



Fellowship

2022-2023 Grant application Help guide

(9/7/21)

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View the [Help guide FAQs](#)

If you need any additional assistance, please email: info@omegamedicalgrants.org.



Getting started

Most LOI (Letter of inquiry) and application questions can be seen later in this help guide. Suggestions are provided to help you complete the application concisely. After you register in the online [Fellowship Grant Lifecycle Manager \(GLM\)](#), follow these distinct steps:

1. Application fee

A \$35 fee must be paid before starting the application process. Each application fee must be paid separately to receive a unique 5-character order number for each application. The 5-character order number is found on the [receipt](#) sent to the email address associated with the AOA ID used to pay the application fee. This order number is unique to the application, can be used only once, and will be used throughout the process. If a grant is awarded, the order number will be used as the Grant ID. Click on [AOA Store](#) to pay the application fee. Programs are strongly encouraged to pay the application fee before October 31, 2021.

*NOTE: The AOA store username/password is different from the OMeGA GLM username/password used to access your LOI (Letter of inquiry)/Application. Contact info@omegamedicalgrants.org if you are unsure of your AOA username/password or do not have an AOA account. *You do not need to be an AOA member to apply for an OMeGA grant, but you do need to have an AOA account.**

2. LOI (Letter of inquiry)

After the application fee has been paid and you have the 5-character order number, log into the fellowship GLM. To access and complete the LOI, click on the word "Apply" on the GLM dashboard and then scroll down the page to select the subspecialty in which you would like to apply for a grant. The LOI must be submitted, reviewed and approved by OMeGA prior to having access to the application. Allow 3-4 business days for OMeGA's review of the LOI. If additional information is requested, complete as necessary and resubmit within three business days, knowing you cannot start the application until the LOI is approved. You will be notified by email when the LOI has been approved and you can proceed to the application. The application is not visible until the LOI has been approved.

Repeat the process if you are completing an application in more than one subspecialty. Each 5-character order number can be used for only one LOI/application. Each US institution may apply once in each subspecialty. OMeGA is not awarding grants to Canadian programs for the 2021-2022 academic year.

3. Application

The application must be submitted by Tuesday, November 16, 2021, 5pm CST.

One application per subspecialty program

US orthopaedic fellowship programs may apply for one fellowship grant up to \$75,000 each per subspecialty. OMeGA is not accepting applications from Canadian programs for the 2022-2023 academic year.

Covered expenses are the supported fellow's salary and benefits. Email OMeGA at info@omegamedicalgrants.org during the application process to request preapproval of other direct educational expenses, including dollar amount, if salary and benefit support is not possible. If approved, you will be asked to upload a copy of your educational expense request and OMeGA's approval email to your application prior to submitting. The approval for other direct educational expense support may be rescinded if you do not attach a copy of your request and OMeGA's approval email to your application.

Non-covered expenses include capital improvement (such as, but not limited to, addition of a permanent structural improvement or restoration of some aspect of a property that will enhance the property's overall value or increase its useful life); capital equipment purchases (including, but not limited to, items with an acquisition cost of \$5,000 or more, are not disposable or consumable, are stand alone, have a useful life of one year or more); malpractice insurance coverage; endowment funding; cellular telephone payments; parking fees; computer hardware or software; travel, meals, and housing for events/meetings/courses; research; license registration; license renewal; overhead (including indirect costs from shared services including facilities, utilities, libraries, physical plant operation/maintenance, administration, student services, and building/equipment depreciation); or other expenses prohibited by the Agreement.

[OMeGA's fellowship Grant Lifecycle Manager \(GLM\)](#)

If attempting to access the GLM and you're unable to use the link above, copy and paste, or type the following into your browser:

<https://www.grantinterface.com/Common/LogOn.aspx?urlkey=omegafellowship>

Use the above link when applying for a fellowship grant. Bookmark for future use.

Whether you have applied in the past or this is your first time applying for a grant with OMeGA, please read through the entire help guide first. We've included useful information about OMeGA's entire grant process as well as the online LOI and application. 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. Be sure you and your grants office can agree to OMeGA's Grant Recipient Agreement (GRA) before submitting your application. [Click here](#) to review a sample GRA. All grant recipients must sign the GRA. There will be no changes to the GRA.

