

AIMS

Applicant user guide to the online application system

October 2018, v5.0

This user guide is for applicants applying for funding from the Health Foundation using AIMS, our online application system. We welcome any feedback that will help us improve AIMS or this user guide. Please share your comments with the programme team.

Only forms submitted through <https://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 form, as we may not be able to respond to all technical queries close to the deadline for forms. We will however endeavour to resolve all technical issues in a timely fashion.

We aim to resolve all technical issues (e.g. not able to submit a form) within five working days. If you need to log a technical issue, or have any queries about the programme or the process that cannot be answered by the specific programme supporting information documents, then please contact the programme team, whose contact details can be found in the programme guidance.

Key tips:

- We recommend that you save the AIMS online application system address into your favourites so it is easy to access, and use the latest version of Firefox or Chrome.
- Please register with the contact details of the person who should receive all the information regarding the form.
- 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.
- To access your form after logging back in, please click on the Task 'Application form submission' link in the Task column for the relevant form, as seen in Section 3B.

Contents

Step 1: Register as a new user

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

You will be directed to select one of the following options in the supporting information and guidance. Please ensure you are familiar with this before creating a form on AIMS.

Option A: If you are applying for an individual fellowship, such as GenerationQ or Q.

Option B: If you are applying for a large Health Foundation programme on behalf of an organisation or a team, such as our Behavioural Insights or Advancing Applied Analytics programmes.

Option C: If you are applying for a small Health Foundation project on behalf of an organisation or a team, or submitting a tender response.

Step 3: Complete the form

A: Navigating through the form

B: Returning to your form

C: Specific question guidance

D: Submitting your form for assessment

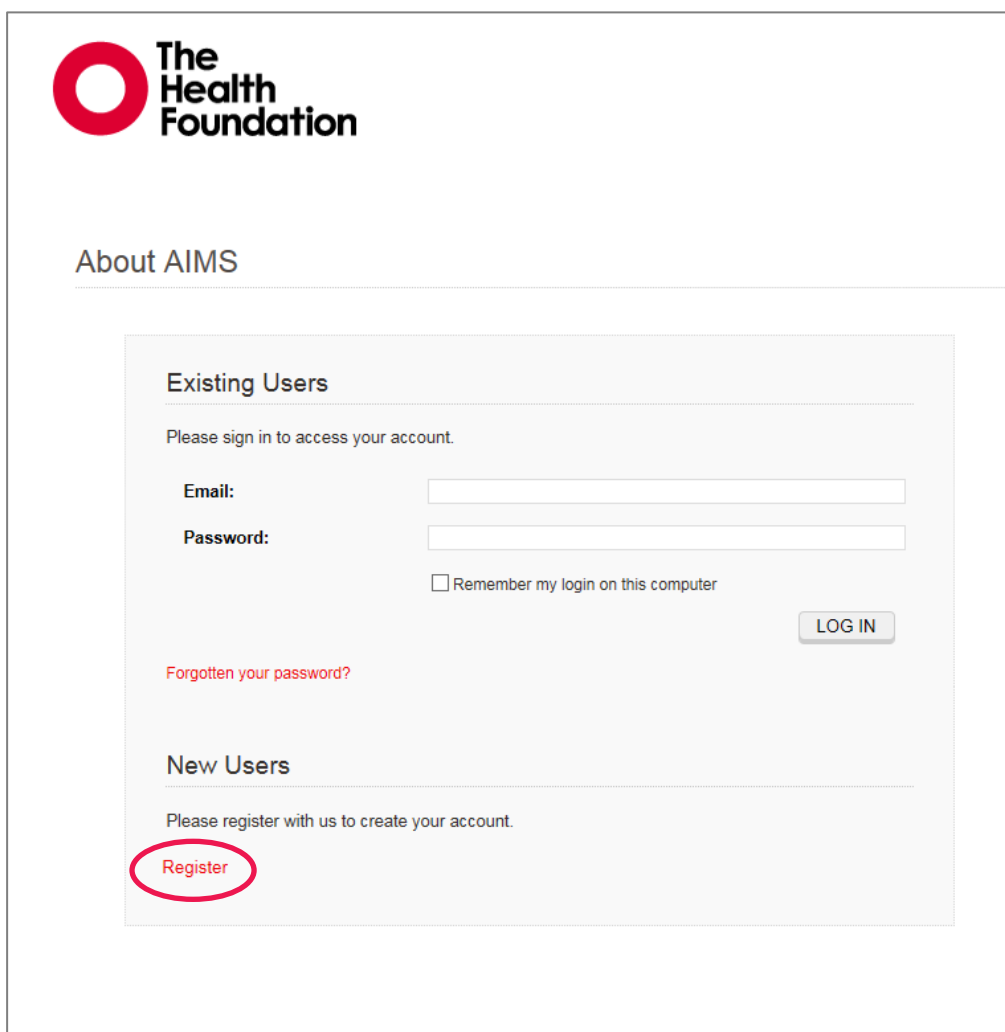
E: Viewing your form after submission

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 <https://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 form.



