

Accreditation Returns – Grantium guidance

This information sheet is designed to help you to set up and fill in your Accreditation Return application form on Grantium.

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Key Grantium links and guidance

Grantium home page link

<https://applications.artscouncil.org.uk/frontOffice.jsf>

Grantium guidance

This information sheet includes an overview on how to get set up on Grantium with a User Account and Applicant Profile. You can find more detailed systems guidance on these points within the following online documents: [Accreditation - Getting Started on Grantium](#) and [Completing your application on Grantium](#)

For general Grantium systems guidance please visit: [Grantium support | Arts Council England](#) and download our information sheet: [How to Create and Manage your Account and Applicant profile](#)

For advice and guidance on preparing your Accreditation Return please visit: [Accreditation: How to apply | Arts Council England](#)

Need help with Grantium – password reset or navigating the form?

If you have any queries about logging on to Grantium or navigating your form please contact our Customer Services Team via telephone on 0161 934 4317 (10am-4pm), email at enquiries@artscouncil.org.uk or through a live chat service via our website <https://www.artscouncil.org.uk/about-us/contact-us>

Please quote your Applicant Profile number beginning with 5- / Project Number beginning ACCR- as it will make it easier for us to find your application.

1. Getting started on Grantium: setting up a personal User Account and Applicant Profile

This section provides an overview of getting set up on Grantium.

Creating a personal User Account

To log on to [Grantium](#) for the first time you'll need to create a personal **User Account**. This is unique to each individual user and acts as your personal signature. Your User Account log on details should not be shared with anyone.

To create a personal User Account, go to the [Grantium home page](#) and click on **Create Profile**.

- Please note all fields marked with an asterisk (*) are mandatory.
- On the **User Account** screen you must **enter your real first and last names**. (You can choose your own **User Name** lower down this screen.)
- Please note that any notifications from Grantium will be sent to the email address you enter here linked to your User Account.
- Click **Save** to complete.

Setting up, locating or updating your organisation's Applicant Profile

On Grantium an **Applicant Profile** represents your **museum or art gallery, or a museum service**. (For further information on setting up applications for individual sites that are part of a [museum service please see the section below](#)).

In order to set up and work on your Accreditation Return application, your personal User Account needs to be linked to your organisation Applicant Profile.

All Users linked to an Applicant Profile will receive email notifications about that applicant's ongoing projects, for example if we require further information.

If you are the only User linked to your organisation profile and leave your role, please ensure a colleague sets up a User Account and gets linked to the Applicant Profile.

If your organisation does not have an existing Applicant Profile

You will need to create one as you set up your Accreditation Return application form. Please see [Section 2 Starting a new Accreditation Return](#) for details.

If your organisation already has an Applicant Profile that you don't have access to, please contact the profile administrator to request your personal User Account be linked to the existing profile. Please do not create a duplicate applicant profile for your organisation.

If your organisation has an Applicant Profile that you have access to, please review and ensure all details up to date, with the correct governing document uploaded

Editing the Applicant Profile:

Please note that the Accreditation award decision letter will be addressed to the person listed as the main contact within your organisation applicant profile on the Contact Information screen. To update the main contact within the Applicant Profile [please see the instructions below](#).

If you need to edit other areas within your Applicant profile, please follow the instructions on page 15 Appendix 1 of the [Completing your application on Grantium](#) guidance.

More information on filling in your profile can be found in the online guidance [Accreditation - Getting Started on Grantium](#).

Setting up a profile for sites managed by a museum service

We offer Accreditation awards to museum sites rather than services or collections. If you belong to a group of museums operated by a corporate body, such as a local authority service, then you will need to submit a separate Return application

for each individual museum.

You can choose to either use one Applicant Profile for the main body (e.g. the museum trust) to submit the application forms for each site, or you can set up an Applicant profile for each individual site.

We understand that there will be some duplication of policy and planning documents across the service. Where you share documents with other museums in the group, you can nominate one site as the lead museum (e.g. the largest by budget or visitor number, or whatever works best for your service), and upload the shared policy documents to that particular application form. Then when other museum sites are asked to upload a mandatory shared document again they can just cross-reference the attachment uploaded on the lead site e.g., upload a Word document saying – ‘The following requirements / documents are attached to application reference ACCR-XXXX for XXX museum’.

For information on uploading documents please see the [Required Attachments screen section](#).