Contact person

If the primary contact person will be away for an extended time during the application and review period, be sure to provide the alternate contact you've indicated in the LOI with the primary contact's login information. This person must have the primary contact's GLM User ID (email address) and password to access the application. The application will not be reassigned at this stage.

One person at one time

Only one person/GLM email login account will have access to the LOI and application at a time. Plan accordingly. Opening more than one tab or window at a time to the software will cause you to be unexpectedly logged off and your unsaved data will be lost.

Judicious uploading

Do not upload brochures, PowerPoint presentations or other pieces that were created for another use. Reviewers have many applications to review and are looking for concise answers to the questions asked.

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

It is recommended, and you may find it easier, to prepare information in a separate Word document, then copy and paste into the response boxes once all your information is together. Opening more than one tab or window at a time to the software will cause you to be unexpectedly logged off and your unsaved data will be lost. Also, the system times out and you are automatically logged out of the system after 90 minutes of inactivity. Unsaved information will be lost. *Remember to save often!*

We encourage you to have someone else read your completed application for accuracy and typographical errors.

2022-2023 fellowship academic year schedule

Application period opens – Tuesday, September 7, 2021

Application period closes – Tuesday, November 16, 2021, 5pm CST

Applicants notified of decisions – April 2022

Public announcement of grant recipients – June 2022 (or after all signed GRAs have been returned)

Installment dates

50% of funds distributed to grant recipients – August 1, 2022 (payment schedule may be adjusted if there are outstanding reports due from the subspecialty program from the preceding academic year)

40% of funds distributed to grant recipients – February 15, 2023 (or after the Midyear report has been submitted and approved, whichever is later)

10% of funds distributed to grant recipients – August 15, 2023 (or after the final report has been submitted and approved, whichever is later).

Grant recipient required reporting

Recipients are required to provide two reports through the online grant management system regarding the use of funds. Recipients are also required to provide acknowledgements through the online grant management system. All forms, additional tracked forms, and receipts must be submitted in English. All budgets, receipts and reconciliations must be submitted in US dollars. The payment schedule mentioned in the above section may be adjusted by OMeGA if there are outstanding reports due to OMeGA from the subspecialty program for any grant. Reports are reviewed and approved by OMeGA before payments are released.

Report due dates

A Midyear report providing basic information regarding the fellowship program, supported fellow, the supported fellow's activities including research, presentations, and procedures performed, and financial reconciliation to date is due February 1, 2023. The reporting period is 8/1/2022-1/31/2023.

The Final report is due August 1, 2023, and should describe attainment of fellowship objectives and outcomes, reconciliation of all expenses, and other requested information as described in OMeGA's report request documents. The reporting period is 2/1/2023-7/31/2023.

Qualified applicants

All orthopaedic teaching programs in the United States may apply for an OMeGA grant. Accredited or non-accredited programs may apply. Applications, attachments, and subsequent reports must be submitted in English. All budgets (including receipts and reconciliations if a grant is awarded) must be submitted in US dollars. OMeGA is not accepting applications from Canadian programs for the 2022-2023 academic year.

Fellows cannot apply for a grant directly

A fellow may help gather data needed for the grant application, but his or her name may not appear on the application or attachments and cannot be the applicant, primary contact, or alternate contact.

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 portion of the OMeGA grant that will not be used if costs are covered by other sources including another grant.

Required responses in the online LOI and application

Questions marked with an asterisk (*) on the right side of the question require a response. In addition, many questions have character restrictions and/or limited number of characters.

Enlarge the textbox view

Some application questions are answered in a textbox. To view all text entered or formatting/spacing, click and drag the three small diagonal lines at the bottom right corner of the textbox.

Paying the application fee

There is a \$35 fee for each application that must be paid before you can start the application process. Programs are strongly encouraged to pay the application fee before October 31, 2021.

Each application fee must be paid for separately to receive the unique 5-character receipt order number needed for each application. This order number can be used for only one application and will be used throughout the process. If a grant is awarded, the order number will be used as the Grant ID.

