



# SBRI Healthcare

## Applicant and Portal Guidance

These Guidance Notes complement the Invitation to Tender (ITT) document, the Challenge Brief and the Template Application form, and are designed to help you complete your application to the SBRI Healthcare Programme.

### Funding prerequisites

The following funding prerequisites apply to all applications and will be considered by the funding Panel:

1. A commitment to contributing to the overall carbon neutral strategy for the NHS.
2. A commitment to involve members of the public and patients in the design and management of the research, evaluation or study.
3. A commitment to actively engage in tackling healthcare inequalities, and in supporting diversity and inclusion, by including communities where the proposed innovation will make the biggest impact.

### Guidance for completing your application on the Portal

These notes should be read alongside your application as they are designed to help you provide the information required.

Please keep the use of acronyms to a minimum. Only use acronyms where a term is mentioned frequently throughout the proposal. If you choose to use an acronym, do not assume that the reader knows what it means, and be sure to define it, bearing in mind that individual sections of the application may be read separately during the selection process.

In order for your application to be accepted, you must submit the minimum required information. This information includes all mandatory fields from the application form (as indicated with a red asterisk next to questions). If you do not complete this information, you will not be able to submit your application.

We ask that all participants in the application (Team Members, Sub-Contractors, and Clinical Partners) have approved accounts on the Research Management System so that they can be added to the application form. Please ensure you leave enough time for this.

If you do not have all the answers you need to fully complete the application, you may save your progress using the 'Save and Close' button and return to the application process at a later date.

Applicants are expected to respond to the specific challenge, providing details as to how their innovations

meet the brief and support all NHS net zero ambitions. Considerations on the following topics are expected as part of the proposal:

### **Supply chain**

- Consideration should be given to upstream and downstream implications of carbon emissions management activities.
- An outline of your approach to developing a carbon reduction plan in line with the NHS Supplier Roadmap. Products sourced and manufactured in the UK are particularly encouraged.

### **Carbon reduction**

- A detailed methodology and/or framework to outline qualitative and quantitative approaches to assess any reduction in carbon emissions resulting from the innovation.
- An environmental qualitative assessment of the proposed innovation from the 'extraction and upstream production' stage to 'end-of-life' stages.
- Identification of carbon hotspots and key opportunities for carbon emissions reductions associated with the innovation and the implementation of the innovation in the NHS. A clear assessment of areas of dependency or areas requiring greater transparency would be beneficial.
- Evidence of where benefits of the innovation may impact the potential carbon footprint elsewhere.

*NB:* The impact of reducing carbon emissions in one part of the system should be carefully considered so that it does not increase emissions and resource requirements in other parts of the system.

### **Digital innovations**

Applicants are expected to clearly articulate digital innovations' design towards low carbon model and climate change resilience in healthcare settings and health and social care use. Digital innovations should demonstrate:

- How you have considered and minimised the carbon emissions associated with running the digital technology, including cloud server / provider chosen.
- How you have included risk factors and challenges associated with climate change / climate events (for example heatwaves, floods, and other climate events) for safe and efficient running of the digital innovation

We will be requiring all digital products and innovations to use standardised net-carbon impact assessment process and climate risk tool to ensure a consistent process is used to assess and compare extra carbon costs and reductions created by the innovation.

If any information related to current net-carbon impact and quantification is available, sight of the methodology or tool used to assess the impact and carbon emissions is required. However, a standardised methodology will be applied to funded digital innovations.

Guidance on the individual sections of the application form is provided in the following sections.

## Section 1: Application Summary

Information entered into this section provides a summary of your application.

### Application title

Please provide the title for the project. This should be descriptive, concise and contain keywords relevant to the project. Any abbreviations should be spelled out in full.

### Sub-challenge selection

Please select the appropriate sub-challenge addressed by your innovation.

### Host organisation

Please name the organisation that will be responsible if the project is funded. Including management of the funding, project deliverables and arising intellectual properties.

### Contract duration

Enter the length of the desired SBRI Healthcare contract as a number of months (6 to 12 months maximum).

