

CaixaResearch Consolidate
Call 2022

Grants "la Caixa"
Foundation
online system

Manual For Submission



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1*User registration*

"la Caixa" Foundation's Grants online system can be accessed through the link: <https://grants.lacaixafoundation.org/>

Users can register on the login page by clicking **REGISTER AS APPLICANT** (Project Leaders and Partners) or **REGISTER AS ORGANISATION MANAGER** (OM). A form to entering contact details will then appear in a new window. All profiles should register linked to an Organisation, which should appear in the list. Should the organisation not be found, it can be included by entering its name and identification details (NIF if the organisation is Spanish and VAT number for non-Spanish institutions). **This will be the organisation signing the Grant Agreement.**

It is essential that the applicant registers only one user profile in the system with his/her personal data (name, valid ID and email – institutional email recommended). It will not be possible to register more than one profile with the same ID. The email introduced by the PL and the OM will be used to send all important information on this Call.

After user registration you will receive an e-mail with an activation link to introduce the password into Grants "la Caixa".

If you experience technical problems, please contact Grants "la Caixa": ci_info@fundaciolacaixa.org.

2*Creating an application*

I Please note that CaixaResearch *Consolidate* **has two submission steps**. First, a **Letter of Intent** submission which will be evaluated remotely and a following **Full Proposal** submission for the pre-selected Letters of Intent. **You will have access to the Full Proposal and will be communicated about this new step of your application (if applicable) after the Letter of Intent pre-selection process.** In this guide, general information relevant for both, Letter of Intent and Full Proposal submission is provided.

To initiate a new application, Project Leaders (PLs) first need to identify the call they wish to apply for in the Open Calls table. It is necessary to check and/or complete your profile by accessing your **PERSONAL PROFILE** in the right upper button and clicking on Update Profile.

After choosing the suitable call by clicking the **GO TO CALL** button, initiate an application by clicking the **APPLY NOW** button. As PL, some eligibility conditions are required here in order to start an application, including being linked to a Host Non-profit Organisation based in Spain or Portugal, having an Asset at TRL level 4 or superior, having in place an intellectual property strategy and having only 1 open application in this call. Once you apply, your **pre-draft application** is then created and should provide some eligibility information. After this point, you will have access to the first tab: General Data and Information. Your application

will become a **draft version**, having access to the complete application form, once the initial section is completed and until you actively submit the application.

You can save and subsequently edit a draft version of the application until the deadline. Only one draft can be active in this call, which can be saved by clicking **SAVE DRAFT** and may be deleted at any time up to the deadline by clicking **WITHDRAW**. Please notice that withdrawn drafts cannot be recovered.

A **VALIDATION** button is available during the application process to check that the data provided is correct. We recommend using this validation throughout the process to ensure submission before the deadline for applications. An application is not submitted to “la Caixa” until an applicant has clicked **SUBMIT**.

Fields marked with a red star (*) are obligatory to fill in. Changes in the specific fields of **PROPOSAL INFORMATION** in this initial section will require the re-acceptance of the proposal.

The rest of the sections need to be completed but not necessarily in chronological order. To prevent loss of data, it is essential to press **SAVE DRAFT** before you leave Grants “la Caixa” or navigate in the system, as well as for visualizing some information introduced, including the budget table and the publications.

You can review the application at any time by clicking **OPEN** under **IN PROGRESS** on the Grants “la Caixa” front page. The whole application, including any currently entered data, can be downloaded as a PDF file by clicking on **APPLICATION SUMMARY**. Make sure that the PDF is readable appropriately before submitting your application. Once the submission is completed, your application will be found in **SUBMITTED** proposals.

3

Text and illustrations

FILLING IN THE FIELDS

For all applications, the individual fields must be completed in English and in accordance with these guidelines and the instructions supplied in Grants “la Caixa”.

APPLICATION TEXTS

Text from e.g. Word can be copied and pasted into most text fields of the application. It is, however, important to check that formatting, special letters and symbols, have not been converted or lost in the text fields after copying and pasting. Every text box has a countdown of characters (with spaces).

4*Consortium Partners and Co-owners of the Asset/s*

! Please note that **this section only applies to Full Proposals**, as the Letter of Intent does not include information about partnerships and/or co-ownerships.

In Consortium proposals and when the Asset/s is co-owned by other Partners, Partners must be invited by the PL to join the project. All the invitations shall be managed through the **INVITATIONS** tab on the upper left corner, by adding the information on the name, email and role of the invited partners.

“la Caixa” advises you to invite all members of this proposal at once (accounting these contacts will need to approve their participation in the proposal), as changes to this table (removal of members) will require the re-approval of all other members in the proposal.

When cancelling an already accepted invitation, please make sure to navigate to **PROJECT PARTICIPATION ACCEPTANCE STATUS** table in the **PROJECT TEAM** tab and discard the corresponding form.

Each Partner receiving the invitation shall register if they are accessing the system for the first time and validate the proposal. It is necessary to complete their profile by accessing your Personal Profile in the right upper button.

5*Submitting the application*

The application in its entirety must be submitted electronically via the application system by clicking submit before the indicated deadline. It is not possible to submit an application or any part of it by standard mail or e-mail. Any material submitted outside the application system will not be included in the evaluation and will not be returned. Applications cannot be modified after the submission deadline.

An application cannot be submitted unless all the required fields have been completed. Fields in the application that are incorrectly completed or incomplete will be listed in a grey box at the top of the application when submitting or validating the proposal. Clicking on each individual line takes you directly to the incomplete field. The grey box will disappear when you select **SAVE DRAFT**. This allows you to continue with the application and submission.

Amending incorrect entries can be time-consuming, so we recommend validating applications well before the deadline. Please remember to check that the PDF version of the proposal is legible and contains all entered information before submitting.

Once the application has been submitted, you will receive a confirmation of receipt by e-mail. If you do not receive a confirmation of receipt (please check your spam folder), you should contact “la Caixa” as soon as possible.

If you wish to withdraw a submitted application after the deadline, please contact Grants “la Caixa”: ci_info@fundaciolacaixa.org.

6*Evaluation process of the proposals*

After the Letter of Intent assessment, the “la Caixa” Foundation will contact the Project Leader in order to inform him/her about the result of the remote pre-selection process.

