

Application instructions for the Action Medical Research and LifeArc Joint Call

When preparing your application please adhere to this guidance – applications that are late, incomplete or do not follow the guidance may be rejected.

You should read all instructions before starting the application - you may find it helpful to print a colour copy for reference. Frequently asked questions can be found at the end of this file.

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THE APPLICATION PROCESS OVERVIEW

You should complete the web form including your supporting documents by the deadline of **Wednesday 22nd November 2023 by 5pm. Earlier applications are welcomed.**

The form includes a section for files you will need to upload (including the translational research questions template, finance template and further details of Principal Applicant and Co-applicants template). These templates and other important documents you need to refer to (such as the example research agreement and grant policy) are available via a link in the invitation to apply email sent to the Principal Applicant. Guidance on how to complete the templates is below on pages 4-8 in this instruction file.

The web form is completely separate to the main charity website and you can only access the form via this link: <https://actionmedicalresearch-applications.org.uk/project/init.pl>

Signature pages: You should send the signed further details of the Principal Applicant and Co-applicants page and Excel finance sheet to us by 6 December 2023. See pages 8-9 for more information.

Data Protection

Unless otherwise agreed, all information that the applicants and/or Institution supply to the Charity relating to any applications or Grants awarded will be used for the purposes of processing the Application and/or Grant and for the purpose of peer review, audit and/or evaluation. All Shared Personal Data will be processed in accordance with Data Protection law. Data supplied in the application relating to the applicant(s) and/or individuals funded by the Grant may be used by the Charity for the purposes of grant administration. It may also be disclosed to and processed by external peer reviewers, government and other research and professional bodies including potential joint funding partners.

Please scroll down

HOW TO COMPLETE THE WEBFORM

! This section contains important information. The Principal Applicant should **Register** the full application at <https://actionmedicalresearch-applications.org.uk/project/init.pl>

The Principal Applicant can give the login details to team members but **only one person should be in the webform at any one time to avoid overwriting what the other has entered**. A password reset function is also available on this login screen.

Applications list screen

Click **New** on this screen to begin your form. Once the application is started you can:

View your answers, **Continue** to the application form, **Save & Exit** the application form

Or 'change your password'.

Do **not** click **Delete all** as this will delete the application permanently

If you need to PRINT a basic copy of your answers this can be done via a button on the **View** screen. Note you can only access the view button when the website is open for applications.

Navigating around the form

! Don't use the back button on your browser – please use the **Previous**, **Next** and **Save & Exit** buttons to move around the form. If you enter a page of information and then click the back button on your browser then you may **lose the information** typed on that page. Please complete the required fields first. These mandatory fields allow you to save all other answers on that page.

Save & Exit allows you to continue at a later time. When logging back in click on continue and **Do not press the Delete all button!**

Structure of the webform and import requirements

Some fields are required fields or have validation rules to enable successful importing into our database. Required fields on the webform are marked with an *. The form will not allow you to progress to another section and may delete information that you have entered if these fields are not correctly completed. If this happens a **red** error message will appear near the top of the screen, which indicates which question needs to be corrected.

- **Part A** covers basic details of the application. Required fields: Question A1 and question A2 – Project length (in months) and amounts requested from the charity for this project.
- **Parts B1 to B9** cover Principal and Co-applicant contact details. There is space for a maximum of eight Co-applicants. Please leave blank any Co-applicant sections you do not require. Applicants must be employed at a UK research institution such as a university or a hospital. Collaborators from outside the UK or not based at UK research institutions (including any patient representatives) can be named in part C of the form and their letters of support submitted as described later in these instructions. Required fields: The Principal Applicant name, contact institution, address details and email address (**questions B1, B4, B5 and B6**).
- **Part C** contains questions about the details of the application including a non-confidential lay statement (non-scientific description suitable for members of the public).

- **Part D** is the file upload section where you upload your completed additional files. **Required fields:** The finance file and translational file must be uploaded.
- **Part E** is a **checkbox (required field)** confirming that once the **Submit form** button has been clicked no further changes to the application can be made online.