While the [AOA Store](#) will accept payment for more than one application at a time, do not consolidate application fees since 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 5-10 minutes for the application fee to be processed and your receipt containing a unique 5-character order number to be sent to the email address associated with your AOA account.

If the program or program director has an AOA account and password

1. [Click here](#) to be directed to the OMeGA application fee section of the AOA Online Store. If attempting to access the store and you're unable to use the link above, type or copy and paste the following into your browser:
<https://us-tdm-tso-15eb63ff4c6-1626e-170821ea938.force.com/LightningMemberPortal/s/store#/store/browse/detail/a156g000001T9WGA0>
2. In the quantity, choose only "1" and click "Add to Order."
3. In the pop-up window click on "Checkout."
4. Enter the email address and password associated with your AOA account
5. Enter the credit card information and billing address. MasterCard, Visa, and American Express are accepted.
6. Click "Process payment."
Repeat steps 2 – 6 if paying another application fee for a different subspecialty program.

If the program or program director has an AOA account but you have forgotten the password

Follow steps 2-4. When attempting to log in to the account, click the "Forgot your password?" function and a password reset email will be sent to the email address associated with the account.

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

1. [Click here](#) to be directed to the OMeGA application fee section of 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:
<https://us-tdm-tso-15eb63ff4c6-1626e-170821ea938.force.com/LightningMemberPortal/s/store#/store/browse/detail/a156g000001T9WGAA0>
2. In the quantity, choose only “1” and click “Add to Order.”
3. In the pop-up window click on “Checkout.”
4. Create an AOA account by entering your first and last name, username (use an email address), and password.
8. Enter the credit card information and billing address. MasterCard, Visa, and American Express are accepted.
9. Click “Process payment.”

You will not be able to apply until your payment is processed. An application fee receipt will be sent to the email address associated with your AOA account. The receipt contains a 5-character receipt order number. [Click here](#) to see where to find this number on the receipt. Make sure to save the order number to access your application.

Fellowship application process, LOI and application questions

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

LOI definitions and questions

Order number/Project name – This is the 5-character order number found on your paid application fee receipt. Do not substitute/interchange names and AOA IDs from what was used when paying the application fee.

AOA ID – This is the 2-, 3-, 4-, or 5-digit number associated with the person’s name used to pay the application fee.

AOA ID member name – This is the name of the person associated with the AOA ID used to pay the application fee. This name must be associated with the AOA ID but does not need to match the name of the person applying for the grant. Do not substitute or interchange names and AOA IDs from what was used when paying the application fee. This information is used strictly to track the payment and ensure it is applied properly.

Alternate contact information

Alternate contact – Include first and last name, title, email address and phone number of the person to be contacted if the primary contact cannot be reached. *The alternate contact (name, email, and phone)*

must be someone other than the primary applicant. This person does not have access to grant information unless the primary user provides them with login information.

Tax information

Tax status – Choose the tax status of your organization.

Tax identification number – Enter the tax identification number shown on the forms you will upload further down in the LOI. This number must be the tax identification number for the "Payments payable" name you will provide. *This tax identification number will be used for Open Payments reporting.*

Tax status form(s) – Upload your tax status form(s) as a PDF. Blank forms are available in the LOI and under the "Supporting documents" section of this Help guide.

Award organization name

Award organization name – Indicate the organization name as it should be listed in OMeGA's public notifications and on the grant recipient certificate if a grant is awarded.

Award organization city – Organization city.

Award organization state – Organization state.

Payment information

Payments payable to – This organization name must match the organization name provided for the tax identification number on the forms (W-9 and 501(c)(3) IRS Determination letter) uploaded in the previous questions. *This name will be used for Open Payments reporting.* Be sure to verify with your financial/accounting department this is the correct "Pay to the order of" information since the form cannot be changed after the LOI has been approved by OMeGA. (30-character limit)

Payment address – Provide a street address associated with the organization's payable name. The name of the individual responsible for tracking the payments is also required.

Payment payable address change – Indicate if any of the payment payable information has changed from what was provided in your LOI for this subspecialty last year.

Compliance

Agree to terms – You will not be able to proceed to the application stage if you do not agree to all terms: AdvaMed code and PhRMA guidelines, OIG guidelines, Anti-Kickback statute, and OMeGA's Grant Recipient Agreement.

