SUPPORTING INFORMATION FOR APPLICANTS SUBMITTING STAGE 1 & 2 APPLICATIONS

(On-line NIHR Stage 1 & 2 Standard Application Form (SAF))

Version: 1.6 April 2019
## Content

<table>
<thead>
<tr>
<th>Title</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. About this supporting information</td>
<td>3</td>
</tr>
<tr>
<td>2. NETSCC proposal resubmission policy</td>
<td>3</td>
</tr>
<tr>
<td>3. Eligibility</td>
<td>3</td>
</tr>
<tr>
<td>4. Joint Funding</td>
<td>4</td>
</tr>
<tr>
<td>5. Data Protection</td>
<td>4</td>
</tr>
<tr>
<td>6. Data Security</td>
<td>5</td>
</tr>
<tr>
<td>7. Research Design Service</td>
<td>5</td>
</tr>
<tr>
<td>8. Clinical Trials Unit Support</td>
<td>5</td>
</tr>
<tr>
<td>9. Clinical Research Network support</td>
<td>6</td>
</tr>
<tr>
<td>10. INVOLVE/ Public Involvement</td>
<td>6</td>
</tr>
<tr>
<td>11. PROSPERO registration</td>
<td>6</td>
</tr>
<tr>
<td>12. UK Biobank</td>
<td>7</td>
</tr>
<tr>
<td>13. NIHR Carbon Reduction Guidelines</td>
<td>7</td>
</tr>
<tr>
<td>14. Transparency agenda</td>
<td>7</td>
</tr>
<tr>
<td>15. Governance and Regulation</td>
<td>7</td>
</tr>
<tr>
<td>16. Reasonable costs and value for money</td>
<td>8</td>
</tr>
<tr>
<td>17. Guidance on costing for different types of organisations</td>
<td>8</td>
</tr>
<tr>
<td>18. Guidance for using the electronic stage 1 application form</td>
<td>9</td>
</tr>
<tr>
<td>19. Guidance for using the electronic stage 2 application form</td>
<td>12</td>
</tr>
<tr>
<td>20. Assistance</td>
<td>18</td>
</tr>
</tbody>
</table>
1. About this supporting information

This document contains information to assist applicants submitting a Stage 1 & 2 application form. Applications for funding are made online through the NETSCC Management Information System (NETSCC MIS). You must register or log-in to the NETSCC MIS to complete and submit your application.

Please also ensure that you have read the Stage 1 or 2 application form guidance notes fully and referred to the PHR programme website. We have endeavoured to cover all necessary information relating to the application form through these resources. Incorrectly completed applications may be rejected.

The following additional supporting information is available on the individual PHR funding opportunities web pages:

- PHR Programme page / aims and scope
- PHR application process
- Tips for success in applying
- Webinar – Tips for success
- Word version of the Stage 1 application form
- PHR Stage 1 application form guidance notes
- Word version of the Stage 2 application form
- PHR Stage 2 application form guidance notes

Other information / links:

- ‘Engaging and responding to the public health community’ (from the Prioritisation Committee) - https://www.youtube.com/watch?v=pUVuDft0mal
- ‘Advice on applying for funding’ (from the Funding Committee) - https://www.youtube.com/watch?v=-mFJ3nO8oxc
- MRC complex intervention guidance
- MRC natural experiments guidance
- ISRCTN registry

2. NETSCC proposal resubmission policy

Please note that an unsuccessful proposal cannot normally be resubmitted to this or any other NETS programme within one year of the original decision letter, unless applicants can demonstrate that it has changed significantly and is essentially a new proposal.

3. Eligibility
Anyone who considers that they can carry out high-quality research is likely to be eligible. If you have any concerns regarding your eligibility to apply we advise that you contact us before completing an application.

The Public Health Research Programme is funded by the NIHR, with contributions from the CSO in Scotland, NISCHR in Wales, and the HSC R&D Division, Public Health Agency in Northern Ireland. Researchers in England, Scotland, Wales and Northern Ireland are eligible to apply for funding under this programme.

4. **Policy or practice engagement and joint funding**

Applicants are strongly advised to consider establishing partnerships with other relevant sectors or organisations to demonstrate they have the full breadth of expertise to carry out their proposed research in their applications to NETS programmes.