2. Setting up your Accreditation Return application form

This section gives an overview of the steps involved in starting your Return application form. The process is slightly different depending on whether or not you have an existing Applicant Profile. For more detailed guidance on setting up an application, please see our information sheet [Accreditation - Getting Started on Grantium](#)

Make a note of your application form Project Number beginning ACCR-

This will help you locate your application form to continue working on it next time you log in. If you need to contact us with a query about your application, please quote the Project Number.

To begin a new application form:

Log into your [Grantium](#) personal User Account. Click on **Browse Programmes** in the left-hand menu. Find the **Accreditation Scheme** in the list and click on the **View** icon. On the next page, read the text and then click **Apply Now**.

When you get to the **Applicant Details** page, what you do next will depend on whether your organisation already has an applicant profile or not.

If your organisation has an existing Applicant Profile (and your User Account is linked to it)

- Select the relevant Applicant from the **dropdown at the top of the page** and click **Save & Next**.
- You will then see a screen which gives you the option review your applicant profile. You can do this now or come back to it later (For instructions on how to edit your profile, please see Appendix 1 of the [Completing your application on Grantium](#) guidance). Click **Next**.
- You'll be asked to enter a Project Name (e.g. The X Museum, AN123, Return 2024). Giving it a clear name will help you to find it later. Click **Save & Next**.
- You will now see the **introduction** page of the application form.
- On the left-hand side you will see your Project Number beginning **ACCR-**.
- **IMPORTANT – make a note of your Project Number beginning ACCR -** This will help you [locate your application form next time you log in](#). If you need to contact us with a query about your application, please quote the Project Number as it will make it easier for us to find your application.
- You can then follow the instructions in this document, starting at [Navigating the application](#)

If your organisation does not currently have an Applicant Profile

- Go to the **create a new applicant section** on the bottom half of the screen.
 - Select Applicant Type: Organisation
 - Type your organisation name in the Applicant name field.
- Make a note of your eight-digit Applicant Number beginning 5XXXXXXX.
- Press **Save & Next**

- Now **fill in all mandatory sections of the Applicant Profile** (all fields marked with an Asterisk* are mandatory).
- Once you've filled in in all sections of the Applicant Profile and clicked **Next** to proceed, then add your **Applicant Project Name** (e.g. The X Museum, AN123, Return 2024).
- Press **Save & Next** and you will now see the **introduction** page of the application form.
- On the left-hand side you will see your Project Number beginning **ACCR-**.
- **IMPORTANT – make a note of your Project Number beginning ACCR -** This will help you [locate your application form next time you log in](#). If you need to contact us with a query about your application, please quote the Project Number as it will make it easier for us to find your application.

It can take up to 10 working days for your organisation applicant profile to be validated. **When you receive an email notification confirming that the applicant profile has been validated, you can then follow the rest of the instructions in this document**, starting at [Locating your application form](#)

3. Locating the Accreditation application form you previously set up

This section of the guidance begins at the point where you have already created an Applicant Profile and set up an application form beginning with reference ACCR-.

To access the application form you have previously set up:

Log on to [Grantium homepage](#), then click on **Submissions** in the left-hand menu.

Next go to the 'Applicant' dropdown at the top left of the screen and make sure your correct organisation Applicant Name is selected.

Click on Clear Filters so you can see all activity against this profile.

Look for your Accreditation **Project Number beginning ACCR-**, step name '**Application**'.

To open the application form **click on the orange folder icon** on the right-hand side of the row.

4. Navigating the Accreditation Return application form

Once you have your application form open (see above), on the left-hand side of the screen you will see the **Application Submission** workflow. This lists all the sections that you need to fill in, page by page.

Please remember to **complete the application form screens in order**, as the answers you provide will determine which subsequent questions and pages will open up to you.

Don't use your browser Back and Forward buttons

Navigate back and forwards by using Grantium buttons and the menus. when you fill in each page there will be a **Save and Next** button which will take you to the next page. If you try to use your browser buttons you may need to restart Grantium.

Mandatory fields - All fields marked with an **Asterisk*** are mandatory. These fields must be completed before you can submit your profile or form.

Completing the application form page by page

Introduction screen to Address information screen

Application submission

The first page of the application form is an **Introduction** with links to guidance documents. Once you have read through this page, click **Next**.