Application questions

Order number/Project name – This is the 5-character order number found on your paid application fee receipt and the same number used on the LOI.

Amount requested – Indicate amount requested, not to exceed \$75,000 US dollars.

Covered expenses – Acknowledge your program will use funds for the supported fellow's salary and benefits. Email OMeGA at info@omegamedicalgrants.org to request preapproval of other educational expenses if salary and benefit support is not possible. If a grant is awarded, use of grant funds are verified and reconciled in two required reports throughout the academic year.

Non-covered expenses – Acknowledge your program will not use funds for non-covered items listed.

Organization information

Developing/Innovative or Established program – Indicate in which category your program is applying.

Developing/Innovative programs: Fellowship programs that are just starting and have no previous history or long list of achievements. A developing/innovative program is defined as: a) a program younger than three years, at the time the application academic year will begin, without prior funding; or b) a program based upon and primarily focused on a new multidisciplinary approach that addresses unique issues, ie: geriatric orthopaedics or combined adult reconstruction/trauma fellowship.

Note: Programs may receive up to two Developing/Innovative program grants within its first three years, one per academic year. Do not apply again as a Developing/Innovative program if your program previously received two Developing/Innovative program grants. Apply as an Established program.

Established programs: Fellowship programs that have been in existence for more than three years and have a history of graduating trained fellows for at least two years. Apply as an Established program if previously awarded two Developing/Innovative program grants.

Prior Developing/Innovative program application – Indicate if your program has previously applied as a Developing/Innovative program.

Program academic year – Indicate your program’s academic year start and end dates. Changes to a 12-month standard academic year may result in a reduced grant amount.

Program academic year, explain—If your program’s academic year is something other than August 1-July 31 or July 1-June 30, indicate the dates here.

Affiliation with an accredited residency program – Indicate (yes or no) if your program is affiliated with an ACGME accredited residency program.

Accredited residency program name – Provide the name of the accredited residency program. If none, write “Not applicable.”

Accreditation status – Select your fellowship program’s accreditation status from the drop-down list.

Accreditation body – Select your fellowship program’s accreditation body from the drop-down list.

Program information

Program description and quality of clinical facilities and resources – Using provided guidelines briefly describe your program. Be sure to comply with the guidelines based on your program selection earlier in the application (developing/innovative or established program). (2,000-character limit)

Clinical facilities and resources available to fellows – Use the check boxes to indicate what clinical facilities and resources are available to fellows in the subspecialty.

Future plans of fellows – Indicate the percentage of fellows in your program in the past five academic years who entered each of the listed positions (academic, additional fellowship training, military, private practice or other).

Qualifications and expertise of Program director and faculty

Program director, name – Provide the first name, middle initial, and last name of the program director.

Program director, degree – Indicate the program director’s degree.

Program director, email address – Provide the program director’s direct email address.

Program director, phone number – Provide the program director’s direct phone number.

Program director – subspecialty society member - List all societies to which the program director belongs. List all held officer positions. (2,500-character limit)

Program director, CV – Paste a concise CV using the appropriate required form provided. (10,000-character limit)

Other faculty (MD, DO and PhD only) – List all other faculty; include full name, degree, and title, year of Board certification, subspecialty and/or expertise, role and hours per week involved in teaching fellows. Include a list of recent publications (past five years, maximum of five publications) for each faculty member. (10,000-character limit)

Number of FTEs – Indicate how many full-time equivalent (FTE) teach in the fellowship program.

Number of faculty orthopaedic surgeons – Indicate how many full-time orthopaedic surgeons, including the program director, who are fellowship trained within the subspecialty of the fellowship and are actively engaged in the education of fellows for 8 hours or more per week.

Faculty and fellows

Definitions:

Full-time faculty surgeon is defined as spending at least 24 hours per week educating the fellow.

Full-time faculty surgeons to fellow ratio – Indicate the ratio of full-time faculty surgeons to fellows in the subspecialty program. Use the ratio format; ie: 1:1. A link to an online ratio simplifier is provided.

Match process – Indicate if your fellowship program participates in the program match process.

Match spots – Indicate the number of match spots that are in the fellowship match for the subspecialty.