The screenshot shows the AIMS login and registration interface. At the top left is the logo for The Health Foundation, consisting of a red circle with a white dot inside, followed by the text "The Health Foundation". Below the logo is the heading "About AIMS". The main content area is divided into two sections: "Existing Users" and "New Users". The "Existing Users" section has the instruction "Please sign in to access your account." and contains input fields for "Email:" and "Password:", a checkbox for "Remember my login on this computer", and a "LOG IN" button. Below this is a link "Forgotten your password?". The "New Users" section has the instruction "Please register with us to create your account." and a "Register" button, which is circled in red.

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 GenerationQ or Q, please do not tick the 'Register with Organisation' box. This is because these programmes only accept forms from individuals.

If you are registering for any other funding programme or project, or submitting a tender response, please ensure that you are registering with the email address of the person who should receive all correspondence for the form. To do so, please tick the 'Register with Organisation' box when registering; this is because these programmes only accept forms 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.: ☒

*** required**

OK

Once you have done so, click on the 'OK' button.

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 form, you will be directed to the AIMS home page. There are three pathways to the form (option A, B or C). You will be directed to select one of the following options in the supporting information and guidance. Please ensure you are familiar with this before creating a form on AIMS.

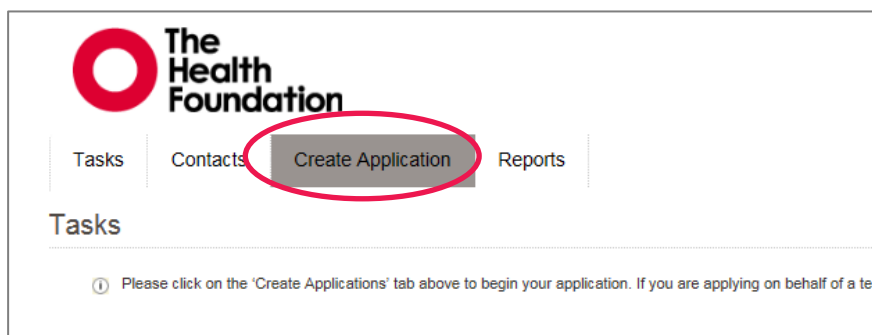
Option A: If you are applying for an individual fellowship, such as GenerationQ or Q, refer to the bottom of this page, page 5.

Option B: If you are applying for a large Health Foundation programme on behalf of an organisation or a research team, such as our Behavioural Insights or Advancing Applied Analytics programmes, refer to page 6 – 8.

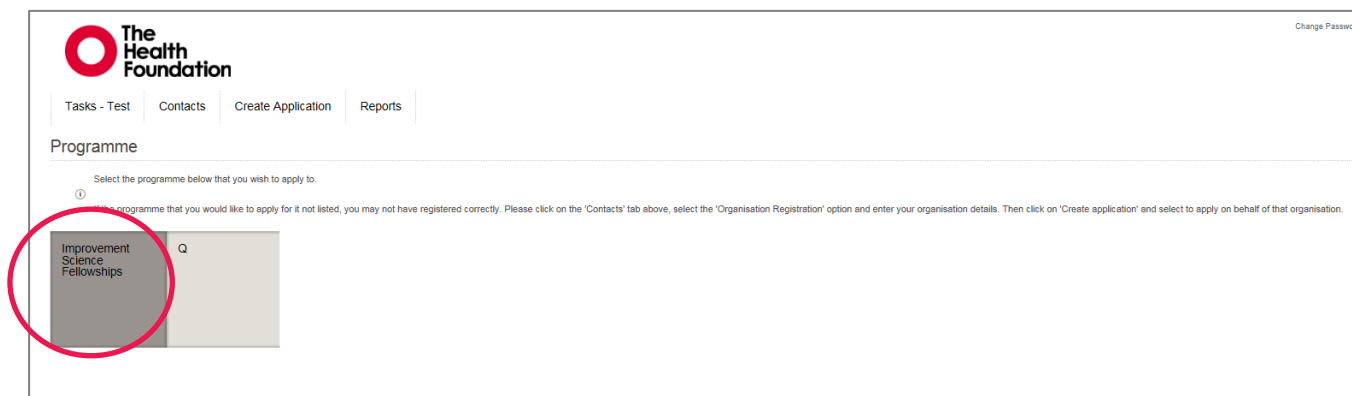
Option C: If you are applying for a small Health Foundation project on behalf of an organisation or a team, or submitting a tender response, refer to page 9.

