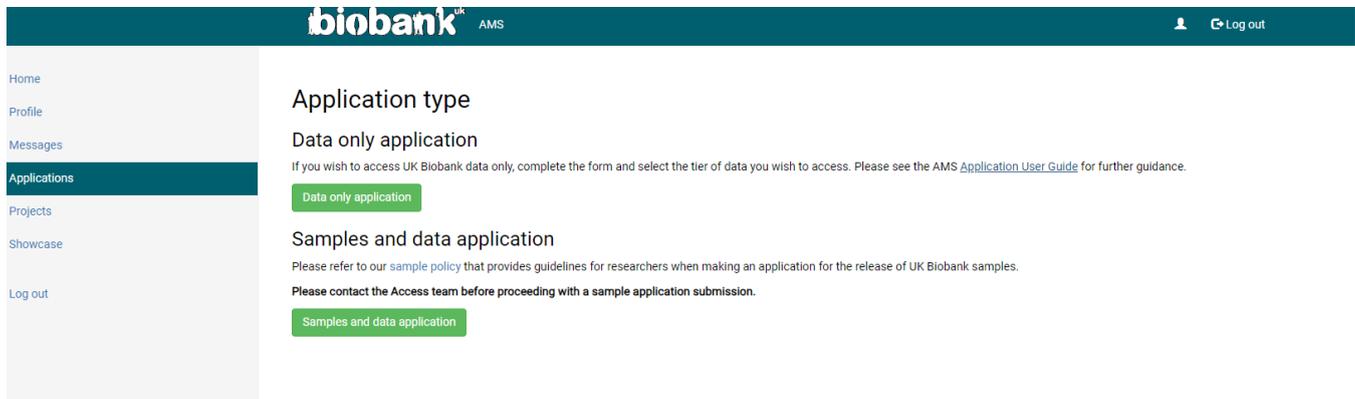


## 1. Submitting an Application

### 1.1 Completing the online application

- Once your Registration has been approved a number of new tabs will become visible on the left hand panel of your AMS Home Page.
- To start a new application, select the 'Applications' tab and 'Start new application':



The screenshot shows the 'Applications' page in the Biobank AMS system. The left-hand navigation menu includes 'Home', 'Profile', 'Messages', 'Applications' (highlighted), 'Projects', 'Showcase', and 'Log out'. The main content area is titled 'Application type' and lists two options:

- Data only application**: A green button labeled 'Data only application'. Below it, text reads: 'If you wish to access UK Biobank data only, complete the form and select the tier of data you wish to access. Please see the AMS [Application User Guide](#) for further guidance.'
- Samples and data application**: A green button labeled 'Samples and data application'. Below it, text reads: 'Please refer to our [sample policy](#) that provides guidelines for researchers when making an application for the release of UK Biobank samples. Please contact the Access team before proceeding with a sample application submission.'

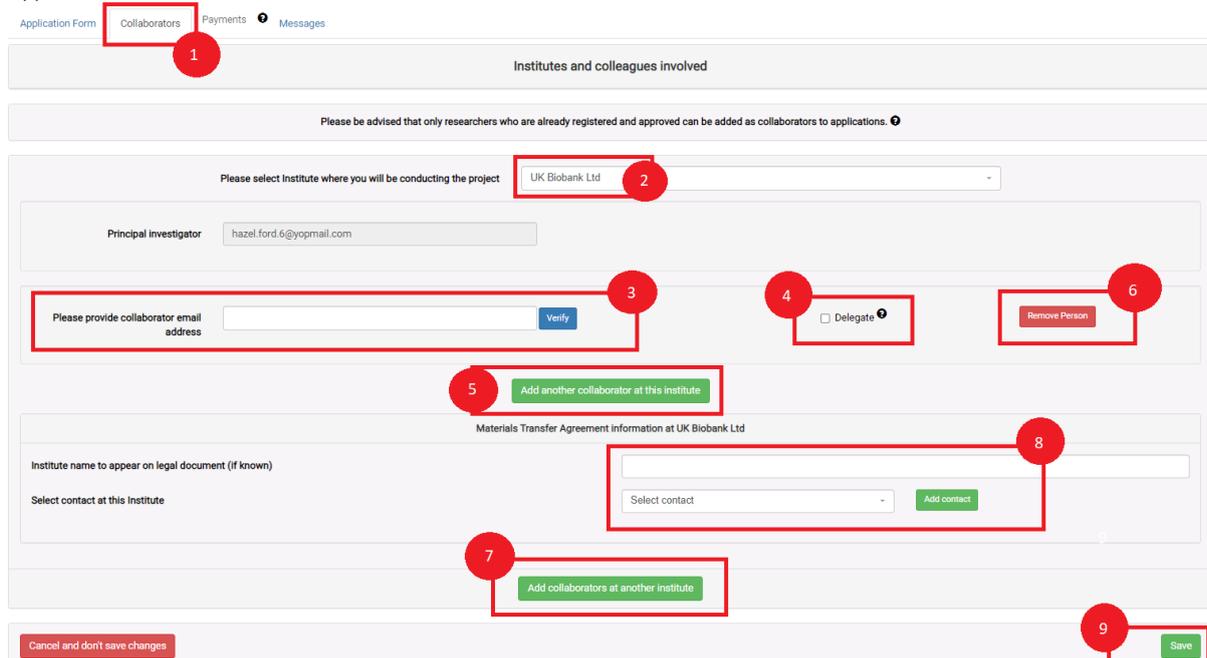
- Once your application is complete, you can submit by pressing the appropriate button at either the top or bottom of the screen. Alternatively, you can save your application as a draft to return to at a later date by pressing 'Save and continue later'. If you wish to abandon your application, you can do so by pressing 'Cancel' and changes will not be saved.