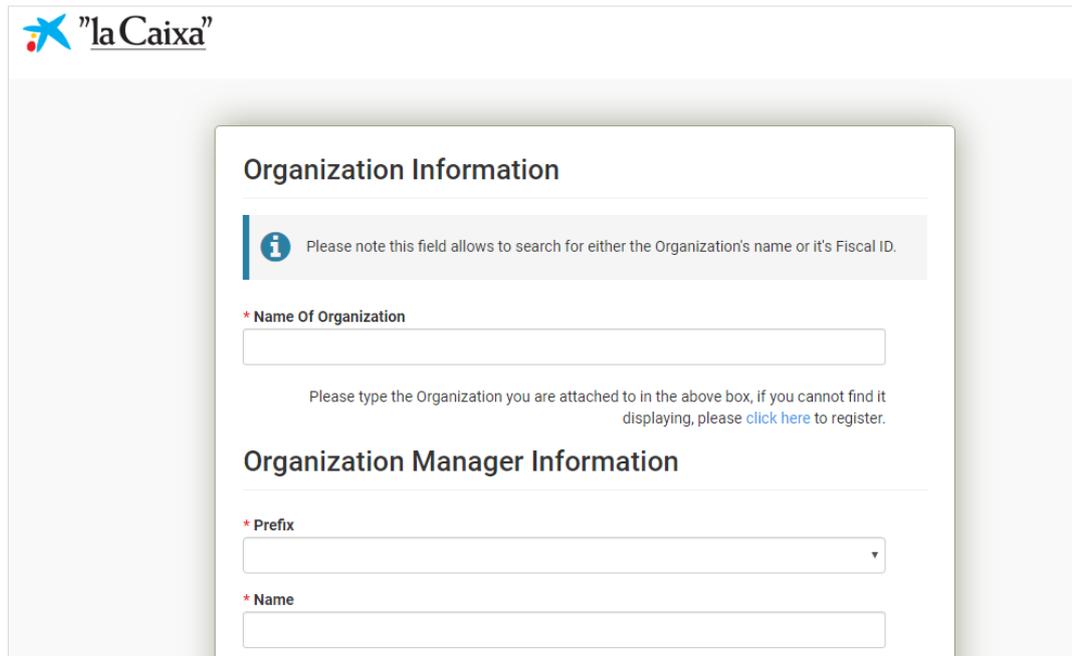
If pre-selected, the Project Leader will have access to a Full Proposal application form in order to present the project for selection.

In addition to the Full Proposal form and additional documents, LCF may carry out a thorough assessment of the Project by an independent external consultant in order to evaluate specific aspects of the proposal (as intellectual property strategy, regulatory roadmap strategy, etc...), as well as the planned financial and development milestones.

Material or substantial deviations will render the Full Proposal ineligible. In all other cases, LCF reserves the right to exclude a Project from the selection process if the information provided in the Full Proposal shows discrepancy with respect to the information provided in the Letter of Intent.

7*Visual support***7.1. ORGANISATION MANAGER (OM)****7.1.1. Registration**

Register as an [ORGANISATION MANAGER](#) and link to your organisation. If the organisation is not in the list, register it with name, country and tax ID.



"la Caixa"

Organization Information

i Please note this field allows to search for either the Organization's name or it's Fiscal ID.

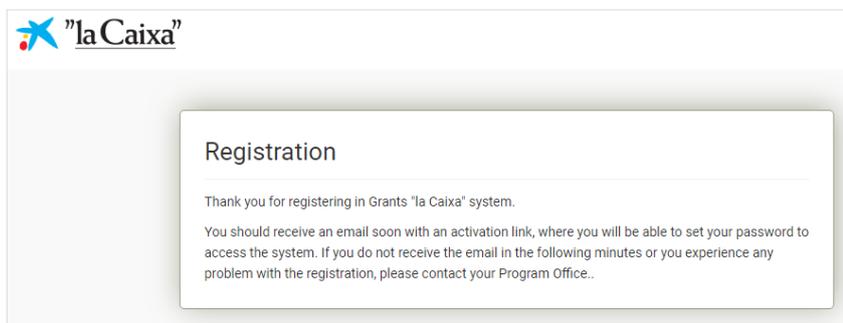
*** Name Of Organization**

Please type the Organization you are attached to in the above box, if you cannot find it displaying, please [click here](#) to register.

Organization Manager Information

*** Prefix**

*** Name**



"la Caixa"

Registration

Thank you for registering in Grants "la Caixa" system.

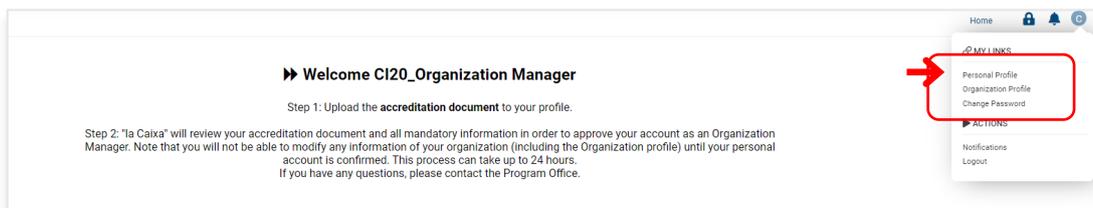
You should receive an email soon with an activation link, where you will be able to set your password to access the system. If you do not receive the email in the following minutes or you experience any problem with the registration, please contact your Program Office..

7.1.2. Activation

Check your email to click on the activation link and define your password.

7.1.3. Personal profile

Complete personal profile and add the accreditation document in your personal profile by clicking on the circle in the upper right corner that contains your initial.



» Welcome CI20_Organization Manager

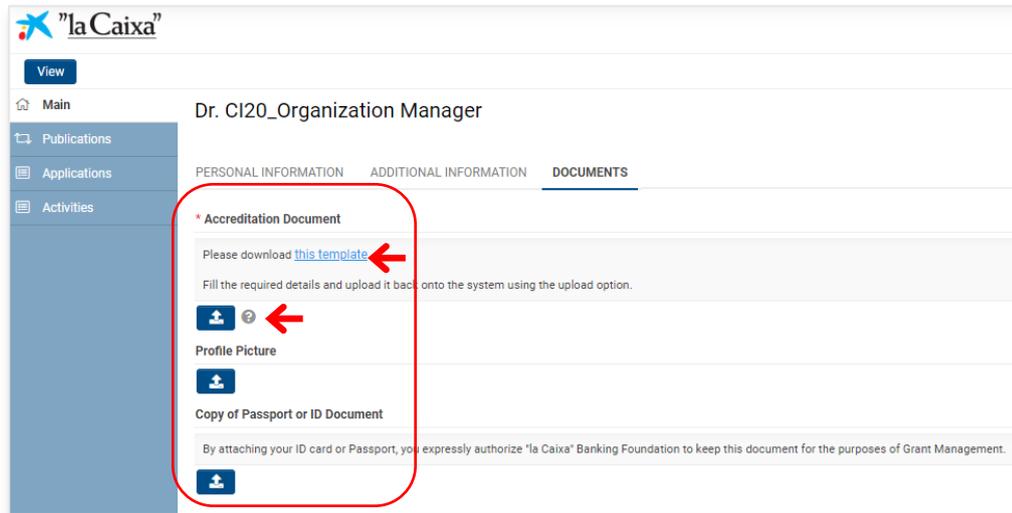
Step 1: Upload the **accreditation document** to your profile.