Option A: If you are applying for an individual fellowship, such as GenerationQ or Q

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



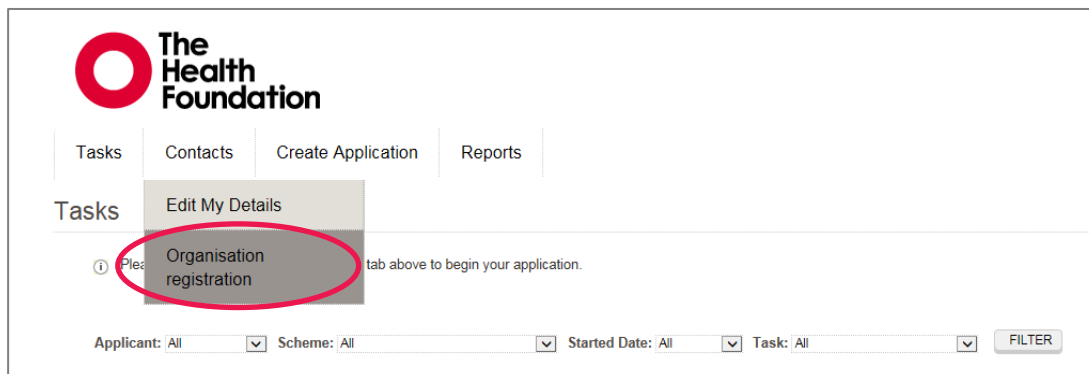
Select the scheme you would like to apply for by clicking on the relevant tile, as shown below.



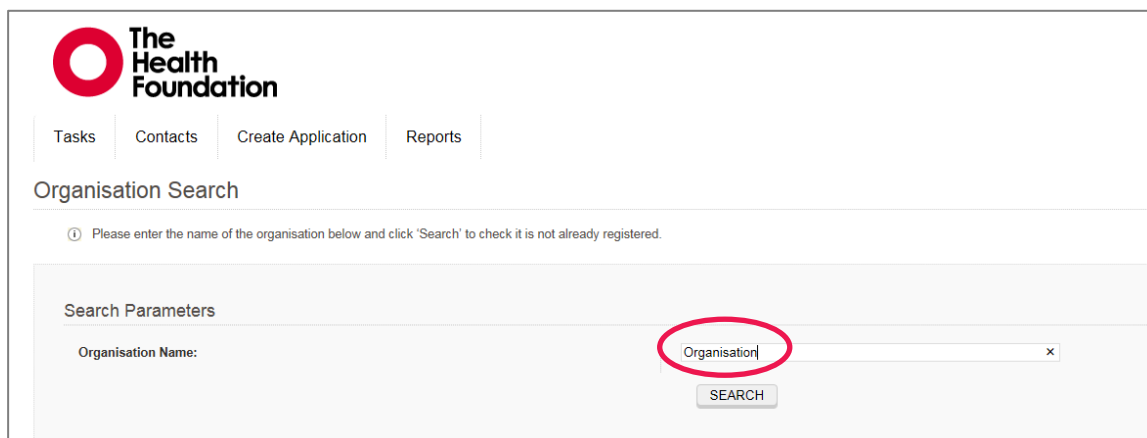
Please now go to page 10 for the next step in the process – **Step 3: Complete the form.**

Option B: If you are applying for a large Health Foundation programme on behalf of an organisation or a research team, such as our Behavioural Insights or Advancing Applied Analytics programmes


If you are applying for a programme on behalf of an organisation, you will first need to register to apply on behalf of that organisation. To do this, click 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.



Tasks | Contacts | Create Application | Reports

Organisation Search

❗ Scroll down to see results or click here

❗ Please enter the name of the organisation below and click 'Search' to check it is not already registered.

Search Parameters

Organisation Name:

Application ×


SEARCH

[Create Organisation](#)

Organisation Name ▲	Full Address
No organisations were found for the information you entered - Create a new organisation by clicking on 'Create Organisation'	

Create Organisation

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



Tasks | Contacts | Create Application | Reports

Edit My Details - Add Organisation

Organisation details

❗ Please enter the details for your Organisation. Click the "Save" button below to create the organisation or click the "Close" button to return to the Organisation search.

Main

Organisation Name: *

Website:

Address

Address Line 1: *

Address Line 2: *

Address Line 3:

Address Line 4:

Country: *

Region:

Postcode: *

Main Address:

Applicant Organisation

Building 1

A Road

A City

England ▼

East of England ▼

POST CODE

☒

SAVE CLOSE

* required

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 form.

You will need to select the organisation that you are applying on behalf of. This will then give you access to the relevant form. 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.

