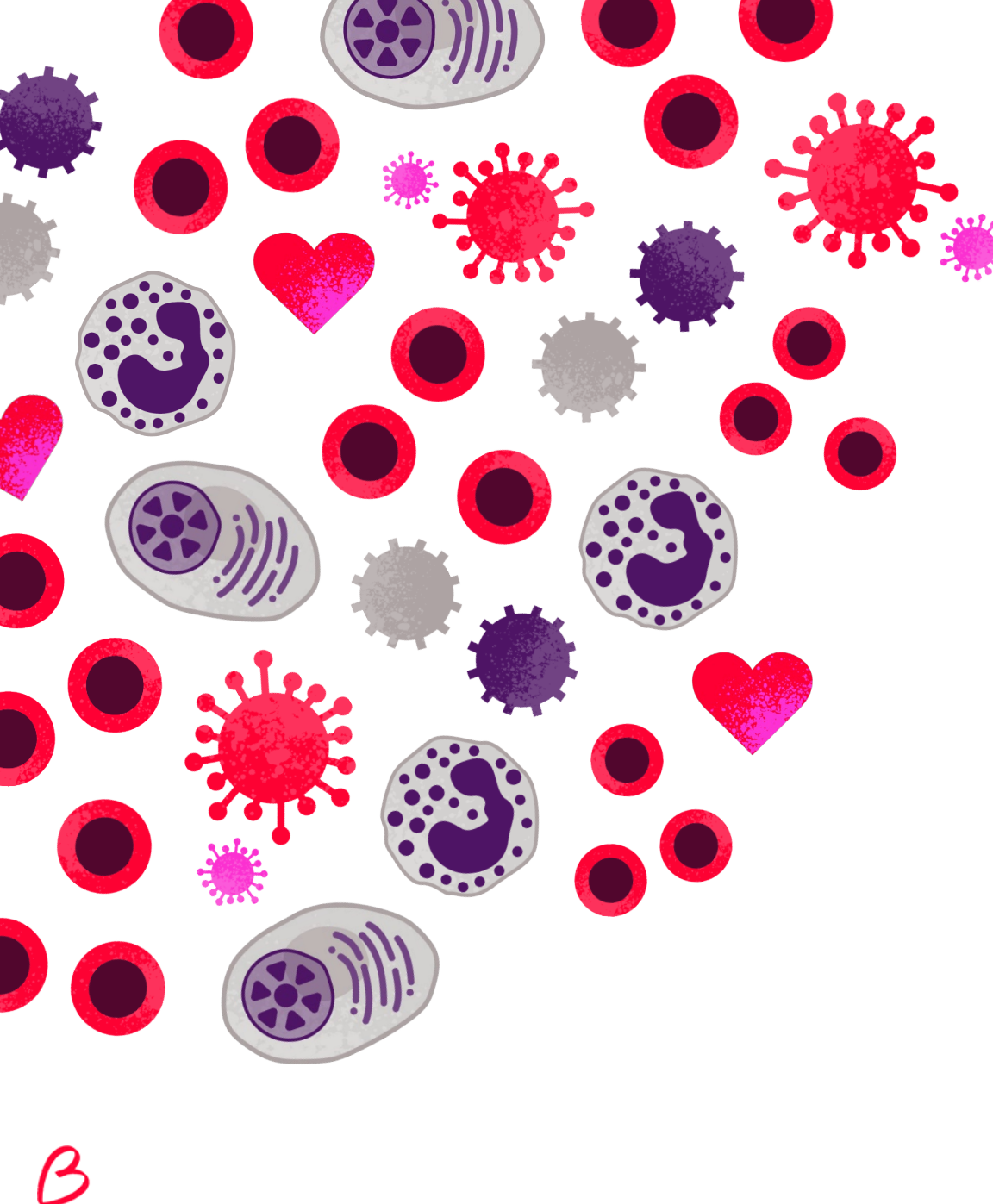




Blood Cancer UK
Grants Portal:
Guidance for
New Users



What is the Blood Cancer UK Grants Portal?

- The Blood Cancer UK Grants Portal is our new online grants management system. It can be accessed at:
<https://funding.bloodcancer.org.uk/>
- It will replace our previous system, Grant Tracker, which will be fully discontinued by December 2026.
- The new Blood Cancer UK Grants Portal is open for the development and submission of all new funding applications.
- This guidance outlines how to get started on the new portal and how to submit a funding application.
- All existing grants will continue to be managed through Grant Tracker until later in the year when these will be migrated to the new portal.
- Additional guidance on managing your active grants through the new portal will be provided at that point.

