Residency/Core Competency Innovation Help Guide

OMeGA Medical Grants Association
(8/1/12)

NOTE – The new system has two distinct steps: The first, LOI, is submitted and then approved by OMeGA prior to starting step two, the application. The application must be submitted by Wednesday, September 12, 2012, 5pm CDT.

One application per residency program
Orthopaedic residency programs may apply for one Core Competency Innovation grant up to $20,000.00. This grant cycle is meant to encourage innovative thinking in teaching the six ACGME core competencies as they apply to orthopaedic surgery graduate medical education.

The six core competencies as defined by the ACGME:
- Patient care/surgical assessment methodology
- Medical knowledge
- Practice-based learning and improvement
- Interpersonal and communication skills
- Professionalism
- Systems-based practice

Applications with a broader benefit to the residency program are given special consideration. Grants are awarded based on objective criteria, including:
- How requested funds improve the teaching of ACGME core competencies in your program
- Background, goals, intervention and outcome demonstrating a thoughtful project
- Program’s criteria to evaluate or measure success of the project
- Merits of the educational program
- Faculty expertise
- Accreditation status
- Diversity
**OMeGA’s residency Grant LifeCycle Manager (GLM)**

(If attempting to access the GLM and you’re unable to use the link above, type the following into your browser: https://www.grantinterface.com/Common/LogOn.aspx?urlkey=omegamedicalgrants)

Earlier this year OMeGA moved to a new web-based grant management process. Whether you have applied in the past or this is your first time applying for a grant with us, please invest time to read through the entire help guide. There is valuable information about OMeGA’s entire grant process as well as the new online application. You will notice there is also a tutorial video.

**General hints**

**Start early**
If other people are providing information to you for the application, give them deadlines that allow you time to put it all together. If your grants office is an integral part of this process, ensure there is enough time for them to review and approve the application by OMeGA’s deadline.

**One person at one time**
Multiple people working on the same application at the same time may cause system errors and the information may not save correctly.

**Judicious uploading**
Do not upload brochures, PowerPoint presentations or other pieces that were created for another use.

**Answer the question asked**
First and foremost, provide the information requested. Be concise: there are character limits in most text fields and an error message will appear if the character limit is exceeded. The application cannot be submitted until the error is corrected.

**Inputting information**
You may find it easiest to prepare all information in a separate document, then cut and paste into the boxes once all your information is together.

**Contact person**
This should be the user information used for the registration process. If this person will be away for an extended period during the application and review period, go into your profile and change the contact information so we can easily contact your program with any questions that may arise.

**2012-2013 academic year schedule**
Application period opens – Wednesday, August 1, 2012
Application period closes – Wednesday, September 12, 2012, 5pm CDT
Residency/Core Competency Innovation recipients notified – Monday, October 8, 2012
75% of funds distributed to grant recipients – Wednesday, October 31, 2012 (once signed GRA has been returned)

Public announcement of grant recipients – Friday, November 2, 2012 (after all signed GRAs have been returned)

Poster presentations at the AOA Annual Meeting in Denver, CO – June 11-15, 2013
25% of funds distributed to grant recipients – following poster presentation and all report submissions – August 1, 2013

Qualified applicants
All orthopaedic programs in the Americas may apply for an OMeGA grant. Applications, attachments and subsequent reports must be submitted in English. Accredited or non-accredited programs may apply.

Residents cannot apply for a grant directly
They may assist their programs to accumulate data needed for the grant application.

Apply for all possible grants
We encourage your program to apply for all available grants since there are no guarantees that your program will be awarded a grant from any one organization. However, you may not “double dip”: your program must decline the OMeGA grant if your costs are covered by other sources including another grant.

Question mark icons
While filling out the online application, there are question mark icons on the right side of the questions that provide helpful information or character limits. Place the cursor over the question mark icons (2) for a description of that field. You’ll see there are also many questions that include text areas or text boxes that have restrictions on how many characters can be inputted.

Paying the application fee
There is a $25 fee for each application that must be paid before you can start your application.
NEW: Each application fee must be paid for separately in order to receive a 10-character alphanumeric receipt order number which is needed for each application. This order number can be used only once, is unique to the application and will be used throughout the process.