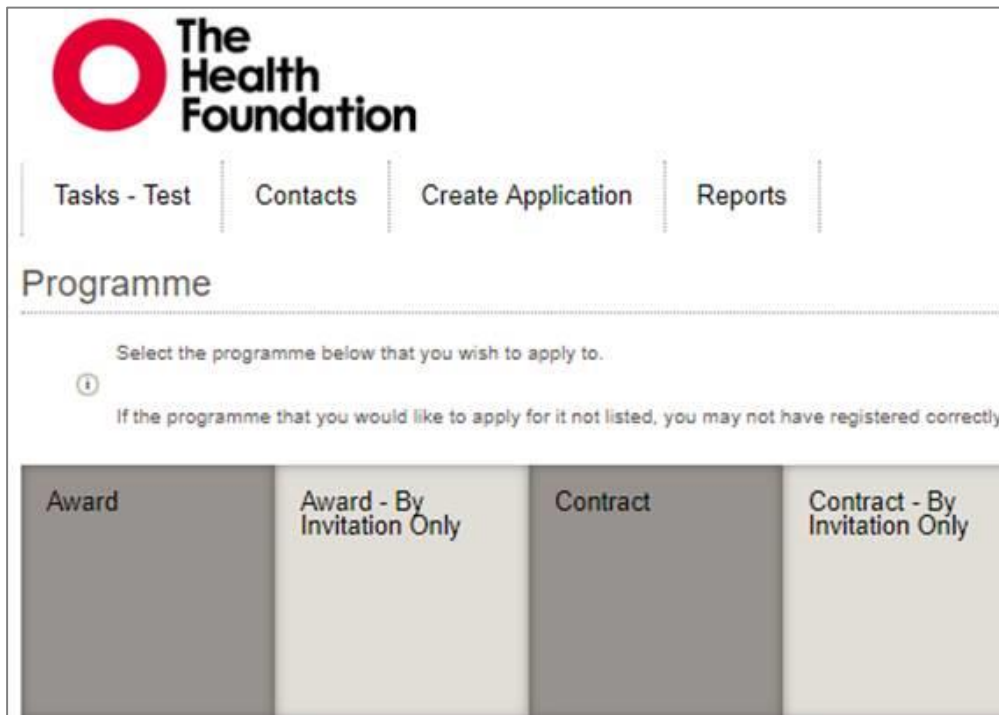
ID	Contact Type	Party Name	Action
31201	Yourself	You	Add
31293	Organisation	Applicant Organisation	Select

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 form.

Option C: If you are applying for a small Health Foundation project on behalf of an organisation or a team, or submitting a tender response

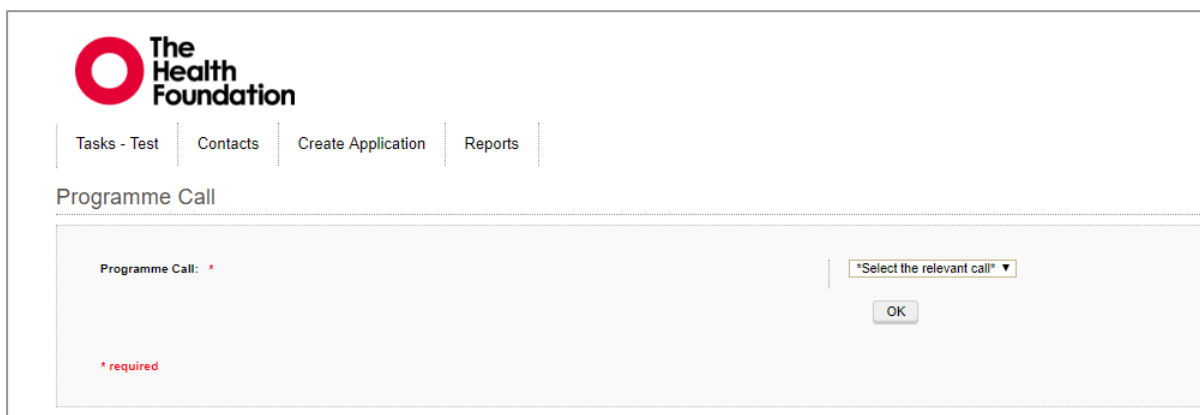
Follow the steps for Option B above, from page 6 – 8

When you come to select the form, select one of the options below as directed.



The screenshot shows the 'The Health Foundation' logo at the top left. Below it is a navigation bar with four tabs: 'Tasks - Test', 'Contacts', 'Create Application', and 'Reports'. The 'Create Application' tab is selected. Below the navigation bar is the heading 'Programme'. Under this heading, there is a text prompt: 'Select the programme below that you wish to apply to.' followed by a small information icon and a note: 'If the programme that you would like to apply for it not listed, you may not have registered correctly.' Below this text are four rectangular buttons: 'Award', 'Award - By Invitation Only', 'Contract', and 'Contract - By Invitation Only'.