Step 2: "la Caixa" will review your accreditation document and all mandatory information in order to approve your account as an Organization Manager. Note that you will not be able to modify any information of your organization (including the Organization profile) until your personal account is confirmed. This process can take up to 24 hours.
If you have any questions, please contact the Program Office.

- Home
- MY LINKS
 - Personal Profile
 - Organization Profile
 - Change Password
- ACTIONS
 - Notifications
 - Logout

7.1.4. Documentation

In the [DOCUMENTS SECTION](#), download and complete the template for the accreditation document. Add the required documentation in the same pdf and upload it to the system.

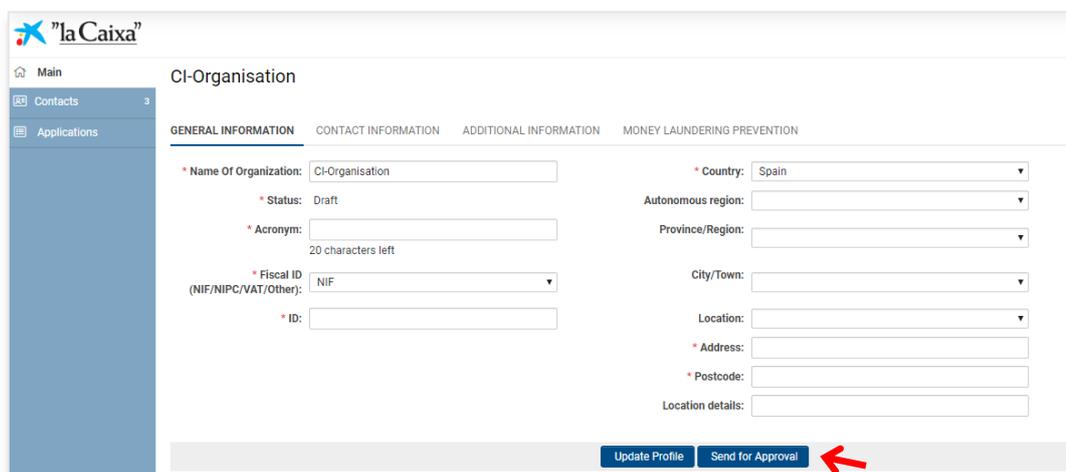
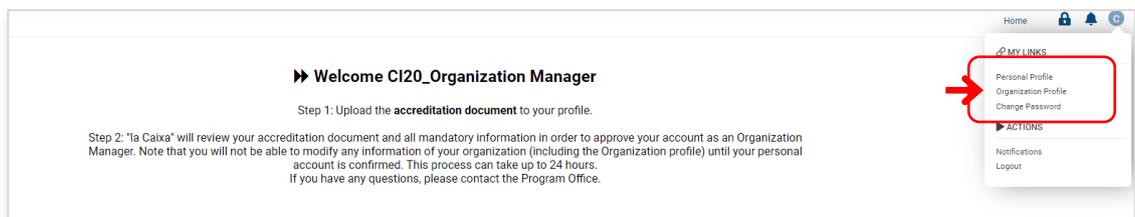


7.1.5. "la Caixa" validation

Once the profile is updated with the information and the required document, please wait for the CaixaResearch *Consolidate* Programme Office to validate your information.

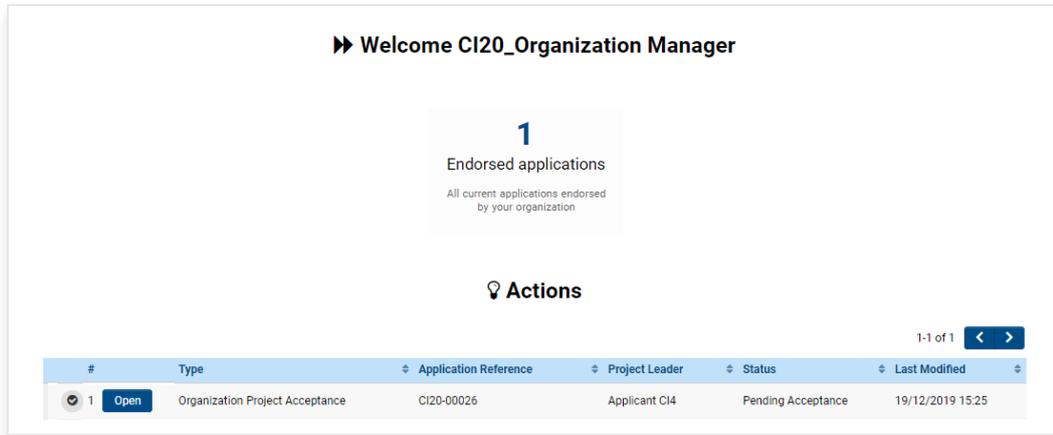
7.1.6. Organisation profile

If your organisation is not active, complete the information in the Organisation profile. The CaixaResearch *Consolidate* Programme Office will also validate the Organisation information.



7.1.7. Actions

Once your data has been validated, you can now access the initial screen with the endorsed applications (applications validated by the OM) and actions to complete (applications to validate by the OM).



» Welcome CI20_Organization Manager

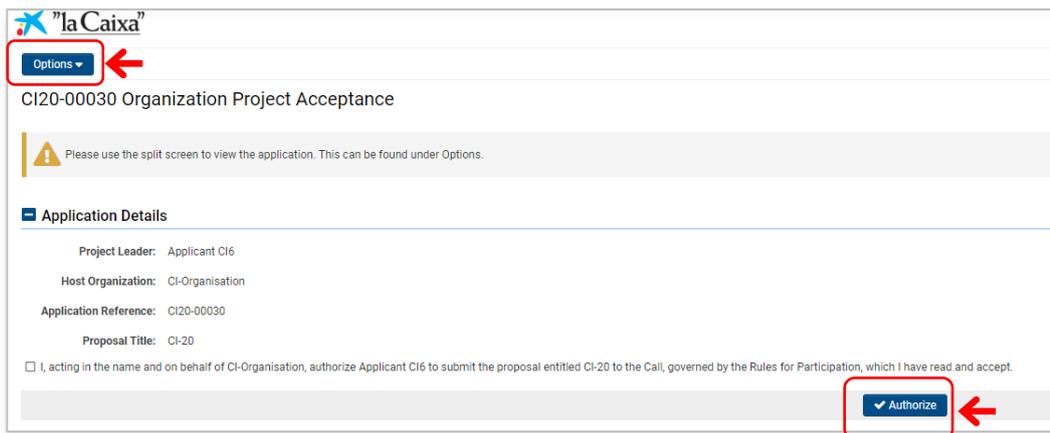
1
Endorsed applications
All current applications endorsed by your organization

