SBRI Healthcare: NHS England and NHS Improvement competition for Phase 2 development contracts

APPLICANT AND PORTAL GUIDANCE

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

The Invitation to Tender and Challenge Brief can be found on the SBRI Healthcare Website under Open Competitions.

Funding prerequisites

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

1. A commitment to involving members of the public and patients in the design and management of the research, evaluation or study.

2. 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.

3. Steps towards contributing to the overall carbon neutral strategy for the NHS.

Phase 2 is intended to expand on the technical feasibility testing of Phase 1, funding a further 12 months of development work to substantially progress projects towards commercialisation.

A total contract amount of up to £800k (NET costs, excl. VAT) is available to cover costs associated with product development, market research, user testing, workshops and clinical validation, although as each project is individual there are no absolute requirements for the types of activities that we expect a Phase 2 application to include. However, it is important to keep in mind the timelines, especially for pieces of work involving clinical testing and validation, and be certain to make sure each work package has appropriate milestones/end points for the end of Phase 2 to demonstrate the project's progress.

Please note that only one Phase 2 application can be submitted to apply for further support for an

awarded Phase 1 project. Phase 2 applications need to continue to meet the same needs as described in the competition brief under which your project was awarded a Phase 1 contract. Please also note that incomplete applications will not be considered for review. As such, please ensure that all fields are completed fully and to a satisfactory level.

For applications to be considered, the following conditions must be met:

•   Completion of all mandatory fields in the application form.

•   A complete breakdown of requested budget using the template spreadsheet provided. Budget provided in other formats will not be accepted.

•   The funding requested in the spreadsheet must be aligned with the application form.

•   Descriptions of any listed team members, clinical partners, and/or subcontractors, including descriptions of their experience, their roles in the project, and costs should be provided.

Guidance for completing your Phase 2 application on the PMO 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 do 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.

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.

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

Section 1: Application Summary

Application title
Please provide a title for the project that would be suitable for publication. This should be descriptive, concise and contain keywords relevant to the project.

Sub-challenge selection
Please ensure that the correct sub-challenge and associated sub-category of the competition has been entered from the drop-down list.

Host organisation

Please give details of the organisation who will be responsible if the project is funded.

Contract start date
Please enter the earliest start date for your Phase 2 project. Projects are expected to start approximately six weeks after the SBRI Healthcare Selection Panels. The start date is provisional and will be confirmed by the PMO.

Contract duration
Phase 2 projects are a maximum of 12 months duration.

Total contract costs
This field will automatically be populated to show the total NET cost provided in section 6.

Health category
Please choose from the drop-down list provided.

Type of innovation
Please choose from the drop-down list provided.

Technology readiness level (TRL)
Please choose from the drop-down list provided.

Market segment
Please choose from the drop-down list provided.

Market size (max word limit: 50)
Please provide the expected market size for your proposed technology/solution.

AHSN involved in the project
Please choose from the drop-down list provided.

AHSN role (max word limit: 100)
Please provide a brief description of the role of the AHSN in the project.

Section 2: Company Details

Complete details relevant to your organization: company website, company registration number (for those in the UK), VAT registration number, region, company size, company status, type of organisation, main business activity and annual turnover.

Section 3: Plain English Summary

A plain English summary (max word limit: 500) 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 members of the public of 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 jargon and 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:

- aim(s) of the project
- background to the project
- design and methods used
- patient and public involvement
- 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. Outcomes from your SBRI Healthcare Phase 1 project and evidence to date (max word limit: 800)

Please provide a summary of the outcomes from your Phase 1 project, and how they support and manage any risk relating to the development work for Phase 2. Please include details of steps you have taken to verify the demand and need for your solution with clinicians, potential end-users and commissioners (as appropriate).

Please also ensure to provide clear information regarding the current state of development of your technology/solution and its level of readiness. Please also provide details about the evidence generated to date.

While assessors will have the project's Phase 1 final report available to them, it is advised that applicants should include in this section an explanation in layman's terms the key factors of the project, what was accomplished in Phase 1, how this was achieved, how you have engaged clinical and end-user partners, and why Phase 2 is now relevant.