While the AOA Store will accept payment for more than one application at a time, you will be given only one receipt order number with each transaction. This order number can be used only once. Be sure to save this number because it will be used to access your application and to identify your grant throughout the grant process. Allow 1 business day for the application fee to be processed and your application to become available.
If the program or program director has an AOA ID and password

1. Click here to be directed to the AOA Online Store. (If attempting to access the store and you're unable to use the link above, type the following into your browser: http://www.aoassn.org/store/omega-grant-application-fees/omega-grant-application-fee.aspx)
2. Log on and enter the AOA ID and password.
3. Confirm e-mail is correct.
4. Make sure you are still on the OMeGA Grant Application Fee tab on the top right.
5. Click on “Add to Cart” in the bottom right corner.
6. Choose only “1” in quantity and click on “Checkout” in the bottom right corner.
7. Enter the credit card information. MasterCard and Visa are accepted. American Express is not accepted.
8. Proceed to payment.

If the program or program director does not have an AOA ID and password

1. E-mail info@omegamedicalgrants.org with
   a. Program director’s name
   b. Title
   c. Institution
   d. Address
   e. Phone and fax
   f. E-mail address

The AOA ID and password will be e-mailed to you within 2 business days.

2. Click here to be directed to the AOA Online Store. (If attempting to access the store and you're unable to use the link above, type the following into your browser: http://www.aoassn.org/store/omega-grant-application-fees/omega-grant-application-fee.aspx)
3. Log on and enter the AOA ID and password.
4. Confirm e-mail is correct.
5. Make sure you are still on the OMeGA Grant Application Fee tab on the top right.
6. Click on “Add to Cart” in the bottom right corner.
7. Choose only “1” in quantity and click on “Checkout” in the bottom right corner.
8. Enter the credit card information. MasterCard and Visa are accepted. American Express is not accepted.
9. Proceed to payment.

Your Residency/Core Competency Innovation application payment will be applied to your registration within 1 business day. You will not be able to apply until your payment is reflected. An application fee receipt will be sent to the e-mail address associated with your AOA ID. The receipt contains a 10-character alpha-numeric receipt order number. Click here to see where to find this number in the e-mail. Make sure to save the order number because it will be used to access your application.
Residency/Core Competency Innovation application process

The following section lists most LOI and Application questions as you will see them. Suggestions are provided to help you complete the application concisely.

LOI

Order number – This is the 10-character alpha-numeric order number found on your paid application fee receipt.

Accreditation – Association with accredited residency program.

Alternate contact – Include first and last name, title, e-mail address and phone of the person to be contacted if the primary person cannot be reached.

Tax status – Choose the tax status of your program.

Tax status form(s) – Upload your tax status form(s) as a pdf.

Checks payable to – This should be the organization name that was submitted on the W-9/W8BEN tax form. Be sure to verify this is the correct “Pay to the order of” information since the form cannot be changed once it has been approved by OMeGA.

Payment address – Where the check is to be sent, including the name of the person to whose attention it should be sent.

Application

Organization

Amount requested – Enter the amount requested (do not to exceed $20,000).

Core Competency addressed – Choose which ACGME core competency your project addresses from the list provided. It is possible to list more than one.

Use of funds – List the specific educational items the awarded funds will purchase/support and why your program is deserving of a grant. (5000 character limit)

Program information

Purpose of this grant – How will requested funds improve the teaching of ACGME core competencies in your program. (5000 character limit)

Project description – Concisely describe your proposal including background, project goals, intervention, and outcome. (5000 character limit)

Program director CV – Paste a concise CV using the provided form. (10000 character limit)
Degree of program director – Choose your program director’s degree.

Resources and facilities – Briefly describe the resources and facilities associated with the requested grant. (1000 character limit)

Orthopaedic faculty and sub-specialty breakdown – How many FTE faculty are involved in your residency program? Include the breakdown by sub-specialty. (1000 character limit)

Number of residents – How many residents are in your program?

Gender diversity – How many of your current residents are women?

Racial diversity – How many of your current residents are under-represented minorities?

Evaluation - Highlight the criteria you will use to evaluate or measure the success of the project that would be supported by the grant. Are there any outcome measurements? (1000 character limit)

Additional comments

Budget overview

Project budget – What is the total amount needed for your project? Do not include the cost of a possible presenter traveling to the AOA Annual Meeting.

Other support – Are you or will you apply for other grants to support this project? If so, from whom and what is the amount?

