

Innovation Services Grants Portal

Quick start guide for customers

This quick start guide is designed to get you up and running with our online Grants Portal.
 Please note that what you see onscreen when using the portal may differ slightly from what is shown here.
 If you have any questions about the system you can get in touch with the team by emailing us at fcoperations@mbie.govt.nz

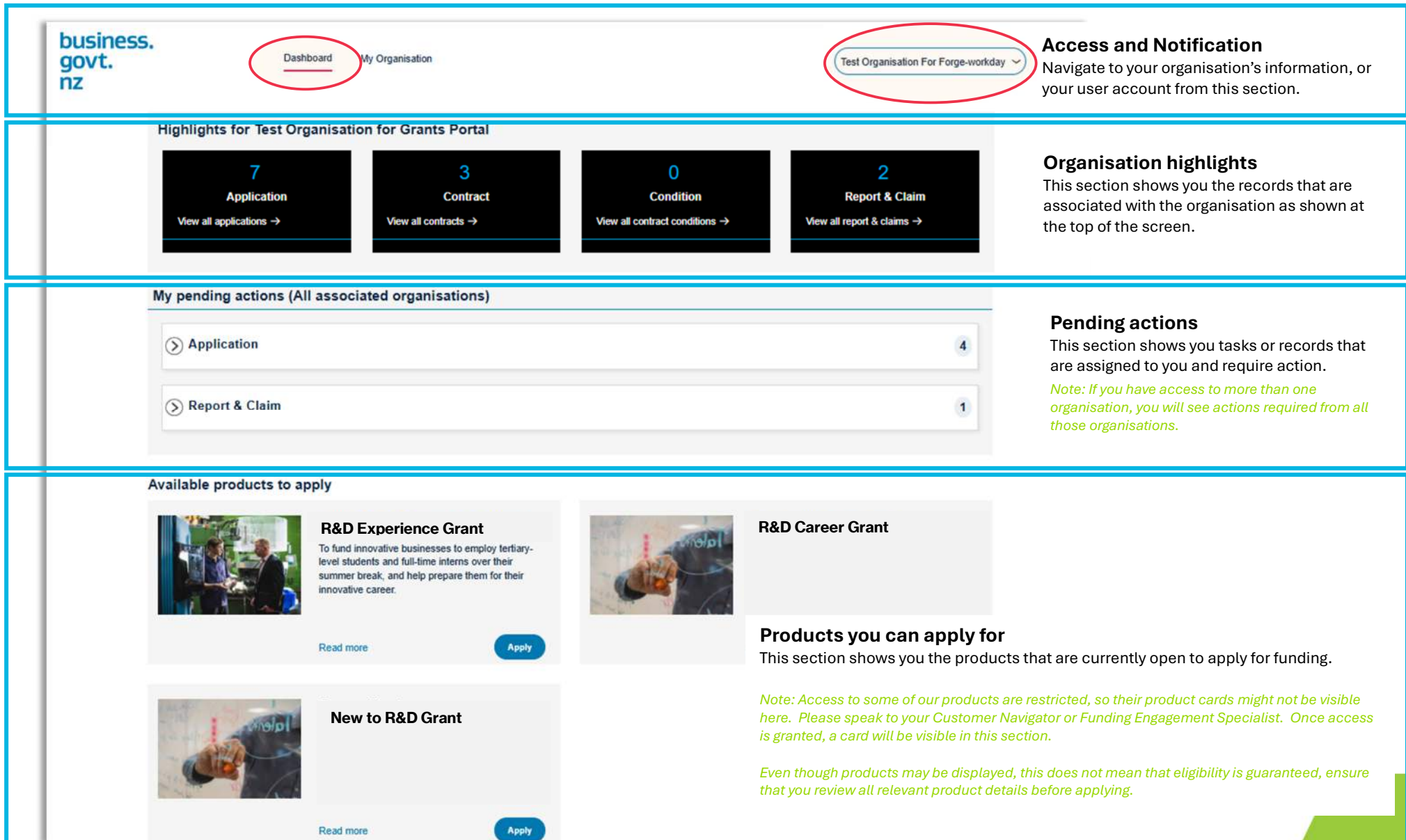
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1. High-level overview of Dashboard section

Log into the Grants Portal and you will see your Dashboard. It provides an overview of key information and actions for your business.