The Review button and the Submit form button

At the end of section E there is a button called **Review** which allows you to carry out a final check before submitting your application. At the end of the review screen there are two buttons:

- The **Edit form** button returns you to the questions screen so that you can amend your answers
- The **Submit form** button **submits the application. Only click submit form when you are sure your application is ready for submission.** Once submitted no further changes can be made online. If a half-completed application is submitted, it will be deleted from our system and then will need to be re-entered.

Once the application is submitted the website will send a copy of the application as a PDF. A word/pdf format that is easier to read (including the additional files submitted to us) will be produced by our database for the referees.

Symbols on the form

- ? can be clicked on to display additional help

Characters/symbols and the return key (new paragraph) not accepted by the online form

! Please note that some characters/symbols are unfortunately not accepted by this version of the online form. Please separate information using punctuation such as commas, full stops, colons and the space bar. Do not use the return key (carriage returns for a new paragraph) as unfortunately when we download into our database the carriage returns are automatically removed.

Standard bullet points are accepted by the form but **please avoid unusual symbols such as**

Less than or greater than symbols < >

the euro sign €.

The apostrophe ' that is under the @ is accepted but a similar character on the top left of the keyboard may not work.

The files that you upload to the application form in Part **D** eg the translational research questions document **can** include these symbols and carriage returns.

Maximum field lengths

Estimated word counts or character counts are given on some fields. This is normally based on 7 characters to a word. Spaces are counted as characters. Characters beyond the limit in the form can be rejected by the form.

Uploading files including the translational research questions document, finances and further details of Principal Applicant and Co-applicants file

-Please label your files with short descriptive names eg 'translational research questions or 'finances' or 'publication'. Excessively long file names (such as publication titles) cause errors.

-Where possible it is preferable that we receive files in portrait orientation so that we can combine them into one file for the reviewers.

-PLEASE ONLY SUBMIT ONE COPY OF EACH FILE

How to upload files in part D of the webform

Click choose file and select the file you wish to upload. Click UPLOAD to upload the file. If the file has successfully uploaded a green message displaying the filename will appear. You will not be able to click into the file but can upload the file again if you are unsure whether you have uploaded the final version

You can only upload Word documents (.docx), Excel spreadsheets (.xlsx), Adobe PDFs and JPEG files.

Instructions for completing files that MUST be uploaded to your application

If these are not included your application will be considered incomplete

❑ 1. TRANSLATIONAL RESEARCH QUESTIONS DOCUMENT

Please name the file as 'translational research questions'

Please refer to the **guidance for translational research questions document** on how to complete these questions. You will also need to discuss your feedback comments with LifeArc to help with completing this section.

Please use a font that is easy to read (minimum 1½ line-spacing, not smaller than size 12 font, margins not less than 1.5cm). Full references can be provided as an annex to the application form (one page maximum). If you have pictures, diagrams, preliminary unpublished data or other essential information necessary for the application these can be included as an appendix. The document and appendix can be submitted as one file. Where possible please keep the file size below 5MB. If possible please use portrait orientation so we can file combine all parts of the application. **Applications that do not follow this page layout may be withdrawn.**

Please save images that you add as PNG files (this should retain more detail and be easily viewed) or JPG files. JPG may cause loss of detail on images with high contrast areas (such as text), although if you save at a high quality setting (90 to 95 will still reduce file size) then this will be less of a problem.

❑ 2. FINANCES SHEET

! Please complete the supplied Excel template only – please don't tamper with the Excel template as it won't transfer properly into our system if modified. Please submit your Excel Finance sheet as a .xlsx file

! Please see the 2 pages of instructions at the top of the finances sheet about research costs.

! Important note regarding approval from your Institution

You should check the finances on your Excel finance sheet as soon as possible with your Research Services Office. You will need to send the "Example research agreement" (includes conditions under which a grant is awarded and conditions for making a grant application) and "MRC Good research practice- principles and

guidelines” documents to your Research Services Office along with your application. The invitation to apply email we sent to the Principal Applicant contains a link to these files.

