Contents:

1. User Definitions ........................................................................................................................................... 2
2. User Registration ........................................................................................................................................... 2
   2.1. Registration as an applicant .................................................................................................................. 3
   2.2. Registration as an Organization Manager .......................................................................................... 5
3. Activation of an account as an applicant or as an organization manager ....................................................... 5
4. Completion of the Organization Manager Registry .......................................................................................... 6
   4.1. Personal Information Section ................................................................................................................. 6
   4.2. Additional Information Section .............................................................................................................. 6
   4.3. Documents Section .................................................................................................................................. 7
   4.4. “la Caixa” Foundation’s validation of the Register of the Organization Manager ................................... 9
5. Organization Profile ........................................................................................................................................... 9
   5.1. General Information Section .................................................................................................................. 9
   5.2. Additional Information Section ............................................................................................................ 10
   5.3. “la Caixa” Foundation’s validation of the Organization Profile ............................................................ 10
6. Creating a Proposal for the flash call .............................................................................................................. 11
7. Completing your proposal .............................................................................................................................. 11
   7.1. General data and proposal information ............................................................................................... 11
8. Proposal information ....................................................................................................................................... 12
   Bibliography .................................................................................................................................................. 12
9. Features of the survey .................................................................................................................................... 13
   9.1. Proposal Buttons (second part) ............................................................................................................. 13
10. Endorse a Proposal ....................................................................................................................................... 14
11. Submission of the Proposal .......................................................................................................................... 16
1. User Definitions

**Project Leader (PL):** Principal Researcher, of any nationality, of a Host Organization (HO) based in Spain or Portugal. The PL is the person responsible for the presentation of the Proposal to the Call and for the coordination of the overall executions of the Project.

**Organization Manager (OM):** The Organizational Manager is a person, appointed by the Host Organization, responsible for the management, and the acceptation, of the proposals submitted by the organization/entity. The Organizational Manager is a SINGLE person per organization/entity that is authorized, through the accreditation document by, the Legal Representative of the organization/entity.

**Host Organization:** non-profit Research Performing Organization, based in Spain or Portugal that acts as a Coordinating Organization of the Projects.

2. User Registration

To present a proposal, first, you must create an account on the Grants "la Caixa" Website.


There are two types of users, namely, (1) **Applicant** (Project Leaders - PL) and (2) **Organization manager** (OM). Check the Useful Definitions Section to see the role of these users.
2.1. Registration as an applicant

If you are a Project Leader you must register as an applicant.

a) Click on Are you an applicant?

b) Click on the accept button to agree to the Terms and Conditions applicable to the registration and use of "la Caixa" Grants Management online system.

c) Fill in the information of all the fields required in application form.
"If your organization is not in the list, you will have to register it. To do so, click on **click here** under the field Name of Organization.

By doing so you will be redirected to the application form that includes a section about the organization.

d) Once you fill in all the required information, click the **submit** button. The following message will then appear.

Registration
Thank you for registering into grants in Caixa system.
You should receive an email 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 Officer.
2.2. Registration as an organization manager

a) Click on Are you an organization manager?

b) Follow steps b to d of section 2.1 Registration as an applicant.

3. Activation of an account as an applicant or as an organization manager

a) After you finished your registration, you will receive an activation link, to the email that you have indicated during the registration. To create a password to access the application, click on activation link on the email.

Dear Dr. [Name],

We are pleased to inform you that your request to register as an applicant has been accepted. Please activate your account by clicking on the activation link below.

[Activation Link]

When using this link, you will be asked to set your password. If you have any question, please refer to our privacy and terms. Welcome to Grants la Caixa.

b) By clicking on the activation link you will redirected to a page where you will be able to create a password for your account. Introduce a password (8 characters and a minimum of 1 Upper Case, 1 Lower Case, 1 Digit and 1 Symbol) and click on the submit button.
c) Lastly, after creating the password for your account, you will receive an email.

Dear

This is a notification that the password associated with this email on Grants la Caixa ([link]), has been changed. If you made this change, you can disregard this notification.

If you did not change your password, please contact your System Administrator. You can also update your password at any time using the Forgot password link on the login page.

Sincerely,

4. Completion of the Organization Manager Registry

4.1. Personal information section

a) Access your account and complete the information required in the Personal information section in the Personal Profile.

4.2. Additional information section

a) Despite the fact that only mandatory field in this section is the gender, and this will automatically be already filled through the application form, we encourage you to also fill the phone number field. Filling this field will prove very useful, especially, when the closing date of the call is near.
4.3. Documents section

a) Download the **accreditation document template**.

b) Fill in the **accreditation document template**.

c) Click on the **upload** icon.
d) Click on the open folder icon and upload PDF file.

e) Upload the accreditation document; Please upload, in a SINGLE PDF, 
- the accreditation document template, signed by the Legal Representative of 
  the organization and the appointed Organization Manager, 
  and, the Legal Powers, that state that the Legal Representative of the Host 
  Organization is entitled to sing on behalf of the Organization.

f) Click on the X icon.