The screenshot shows the Grants Portal dashboard for 'Test Organisation For Forge-workday'. The top navigation bar includes the 'business.govt.nz' logo, a 'Dashboard' link (circled in red), and a dropdown menu for the organisation name (also circled in red). The main content area is divided into several sections: 'Highlights for Test Organisation for Grants Portal' with four cards for Applications (7), Contracts (3), Conditions (0), and Reports & Claims (2); 'My pending actions (All associated organisations)' with a list of 'Application' (4) and 'Report & Claim' (1); and 'Available products to apply' with cards for 'R&D Experience Grant', 'R&D Career Grant', and 'New to R&D Grant'. Each card includes an image, a title, a brief description, and 'Read more' and 'Apply' buttons.

Access and Notification
Navigate to your organisation's information, or your user account from this section.

Organisation highlights
This section shows you the records that are associated with the organisation as shown at the top of the screen.

Pending actions
This section shows you tasks or records that are assigned to you and require action.
Note: If you have access to more than one organisation, you will see actions required from all those organisations.

Products you can apply for
This section shows you the products that are currently open to apply for funding.
Note: Access to some of our products are restricted, so their product cards might not be visible here. Please speak to your Customer Navigator or Funding Engagement Specialist. Once access is granted, a card will be visible in this section.
Even though products may be displayed, this does not mean that eligibility is guaranteed, ensure that you review all relevant product details before applying.

2. Overview of 'My Organisation' section

2.1 Organisation details

business.govt.nz

Dashboard **My Organisation**

Test Organisation For Forge-workday

Organisation User management

Test Organisation for Grants Portal

Organisation type
Non-Company

ANZSIC
test

Funding & Contract Management
FCMOPS

GST number
123-456-789

Organisation code
TOFTQU

Funding Engagement Specialist
FES user

Is the organisation registered for GST?
Yes

Addresses

15 Stout Street, Wellington Central, Wellington 6011

15 Stout Street, Wellington Central, Wellington 6011

Bank account

Account name	Account number	Email for remittance
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Financial

Financial year end	Total revenue (\$NZD excl. GST):	Earnings before interest and taxation (EBIT) (\$NZD excl. GST):	Net profit before taxation (\$NZD excl. GST):	Exports revenue (\$NZD excl. GST):	Total R&D spend (\$NZD excl. GST):	Total staff (FTE):	R&D staff (FTE):
2025/2026	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	0	0

My Organisation > Organisation

You can review and edit the information on your organisation (chosen from the dropdown menu at top right)

The information you can edit is as follows:

- Address details
- Bank account details
- GST number
- Financial information

2.2 User Management

business.govt.nz

Dashboard My Organisation

Test Organisation For Forge-workday

Organisation User management

Test Organisation for Grants Portal

Users that have not logged in for 12 months will be disabled in the system.

Super user

Grant Portaluser Last login —	King Forge Last login —	Queenie Forge Last login 26/05/2026
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My Organisation > User management

Review users who have access to your chosen organisation's records within the Grants Portal

As a super user you can:

- Reset passwords for other users
- Disable users

3. Quick navigation

3.1 How do I start a report and claim?

Highlights for Test Organisation for Grants Portal

7 Application View all applications →

1 2 Contract View all contracts →

0 Condition View all contract conditions →

2 Report & Claim View all report & claims →

1. Click on the contract card

This will take you to the list of your open and closed contracts.

business.govt.nz Dashboard My Organisation Test Organisation for Grants Portal

Open contracts

Contract ID	Contracting organisation	Product	Contract value (GST excl.)	Status	Actions
CONT-109009-N2RD-TOFTQU	Test Organisation For Forge-workday	New to R&D Grant (150)	\$49.20	Active	View more Action
CONT-108299-RDEXP-TOFTQU	Test Organisation For Forge-workday	2025-26 R&D Experience Grant	\$23,160.00	Active	View more Action

2. Select the 'Action' button

Open contracts

Contract ID	Contracting organisation	Product	Contract value (GST excl.)	Status	Actions
CONT-109009-N2RD-TOFTQU	Test Organisation For Forge-workday	New to R&D Grant (150)	\$49.20	Active	View more Action
CONT-108299-RDEXP-TOFTQU	Test Organisation For Forge-workday	2025-26 R&D Experience Grant	\$23,160.00	Active	View more Action

View more Action

- View contract
- Request Report & Claim
- Request variation

3. Select 'Request Report & Claim'

You will be able to select the type of report that you want to create. You will be presented with a series of sections to complete and upload the necessary documentation.