Representatives of policy or practice communities relevant to the project should be directly engaged or involved with the development and delivery of PHR research because this produces research that is more closely grounded in, and reflective of, their concerns and makes the subsequent uptake and application of research findings more likely. By policy or practice, we mean any organisation that is involved in shaping policy or delivering public health services relevant to the research, whether at local or national levels. This might include local authorities, charities, voluntary organisations, professional bodies, commercial organisations, governmental and arms-length bodies.

Researchers will wish to consider carefully the nature of any interactions with or engagement of commercial organisations in the research, ensuring appropriate governance arrangements, management of possible conflicts of interest and mitigation of potential reputational risks.

We welcome proposals in which appropriate professionals (e.g. a director of public health or chief executive of a charity) are formally part of the project team as a co-applicant, and in which they play a defined role in the project. Their contribution may be to facilitate or enable research access to organisations, to be directly involved in research fieldwork, to contribute to interpretation of emerging findings, and to be involved in dissemination activity. The time of policy or practice representatives as co-applicants can be costed into the proposal, as part of the Research Costs. As with all members of a project team, an individual’s equipoise should be considered before they are proposed as co-applicant of a research project. Their involvement and associated costs should be fully justified, in the same way as for academic applicants.

There are other ways in which policy or practice representative support for the proposed research can be demonstrated, such as co-opting on to a project advisory or steering group, or the inclusion of a letter or statement of support from a senior policy or practice partner from relevant organisations.

The PHR Programme is also open to the joint funding of research projects with organisations such as charities and the third sector. If you would like to explore the potential for joint funding, please contact us at phr@nihr.ac.uk with details of your proposal and the other funder prior to submission.
5. **Data Protection**

We have an obligation to keep data secure and to use it appropriately. To fulfil our obligations under law and as a result of our contract with the Department of Health, we adopt various procedures to use and protect data. This will impact on how we deal with you and your joint applicants.

The Department of Health, National Institute for Health Research (DH NIHR) is the Data Controller under the Data Protection Act 1998 (‘the Act’). Under the Data Protection Act, we have a legal duty to protect any information we collect from you. You should be aware that information given to us might be shared with other DH NIHR bodies for the purposes of statistical analysis and other DH NIHR research management purposes. NETSCC also reserves the right to share, in confidence, details of your application with other approved research funding organisations outside NIHR in order to coordinate research activity in the UK.

Information collected from you will not be passed to any third party outside the NIHR except specifically as detailed above without your consent except where we are under a statutory obligation or entitled to do so by law. Applicants may be assured that DH NIHR is committed to protecting privacy and to processing all personal information in a manner that meets the requirements of the Act.

6. **Data Security - data about you**

Personal information will be held on a database in the NETSCC password-protected network that is available only to NETSCC staff. Your details and those of your joint applicants will be retained by NETSCC on behalf of the Department of Health to facilitate the running of the PHR Programme. If your application is successful at any stage of our process your name, and the details of the sponsoring organisation, will appear on the PHR website (http://www.nihr.ac.uk/phr). In addition, once funding has been agreed and the contract signed, your details will appear in other literature as a grant holder and will be passed to the Department of Health (DH) for inclusion in their publicly available databases of research projects. Your name and those of your joint applicants will be added to our mailing list. This means that you will be sent updates on all the programmes. We may also send you separate literature about the PHR Programme and related events in medical/health research. If you have any questions, or if you would prefer not to receive routine and/or general communications, please contact us at: phr@nihr.ac.uk.

7. **Research Design Service**

Applicants are recommended to seek advice from suitable methodological support services, at an appropriate stage in the development of their research idea and application. It is advisable to make contact at an early a stage as possible to allow sufficient time for discussion and a considered response.

The NIHR Research Design Service can advise on appropriate NIHR programme choice, and developing and designing high quality research grant applications (http://www.nihr.ac.uk/research-design-service/contact-us.htm).

8. **Clinical Trials Unit Support**
Clinical Trials Units are regarded as an important component of many trial applications, and can advise and participate throughout the process from initial idea development through to project delivery and reporting. However, they may not be essential for all types of studies. If you feel this is the case, please justify the reasons on your application.

