AIMS
Applicant user guide to the online application system
April 2016, v1.0

This user guide is for applicants applying for funding from the Health Foundation using AIMS, our new online application system. We are piloting this system and welcome any feedback that will help us improve AIMS or this user guide. Please contact us at AIMS@health.org.uk to share your comments.

Only applications submitted through AIMS.health.org.uk will be considered. Please access all the supporting information documents from our website before using AIMS, and have these to hand when you are completing your application. Please also familiarise yourself with AIMS at an early stage of your application, as we may not be able to respond to all technical queries close to the deadline for applications. We will however endeavour to resolve all technical issues in a timely fashion.

If you have a technical issue (eg problems with registering and logging in, or confusing error messages) please contact us at AIMS@health.org.uk and we will aim to resolve these within five working days. If you have queries about the programme or the application process, then please refer to the specific programme supporting information documents or contact the programmes team, whose contact details can be found in the programme guidance. Each programme has two key documents: Notes for applicants and Frequently asked questions.

Key tips:

- AIMS is designed to run on any computer and internet browser, but we recommend that you use the latest version of Firefox.
- You can also access this applicant user guide at any time by clicking on the 'Help' link at the top of the page.
- Please register with the contact details of the person who should receive all the information regarding the application.
- If you are applying on behalf of an organisation and registering for the first time, please tick the 'Register with Organisation' box and, when you are directed to the AIMS home page, register with the details of the organisation via the 'Contacts' tab. Otherwise, you will not be able to apply on behalf of the organisation.

Step 1: Register as a new user

Before you can apply for a programme, you must register as a new user with AIMS. You only need to do this the first time you use the system. After that, you can log in with your email address and password.

To register as a new user, please go to AIMS.health.org.uk and click on the 'Register' button at the bottom of the page, as shown below.

Key tip: Please register with the contact details of the person who should receive all the information regarding the application.

This takes you to the new user registration screen, as shown below. Please enter the information requested, noting that if a question has a red asterisk at the end, this is a mandatory field and you will not be able to continue until you have entered this information.

Key tip: If you are registering to apply for an individual fellowship such as an Improvement Science Fellowship, or for Q, please do not tick the 'Register with Organisation' box. This is because these programmes only accept applications from individuals.

If you are registering for any other programme, such as our Efficiency Research Programme or Innovating for Improvement:
- please ensure that you are registering with the email address of the person who should receive all correspondence for the application
- please tick the 'Register with Organisation' box when registering; this is because these programmes only accept applications from organisations (not individuals).

Register

First names: *	
Last name: *	
Email: *	
[i] Enter a valid email address	
Password: *	
[i] Passwords must be at least 8 characters long, and contain at least 1 digit, and at least 1 upper or lower case character	
Password Confirmation: *	
Register with Organisation	☑

If you are applying for a fellowship or for Q, please do not tick this box.
For all other programmes, please tick the 'Register with Organisation' box.:

OK

* required

Step 2: Select the programme you would like to apply to

Once you have registered with the email address of the person who will receive all correspondence for the application, you will be directed to the AIMS home page.
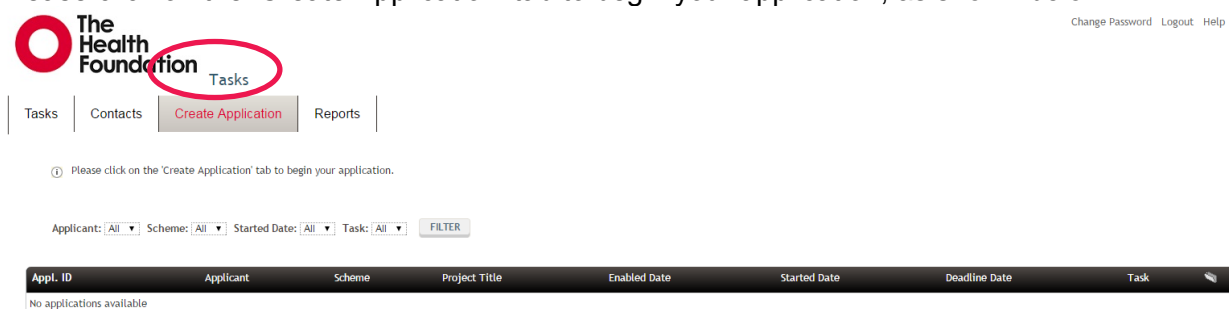
There are two pathways to the application form (option A or option B) depending on which programme you are applying for.