On the next screen, click into the drop down menu and select the call name in the drop down for 'Programme call', as directed



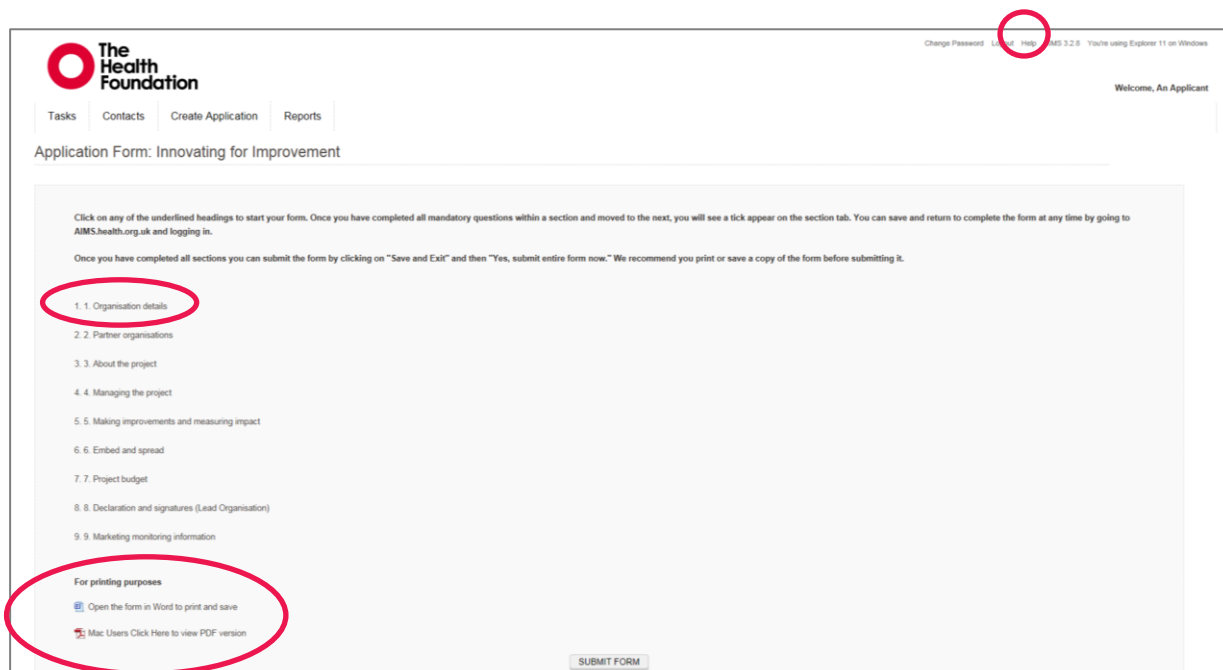
The screenshot shows the 'The Health Foundation' logo at the top left. Below it is a navigation bar with four tabs: 'Tasks - Test', 'Contacts', 'Create Application', and 'Reports'. The 'Create Application' tab is selected. Below the navigation bar is the heading 'Programme Call'. Under this heading, there is a form field labeled 'Programme Call: *' with a red asterisk indicating it is required. To the right of this field is a dropdown menu with the text '*Select the relevant call*' and a downward arrow. Below the dropdown menu is an 'OK' button. At the bottom left of the form, there is a red asterisk followed by the text '* required'.

Step 3: Complete the application form

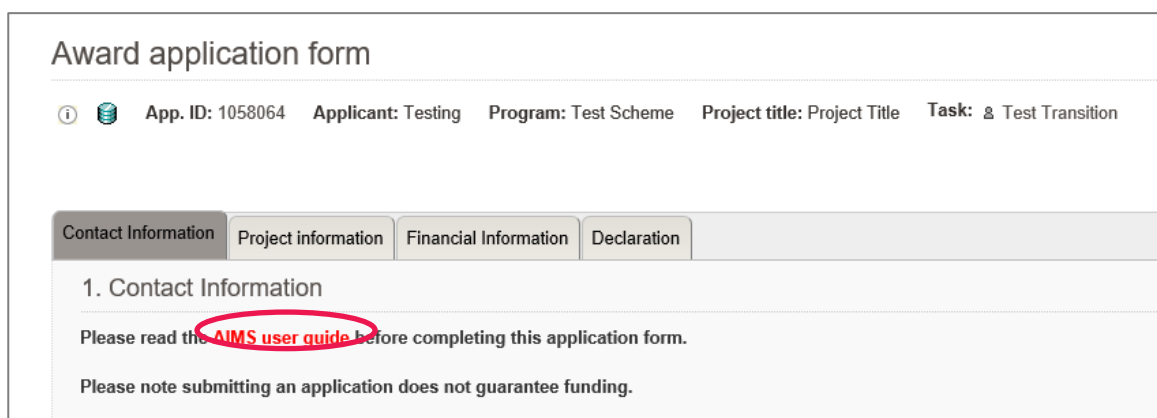
A: Navigating through the form

Once you have selected the programme you wish to apply for, you will then be directed to the form landing page, as shown below. You can click on any of the 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 contents page. If using Microsoft Word please remove any formatting by clicking on the  button.

You can draft your answers in the Microsoft Word document and then copy them across in unformatted text to the online form later if you choose. Please see section 3C for information on accessing your form at a later date.



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 each page. This is shown below.



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 form until you have entered all mandatory information.

