Funds Management System

Client portal guide for panel members

New Zealand Government

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Ministry for the
Environment
Manatū Mō Te Taiao

Making Aotearoa New Zealand
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Contents

The FMS client portal for panel members

This manual is designed to support panel members who use the Ministry for the Environment's Funds Management System (FMS) client portal to assess applications to grant funding rounds. It covers:

1. getting started

2. navigation and terminology

3. registration via RealMe

4. registering an account for your organisation

5. applying for funding

6. how to apply for funding

7. confirming Intent to Proceed

8. reporting back to the Ministry

9. project completion reporting

10. frequently asked questions (FAQs)

Getting started

The client portal is the external facing component of the FMS. Via the client portal, organisations can apply for open grant funding rounds.

Our approved Panel Members also use the client portal to complete an online assessment of these applications. The information captured via these assessments is collated with the assessments by other Panel Members and provide a cohesive view of all assessments undertaken.

Before you can use the FMS to complete assessments, you will need to register as an FMS client portal user and you will need to create a Panel Member account.

Client portal terminology

Some of the key terms used in the client portal are listed below.

- **RealMe** is a username and password management service provided by the Department of Internal Affairs allows you to use one username and password across many government digital services.

- **User profile** is your own information.

- **Account** is the account for one Panel Member.

- **Project** is any application made for grant funding, successful or unsuccessful.

- **Assessment** is any online form you will complete to provide an assessment of a project (the application).

- **Report** is an online form that applicant organisations need to complete to provide progress or other information about any successful projects the Ministry is funding.

- **Key contact** is the person the Ministry will contact about any application, or funded project.

- **Accountable Officer** is the signatory for an organisation.

Colour coding

Information on the forms is colour coded to help you quickly identify what type of information is displayed.

Section headers are shown in dark blue

SECTION A: APPLICANT DETAILS   List 3-5 key health and safety responsibilities of the role described.

Help text is shown in green

Note: this section is OPTIONAL as the relevant data information is captured in Section E.

- If your project is successful what benefits/impacts will it contribute to New Zealand, and for New Zealanders?
- How will you demonstrate and quantify those benefits/impacts?

Read only fields are displayed with a blue background
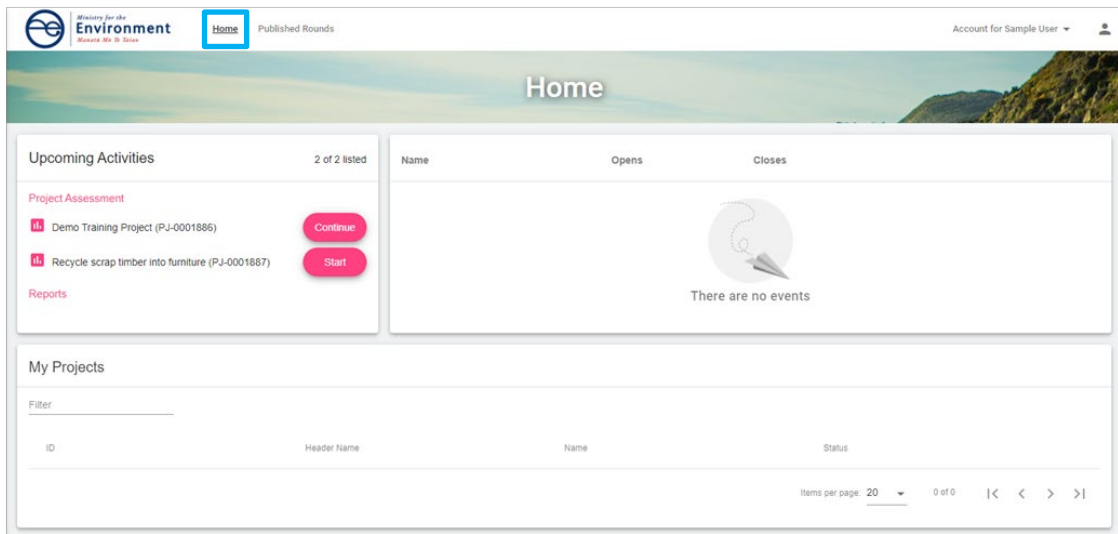
Deed number
ABC-1234567

Questions and **field hints** are shown in grey

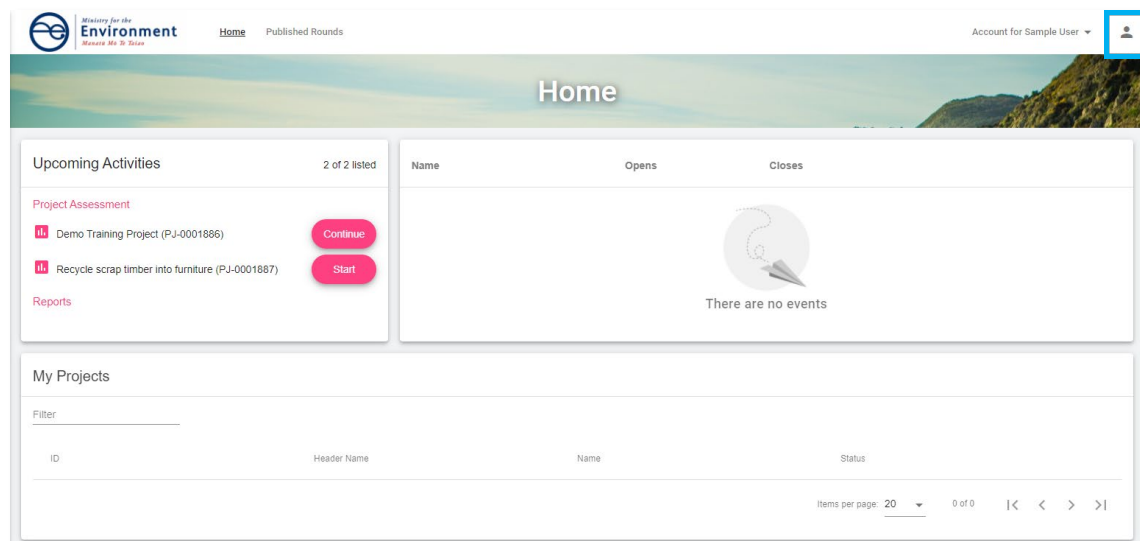Waste Stream impacted by your successful project *
Select up to 3

Finding your way around the client portal

Once registered, your homepage will be displayed. Wherever you are in the client portal, click on **Home** to get back to your homepage.


Manage your **user profile** by clicking on the person icon. This is the information we will use to contact you.

Events, such as a grant round that applicant organisations can apply to, are displayed here. The image below shows you how an applicant organisation will see their homepage. The links allow them to apply to the Fund.