Navigating the Login page

If you have logged to the Grants Portal before simply add your username (email) and password here and click Log In

FIRST TIME USERS

If you **do not** have an existing Grant Tracker account, the first time you navigate to the login page you will need to register for an account by clicking this link.

Welcome to the Blood Cancer UK Grants Portal

Log in with Blood Cancer SSO

OR

Username*

Password*

Show password

Log in

Can't access your account? [Reset your password](#)

Don't have an Blood Cancer UK Grants Portal account? [Register now](#)

Powered by [OmniStar](#)

FIRST TIME USERS

If you **do** have an existing Grant Tracker account, the first time you navigate to the login page you will need to reset your password here to set up a new password for the Grants Portal. Your existing password for Grant Tracker will remain unchanged.

If you ever forget your password, you can always reset it here.

Registering for an Account

1. On the registration page please fill in the required fields – if information is missing, the system will provide guidance in red text underneath the question.
2. Choose a password:
 - Passwords must be at least 10 alphanumeric characters.
 - They must contain at least one symbol.
 - They must include at least one numeric value.
 - They must contain both uppercase and lowercase letters.
 - Users cannot reuse a password. It must contain at least 3 different digits to a previous password.
3. Click the I'm not a robot button
4. Click this button to register your account



Register an account

Email address (this will be used for your username)

First name *

Last name *

Choose a password ⓘ

Confirm your password *

I'm not a robot



reCAPTCHA

✓ Register an account

Already have an account? [Log in](#)


B

Resetting your password

1. Enter your username (email address)
2. Click I'm not a robot
3. Click reset password
4. You will be emailed a 6-digit code which you need to fill in on the next screen within 15 minutes
5. Once you have submitted the code you will be taken to a screen where you can reset your password following the requirements described in the previous slide

Reset password

Enter your username*

I'm not a robot 

[Already have an account? Log in](#)

Verify reset password code

We've sent a 6-digit verification code to your email address. Enter it below to continue.

[Cancel](#)

[Didn't get the code or the code has expired? You can resend the code by clicking here](#)

Set Password

Choose a password*

Password must be specified.

The password must be a minimum of ten characters in length and contain at least four of the following four types of characters; uppercase, lowercase, numeric, non alphanumeric;

Confirm your password*

[Cancel](#)

Navigating the System – The Menu Bar (part 1)

The left-hand side of the menu bar has the following functions:

Home Page Link

You can navigate back to your homepage from anywhere in the system by clicking here.



Main Portal sections



Use these menu items to navigate the different modules in the system. Depending on your role and whether records have been shared with you, options in the menu may be shown or hidden. Currently you may only see 'applications' until you have active approvals or projects:

Applications

From here you can manage all applications you have created or that have been shared with you.

Approvals

If you are added to an application as a Department Head or Head of Research Office, you will be required to approve the completed applications before they are received by Blood Cancer UK.

Projects

This module will be activated later in the year.

Navigating the System - The Menu Bar (part 2)

The right-hand side of the menu bar has the following functions:

Search

You can search your portal using key terms including application, grant reference or keyword from the title.

User Profile

You can update your profile, user settings, password etc. here.



Notifications

All notifications and emails you receive through the portal can be accessed here.

Tutorial

Each time you navigate to a new section of the portal a tutorial will play highlighting the key features. This will not autoplay again but if you want to access it on future visits you can press the play button on the menu bar of the relevant page.

Help

If there is additional page specific help available, it can be accessed here.

Navigating The System – Your Homepage

Within your homepage you have the following key sections:

Rounds: all currently open funding calls. You can start a new application to any call by clicking ‘apply now’ against the relevant round. You can download the guidance document for the round by clicking on the title of the round.

- **Top 5 in progress applications:** the latest 5 applications you are currently involved in that have not yet been submitted.
- **Top 5 projects:** the most recent 5 active grants you are involved in – this will be activated later in the year.
- **Top 5 milestones due:** in the system all activities within the project are called milestones, this includes progress reports and financial claims. This section shows the most recent 5 milestones that are upcoming for your active grants this will be activated later in the year.
- **Your Activities:** key elements that need your attention. You can click on the boxes to be taken to a more detailed list.
- **Top 5 applications:** the last 5 applications you have been involved in showing their progression stage (in progress/submitted/decision).