4.2. Phase 2 summary and expected outcomes (max word limit: 700)

Please clearly describe the specific problem that the technology/solution aims to address, the patient cohort/population that you are targeting with the proposed solution, the benefit it will bring to patients and your particular patient cohort, and finally please provide the specific expected outcomes and clearly describe the exit point for your proposed Phase 2 project, including the new product, solution or service that would be available at the end of Phase 2.

Please also specify the milestone or outcome that would mark the end of Phase 2.

Please ensure that you also include an explanation of how your technology/solution fits within the care pathway and, if relevant, the implications and impact that the implementation of your technology/solution will have on current care pathways, considering how the healthcare system may need to adapt or if potentially there is a need to redesign the care pathway. Please provide details of potential impact on processes, people, culture and policies that will need to be taken into account.

4.3. Project plan and deliverables (max word limit: 2000)

Please provide a detailed description of the proposed Phase 2 project. This section should identify milestones and timings. Applicants should add a separate file for the Gantt chart using the attachment link within this section.

Please highlight any expected changes for Phase 2 from the project team that delivered Phase 1, also identify the project manager, if different from the lead applicant. Please provide details of planned subcontracting agreements, and confirm if those agreements are already in place.

Detail is important here. Explain with precision what it is that will be done in Phase 2, by whom and by when. Concise definitions of success for each milestone are also essential and these should be tangible deliverables. The whole plan should allow reviewers to easily understand what will be achieved and how you will know it has been successful.

The project plan should include the following:

- Each individual work packages within your project, including well-defined milestones and key measurable deliverables.
- Key risks associated with the project alongside mitigation plans. Ensure that these risks are considered when defining the milestones.

4.4. Milestones

Please list up to 10 key milestones for the project, along with timings for completion, and details of the person/organisation responsible for delivering the milestone (under 'resource') in the table supplemented.

The milestones should be comprehensive and have objective success criteria (e.g. 'all tests delivered to 99% accuracy' or 'for statistical significance 2000 samples must be processed') with an emphasis throughout on practicality – we are seeking evidence that the technology works against specific claims, can be made into a viable product and can achieve the proposed benefits.

Please note that the milestones stated may be used as part of the contract if your application is successful. It is advised that milestone dates be aligned with the programme's quarterly interim reporting requirements, to assist in the description of the project's progress.

4.5. Patient and Public Involvement (PPI) (max word limit: 600)

We anticipate all project proposals to have a significant PPI component integrated into the project plan. 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 have developed a thorough PPIE strategy towards their Phase 2 projects.

Please describe how patients and service users have been involved in the design and development of your solution to date, and your plans for involving patients and the public in your Phase 2 project.

Please include how will you ensure that the innovation will be acceptable to patients and to the wider health care community (their families, carers and wider support network).

For further information regarding PPIE, we strongly recommend applicants to refer to [Involve guidance](#).

4.6. Equality, Diversity and Inclusion and Net Zero Policy (max word limit: 400)

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.

Applicants are expected to analyse the impact of their technologies on the wider population and people with protected characteristics, underserved and underrepresented population and to consider geographical reach.

More information on what constitutes a health inequality can be found on The King's Fund website.

The programme is also committed to ensure that proposed technologies/solutions are considering steps towards the carbon neutral strategy and objectives for the NHS as identified in the Delivering a Net Zero NHS report. Particularly, we expect applicants to consider the impact of their technologies on the carbon emissions throughout the lifecycle of their products, and how it will contribute to net-zero emission by 2040.

4.7. Key competitors and unique selling points (max word limit: 300)

Please describe the market you plan to address, ensuring to address the following:

- Barriers to entry
- Cost of the problem

Please also provide details of competing technologies or alternatives, either on the market or in development, and describe the advantages and innovativeness of your proposed solutions over these (i.e. what is your unique selling point?). If there are no comparable products, please explain the advantage of your technology over the current standard of clinical care.

4.8. Intellectual Property (max word limit: 300)

The definition of Intellectual Property (IP) includes patents, trademarks, designs, copyright (such as new software, checklists, scales, protocols, questionnaires, toolkits, guidelines or

similar), research tools (such as data analysis techniques, assays, cell lines, biomarkers, materials or equipment and devices) and (clinical) data.

Please provide details of any relevant existing background IP that will be utilised during the project and the current ownership arrangements, including patents or patent applications.

Clearly detail the ownership of background IP and any relationships that must be upheld for both the completion of the project and its commercial use in the UK (secured future access).