Please note, if applicable, a SoeCAT form may also be required. This calculates the different activities and costs associated with clinical research – see point 11 below for further information.

❑ 3. Further details of the Principal Applicant and Co-applicants including previous Action Medical Research grants awarded in the last 10 years -please use the supplied Word template only – please upload as a Word file.

The template is available via the weblink in the email to the Principal Applicant. All applicants will need to enter details so we recommend you read/circulate the templates as early as possible. Where possible please avoid leaving large chunks of white space after answers.

For information about the signatures process – see pages 7-8

❑ 4. If a research worker is known and would be funded by the project, please add their name on the finance sheet and complete and upload the document Research Worker details form.

Please do not include Research Worker details form for applicants as these are covered already in the Further details of the Principal Applicant and Co-applicants file. If the research worker is not yet known this is not applicable.

❑ 5. Salary scales – please ONLY send the page of the scale that is relevant to the salaried research worker(s) on the application. If you do not have a copy of the relevant scale please speak to your research support team or finance office.

❑ 6. Collaborator letters If the application includes collaboration with other researchers/groups/patient representatives please provide signed letter(s) of support – if possible please combine letters in one file.

❑ 7. The charity will only support the use of animals where no viable alternative exists. The application must have regard to animal welfare and advances in the refinement, replacement and reduction of animal use.

Where the Research Program involves the use of animals, you will need to provide a Justification for the use of animals document (1-2 sides of A4). Please refer to the guidance details below before answering the questions at the bottom of this section.

The Applicant shall ensure:

- a) animals are only used in the Research Program where this is essential, and the research question being addressed cannot be answered using alternative methods;
- b) any part of the Research Program involving the use of animals is designed and implemented so that:
 - (i) the experimental design is appropriate and is likely to answer the research question;
 - (ii) the least sentient species with the appropriate physiology is used;
 - (iii) animals are appropriately housed and maintained in a species-appropriate manner that minimises stress and maximises the animals’ welfare;
 - (iv) the number of animals used is the minimum sufficient to provide adequate statistical power to answer the questions posed; and
 - (v) the severity of procedures performed on animals is kept to a minimum. To that end, experiments should be kept as short as possible and appropriate anaesthesia, analgesia and humane endpoints should be used to minimise any pain and suffering;
- c) all activities involving animals comply with the core principles set out in the cross-funder

- guidance 'Responsibility in the use of animals in bioscience research: Expectations of the major research councils and charitable funding bodies' (available at www.nc3rs.org.uk);
- d) all activities involving non-human primates comply with the 'NC3Rs Guidelines: Primate accommodation, care and use' (available at www.nc3rs.org.uk);
- e) advice is sought from NC3Rs (www.nc3rs.org.uk) and/or other appropriate animal welfare bodies in relation to the requirements set out in (b) to (d) above and Applicant shall promptly provide Action and LifeArc with details of such advice and how such advice has been implemented;
- f) when animals are purchased from commercial suppliers, UK suppliers are used wherever possible, to minimise the risk of suffering during transport;
- g) compliance at all times with the provisions of the Animals (Scientific Procedures) Act 1986 (as may be amended or supplemented from time-to-time) and any advice, guidance or requirements received from the relevant ethics committee, NC3Rs and/or other appropriate animal welfare body
- h) all necessary licences, consents and approvals have been received before any work requiring such licenses, consent and/or approval is initiated;
- i) results arising from animal-based studies are reported in accordance with the ARRIVE guidelines (www.nc3rs.org.uk/ARRIVE) as far as possible, taking into account the specific editorial policies of the journal concerned;
- j) any new procedure likely to replace the use of animals in research or testing, reduce the numbers used or refine animal use for the same is promptly reported to NC3Rs and disseminated through the usual channels to all those who might make use of it; and
- k) any substantive changes to animal species and/or experimental design from that set out in the Application, must be notified to Action and LifeArc, together with any advice/suggestions in relation to the same obtained from any ethics committee, NC3Rs and/or other animal welfare body, before such changes are implemented.