If there are more than 5 items in in any of these ‘top 5’ sections, there will be a ‘View all’ button that shows you the full list.

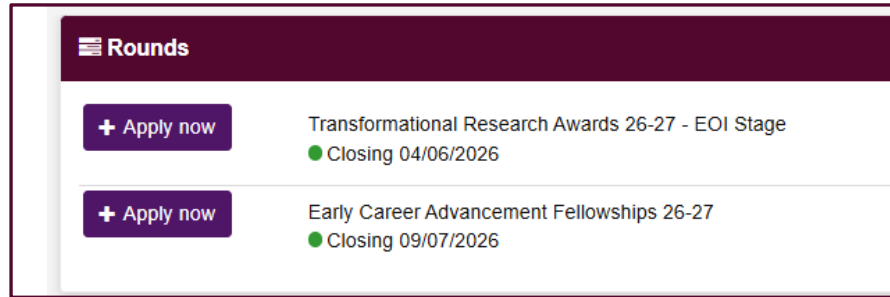
The screenshot displays the user's homepage with the following sections:

- Rounds:** Two funding calls are listed. The first is 'Transformational Research Awards 26-27 - EOI Stage' with a closing date of 04/06/2026. The second is 'Early Career Advancement Fellowships 26-27' with a closing date of 09/07/2026. Each has a '+ Apply now' button.
- Top 5 in progress applications:** A list of five applications with their IDs and names: 2026/ECAF0015 (srix test application 5), 2026/ECAF0014 (Srix test application 4), 2026/ECAF0013 (SRix test application 3), 2026/TRA0018 (SRix test application 2), and 2026/TRA0017 (SRix Test Application 1). A 'View all' button is at the bottom right.
- Top 5 projects:** A message stating 'There are no records to display.'
- Top 5 milestones due:** A message stating 'There are no records to display.'
- Your activities:** Two summary boxes: 'Applications' (17 in progress) and 'Approvals' (2 to action).
- Top 5 applications:** A detailed view of the top 5 applications from the previous section. Each application is shown with a progress bar and three stages: 1. IN PROGRESS, 2. SUBMISSION, and 3. DECISION. The progress bar for the first stage is highlighted in green.

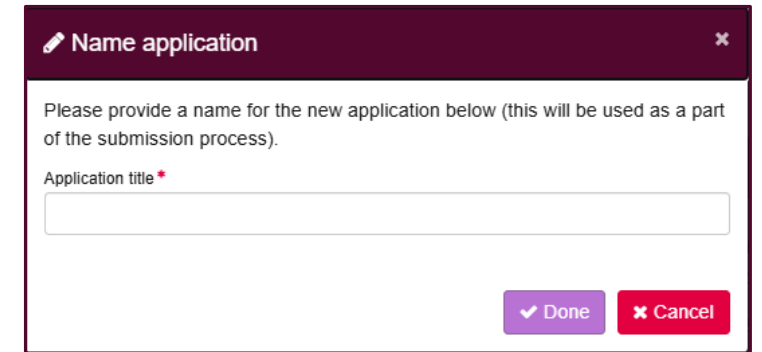
Starting a new application

All new applications must be completed by the Lead Applicant.