Please describe/explain:

- Any other existing third party Intellectual Property (IP) not owned exclusively by the applicant, and its significance to your freedom-to-operate.
- Any IP which will be produced and/or improved during the project (foreground IP) and how this will be managed and captured. Also provide details regarding expected ownership of foreground IP.
- Details of any freedom-to-operate searches that have been conducted to date.

Please describe here all relevant competing IP, and related products, that may influence the success of your project.

4.9. Commercialisation and NHS/Social care implementation strategy (max word limit: 1400)

Please describe how the product will be commercialised and the planned route to market (distribution, sales, etc.). Please include:

- A prediction of the target pricing and margins anticipated for this product.
- A discussion of the health economic benefits that this product could deliver for the NHS and/or Social Care sector.
- A brief review of the market size for this product in the NHS and beyond (EU, US, etc.), including growth rate of the market, main competitors and potential adoption issues.
- A description of your plans for full commercial implementation including plans for internationalisation. Please also indicate how the product is likely to be used, who the customer is, and evidence of users' willingness to buy.
- An indication of whether additional funding will be required to commercialise the product. If so, describe the expected capital investment and the plans to raise this.

Please ensure that any regulatory hurdles arising are clearly indicated and taken into account.

Information gained from Phase 1 NICE META Tool will be beneficial in this section. Please show evidence of your understanding of the current market, entry points, and how you will position yourself within it to have widespread adoption (UK and otherwise).

4.10. Plans for manufacturing (if applicable) (max word limit: 900)

Please outline the plan for manufacturing the product. If applicable, describe the current scale of manufacture and how easy it is to scale up the manufacturing process. Please describe:

- Any issues that need to be resolved in order to have a reliable manufacturing process.
- Whether the product will be manufactured in-house or will involve third party manufacturing.
- The quality systems and regulatory requirements which apply to the manufacture of the product.
- The anticipated cost of the final product.

Enter "N/A" in this field if such information is not applicable to the project, however we expect that most projects funded will need to answer at least some of the aspects listed above.

SBRI Healthcare accepts that third parties may be involved in manufacture, however please include details on why an organisation was chosen and the agreements in place to secure their collaboration. Information on how teams will be able to work to scale and meet regulatory requirements is also important to include.

Section 5: Team and Sub-contractors

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.ccgranttracker.com/). Once their account is registered and approved, the lead applicant will be able to '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 subcontractors 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, subcontractors, advisors, clinical/HCP partners, their experience, their roles in the project, FTE commitments (if applicable) and costs.

5.1. Project team members

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 individuals with responsibility for the day to day management and delivery of the project. Team members are considered employees of the Lead Organisation and are expected to share responsibility for its successful delivery. All other members outside of the Lead Organisation should be added under sub-contractor, advisor, clinical partners or other posts as appropriate.

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(s) and advisor(s)

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 subcontractors 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(s)

Please provide the organisation name, clinician'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 partners can be added.

5.4. Other posts

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.

Section 6: Budget

6.1. Application finances

Please note that SBRI Healthcare is a pre-commercial procurement programme and as such it 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 that proposed projects can request a maximum total of £800,000 NET costs and requests for funding above this will be rejected.

Please provide a line-by-line summary of costs for Phase 2 in the table supplemented. The costs quoted must reflect actual costs at a "fair market value" and profit should not be included. Please note that when indicating costs, please indicate the NET costs in the respective rows of the table supplemented.

- 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 (autopopulated)
- 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.

6.4. Finances justification (max word limit: 500)

Please provide a justification of the costs, or staff involved and quotes from sub-contractors where applicable. (max word limit: 500)

If there is significant use of subcontractors, 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.

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

Please download, complete and finally attach the SBRI 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

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 use Year1 for your Phase 2 project. 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.

In the Material costs section, please provide details of the consumables required for the project and justify the costs wherever possible, particularly for larger consumables items.

In the Capital equipment section, 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 should be itemised over the value of £250. Anything under can be grouped. All equipment should be clearly justified at the bottom of the spreadsheet.

In the Subcontractor costs section, please outline the hourly/daily rate for each provider including consultancy, sub-contractors, IP and legal. Here we also expect to see payment for PPIE time (rates should be provided to justify the costs), PPIE travel fees, accommodation and subsistence where applicable, support costs if required and training.