If you are looking for a CTU to collaborate with in your application, then the following sources can provide more help:

NIHR CTU Support Funding (http://www.nihr.ac.uk/ctu-support-funding.htm) provides information on units receiving funding form the NIHR to collaborate on research applications to NIHR programmes and funded projects.

The UKCRC CTU Network (http://www.ukcrc-ctu.org.uk) provides a searchable information resource on all registered units in the UK, and lists key interest areas and contact information.

9. The NIHR Clinical Research Network
The NIHR Clinical Research Network (CRN) supports health and social care research both in and outside the NHS. The CRN can support PHR research applications set in specific settings (e.g. prisons, schools, care homes, private providers, participants homes) or the wider physical and policy environments (e.g. transport systems, taxation). The CRN provides expert advice and support to plan, set up and deliver research efficiently. Applicants to the PHR Programme should contact their Local Clinical Research Network who will be able to advise them on the support the CRN may be able to provide.

10. INVOLVE / Public Involvement
The NIHR expects the active involvement of patients and the public in the research it supports, including research undertaken as part of an individual training award. NIHR recognise that the nature and extent of active patient and public involvement is likely to vary depending on the context of each study or award. The term involvement refers to an active partnership between patients, members of the public and researchers in the research process. This can include, for example, involvement in the choice of research topics, assisting in the design, advising on the research project or in carrying out the research.

In this section it is important that you describe in as much detail as possible how patients and the public have been involved in the development of the application as well as plans for involvement in the proposed research. Please note that this section does not refer to the recruitment of patients or members of the public as participants in the research. Further information and resources can be found at the INVOLVE website.

Further information and resources can be found on the INVOLVE website http://www.invo.org.uk/. This includes a detailed definition of patient and public involvement in research, briefing notes for researchers on how to involve patients and the public and an involvement cost calculator and budgeting guide. The NIHR Research Design Service provide advice on developing research applications.
including involving patients and the public and the James Lind Alliance has a step-by-step guide on involvement in research identification and priority setting.

11. Requirements for systematic reviews to be registered with PROSPERO
Applicants undertaking systematic reviews should note the commitment of NIHR to publication in the PROSPERO database. PROSPERO was developed by the NIHR’s Centre for Reviews and Dissemination (CRD), and is the first online facility to register systematic reviews for research about health and social care from all around the world. Access is completely free and open to the public. PROSPERO registration is a condition of NIHR funding for eligible systematic reviews. Link to PROSPERO website:
http://www.crd.york.ac.uk/prospero/.

12. UK Biobank
UK Biobank is a major national health resource, and a registered charity in its own right, with the aim of improving the prevention, diagnosis and treatment of a wide range of serious and life-threatening illnesses – including cancer, heart diseases, stroke, diabetes, arthritis, osteoporosis, eye disorders, depression and forms of dementia. UK Biobank recruited 500,000 people aged between 40-69 years in 2006-2010 from across the country to take part in this project. They have undergone measures, provided blood, urine and saliva samples for future analysis as well as detailed information about themselves. The health of members of this large cohort will be followed over the coming years and the participants have consented to be approached about health research. http://www.ukbiobank.ac.uk/

Applicants are encouraged to consider whether Biobank may be able to provide suitable data for their study. We do not want to discourage establishment of new collections of participants and their data where this is necessary to address the research questions under consideration, our aim is to avoid applications for funding to set up Biobank-like cohorts where the use of Biobank would prevent wasteful duplication of Biobank-like activities.

13. NIHR Carbon Reduction Guidelines
Researchers applying for NIHR funding are asked to consider the carbon footprint of their research and take steps to reduce carbon emissions where appropriate. Advice on how to do this can be obtained from the NIHR Carbon Reduction Guidelines

14. Transparency agenda
In line with the government’s transparency agenda, any contract resulting from this tender may be published in its entirety to the general public. Further information on the transparency agenda is at:
http://transparency.number10.gov.uk/
http://www.ogc.gov.uk/policy_and_standards_framework_transparency.asp
http://www.contractsfinder.businesslink.gov.uk/

