

How to Create an Application using ProposalCentral

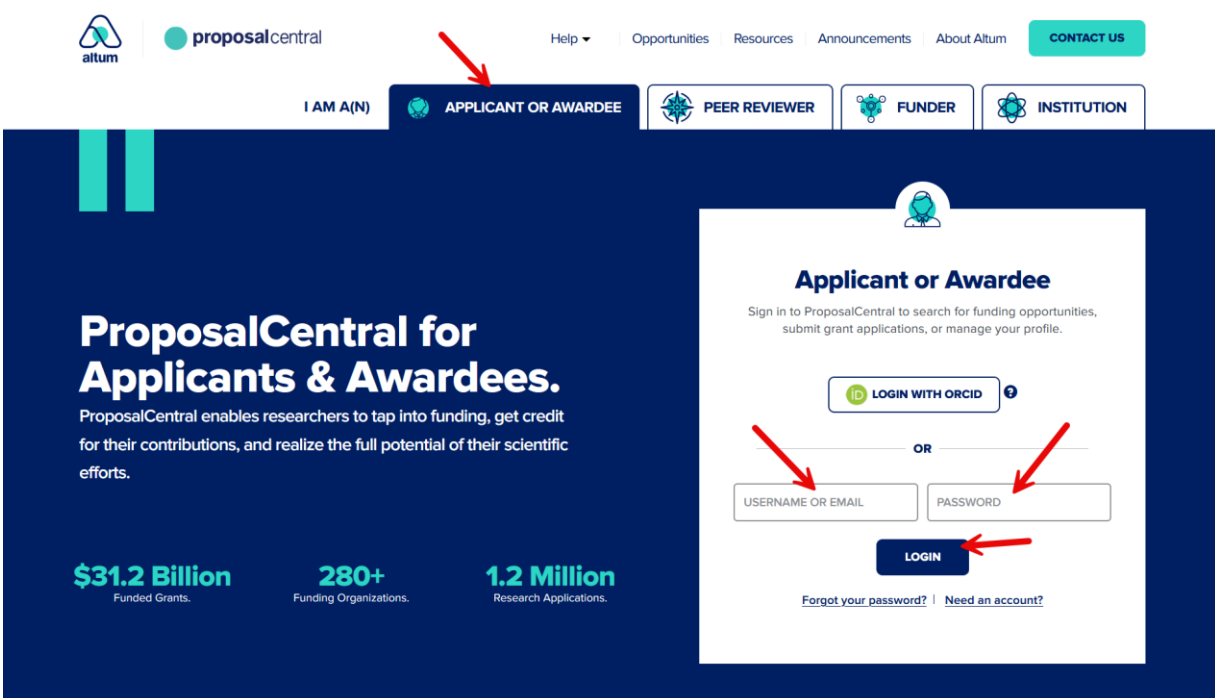
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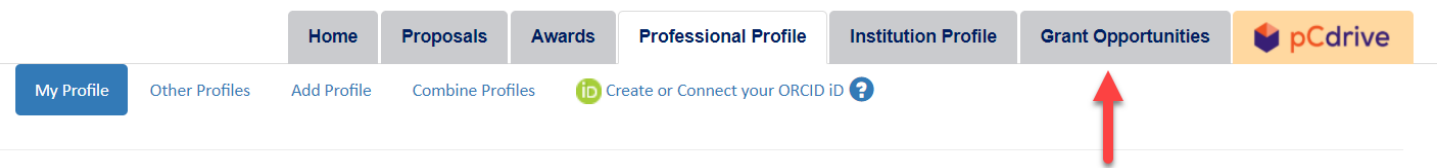
How to Start An Application

To start an application:

1. Go to <https://proposalcentral.com/> and login under the “Applicant or Awardee” section. If you do not have an account yet, please refer to the “How to Register as a ProposalCentral User” tutorial or click on the “Need an account?” link to create an account.



2. Click the gray Grant Opportunities tab in the upper right.



3. Select the grant maker you’re looking for from the drop-down menu at the top of the page and click the **Filter List by Grant Maker** button. All the opportunities available for the selected grant maker will show. You can:
 - a. Click the link in the Grant Maker column to open the grant maker’s website in a separate browser window or tab.
 - b. Click the link and/or download the document in the Program column to see program information supplied by the grant maker.