Fellows in specified year-Spots offered/Spots appointed – Indicate the number of spots (including Match spots) offered and appointed in your program for the specified academic years.

Match spots unfilled – Indicate the number of Match spots that were unfilled for the specified academic years.

Number of applications received – Indicate the number of applications the program received for the specified academic years.

Fellow gender diversity – Indicate the number of female fellows who have graduated from your program in the past three academic years. Include the current academic year.

LGBTQ+ - Indicate if any of your fellows self-identify as LGBTQ+. This question is for aggregate statistical purposes and the program has the option to not answer the question.

Racial diversity – Indicate the number of underrepresented minorities currently or who have graduated from your program in the indicated three academic years.

African American or Black – Indicate the number of underrepresented minorities currently or who have graduated from your fellowship program in the specified three years that are African American or Black.

Hispanic or Latino – Indicate the number of underrepresented minorities currently or who have graduated from your fellowship program in the specified three years that are Hispanic or Latino.

American Indian or Alaska Native – Indicate the number of underrepresented minorities currently or who have graduated from your fellowship program in the specified three years that are American Indian or Alaska Native.

Number of female faculty – Indicate the number of female faculty who teach fellows in your program.

Number of underrepresented minority faculty – Indicate the number of underrepresented minority faculty who teach fellows in your program.

Method of formal evaluation – Describe the method of formal evaluation of fellows, faculty and the fellowship itself. Include 360-degree reviews, faculty reviews of fellows, how often each fellow is evaluated and who performs the fellow evaluations. (1,000-character limit)

Research, presentations, publications, and case logs

Environment of inquiry and research – Describe how your program provides research experience for your fellows. Detail the research facilities and resources as well as opportunities and requirements for research in your program. (2,500-character limit)

Research facilities and resources – Use the check boxes to indicate what research facilities and resources provide an environment of inquiry to fellows in the subspecialty.

Research projects – For each fellow in the program list all research projects in which the fellow was involved over the last three academic years. “Involved” means project design, submitting IRB application, data collection and preparation of manuscript. Do not exceed 10 projects per fellow. Include project title and all investigators. List projects by fellow. List each project only once. (7,500-character limit)

Innovation – Indicate how the program encourages innovation. Number and list the innovative projects the program offered as part of the fellows’ education over the past five years, including 2019-2020. (2,000-character limit)

New technologies and procedures – Indicate how the program embraced new technologies and procedures to educate fellows over the past two academic years, (2018-2019, 2019-2020).

Regional/state/national/international podium presentations outside your institution – List the presentations given by fellows at regional/national/international meetings outside your institution during the last three academic years that resulted from program activity. Do not include weekly conferences and/or grand rounds. Do not exceed 10 presentations per fellow. Include presentation title, name of meeting, location (ie: subspecialty annual meeting), audience, and date presented. List projects by fellow. (7,500-character limit)

Number of publications – Provide the number of publications authored or co-authored by fellows for the academic years indicated. Count each publication only once.

Publications – List the publications (articles and book chapters) by academic year authored or co-authored by fellows in your program (first author only) that have been published in peer reviewed journals or book chapters during the last five academic years. Do not exceed 10 publications per academic year. Include article title, medical journal or publication name, publication date (past or pending), [fellow name] in brackets, and all other authors. (Note: fellows must have been in your program while doing the research, but not necessarily when the article was published.) List publications by academic year. (7,500-character limit)

CPT codes/procedures performed and cases – Following ACGME case log guidelines, report the number of procedures performed by CPT codes during the previous academic year for the entire subspecialty program for all fellows in your program. Include all procedures where fellows were Level 1 (primary or supervising surgeon) or Level 2 (first assistant). Provide all information requested on the form.

Download the *required form* (linked in the application), complete and then upload to the application. Use of the linked form is required. (5 MB file size limit)

Number of cases – Following ACGME case log guidelines, report the number of cases performed by all fellows in your program during the previous academic year. While multiple CPT codes may apply for some cases, count one primary code for each case. An excerpt from the guidelines and a link to the complete ACGME guidelines is provided in the application. Note: This number may or may not match the number provided for the above case log/CPT code question. Each *case* can have one or more *procedures* (CPT codes).