15. Governance and Regulation
The NIHR expects applicants to follow ethical guidelines appropriate to the study and setting proposed. We will scrutinise proposed ethics arrangements as part of the assessment of applications. Applicants must either comply with the research ethics framework formulated by the Economic and Social Research Council (ESRC) or obtain approval via the National Research Ethics Service (NRES). [https://www.nihr.ac.uk/funding-and-support/funding-for-research-studies/manage-my-study/governance-approvals-and-registration.htm](https://www.nihr.ac.uk/funding-and-support/funding-for-research-studies/manage-my-study/governance-approvals-and-registration.htm)

A change in the EU Directive 95/46/EC General Data Protection Regulation (GDPR) affects consent conditions for use of data from children within clinical trials where the data is considered identifiable personal data. Currently, trials may use an opt-out strategy for parents (negative assent). When the new directive comes into force in May 2018 positive parent assent will be needed to process the data.

The new directive, which comes into force in May 2018, can be found at: [https://www.eugdpr.org/](https://www.eugdpr.org/). Researchers who think their study protocols may be affected should contact their sponsors for more information and advice.

16. **Reasonable costs and value for money**
There are no fixed limits on the duration of projects or funding and proposals should be tailored to fully address the problem. Research costs are the costs of the research activity itself. These include data collection, analysis, other activities needed to answer the research questions, trial registration (if required) and the salary and indirect costs of staff employed to carry out the research. It is in applicants’ interests to undertake a thorough, realistic and accurate costing. **PLEASE NOTE:** The Public Health Research Programme will fund research costs but NOT intervention or other non-research costs.

17. **Guidance on costings for different types of organisations:**

**Higher Education Institutions (HEIs)**
- Higher Education Institutions (HEIs) should determine the Full Economic Cost (FEC) of their research using the Transparent Approach to Costing (TRAC) methodology. **For HEIs, up to 80% of FEC will be paid, provided that TRAC methodology has been used.**

**NHS bodies and other providers of NHS services in England**
- For applications where the contractor is an NHS body or provider of NHS services in England, up to 100% of direct costs will be paid.

**Other Partner Organisations**
- If you are a commercial organisation/consultancy, please fill in direct costs and commercial indirect costs. Indirect costs should be charged in proportion to the amount of research staff effort requested on the funding application form. Up to 100% of costs will be paid.
- If you are an ‘other partner’ organisation (e.g. charity, local authority representative or NGO), please fill in direct costs and other partner organisations indirect costs. Indirect costs should be charged in proportion to the amount of
research staff effort requested on the funding application form. Up to 100% of costs will be paid.

N.B. For stage 1 applications only the amount of funds being requested should be detailed, for HEIs the 80% FEC figure should be provided. At stage 2 a full budget breakdown will be requested.
18. **Guidance for using the electronic online Stage 1 application form**

**To Access the Application form**

Use the ‘Apply Now’ button on the funding opportunity page on the NETSCC website to access the Stage 1 application form. This also provides call specific supplementary information. This will direct you to the NETSCC MIS login page. If you already have a username (email address) and password, enter these details or, if you have not yet registered, complete the short registration process. You will then be directed to the confirmation page for the specific call. If this is the correct call, click on the Apply button and this will start the application process. Clicking Cancel will return you to your ‘home page’. Applying for a funding opportunity creates a task called ‘Stage 1 Application’. This task will be available for you to complete until the closing date as indicated on the research call and on your tasklist. The ‘Stage 1 Application’ task can be accessed at any time until you either submit the application (using the Submit button in the application process which will appear once all the validation is complete) or the call closes.

See the screenshot example below:

![Screen shot of the application form](image)

Clicking on the **Stage 1 Application** link takes you to the Submit Application main page where you can complete your application information.

This task will be available for you to complete until the closing date as indicated on the research call and on your task.

Seven days prior to the closing date you will receive an email reminder that you have an open application (i.e. not submitted). Additional guidance will be available on most screens as you progress through your application.

The NETSCC MIS can always be accessed directly at [https://netscc-mis.nihr.ac.uk](https://netscc-mis.nihr.ac.uk) for you to go to your homepage where all your applications will be listed.

**To submit an application**

In order to submit a Stage 1 application to the programme you must:
• Complete all mandatory fields. The final review and submit page of the application provides a final check of the mandatory fields as well as providing reminders about optional entries.