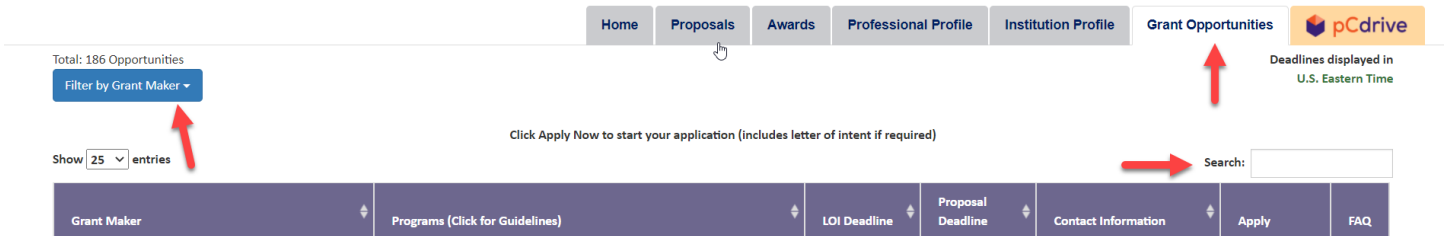
- c. See the deadlines for the LOI stage, if applicable, and the Proposal stage. **All deadlines are in US Eastern Time.** If a document icon is showing, you can click on it to download it. This includes necessary information about the deadline from the grant maker.
- d. Click the link or download the document in the Contact Information column. Clicking the link opens an e-mail to the program administrator. If a document is provided instead, it includes the grant maker contact information.
- e. If a document icon is showing in the FAQ column, you can click on it to download it. This includes information from the grant maker.

To start an application, click the “Apply Now” link. If there is an LOI stage, this starts the LOI. If there is no LOI stage, this starts a Proposal (aka Full Proposal).

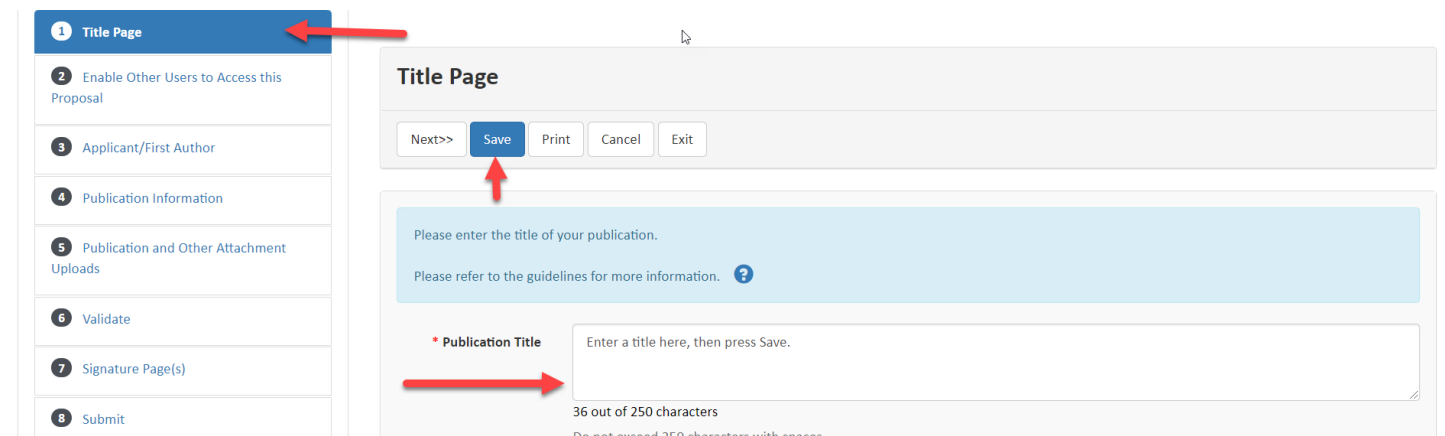


NOTE: If the program requires an LOI and the LOI deadline has passed, you are able to start the LOI but will not be able to submit it. You must contact the grant maker to get an LOI deadline extension. See 3d above for information on how to obtain the contact information for the program.

ProposalCentral Customer Support cannot provide deadline extensions; only the grant maker can.



4. Once the application has opened, enter a project title and click a **Save** button. The grant maker may refer to it as something other than “Project Title” specifically, but it is likely the very first field on the very first page.