![File Upload]

![Copy of Passport or ID Document]

 Please note: You could also add the IDs to the PDF of the accreditation document.

h) Click on update profile.
4.4. "la Caixa" Foundation’s validation of the registration of the organization manager

Once you complete your registry the first step in the home page of your account will disappear.

By clicking on update profile, all the information of your registry will be sent to the Technical Secretary of the Call. The Technical Secretary will check the information and will ask you to correct your registry, if anything is wrong, or will approve your registry without asking any corrections. This process may take up to 24 hours.

5. Organization Profile

Once your registry has been accepted by the Technical Secretary of the Call, you will receive an email, and, you will be able to fill in the information required in the Organization’s Profile.

5.1. General information section

a) Access your account and complete the information required in the General Information Section in the Organization Profile.

Please note: You only have to do this step if your organization is not active in the system.
5.2. Additional information section

a) Fill in the required information.

b) Click on update profile.

5.3. "la Caixa" Foundation's validation of the organization profile

By clicking on update profile all the information of your organization will be send to the Technical Secretary of the Call. The Technical Secretary will check the information and will ask you to correct the information, if anything is wrong, or will approve your organization without asking any corrections.
6. Creating a Proposal for the flash call

To start a Proposal, you must login as an applicant using the credentials (user and password) that you created. Introduce your credentials at http://grants.lacaixafoundation.org/.

a) Once you have accessed your account, click on open call in the Home Page.

7. Completing your proposal

7.1. General data and proposal information

a) Fill in all the mandatory fields in the General data and proposal information tab with the required, and correct, information.
b) Once you have completed all the information you will see three buttons at the bottom of the page.

Save draft is used to save the information you have filled in so far.

Continue to move forward in the proposal after all the first part is completed, giving you access to the second part of the proposal.

Withdraw to discard the proposal you are working on. This step is not reversible.

8. Proposal information

Once you have clicked the continue button, you will see the Proposal information tab.

If needed, you can change the size of the box by dragging on the righthand bottom corner.

BIBLIOGRAPHY

IMPORTANT NOTE:
This list must not include references of work written by the research team. You must not include references in the other sections of the proposal. Proposals that do not fulfill these criteria will not be eligible.

a) To enter the details of the bibliography, click on OPEN.
b) Complete all the required information and click the + button to add another reference.

![Bibliography](image)

- You must include a minimum of 2 and a maximum of 5 references. This list must not include references of work written by the research team. You must not include references in the other sections of the proposal. Proposals that do not fulfill this criteria will not be eligible.

<table>
<thead>
<tr>
<th>DOI</th>
<th>Title</th>
<th>Authors</th>
<th>Journal</th>
<th>Date of Publication</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

+ button

- Once you have completed all the required information, click on the SAVE button.

9. Features of the survey

The following section only applies to flash calls based on survey data

9.1. Proposal buttons (second part)

Once you have completed all the information on the offer you will see three buttons at the bottom of the page.

**Save draft** is used to save the information you have filled in so far.

**Validate** is to check that all the information of the proposal is complete and correct before submitting. *We recommend using this button as you go along.*

**Submit** to submit your proposal once it is complete (see point 11)

**Modify proposal information.** This button will take you back to the first part and make any changes you think necessary.

**Withdraw** - You can at any time discard the proposal you are working on and start a new one.
10. Endorse a Proposal

The endorsement of the proposal is essential to submit the proposal. This step must be done by the Organization Manager of the Host Organization. Please make sure this validation is completed on time.

a) The Organization Manager must login. On their homepage, the proposals that the organization manager must endorse will appear under the actions section.

b) To endorse a proposal, the organization manager must click on the open button.

c) Click on actions/options -> application in split view to visualize the complete proposal, and, click on authorize to accept/endorse the proposal.
d) Click on **yes** in the warning that will appear.

![Alert](image)

**Alert**

Are you sure you want to confirm this project?  
YES NO

---

**IMPORTANT**: The acceptance of the proposal by the Organization Manager is **NOT** the submission of the proposal. The PL must access their account and click on the **SUBMIT** button. If the PL doesn’t do this before the call deadline, the proposal won’t be submitted and will automatically be withdrawn.

---
11. Submission of the Proposal

Once you have completed all the information of the proposal, and your Organization Manager has endorsed your Proposal, you will be able to submit it.

a) Click on the submit button.

b) Click on the yes button on the alert that will pop up.

We recommended submitting your proposal in advance to avoid any last-minute issues.

We will not accept any proposals after the deadline has passed.

If you need further assistance, please contact us:
Spain: observatori@fundaciolacaixa.org
Portugal: observatoriosocial@fundacaolacaixa.org

IMPORTANT: Once you submit your proposal, no further changes will be possible.