• Submit a flow diagram (single-side of A4), as a separate .pdf file, for submission with your application form. This should illustrate the study design and the flow of participants (if appropriate). If the project consists of more than one work package, consider a diagram that conveys the sequence and timing of research packages as well as how the work packages are linked. Applicants should also describe complex interventions and controls as accurately and fully as possible within their diagram. If proposing an RCT, we advise you refer to the CONSORT statement and website for guidance (http://www.consort-statement.org/). Alternatively, you may find the EQUATOR Network website useful (www.equator-network.org). The pdf file must be submitted along with your application form.

• Upload a list of references used throughout your proposal, using either the Vancouver or Harvard referencing conventions (maximum 1 side of A4).

ORCiD

In line with other health research funders, NIHR have recently started implementing a new researcher identifier scheme – ORCiD. ORCID provides a digital identifier that, through integration in key research workflows such as manuscript and grant submission, supports automated linkages between researchers and professional activities ensuring that work is recognised.

Applicants can now update their MIS profile with their ORCiD ID, a process that will become mandatory for all applicants in the future. This ID will only need to be entered once.

To add your ORCiD ID to your MIS contact record, log in to the MIS and go to your profile. Click the link 'View ORCiD record' and follow the on-screen instructions. You will then be returned to the MIS and the profile field for your ORCiD number will automatically be populated. You will only have to do this once.

N.B. For a Stage 2 application this is a mandatory requirement.

Saving your form

As you work through the application, you are asked to save each page. This will save all the information you have submitted so far. You can save the form at any point and leave the application prior to submission. The save button is always located at the bottom of each page of the application. Large text areas on the form also have their own save button beside them. The application task will remain on your home page until complete and submitted or the deadline for the application has passed.

It is important to remember to 'Save' each section as you go through the form before navigating away from the page.

There is a security time out set on the MIS so that after 60 minutes of inactivity, the user will be logged out of the MIS. It is advisable therefore to save your work at regular intervals using the save button on any page. The NETSCC MIS will give you a warning
that you are due to be timed out 10 minutes before it times you out. If this message is displayed, you should close the pop-up.

There is a left hand navigation menu in the application so you can select specific parts of the form to complete, however you should always ensure that you save any information entered on your page before using this left hand menu.

**Giving others access to the form**

- **Joint Lead applicant / Co-applicants:** Access to your application is through your user login to the NETSCC MIS. This should not be shared. The Stage 1 application does not require Joint lead applicant / co-applicants to complete this form. If you want to share your form with your Joint lead applicant / co-applicants, please create a PDF of the form and send it to them. Options to create a PDF are available on the Home page and the Review and Submit page.
- **Signatories:** You are not required to provide signatories for Stage 1 applications.

**Leaving the application task**

You can leave your application task at any time. As long as you have saved any new information you have entered for the application, you can navigate to your home page or log out of the NETSCC MIS system.

**Technical Support**

If you encounter any problems with the NETSCC MIS system, you should call the programme funding support team either via email or by phone. The contact details can be found on the [NIHR website](https://www.nihr.ac.uk).

**Electronic Application form - Learning Guide**

To assist you with completing the application form an in-form learning guide can be accessed by clicking on ‘For help and guidance click here.’ which is located at the top of each page of the application form, under the ‘Instructions’ heading. The learning guide aims to explain each section and provide guidance as to what information is required.

**Space restrictions when entering text**

You should be aware that there are character limits set for each text box within the application form. For larger text areas these are indicated with ‘Limit’ and ‘Remaining’ at the bottom of the text entry box. Please note that the system does not provide a spell checker. Carriage returns and spaces are counted as characters. The character count will be slightly less than that of a Microsoft word character count.

The form counts all blank space as a part of the content of each box, so if you are short of space it will help if you delete extra carriage returns and place any bulleted lists into paragraph format.

**Use of non-standard characters**

You are advised not to use any non-standard characters in your text; in particular, you may experience a technical difficulty that affects the use of these characters ‘<’ ‘>’ ‘≥’ and ‘≤’. The system will currently strip these characters out of the content of the text without warning.
If you need to use these symbols, then please replace them with words (i.e. less than or greater than, or less than or equal to or greater than or equal to). You will not be able to submit the form if you have either of these symbols or any other non-alphabetical or non-numerical characters in your text. For these reasons it is advisable that you either type text directly into the form or ensure these characters are not included in any text that you copy and paste from other documents.