5. You can now navigate to any section within the LOI/Full Proposal to review the information and add data and/or files.

Returning to In Progress Applications

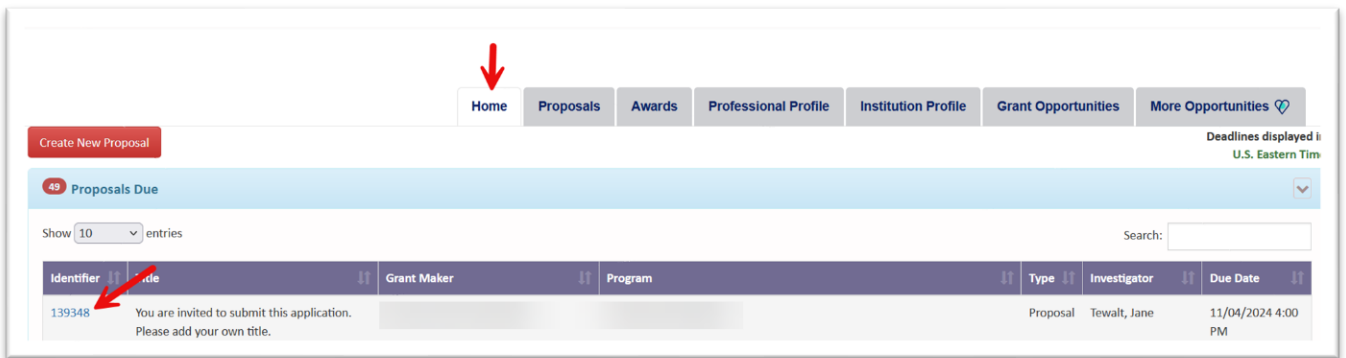
At any point you can exit your application by closing the application window. Make sure to click the **Save** button for the section **before** closing the window.

Return to the application by:

1. Going to <https://proposalcentral.com/>, logging in under the “Application Login” section, and clicking on the Proposals tab or the Home tab.



Delete	Edit	Identifier	Title	Grant Maker	Program	Investigator	Status	Due Date
	Edit	110051	Proposal: Kyle's Project LOI: Kyle's Project	Zee Test Grant Maker	Bertarelli MPA Program	Proposal: Jameson, Kyle LOI: Jameson, Kyle	Proposal: In Progress LOI: Approved	Proposal: 11/20/2020 11:59:00 PM LOI: 10/26/2020 10:15:00 AM

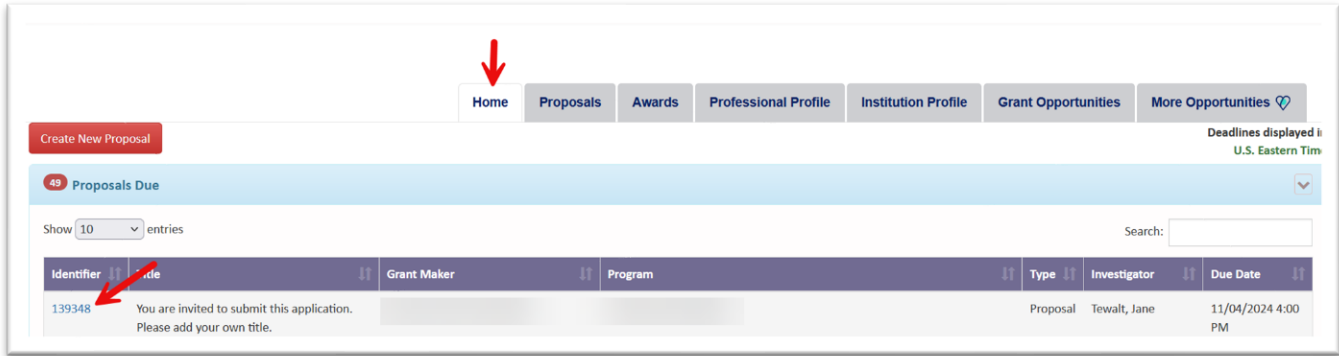


Identifier	Title	Grant Maker	Program	Type	Investigator	Due Date
139348	You are invited to submit this application. Please add your own title.			Proposal	Tewalt, Jane	11/04/2024 4:00 PM

2. Clicking the **Edit** button for the application found in the “In Progress” Proposal Status if you go to the Proposal via the Proposals tab. If you go to the Home tab, you may click on the Identifier to enter into the application.