As a panel member, you may be shown a link in this section of your homepage where we wish to access to information about application round events.
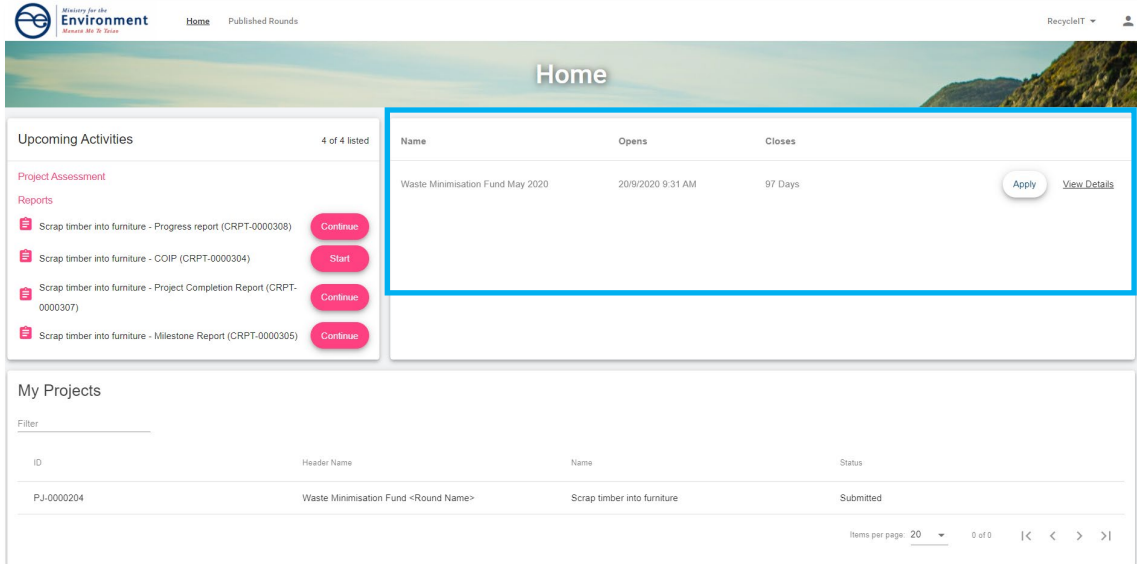

My Projects lists all draft **applications** an applicant organisation has started and the applications they have **submitted**. As a panel member, this section will be blank.
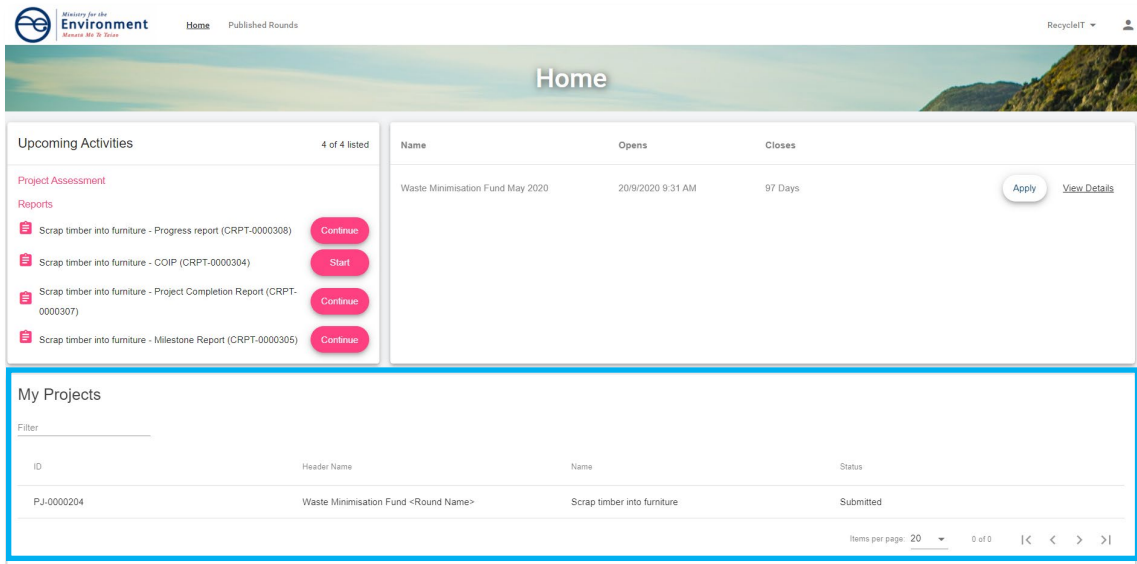
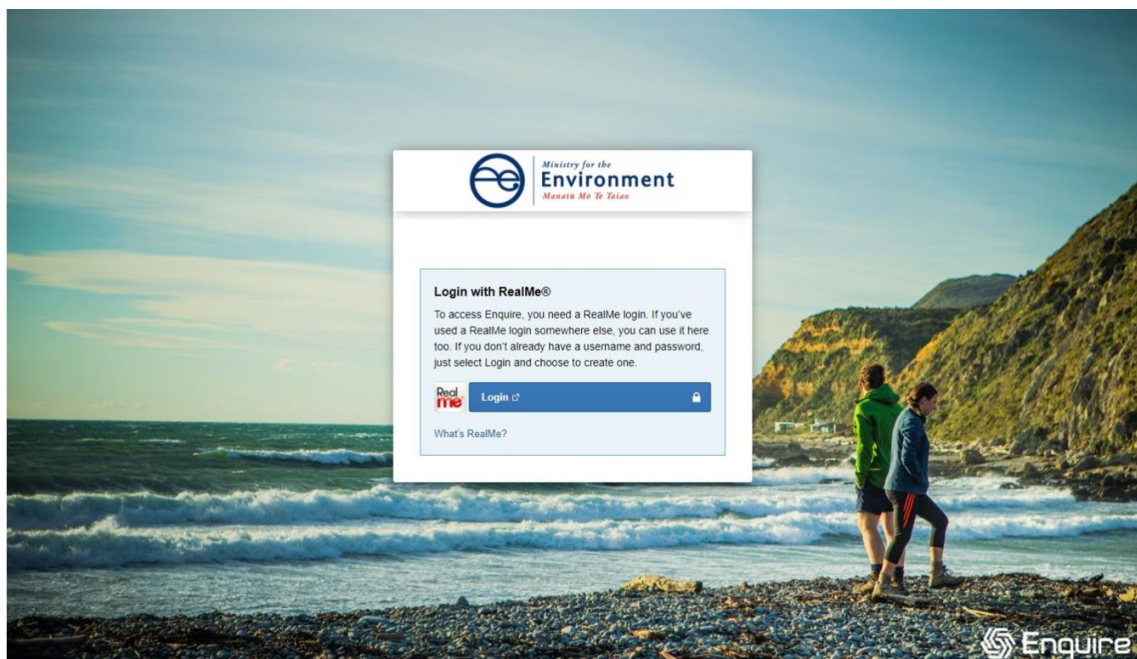**Project Assessment** will list any assessment of an application that we have sent you to complete.

Reports is for successful applicant organisations who need to periodically provide reports about their progress and use of their grant funding.
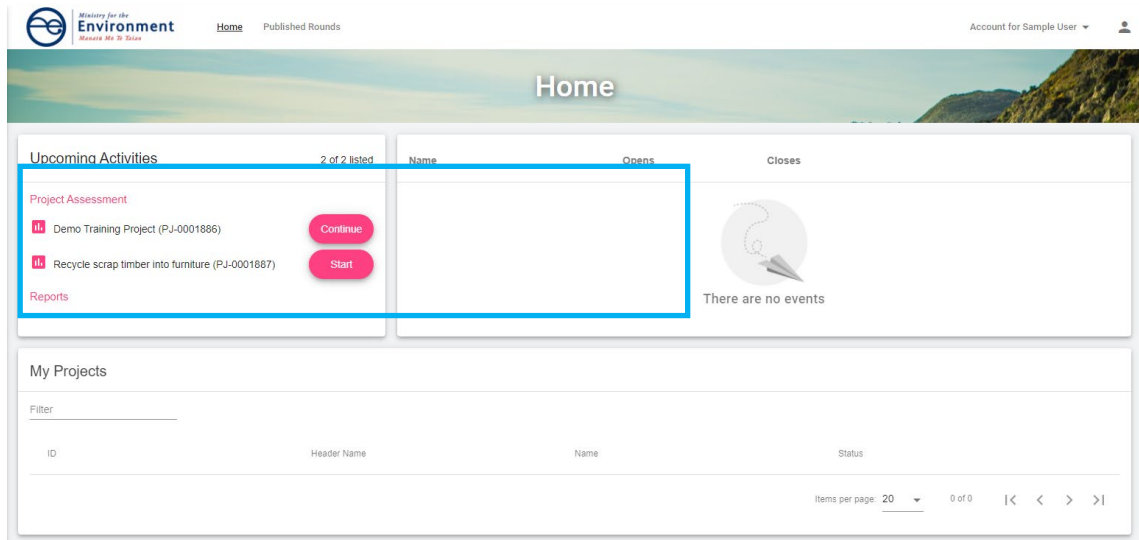
How to register as an FMS user via RealMe

Before you can access the client portal, you will need to register. FMS uses RealMe to manage your login details. In order to register for FMS, you will first need a RealMe account.