### Total contract cost (NET)

This will be auto-populated based on the information provided in Section 6.

- The funding limit for this competition must be between £50,000 and £100,000 excluding VAT.

### Type of innovation

Please choose the most appropriate description of the innovation using the dropdown list provided. If "Other" is selected, please provide a short description of the innovation.

### Technology readiness level (TRL)

Please choose the most appropriate TRL of the innovation using the dropdown list provided.

### Health category

Please choose the most appropriate health category related to your application using the dropdown list provided.

### AHSN involved in the project

Please select all that apply from the list provided.

### AHSN role

Please describe the role of AHSN in the project (*max 50 words*).

## Section 2: Host Organisation Details

Complete details relevant to your organisation. Please choose from the dropdown list where provided.

- Host organisation website
- Company registration number (for those in the UK)
- Region (where the host organisation is registered, using the dropdown list provided)
- Type of organisation
- Host organisation size
- Host organisation status
- Annual turnover (*max 10 words*)

## Section 3: Plain English Summary

A plain English summary is a clear explanation of your project. The plain English summary may be used to inform reviewers, including experts who might not have specialist knowledge of your field as well as public members/patients who might review your funding application. If your application for funding is successful, the summary may be used on the SBRI Healthcare website.

Please make sure your summary is free of technical jargon, easy to read, and provides an overview of your proposal.

It is helpful to involve patients / carers / members of the public in developing a plain English summary.

When writing your summary consider including the following information where appropriate:

1. aim(s) of the project
2. background to the project
3. design and methods used
4. patient and public involvement
5. dissemination

The plain English summary is not the same as a scientific abstract, please do not cut and paste this or other sections of your application form to create the plain English summary.

## Section 4: Project Plan

### 4.1) Description of proposed technology/device/service and expected outcomes

Please provide a narrative description for what the innovation is and how it addresses the theme AND sub-challenge selected.

The following should be provided:

- A brief description of the proposed solution
- What is the problem that the solution aims to address and how does this meet the published challenge brief?
- What is the current development state of the proposed solution?
- What are the expected outcomes of the project?
- How will the solution benefit patients, the NHS and/or Social Care sector, and contribute to a significant reduction of carbon emissions?
- Digital health interventions must consult the [NICE Digital Health Technology Framework](#) and the application should evidence plans to meet the appropriate evidence guidelines. This comprises both clinical effectiveness and economic evaluation. Please consult the NHS England guidelines for “Designing and building products and services” for the latest links to relevant standards, guidelines and consultations.
- Evidence that [NHS Digital Technology Assessment Criteria \(DTAC\)](#) has been considered if relevant.

### 4.2) Environmental impact

Please describe the environmental impact that your solution will have on the NHS:

- Describe the environmental impact that your innovation may have in the care pathway/or care delivery it is intending to operate in.
- Detail how the innovation may contribute to reducing the NHS emissions (as explained in the [Delivering a net zero NHS report](#), pages 11 and 12) and outline the quantified projected carbon savings including the methodology you used to estimate them. If you do not have any estimate, please articulate the methodology that you will adopt to quantify carbon emissions' reductions.
- At an organisation level, please provide an outline on how you intend to fulfil the NHS Sustainable Supplier Roadmap, your organisation carbon reduction targets and the timelines to fully achieve

the requirements set by the [NHS Supplier Roadmap](#).

#### 4.3) Project plan and deliverables

Please provide a detailed description of the proposed project, clearly outlining the expected exit point of the project. The applicants are expected to provide the following information:

- The proposed work packages, including PPIE, equity of access. To note, it is expected the project plan to have a strong focus on net zero.
- Detail of what will be conducted within each of the work packages, the rationale behind these work packages, key measurable deliverables, and how these will be delivered.
- Study design. This may include both quantitative and qualitative methodologies, power calculation, study cohort and implementation research plan in the context of where the innovation will be delivered, and the patient/service users affected.
- Key risks to the project and state how these will be mitigated against.
- If you are not planning to engage with patients, you **MUST** explain why.