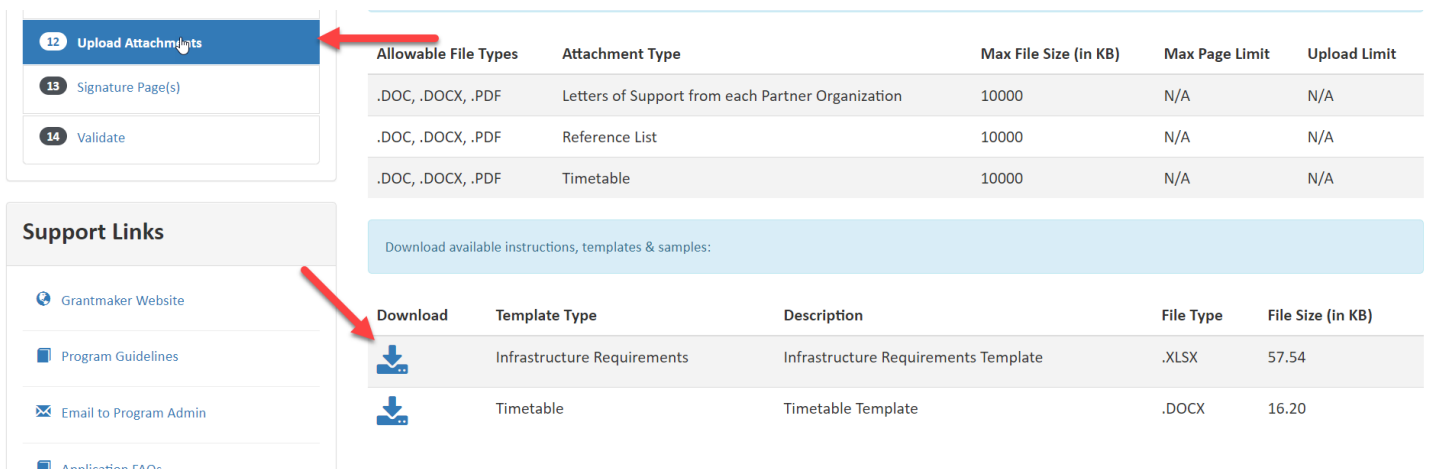


Delete	Edit	Identifier	Title	Grant Maker	Program	Investigator	Status	Due Date
	Edit	110051	Proposal: Kyle's Project LOI: Kyle's Project	Zee Test Grant Maker	Bertarelli MPA Program	Proposal: Jameson, Kyle LOI: Jameson, Kyle	Proposal: In Progress LOI: Approved	Proposal: 11/20/2020 11:59:00 PM LOI: 10/26/2020 10:15:00 AM





How to Download Templates and Instructions

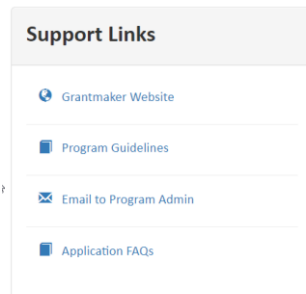
If the grant maker you are applying to has provided forms and instructions, you can download them in a section called “Download Templates & Instructions”. Click the link for this section in the gray menu on the left. To download a document, click the **Download** icon.



Allowable File Types	Attachment Type	Max File Size (in KB)	Max Page Limit	Upload Limit
.DOC, .DOCX, .PDF	Letters of Support from each Partner Organization	10000	N/A	N/A
.DOC, .DOCX, .PDF	Reference List	10000	N/A	N/A
.DOC, .DOCX, .PDF	Timetable	10000	N/A	N/A

Download	Template Type	Description	File Type	File Size (in KB)
	Infrastructure Requirements	Infrastructure Requirements Template	.XLSX	57.54
	Timetable	Timetable Template	.DOCX	16.20

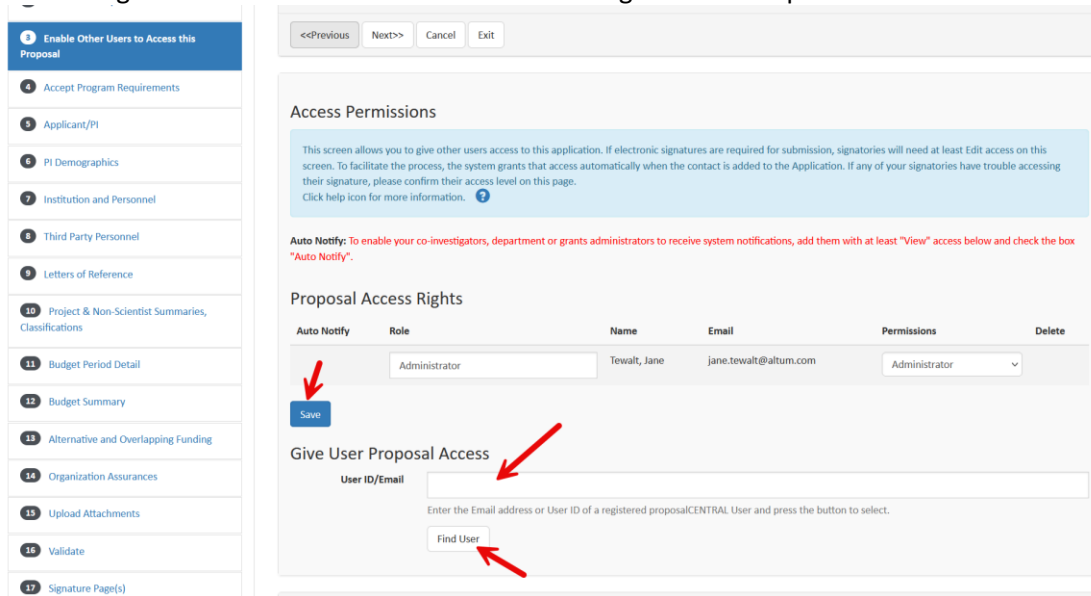
Additionally, in the gray menu on the left there is a section titled “Support Links”. The information in this section is the same as the information shown on the Grant Opportunities page described earlier.