NOTE: You don't have to complete in one sitting, you can save your progress and return at any time. The Report and Claim will be available in your 'Pending Actions' via the Dashboard.

3.2 How do I create an application?

business.govt.nz

Dashboard My Organisation Test Organisation For Forge-workday

Highlights for Test Organisation for Grants Portal

7 Application View all applications →	3 Contract View all contracts →	0 Condition View all contract conditions →	2 Report & Claim View all report & claims →
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My pending actions (All associated organisations)

Application	4
Report & Claim	1

Available products to apply

- R&D Experience Grant**
To fund innovative businesses to employ tertiary-level students and full-time interns over their summer break, and help prepare them for their innovative career.
Read more Apply
- R&D Career Grant**
Read more Apply
- New to R&D Grant**
Read more Apply

Products you can apply for will appear as cards at the bottom of your dashboard. Click on the APPLY button to start an application.

If you have any queries as you work through your application, please contact your Funding Engagement Specialist.

If you wish to start an application for a grant product for which there isn't a card on your Dashboard, please contact your Customer Navigator to discuss the grant and eligibility requirements.

NOTE: You don't have to complete in one sitting, you can save your progress and return at any time. The saved application will be available in your 'Pending Actions' via the Dashboard.

3.3 How do I continue to work on an application or address rework requirements?

The screenshot displays the 'business.govt.nz' Grants Portal. At the top, there are navigation links for 'Dashboard' and 'My Organisation', and a dropdown menu for 'Test Organisation for Grants Portal'. Below this is a 'Highlights for Test Organisation for Grants Portal' section with four cards: 'Application' (7), 'Contract' (2), 'Condition' (0), and 'Report & Claim' (2). Each card has a 'View all...' link. Below the highlights is a section titled 'My pending actions (All associated organisations)'. A red circle labeled '1' highlights the 'Application' dropdown menu. Below it, a table lists pending actions. A red circle labeled '2' highlights the 'View more' and 'Go' buttons for the first application entry.

Application	Contract	Condition	Report & Claim
7	2	0	2
View all applications →	View all contracts →	View all contract conditions →	View all report & claims →

My pending actions (All associated organisations)			
Application 4			
PROP-109126-N2RD-TOFTQU In progress			
Contracting organisation Test Organisation For Forge-workday	Product New to R&D Grant (150)	Funding amount (GST excl.) \$250,000.00	View more Go
Application title MBIE Testing for withdraw process			

1. Expand the Application pending action section

This will show you any applications that you have started, but not yet submitted OR applications that have been returned for rework.

2. Click on 'Go'

This will take you into the application where you can continue to work on OR address any points raised for rework. *(See section 4 for further guidance around rework).*

3.4 How do I submit information to satisfy a condition?

The screenshot displays the 'Highlights for Test Organisation for Grants Portal' section with four cards: Application (7), Contract (2), Condition (1), and Report & Claim (2). Below this is the 'My pending actions (All associated organisations)' section. The 'Contract condition' section is expanded, showing a table with one entry: 'CONT-109009-N2RD-TOFTQU-CC1'. The entry includes details for the contracting organisation, product, condition type, and due date. A 'View more' button and a 'Go' button are visible next to the entry. A red circle highlights the 'Contract condition' section header, and another red circle highlights the 'View more' and 'Go' buttons.

1. Expand the contract condition pending action section
This will show you all the conditions that are awaiting action and their status.