### 1.2 Adding collaborator and MTA contact details

- Once an application is saved you will be able to access the Collaborators tab where you can add other researchers and institutes involved in the research. You will also be able to provide delegate access to collaborator(s) who will be able to update the application on behalf of the Applicant PI.
- To populate the collaborators tab (see figure below):
  1. Click on the collaborators tab.
  2. Select the institute where you will conduct the majority of the research for this project, using the dropdown list provided (this will default to your primary institute, but can be changed if necessary):
  3. To add a collaborator from your institute, enter the collaborator's institute specific email address and click the verify button. If the collaborator has an approved UK Biobank registration you will see a green verification tick.
  4. Check the 'Delegate' box if you wish to give delegate rights to the collaborator. Collaborators with delegate rights are able to edit the application, make edits to the collaborator screen, make payments and download the data.
  5. Use the 'Add another collaborator at this institute' button to add additional collaborators at this institute. You should add all collaborators that will be working with UK Biobank data. Click 'Add another collaborator at this institute' to add the collaborator to your Application.

6. Incorrectly added collaborators can be removed by clicking the 'Remove' button next to their name.
7. To add collaborators at another institute, click the 'Add collaborators at another institute' button and enter the collaborator's institute specific email address and click the verify button. If the green verification tick does not appear it is because the collaborator has not yet registered (or approved) with UK Biobank. Please ask them to submit a registration; once they are an Approved Researcher you will be able to add them to your application.
8. You do not need to enter the legal name of your main institute or collaborating institutes at this stage as this information is contained in the Institute Details that are held in the AMS. You should use the 'Select a contact at this institute' dropdown list to add an MTA contact for each institute listed on your application. The MTA contact should be someone different to the PI/Lead Collaborator and should be authorised to sign legally binding documents on behalf of the institute.

Application ID: 117163



The screenshot shows the 'Collaborators' section of the application form. It includes a navigation bar with 'Collaborators' highlighted. The main section is titled 'Institutes and colleagues involved' and contains a warning message: 'Please be advised that only researchers who are already registered and approved can be added as collaborators to applications.' Below this is a dropdown menu for 'Please select Institute where you will be conducting the project' set to 'UK Biobank Ltd'. The 'Principal Investigator' field is filled with 'hazel.ford.6@yopmail.com'. A form for adding a collaborator has a 'Please provide collaborator email address' field with a 'Verify' button, a 'Delegate' checkbox, and a 'Remove Person' button. A green button 'Add another collaborator at this institute' is also present. The 'Materials Transfer Agreement information at UK Biobank Ltd' section has an 'Institute name to appear on legal document (if known)' field and a 'Select contact at this Institute' dropdown with an 'Add contact' button. At the bottom, there are 'Cancel and don't save changes' and 'Save' buttons.

- If the MTA contact you wish to add is not present in the dropdown list, you can add new MTA contact by clicking 'Add contact'.

Another screen will open (shown on next page) where you can complete the new MTA contact details. When you have finished click on the 'Add' button.

Add contact

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Contact Details

Title

First name

Last name

Email

Phone

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Address

Line 1

Line 2

Line 3

Line 4

Town/city

County/state

Postcode/ZIP

Country

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9. Click the 'save' button at the bottom of the 'Collaborators' page to submit collaborator information.

### 1.3 Selecting your pricing tier

1. When creating an application to access the UK Biobank Resource, the PI can select the pricing tier you want to access on the RAP. Please see the [Costs](#) page on our website to view a breakdown of the cost and datasets associated with the pricing tiers for the data-fields.
2. To select a pricing tier you must navigate to the 'Application' tab of your application and scroll down the page to Section B: 'Selection of data-fields'. Click the dropdown box next to 'Please select a data tier'.

B. Selection of data-fields	<a href="#">[Link to online help]</a>
<b>B1. Please select a data tier:</b> Information about pricing tiers can be found <a href="#">here</a> .	Select Tier ▾

3. If you wish to come back to the application at a later date, click 'Save and continue later'.

4. If you are ready to submit your application, check the box to confirm that the information provided in the application is full and correct, then click 'Submit'. You will be returned to your AMS home page.
5. It is recommended that researchers read the Terms and Conditions of the UK Biobank MTA which can be found within Annex II of our Access Procedures. These can be located via the hyperlink on this page or in the 'Resources' tab on the UK Biobank website ([www.ukbiobank.ac.uk](http://www.ukbiobank.ac.uk)).

#### **1.4 Amending an application**

The AMT will notify you via a Message in AMS if your application requires amendment.

- The application will be locked while a review is in progress. You will be able to view your application but will not be able to make amendments to the text or basket.
- When the AMT unlock your application, you will be able to amend the information within it.
- Once you have made the amendments ensure you click the 'Submit form' button. Please note that clicking the 'Submit form' button will re-lock your application.