"la Caixa" Foundation

Manual for Submission

HealthCare Research Call

Call for Proposals 2026

2026

A world to discover

Contents

0. Video Tutorial

Please click here to access a **step-by-step tutorial** of the application process.

1. User registration

The online system can be accessed through the link: "la Caixa" Foundation (fundacionlacaixa.org)

1.1. Registration

Users can register on the login page by clicking REGISTER. Then, select one of the following options:

» RESEARCHER AND CSO for Project Leaders, Partners or CSO representatives.

» ORGANISATION MANAGER (for the Host Organisation representative in the system). Organisation Manager must select the option RESEARCH AND INNOVATION PROJECTS IN LIFE SCIENCES OR SOCIAL SCIENCES.

A form for entering contact details will then appear in a new window. All users must register linked to an Organisation, which should appear in the list. If your organisation is not in the existing list, it can be included by entering its name and identification details (NIF if the organisation is Spanish and VAT number if it is Portuguese) (see 1.2). Please link your user to the Organisation applying in the Call, as **this Organisation will sign the Grant Agreement if the proposal is selected for funding**.

Each user must register only one user profile in the system with their personal data (name, valid ID and email – institutional email recommended). The email introduced by the PL and the OM will be used to send all important information related to this Call. All data submitted must be accurate. Duplicate registrations and/or registrations containing false information are not permitted (e.g. **one natural person may not register in the system with more than one ID**). Non-compliance with this requirement is a serious breach of the online system's terms of use and policies.

After completing the user registration, you will receive an email with an **activation** link to set your password. We recommend that you check and/or complete your profile by accessing your PERSONAL PROFILE via the button in the upper right-hand corner and clicking **Update Profile**.

If you experience technical problems, please contact healthresearch@contact.fundaciolacaixa.org.

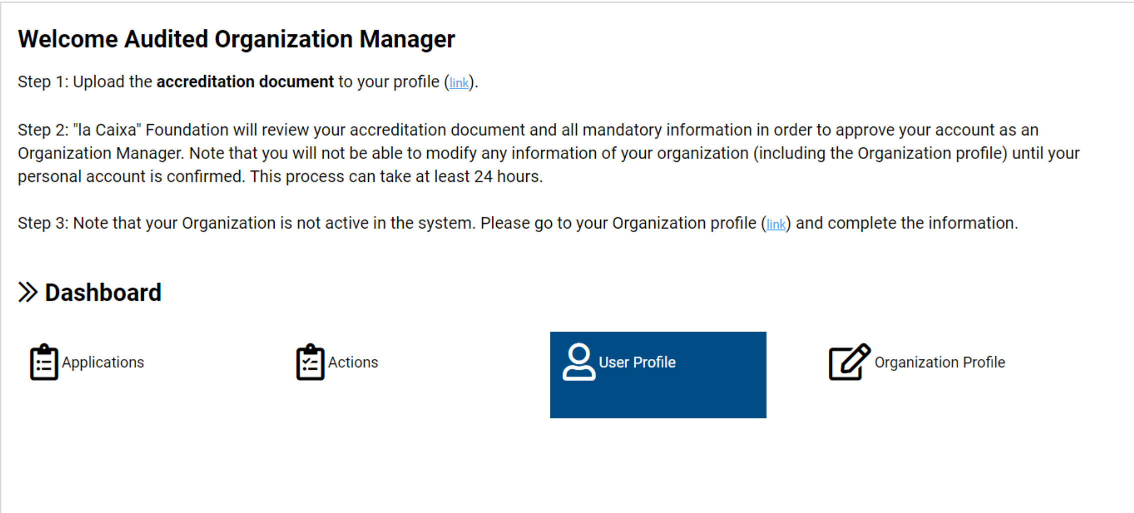
1.2. Organisation Manager (OM) Profile

If you are an Organisation Manager, you will find different shortcuts on your homepage:

a) User profile shortcut: use this to complete your personal profile and to upload the accreditation document. For the accreditation document, after clicking the User Profile shortcut, go to the Documents section, download and complete the template for the accreditation document. Include all required documentation in a single PDF and upload it to the system.

   Once the profile has been updated with the information and the required documents, please wait for the program office to **validate** your submission. This may take at least 24 hours, so we recommend completing this step well in advance.

b) Organisation profile shortcut: if your organisation is not yet active, complete the information in the **Organisation profile** shortcut. The program office will also validate the Organisation information.



