



AMERICAN OSTEOPATHIC ASSOCIATION

TREATING OUR FAMILY AND YOURS

# ONLINE JOINT PROVIDERSHIP APPLICATION SUBMISSION – APPLICANT TUTORIAL

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## TABLE OF CONTENTS

Application System Access & Account Creation .....	2
New Applications for Joint Providership .....	4
Active (current) applications.....	7
Collaboration.....	9
Online System Tips Things to Know .....	10

## APPLICATION SYSTEM ACCESS & ACCOUNT CREATION

- Access the system via the login page by clicking the hyperlink on the osteopathic.org website or in the Educational Plan document.
- It is recommended that you bookmark this page in your internet browser for ease of access.
- If you have already created an account, you may enter your email and password and log in.
- If you need to create an account, you will click on the “**Create New Account**” button.

**NOTE:** *If at any time after creating an account, you cannot remember your password, you may click on the [Forgot Your Password](#) button, enter your email address and will be sent a link to reset your password.*

Logon Page

Email Address\*

Password\*

Log On Create New Account

Forgot your Password?

Welcome to the AOA Online Application and Abstract Submission Program

**New Applicants:** Please click on “Create New Account” to complete the registration process and create your login credentials. **Applicant Tutorial:** Click [here](#) to download this tutorial. This tutorial can help you navigate our site with ease.

**Please note:** Your email address will become your login and only link to a single applicant. If you are submitting applications on behalf of different applicants, you must register each applicant separately using the applicant’s name and a different email address for each individual.

**Returning Applicants:** Please enter your credentials and log in. If you forgot your password, please use the “Forgot your Password” link to the left to reset your password.

**New Reviewers:** Please enter the email and password used to invite you to the online system.

**Returning Reviewers:** Please enter your credentials and log in. If you forgot your password, please use the “Forgot your Password” link to reset your password.

**Application Opportunities:** This online submission program will give you access to several different grant funding opportunities and the abstract submission program. More detailed information is available when you register and take Eligibility Quiz. For return

Grant Management Software provided by Foundant Technologies © 2020

### CREATE NEW ACCOUNT:

- Creating a new account is a multi-step process;
  - Organization Information;
  - User Information (Applicant Information);
  - Executive Officer Information;

**NOTE:** *If your address is the same as your organization, you may use the “[Copy Address from Organization](#) button” to automatically import the organization address in both the User Information “and” Executive Officer sections.*

**NOTE:** The email address entered in the email/username field becomes the Applicant's Username in the system.

**NOTE:** If you need to navigate to the previous section in the registration process, you must use the "Previous" button at the bottom of each section in order for the information entered in registration fields to remain intact. If you attempt to navigate to the previous section by using their browser's "back" button, you will lose all registration information entered.

- Password. Once the password is created, click the "Create Account" button.  
**NOTE:** Password requirements are listed at the top of the section

Password

Passwords must be at least six characters long and may contain capital or lowercase letters, numbers, or any of the following special characters: !@#%&\*()\_

Password\*

Confirm Password\*

< Previous Create Account

#### EMAIL CONFIRMATION:

- Upon clicking 'Create Account', you will be taken to the Email Confirmation page, so you can confirm that you are receiving emails from the system.
- Follow the onscreen instructions and click the "Continue" button to finish the registration process. Now you have an account in this system.
- Please be aware that this is the account that you will use for both present and future applications.

## NEW APPLICATIONS FOR JOINT PROVIDERSHIP

Upon completing registration and accessing the system for the first time, scroll down to the bottom of the page until you see “**AOA Joint Providership Educational Plan**”.

- Click “**Apply**” to go to the applicant dashboard where you can begin to enter the applicant and activity information.

**NOTE:** Please make sure you are entering the information in the “**Contact Info**” tab.

**NOTE:** Please disregard the first information icon ⓘ regarding a “**funder**” as indicated below. This is not applicable to Joint Providership Applications.