#### 4.4) Milestones

Please list up to 7 key milestones for the project along with timings for completion. The number of milestones should be appropriate for the project, you do not need to use the maximum number.

The milestones should be comprehensive and the success criteria able to be assessed objectively (e.g. 'all tests delivered to 99% accuracy' or 'for statistical significance, 2000 samples must be processed') with an emphasis throughout on practicality as this initiative is seeking evidence that the technology is viable in the proposed setting and can be effectively deployed to and adopted by NHS trusts. Appropriate record keeping and reporting are essential, but reports are not in themselves the main goal of the project. Please indicate the roles that would contribute to the milestone under 'Resource'.

#### 4.5) Key competitors and unique selling point

Please provide details of any competitor innovations or market alternatives, which should include the following:

- The advantages of the proposed solution compared to the current standard of care.
- How is your proposed solution innovative.
- Details of any competing innovations or alternatives in the wider market (either on the market or in development) and describe the advantages and innovativeness of your proposed solution over these (i.e., what is your unique selling point).
- If there are no competing innovations, please describe how your proposed solution compares to current standard of care.
- Companies may wish to consider working with other companies to bring forward solutions that can make a real difference.

#### 4.6) Intellectual property (IP)

The definition of Intellectual Property (IP) includes patents, trademarks, designs, copyright (such as new software, checklists, scales, protocols, questionnaires, toolkits, guidelines or similar), and research tools (such as data analysis techniques, assays, cell lines, biomarkers, materials or equipment and devices).

Please provide details on the following:

- Any relevant existing background IP that will be utilised during the project and the current ownership arrangements, including patents or patent applications.
- Any IP which will be produced or improved during the project (Foreground IP) and how this IP will be captured and managed. Also provide details regarding expected ownership of foreground IP.
- Any Freedom to Operate (FTO) search that has been conducted to date. If no search has been conducted, please explain your rationale.

#### 4.7) NHS/Social Care implementation and commercialisation strategy

Please give an overview of your implementation and commercialisation strategies, including market launch and long-term adoption. Please include:

- Describe who your intended users are (for instance GPs, NHS Trusts, ICSs/ICBs, private healthcare systems, retailers, others) and the likely scalability of your product. If appropriate, define the market size you intend to serve and the expected penetration rate.
- Describe your plan and business model for local/regional/national NHS adoption, including implementation costs/implications and barriers to adoption. Consideration should be taken towards the scalability of the technology and the necessary adaptations for different service user groups.
- The health economic benefits that this product could deliver for the NHS and how you will ensure that the innovation is affordable to the NHS and wider system such as Integrated Care Systems (ICSs)
- Outline existing engagement and partnerships and the additional key stakeholders you will engage to support a sustainable spread of the innovation in care pathways (current or redesigned) and the expected timescales for local/regional/national spread
- Will additional funding be required to adopt the solution? If so, please discuss your plan for securing future funding (public and/or private)

#### 4.8) Patient and public involvement and engagement (PPIE) and equity of access

Patient and Public Involvement and Engagement (PPIE) is an accepted and recommended working practice within healthcare research ensuring that solutions are co-produced with patients, meet patient needs, and to ensure there is an acceptability among end-users. Applicants are expected to develop a thorough PPIE strategy as part of their project. Please consider including the following information in this section:

- What are your plans for PPIE? Please provide specific details such as the way you will be involving and engaging with the patients and the public, the frequency at which you will plan activities and the specific outputs.
- How will the relevant patient groups be involved in the development of innovation roll out and NHS adoption strategy?
- How will you ensure that the innovation will be acceptable to patients, their families, carers, the wider support network, and healthcare professionals?