Detailed budget – Give a detailed description of how the requested budget is going to be used including all dollar amounts. (1000 character limit)

Overview of Online Application Process

The following is designed to provide grant applicants with instructions for use of the Grant Lifecycle Manager (GLM) application. Remember while this document attempts to provide step-by-step instructions, we realize that not all user scenarios may be adequately covered. If you remain on a page with inactivity for longer than 40 minutes, you will be logged off for security reasons. Please save every 15-25 minutes.

You can also watch a 5 minute tutorial video by clicking here. We encourage you to watch this helpful tutorial.

Registration Page

If you already have an account with residency Grant Lifecycle Manager;

1. Enter your login, which is your e-mail address, in the login field.
2. Enter the Password that you chose when you set up your account.
3. Press the “Log On” button to enter the Grant Lifecycle Manager.
If you have forgotten your password;
4. Click on the “Forgot your Password?” link, enter your User ID, which is your e-mail address, and the system will e-mail your password to your e-mail account.

If you do not have an existing account;
5. Click on Create New Account to register.

---

**To register an account**

1. Click on “Create New Account”.
2. Enter your personal contact information.
3. Enter your organization’s contact information.
4. Click on the “Proceed to Next Step” button.

(See diagram on next page)
**Entering a Password**

1. After you have registered your account, you will be taken to a “Set Password Page” where you will enter your password.
   
   a. Click “Save” after entering the password.

2. If you wish to change your password, log on to your account and click on “Edit Contact”. This will allow you to change your information.

**Applicant Status Page**

After you have registered your account you will be directed to the Application Status Page.

1. **Apply** – This allows you to review the available grants and apply.

2. **Dashboard** – This is your homepage where you can check on the status of your grants. This page will display the form you just filled out, what its status is, and what the next form will be.

3. **Fax to File** – Instead of scanning a document you can fax it to your computer. Using Fax to File helps shrink documents to a smaller file size. [Click here](#) for more information about Fax to File.

Application Status Page
Choosing a Grant Program

After clicking on Apply you will see a link to the grant application. Listed in the help guide and on OMeGA’s website is a brief description of the grant and who qualifies for the grant. Read the description thoroughly before applying.

1. If you have already paid the $25 application fee and received the 10-character alpha-numeric receipt order number, click on the grant program to start filling out the first form.
   a. OMeGA does not use an Access Code, so please disregard this text box.

2. The application has multiple forms. Each form must be filled out and submitted for approval before you will have access to the next form. After it is deemed complete, OMeGA will approve you to move on to the next form.
Completing the LOI
After agreeing to the applicant instructions you will be sent to the first form in the grant program. Enter all the applicable information then Save as “Draft” or “Submit” the form to OMeGA.

1. Before starting the first form, Letter of Inquiry (LOI), you will need to have received a receipt order number that can be found on your paid application fee receipt e-mail. This is a unique 10-character alpha-numeric order number and is used to access your application. Click here to see where to find this number on your application fee receipt. If you have not yet paid your application fee click here to go directly to the AOA Online Store and pay the fee.

2. Answer the questions on the form, paying close attention to the instructions and character limitations for each question.
   a. Text questions have a character limit which only allows you to type or paste a certain amount of text for your answer. File upload questions have size limitations indicated in Mega Bytes (MB). The file size you are uploading must be less than the amount of MBs allowed on the question.

3. Applicants can save forms as a draft and come back to the form after any given time to complete it. OMeGA will not review applications until the form is submitted.
   a. You will receive a confirmation e-mail after the submitted application has been received by OMeGA. The word “Complete” will be grayed-out if your submission has been received. If the form has not been received, “Complete” will appear in blue.

4. When the LOI is complete, submit the form. OMeGA will review and either approve or return for corrections. The LOI will be reviewed within 2 business days. You will be given access to the application if the LOI is approved. Complete the application and upload all required attachments, and then submit. If the LOI is returned for corrections, complete as necessary and re-submit. You will not be given access to the application until the LOI is reviewed and approved. Applicants can save forms as a draft and come back to the form after any given time to complete. OMeGA will not check for completeness until the form is submitted.
   a. There will be a confirmation page stating the form has been submitted after forms have been received. Refer to your Application Status Page to see what stage each form is in.