Actions

#	Type	Application Reference	Project Leader	Status	Last Modified
1	Organization Project Acceptance	CI20-00026	Applicant C14	Pending Acceptance	19/12/2019 15:25

7.1.8. Endorsing a proposal

To endorse a proposal, click on **OPEN** and **AUTHORISE** the proposal. You can visualise the proposal (General data and proposal information – Project team - Budget) by clicking on **OPTIONS** – Applications to split view.



la Caixa

Options

CI20-00030 Organization Project Acceptance

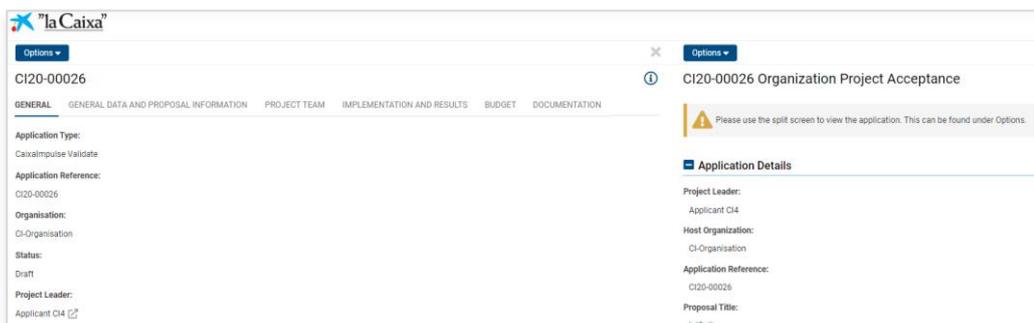
Please use the split screen to view the application. This can be found under Options.

Application Details

Project Leader: Applicant C16
Host Organization: CI-Organisation
Application Reference: CI20-00030
Proposal Title: CI-20

I, acting in the name and on behalf of CI-Organisation, authorize Applicant C16 to submit the proposal entitled CI-20 to the Call, governed by the Rules for Participation, which I have read and accept.

Authorize



la Caixa

Options

CI20-00026

Options

CI20-00026 Organization Project Acceptance

Please use the split screen to view the application. This can be found under Options.

Application Details

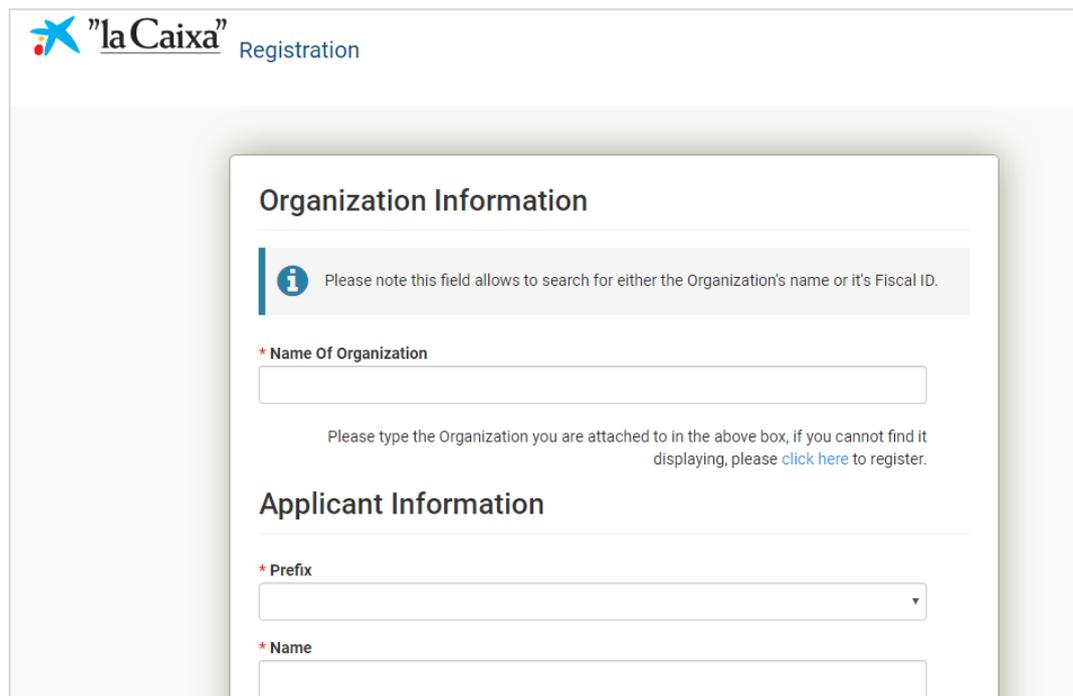
Project Leader: Applicant C14
Host Organization: CI-Organisation
Application Reference: CI20-00026
Proposal Title: CI-20

! The endorsement of a proposal by the OM is **mandatory before submitting** a proposal, and **is required both at the Letter of Intent and Full Proposal stages**. Please make sure this validation is completed on time.

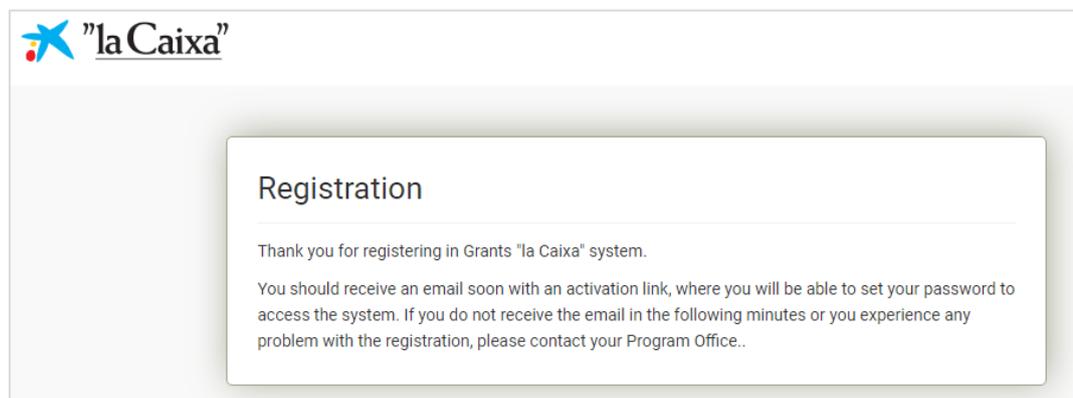
7.2. PROJECT LEADER (PL)

7.2.1. Registration

Register as an **APPLICANT** and link to your organisation. If the organisation is not in the list, register it with name, country and tax ID number.



The screenshot shows the registration interface for the Grants "la Caixa" system. At the top left is the "la Caixa" logo and the word "Registration". The main content area is titled "Organization Information" and contains an information icon with the text: "Please note this field allows to search for either the Organization's name or it's Fiscal ID." Below this is a required field for "Name Of Organization" with a text input box. A note below the box says: "Please type the Organization you are attached to in the above box, if you cannot find it displaying, please [click here](#) to register." The section is followed by "Applicant Information" with a required dropdown for "Prefix" and a required text input for "Name".