For further information regarding PPIE, we strongly recommend applicants to refer to the [NIHR Guidance](https://www.nihr.ac.uk/documents/payment-guidance-for-members-of-the-public-considering-involvement-in-research/27372). <https://www.nihr.ac.uk/documents/payment-guidance-for-members-of-the-public-considering-involvement-in-research/27372>

The SBRI Healthcare Programme is committed to promote equality, diversity and inclusion, and reduce health inequalities through the development of technologies and solutions it is funding. Please provide the following detail in this section:

- Whether the innovation might exacerbate health inequalities, which group(s) of the public/patients might be affected and how might you minimize this.
- How the proposed innovation will ensure equity of access (e.g., underserved ethnicities, under-represented groups, economic groups, vulnerable groups, geography, digital exclusion, etc) along with the steps to understand and alleviate potential negative impacts. More information on what constitutes a health inequality can be found on The [King's Fund website](#).
- Given the rural nature of many places, an over-reliance on home and community interventions needing to be permanently online should be considered (Wi-Fi and phone signals in rural locations may be weak or unreliable).
- The cost of data use, which would negatively impact on accessibility by some low income or marginalised communities.
- Please explain your assessment of local healthcare inequalities relative to the selected theme and the challenges facing your population, including which data sources have been used for

inform this assessment and articulate the plans and objectives that are in place to deliver improvement against these challenges.

## **Section 5 – Team**

Please note that members of the project team and project partners will need to be 'invited' through the PMO RMS via email to participate as team members, after which they must confirm their participation. The same process applies with the clinical partners and sub-contractors. The application cannot be submitted without doing so.

Firstly, please ensure the team member(s), sub-contractor(s) and clinical partner(s) are registered onto the RMS portal (<https://pmo.ccgrantracker.com/>). Once their account is registered and approved, the lead applicant will be able to search and 'invite' the team member(s), sub-contractor(s) and clinical partner(s) to the application.

Please ensure that those invited to collaborate on this application confirm their involvement in good time, as the application cannot be submitted without this.

The role and time commitment of team members, advisors and sub-contractors should be included.

Please note that for applications to be considered all fields within this section must be completed fully and to a satisfactory level. This includes complete descriptions of team members, sub-contractors, advisors, clinical/HCP partners, their experience, their roles in the project, FTE commitments (if applicable) and costs.

### **5.1) Team member roles and % FTE commitment**

Please add details of all team members and their role in the project. A maximum of 10 team members can be added. Do not include sub-contractors in this section.

Team members are those that belong to the host organisation and individuals with responsibility for the day-to-day management and delivery of the project. Team members are considered part of the project team and are expected to share responsibility for its successful delivery. Those outside of the host organisation should be listed as subcontractors or advisors.

Members of the project team will need to be registered and approved on the RMS before they can be added to an application. After being added to the application, they will first be 'invited' by the RMS to participate as a team member; if they accept, they will receive a further email to confirm their participation. The same process applies with the clinical partners and sub-contractor.

Please note that the application will not submit unless all team members added have confirmed their participation.

Please provide a job title, detailed description of the role performed in the project, time allocated to the project and relevant experience and skills. Time allocated to the project should ideally be expressed as an FTE percentage (the time allocated during the period of the project indicated as a proportion of the working hours for a Full Time Equivalent position).

Relevant commercial and management expertise of team members should be included.

### **5.2) Sub-contractor and advisor roles and % FTE commitment**

Subcontractors and advisors are individuals that do not belong to the lead organisation and will provide a fee for service (or in-kind contribution); clinical partners should be listed in clinical/HCP partners section.

Please provide the details of any sub-contractors or advisors involved in your application. A maximum of 10 sub-contractors/advisors can be added. Please provide a job title, detailed description of the role performed in the project, time allocated to the project and relevant experience and skills of the sub-contractor(s) or advisor(s).



The use of sub-contractors is optional; however, where your proposal involves sub-contracted individuals or companies, or benefits from the input of named expert advisors, details should be provided.

While quotes for activities can be in the form of forecasts in this application, you will be asked to provide formal quotes as part of the due diligence process if you are successful. If an advisor provides services at no cost or at a level of expenses incurred only, this detail should be indicated.

### 5.3) Clinical/healthcare professional (HCP) partner roles and % FTE commitment

Clinical/HCP partners are individuals that do not belong to the host organisation and will provide a fee for service (or in kind contribution) in relation to the clinical elements of the project.