Number of cases, number of fellows - Report the number of fellows in your program during the previous academic year who performed the cases reported above.

Average number of cases per fellow – Using the numbers provided in the previous two questions, report the average number of cases per fellow.

Top three reasons – Provide additional insight about the program. Include items OMeGA should know about your program that weren't previously mentioned. Items that make your program exceptional or opportunities available for the education of fellows in your program that weren't previously mentioned.

Funding overview

Funding – Provide the percentage of funding received from each of the following sources for the prior academic year for your subspecialty program, not the entire orthopaedic department. Ensure the total equals 100.

Billed percentage

Department/Faculty/Medical Center percentage

Government percentage

Institution or institution foundation percentage

External funding, Industry percentage

Third party (OMeGA)

Third party (AANA, AO Foundation, AOFAS, ASES Foundation, COTA, NREF,) percentage

Other percentage

Funding source – List all funders external to your subspecialty program as indicated in percentages indicated above. (500-character limit)

Budget overview

Budget – Indicate how requested grant funds will be allocated by providing a US dollar breakdown of funds for salary and benefits.

Additional suggestions and comments

Additional comments – Add additional information not previously stated in support of your application. This is not a required question.

Additional documents – Upload additional documents in support of your application. This is not a required question.

OMeGA's process – Provide comments/suggestions of what could be done differently to improve OMeGA's process. This is not a required question.

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 90 minutes, you will be logged off for security reasons. Unsaved information will be lost. *Remember to save often!*

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 in the *fellowship* Grant Lifecycle Manager:

1. Enter your GLM login, (your email 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 GLM User ID, which is your email address, and the system will send a password reset email to you.

If you do not have an existing account:

5. Click on “Create New Account” to register. See diagram

The screenshot shows the OMeGA (Medical Grants Association) Logon Page. At the top left is the OMeGA logo. The page title is "Logon Page". Below the title are two input fields: "Email Address*" and "Password*". Below these fields are two buttons: "Log On" and "Create New Account". Below the buttons is a link that says "Forgot your Password?". Three callout boxes provide additional information:

- The top callout box points to the "Log On" button and states: "Applicants who have previously registered can access their account by entering their GLM User ID (email address) and password. The system is case sensitive."
- The middle callout box points to the "Create New Account" button and states: "New applicants must register themselves and their organization before gaining access to the Grant Lifecycle Manager (GLM). The system is case sensitive."
- The bottom callout box points to the "Forgot your Password?" link and states: "Click here to enter your GLM User ID (email address) and receive a link to reset your password. The system is case sensitive."

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.

Entering a password

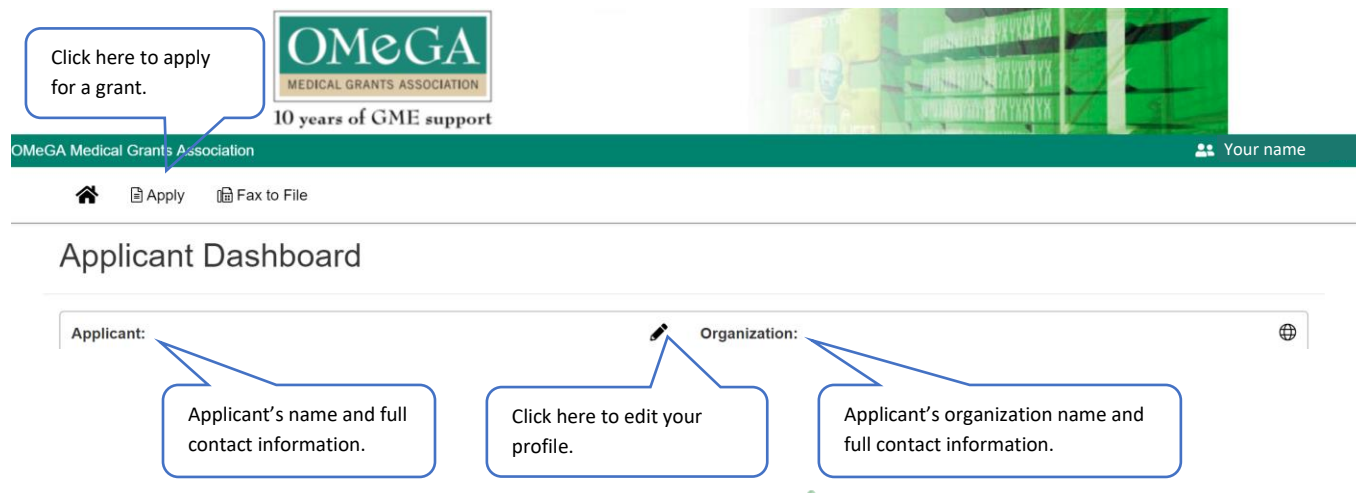
1. After you have registered your account, you will be taken to a "Set Password Page" where you will enter your password.
 - a. Click "Save" after entering the password.
2. If you wish to change your password, login to your account and click on the pencil icon (✎) opposite your name. This will allow you to change your information.

