

APPLICANT ONLINE GRANT SYSTEM TUTORIAL

TABLE OF CONTENTS

SITE ACCESS & ACCOUNT CREATION	2
APPLYING FOR FUNDING	4
COLLABORATION	6
YOUR APPLICANT DASHBOARD.....	7
UPLOADING FILES	8
ONLINE SYSTEM TIPS THINGS TO KNOW.....	8

SITE ACCESS & ACCOUNT CREATION

- You will access the system via the login page.
- The AOA may have provided you with a link to this page, or it may be hyperlinked on the osteopathic.org website.
- It's 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 can't 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

The screenshot shows the AOA Logon Page. It includes an 'Email Address*' field with the text 'gdillard@osteopathic.org' and a 'Password*' field with masked characters. Below these fields are two buttons: 'Log On' and 'Create New Account'. A blue arrow points to the 'Log On' button, and a red arrow points to the 'Create New Account' button. A link for 'Forgot your Password?' is located below the 'Log On' button. On the right side of the page, there is a scrollable information box titled 'Welcome to the AOA Online Application Submission Program'. This box contains several sections: 'New Applicants' with instructions on registration, 'Please note' regarding email addresses, 'Returning Applicants' with login instructions, 'New Reviewers' with invitation instructions, 'Returning Reviewers' with login instructions, and 'Application Opportunities' regarding grant funding.

CREATE NEW ACCOUNT:

- Creating a new account is a multi-step process;
 - Organization Information;
 - User Information (“Principal Investigator (PI) or 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 pull the address information from the organization address fields into the address fields in this section.

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.

- In the next section, you will indicate if you are the Organization’s Department Chair.
 - If you are the Department Chair select “Yes.” You are taken to a section of optional fields that includes only the fields that were not required in the “User Information” section.
 - If you are not the Department Chair select “No,” and enter the Department Chair information.
- Once the Department Chair’s information is entered, click the “Next” button to create a password.
 - Password requirements are listed at the top of the section.
- Once the password is created, then click the “Create Account” button.

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, and remember, this is an account that you will use for both present and future applications.

APPLYING FOR FUNDING

Upon completing registration and accessing the system for the first time, you will land on the **Applicant Dashboard**. This page will show your Active Requests and Historical Request. If you've been provided an **access code**, you may enter it in the upper right-hand corner to reveal the opportunity you have been invited to apply to. If you do not have any Active Requests, click **“Apply”** to begin the application process.

The screenshot shows the Applicant Dashboard for Ms. Gloria Dillard MPH. It includes fields for Applicant and Organization information, a message about organization information, and buttons for Active Requests and Historical Requests. A green arrow points to the 'Enter Access Code' field.

- To start a request click on the blue **“Start Eligibility Quiz”** button under the opportunity to which you'd like to apply. You can preview the eligibility quiz by clicking on the **“Preview”** button.
- Clicking on the **“Start Eligibility Quiz”** will take you through a series of questions to determine your eligibility for the designated opportunity. If you submit the eligibility quiz and it is determined that you are not eligible for this particular opportunity, but you know that you are eligible, then call Gloria Dillard, MPH, Assistant Director of Grants at (312) 202-8006 or email at gdillard@osteopathic.org.

The screenshot shows the Eligibility - Research Dissemination Travel Award application page. It includes a list of opportunities with 'Preview' and 'Start Eligibility Quiz' buttons. A blue arrow points to the 'Preview' button for the 'Eligibility - CO'RE REMS Host Application' and a brown arrow points to the 'Start Eligibility Quiz' button for the same opportunity.

Once in the actual application, note that your contact information and organization information automatically populates at the top of the form.

- You may also update your contact information, and view your email history.
NOTE: To update your organization information contact the AOA directly.
- If you would like a PDF copy of the application, you can click the **Question List** button.
- Once you've completed the form, you may click the **Application Packet** button to download a copy of the questions and your responses.

NOTE: if the form has a specific deadline, it will be listed at the top.

- Depending on the application, you may or may not be able to submit after the deadline has passed.
 - If the past due message is reflected in orange, you may still submit the form.
 - If the past due message is reflected in red, you no longer have the option to submit the form.
 - If you are not allowed to submit, you will receive a message should you attempt to submit.

Work your way through the form, responding to the fields.

- Any fields with an asterisk are required fields 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 and 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 the 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.
 - 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 the you that the file is too large and the file **will not** be saved.
 - The system will only accept pdf file types unless otherwise stated.
 - If you attempt to upload an unaccepted file type file type, you will receive a warning that the file type is not acceptable and you will not be able to upload the file.
 - 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 ensure you 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 will access the **draft of the form** 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 Gloria Dillard, MPH, Assistant Director of Grants at (312) 202-8006 or email at gdillard@osteopathic.org to request that your application is reopened.

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, Set the Permission you would like the collaborator to have, either View, Edit, or Submit. Lastly, include a message and select 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.

YOUR APPLICANT DASHBOARD


Your dashboard houses current and historical requests.

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 and submission dates and, form deadlines (if applicable).

▼ Fall Grant For Book Funding

Process: Base Camp Example Process

Application	Draft	07/24/2018	Edit Application
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 Reports (Progress and Financial Reports) to be completed and submitted through the system.

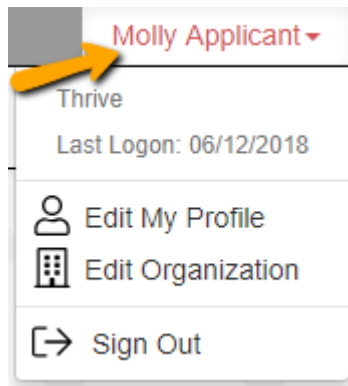
- Follow up reports are completed and submitted just like any other form.
- If you have been assigned multiple follow up reports, you must complete them sequentially by due date.
- Follow up reports that are past due will be marked as such.
 - If the past due message is reflected in orange, you may still submit the form.
 - 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 Gloria Dillard, MPH, Assistant Director of Grants at (312) 202-8006 or email at gdillard@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 Past Due	Assigned	Edit

Denied applications and applications marked closed by 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).

UPLOADING FILES

In general, the acceptable file types for uploading files are: Adobe PDF (PDF) files unless otherwise noted.

- Only one file can be uploaded per question. Multiple documents must be combined into one file and then uploaded.
- 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 a 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.

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. Once your application has been submitted it is no longer available for editing. If you need to make a correction to a submitted form, contact Gloria Dillard, MPH, Assistant Director of Grants at (312) 202-8006 or email at gdillard@osteopathic.org.