Please provide a Justification for the use of animals document (1-2 sides of A4) and include all of the following information:

- i. Home Office licence numbers (institute, project and personal) covering the procedures outlined.
- ii. Have the necessary approvals been given by an Animal Welfare and Ethical Approval Body?
- iii. The types of animals to be used, numbers involved and costs.
- iv. The source of animals and how they will be transported and maintained.
- v. The severity of the procedures (mild/moderate/severe) and further details of any moderate or severe procedures (no more than 250 words).
- vi. An explanation of why alternatives, such as human tissue or other approaches, cannot be used, plus evidence that the species chosen is appropriate and the minimum number of animals will be used to give statistically valid results. Please give details of any sample size calculation and statistical advice sought.

List of files that you CAN include in your application

These files may enhance your application if you can include them. We understand it isn't always possible to obtain these documents prior to a grant being awarded but if the application is successful you would have to supply them before the grant is activated.

❑ **8. A copy of your written ethical approval letter as granted by your ethical committee if applicable to the proposed research. You may not be able to include this if you are in the process of applying or you are not yet able to apply.** Please contact your Head of Department or the university/hospital research services department if you are unsure whether you need to supply this document. Do not upload ethics application files, just the approval letter if you have one.

❑ **9. A sponsor letter (if applicable) for the proposed research from your institution.** Research that involves the NHS, for example patients, patient data, human participants, human tissue or human cells, requires a formal sponsor willing to take primary responsibility for monitoring and enforcement of the UK Policy Framework for Health and Social Care Research. Sponsorship may be dependent on gaining ethical approval, but we still need an appropriate organisation, such as a UK university or NHS trust, to confirm that they will act as sponsor. Action Medical Research is a funder not a sponsor. Please contact your university/hospital Research Services department if you are unsure whether you need to supply this document.

The link below provides a more detailed explanation of what a sponsor is. This policy framework sets out principles of good practice in the management and conduct of health and social care research in the UK.

<https://www.hra.nhs.uk/planning-and-improving-research/policies-standards-legislation/uk-policy-framework-health-social-care-research/>

❑ **10. If applicable, a copy of the front page ONLY of the APPROVED home office project licence.** Please contact your Head of Department or the university/hospital research services department if you are unsure whether you need to supply this. Note: Do not upload the *application* for a Home Office licence.

❑ **11. If applicable, a SoECAT form. Please download the SoECAT HRA export file and upload to your grant application.** This may or may not apply to your research proposal, further guidance can be found at <https://www.nihr.ac.uk/researchers/i-need-help-costing-my-research/> and <https://www.nihr.ac.uk/documents/online-soecat-guidance/30396>

If relevant, you should discuss this with your Finance Department and local AcoRD specialist.

Researchers applying for clinical research funding need to complete a Schedule of Events Cost Attribution Tool (SoECAT) to be eligible for the National Institute for Health Research (NIHR) portfolio and the support this provides. This change came into effect on 1 October 2018. SoECAT is designed to make sure costs are attributed in line with the AcoRD framework and that this is consistent across the UK.

You must complete a SoECAT if:

- you are applying for clinical research funding
- you will carry out your research in the UK
- your research will use NHS resources
- your research requires Health Research Authority approval

You must complete a SoECAT even if you don't think your clinical research will involve excess treatment costs (ETCs).

These are the steps you need to take when you apply for a grant that includes clinical research:

- Complete a SoECAT, which you can complete online from the NIHR website <https://www.nihr.ac.uk/documents/online-soecat-guidance/30396>

You will need to create an account if you haven't already got one at [Identity Gateway \(nihr.ac.uk\)](https://nihr.ac.uk). Once your account is active follow the "Apply for a service for a new study" pathway.