Applicant dashboard page

After you have registered your account, you will be directed to the Applicant Dashboard.

1. Apply – This allows you to review the available grants and apply.
2. Dashboard – This is your homepage where you can check the status of your grants. This page will display the form you just completed, its status, and the next form to complete, if available.
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 dashboard page diagram



Choosing a grant program

After clicking on “Apply” you will see a link to grant applications, one for each subspecialty. Scroll the page and select the subspecialty in which you would like to apply for a grant. Repeat the process if you will be completing an application in more than one subspecialty. Each US program may apply once in each subspecialty.

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 already paid the \$35 application fee and received the 5-character receipt order number, click on the grant program to start filling in the first form: LOI (Letter of Inquiry). OMeGA does not use an Access Code, so please disregard this text box.
2. The application process has two forms: LOI and application. The LOI must be approved before the application is visible.

Completing the LOI

1. Before starting the first form, LOI (Letter of Inquiry), you will need the receipt order number that is found on your paid application fee receipt email. This is a unique 5-character 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. File upload questions have size limitations indicated in Mega Bytes (MB).

3. Applicants can save forms as a draft and come back to the form after any given time to complete it. You must click “Save” at the bottom of the form to avoid losing the answers already completed. OMeGA will not review forms until submitted. See diagram.

Save or Submit LOI/Application diagram.

check payable answer.

W-9 form
The organization name on the W-9 form and the check payable name must match. The W-9 form must be current, signed, and dated.

Click here to submit your LOI.

Click “Save LOI” to avoid losing answers already completed.

Save LOI Submit LOI

- a. You will receive a confirmation email 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. The LOI will be reviewed within 3-4 business days. OMeGA will review and either approve or return for corrections. If the LOI is returned for corrections, complete as necessary and re-submit. You do not have 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. You must click “Save” at the bottom of the form to avoid losing the answers already completed. OMeGA will not check for completeness until the form is submitted.
 - a. There will be a confirmation page after forms are submitted. Refer to your Application Dashboard Page to see what stage each form is in.

Sample workflow page.

Management Software provided by Foundant Technologies © 2018

Project Name* Response required. If a required response is blank when submitting, a reminder will populate indicating a response is required.

Project Name is Required

Amount requested*
Enter the amount requested, not to exceed \$75,000 US dollars. Do not enter special characters such as dollar sign, comma or decimal.
\$

Program description*
Briefly describe your program. Address items mentioned above for your appropriate application category (Developing or Established program).

Character limit. 2,000 characters left of 2,000

Resize the text area by dragging the corner.

Additional documents
Upload any additional documents in support of your application. This is not a required question.
Upload a file [5 MiB allowed] MB limit.

Save the form and keep working.

Submit the form to OMeGA. Once submitted no changes can be made.

Save Application Submit Application

Accessing forms after “Save” and “Submit”

The Applicant Dashboard is your homepage. You will be automatically directed there when you log in. You can check the status of your application on the Applicant Dashboard and access it for historical record keeping.

1. You can view the LOI and application at any time by clicking on Edit/View LOI or Edit/View Application, depending on the stage. No changes can be made once the form has been submitted.
2. You can Edit the saved form from the Applicant Dashboard 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.