The screenshot shows the confirmation page after registration. It features the "la Caixa" logo at the top left and a section titled "Registration". The text on the page reads: "Thank you for registering in Grants 'la Caixa' system. You should receive an email soon with an activation link, where you will be able to set your password to access the system. If you do not receive the email in the following minutes or you experience any problem with the registration, please contact your Program Office.."

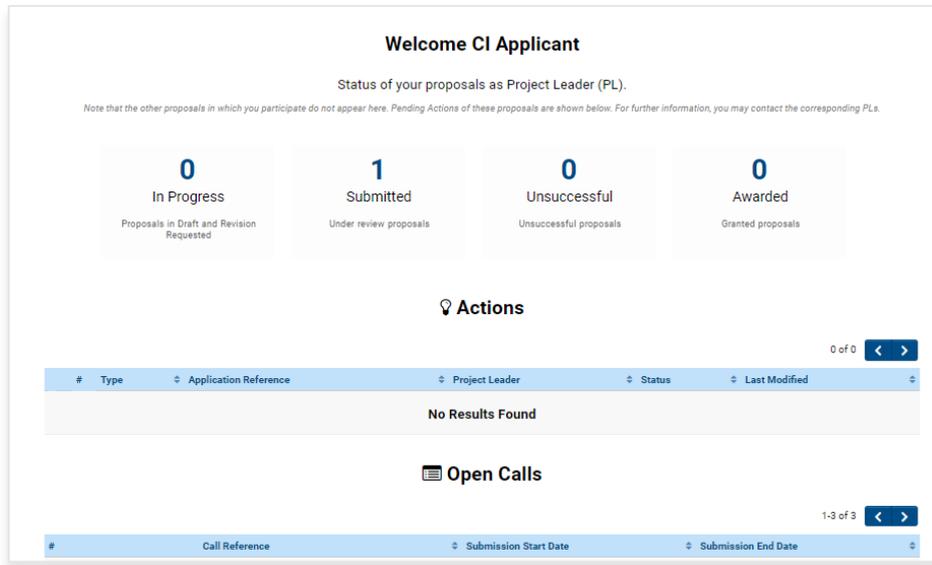
7.2.2. Activation

Check your email to click on the activation link and define your password.

7.2.3. Initial screen

In the initial screen, you can update your personal profile and visualise:

- » Proposals as PL: [IN PROGRESS](#), [SUBMITTED](#), [UNSUCCESSFUL](#) and [AWARDED](#).
- » [ACTIONS](#) for proposals you are invited as Partner.
- » [OPEN CALLS](#) where you can visualise all the open calls.

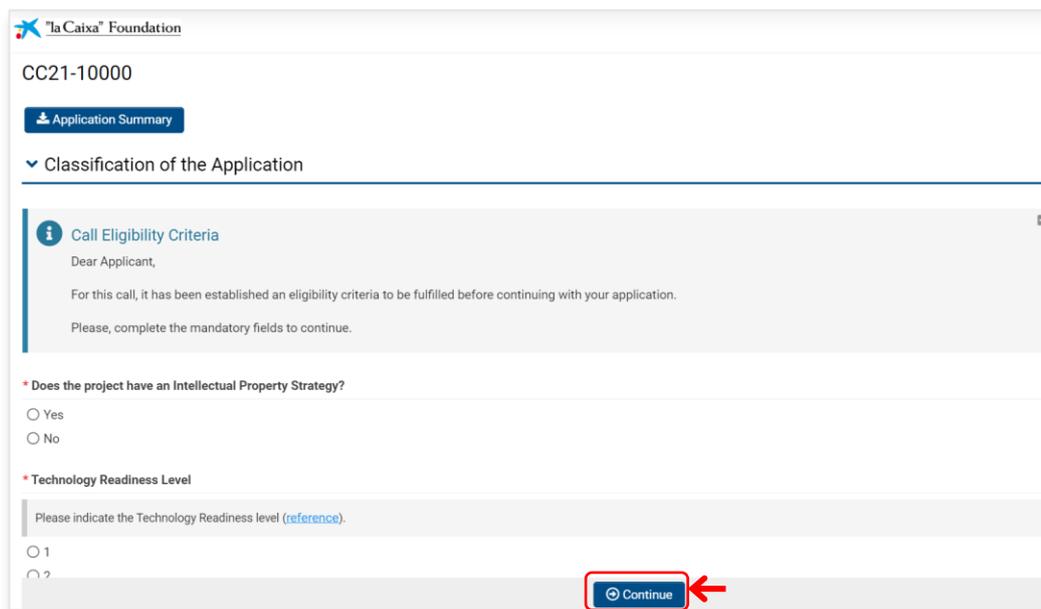


7.2.4. Start a proposal

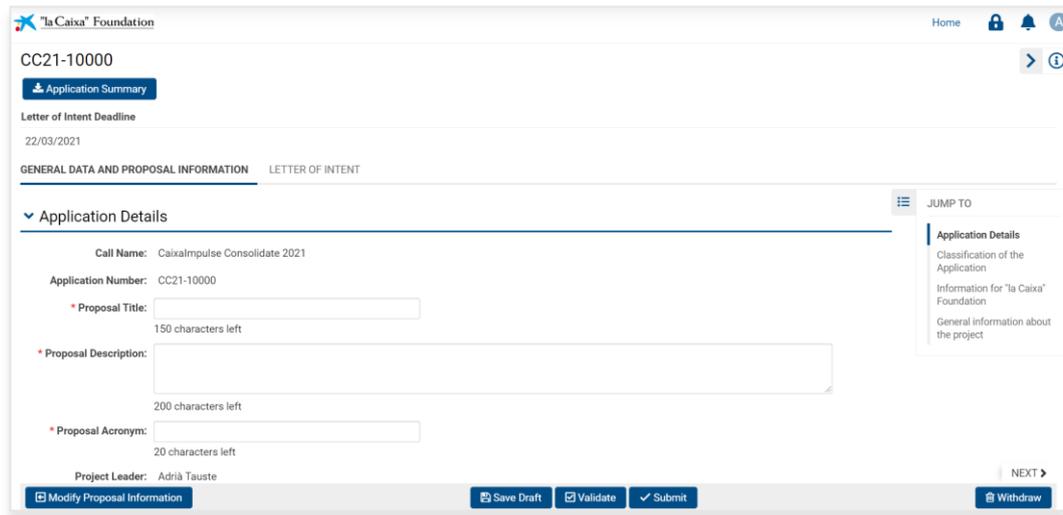
To start an application as PL, click on [GO TO CALL](#) and check the eligibility criteria before clicking on [APPLY](#).