(See diagram on next page)
Convert the form to a PDF file for printing.

Resize the text area by dragging the corner.

Character Limit

Save the form and keep working

Submit the form to the Foundation. Once submitted no changes can be made.
**Accessing Forms After “Save” and “Submit”**

You can check on the status of your application on the Application Status Page and access it for historical record keeping. The Application Status Page is your homepage. You will be automatically directed there when you login.

1. You can only view the application grant and print it once it has been submitted. No changes can be made.
2. You can Edit the saved form from the Application Status Page if the form has been saved as a Draft.
3. You may find it helpful to save a pdf of all print packets to your computer hard drive for future reference.

**Application Status Page**

![Application Status Page](image)

**Supporting documents**

Click on the links to make sure the tax form you have submitted earlier in registration is the most current and correct.

Certifying **W-9, W-BEN, 501(c)(3)**, or any other tax forms.

**Uploaded documents should be in Word or Excel format. Do not convert to pdf.**

- [Program Director CV](#)
- [Faculty Director CV](#)
After you have submitted your application
Your grant will be reviewed for completion by OMeGA. We will request additional information via e-mail from you if your application is incomplete. Programs have 5 business days to provide the necessary information before the grant request is closed. You will have 2 business days to return your information when the application deadline gets closer or if OMeGA contacts you after the deadline date. (This will be noted in the e-mail that is sent.)

Once all information is completed, the Review Committee will review your application and recommend or deny the grant request.

Grants – after the decision
All OMeGA grant recipients must sign the Grant Recipient Agreement (GRA) issued by OMeGA Medical Grants Association. Click here to review the GRA. There will be no changes to the Grant Recipient Agreement: please ensure that you and your grants office can agree to this document before submitting. If you have any questions on the agreement terms, please contact OMeGA at info@omegamedicalgrants.org.

Governing law issue
Governing Law. This Grant Agreement shall be governed by the law of the State of Illinois without regard to conflict of law rules and venue for resolution of dispute will reside with the state and federal courts located in Cook County, Illinois.
A few programs have asked if OMeGA will alter our policy on governing law (shown above), either changing to the laws of another state or country or remaining silent. While OMeGA does not anticipate any issues, this section ensures that OMeGA would consistently use one law for all problems regardless of the institution location with which the problem arose—nor need to travel to any location throughout the Americas to which OMeGA provides grants.

Poster and presentation
Recipient programs must create a poster of their project to be displayed at the Council of Residency Directors (CORD) meeting at the annual American Orthopaedic Association meeting held in Denver, CO, June 11-15, 2013.
The poster size is four feet by four feet with a heading that lists the title, authors, and affiliation. Lettering should be large enough to be read at least a few feet from the board. Please include “Supported by a Core Competency Innovation grant from OMeGA Medical Grants Association” at the bottom of the poster in a legible type size and font.

Please come prepared to speak about your project and have additional text, figures, and charts handy if needed. No additional AV (Power Point, etc.) is required or allowed. Your poster serves as your “visual aid.” Pushpins will be provided. Set-up, display and teardown hours will be announced one month prior to the meeting.
An electronic pdf copy of the poster must be e-mailed to OMeGA by June 11, 2013. Posters will be posted on the OMeGA website after the AOA Annual Meeting.

Two to three programs will also be asked to give 4-minute PowerPoint presentations and prepare a one page Word document outline of their presentation. Programs must share their presentations with OMeGA two weeks in advance of the meeting so it can be included in the CORD meeting handouts. Presentations should focus on best practices that can be used by other programs rather than be a summary of the project. The number of slides should be limited to 6 and the 4-minute time period will be strictly enforced. The presentation outline will also be posted on the OMeGA website after the AOA Annual Meeting.

**Required reports**
A brief status update must be submitted by March 23, 2013. At the conclusion of the funded activity, recipients must also submit a final report detailing use of funds and other information to verify the grant award was used as intended. You will receive an e-mail reminder approximately 4 weeks prior to report due dates. If you do not submit a final report, you may not submit additional grant requests until your final report is completed. The final report includes the online report, use of funds summary worksheet and inclusion of copy of receipts for all expended funds. Final reports are due after the funded request is complete or by July 31, 2013.

If you have any questions, please e-mail: info@omegamedicalgrants.org.

Thank you,
OMeGA Medical Grants Association