If you already have a RealMe login, go to https://fms-cp.mfe-enquire.cloud/login and enter your **RealMe username** and **password**. Then **Login**.

If you do not have a RealMe account, you will need to create one. Select Login, then select **Create a RealMe login**.

Complete the RealMe **registration** form and **submit**.

RealMe will require you to provide a mobile number and alternative contact number in addition to several security questions to assist you if you forget your RealMe username or password. Optionally, you can choose to add a PIN number to your RealMe account.

If you are unsure at any stage of the RealMe process, refer to the RealMe help at: https://www.realme.govt.nz/help/.

Completing the 2-factor authentication requirements

RealMe requires you to provide either a mobile phone number or to use the Google Authenticator app to verify your registration. We encourage the use of the Google Authenticator option. If you do not have Google Authenticator, but wish to use this option, then download it to your smartphone from your app store.

Once verified, each time you log in, RealMe will send you a unique code to your mobile (by text or the Google Authenticator app). To complete your login to FMS, you will need to enter a valid code.

Set up Google Authenticator

❶ Download and install the Google Authenticator app on your smartphone or tablet. You can download it from the app store or play store.

❷ Link Google Authenticator to your RealMe account by scanning the QR code.

Use secret key instead

❸ Enter the six digit code from the Google Authenticator app.

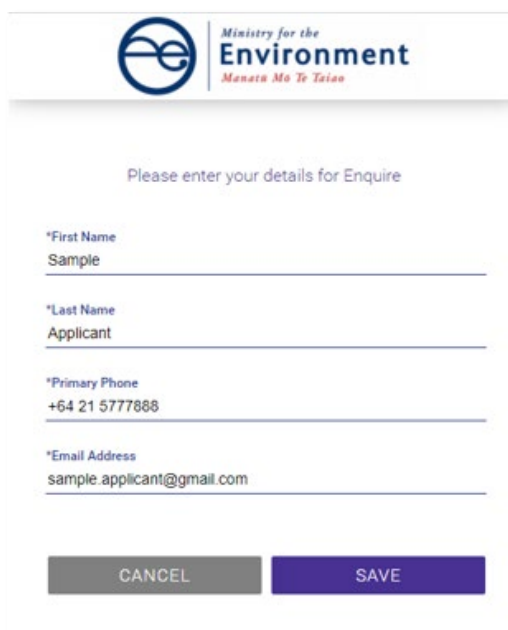Authentication code
7 2 6 1 7 4

CONTINUE

BACK

Completing your FMS registration

Once you have registered with RealMe, you will be redirected back to FMS. RealMe does not share any of your personal registration details with FMS. It manages your username and password so that you do not need a different password for FMS than other New Zealand Government systems that use RealMe.

When you login to FMS using your RealMe login and password for the first time, you will be asked to complete an FMS user registration form. Please provide your contact details .
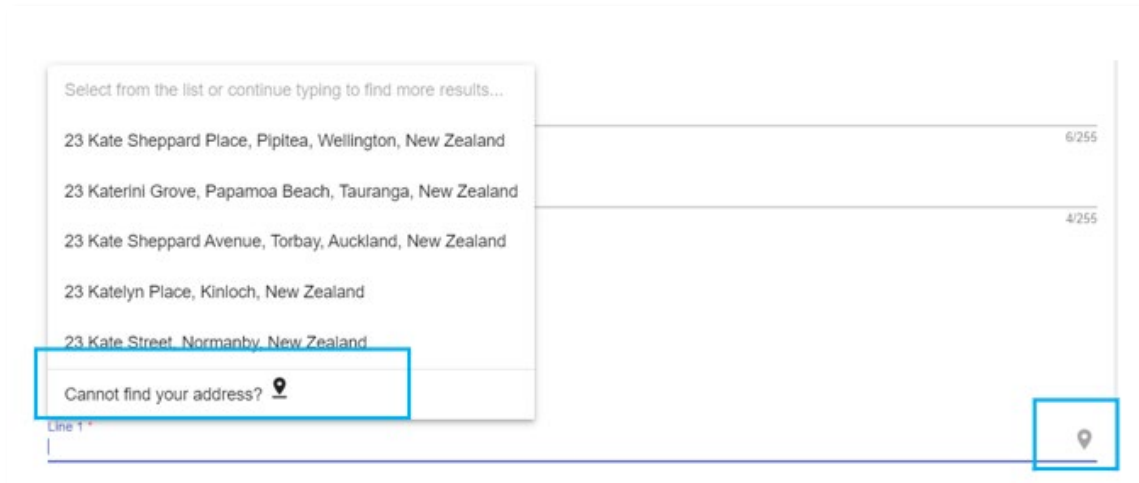
Register with FMS

Complete the FMS registration form with your contact details for grant applications/projects.
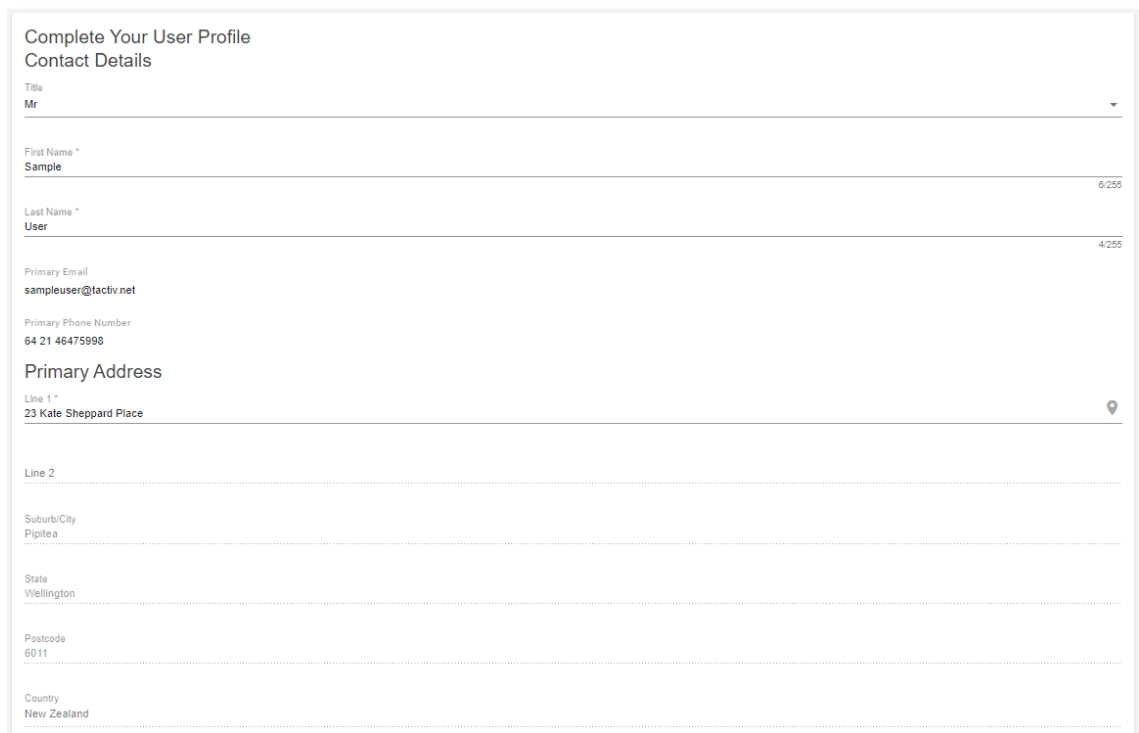
Please enter your details for Enquire

*First Name
Sample

*Last Name
Applicant

*Primary Phone
+64 21 5777888

*Email Address
sample.applicant@gmail.com

CANCEL   SAVE

Complete your user profile

Your user profile will ask you for a few extra details such as your title and address. If you have any issues with the address finder, select the location icon to enter an address manually.