7.2.5. General data and proposal information

Complete the information on [CLASSIFICATION OF THE APPLICATION](#) tab in order to visualise the rest of the proposal.



Once clicking on **CONTINUE**, you will visualise the rest of the proposal as a draft.



The screenshot shows a web interface for the 'la Caixa' Foundation. The main heading is 'CC21-10000' with an 'Application Summary' button. Below this is the 'Letter of Intent Deadline' set to '22/03/2021'. The navigation tabs are 'GENERAL DATA AND PROPOSAL INFORMATION' (selected) and 'LETTER OF INTENT'. The 'Application Details' section is expanded, showing:

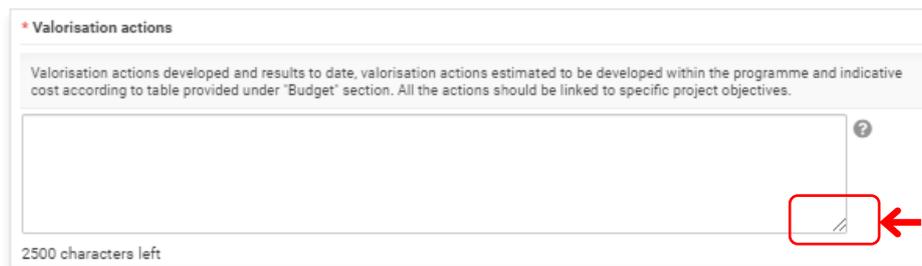
- Call Name: CaixaImpulse Consolidate 2021
- Application Number: CC21-10000
- Proposal Title: (text input, 150 characters left)
- Proposal Description: (text area, 200 characters left)
- Proposal Acronym: (text input, 20 characters left)
- Project Leader: Adrià Tauste

 At the bottom, there are buttons for 'Modify Proposal Information', 'Save Draft', 'Validate', 'Submit', and 'Withdraw'. A 'JUMP TO' sidebar on the right lists 'Application Details'.

At any time, make sure to save the changes in the proposal by clicking the **SAVE DRAFT** button. You can **VALIDATE** the information to visualise the missing information in order to **SUBMIT**. **WITHDRAWN** proposals cannot be retrieved.

7.2.6. Text boxes

Text can be completed in every section taking into account the limitation of **characters with spaces**. You can change the visualisation size of any box through the right bottom corner.

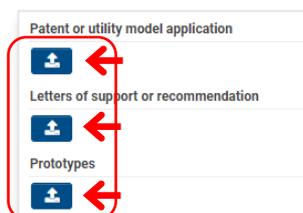


The screenshot shows a text input field titled '* Valorisation actions'. The text inside reads: 'Valorisation actions developed and results to date, valorisation actions estimated to be developed within the programme and indicative cost according to table provided under "Budget" section. All the actions should be linked to specific project objectives.' Below the text is a red box with a diagonal line and a red arrow pointing to it, indicating the handle for resizing the text box. The character count '2500 characters left' is shown at the bottom left.

7.2.7. Documentation

Documentation can be uploaded as pdf files.

! Please note that **this section only applies to Full Proposals**.



The screenshot shows a section titled 'Patent or utility model application'. It contains three rows, each with an upload icon (a blue square with a white arrow) and a red arrow pointing to it:

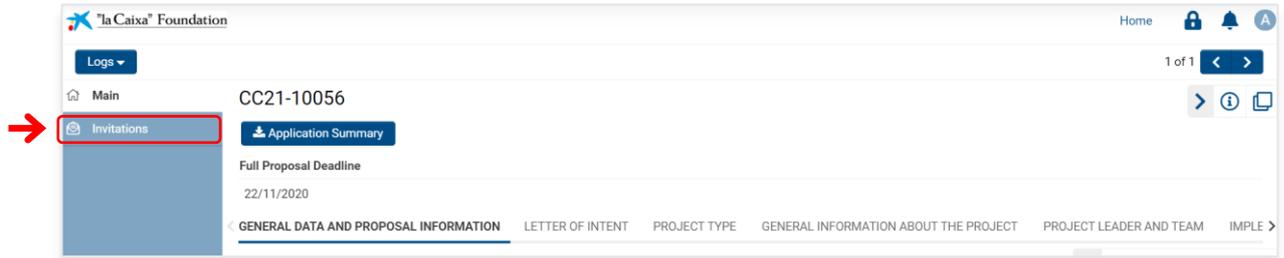
- Letters of support or recommendation
- Prototypes

 The entire section is enclosed in a red rounded rectangle.

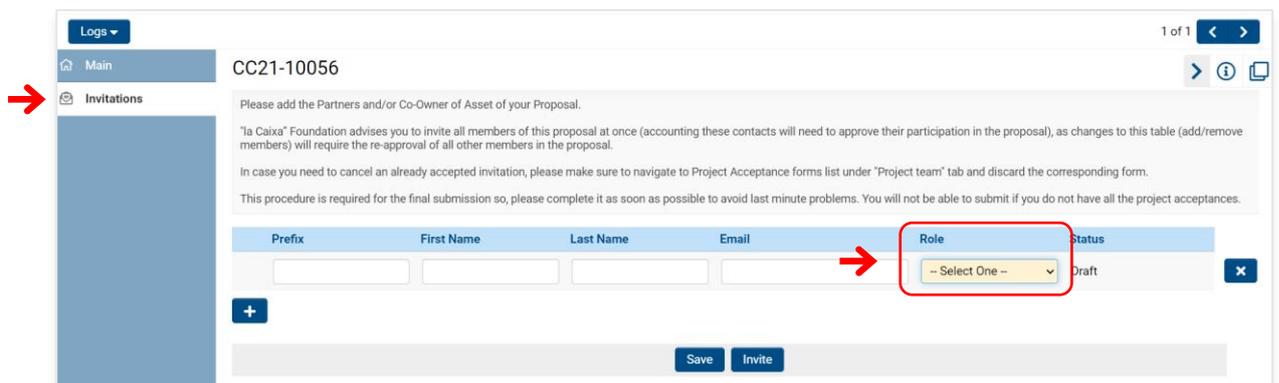
7.2.8. Invitation of Consortium Partners and Co-owner of Asset/s (COA)

! Please note that this section only applies to Full Proposals.