In the Travel and subsistence costs section, please include project-related travel costs using the most economic means possible. Please note that meals & accommodation are acceptable. Remember to 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).

In the Indirect costs section, you may include:

- Estate costs: for example, building and premises costs, services/utilities, rent or lease, insurance, etc.

- Other indirect costs may include other departmental costs (for example Finance & HR).

Finally, in the Other costs section you should 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.

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/contracts office for guidance on tender applications.

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 should also be aligned with the application form.

Section 7: Supporting Information

If required, two additional supporting documents can be submitted with your application form (2 A4 pages, e.g. 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.

Please note that uploads must be provided as a Word or PDF document.

Please note that 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 project partners invited should have validated 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 refer to your invitation letter and 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 THAN THROUGH THE PORTAL.

For more information please see www.sbrihealthcare.co.uk.

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 website, however, please note that this is for demonstration purposes only and may not be used to submit an application.

Register a new user

Only registered users and project partners of the RMS application portal can apply and support an application. Applicants/project partners new to using the application portal should register as a new user. Once logged into your account the application portal home page is the starting point to create applications, access co-applications and to update contact information and professional details.

1. As a new user, on the right-hand side of the homepage, select 'Register'.
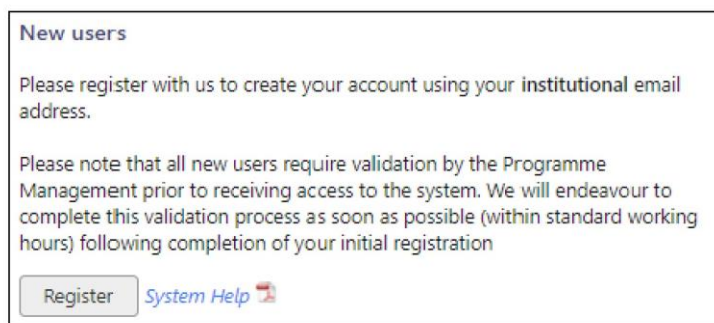
2. Enter your organisation email address and confirm. Your email address will become your sign-in username. Please use your organisational (NOT personal) email address for this. Select 'Next'.

3. Enter your details in all fields and select 'Next'. Note: denotes a mandatory field which must be completed.

Register

Thank you. Please complete the remainder of this short registration form.
(* denotes a mandatory field for registration)

To register for access to the Programme Management Offices Research Management System please enter your personal details in the form below. Upon successful registration, a confirmation of your login and password will be sent to the email address supplied. Registered users should only have a single account, so if you already have an account in the system please return to the login screen.

Our purpose for collecting this data is to register you in the system and to have the necessary information to communicate with you about grant management activities. The data we collect here is collected in the public interest. Information provided here may be subject to Freedom of Information requests. These notices are under constant review and will be updated and/or revised based on that review as appropriate.

If you have any other queries about registration or an existing account then please contact us.

Email	
Title	(select) ▼ *
First Name	*
Last Name	*
Nationality	(select) ▼ ❓
Expertise	
	25 word max (25 words left) *
Specialty	(Select) ▼ ❓
Position	* ❓
Department	❓
Organisation	*
	To select your organisation, begin typing its name and select from the list.
Address	
City	
County	
Postcode	
Country	
	to select the country, enter a minimum 3 characters and select from the list
International Dialing Code	e.g. +44
Telephone	

4. Ensure the Consent question entitled 'Communication Preferences' at the bottom of the page is answered.

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@ccgranttracker.com

Do you consent to this?   Yes   No

Next   Cancel

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.
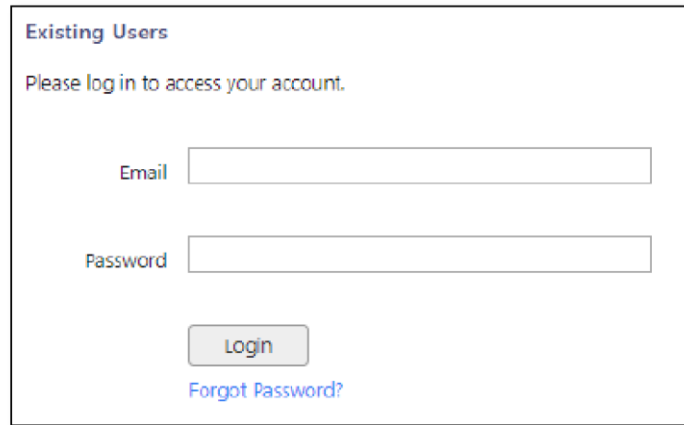
next