Option A: If you are applying for an individual fellowship, such as Improvement Science Fellowships, or for Q – please refer to page 4.

Option B: If you are applying for a Health Foundation programme on behalf of an organisation, such as our Efficiency Research Programme or Innovating for Improvement – please refer to pages 5–7.
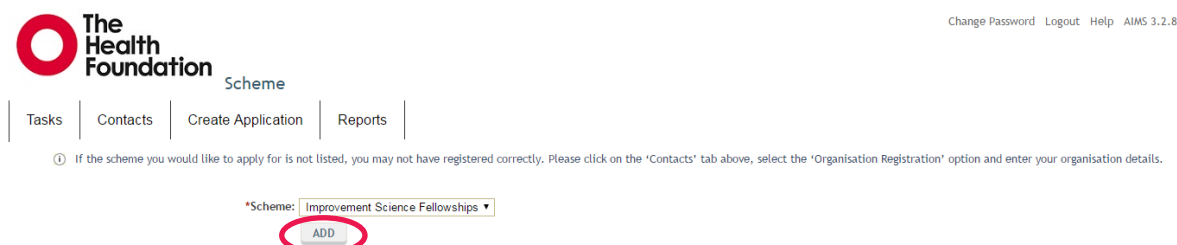
Option A: If you are applying for an individual fellowship, such as Improvement Science Fellowships, or for Q

Please click on the 'Create Application' tab to begin your application, as shown below.

Select the scheme you would like to apply for and click on 'Add', as shown below.

If you select a scheme that is not currently open, you will see the following screen.

Please now go to page 8 for the next step in the process – **Step 3: Complete the application form**.

Option B: If you are applying for a Health Foundation programme on behalf of an organisation

If you are applying for a programme such as our Efficiency Research Programme or Innovating for Improvement, please first register as an organisation by clicking on the 'Contacts' tab, and then click on 'Organisation Registration' in the drop down menu, as shown below.
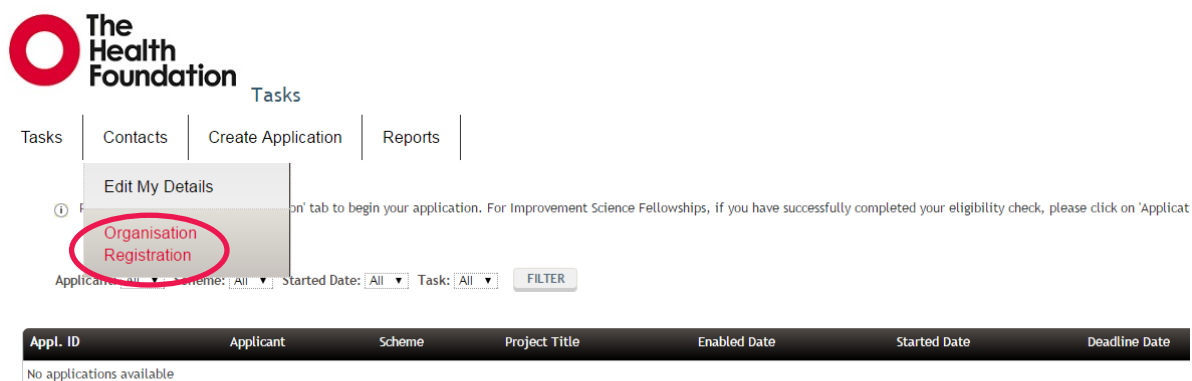
First search for your organisation to ensure it is not already in our database. You can do this by entering the organisation name in the search box and clicking on the 'Search' button, as shown below. Please make sure that you have not included any abbreviations in your search and you know the exact name of your organisation, otherwise there may be a risk that you create a duplicate organisation.

If you cannot see your organisation in the list that is returned, then please create a record for the organisation. To do this, click on the underlined 'Create Organisation' link, as shown overleaf.