Once all mandatory questions have been answered you will see a red tick on the tab, as shown below.

Alternatively, you can return to the contents page at any time by clicking on the 'Return to Index' link to review which sections of your form 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 light grey tab, as shown below. It will then turn a darker grey so you can clearly see which section you are working on.

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.

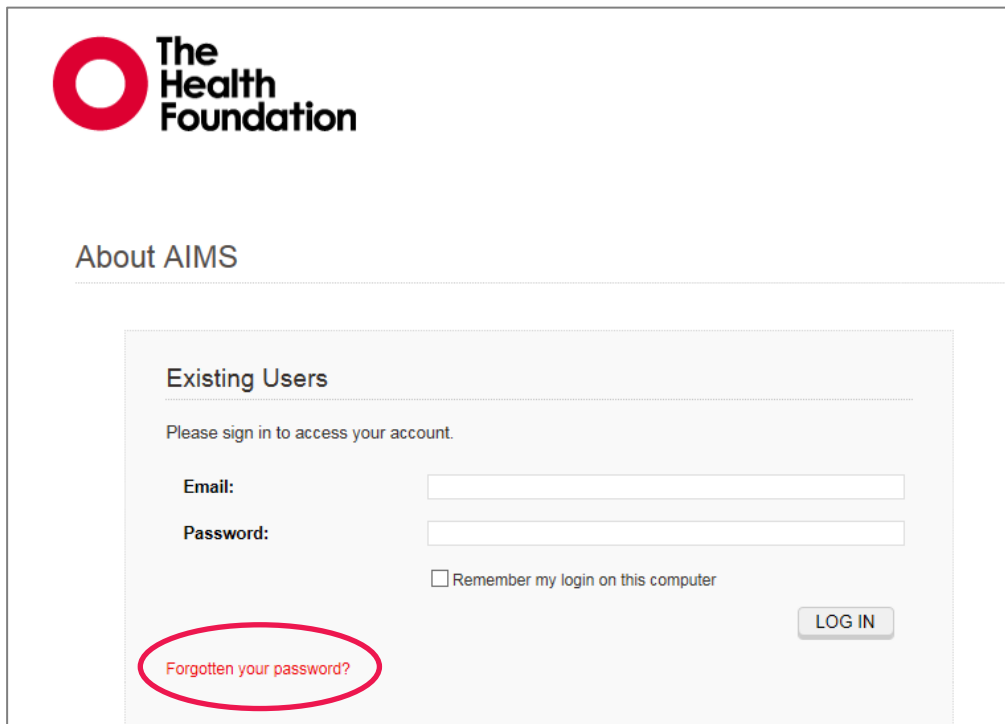
Save & Continue – This saves the section you are working on and moves you to the next section.

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 form and log out of AIMS. If you take this option you can log in to continue with your form at a later date by going to <https://AIMS.health.org.uk> and logging in as an existing user. Please see Section 3B for information on how to access your form at a later date.

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

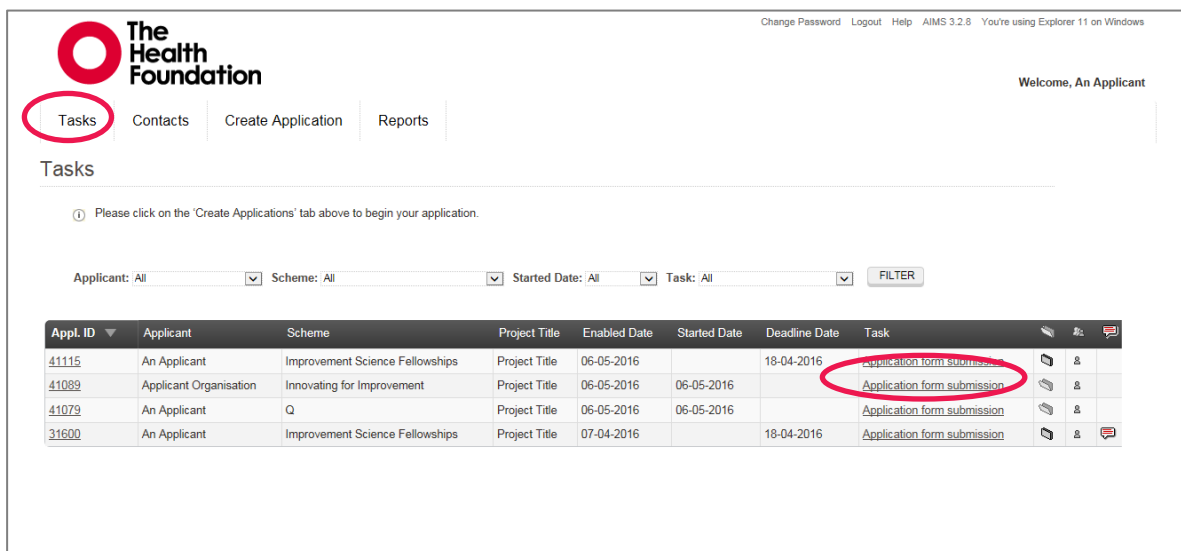
B: Returning to your form

To return to your form at any time, please log in to continue with your form at a later date by going to <https://AIMS.health.org.uk> and logging in as an existing user with the email address and password that you registered with. If you have forgotten your password, you can request to reset your password, as shown below.