Introduction

Applicant details

Financial background

Address information

Contact information

Museum Details

The next three pages are pulled directly from your **Applicant profile**. You can review the information and click **Next** for each of these pages. If you need to edit any of this information, this cannot be done from here.


Please note that some fields within your Applicant Profile are locked after validation. If you wish to amend your applicant name, organisation legal name, legal status, governing document, company number or charity number please email grant.management@artscouncil.org.uk

If you need to edit any other areas within your Applicant profile, go to your Grantium homepage and click **Applicants** in the left-hand menu. Follow the instructions in Appendix 1, page 15 of the [Completing your application on Grantium](#) guidance.

Contact information screen

Any contacts you have labelled as 'Museum Primary contact' or 'Museum Senior contact' will pull through directly from your applicant profile to the Contact Information screen.

Please note – **your Accreditation decision letter will be addressed to the person listed as the Main contact within your Applicant Profile**. If you need to update the main contact within your Applicant Profile, [please follow the instructions below](#).

You can add additional contacts to the Application form Contact Information screen by clicking on the plus icon to the top left of the screen. 

Please note that on this screen one of the contacts need to be labelled as a Senior contact. To update the contact type, click on the magnifying glass icon against one of the contacts and update the * Contact type dropdown to **Museum Senior Contact**.

You can now start the main body of the application. Remember all fields marked with an **Asterisk*** are mandatory.

Museum Details screen

Name of museum (this name will appear on your award certificate) – please fill in the museum site name (the operating name) rather than the governing body name.

UK **National museums** are governed by national legislation and directly receive Government funding. **Nationally-styled** is a marketing approach which claims nationally significant reach and meaning and uses one of the nationally styled names. For further information please see page 15 of the [Accreditation Guidance](#).

When you've filled in all mandatory fields, and updated all the information you need to, press **Save & Next**

Details about your application


According to the guidance, how have you classified your museum? See pages 11 - 15 of the [Accreditation Guidance](#) for information on museum classification.

Select the type of application as **Return Application**

When you've filled in all mandatory fields, and updated all the information you need to press **Save & Next**

Required actions/ areas for development screen

This is where you should report against your areas for improvement/ development. These will be outlined in your latest outcome letter.

To complete this section, you will need to click on the **add** icon: 

You will need to copy and paste each Area for Improvement from your award letter into Grantium. Each Area for Improvement needs to be entered as a separate item. You will also fill in the corresponding evidence text box telling us about the progress you have made against each Area.

Click **Next** to move on to the next page.

Please note there is a place for you to upload attachments later in the application if you wish to provide more information than the text boxes allow.

Returns checklist screen

This is a list of requirements in the Accreditation Standard. **Each requirement ticked within the checklist will open a corresponding section within the application form**

To comply with the Accreditation scheme, your policies and plans should be reviewed every five years. We appreciate a lot may have changed since your last Return. We'd therefore **expect you to tick most if not all boxes on the Returns Checklist**. On the **Required attachments** page you will also need to attach any documents we require from you based on the sections and questions you answer.

For further details please see our [Accreditation Returns information sheet & FAQs](#).

On the Returns Checklist screen there are eight requirements which are already ticked. Then **as a minimum there are four additional requirements which you will need to tick within the Checklist**:

1.2 An appropriate constitution

1.3 A satisfactory structure for your governance and management

3.1 Secure occupancy of all premises containing collections

7.2 An access plan

If you've undergone a major change since your last Accreditation award (e.g. a change in legal entity or site location) and haven't been through the Significant Change Review process, then you will need to update us against all 21 Accreditation Standard requirements. Please make sure tick all boxes on the Returns Checklist screen.


When you have ticked all the relevant requirements you'll report on, press **Save & Next**

Requirement screens

Work through each Requirement section, filling in all mandatory fields on each page. (Note - the answers you provide to some questions will inform which documents you will later need to upload to the **Required attachment** screen).

When you've filled in all mandatory fields on each screen, press **Save & Next** to move on to the next section.

Requirement 3.1

To tell us about **all premises where you hold collections** you will need to click on the add icon 

In the Freehold/Proprietor details screen, enter the relevant answers. If you only have one premises to detail, then click **Save & Back to List**. If you have more than one, then click **Save & Add Another**, repeating this process until you have completed an entry for every premises where you hold collections.

Then click **Save & Back to List**. Click **Next** to move on to the next page.