### Application

Public Profile Collaborate

Process: AOA Joint Providership Education Plan

Contact Info Request

**Applicant:**  
Ms. Tennille Test  
ttenard00@gmail.com  
312-202-8068  
142 E. Ontario  
chicago, IL 60611

**Organization:**  
AOA  
312-202-8068  
142 E. Ontario  
chicago, IL 60611

Contact Email History

ⓘ If your organization information does not appear correct, please contact the funder. Thank you.

Application Question List

ⓘ Fields with an asterisk (\*) are required.

Participant Information

**Target Audience\***  
Please indicate the audience expected to attend the activity.

DOs/MDs  
 Scientists/Researchers  
 Other

**Physician Specialty (Check all that apply)\***  
Please indicate the specialty of the physicians for whom the activity is specifically tailored.

All Specialties  
 Addiction Medicine  
 Allergy and Immunology  
 Anesthesiology  
 Correctional Medicine

Radiology  
 Obstetrics/ Gynecology  
 Orthopedic Surgery  
 Ophthalmology/Otolaryngology  
 Pain Medicine

- You can update your contact information, and view your email history.  
**NOTE:** To update your organization information, contact the AOA directly.
- If you would like a blank PDF copy of the application, click the “**Question List**” button.  
**NOTE:** The PDF version would be for your records only. You must submit the application for review via the application system.
- Once you have completed the form, you may click the “**Application Packet**” button to download a copy of the questions and your responses.
- Enter the appropriate information into the fields.  
**NOTE:** Any fields with an asterisk are required and must be completed prior to submitting an application.

**TIP:** You may collapse question groups as you go, once you’ve finished all of the questions in that group. Use this as an indicator to yourself that you’ve completed that section to reduce scrolling.

- Some fields have **character limits**.
  - Responses that are longer than the set limit will be saved, **but** an error message will appear informing you that the limit has been exceeded. You will not be allowed to submit the form until the length of the response has been decreased in accordance with the set limit.
  
- **File upload fields** will only accept one file per field (question).
  - Upload fields have size limits. If you attempt to upload a file that is larger than the set MiB limit, you will receive an error message informing you that the file is too large and the file **will not** be saved.
  - The system will only accept Adobe (PDF) files unless otherwise noted. If you attempt to upload an unaccepted file type, you will receive a warning that the file type is not acceptable and you will not be able to upload the file.
  - If the document(s) that need to be attached to your form are not electronic or you need to combine multiple documents into a single file, our online system gives you the option to “Fax to File”. The easy-to-use tool will convert documents from hard copy to digital format as a PDF file.
    1. Click “Fax to File” in the menu at the left side of the screen and read the instructions.
    2. Select “Request Fax #”; a toll-free number will appear on the page.
    3. Load a document, or multiple documents that need to be consolidated into one file, into your fax machine.
    4. Dial the toll-free number. Send a separate fax for each individual file you wish to create.
    5. Select “Finished Faxing” when you are done and to see your list of files.
    6. Once a file has been uploaded, it may be **deleted** by clicking the **red X** next to the file name, and a new file can be uploaded.
  
- As you complete the form, the system will **auto-save** every 100 characters typed, as well as every time you click out of a field.
  - Even though the system is auto-saving, there is still a “**Save**” button at the bottom of the form.
  - When you click save, you are taken to a confirmation page. This will validate that the file was successfully saved.
  - If you click “**Continue**” you will be taken back into the form so you can continue working.
  - If you save and exit the system, you can access the draft application by clicking “**Edit Application**” from your **Dashboard** the next time you log in.
  - Pick back up where you left off by clicking the “**Edit**” link to the right of the request.
  
- When all of the fields are complete, submit the application.
  - If any required fields are not complete, or a response to a text question type is longer than the set limit, the system will not allow the form to be submitted.
  - An error message appears listing the fields that need to be completed or edited. These fields are outlined in **red** to identify the fields that need completion easily.
  - When a form is submitted successfully, the applicant will be taken to a confirmation page.

- When you click “**Continue**” you are taken to your dashboard where you can view your submitted request.