2. First steps to create an application

2.1. Start a proposal as Project Leader (PL)

To initiate a new application, Project Leaders (PLs) must first locate the call they wish to apply for in the **Open Calls shortcut**, on the homepage. After selecting the call by clicking on the CALL DETAILS button, you can create an application by clicking APPLY NOW. As PL, some eligibility conditions are required here in order to start an application, including being linked to a Host Organisation based in Spain or Portugal, having no more than one active application in the current call, not having an ongoing funded project as a PL in the previous two or three editions of the HealthCare Research Call.

When you click **APPLY NOW**, a **pre-draft application** is created. At this point, the PL gains access to the first tab: General Data and Information. When clicking the **CONTINUE** button, it will become a **draft application,** giving you access to the full application form (see section 3). The draft can be edited until it is submitted by the PL.

Once a draft version has been created, the OM will receive a notification email indicating that they can view the proposal and **endorse** it (see section 2.2). This step can be **completed at any time before the project is submitted**, as it does not affect the PL's ability to edit the proposal. However, it is required for final submission of the proposal.

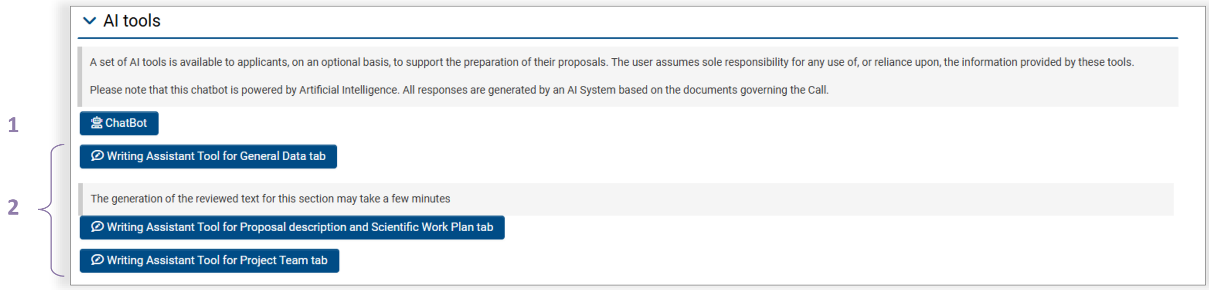
The PL can save and subsequently edit a draft version of the application until the deadline. **Only one draft may be active in this call.** You can save it by clicking **SAVE DRAFT** and it may be deleted at any time before the deadline by clicking **WITHDRAW**. Please note that withdrawn drafts cannot be recovered.

A **VALIDATION** button is available during the application process to check whether the data provided thus far is correct and complete. We recommend using this validation regularly throughout the process to avoid last-minute issues. The application is not submitted to the "la Caixa" Foundation until the **SUBMIT** button has been clicked.

2.2. AI tools to support proposals' preparation

While preparing the proposal, a set of Artificial Intelligence (AI) tools will be available, on an optional basis, to support its preparation. These tools are:

- Chatbot (1): provides answers to questions related to the call, including the submission process, based on the documents of the call published in the "la Caixa" Foundation website.
- Writing Assistant Tool (2): suggests language corrections for the proposal text once it has been saved, without generating new content. The tool is divided into three buttons, each triggering the revision of the sections for each tab where it is available: "General data and proposal information", "Scientific excellence and impact", and "Project team".
- These tools are hosted on private servers, and the information shared with them is not made public.



2.3. Endorsing a proposal by the OM

To endorse a proposal, the OM must click OPEN and AUTHORISE the proposal that can be found in the **Actions - Project Acceptance section** of the OM homepage. You can view the full proposal by clicking ACTIONS and then See applications to access the split view.

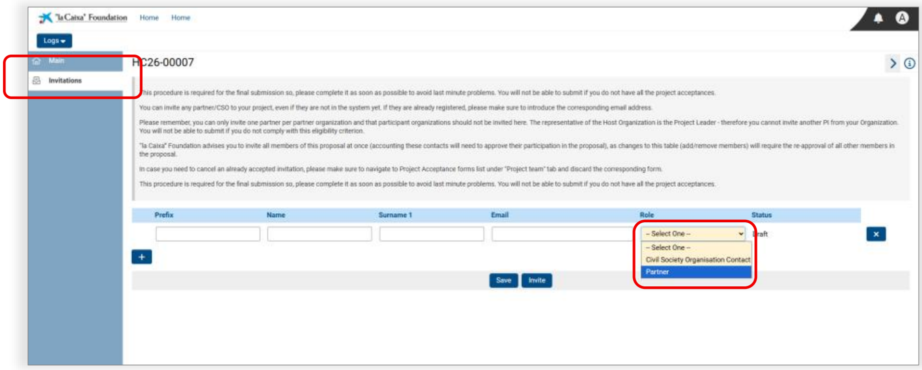
The endorsement of a proposal by the OM is mandatory before submitting it. Please ensure this validation is completed in good time.