Make sure your security reviews, emergency plans and other policies and plans cover all the locations where you hold collections (including off-site).

Additional Information

If you'd like to tell us about any significant achievements at your museum since your last submission, please share them with us on this screen.

Governance document screen

Your governance document is pulled onto this screen directly from your **Applicant profile**. You can review the document by clicking on the **magnifying glass** icon:



If the governing document is still your current one you don't need to do anything.

If the governing document is not your current one, you will need to upload your governing document to your applicant profile. To do this please email the governing document to grant.management@artscouncil.org.uk In your email

request please make sure to reference your applicant profile name and number beginning 5XXXXXXX.

Please do not submit the application until the updated governing document is showing on this screen.

Required Attachments screen

As you worked through the Requirements screens you will have ticked boxes to confirm that you will upload an attachment as part of that question.

As a result, on the Required Attachments screen, under the heading **Required attachment name**, you will now see a **bespoke list of the documents you need to upload**.

You will need to upload a document for each Required attachment on your list. **If you have combined the documents then you will need to upload that same document multiple times against each requirement name and number on your list.** When you upload a document to meet a specific requirement then the white check box to the right of the requirement name will be ticked and greyed out.

We suggest you either **make a note of the required attachment names in your list, take a screen shot of the list or download this section as a PDF to reference.** You can then refer to the list as you upload documents on the following screens.

(To download a PDF copy of this section with your required documents list, go to the bottom of the left-hand menu and click **Export to PDF**. Click on **Unselect All Formlets** and then click in the box next to **Required attachments** (NOT Required attachments --> attachment details). Then click **Export to PDF**. Click **Back** to return to the attachments page.)

Top tip: Set up a folder with all your required documents saved as the appropriate Requirement number and name. Everything you need is then in one place for ease for uploading.

Required attachments for individual sites managed by a museum service.

Where you share documents with other museums in the group, you can nominate one site as the lead museum (e.g. the largest by budget or whatever works best

for your service) and upload the shared policy documents to that particular application form.

Then on applications for the other museum sites you can cross-reference the attachment uploaded on the lead site e.g., upload a Word document saying – ‘The following requirements / documents are attached to application reference ACCR-XXXX for XXX museum’.

Uploading the Required Attachments

We can accept attachments in the following formats and up to 10mb each: PDF, MS Word, MS Excel, MS PowerPoint, and jpeg

You need to upload your documents one at a time. To attach a document click on a blue Attachment number hyper link:

Required attachments:						
Required attachment name						Attached
Forward/ business plan (Requirement 2.1)						<input type="checkbox"/>
Signed approval or evidence of published approval for approved forward/ business plan (Requirement 2.1)						<input type="checkbox"/>
Audited, signed and approved accounts for the last two available financial planning years (Requirement 2.2)						<input type="checkbox"/>
Collections care and conservation policy (Requirement 6.1)						<input type="checkbox"/>
Signed approval or evidence of published approval (Requirement 6.1)						<input type="checkbox"/>

Document Type	Required?	Document description	Attachment type:	Date attached	Download	Delete
Attachment 01	No	--	---	No attachment		
Attachment 02	No	--	---	No attachment		
Attachment 03	No	--	---	No attachment		
Attachment 04	No	--	---	No attachment		
Attachment 05	No	--	---	No attachment		
Attachment 06	No	--	---	No attachment		
Attachment 07	No	--	---	No attachment		

This next page is where you upload your document. Go to the **Attachment type** dropdown (see screenshot below) and select the relevant Requirement name that you wish to upload a document for.

Please pay particular attention when you select the **Attachment type**. This list contains every possible kind of attachment which could be asked for in any kind of Accreditation application. Some attachment types have very similar names and requirement numbers. If you have combined documents then you'd need to upload that multiple times once for each requirement number.

Attachment Details

* Document description:

* Attachment type: -- select --

* File Name: No file chosen

Document Type: Attachment 04

Maximum Size: 10 MB

Allowable Formats: jpg, xls, xlsx, jpeg, pdf, doc, docx, pptx, ppt

Instructions:

Once you have uploaded a document, click **Save & Back to List**.