Please provide the organisation name, clinician/HCP's job title, a detailed description of the role performed in the project, time allocated to the project and relevant experience and skills of the clinical/HCP partner(s).

The use of a clinical/HCP partner is not mandatory, but it is strongly recommended. A maximum of 10 clinical/HCP partners can be added.

### 5.4) Other Posts (*max 300 words*)

Please provide a detailed description of any other posts that are yet to be confirmed or appointed for the project. Please also provide the job title, a detailed description of the role performed in the project, time allocated to the project and relevant experience and skills that are required for the role. Those named in "Other Posts" will not be able to join the Interview Panel.

## Section 6 – Budget

### 6.1) Application Finances

Please note that SBRI Healthcare is not a grant and not VAT exempt. If you are successful, you will be awarded a Development Contract which is subject to VAT. All project costs should be indicated as NET cost incurred and a VAT charge at 20% may be applied. Please note the maximum cost a proposed projects can request is detailed in the Competition Brief and the associated Invitation to Tender.

Please provide a line-by-line summary of costs of the project in the table supplemented. The costs quoted must reflect actual costs at a "fair market value" and profit should not be included.

Please note, costs to support basic research, development of research hypotheses, and experimental designs that have no practical commercial application are not eligible.

Please note that when indicating costs, the NET costs should be provided in the respective rows of the table supplemented. Please see some general guidance [here](#).

- Labour costs (for all those contributing to the project)
- Material costs (including consumables specific to the project)
- Capital equipment costs
- Sub-contract costs
- Travel and subsistence costs
- Indirect costs • Other costs
- Total NET costs (auto populated)
- Please confirm if you will be claiming VAT at 20% (please tick yes if you will apply VAT to the total costs)

\*Please note VAT is the responsibility of the invoicing organisation.

### 6.2) Justification (*max 500 words*)

Please provide a justification of the costs, or staff involved and quotes from sub-contractors where applicable. If there is significant use of sub-contractors, please explain how these will be used and the costs of each. Please note the Assessors are required to judge the application finances in terms of value for money, evaluating whether the proposed cost for effort and deliverables in a proposal reflect a fair



market price. Applicants are strongly encouraged to consider the guidance provided in the Cost breakdown section below and summarise the elements in the application justification section.

Itemisation of costs and methods of calculation may be requested at a later date to support the application.

## **Cost breakdown**

Please download, complete and finally attach the Finance spreadsheet with the details of all your costs following the different costs categories:

- START – AWARD DETAILS
- Labour costs
- Material costs
- Capital equipment costs
- Sub-contract costs
- Travel and subsistence costs
- Indirect costs
- Other costs

Please use the following guidance and consider the following when completing the spreadsheet. Please note that for the application to be considered, a complete breakdown of requested budget using the template provided is required. Budget provided in other formats will not be accepted. The funding requested in the spreadsheet must be aligned with the application form.

### Labour costs

- In the Labour costs section, please provide details of posts and salaries of team members. This includes: name, role, grade (put N/A if not relevant), annual salary and on-costs (cost incurred by the organisation to employ someone), %FTE dedicated to the project and the total number of months on the project (1-12). Use only Year 1. Please also include details about staff that are to be recruited and justify staff positions in the 'Justification of Costs' section at the bottom of the sheet and ensure the posts/figures entered are in line with those entered in the application form.
- Full economic cost (FEC) calculations are not relevant in this context. SBRI is a competitive procurement mechanism and tenders are submitted by a variety of organisations. Whatever calculations are used to arrive at the tender price, each application is assessed against bids from other organisations. Applicants should bear this in mind when calculating their tender price. Costs should reflect fair market value.
- Please note that a SBRI Healthcare award is not a grant but is considered as a development contract responding to a tender, as such, Full Economic Costing (FEC) is not covered. If the Lead Organisation is a university, please refer to your finance/contract office for guidance on tender applications.
- Review salary costs and challenge salaries that seem too high in comparison to what is "market fair rate".
- Excessive time commitment for specific salaried staff.
- High number of salaried staff for size of project.
- Too few staff contracted for size of project or no salaried staff at host organisation.