The acknowledgement response must be ticked before you select **Save**. This will provide you with further information about your registration.

How to register as a panel member

Once you have registered as a user, you will need to create an account as a panel member. This differentiates you in the FMS from an applicant organisation, who will complete a more detailed account. Creating your panel member account is a one click action. You will not need to provide any further details.

I am not sure if I am already registered?

Login using your RealMe details. If you have previously registered, you will be directed straight to your homepage. If you have not registered, FMS will require you to register.

How to log out of client portal

Select the profile icon at the top right corner of the client portal then **Log Out**.

Managing your account

How to check and update your contact details

To view or update your user profile, click on the **profile icon** then select your **User Profile.**
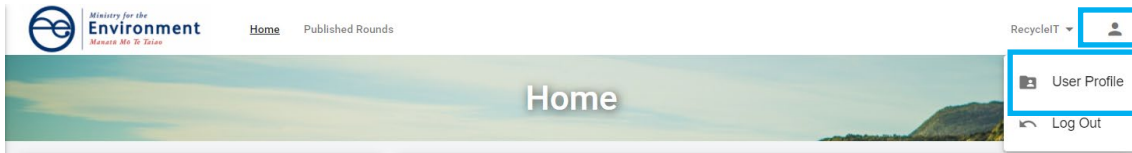
Select **Update** at the bottom of the Your User Profile card. If you are updating your email address or phone number, use the **Update Email** and **Update Primary Phone** options.

Make the necessary updates then select **Save**. Your **User Profile** will now show the updates.

How to complete an assessment

Notifications you will receive

Each time you are assigned an application to assess, you will receive an email notification from FMS advising you there is an application awaiting your assessment.

Login to the FMS by following the link in the notification and entering your RealMe username and password. You will be directed to your homepage.
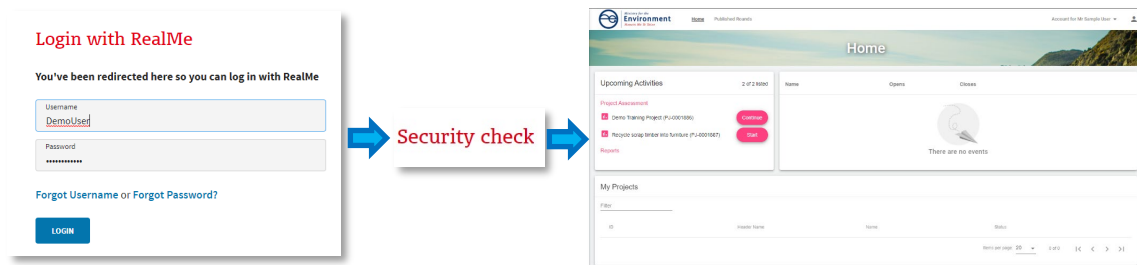

The assessment task will be displayed under **Upcoming Activities**. You may have many assessment tasks displayed, depending upon the number of assessments you have been assigned at any one time.

The assessment task will display the name and unique project ID for the application.
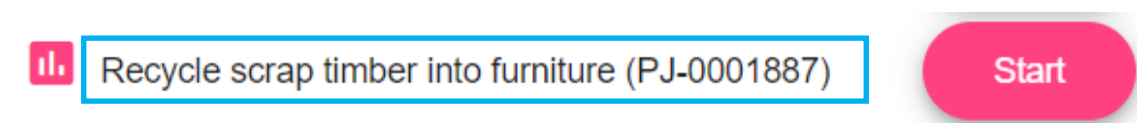
This task should correspond with the list of assessments assigned to you,. If an assessment task is unexpected, please contact the fund administrator for assistance.

If you have a conflict of interest in completing the assessment, advise us following the instructions provided with your list of applications to assess. **Do not** submit the assessment.

If we advise you to continue, the task will remain on your dashboard. If we advise you should not complete the assessment, it will be reassigned to a different panel member by the fund administrator. It will then automatically drop off your list of Project Assessment tasks.

In parallel to receiving the assessment tasks for a round, the fund administrator will provide you with a zip file. This will contain a series of document folders, one for each project application.
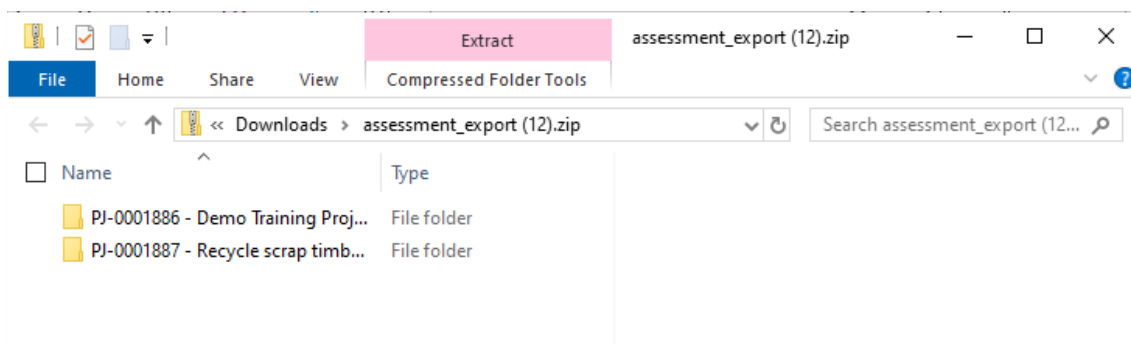
The folders are named with the unique project ID and project name to be easily correlated with the assessment tasks.
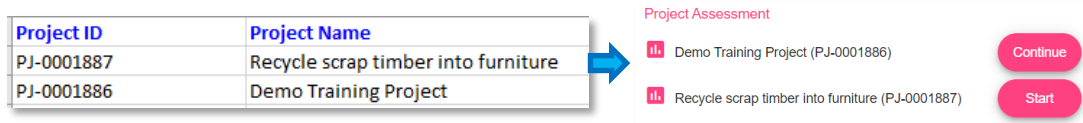
Select to open the corresponding document folder in the zip file to obtain a copy of:

- the application
- any documents provided with the application
- the internal review document completed our investment manager following a review of the application
- any other relevant documentation saved to the project documents library by the time of your assessment.

If in doubt whether a document is relevant to the assessment, contact us for help.
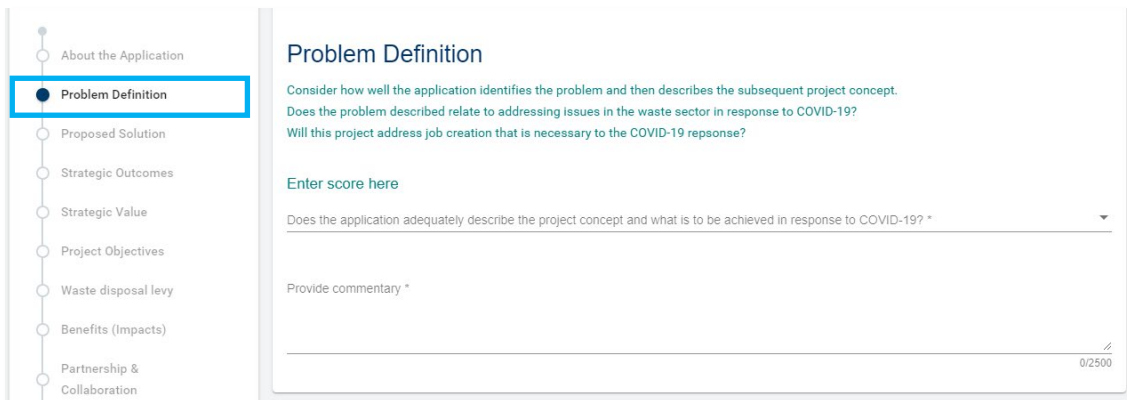
How to start an assessment

From **Upcoming Activities,** select **Start** on the assessment task. The assessment form will open.