2.4. Invitations to Partners and CSOs

In Research Consortium proposals, Partners must be invited by the PL to join the project team. Likewise, in proposals with Civil Society Organisations (CSOs), the representative must also be invited by the PL. Only PIs and CSO representatives should be invited to participate in the proposal; team members and participant organizations should not be invited.

Remember that only one partner per Partner Organisation may be invited. The Project Leader is the main representative of the Host Organisation, and therefore no other PI from the same organisation can be inivited to the proposal. If you do not comply with this eligibility criterion or invite a member with an incompatible role, the system will automatically remove the user from the application and send both of you an email explaining the reason.

If you have already invited a member of an organisation but now prefer to invite someone else instead, you will need to remove the first invitee before sending a new invitation to someone from the same organisation (see the instructions below on how to discard a participant). You will always be able to re-invite any previously discarded participant at a later stage if needed.



The "la Caixa" Foundation recommends inviting all members of this proposal at once (given that each invitee must approve their participation in the proposal). Subsequent changes to the participant list (e.g. removal of members) will trigger the re-validation requirement for all other members.

Each partner and CSO representative receiving the invitation must register if they are accessing the system for the first time and validate their participation in the proposal.

Partners and CSOs that register in the system before receiving the invitation must register as applicants.

Please ensure that the email address used for the invitation of **Partners and CSO representatives is the same as the one used for their registration**. This is especially important when the Partner or CSO representative is already registered in the online system: always use the same email address they used to create their account.

All the invitations can be managed through the **INVITATIONS** tab in the left-hand side menu of the proposal. Click the "+" button to invite participants by entering their name, email address and role in the proposal.

If they accept the invitation, they will be directed to the registration site (the same site described in 2.1) or they can access the system directly if they are already registered.

Once they have accessed the system, participants will be able to view the proposals they have been invited to join on the homepage, in the **ACTIONS-PROJECT ACCEPTANCE** section.

Click **OPEN** to view the acceptance form. Partners and CSO representatives can access the full proposal by clicking the **ACTIONS** button on the upper left corner.

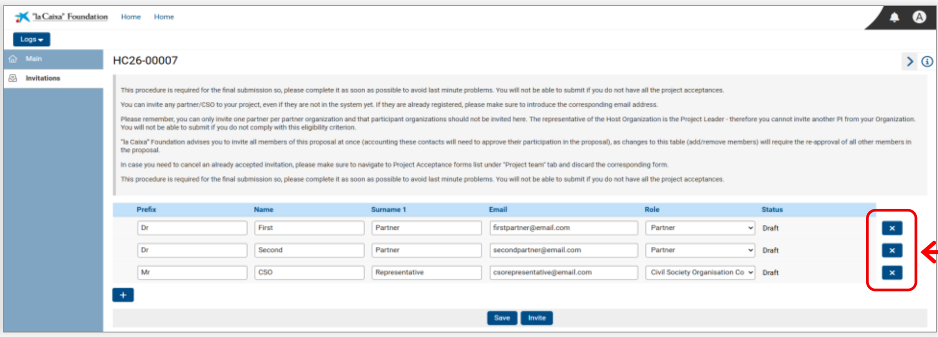
As participants, they will be able to view the entire proposal, but will not have editing rights.

Participants must accept their participation in the project before submission.

Once accepted, the PL will be able to add Partners and CSO representatives in the **PROJECT TEAM** tab.