1. Navigate to your homepage and click 'apply now' next to the grant scheme of interest.



2. A popup will appear that asks you to name the new application. Fill in the title and click done.



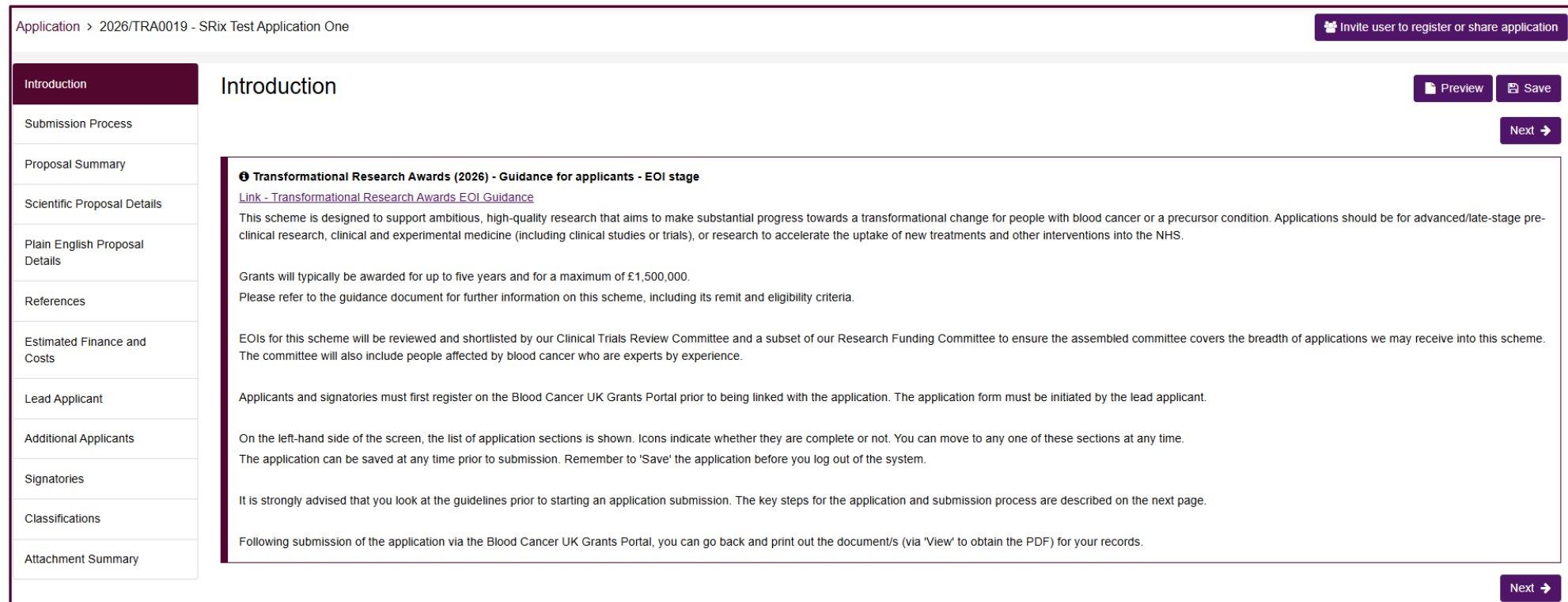
3. The application form will then automatically open.

Navigate through the pages by clicking the sections listed in the menu on the left or by using the previous/next buttons at the bottom of the page.

The form autosaves as you navigate through it.

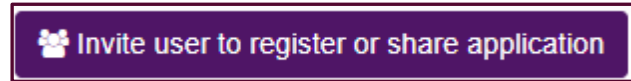
If you want to leave and come back later click 'Save' at the top of the screen.

To edit the application again later, search for it from the menu bar or access it through the applications section.

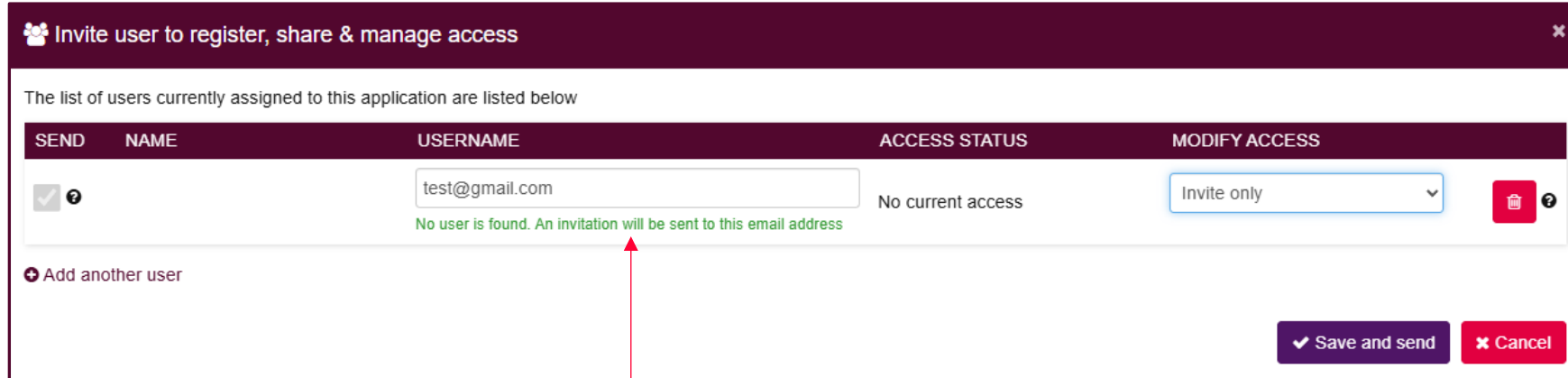


Inviting Additional People to Access the Application

Once the application has been started, additional individuals can be invited to help develop or check the application before submission, whether they are going to have a specified role in the application or not. Users can be added using the invite user button at the top right of the screen when you have an application form open:



This opens the following popup:



SEND	NAME	USERNAME	ACCESS STATUS	MODIFY ACCESS
<input checked="" type="checkbox"/>		<input type="text" value="test@gmail.com"/> <small>No user is found. An invitation will be sent to this email address</small>	No current access	Invite only <input type="button" value="🗑️"/>

+ Add another user

Save and send Cancel

To add someone please fill in their email address in the USERNAME box and then click away from the box. The system will then search for an active account with that email address and let you know using the green text below the box whether one has been found or not. It is not a problem either way, the individual can still be added.

You can give individuals 'view' or 'edit' permissions using the drop-down menu under MODIFY ACCESS. Using 'invite only' when inviting new individuals to register on the system, will only mean they are invited to create an account and will not add them to the application, so is not recommended.

Once you have added their email address and picked their access level you can press 'save and send'.

If an individual you want to share an application with is an existing Blood Cancer UK Grants Portal account holder, they will be emailed automatically once you click save and send to let them know you have given them access. Your application will then be listed in appear in their Grants Portal account. If they have not logged in before they will just need to follow the instructions on slides 3-5.

If an individual you want to share an application with does not have a Blood Cancer UK Grants Portal account, once you click save and send the system will email them with an invitation to register and inform them that you have shared an application with them. Your application will then be listed in their Portal account once they have registered.

NOTE: in this section you do not define the individual's role (Co-applicants, Co-investigators, Department Head, Pre-award Administrators etc) but you will need to specify those roles on the application form itself in the sections 'Additional Applicants' or 'Administrators and Signatories'. **This can only be done after individuals have been added to the application as outlined above – more details are provided on the next slide.**

Adding people to specified roles

After individuals have been invited to access the application, you will be able to add them to specified roles in the relevant sections of the application form: Additional Applicants or Administrators and Signatories. This guidance is based on the Early Advancement Fellowship scheme. Other forms may vary slightly but work in a similar way.

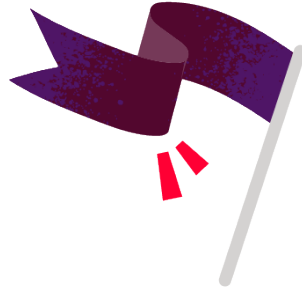
1. Before you specify further applicants, you must share your application with them following the guidance on the previous slide so the system can link them to your form.
2. Once you have shared your application with them if you are on the additional applicants or administrators and signatories page you need to refresh the page.
3. Then go to the relevant applicant type and click on the first box. A list of all those you have linked the form with will appear. Simply choose the correct individual and their information will be populated in the relevant boxes.

The screenshot shows the 'Additional Applicants' section of a form. At the top right are 'Preview' and 'Save' buttons. Below them are 'Previous' and 'Next' navigation buttons. The section is titled 'Co-Investigators' and includes a definition: 'A co-investigator is an investigator who will provide significant intellectual input, as well as overseeing some aspects of the work.' It also provides instructions on how to add details and how to refresh the page. A note states: 'Please note that pre-populated details for each co-investigator (Education, Employment, Publications and Research Grants) will be added to the application form. These are the details individuals have added to their own profiles so please remind them to ensure these are up to date and accurate.' Below this, it says: 'To amend them, they will need to visit their Profile and Publications sections on the Blood Cancer UK Grants Portal as outlined in each section below.' The form fields include a dropdown for 'Co-Investigator *', and input fields for 'Title', 'First Name', 'Surname', 'Institution *', 'Position', and 'Department'. There is a checkbox for 'My institution is not in the list above' and a '+ Add Another' button at the bottom.

4. Where a category allows for more than one applicant of that type ie. Co-investigators, Collaborators, Administrators, click on the 'Add Another' box to add further individuals.

Submission Process

After checking that the form is complete, lead applicant presses 'submit' on the attachment summary page



Signatories check and approve the application or return it to the applicant for edits



Blood Cancer UK staff will validate the application. Applicants will be informed their application has passed initial eligibility checks and is under review

Email notification is sent automatically to both signatories to log into the Grants Portal and approve the application



The application is only formally submitted to Blood Cancer UK once both signatories have approved the application. This must be completed before the 3pm deadline