The form is divided into steps. Each step corresponds to one or more sections of the application form. The order of the steps follows the order of the sections in the application form.
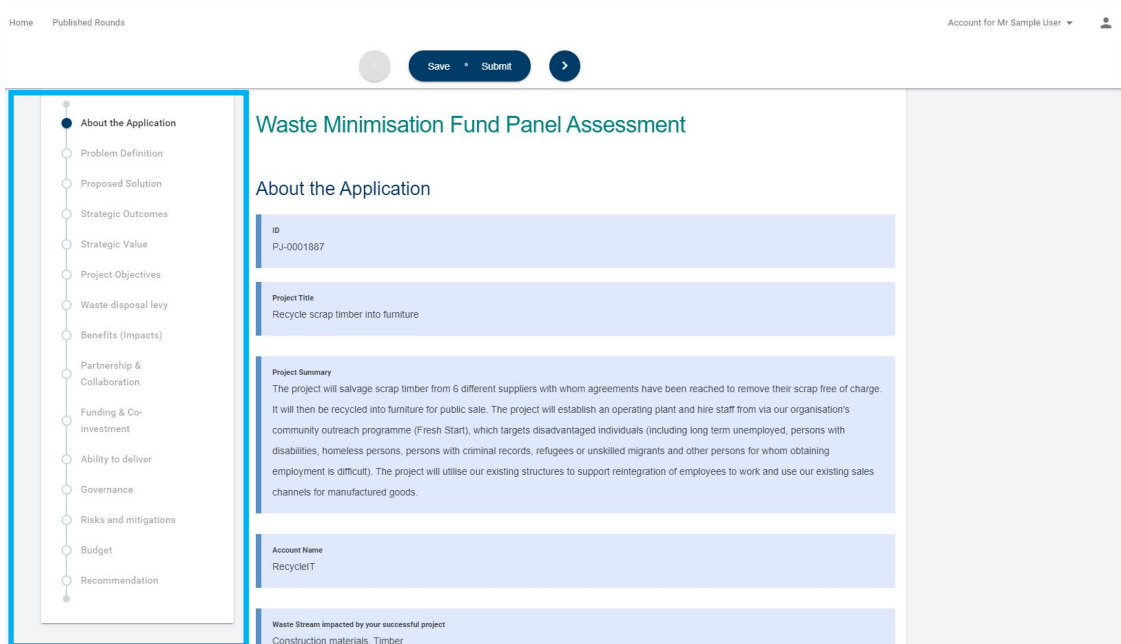
Navigate through the form using the form stepper by selecting the step you wish to move to.

Alternatively, use the forward and back arrows to move through the steps in sequence.
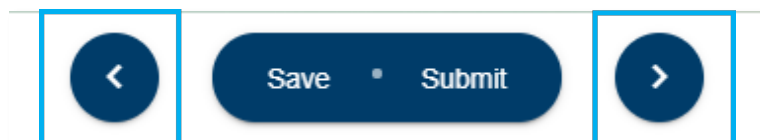
How to save and resume an assessment

At any point, you can save the assessment by selecting **Save**. FMS will advise you that the assessment has been saved.

To resume the assessment from your homepage, select **Continue**.

The saved assessment form will reopen and allow you to complete your assessment. You can save and resume as often as needed.
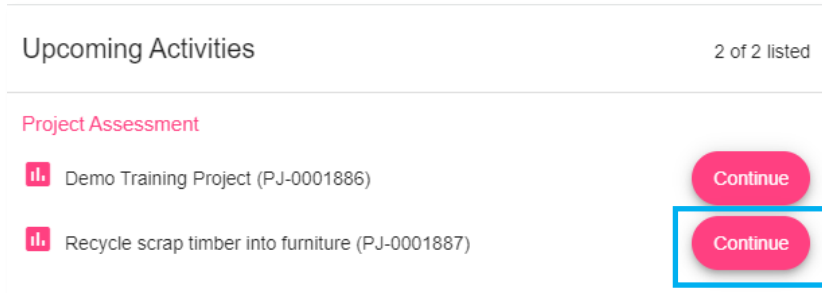

About the Application step

About the Application is a reference step. It provides some key information from the application form and is read only. Wherever you see information with a blue background, this indicates the information is read only reference information.

How to score the application

On each assessment step, one or more questions are presented. Enter a score for each assessment question by selecting the down arrow and choosing your score from the list provided.

Help text (shown in green) will provide additional information to help you understand your scoring options.

Enter a succinct comment to support your score in the text box provided. Comments should provide a clear rationale for the score selected.

Please note: Comments may be used during moderation to better understand the scoring provided by the panel. They are not shown to the applicant. However, they are stored in the FMS and the Ministry may be required to share this information, for example, via an Official Information Act request.

Character limits

Comment fields have a maximum character count, which is displayed at the bottom right of the field. As you type, the character counter will keep count to help you stay under the maximum characters allowed.

Avoiding scrolling within fields

To extend the viewable area of the field, click on the extend icon ✎ and drag the corner of the field down.

Provide commentary *

Outcomes are clearly articulated but is not entirely clear how the problems described relate to waste management. The focus in the application is on social outcomes, which are very clearly articulated, along with the problem being addressed. However, the waste management issues appear to be a secondary consideration. There is a clear statement of the jobs that will be created and how sustainability around those jobs will be maintained. More information would likely strengthen its articulation of the waste management issues it is addressing as these are implied rather than stated.

589/2500

How to make a recommendation

Once you have completed and reviewed your assessment of the application, the final step is to provide your recommendation.

The first two questions and comments provide information to the Ministry that will help in relation to contracting. They focus on how the project can be further strengthened. This is followed by your recommendation, based on your assessment.

Select your responses and enter your commentary for all fields.

Recommendation

Consider the following when making your recommendation:

- Is the nature of the problem/opportunity clearly identified?
- Does the proposal clearly specify how waste minimisation will be promoted or achieved.
- Is achieving the proposed solution dependent on other external factors? If yes, has how they will be addressed been adequately stated?
- Does the proposed solution address all aspects of the identified problem?
- Does the proposed project with its milestone schedule clearly align to successfully delivering the stated SMART project objectives and subsequent impacts?

To what level can the project be improved? *

Describe how the project can be improved *

0/4000

What number of conditions / changes would be required to achieve this improvement? *

Describe the conditions or changes required to achieve this improvement *

0/4000

Enter recommendation here

Recommendation following assessment *

Provide commentary *

0/4000

How to submit your assessment

It is important to review your completed assessment prior to submission. Once submitted, your assessment will automatically be removed from your task list. You will not be able to restart/resume a submitted application.

From the navigation bar at the top of the form, select **Submit**. FMS will display a message that the assessment has been successfully submitted.

FMS will prevent you from submitting the assessment if any mandatory information has not been completed. Missing information will be highlighted in the stepper and on the individual step.

Once you have resolved any errors, retry the **Submit** action. FMS will advise you when your assessment has been successfully submitted.

What happens next?

When you submit your assessment form, it is captured within the FMS along with the assessments of other panel members. The FMS allows us to easily track assessments, ensure that they have been completed and compile the combined scores and commentary for moderation.

We will continue to coordinate the moderation meeting and provide you with the information required. This will include a copy of the assessment you provided for each project.