Once you have logged in, you will be directed to the AIMS home page which displays all the tasks, or forms, currently in progress. To access the form, please click on the Task 'Application form submission' link in the Task column for the relevant form, as seen below.

You can return to this home page at any time by clicking on the 'Tasks' tab.



Appl. ID	Applicant	Scheme	Project Title	Enabled Date	Started Date	Deadline Date	Task
41115	An Applicant	Improvement Science Fellowships	Project Title	06-05-2016		18-04-2016	Application form submission
41089	Applicant Organisation	Innovating for Improvement	Project Title	06-05-2016	06-05-2016		Application form submission
41079	An Applicant	Q	Project Title	06-05-2016	06-05-2016		Application form submission
31600	An Applicant	Improvement Science Fellowships	Project Title	07-04-2016		18-04-2016	Application form submission

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.

4.2 How will the project be managed on a day-to-day basis? [\[Click for guidance\]](#)

(You may enter up to 2000 characters.)

2000 characters left

Project plan:
Allowed file types Excel, PDF, Ms Word

Email docx VIEW REMOVE

Select replacement file to upload: Browse...

Max File Upload Size (mb): 10 Allowed File Type(s): doc, docx, pdf, xls, xlsx

Please select 'Save' or 'Save & Continue' to ensure file(s) are attached correctly. This can be found at the bottom of the page.

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).

7.2 Set-up Phase

The Health Foundation funding

Activity	The Health Foundation funding	Total
Activity One	£ 1,500.00	£ 1,500.00
Total:	£ 1,500.00	£ 1,500.00

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 (this may sometimes be shown on both ends of the row). **If you do not do so after entering each row of information, the data will not be saved.** You will notice that a new row appears each time you save information. Please ignore this row as it will be automatically removed at a later stage.

1.7 Previous posts held, full or part time

ADD is a multi-function button. You should click on ADD to save the data entered in each row. You will be left with a blank row when you have completed this question in order for the last row to be saved.

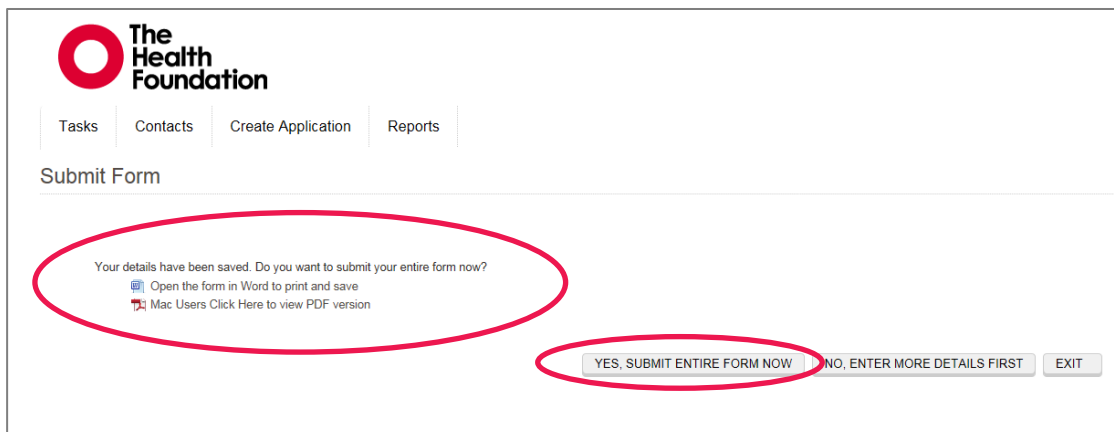
Year	Position	Institution / Organisation
1968	Position	
Year	Position	Institution / Organisation
Please select		