Enter the contact information for the organisation, using the registered head office address where possible, and click on the 'Save' button, as shown below.
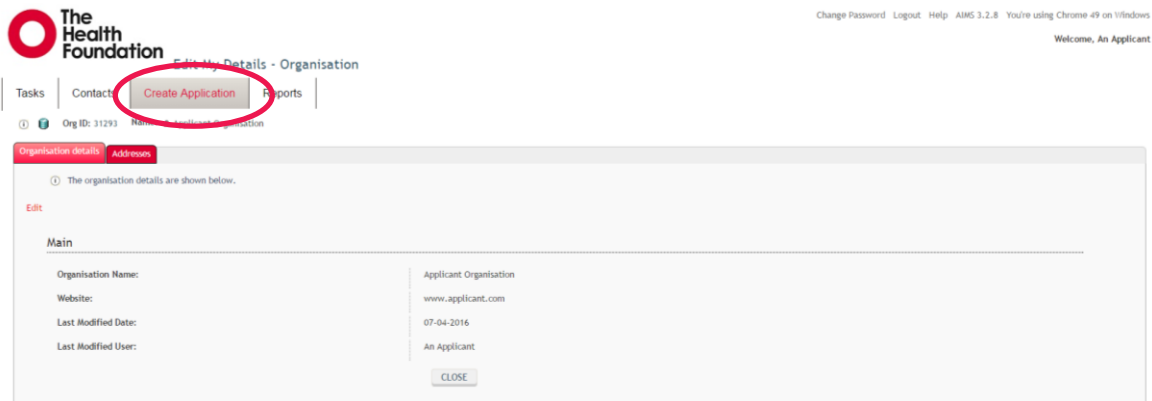

Once you have successfully registered the organisation, you will see the screen overleaf. Please click on the 'Create Application' tab at the top of the menu to begin your application.

You will need to select the organisation that you are applying on behalf of. This will then give you access to the relevant applications. You can see this in the 'Party Name' column. To select the organisation, click on the underlined 'Select' link at the end of the row, as shown below.
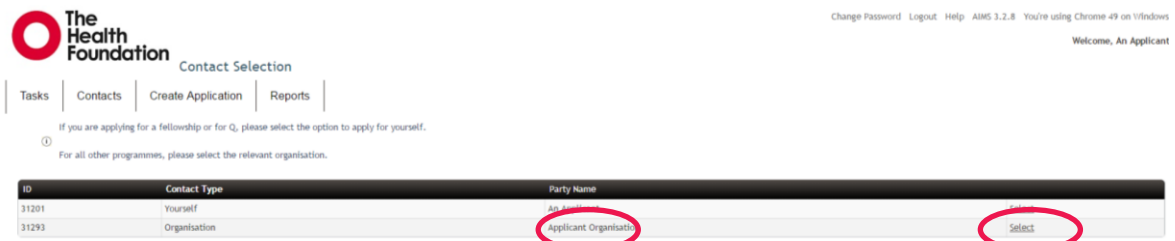
Once you have selected this, choose the programme you would like to apply for from the drop down menu and click on the 'Add' button, as shown below. This will send you to the application form.
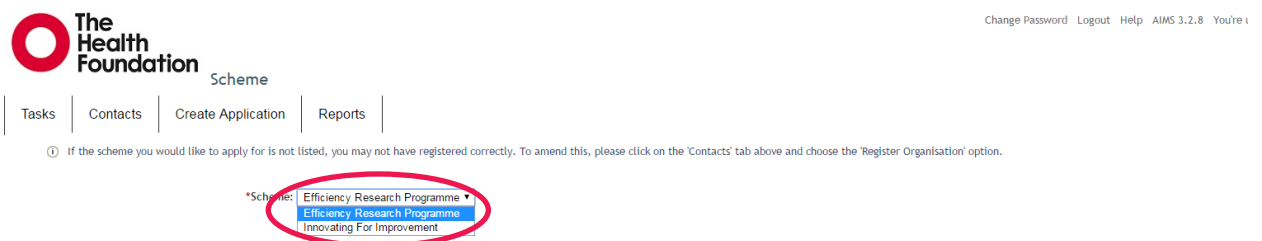
If you select a scheme that is not currently open, you will see the following screen.
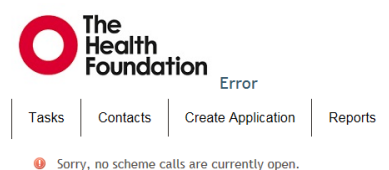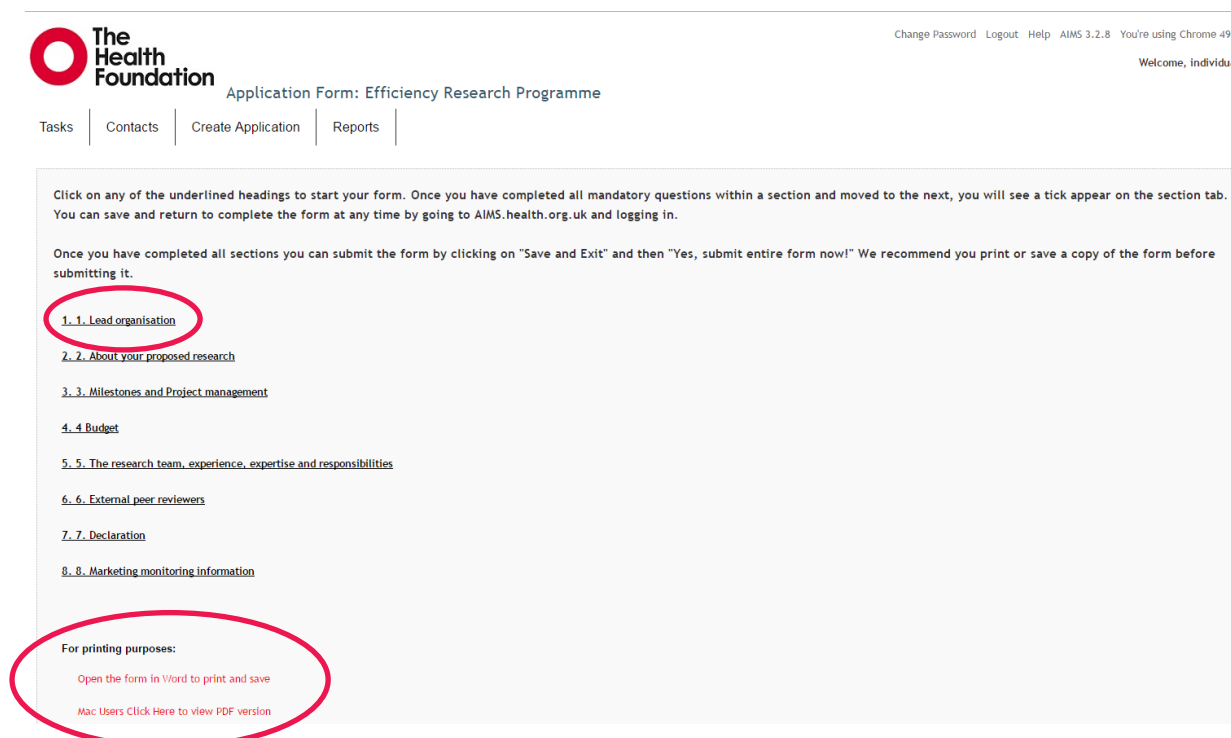
Step 3: Complete the application form