Frequently asked questions (FAQs)

Who do I contact for help?

For help with our assessment process, clarifications on what is required, or questions about an application, please us.

MfE Fund	Contact Details
Waste Minimisation Fund	WMF@mfe.govt.nz

For technical assistance with the client portal, contact **Enquire Support** at enquiresupport@tactiv.net

What if I forget my username or password?

To reset your password, go to the **Login** tab and select **Forgotten Your Username or Password?** This will redirect you to the RealMe service where you will follow the RealMe process for resetting your password.

## If I update my contact details in RealMe, will they have updated in the FMS?

RealMe does not pass any of your personal details to the FMS. If your phone number, email address or other contact information change, please update your user profile in FMS to ensure we have the correct contact details on file. For more details, see Error! Reference source not found.

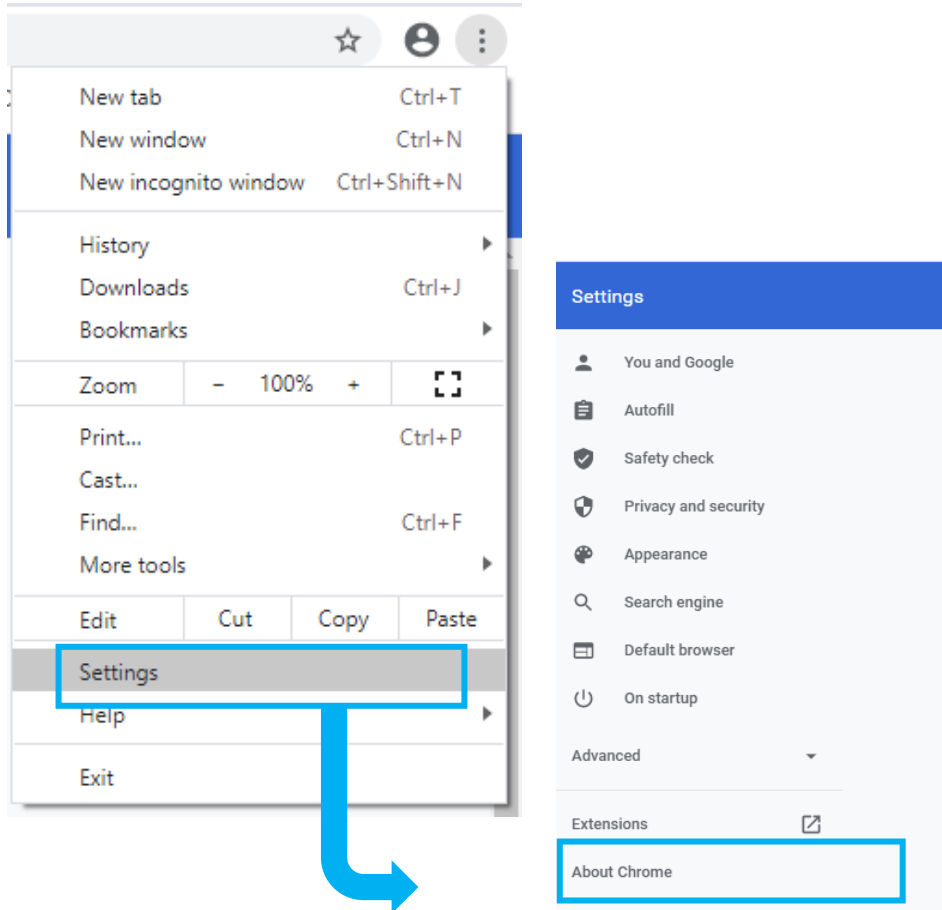## How do I confirm the Internet browser and version I am using?

To assist with any queries and to diagnose problems, it may be necessary to confirm what internet browser is being used and its version number. FMS supports the latest browser version of Chrome, Firefox and Microsoft Edge.
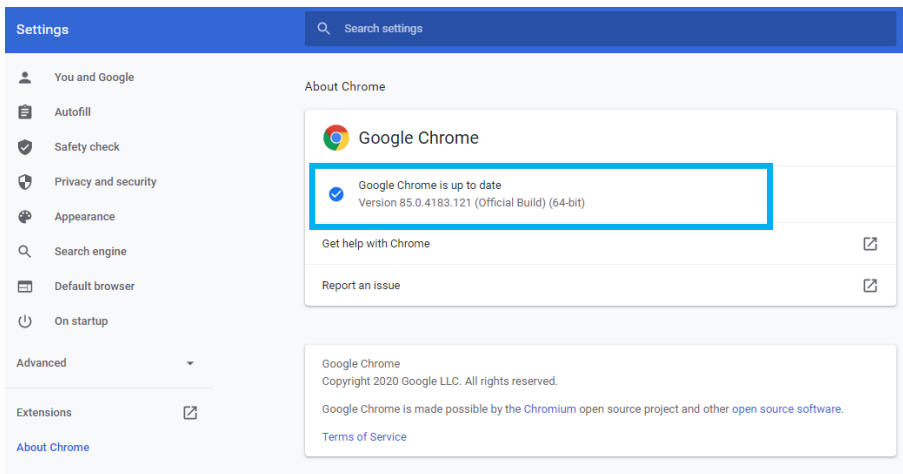
Google Chrome

Select the **More** menu.
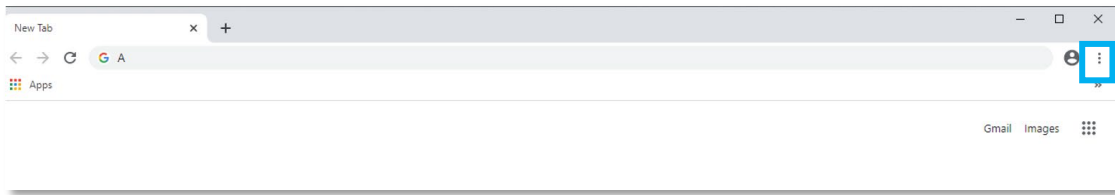
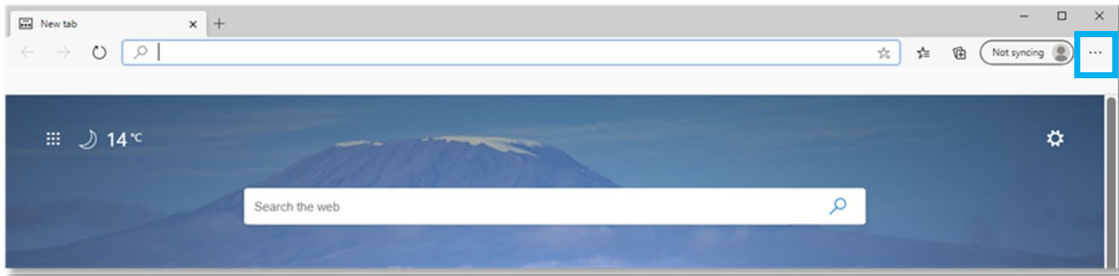Select **Settings**, then select **About Chrome**