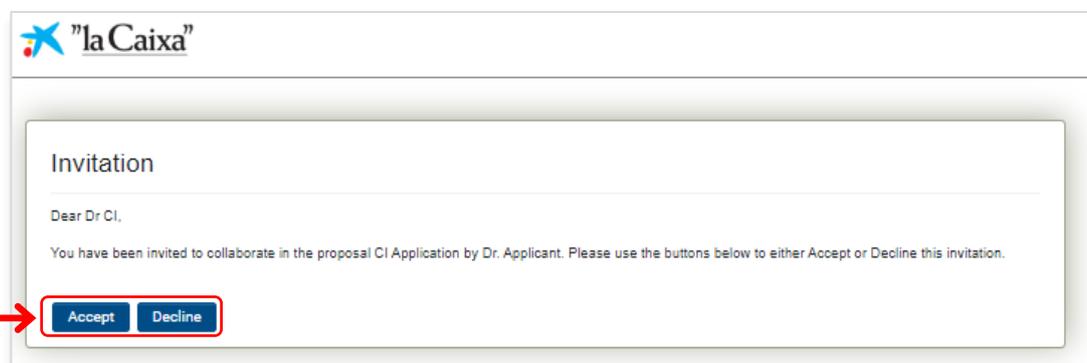
» a) Click on the INVITATIONS section on the left side of the proposal.



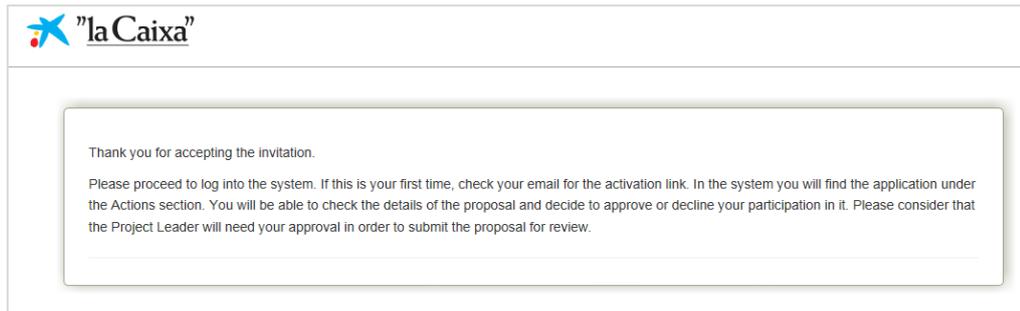
» b) Click on + to invite the participants adding their name, email and role in the proposal.



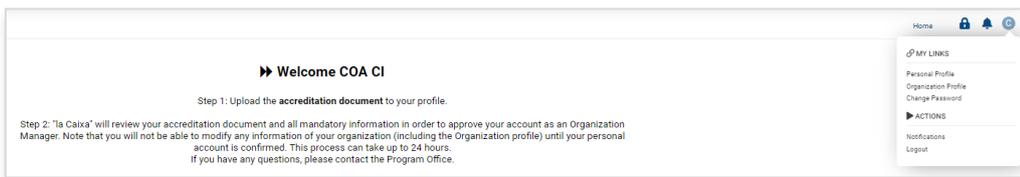
» c) The participants will receive an invitation by email that they can accept or decline.



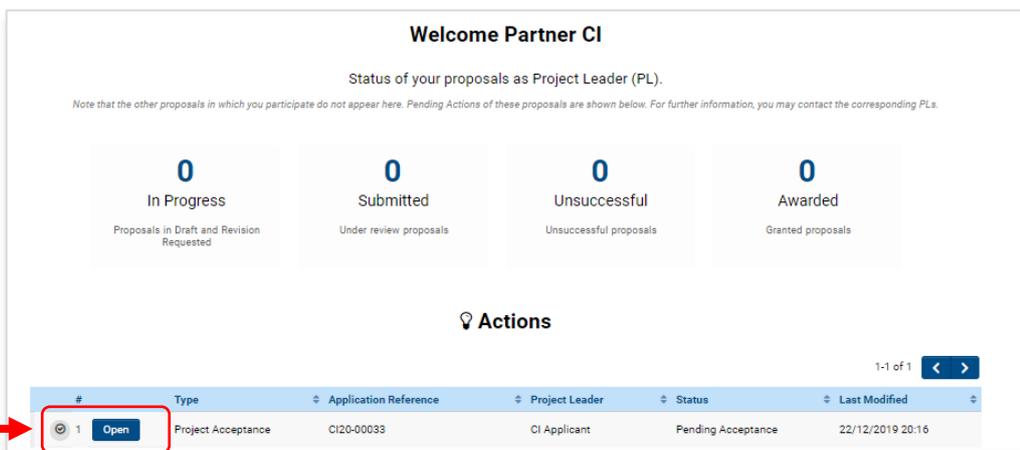
» d) If they accept the invitation, they will be directed to the registration site or they can access the system if they are already registered.



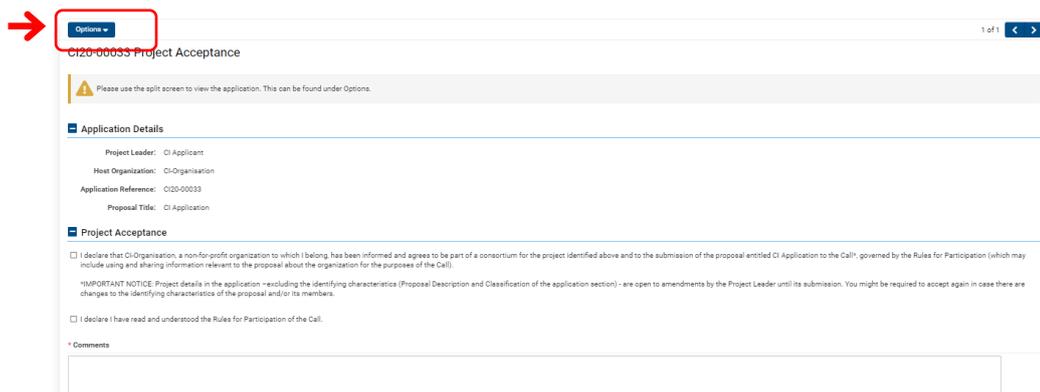
- » e) COAs will be considered OM of their Institutions. They will be asked to follow the procedure described in 7.1.