A: Navigating through the application form

Once you have selected the programme you wish to apply for, you will then be directed to the application form landing page. You can click on any of the underlined headings to go to a section, but we recommend starting with section one and proceeding section by section. You can review your document any time in Microsoft Word or as a PDF by clicking on the links at the bottom of the application contents page. This is all shown below.

You can draft your answers in the Microsoft Word document and then copy them across in unformatted text to the online application form later if you choose.

Each section links to the specific programme supporting information documents at the top of each tab. You can also access this applicant user guide at any time by clicking on the 'Help' link at the top of the page. This is shown below.

At the bottom of each section are three options, as shown below.
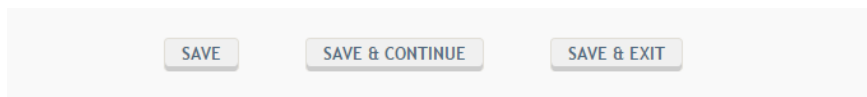
Save – This saves the section you are working on and you remain on the same section.
Save & Continue – This saves the section you are working on and moves you to the next section.
Save & Exit – This saves the section you are working on and takes you to the submission screen where there is also the option to exit the application and log out of AIMS. If you take this option you can log in to continue with your application at a later date by going to AIMS.health.org.uk and logging in as an existing user.

Key tip: The application automatically saves at regular intervals but we would advise that when completing long sections, or if you need to leave your online application for any period of time, that you manually save your progress.

B: Completing the application form

You should answer every question in each section before moving to the next section. If a question has a red asterisk at the end of it (as shown below), this indicates a mandatory question. You will not be able to submit your application until you have entered all mandatory information.

Once all mandatory questions have been answered you will see a grey tick on the tab, as shown below.
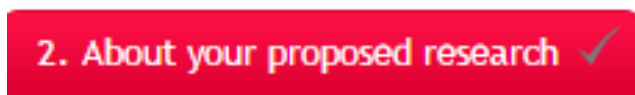
Alternatively, you can return to the application contents page at any time by clicking on the 'Return to Index' link to review which sections of your application are complete. You can also navigate through the form by clicking on the relevant underlined section, or in the form itself by clicking on the relevant red tab, as shown overleaf.