Chrome will now display the version number.
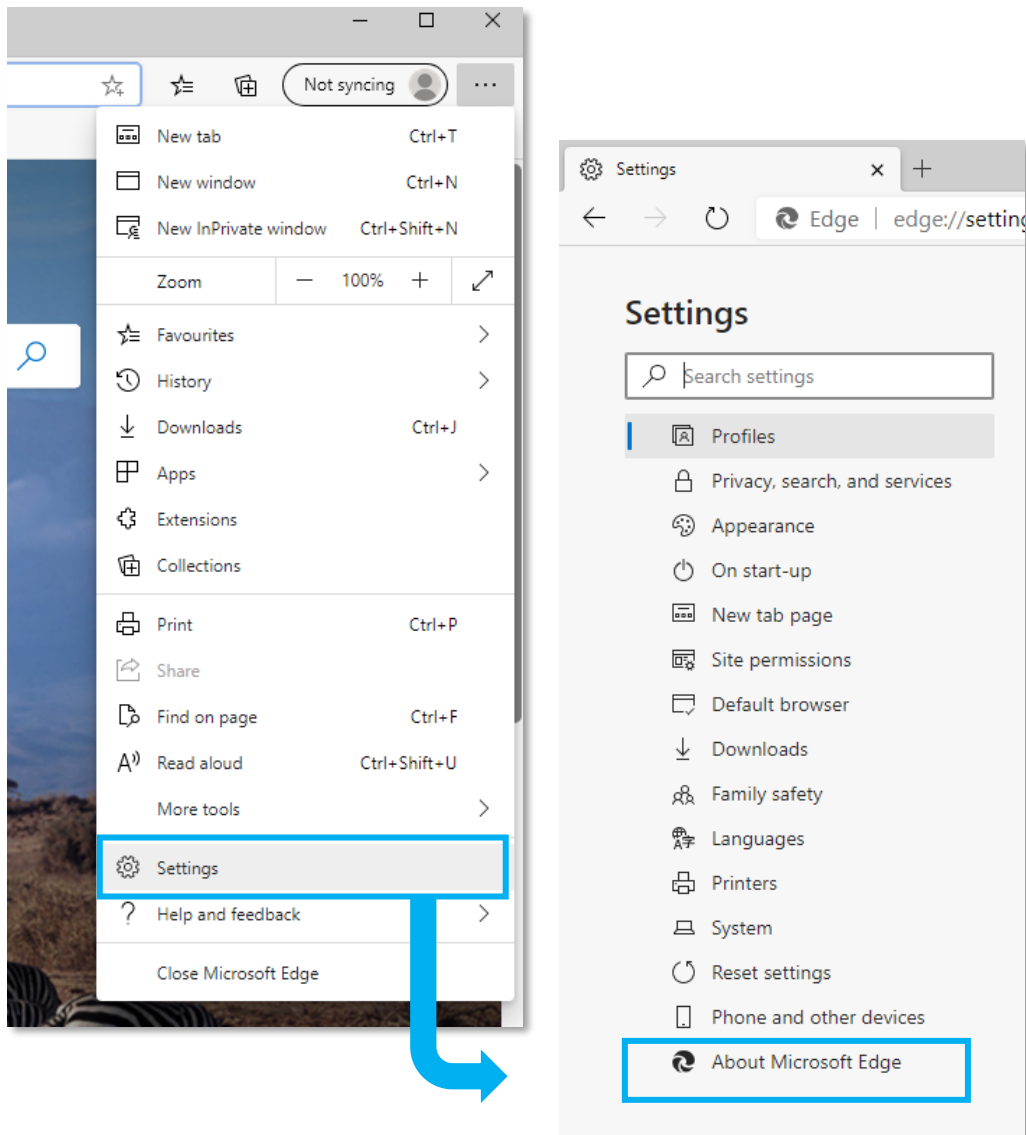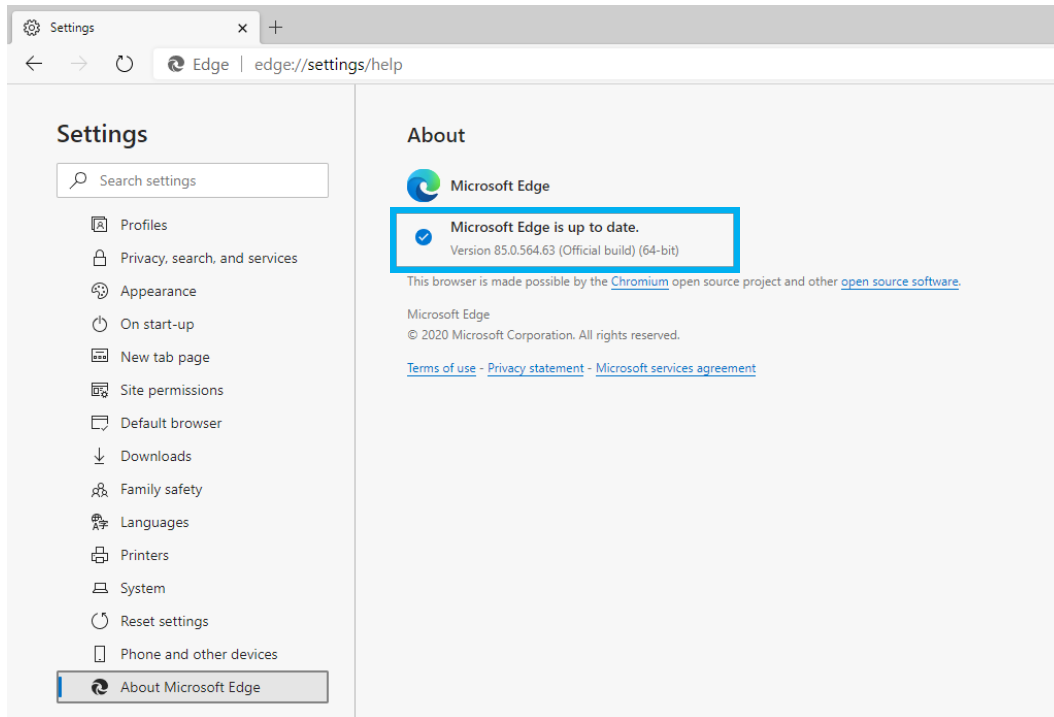
Microsoft Edge

Open Microsoft Edge and select the **More** menu in the top right corner.

Select **Settings**, then select **About Microsoft Edge**
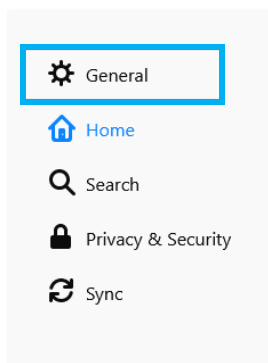
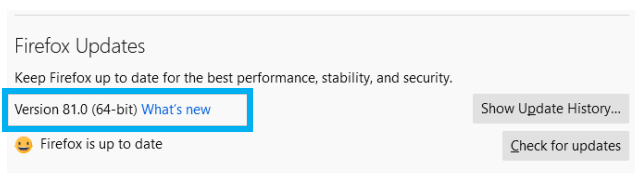Edge will now display the version number

Firefox Browser

Select the cog on the right hand of the screen

Select **General**

Scroll down to **Firefox Updates** to view the version number

How do I clear my browser cache?

You may need to clear your browser's cache to resolve any unexpected issues on the Client Portal. Please ensure any work is saved before proceeding with the steps below as you will need to close the browser down to finish the process.

Google Chrome

Open the **Clear Browsing Data** window.