***NOTE:** Once an application has been submitted, you can no longer edit it. If you need to make edits to your application and it is before the deadline, please call staff at (312) 202-8187 or email at [jointprovidership@osteopathic.org](mailto:jointprovidership@osteopathic.org) to request that your application be reopened.*

## ACTIVE (CURRENT) APPLICATIONS

If you have previously submitted or started an application, this page will show as an Applicant Dashboard with your active (current) and historical requests.

- From your Dashboard, click “**Edit Application**” to the right of the request and pick back up where you left off.
- The active request tab houses all current requests. These are the requests still requiring action, (e.g., awaiting a decision, requests that have not yet been marked closed by the site administrator, etc.). Within each request, you can see forms, form statuses, submission dates, and form deadlines (if applicable) etc.

### Applicant Dashboard

Public Profile

**Applicant:**  
Ms Tennille Test  
ttenard00@gmail.com  
[312-202-8068](tel:312-202-8068)  
142 E. Ontario  
chicago, IL 60611

**Organization:**  
AOA  
[312-202-8068](tel:312-202-8068)  
142 E. Ontario  
chicago, IL 60611

[Contact Email History](#)

**!** If your organization information does not appear correct, please contact the funder. Thank you.

Active Requests **1** | Historical Requests **0**

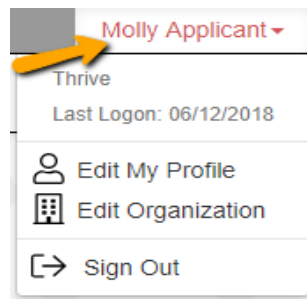
Process: AOA Joint Providership Education Plan			
Application	Draft	01/13/2020	<a href="#">Edit Application</a>
Decision	Undecided		

- You may continue working on saved forms by clicking the edit option next to the form.
- You may view forms that have been submitted but note that once submitted you cannot edit them
- You can see the decision status for the request. The status will be “**Undecided**” until the AOA posts a decision.
- If your application is approved, you will be assigned Follow Up Forms (reports) to be completed and submitted through the system.
  - Follow up forms are completed and submitted like all the other forms in the system.
  - If you have been assigned multiple follow up forms, you must complete them sequentially **by due date**.
  - Follow up forms that are past due will be marked as such:
    1. If the past due message is reflected in **orange**, you may still submit the form.
    2. If the past due message is reflected in **red**, you no longer have the option to submit the form. If you feel that this is an error, please call staff at (312) 202-8187 or email [jointprovidership@osteopathic.org](mailto:jointprovidership@osteopathic.org).

### Follow Up Forms

FORM NAME	ASSIGNED TO	AWARD / INSTALLMENT	DUE DATE	STATUS	EDIT/VIEW
Award Agreement	Molly Applicant	Overall Award	05/31/2018 <span>Past Due</span>	Assigned	<a href="#">Edit</a>

- Denied applications and applications marked closed by the AOA, are housed in the Historical Request tab.
- If you wish to edit your account information or change your password, click your name in the top right. This will expand a drop-down menu. Click “Edit” my profile, to update your user information or change your password. Be sure to click save in the bottom right once you have finished.



- Please note, that you will be automatically logged out of the system after 90 minutes of inactivity (you will receive a warning message when there are 10 minutes remaining).



## COLLABORATION

The Collaborator feature allows you and someone else to work together on a single request.