When you **attach a document against a particular Requirement** name and number in the Attachment type dropdown, you will then see that **a grey tick will appear against that document on the Required attachments list page:**

Required attachments:	
Required attachment name	Attached
Forward/ business plan (Requirement 2.1)	<input checked="" type="checkbox"/>
Signed approval or evidence of published approval for approved forward/ business plan (Requirement 2.1)	<input type="checkbox"/>
Audited, signed and approved accounts for the last two available financial planning years (Requirement 2.2)	<input type="checkbox"/>
Collections care and conservation policy (Requirement 6.1)	<input type="checkbox"/>
Signed approval or evidence of published approval (Requirement 6.1)	<input type="checkbox"/>

Repeat this action for every attachment you need to upload. When complete you should see a tick against every required attachment.

Additional Attachments screen

On this screen, please upload any additional documents you have not already included. These can include: Audience development plan, Learning plan, Access plan, Marketing plan, Collection management framework, Any other documents you want to share with us.

Repeat this process until you have ticks next to all your required attachments in that list. Then click **Save & Next** at the bottom of the page.

Nationally styled attachments

Additional questions to be completed by National museum or a nationally-styled museum applicants only. You can download a reference copy of the additional questions for National and nationally-styled museum here.

Monitoring information screen

Your monitoring information is pulled directly from your **Applicant profile**. If you need to change any of this information, this cannot be done from here, you need to edit it in your Applicant profile. For instructions on how to do this, please see Appendix 1 of the [Completing your application on Grantium](#) guidance. If you have any queries about updating your monitoring information page please contact our [Customer Services team](#).

Submission Summary screen – submitting your application form

The last page to complete is the **Submission summary**. If you have a green tick next to each item in the list, then it will allow you to click **Submit**. This will send your application to us for review. We will receive a notification that the application has been submitted.

If you have any **red crosses**, then you have not yet completed that page successfully – the blue hyperlink will tell you the reason it's not complete and will take you back to the right section to amend it:

Submission summary			
Complete	Page	Last Updated	Mandatory
--	Introduction	No Input Required	No
✓	Applicant details	15/05/2019	Yes
--	Financial background	No Input Required	No
✓	Address information	15/05/2019	Yes
✓	Contact information	15/05/2019	Yes
✓	Details about your application	16/05/2019	Yes
✓	Required actions/ areas for development	16/05/2019	Yes
--	Returns checklist	No Input Required	No
✓	Requirement 2.1	16/05/2019	Yes
✓	Requirement 2.2	16/05/2019	Yes
✓	Requirement 3.2	16/05/2019	Yes
✓	Requirement 3.3	16/05/2019	Yes
✓	Requirement 4.2	16/05/2019	Yes
✓	Requirement 5.1	16/05/2019	Yes
✓	Requirement 6.1	16/05/2019	Yes
✓	Requirement 7.1	16/05/2019	Yes
✓	Governance document	15/05/2019	Yes
✗	Required attachments	Please Complete	Yes
--	Additional Attachments	No Input Required	No
✓	Monitoring information	15/05/2019	Yes
✓	Declaration	16/05/2019	Yes

Notes:

- [Please attach all required Accreditation attachments. Click here to return to Required attachments form.](#)

5. What happens next?

When you submit your Return application, you'll receive an **automatic email notification** via Grantium confirming we've received it. If you don't receive a notification please check your junk mail folder.

From the date you submit your Return application **it can take up to 6 months to reach a decision.**

An Assessor will carry out an initial review of your application to determine if they need any more information from you, or whether they have everything they need to complete the assessment.

If the Assessor needs to request more information from you, then this would be sent through Grantium. The notification will be sent to all User Accounts linked to the Applicant Profile.

You would need to complete the Request for Information step on Grantium. You'd find the step in the **Submissions** menu – in the same place where you would find an application that you had started. You would click on the **orange folder** next to the **Request for information** step against your Accreditation Project Number beginning ACCR-

You would then work through the pages in the same way as you did in your application. The **Submission Summary** at the end would tell you if you have completed all the sections correctly. If you have, you will have all green ticks and be able to click **Submit**.

6. Who is the award outcome letter addressed to and how is it issued?

The letter is issued to people with a User Account on Grantium linked to the organisation applicant profile

When the outcome decision letter is ready for review Grantium will issue an email notification to **anyone with a personal User account linked to your organisation Applicant profile**. The notification tells the User that they can log on to Grantium to view the letter.

The decision letter itself is **addressed to the person listed as the 'Main contact' within your organisation Applicant profile** on the Contact Information screen.