### Materials

- Please provide details of the consumables required for the project and justify the costs wherever possible, particularly for larger consumables items.
- Please ensure that granularity is provided on material and consumables.
- If a license for an app/service is listed, it is expected that it is at costs and no profit is charged.

### Capital equipment

- Capital expenditure should be clearly justified in relation to the project and the cost should take into account the duration of the project.
- Leasing equipment from a provider or borrowing from existing facilities is an option to consider.
- Any equipment over the value of £250 should be itemised. Anything under can be grouped.

- All equipment should be clearly justified at the bottom of the spreadsheet.

#### Sub-contract

- Outline the hourly/daily rate for each provider including consultancy, sub-contractors, IP and legal.
- Please ensure costs for PPIE (such as travel fees, accommodation and subsistence where applicable, support costs if required and training) are included.
- If successful, quotes from individual subcontractors will be requested prior to contracting.

#### Travel and subsistence

- Please include project-related travel costs using the most economic means possible. Please note that meals & accommodation are acceptable.
- Please add details to justify the costs (number of visits, travel required, subsistence associated to a specific meeting, etc.) and provide details of conferences and the number of people attending (if applicable).

#### Indirect costs

- Indirect costs may include estate costs (e.g., building and premises costs), services/utilities, rent or lease, insurance, other departmental costs (for example Finance & HR).
- Overhead costs should be charged in proportion to the amount of effort deployed on the project and should be calculated using own cost rates. Costs that are considered unreasonable could be rejected.

#### Other costs

- This may include all other cost items which do not fit elsewhere, such as any dissemination costs related to publication or dissemination of findings. Please note that services outside England are acceptable but should be clearly justified in the justification section.

### **Section 7 – Supporting Information**

Please submit the following supporting documents with your application form.

- 3 minutes video pitch in MP4 format at a maximum file size of 40MB to support your application: Please upload the video to a file sharing platform that does not have link expiration. Please do not upload your video to a streaming service or to your Institutional SharePoint (mandatory)
- Finance spreadsheet (mandatory)
- Gantt chart (1 single side A4, mandatory)
- Additional supporting documents (2 single sides A4, optional)

Additional support documents may include a flow diagram illustrating the study design and the flow of participants, diagrams, pictures etc. If submitting a flow diagram, applicants should also describe complex interventions and controls as accurately and fully as possible within their diagram.

NOTE: Uploads MUST be provided as a Word or PDF document or you may not be able to submit your application or it may be difficult for the Panel to view the required information in order to assess your application.

*Excessive attachments may lead to your application being excluded from the assessment process.*

### **Section 8 – Administrative Contact Details**

Please provide the details of an administrative lead as a secondary point of contact for any queries relating to this application.

### **Section 9 – Validation Summary**

Please follow the steps on the screen in order to validate and submit your application.

All mandatory fields should be completed, and team members invited must validate and approve their participation.

Once submitted, the completed application can be viewed or downloaded from the PMO RMS Portal. However, you will no longer have the ability to edit the application.

Please visit the [SBRI Healthcare competition pages](#) for details on the application deadlines. Only those applications received before the competition deadline will be accepted. **PLEASE DO NOT SEND COMPLETED APPLICATIONS BY POST OR BY ANY OTHER MEANS OTHER THAN THROUGH THE PORTAL.**

For more information please see [www.sbrihealthcare.co.uk](http://www.sbrihealthcare.co.uk). Questions on the challenges and scope of this **SBRI Healthcare competition** should be addressed to the Programme Management Office via email to [sbri@lgcgroup.com](mailto:sbri@lgcgroup.com).