C: Specific question guidance

Uploading supporting documents

You can see the specific requirements underneath the question where you upload the document. Please take note of the **maximum number** of files that can be uploaded, the **maximum file upload size** and the **allowed file types**, as shown below, and ensure you upload the correct type and size of document. Please select 'Save' or 'Save & Continue' at the bottom of the page to ensure the file is attached correctly.

Budget questions
Certain budget questions contain calculation fields which calculate and automatically populate the relevant answers. These look different to the white answer fields as they are greyed out, and you will not be able to type over these (as shown below).

Save and add questions
Some questions have the 'Add' button, which is a multi-function button. To save the information entered in these fields, please click on the 'Add' button by scrolling to the far right of the question. **If you do not do so after entering each row of information, the data will not be saved.** You will notice that a new blank row appears each time you save information. Please ignore this row as it will be automatically removed at a later stage. The saved data will be greyed out, as shown overleaf.

D: Submitting your application for assessment

Once you have completed all the mandatory questions in all sections, you can submit your application form. To submit your application, you can either select the 'Save & Exit' button, or go to the last section of the form and click on the 'Save & Continue' button, which will direct you to the submission screen, which can be seen below.

We highly recommend that you save a copy of your application before submitting it by clicking on the relevant link, as shown below. Please note that Mac users can only select the PDF option.

Once you are ready to submit your appliction, select the 'Yes, submit entire form now!' button. To continue working on the document, choose 'No, enter more details first'.

If you have not completed all the mandatory questions, the following screen will appear showing you which questions need to be answered. Please print a copy of this list, or make a note of the questions, and go back to the application form to complete these questions.

To go back to the application form to complete these mandatory questions, you can either click the back button on your browser, or click on the 'Tasks' tab at the top right. This redirects you to the AIMS home page, which shows a table of oustanding tasks. To return to the application form, click on the underlined link in the 'Task' column, as shown below.

If you have logged out before completing your application, you will also be able to access your application form in the same way next time you log in.

Once you have successfully submitted your form, you will be sent back to the AIMS home page and a message will appear on screen confirming that your form has been submitted successfully. You will also receive a confirmation email.
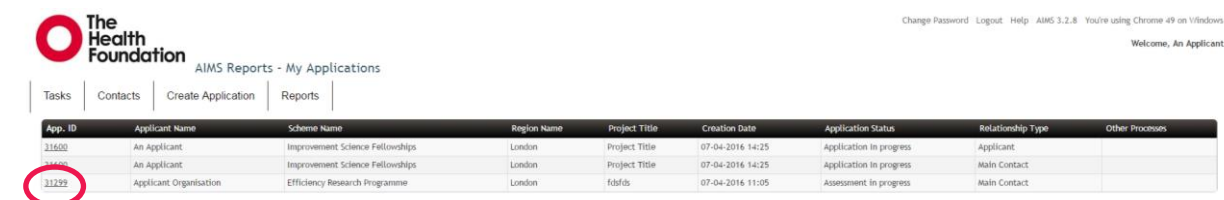
E: Viewing your application after submission

If you would like to go back to your application after submitting it, please click on the 'Reports' tab and then click on 'My Applications' in the drop down menu, as shown below.
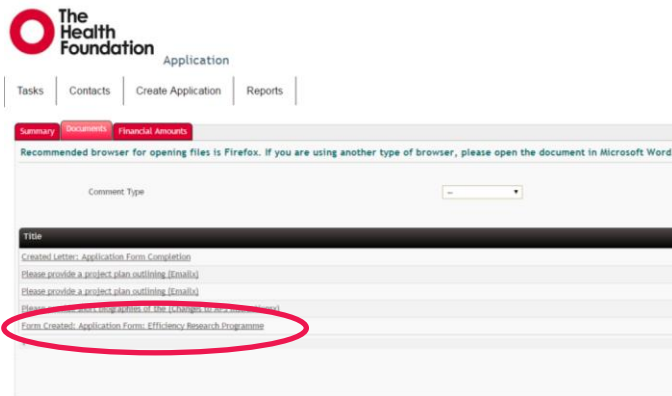

Then select the relevant application by clicking on the underlined unique application ID, as shown below.

Then open the document with the title 'Form Created: Application Form: [Name of the programme to which you have applied]', as shown overleaf. This will open the form in a new window for you to view or print.

Please contact us at AIMS@health.org.uk if you have any questions about AIMS or if you would like to make any comments to help us improve this applicant user guide.

Good luck with your application!