How to Provide Other Users Access to the Application

Most likely, there are other individuals who you may want to have access to your application in order to help complete it or oversee/approve it. To grant other users access to your application, follow these steps:

1. Click the “Enable Other Users to Access this Proposal” link in the gray menu on the left.
2. At the bottom of the page, enter the e-mail address of the person and click the **Find User** button. Please note that the person **must** already have a ProposalCentral account. If they do not have a PC account, they can create an account using the instructions found in the “How to Register as a ProposalCentral User” tutorial.



1 Enable Other Users to Access this Proposal

2 Accept Program Requirements

3 Applicant/PI

4 PI Demographics

5 Institution and Personnel

6 Third Party Personnel

7 Letters of Reference

8 Project & Non-Scientist Summaries, Classifications

9 Budget Period Detail

10 Budget Summary

11 Alternative and Overlapping Funding

12 Organization Assurances

13 Upload Attachments

14 Validate

15 Signature Page(s)

<<Previous Next>> Cancel Exit

Access Permissions

This screen allows you to give other users access to this application. If electronic signatures are required for submission, signatories will need at least Edit access on this screen. To facilitate the process, the system grants that access automatically when the contact is added to the Application. If any of your signatories have trouble accessing their signature, please confirm their access level on this page. [Click help icon for more information.](#)

Auto Notify: To enable your co-investigators, department or grants administrators to receive system notifications, add them with at least "View" access below and check the box "Auto Notify".

Proposal Access Rights

Auto Notify	Role	Name	Email	Permissions	Delete
<input type="checkbox"/>	Administrator	Tewart, Jane	jane.tewart@altum.com	Administrator	

Save

Give User Proposal Access

User ID/Email

Enter the Email address or User ID of a registered proposalCENTRAL User and press the button to select.

Find User

3. You can enter a role for the person, if desired. Please note that the role included here is NOT connected to any roles listed for users on either the institution officials or key personnel pages. Additionally, select the desired permission level for the person and click the **Save** button. The permissions are as follows:
 - Administrator: The user can make any changes to the application, including granting other users access to the application.
 - Edit: The user can make any changes to the application. However, they cannot submit the application or grant other users access to the application (i.e. what you’re doing now) or see who has access.
 - View: The user can only see the application; they cannot make any changes.

If you want the person to receive the system notifications as well (e.g. application submission e-mail), check the box in the Auto Notify column and click the **Accept Changes** button.

Proposal Access Rights

Auto Notify	Role	Name	E-Mail	Permissions	Delete
<input type="checkbox"/>	<input type="text"/>	Jameson, Kyle	kyle.jameson@altum.com	Administrator	
<input type="checkbox"/>	<input type="text"/>	McKee, Kathy	kathy.mckee@altum.com	View	

Give User Proposal Access

User ID/E-Mail

Enter the E-Mail address or User ID of a registered proposalCENTRAL User and press the button to select.

4. To enable others to access the application, repeat steps 2-3.

If you need to remove a user's access to the application, click the trash can icon next to the desired user.

Proposal Access Rights

Auto Notify	Role	Name	E-Mail	Permissions	Delete
<input type="checkbox"/>	<input type="text"/>	Jameson, Kyle	kyle.jameson@altum.com	Administrator	
<input type="checkbox"/>	<input type="text"/>	McKee, Kathy	kathy.mckee@altum.com	View	

Give User Proposal Access

User ID/E-Mail

Enter the E-Mail address or User ID of a registered proposalCENTRAL User and press the button to select.

Alternatively, you can modify a user's access level by changing the permission level in the Permissions column and clicking the **Save** button.