## Assessment criteria

- How well does the application address the challenge brief and does the proposed solution benefit patients, the NHS and/or Social Care Sector and support the NHS to reach its net-zero ambition by contributing to a significant reduction of carbon emissions? **30%**
- Are the project plan, deliverables and risk mitigation strategy appropriate? **15%**
- Is the product innovative, will it have a competitive advantage over existing and alternative solutions and are the arrangements surrounding the use and development of Intellectual Property appropriate? **10%**
- Does the proposed project have appropriate implementation plans and a credible model for potential regional and national scale up? **15%**
- Does the proposed innovation have potential to enhance equity of access and does the project include consideration towards patient and public involvement? **10%**
- Do the host organisation and project team appear to have the right skills and experience to deliver the project? **15%**
- Are the costs justified and appropriate? **5%**

Bids will be concurrently reviewed by the Greener NHS Team to assess whether proposals fully align with the Greener priorities as set in the [Delivering a 'Net Zero' National Health Service report](#).

## Further guidance on using the Research Management System (RMS)

Applications must be made through the RMS [online application portal](#). A template application form may be downloaded from the SBRI Healthcare website. However, please note that this is for demonstration purposes only and may not be used to submit an application.

**Register as a new user**



Consent Please indicate whether you consent to the following:


Communication Preferences  
 The Programme Management Office would like to communicate with you regarding networking events, funding or collaboration opportunities which we believe you may find useful. If you consent, we will let you know about these opportunities via email. You can unsubscribe or change your preferences at any time via the RMS system or by contacting us at [pmo@ccgrantracker.com](mailto:pmo@ccgrantracker.com)

Do you consent to this?

5. Select the “Terms and Conditions” and, once read, tick the confirmation box.

**Terms and Conditions**

Before you can submit your registration, please read and accept our terms and conditions below.

 [Terms and Conditions](#)  I accept

To complete the registration process, please click the submit button below. By doing so you agree to be bound by the terms and conditions detailed in the above link.

6. Click “Submit”

7. An email containing a link to create your password to subsequently gain access to the system will be sent to the previously entered email address once your registration details have been approved by a grant administrator. Please allow two working days for the registration to be completed.

8. Please add <mailto:pmo@ccgrantracker.com> to your trusted senders as these emails are prone to Spam or Junk folders.

In order to register successfully, please comply with the following:


- We insist on institutional emails if available – This is a double check that the contact is who they say they are and represent the organisation registered with (anyone can create a Gmail/Hotmail account and claim to be someone).
- We do not accept generic / group emails – The RMS is used for conflict checks and will flag these. If numerous people are using one email conflicts aren’t picked up and we will not know who is using the system.
- We do not accept multiple accounts – Again to ensure conflict checking is effective.
- Registered Organisations – The UK associated organisation must be registered / available on Companies house, Charity Commissions, UK Register of Learning Providers or Organisations Data Service. Funding will only be given to organisations which are suitably credit checked using these.
- Sole Traders – The PMO does not fund sole traders as they will not pass financial checks.

## Access the RMS


### Existing Users

Please log in to access your account.

Email

 Please enter your email.

Password

 Please enter your password.

[Forgot Password?](#)

1. Enter your email address and password and click “log in”. If you are accessing the system for the first time, the Basic Information page will display. Once the relevant fields have been completed, press Save button
2. The account home page will now display indicating access to the system.

## Forgotten password

Email

❗ Please enter your email.

Password

❗ Please enter your password.

[Forgot Password?](#)

1. From the PMO home page click the “Forgotten Password?” hyperlink.
2. Enter the email address with which you registered and click submit
3. An email containing instructions for resetting your password will be sent to the registered email address.

Please note, persistent use (>3 attempts) of an incorrect password will lock your account; this is to protect you from attempts to access your data by a third party. If this happens, you can request a new password via the forgotten password function.

## The RMS Home Page

Home	Feedback
<a href="#">My Applications</a>	Kindly take a moment to anonymously share your thoughts on your user experience through the <a href="#">System Feedback Form</a> .
<a href="#">My Co-applications</a>	
<a href="#">My Grants</a>	Please enter details of your CV
<a href="#">My Research Outputs</a>	Please ensure that your details including your CV, are up-to-date as these are required for the submission of an application. You will not be able to edit this information directly from an application form. To edit your details go to <a href="#">My Details</a> and complete the basic information and update your CV.
<a href="#">My Review Responses</a>	
<a href="#">My Reviews</a>	
<a href="#">My Tasks</a>	<a href="#">New Grant Application</a>
<a href="#">Manage My Details</a>	To apply for funding from one of our grant streams click <a href="#">here</a> .
<a href="#">Contact Us</a>	
<a href="#">Logout</a>	You have...
<a href="#">System Help</a>	15 unsubmitted grant applications <a href="#">Click here</a>

## Managing my details

Select “Manage My Details” from the left-hand menu

### Manage My Details

This section allows you to maintain your personal information.