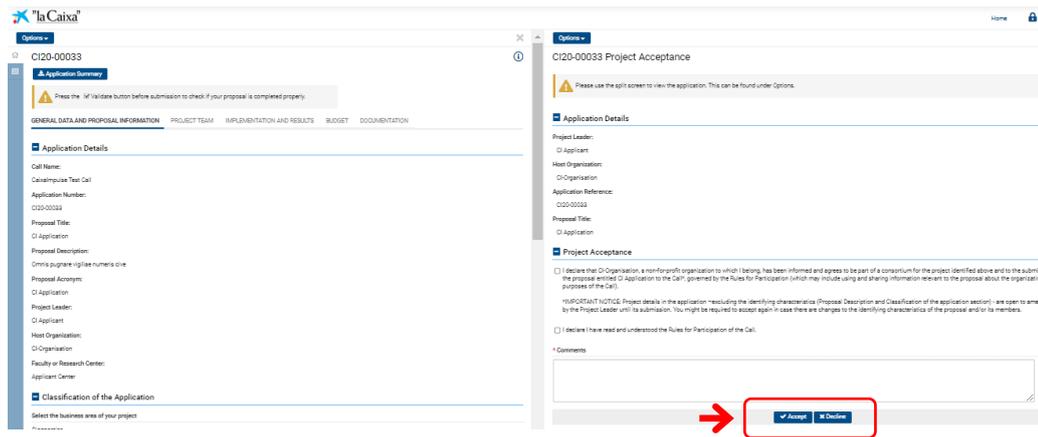


- » f) Consortium Partners will visualise the proposals they have been invited to in their main page, under the ACTIONS section:



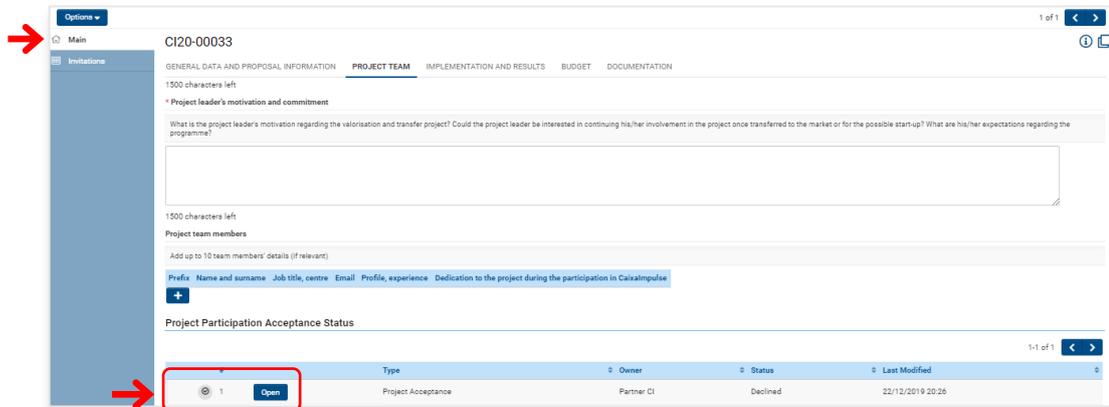
- f.1) Click on the OPEN button to visualise the proposal in OPTIONS – Application. As participants, they will visualise the entire proposal without the possibility of editing.



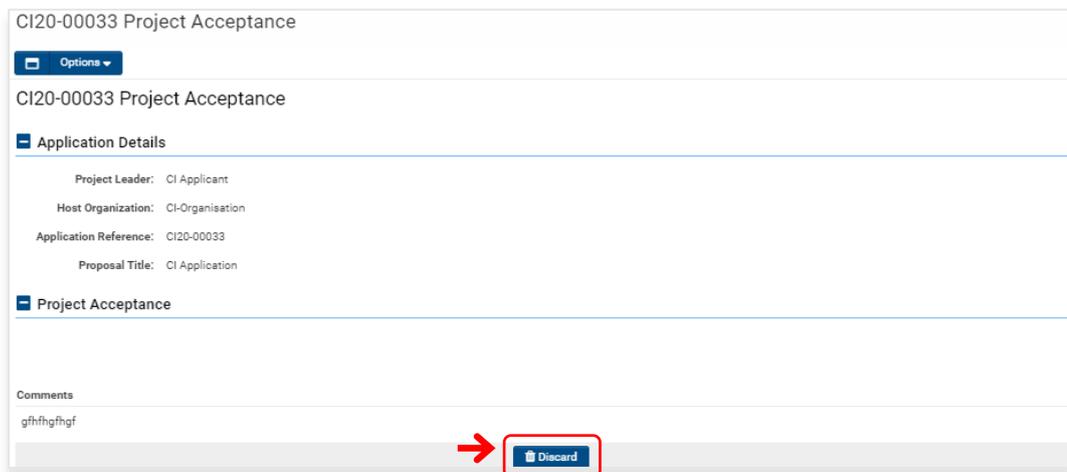


» h) If any participant declines their participation, PLs must delete them from two different sites:

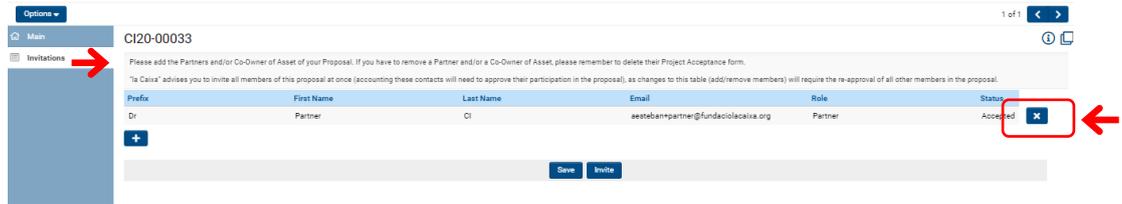
h.1) Table of project participation acceptance status in the **PROJECT TEAM** section.



Click **DISCARD** to delete their participation in the proposal



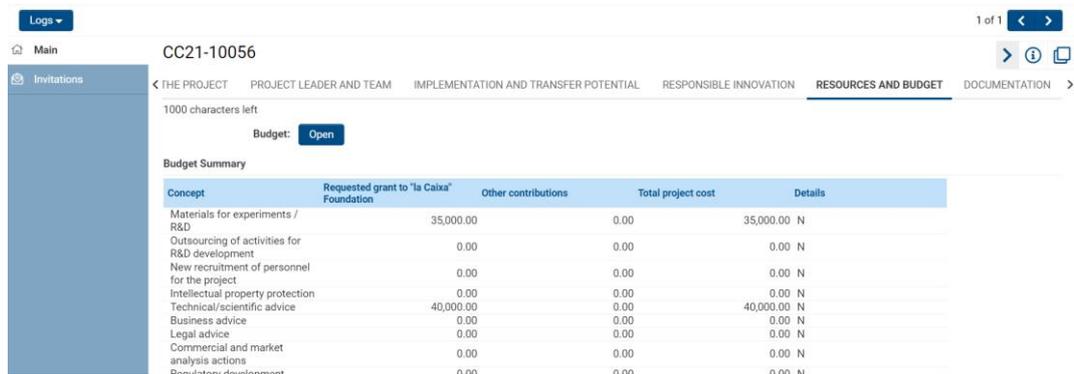
h.2) Invitations section. Click on the X to delete the invitation



In this section, Consortium partners and COAs that have not accepted the participation or that have been removed by the PL will remain in the list as **DISCARDED**.

7.2.9. Budget

To complete the **BUDGET**, open the table and complete the information. Comments are required in all Details boxes in order to save the changes.



7.2.10. Validation and submission

Before submitting, please **VALIDATE** the proposal and check any information or action missing.

! Please finalise the **submission on time**, as it will not be possible to submit any proposal after closing the application period.