Proposal Access Rights

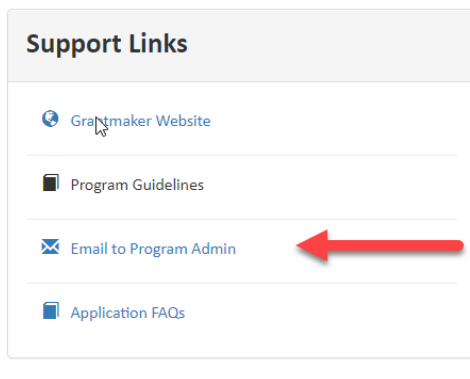
Auto Notify	Role	Name	E-Mail	Permissions	Delete
<input type="checkbox"/>	<input type="text"/>	Chernyakov, Stefanie	stefanie.chernyakov@altum.com	Administrator	
<input type="checkbox"/>	<input type="text"/>	Huddleston, Alex	alex.huddleston@altum.com	View	

Working in Various Application Sections:

ProposalCentral allows grant makers to create applications customized to their needs. Applications can look different between grant makers and even across programs within a grant maker. *Therefore, the application you're working on*

may look different than what is shown below. However, the general instructions regarding how features work still apply. When in doubt, you can contact:

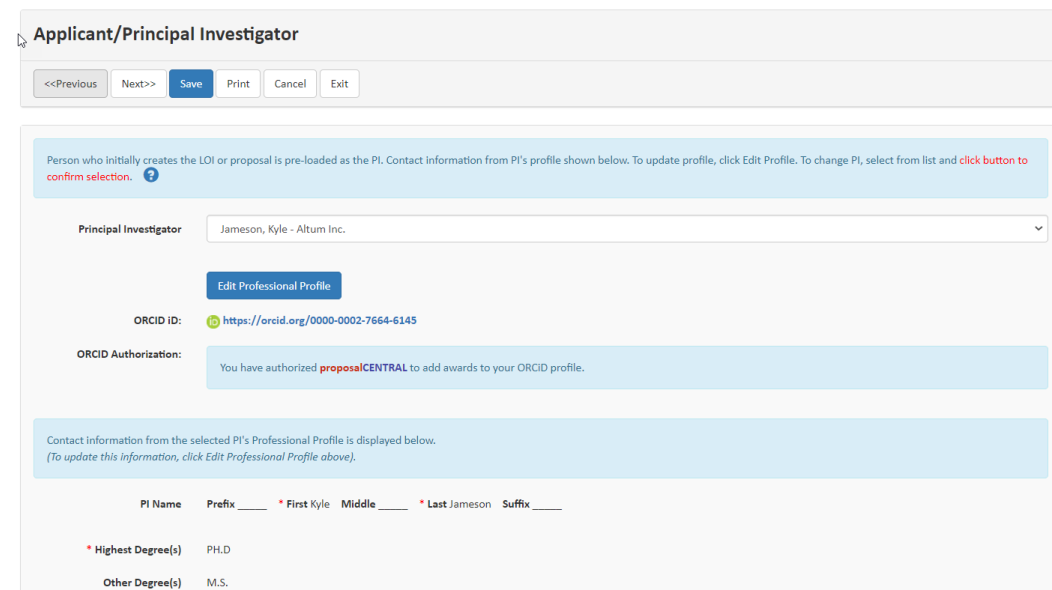
- The grant maker for questions regarding the expected type of information to provide. You can click the “Email to Program Admin” link found in the “Support Links” section of the gray menu on the right.



- Contact the ProposalCentral team for questions about “how” to do something. The Customer Support contact information is found on the top right of this tutorial.

Applicant Page

Most grant makers collect information about the PI/applicant in the application. Depending on the grant maker’s needs, instead of a PI/applicant, they may request information for a main contact or a director. Make sure to read the instructions the grant maker provided at the top of the page to understand which person they are requesting.