2. Click on 'Go'
This will take you into the area where you can upload and provide comment on the contract condition.

3.5 How do I withdraw an application (or claim)?

The screenshot shows the 'business.govt.nz' dashboard. At the top, there are navigation links for 'Dashboard' and 'My Organisation', and a dropdown menu for 'Test Organisation for Grants Portal'. Below this is a 'Highlights for Test Organisation for Grants Portal' section with four cards: 'Application' (7), 'Contract' (2), 'Condition' (0), and 'Report & Claim' (2). Each card has a 'View all...' link. Below the highlights is a section titled 'My pending actions (All associated organisations)'. A red circle labeled '1' highlights the 'Application' section, which shows a list of applications. One application is highlighted with a red circle labeled '2': 'PROP-109126-N2RD-TOFTQU'. This application is in 'In progress' status and has a 'Go' button next to it.

1. Expand the Application pending action section

This will show you any applications that you have started, but not yet submitted OR applications that have been returned for rework.

2. Click on 'Go' on the record required

The screenshot shows the details page for the application 'PROP-109126-N2RD-TOFTQU'. The page has a blue header with the application ID and a table of details. A red circle labeled '3' highlights the 'Actions' dropdown menu, which contains options for 'Withdraw', 'Update details', and 'Close'. Below the details table is a progress bar with several steps: 'Key contact', 'Bank account', 'Background and compliance', 'Eligibility', 'Financial information', 'R&D Capability development', 'R&D Activity', 'Costs and Plan', and 'Review and Declaration'.

3. Select the Action drop down

Select 'Withdraw'

You will be asked to provide a reason for why the record is being withdrawn.

4. Rework process

4.1 How do I make changes to my application (or claim) that has been returned to me and needs amending?

When rework of an application or a report and claim is required, you will be notified by email. The email does not provide the detail of what has been identified as needing amendment, you need to log into the online portal to review.

The screenshot shows the 'business.govt.nz' dashboard for a 'Test Organisation for Grants Portal'. It features a 'Highlights for Test Organisation for Grants Portal' section with four cards: '7 Application', '2 Contract', '1 Condition', and '2 Report & Claim'. Below this is a 'My pending actions (All associated organisations)' section. Under the 'Application' tab, two application cards are listed. The first card, 'PROP-109126-N2RD-TOFTQU', is in 'In progress' status. The second card, 'PROP-109204-RDEXP-TOFTQU', is also in 'In progress' status and is circled in red with a '1' next to it. The 'View more' link for this application is circled in red with a '2' next to it.

Application ID	Contracting organisation	Product	Funding amount (GST excl.)	Status
PROP-109126-N2RD-TOFTQU	Test Organisation For Forge-workday	New to R&D Grant (150)	\$250,000.00	In progress
PROP-109204-RDEXP-TOFTQU	Test Organisation For Forge-workday	2025-26 R&D Experience Grant	\$57,900.00	In progress

- Expand the application pending action section
- Click on 'Go'

The screenshot shows the 'Test Organisation for Grants' page on business.govt.nz. At the top, there is a navigation bar with 'Dashboard' and 'My Organisation' links, and a 'Test Organisation for Grants' button. Below this is a blue header bar for the application 'PROP-109204-RDEXP-TOFTQU' with an 'Actions' dropdown menu. A table below the header provides details: Organisation (Test Organisation For Forge-workday), Product (2025-26 R&D Experience Grant), Title (Testing MBIE sharepoint), Number of student (5), and Funding amount (\$57,900.00).

The main content area is a table with two columns: 'Section' and 'Reason'. It lists three sections: 'Application summary' (Reason: Please update the application title), 'Financial information' (Reason: Provide 2025/26 Financial information), and a partially visible 'Application summary' section. A red circle labeled '3' highlights the 'Application summary' row. Below the table, there are expandable sections for 'Application summary' and 'Financial information', with a red circle labeled '4' around the expandable headers. At the bottom right, there are 'Save' and 'Submit' buttons, with a red circle labeled '5' around the 'Submit' button. A 'Cancel' button is also visible at the bottom left.

3. Feedback from your Funding Engagement Specialist (FES)

This area will display the section(s) where amendments are required and the comments from your FES

4. Expand the sections that require rework

Click on the circular arrow buttons so you can make the required edits.

5. Once you've made all the required edits, click the 'Submit' button

You can save and exit, and return later to complete and submit.

NOTE: Ensure that you have expanded each section before you submit.