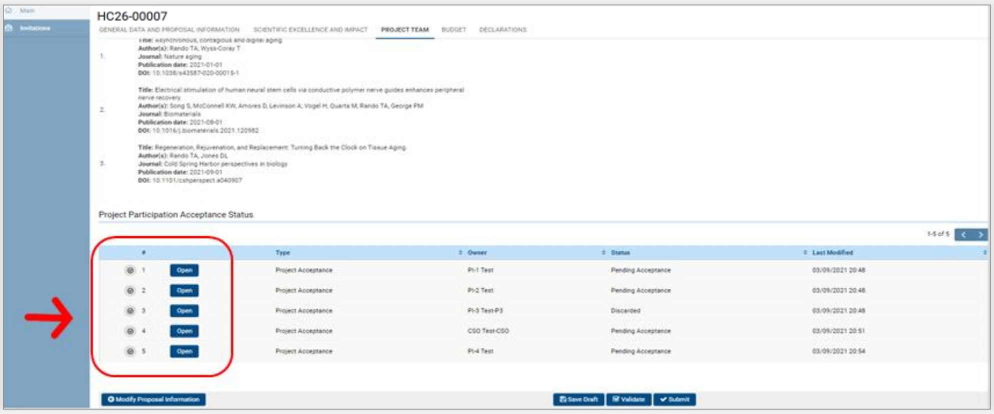
If any of the participants decline the invitation, PLs must delete them from two separate places:

1) Invitations section: Click the "x" to delete the invitation



2) Project participation acceptance table in the **PROJECT TEAM** tab: Click **OPEN**, then **DISCARD** in the new window displaying the Partner's project acceptance form.

In this section, Partners or CSO representatives who have not accepted their participation, or who have been removed by the PL, will remain on the list marked as **DISCARDED**.



3. Guide for the proposal sections

General information

For all applications, each field **must be completed in English** and in accordance with these guidelines and the instructions provided in the online system.

Text from word processing documents can be copied and pasted into most text fields of the application. However, it is important to check that special characters and symbols have not been altered or lost in the text fields after copying and pasting. Each text box has a character limit including spaces (**CWS: characters with spaces**). Formatted text (bold or coloured letters, italics, subscripts, superscripts, etc.) is not supported in the system.

To prevent loss of data, it is essential to click **SAVE DRAFT** before logging out or navigating to another page in the online system. Saving is also necessary to properly view certain information introduced, such as the budget table and publications list.

A **VALIDATE** button is available during the application process to check whether the data provided thus far is correct and complete. We recommend using this validation regularly throughout the process to avoid last-minute issues. The application is not submitted to the "la Caixa" Foundation until the **SUBMIT** button has been clicked.

3.1. General data and proposal information

This initial section (General data and proposal information) must be completed in order to access the rest of the proposal by clicking CONTINUE. Once CONTINUE is selected, the "Proposal description" field and "Classification of the application" sections will be blocked for legal purposes. These fields can still be modified by clicking MODIFY PROPOSAL INFORMATION, but then re-acceptance of the proposal by any participating partners will be required and the budget will be cleared.

3.1.1. Application details

Proposal Title (max. 100 characters with spaces, CWS).
Proposal Description (max. 200 CWS).
Proposal Acronym (max. 20 CWS).

3.1.2. Classification of the Application

Select your Proposal Category.

Select the type of your proposal. Individual or Research Consortium.
Does your proposal include Civil Society Organisations?

3.1.4. Information for internal classification (solely used for monitoring/statistical purposes).

3.1.5. Keywords

Keywords must be selected based on the NIH MeSH tree *https://meshb-prev.nlm.gov/treeView* (ensure you use the most recent version). You should select from 1 to 3 main keywords and 3 to 5 additional keywords.

You can search the keywords by code, heading or description.

Please take into account the importance of these keywords for the correct assignment of evaluators to your proposal. Further details are available in the online system.

3.1.6. Proposal information

Scientific Abstract. *(max. 2,000* CWS*).*

Lay Summary. Briefly summarise the proposal for a non-expert audience. *(max. 1,000* CWS*).*

3.2. Proposal Description and Scientific Work Plan

3.2.1. Project Rationale and Objectives

Need or problem to be solved in the context of the State of the Art. Describe the unmet need or problem the project addresses. Describe the reasons behind the development of the project. Explain the scientific excellence and originality of the proposal in the context of the 'state-of-the-art'. *(max. 2,500* CWS*).*

Impact of the project. How do you expect your intervention to improve the identified need and the health sector?. *(max. 3,000* CWS*).*
Project aims and objectives. Describe the project aims and objectives, the approaches to achieve them, and to what extent they go beyond the state of the art. *(max. 3,000* CWS*).*

3.2.2. Scientific approach and work plan

Scientific Rationale and methodology. Describe the scientific rationale underlying your idea, including preliminary data. Describe the methodology to appropriately develop the intervention and/or evaluation. You can take as a reference the Magenta Book and Magenta Book Annex A, from the UK Government. *(max. 12,000* CWS*).*

Work plan and timeline. Describe the activities and timeline required, taking into account the contributions of each Partner Organization, if applicable. Ensure that the proposed timescales are necessary and properly justified. Include a project Gantt chart in the "Gantt Diagram of the proposal" section.. *(max. 2,000* CWS*).*

Proposal task Gantt Chart (see instructions for completing the Gantt chart*****).