ADD

D: Submitting your form for assessment

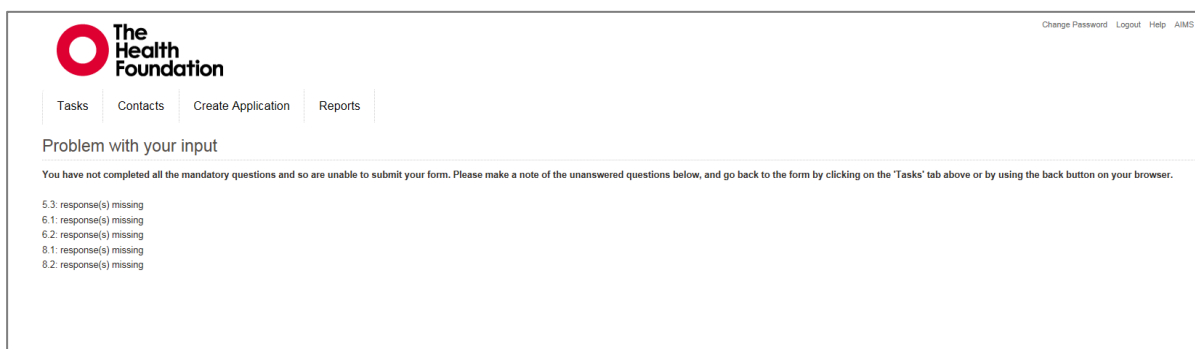
Once you have completed all the mandatory questions in all sections, you can submit your form. To submit your form, you can either select the 'Save & Exit' button, or go to the last section of the form and click on the 'Save & Continue' button, which will direct you to the submission screen, which can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

We highly recommend that you save a copy of your form 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 form, 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 form to complete these questions.



To go back to the 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 outstanding tasks. To return to the form, click on the underlined link in the 'Task' column, as shown overleaf.

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

The Health Foundation

Tasks Contacts Create Application Reports

Welcome, An Applicant

Tasks

Please click on the 'Create Applications' tab above to begin your application.

Applicant: All Scheme: All Started Date: All Task: All FILTER

Appl. ID	Applicant	Scheme	Project Title	Enabled Date	Started Date	Deadline Date	Task
41115	An Applicant	Improvement Science Fellowships	Project Title	06-05-2016		18-04-2016	Application form submission
41089	Applicant Organisation	Innovating for Improvement	Project Title	06-05-2016	06-05-2016		Application form submission
41079	An Applicant	Q	Project Title	06-05-2016	06-05-2016		Application form submission
31600	An Applicant	Improvement Science Fellowships	Project Title	07-04-2016		18-04-2016	Application form submission

Once you have successfully submitted your form, you will be directed 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 form after submission

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

The Health Foundation

Tasks Contacts Create Application Reports

Welcome, An Applicant

AIMS Reports - My Applications

My Applications

App. ID	Applicant Name	Scheme Name	Region Name	Project Title	Creation Date	Application Status	Relationship Type	Other Processes
41115	An Applicant	Improvement Science Fellowships	London	Project Title	06-05-2016 16:42	Application in progress	Main Contact	
41115	An Applicant	Improvement Science Fellowships	London	Project Title	06-05-2016 16:42	Application in progress	Applicant	
41089	Applicant Organisation	Innovating for Improvement	London	Project Title	06-05-2016 16:30	Application in progress	Main Contact	
41079	An Applicant	Q	London	Project Title	06-05-2016 16:18	Application in progress	Applicant	
31600	An Applicant	Improvement Science Fellowships	London	Project Title	07-04-2016 14:25	Application in progress	Applicant	
31600	An Applicant	Improvement Science Fellowships	London	Project Title	07-04-2016 14:25	Application in progress	Main Contact	
31299	Applicant Organisation	Efficiency Research Programme	London	tdtds	07-04-2016 11:05	Assessment in progress	Main Contact	

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

The Health Foundation

Tasks Contacts Create Application Reports

Welcome, An Applicant

AIMS Reports - My Applications

My Applications

App. ID	Applicant Name	Scheme Name	Region Name	Project Title	Creation Date	Application Status	Relationship Type	Other Processes
41115	An Applicant	Improvement Science Fellowships	London	Project Title	06-05-2016 16:42	Application in progress	Main Contact	
41115	An Applicant	Improvement Science Fellowships	London	Project Title	06-05-2016 16:42	Application in progress	Applicant	
41089	Applicant Organisation	Innovating for Improvement	London	Project Title	06-05-2016 16:30	Application in progress	Main Contact	
41079	An Applicant	Q	London	Project Title	06-05-2016 16:18	Application in progress	Applicant	
31600	An Applicant	Improvement Science Fellowships	London	Project Title	07-04-2016 14:25	Application in progress	Applicant	
31600	An Applicant	Improvement Science Fellowships	London	Project Title	07-04-2016 14:25	Application in progress	Main Contact	
31299	Applicant Organisation	Efficiency Research Programme	London	tdtds	07-04-2016 11:05	Assessment in progress	Main Contact	

Then open the document with the title 'Form Created: [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.

The Health Foundation

Change Password Logout Help AIMS 3.2.8 You're using Explorer 11 on Windows

Welcome, An Applicant

Tasks Contacts Create Application Reports

Application

App ID: 41115 Applicant: An Applicant Program: Improvement Science Fellowships Project title: Project Title Task: Application form submission

Summary Documents Financial Amounts

Recommended browser for opening files is Firefox. If you are using another type of browser, please open the document in Microsoft Word.

Document Type OK

File	Size	Date
Form Created: Application Form: Improvement Science Fellowships	0	06-05-2016 16:42

Please contact the programme team 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!