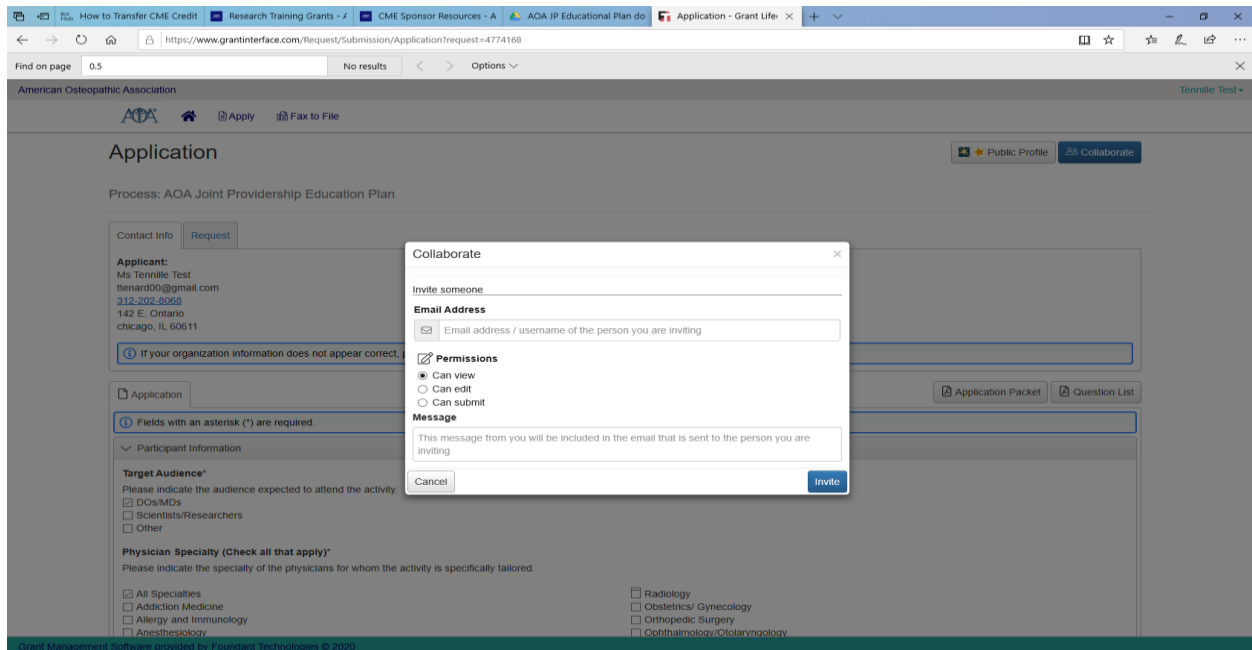
Once you have started a request you will see the Collaborate button at the top of the page. This can be used to invite other people to work on this request.

From the Collaborate pop up, enter the email address of the person you would like to invite and set the permission you would like the collaborator to have (either View, Edit, or Submit). Lastly, include a message and click **“Invite”**.

An email will be sent to the collaborator containing your message, their username, and a link to the logon page. After clicking this link the collaborator will be brought to the logon page. If this is their first time logging into the system, they will be asked to create a password.

After logging into the system, the collaborator will see this request under the Collaboration Requests tab of their Applicant Dashboard. Here they can select the edit form link and start collaborating on the document.

The Collaborator will have access to all forms within the request. This includes applications and all Follow Up Forms that have been assigned to the applicant.



## **ONLINE SYSTEM TIPS THINGS TO KNOW**

1. The character counter includes spaces as well as characters.
2. A user will be automatically logged out of the online system after 90 minutes of inactivity. The user will receive a warning message at 80 minutes of the pending time out. Working on a form without saving does not count as activity.
3. Please remember to regularly save your work. The system will auto save every 20 minutes.
4. You may choose to prepare your response in a document outside of the online system (e.g. Microsoft Word) and then copy and paste the text into the online form. If you prepare your application in this way, be sure to keep track of character limits. As noted above, character limits include spaces and characters. We recommend that you do not use formatting tools, as available in Microsoft Word, because the formatting will likely not transfer to the response area when pasted into the online system.
5. It is advisable to download copies of all submitted forms to your computer.
6. If you do not provide an answer for one of the required questions, you will not be able to submit your application.
7. If your PDF upload file exceeds the maximum file size, consider using the Adobe Acrobat option to 'Reduce File Size'.
8. Remember to click "Submit Form" when you are finished.
9. Remember once your application has been submitted it is no longer available for editing. If you need to make a correction to a submitted form, call staff at (312) 202-8187 or email [jointprovidership@osteopathic.org](mailto:jointprovidership@osteopathic.org).