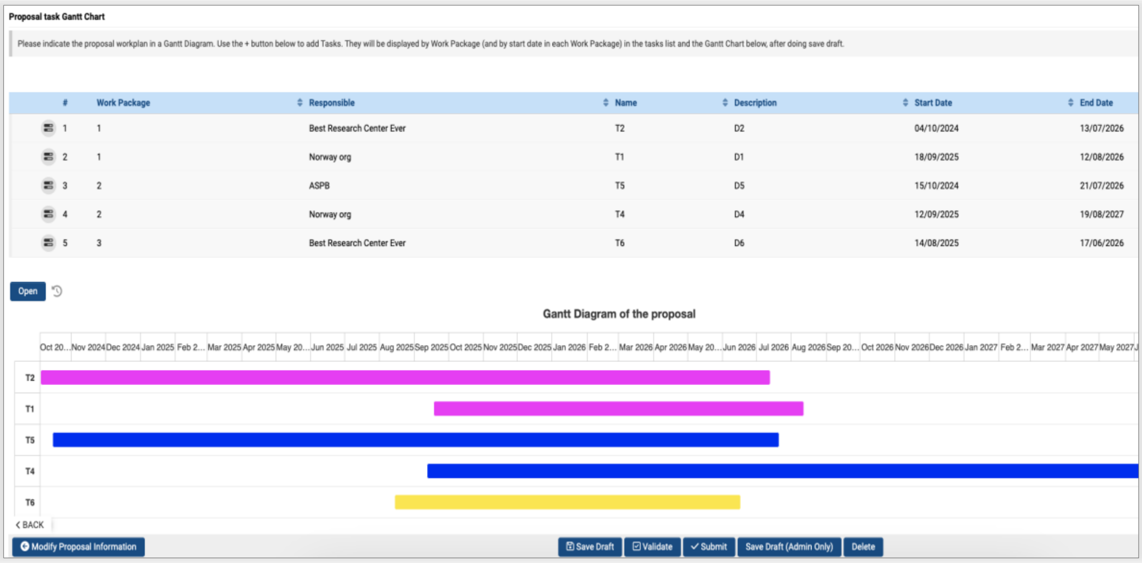
Study limitations and contingency plan. *(max. 1,500* CWS*).*

*****To generate the GANTT DIAGRAM, go to **Proposal Task Gantt Chart** and click OPEN to add information for each task.

In the table, add tasks by clicking the "+" button. Assign a **Work Package (WP)** number **to each Task**. Then, for the organization **Responsible for the Task**, you must choose a member from the dropdown with all the partners who have accepted the invitation to participate in your proposal. Click SAVE if you wish to return to the task later. You will be able to edit or add new tasks at any point during your submission.

The task will appear in the Proposal Task Gantt Chart. Finally, to generate the **Gantt diagram** you must click SAVE DRAFT in your proposal.

The Gantt diagram will be automatically organised by WP and start date (within each WP), and it will not be possible to apply any alternative sorting.



3.2.3. Ethics and Dissemination

» **Ethical, social, legal and environmental project implications.** *(max. 2,000* CWS*).*

» **Dissemination of the project results**. *(max. 1,000* CWS*).*

3.2.4. Scalability plan.

3.2.5. Figures and tables.

Documents with figures/charts/tables/images etc. related to the project description can be uploaded in this section (not mandatory). **Only one PDF with a maximum of 3 pages is allowed**, which will be integrated in the final application PDF.

3.2.6. References

References and publications (section 3.3.2) are two separate entities for the system, and both require a similar process.

» Click the +ADD REFERENCE button.

» To add references manually, insert the required information, then save and close the window. Click SAVE DRAFT on your application to update the Reference section.

» To import from PubMed, WoS or Scopus, click the TOOLS button to switch to PUBLICATION SEARCH. Search by title, author or keywords such as the DOI. Select the reference from the list and click the "+" button.

» Click the CREATE TRANSACTION button to assign the reference to the application. Close the Transaction List window and click SAVE DRAFT to update the Reference section.

» You can repeat the search and transaction process as many times as needed to complete the reference list.

» To order the references, click the EDIT REFERENCE LIST button. You can confirm the current order or rearrange the items using the drag-and-drop feature.

» Once the order is finalised, close the window and click SAVE DRAFT.