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@ccggranttracker.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.*
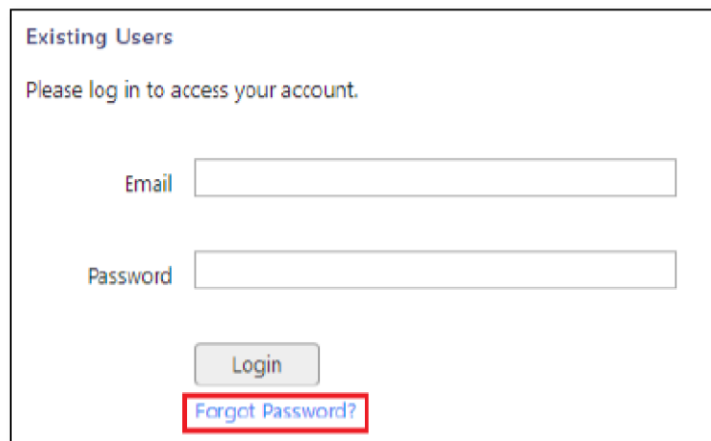- *Sole Traders – The PMO does not fund sole traders as they will not pass financial checks.*

Access the RMS

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 the 'Save' button.

2. The account home page will now display indicating access to the system.

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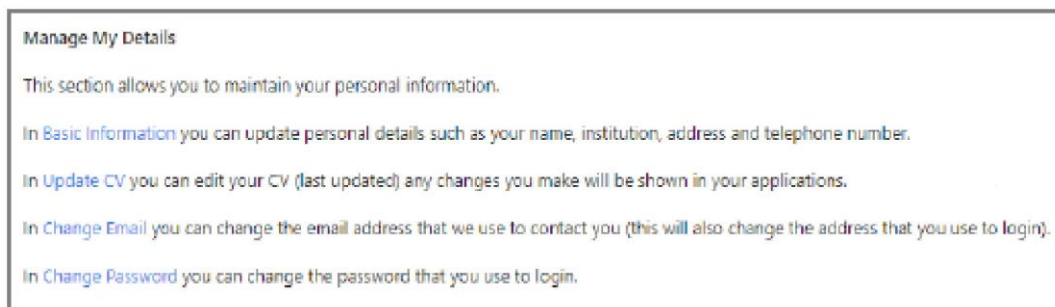
Please note, persistent use (>3 attempts) of an incorrect password will lock your account; this is protect you from attempts to access your data by a third party. If this happens you can request a new password via the forgotten password function.

The RMS Home Page
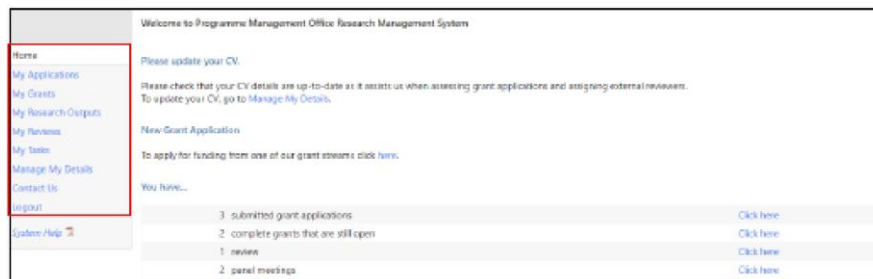
Managing my details

Select 'Manage My Details' from the left-hand menu

Lead applicants and project partners (team members, clinical partners or sub-contractors) 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.
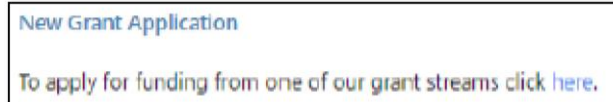
2. A list of open funding rounds will display along with further information about the competition.

    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. <u>Mandatory questions are flagged with a red dot.</u>

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.

The lead applicant will be informed of the outcome at each stage of the process. If shortlisted for the panel meeting, a short video will be requested instead of an interview.

If you have any questions regarding your application, please email sbri@lgcgroup.com