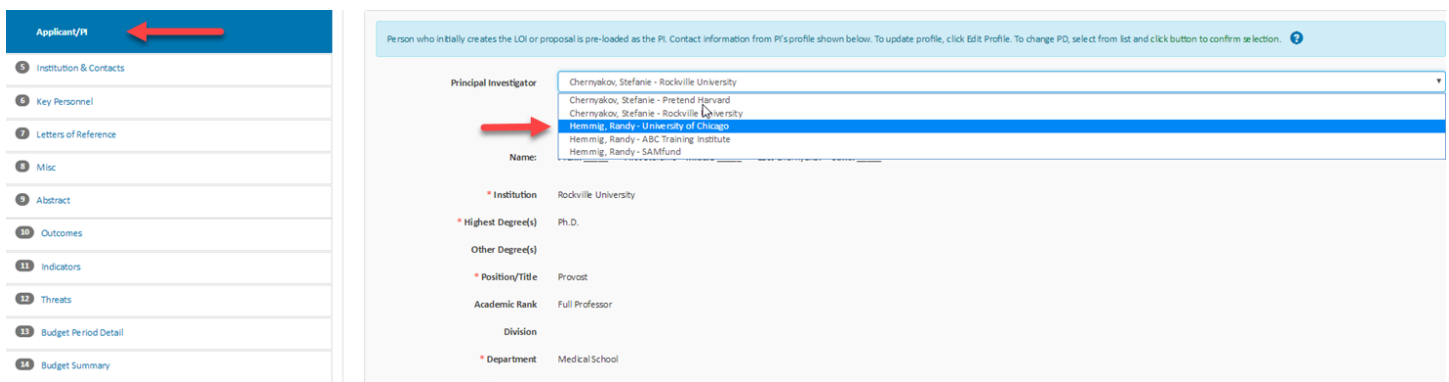


The screenshot shows the 'Applicant/Principal Investigator' form. At the top, there are navigation buttons: '<<Previous', 'Next>>', 'Save', 'Print', 'Cancel', and 'Exit'. Below this is a blue informational box: 'Person who initially creates the LOI or proposal is pre-loaded as the PI. Contact information from PI's profile shown below. To update profile, click Edit Profile. To change PI, select from list and click button to confirm selection.' The 'Principal Investigator' field is a dropdown menu showing 'Jameson, Kyle - Altum Inc.' with an 'Edit Professional Profile' button below it. The 'ORCID ID' field shows 'https://orcid.org/0000-0002-7664-6145'. Below that is an 'ORCID Authorization' box stating 'You have authorized proposalCENTRAL to add awards to your ORCID profile.' A second blue informational box says 'Contact information from the selected PI's Professional Profile is displayed below. (To update this information, click Edit Professional Profile above).' The form fields are: 'PI Name' with 'Prefix', '* First Kyle', 'Middle', '* Last Jameson', and 'Suffix' fields; '* Highest Degree(s)' with 'PH.D'; and 'Other Degree(s)' with 'M.S.'

Change Applicant

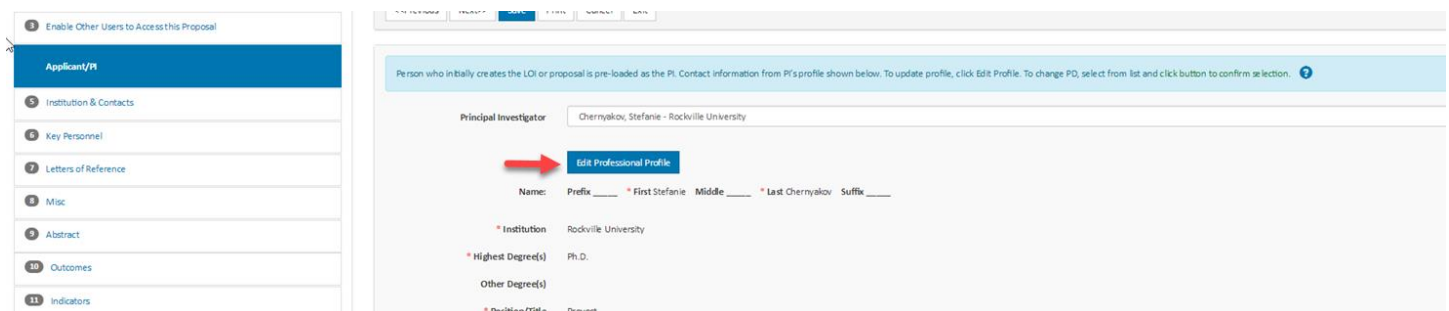
If the person listed in the drop-down menu is not the correct person, select the appropriate person from the drop-down menu and click the **Save** button. If the desired person is NOT listed in the drop-down menu, follow the instructions below:

1. The person who should be the applicant must have an account in ProposalCentral. If they have an account already, skip to the next step. If they do not have an account, they must create one. They can use the instructions found in the “How to Register as a ProposalCentral User” tutorial. Once the applicant has an account, you must provide “Administrator” access to the application in the “Enable Other Users to Access this Proposal” section. See the instructions for adding other users found in this tutorial.
2. Now that the applicant has access, they must:
 - a. Go to <https://proposalcentral.com/> and login below “Application Login”.
 - b. Click the blue Proposals tab and the “In Progress” link in the **Proposal Status** dropdown menu.
 - c. Click the **Edit** button next to the application.
 - d. Within the application, the applicant needs to go to the Applicant/PI section, select his/her name from the drop-down, and click the **Save** button.



Update Information Showing

If the contact information for the selected applicant is incorrect or incomplete, click the **Edit Professional Profile** button.



This directs you to the Professional Profile where you can update information. Make sure to click the **Save** button within the Professional Profile to retain any changes. Once done, click the **Return to LOI/Proposal** button.

Contents of Professional Profile [Help](#)

Click folders below to navigate to other parts of the profile.