» You can re-order, edit or delete any reference by clicking the EDIT REFERENCE LIST button.

3.3. Project Team

3.3.1. Members of the Project

Justification of collaboration within the Research Consortium (if applicable). Explain how the teams of the Research Consortium support the Proposal's objectives, providing a description of the governance, expertise, organisational and functional structure of the Research Consortium members, as well as the coordination mechanisms. *(max. 4,000* CWS*).*

3.3.2. Project Leader

» **Research experience since completion of PhD.**

» **Project Leader expertise and motivation.** Describe the expertise, dedication and motivation of the Project Leader to execute the proposal.. *(max. 3,000* CWS*).*

3.3.3. Project Team

» **Table of participant organizations in the proposal.** Add to this table the organizations actively involved in the design, development and/or execution of the project with or without budget.

By clicking the "Open" button, you will access a table to be completed with all participant organizations. Add any organizations that are missing and specify the role of each organization in the project.

» **Project Team.** Describe the expertise, dedication, relevance and complementarity of the project team and partner profiles (if applicable) in order to achieve the listed objectives of the project. *(max. 6,000 CWS)* **Team publications related to the proposal.** Provide a minimum of one and a maximum of five of the whole project team most significant peer-reviewed publications that support the proposal (see instructions below*).

***** Adding Publications requires the following steps:

» Click the +ADD PUBLICATIONS button.

» To add publications manually, enter the required information, then save and close the window. Click SAVE DRAFT on your application to update the Publications section.

» To import from PubMed, WoS and Scopus, click the TOOLS button to switch to PUBLICATION SEARCH. Search by title, author or keywords such as the DOI. Select the reference from the list and click the "+" button.

» Click the CREATE TRANSACTION button to link the selected publication to the application. Close the Transaction List window and click SAVE DRAFT on your application to update the Reference section.

» You may repeat the search and transaction process as many times as needed to complete the list of publications for the proposal.

» To order the publications, click the EDIT PUBLICATION LIST button. You can confirm the current order or rearrange them using the drag-and-drop feature.

» You can always re-order, edit or delete any reference by clicking the EDIT PUBLICATION LIST button.

» Once the ordering is complete, close the window and click SAVE DRAFT to display the publications at the bottom of the PROJECT TEAM tab.

» When your list of publications is complete, go back to **Team publications related to the proposal** and click OPEN.

» Select the DOI and complete the Significance of the publication field. The order number will appear automatically in the table once the DOI is selected.

Any changes made to the publications list will require the table to be updated by re-opening the entry and saving the correct information.

3.4. Budget

To complete the BUDGET, click OPEN to access the table and enter the required information. A more detailed budget table with the distribution by Partner Organisations and Civil Society Organisations must be completed in the online system (including amounts and comments) by clicking the OPEN button. Before entering any information, click SAVE to display only the columns corresponding to those participants who have fully accepted your invitation (for both steps, see section 2.3 of this document). Please ensure the online system is set to English and use the full stop "." as the decimal separator. Add comments to explain all budget-related items.

Click Save Draft to update the overview calculation.

3.5. Declarations

DECLARATIONS is the final section to be completed before submission.

4. Submitting the application

The application in its entirety must be submitted electronically via the online system by clicking SUBMIT **before the closure date** (see *Rules for Participation*). It is not possible to submit an application, or any part of it, by standard post or email. Any material submitted outside the online 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 screen when submitting or validating the proposal. Clicking on each individual line within the box will take you directly to the corresponding field. The grey box will disappear when you select **SAVE DRAFT**. This allows you to continue with the application and submission.

You can verify that the data provided is correct by clicking the **VALIDATE** button. Amending incorrect entries can be time-consuming, so we strongly recommend validating your application well in advance of the deadline.

The entire application, including all entered information, can be downloaded as a PDF by clicking **APPLICATION SUMMARY**. We recommend checking the PDF to ensure it is legible and correct before submitting your application. Once submitted, your application will appear in **SUBMITTED** proposals on the homepage. Please verify that it contains all the information entered in the system. If you notice any discrepancy, please contact the program office.

! Please finalise your submission on time.
No proposal will be accepted after the deadline **(automatic closure).**

Once the application has been submitted, you will receive confirmation of receipt by email. Your proposal should then appear in the "Submitted" shortcut on your homepage. If it does not, please contact the "la Caixa" Foundation as soon as possible: healthresearch@contact.fundaciolacaixa.org.

If you wish to withdraw a submitted application after the deadline, you should contact "la Caixa" Foundation directly.