How can I update these details?

For guidance on managing User Accounts and updating your organisation applicant profile please see our information sheet: ['How to Create and Manage your Account and Applicant profile'](#)

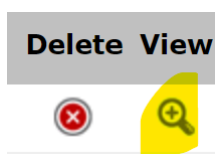
- Please see page 16 for instructions on How to update the details in your Applicant Profile.
- The section starting on page 19 has guidance on linking or unlinking a User to an applicant profile.

Updating the main contact within your organisation applicant profile:

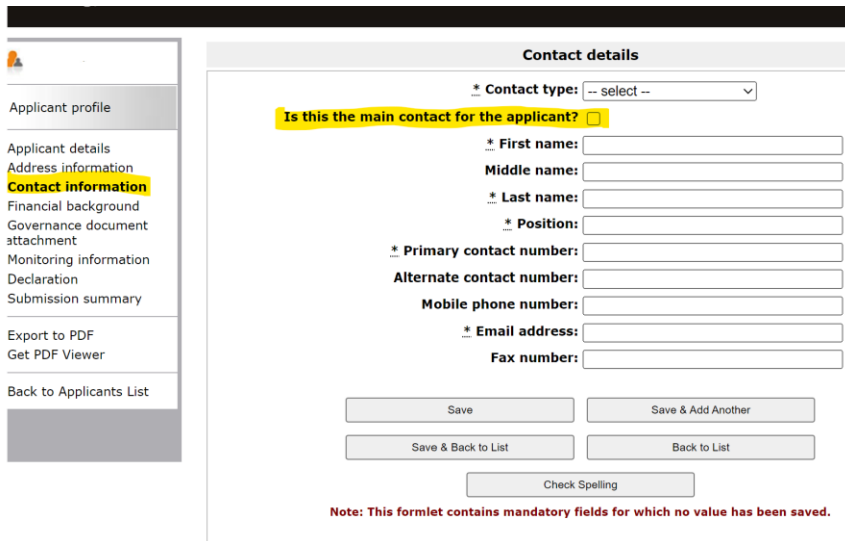
The award offer will be addressed to the person listed as the Main contact within your **organisation applicant profile** (beginning 5XXXXXXX), on the **Contact Information screen**.

To review and change the main contact within the profile:


- Log on to the [Grantium homepage](#) and click **Applicants** in the left-hand menu.
- Then go to the 'Applicant' dropdown at the top left of the screen and make you're your relevant organisation applicant name is selected
- Next click into the **orange folder icon** on the far right-hand side of the row.
- On the left-hand side of the page, you will now see a list of the screens within the Applicant profile.
- Before the system will allow you to make any changes, you need to **go to Submission Summary and click the Edit button**. This opens your Applicant profile back up for editing.
- Go to the **Contact Information** Screen:
- To make an existing contact the main contact, click on the magnifying glass icon to the far right of their name.

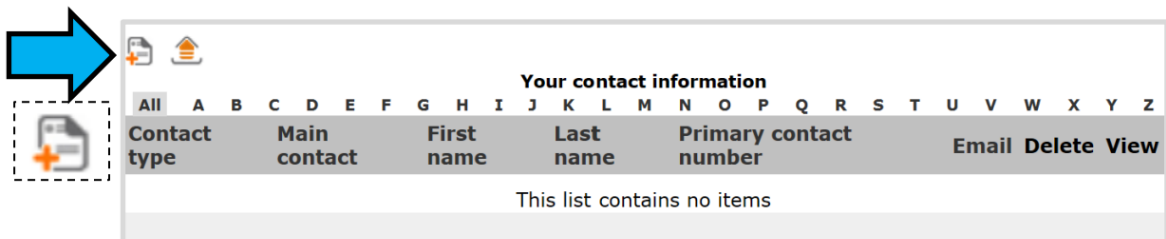


- Then inside the Contact details screen tick the box next to ‘Is this the main contact for the applicant?’



- Alternatively you can create a new contact

To add a contact, click the **add** icon . This opens the **contact details** screen.



- Make sure you mark the new contact as the ‘Main Contact’ by ticking the box next to ‘Is this the main contact for the applicant?’
- **Important**
- Once you have made the necessary changes to your organisation applicant profile, go to the Submission Summary screen and click **Complete**.
- This close all sections of the form again and saves the changes you have made.