**URL links**

You may wish to include URL links to your application or refer to URL links in a body of your text. You are advised not to use any URL shortening service such as 'tiny.cc' when completing your application. This type of shortening service is associated with hacking and spamming (as it promotes the sending of links that are unclear where they are pointing).

**Technical support documents including how to spell check, resize text boxes and use Mac/iPads and role specific guidance documents (External reviewers, Chief Investigators and Committee members) can be found on the NETSCC MIS web pages at [http://www.nets.nihr.ac.uk/mis/mis-technical-support](http://www.nets.nihr.ac.uk/mis/mis-technical-support).**

**19. Guidance for using the electronic online Stage 2 application form**

**To access the application form for Stage 2 applications only**

If you are applying for a new call e.g. an Evidence Synthesis, you can select the call to which you wish to apply for on the funding opportunity page on the NETSCC website. From within the call details page press the 'Click here to apply' button to access the Stage 2 application form. This also provides call specific supplementary information e.g. the commissioning brief or specification document. This will direct you to the NETSCC MIS login page. If you already have a username (email address) and password, enter these details or, if you have not yet registered, complete the short registration process. You will then be directed to the confirmation page for the specific call. If this is the correct call, click on the Apply button and this will start the application process. Clicking Cancel will return you to your 'home page'.

Applying for a funding opportunity creates a task called 'Stage 2 Application'. This task will be available for you to complete until **1pm on the closing date** as indicated on the research call and on your task list.

If you have been shortlisted from a Stage 1 form:

The 'Stage 2 Application' task can be accessed at any time until you either submit the application (using the Submit button in the application process which will appear once all the validation is complete) or the call closes.

See the screenshot example below:
Clicking on the Stage 2 Application link takes you to the application's main page where you can complete your application information (clicking on this link will not submit an incomplete application).

Additional guidance will be available on most screens as you progress through your application.

The NETSCC MIS can always be accessed directly at https://netscc-mis.nihr.ac.uk for you to go to your home page where all your applications and other tasks will be listed.

**To submit a Stage 2 application**

In order to submit a Stage 2 application to the programme you must:

- Complete all mandatory fields. The final review and submit page of the application provides a final check of the mandatory fields as well as providing reminders about optional entries.
- Submit a Detailed Research Plan, which should:
  - Have a font size of 11 Arial
  - Not exceed 20 A4 pages
  - Have a header containing your allocated project reference number if known
  - Have a footer showing your page numbers
  - Be converted to a .PDF version before uploading it
- Submit a flow diagram (single-side of A4), as a separate .pdf file, for submission with your application form. This should illustrate the study design and the flow of participants (if appropriate). If the project consists of more than one work package, consider a diagram that conveys the sequence and timing of research packages as well as how the work packages are linked. Applicants should also describe complex interventions and controls as accurately and fully as possible within their diagram. If proposing an RCT, we advise you refer to the CONSORT statement and website for guidance (www.consort-statement.org). Alternatively, you may find the EQUATOR Network website useful (www.equator-network.org). The .pdf file must be submitted along with your application form.
• Submit a CTU letter of support if appropriate to the study. This is not a mandatory upload.
• Submit a list of references used throughout your proposal (maximum 3 sides of A4), using either the Vancouver or Harvard referencing conventions. 
• Upload any other requested documents e.g. cover letter, collaborative documents as dictated by the specification of the call.
• Upload a completed Schedule of Events Cost Attribution Tool (SoECAT), which must be signed off by an AcoRD Specialist even where there are no excess treatment costs. Please note that although the on line application form / MIS states that the SoECAT upload is not a required upload this should be ignored, this is a system management rule to enable an application to be submitted where SoECAT signoff may be delayed.

Giving others access to the Stage 2 form

Co-applicants

Guidance for how co-applicants complete their sections can be found at: www.nihr.ac.uk/about-us/documents NETSCC/MIS/MIS-brief-for-Co-Applicants.pdf

Including Joint lead applicant / co-applicants in your Stage 2 application

Access to your application is through your NETSCC MIS user login. This should not be shared. The Stage 2 application is designed as a collaborative submission. As the lead applicant, you can nominate a joint lead applicant / co-applicants to provide their CV information and collaborate on sections of the application. You select the type of access they have to the application. As a result of the nomination, your joint lead applicant / co-applicants will be invited via email to login to the MIS, accept their role and complete their application tasks.