5. Uploading documents

5.1 What types of documents can I upload?

Extension	Description
doc, docx	Microsoft word document
pdf	Adobe portable document format (easy to share and print)
xls,xlsx	Microsoft excel spreadsheet
txt	Text file document
jpeg, jpg, png	Image file format - picture or photo file

5.2 File naming conventions and file size limited

- File size must be under 20 MB.
- Keep the file name simple, but meaningful to what is being uploaded
- Don't use these characters in your file names:
 - hashtags (#)
 - commas (,)
 - semi colons (;)
 - colons (:)
 - plus-signs (+)
 - dashes or hyphens (-)
 - exclamations marks (!)
 - question marks(?)

6. Status descriptions

6.1 Application statuses

Customer status	Customer portal location	Description
In-progress	Pending items - Application	An application has been created but isn't yet complete. It's either: <ul style="list-style-type: none"> newly created and not yet ready for submission to be considered for funding OR has been returned for rework, with advice from your Funding Engagement Specialist as to what needs to be addressed
Submitted	Application card (Open)	Your application has been submitted. Your Funding Engagement Specialist will assess your application against the applicable grant criteria.
Withdrawn	Application card (Closed)	An application can be withdrawn up to the point where you click the final Submit button. You will be asked for a reason for withdrawing, this is captured for reporting purposes. You can't edit or resubmit a withdrawn application, but it can be viewed.
Declined	Application card (Closed)	The application has been declined for funding. You can't edit or resubmit
Approved	Application card (Closed)	The application has been approved and will be proceed to the next stage (contracting). You can't make edits once the application is approved.

6.2 Contract statuses

Customer status	Customer portal location	Description
Contract setup	Contract card (Open)	Your application has been approved, and the contracting process has begun. Your Operations Officer is preparing the notification of approval (if applicable)
Notification for Acceptance	Pending items - Contract	The notification of approval has been sent out, outlining the details of the funding. This is required to be accepted to proceed to contracting. Request for changes, such as amending the contract dates can still be submitted.
Notification changes requested	Contract card (Open)	Changes have been requested following receipt of the notification of approval, e.g. asking to move start date forward by 2 weeks. Your Operations Officer will review and determine if this can be accepted.
Precontract conditions	Pending items – Contract conditions	Terms of approval have been accepted and now there are precontract conditions to be satisfied prior to a formal funding agreement being sent.
Funding Agreement in progress	Contract card (Open)	Your Funding Agreement is being drafted by your Operations Officer and going through internal review process.
Funding Agreement to be signed	Contract card (Open)	Your Funding Agreement has been sent via email (with links to Adobe e-sign) to be electronically signed.
Active	Contract card (Open)	Your Funding Agreement has been signed by all parties. You now have access to the Report and Claim module.
In-Variation	Contract card (Open)	You have requested a variation and is with your Operations Officer for review
On-Hold	Contract card (Open)	A change event has occurred and while we work through the details with you, your contract is placed in a hibernation state – no actions can be taken.
Terminated	Contract card (Closed)	The contract has been closed prior to the end date, either as advised or as a result of a change event. No further actions can be taken, i.e. no further claims can be made.
Matured	Contract card (Closed)	The contract has reached its end date. No further payments will be made, and variations cannot be requested. A contract will automatically mature after a set period (as stated in your funding agreement) following the contract end date.

6.3 Report and claim statuses

Customer status	Customer portal location	Description
In progress	Pending items – Report and Claim	A report and claim has been created and is still in the process of being completed. It's either <ul style="list-style-type: none"> newly created and not yet ready for submission OR has been returned for rework, with advice from your Operations Officer on what needs to be addressed OR you have an overdue condition and you are unable to submit a claim until this has been satisfied.
Submitted	Report and Claim card (Open)	Your report and claim has been submitted and is now with your Operations Officer for review
Withdrawn	Report and Claim card (Closed)	Up until submitting your report and claim, you can decide to withdraw it (e.g. if you started a progress report instead of a final report)
Declined	Report and Claim card (Closed)	MBIE have determined that the report and claim does not meet requirements and therefore can't be paid (please note that we would work with you closely prior to finalising this status).
Approved	Report and Claim card (Open)	Your report and claim has provided all the necessary information and audit requirements have been met. A payment will be scheduled for the next available payment run (where applicable).