Supporting documents

Links to current tax forms to be used in the LOI are below. These forms are also linked within the LOI.

[W-9](#), – Request for Taxpayer Identification Number and Certification

[501\(c\)\(3\)](#) – Section 501(c)(3) organizations

Upload the following documents as Word or Excel files. Do not convert to PDF.

[Program Director CV](#)

[Faculty Director CV](#)

Your grant will be reviewed for completion by OMeGA after you have formally submitted. We will request additional information via email if your application is incomplete. Programs have five business days to provide the necessary information before the grant request is closed. You will have two business days to return your information when the application deadline gets closer or if OMeGA contacts you after the application deadline date. This will be noted in the request for additional information email that is sent.

Once all information is completed, the Review Committee will review your application and may also request additional information. Be prompt in providing the information requested within the timeframe communicated at that time. Your application is not reviewed and not eligible for a grant until the requested additional information is submitted. The Review Committee will then recommend or deny the grant request. We will communicate the decision to the applicant by email.

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 a sample 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 United States to which OMeGA provides grants.

Required reports

Grant recipients are required to provide OMeGA with two reports regarding the use of awarded funds. Timely, accurate and thorough reports must be completed using the online Grant Lifecycle Manager (GLM), without modification, including additional data tracked on required OMeGA forms for case logs and use of funds summary. Applicable professional fees for the fellow's services must be billed by and retained by the Recipient. Applications, attachments, and subsequent reports must be submitted in English. All budgets, including receipts and reconciliations, must be submitted in US dollars.

Letter of Inquiry (LOI), application, attachments, subsequent reports, acknowledgements, forms, additional tracked forms, and receipts must be submitted in English and have been incurred in the grant period. All budgets, receipts and reconciliations must be submitted in US dollars. The Midyear report is due February 1 and the Final report is due August 1. Additional or follow up information must be provided within the timeframes established by OMeGA.

All funds expended

Several of OMeGA's donor agreements for the 2022-2023 academic year state unused funds must be returned to the donor. Returning funds is counter-productive to OMeGA's mission. If your program will not utilize all funding provided, we will offer any excess funds to support another meritorious program in the same subspecialty during the same academic year. By doing this, OMeGA can provide funding to more programs that need support. Grant recipients must notify OMeGA by February 1 and with the Midyear report if all award funds will not be used for allowed expenses by July 31, the end of the academic year.

We have had several situations where the program has confirmed funds expended and/or ability to use additional funds then have the organization's accounting/financial department reverse this confirmation at a later date. Ensure your organization's accounting/financial department is in complete agreement with your financial assessment by the required dates so OMeGA can distribute funds most effectively.

Penalties

If required items, acknowledgements and reports are not submitted by the established due dates, the payment schedule for all subspecialty program grants will be suspended, the current grant may be rescinded, subsequent grants already communicated for future years in the subspecialty will be rescinded, and the Recipient's subspecialty program will be ineligible to apply for a grant for one additional funding cycle.

If the program indicates all funds will be used in the Midyear report and then reconciles indicating unused funds of any amount in the Final report, subsequent grants already communicated for future years in the subspecialty will be rescinded. In addition, the Recipient's subspecialty program will be ineligible to apply for a grant for one additional funding cycle.

If the final report shows unused funds or if OMeGA determines that funds have been used for purposes other than those specifically approved in the grant application, the recipient must reimburse OMeGA all unused or improperly used funds within 45 days of the final report due date. If reimbursement is not received within 45 days of the final report due date, subsequent grants already communicated for future years in the subspecialty will be rescinded, and the Recipient's subspecialty program will be ineligible to apply for a grant for one additional funding cycle. The Recipient's subspecialty program will be ineligible to apply in any grant cycle until the reimbursement amount has been received by OMeGA.

It is the Recipient's responsibility to track and ensure all payments have been received and routed to the correct location. Payments that have not cleared OMeGA's bank within six (6) months will not be reissued and the grant will be rescinded. Read a sample [Grant Recipient Agreement \(GRA\)](#) for complete report requirements, payment schedule, and penalties.

If you have any questions, please email: info@omegamedicalgrants.org.

Thank you,

OMeGA Medical Grants Association

omegamedicalgrants.org