If your application includes a joint lead applicant / co-applicants, you will not be able to complete and submit your application until the co-applicant has provided the information that we require from them.

Once you have completed the details for each joint lead applicant / co-applicant you have to select the option 'notify' on the Research Team Instructions page. This will then prompt an email to be sent to each co-applicant with a task Accept Stage 2 Application Participation (Co-Applicant) for them to approve involvement with the project in question. If the applicant agrees this generates two new tasks which will appear on their homepage.

1) Collaborate on Stage 2 Application (Joint lead / Co-Applicant) which requires the co-applicant to update their CV details.
And the other task:

2) Stage 2 Application, depending on the access permissions granted by the lead applicant, allows the joint lead applicant / co-applicant to read and/or amend any details in the application. It is the responsibility of the lead applicant to ensure that the joint lead applicant / co-applicants complete all the tasks generated.
• Enter co-applicants details accurately as we will use these to contact them (the exact email address used as their MIS username is essential to ensure they receive the automatic communication as part of the application process).

Please make sure that you:
• Allow sufficient time for your joint lead applicant / co-applicants to complete both parts of their task in the online form before the application deadline.

Signatories

Guidance for how co-applicants complete their sections can be found at: https://www.nihr.ac.uk/about-us/documents/NETSCC/MIS/MIS-brief-for-Supporting-Role-Signatories.pdf

Instead of requiring wet ink signatures (for roles such as Sponsor, Department Head, Financial Director, NHS facilities Manager etc.) on a paper copy of the application form, you will be asked to provide contact information (including a valid individual’s email address) about the required signatories for the Stage 2 application so that they can complete their approvals electronically. This process replaces the need for ‘wet ink’ signatures with an electronic version.

For signatories this is a two stage process and requires those nominated to first complete an 'agree to participate' task prior to application submission, followed by a 'confirmation' task immediately after submission of the application.

Firstly, you the lead applicant will be able to 'Notify' the signatories which will automatically invite them via email to register/login to the MIS and accept their role.

Following submission the lead applicant will notify each signatory using the MIS, they will then acknowledge that they have seen and support your completed submitted application in time for the deadline by submitting the 'Provide full application signatures' task. They will be able to see a PDF copy of your completed application via the system.

If you, the lead applicant, are also signing as Head of Department you should not complete this signatory task until you are ready to submit your application form. Once the lead applicant completes the Head of Department signatory task, various fields within the application form will become non-editable.

The Programme acknowledges that it may not be possible for you to obtain confirmation from your Signatories immediately after submission, however; it remains your responsibility to obtain these electronic approvals within two weeks of the submission deadline. You can check that your signatories have completed the approval process on your MIS task page.

Completing the form

ORCiD
In line with other health research funders, NIHR have recently started implementing a new researcher identifier scheme – ORCiD. ORCID provides a digital identifier that, through integration in key research workflows such as manuscript and grant submission, supports automated linkages between researchers and professional activities ensuring that work is recognised.

Applicants can now update their MIS profile with their ORCiD ID, a process that will become mandatory for all applicants in the future. This ID will only need to be entered once.
To add your ORCiD ID to your MIS contact record, log in to the MIS and go to your profile. Click the link ‘View ORCiD record’ and follow the on-screen instructions. You will then be returned to the MIS and the profile field for your ORCiD number will automatically be populated. You will only have to do this once.

N.B. For a Stage 2 application this is a mandatory requirement.

Saving your form

As you work through the application, you are asked to save each page. This will save all the information you have submitted so far. You can save the form at any point and leave the application prior to submission. The save button is always located at the bottom of each page of the application. Large text areas on the form also have their own save button beside them. The application task will remain on your home page until complete and submitted or the deadline for the application has passed.

It is important to remember to ‘Save’ each section as you go through the form before navigating away from the page.