- Get your form signed off by an AcoRD specialist. There are different ways to contact a specialist, depending on where you are in the UK:
 - o England: [NIHR website](#)
 - o Scotland: [NHS Research Scotland website](#)
 - o Wales: email research.fundingsupport@wales.nhs.uk
 - o Northern Ireland: [HSC R&D division website](#)

You should contact an AcoRD specialist as early as possible in the application process.

- Download the SoECAT HRA export file and upload to your grant application. We may ask for the full form later in the application process.
- If we award you a grant you must tell your AcoRD specialist. In England, very expensive ETCs may need further assessment by an NHS panel.

12. If needed, a copy of a supporting publication in press (up to two publications ONLY)

Please use short file names to avoid errors.

13. Other supporting documentation (such as pilot data) may be included. Please keep this concise and relevant to your application.

List of files that we definitely DON'T want in your application

- DON'T** send multiple copies of each file
- DON'T** send a covering letter unless you have an important point to address
- DON'T** send a copy of your application for a Home Office licence or application for ethical approval
- DON'T** send CVs of any applicants who are not the salaried research worker on the application
- DON'T** send full economic cost documents or other internal university/hospital research forms
- DON'T** send volumes of extra information. We will not accept excessive additional information. Our external advisors have limited time to read applications.

Note about videos in applications: Videos are currently discouraged due to problems with large file sizes and also because reviewers may not have the software to open the files. If a video is really needed then they should be brief, relevant and in a format that can easily be opened by most computers.

What happens after you submit your online form

Once your application has been submitted the Principal Applicant will receive an email containing a PDF of your webform answers for your files. *Please let us know if this email does not reach you as it may mean that the application has not been processed.*

How to submit your signatures

Two signed documents should be submitted as part of your application.

- **Further details of the Principal Applicant and Co-applicants** Ideally, we would prefer all signatures on one page but if you have a large number of Co-applicants in very separate UK locations, we accept separate signature pages provided the name of the Principal Applicant is clearly marked on the document.

- **Finance file** - A copy of the finance sheet must be signed by the officer responsible for administering grants.

Please submit signatures by 6 December 2023. We accept scanned signatures as uploaded files during the application process or scanned copies of the signature pages emailed to applications@action.org.uk after application submission. There is no need to re-send the whole application.

Who can sign the finance file as the Head of Department?

The person(s) responsible for the allocation of resources and staff for the project can sign as Head of Department. Typically, this would be the Head of Department but in some circumstances the acting Head of Department can sign. If the applicant is also the Head of Department they can sign provided they have responsibility for the resources required to complete the project including their own time.

What happens after your application has been received

Over the next few months Action Medical Research will carry out a full peer review process. We will contact the Principal Applicant by email if further information is required. The outcome will be sent to the Principal Applicant by email.

Action Medical Research Contact details

Email: applications@action.org.uk Phone: 01403 210406 and press 5 for Research
Office hours: Monday - Friday 9am to 5pm

FREQUENTLY ASKED QUESTIONS/TROUBLESHOOTING

Login problems I've tried everything and I can't get my password to work- what should I do?

- Please check that you are using this website <https://actionmedicalresearch-applications.org.uk/project/init.pl> (This is not the main charity website).
- If you 'copy and paste' your password and your password is not recognised by the system it may be some extra white spaces were caught on the end of the copy. Please try again ensuring that white spaces are not included. The password is case sensitive if you prefer to type it in.
- If the issue is not resolved please contact us.

Calculating finances Should I use current or future salary scales? Please calculate your finances in accordance with the salary scale that would be relevant at the time the research would start if awarded as this reflects the cost of the research to the Charity. Your finance team will help and they can include an estimate for nationally agreed cost of living awards if appropriate. A likely start date for awards from this round would be between September 2024 and January 2025.

What costs can I apply for? 2 pages of detailed instructions about eligible costs are given on the first two pages of the excel finances sheet. Please scroll up to the top of the spreadsheet.

Uploading files Should I upload Word files, Excel files or PDF files? Please send the further details document as a Word file (.docx) and the finances file as an Excel file (.xlsx). Most other documents are usually submitted as Word or PDF files. Please don't submit multiple copies of different file types.