In [Basic Information](#) you can update personal details such as your name, institution, address and telephone number.

In [Update CV](#) you can edit your CV (last updated ) any changes you make will be shown in your applications.

In [Change Email](#) you can change the email address that we use to contact you (this will also change the address that you use to login).

In [Change Password](#) you can change the password that you use to login.

Lead applicants and project partners (team members, clinical partners or subcontractors) can manage their basic contact information and curriculum vitae (CV) through the 'Manage my Details' link on their application portal home page. Lead applicant and project partners' contact information is integrated by the application portal into the relevant fields during the application process.


### Creating and completing an online application

The lead applicant must initially create the new application.



1. Select "My Applications" from the left-hand menu and click the "New Application" button

[New Grant Application](#)

To apply for funding from one of our grant streams click [here](#).

2. A list of open funding rounds will display along with further information about the competition.
3. Selecting "Apply" will open an application form for completion  Denotes a mandatory field

From the application summary page, the application can be edited by clicking on the 'Edit' button. The different sections of the application form can then be accessed via the list of hyperlinked buttons on the left-hand side of the application portal webpage. You can move from page to page either by using the 'Previous' and 'Next' buttons, or using the list on the left-hand side of the web page.

Most questions are associated with contextual help  buttons and clicking on them will open up pop-up windows containing brief guidance notes that supplement the published guidance for applicants. It is strongly advised that applicants refer to the published guidance first and then use contextual help  as they complete and review each question, as contextual help is not designed to replace it. Mandatory questions are flagged with a red dot.

The research team can collaborate with the lead applicant to edit the content in the application by being invited to be a team member or a clinical partner through the Team section (section 5) of the application form.

The lead applicant can use the search tool to find project partners and then to invite them to join the application. The application portal will automatically dispatch an email inviting the project partners to confirm their participation in the application. The invited project partners can then decide whether to accept the invitation and consent to the application being submitted jointly in their name. They will need to log into the application portal and follow the links to 'Confirm' their involvement on the co-application summary page. Once confirmed, the project partner will be granted access to edit the online application form.

All project partners must not only 'Confirm' but also 'Approve' their invitation to participate in the application electronically on the co-application summary page in advance of the submission deadline.

The system will prevent your project partners accessing your application at the same time as you. This stops applicants and co-applicants inadvertently making changes to the same part of the application at the same time and overwriting each other's work.

### Remember to save your work

You will be prompted to save your work if you leave the browser in application editing mode. We recommend you save your work regularly to minimise the risk posed by any local computer or internet problems. You can save and return to the application form as often as you like prior to submission.

### Exiting and returning to work on your form

Should you wish to exit your form, you can return at any time; simply log in using your username and password and select 'My Applications' from the menu. You will then be presented with a list of all the



applications you are currently involved with as well as providing details as to their stage in the submission process.

### **Validation and submission of the form**

The lead applicant can review the progress of their application at any time by selecting the 'View/Print' option on the application summary page to generate the application as a PDF File.

When the application form is complete, it must be validated prior to submission. The validation step is a check run by the application portal to assess whether all the mandatory questions contain information. It will provide a list of links to any parts of the form where corrections or additional content are needed.

Once the application has been validated successfully and no further corrections are needed, the lead applicant can submit the application by clicking on the 'Submit' button on the lower right-hand side of the application summary page.

### **Following submission**

A programme specific reference number will be assigned to the application once it has been submitted. After the relevant competition round closes, the application will automatically enter the process of being considered for funding.

If you have any questions regarding your application, please email [sbri@lgcgroup.com](mailto:sbri@lgcgroup.com)