There is a security time out set on the MIS so that after 60 minutes of inactivity, the user will be logged out of the MIS. It is advisable therefore to save your work at regular intervals using the save button on any page. The NETSCC MIS will give you a warning that you are due to be timed out 10 minutes before it times you out. If this message is displayed, you should close the pop-up.

There is a left hand navigation menu in the application so you can select specific parts of the form to complete, however you should always ensure that you save any information entered on your page before using this left hand menu.

Leaving the application task

You can leave your application task at any time. As long as you have saved any new information you have entered for the application, you can navigate to your home page or log out of the NETSCC MIS system.

Technical Support

If you encounter any problems with the NETSCC MIS system, you should contact the programme funding support team via email. The contact details can be found on the NIHR website.
Space restrictions when entering text

You should be aware that there are character limits set for each text box within the application form. For larger text areas these are indicated with ‘Limit’ and ‘Remaining’ at the bottom of the text entry box. Please note that the system does not provide a spell checker. Carriage returns and spaces are counted as characters. The character count will be slightly less than that of a Microsoft word character count.

The form counts all blank space as a part of the content of each box, so if you are short of space it will help if you delete extra carriage returns and place any bulleted lists into paragraph format.

Use of non-standard characters

You are advised not to use any non-standard characters in your text; in particular, you may experience a technical difficulty that affects the use of these characters ‘<’ ‘>’ ‘≥’ and ‘≤’. The system will currently strip these characters out of the content of the text without warning.
If you need to use these symbols, then please replace them with words (i.e. less than or greater than, or less than or equal to or greater than or equal to). You will not be able to submit the form if you have either of these symbols or any other non-alphabetical or non-numerical characters in your text. For these reasons it is advisable that you either type text directly into the form or ensure these characters are not included in any text that you copy and paste from other documents.

URL links

You may wish to include URL links to your application or refer to URL links in a body of your text. You are advised not to use any URL shortening service such as ‘tiny.cc’ when completing your application. This type of shortening service is associated with hacking and spamming (as it promotes the sending of links that are unclear where they are pointing).

Technical support documents including how to spell check, resize text boxes and use Mac/iPads can be found on the NIHR website.

Review and Submit Application

Please ensure that before you submit your application, you have completed the required fields and saved a version of your form. You must submit your application form and flow diagram / references where required, by the stated deadline before 1pm. We are unable to grant any time extensions and the deadline will be strictly observed. You should therefore plan your application carefully. We will not enter into negotiations for extensions.

Stage 1 and Stage 2 applications must be submitted electronically.
Submit your application using the Submit button on the last page of the web form. Please note that the Submit button will not appear unless all necessary sections have been completed. Warning signs (⚠️) may appear to indicate that you may have omitted some information but this sign indicates the information is not mandatory and you can submit without it.

<table>
<thead>
<tr>
<th>✓</th>
<th>Complete</th>
<th>The section/form has been filled out correctly</th>
</tr>
</thead>
<tbody>
<tr>
<td>🚫</td>
<td>Incomplete</td>
<td>Mandatory information has not been provided and the task cannot be submitted until this has been completed</td>
</tr>
<tr>
<td>🚫</td>
<td>Attention</td>
<td>This section has not been completed but is not mandatory</td>
</tr>
</tbody>
</table>

We strongly advise applicants at this point to check that all sections are completed and the correct documents have been uploaded into the system as they cannot be altered once submitted.

Once all sections have been completed and show as green ticks (or as a yellow advisory exclamation mark) a submit button will appear in the top left hand corner of the page and the form can be submitted.

You will then receive an automated confirmation email. If you do not receive an email please contact us immediately as there may be an issue with your submission.

**Un-submitted applications**

Seven days prior to the closing date you will receive an email reminder that you have an open application (i.e. not submitted). The Programme no longer supports ‘rolling over’ of applications to a subsequent call.

**20. Assistance**

If, after carefully reading all the instructions, you still have difficulties completing your application, please visit the PHR Programme website (http://www.nihr.ac.uk/phr) which contains a list of Frequently Asked Questions and Answers. If your particular query or problem is not addressed, please send an email to phr@nihr.ac.uk. Please be aware that while every effort is made to answer queries, if the query is made very near the closing date, the PHR Programme may not be able to provide a considered response. When emailing us please include details of the call which you are responding to, and the name of the lead applicant.