Use the **Ctrl+Shift+Delete** shortcut to bring up the Clear Browsing Data window. Or at the top right of your Chrome select **More tools**, then **Clear browsing data**.
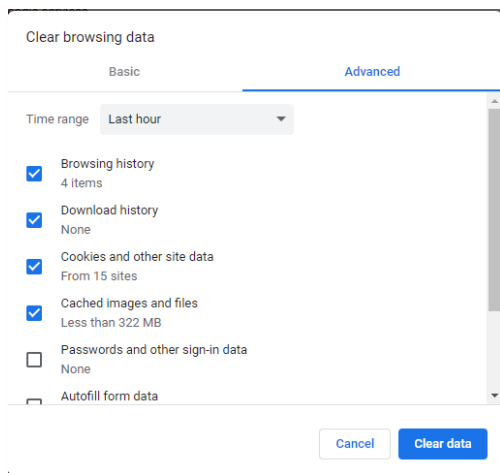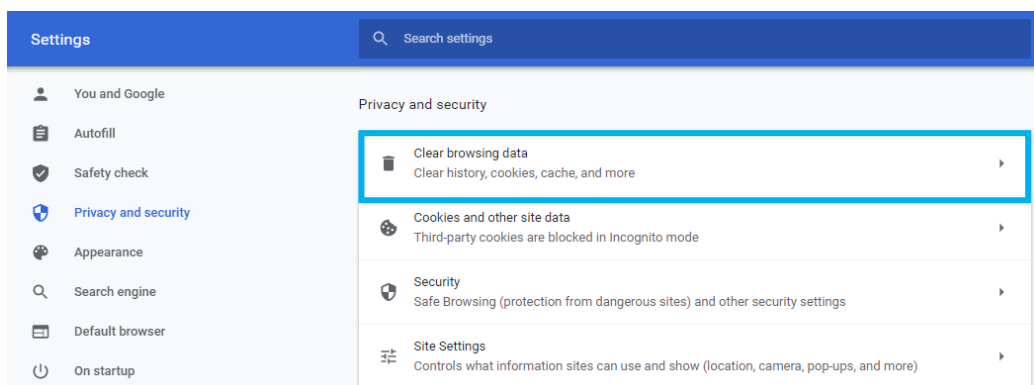

2. On the **Advanced** tab from the Time range drop down menu, select **All time**.

3. Check that the following options have been selected:

- browsing history
- download history
- cookies and other site and plug-in data
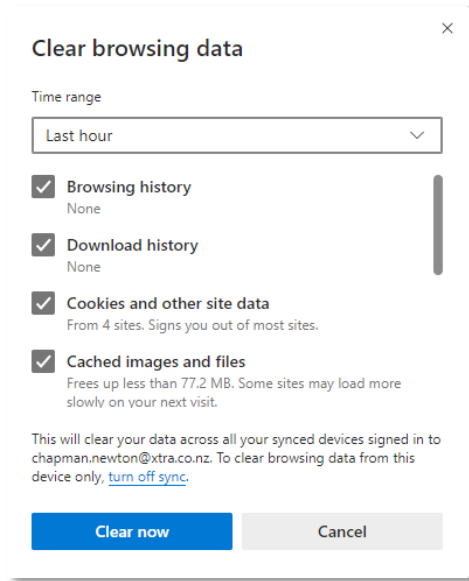- cached images and files.

Select **Clear Data.** Now close all Chrome browser windows to complete the clear cache process.

Alternatively, go to **Settings** and select **Privacy and Security**. Then select **Clear browsing history**.

Microsoft Edge

Open the **Delete Browsing History** window by selecting **Ctrl+Shift+Delete** shortcut.
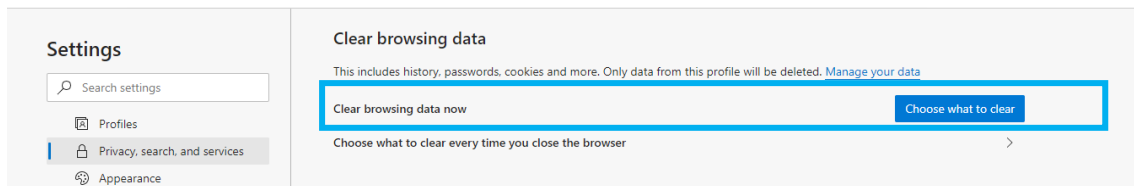

Check that the following options have been selected:

- browsing history
- download history
- cookies and other site and plug-in data
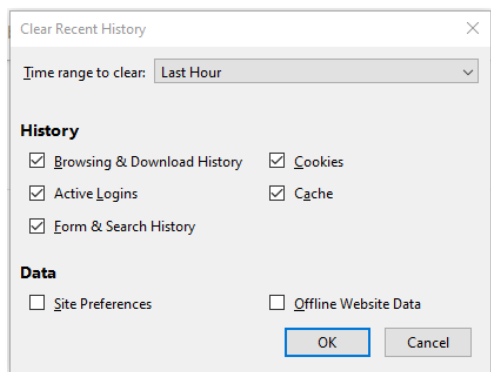- cached images and files.

Select **Clear Now.** Now close all Edge browser windows to complete the clear cache process.

Alternatively, go to **Settings**, select **Privacy, search, and services**. Then select **Choose what to clear**.

Firefox Browser

Open the **Clear Recent History** window by selecting **Ctrl+Shift+Delete** shortcut.
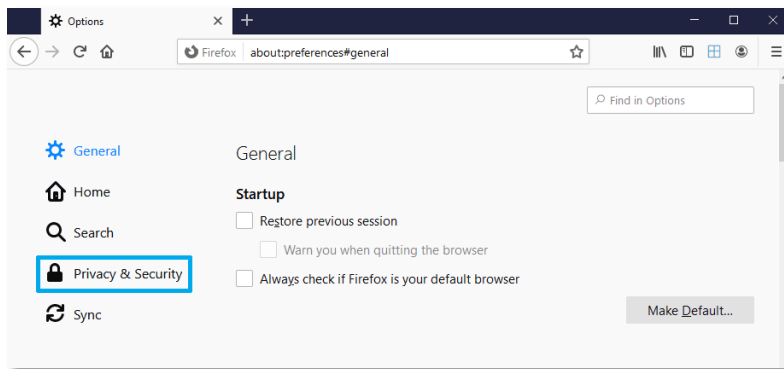
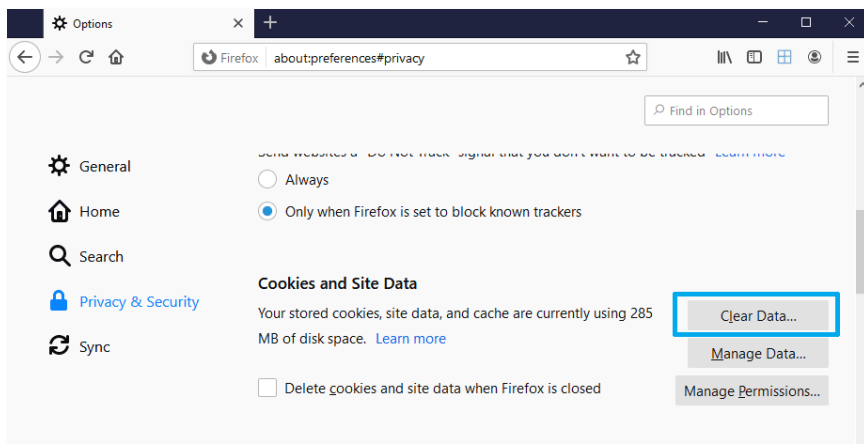Check that the following options have been selected:

- browsing and download History
- active logins
- form and search history
- cookies
- cache

Select **OK**. Now close all Firefox browser windows to complete the clear cache process.
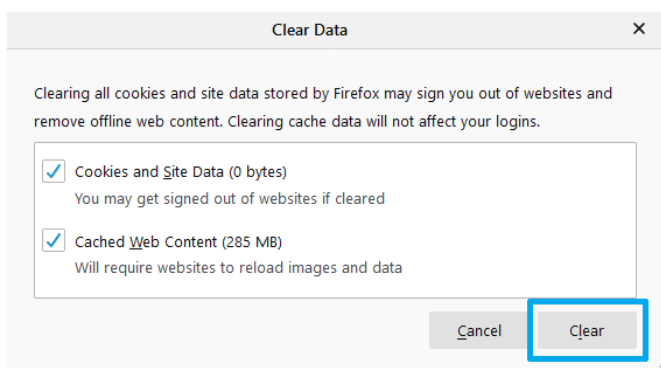
Alternatively, go to **Settings**, select the **Privacy & Security**.

In the **Cookies and Site Data** section, select the **Clear Data** button.

Select **Clear**.

Now close all Firefox browser windows to complete the clear cache process.