- 1 Institution & Contact Info
- 2 Degrees
- 3 Research Interests
- 4 Personal Data for Applications
- 5 Biosketch
- 6 Other Support
- 7 Publications
- 8 Inventions

Return to LOI / Proposal Be sure to save changes to the profile before returning.

You can begin working on a proposal by clicking on the [Create New Proposal](#) link. We suggest that at a minimum you complete the contact information below. You do not need to complete the other sections of your profile. However, if a grantmaker requires additional information on a program for which you are submitting an application, you will have to return to your profile to complete their required sections. [Create New Proposal](#)

Name: Jameson, Kyle Email: kyle.jameson@altum.com [Edit Account Information](#)

[Save](#) [Cancel](#) [Next>>](#) [Delete This Contact Item](#)

Institution: Altum Inc. Primary Institution [Change Institution](#)

Institution Abbreviation:

Position Title: Title
Please provide your title at the institution e.g. Provost, Department Head, Vice President.

Academic Rank: Undergraduate
If Other is selected for Academic Rank, please enter the academic rank in the field provided.

After returning to the application, click the **Save** button within the application to have your application updated with the changes.

<<Previous [Next>>](#) **Save** [Print](#) [Cancel](#) [Exit](#)

PLEASE NOTE: If you have added or changed your institution affiliation in your professional profile, you must select the appropriate institution from the Principal Investigator drop-down list.

Person who initially creates the LOI or proposal is pre-loaded as the PI. Contact information from PI's profile shown below. To update profile, click [Edit Profile](#). To change PD, select from list and click button to confirm selection. [?](#)

Principal Investigator: Chernyakov, Stefanie - Rockville University

[Edit Professional Profile](#)

Name: Prefix ____ * First Stefanie Middle ____ * Last Chernyakov Suffix ____

* Institution: Rockville University

* Highest Degree(s): Ph.D.

If you do not have the **Edit Professional Profile** button, it means you do not have access to the applicant's Professional Profile. Please note that this is different than having access to the application. If the applicant wants you to update his/her Professional Profile, the applicant must give either "Administrator" or "Edit" privileges to his/her Professional Profile. They can use the instructions found in the "How to Register as a ProposalCentral user" tutorial.

Once the applicant has granted you either "Administrator" or "Edit" privileges to his/her Professional Profile, you can follow the instructions found in the beginning of this section.

Institution Page

Most grant makers collect information about the institution in the application. Make sure to read the instructions the grant maker provided at the top of the page. By default, the Primary Institution listed for the person who started the application is the institution listed.

Institution & Contacts

<<Previous Next>> **Save** Print Cancel Exit

Main Institution

Institution Name	Altum Inc.
Select Institution	Change Institution Note: Changing institution will delete currently displayed contacts.
Institution Address	
* Address	6707 Democracy Blvd. Suite 104
* City	Bethesda
State	MD
* Zip	20817
* Country	United States

Edit Institution Profile

Save

Note: Click Save before completing the sections below.

Change Institution

To change the institution:

1. Click the **Change Institution** button.

Institution & Contacts

<<Previous Next>> **Save** Print Cancel Exit

Main Institution

Institution Name Altum Inc.

Select Institution **Change Institution** Note: Changing institution will delete currently displayed contacts.

Institution Address

- * **Address** 6707 Democracy Blvd.
Suite 104
- * **City** Bethesda
- State** MD
- * **Zip** 20817
- * **Country** United States

Edit Institution Profile

Save

Note: Click Save before completing the sections below.

2. Enter a partial name search for your organization and click the **Display Results** button.

Home Proposals Awards Professional Profile Institution Profile Grant Opportunities pCdrive

Institution Name (partial):
A maximum of 100 results will be returned based on the search text.

Institution City:
Enter entire city name.

Institution State:

Institution Country:

Display Results Reset Filter Cancel



TIP: Make sure to include a key word from your organization’s name, but not the complete name. For example, if your organization is “The University of America in DC”, search for “University of America”.

3. If:
- a. **Your institution is listed**, select it by clicking the radio select in the left column and click the **Select** button at the bottom.

Select	Institution Name	Institution Status
<input type="radio"/>	Rockville University	Confirmed

Select Cancel

- b. **Your institution is NOT listed**, see the “How to Register your Institution with ProposalCentral” instructions for information on how to create a new Institution Profile.
- 4. After selecting the appropriate Institution Profile (3a above), you are returned to your application. Click the **Save** button within the application to retain your changes.

Update Information Showing

Only people with access to the institution’s profile can update it. If you see an **Edit Institution Profile**, you can edit the Institution Profile by clicking that button. Once you’ve clicked the **Edit Institution Profile** button, you are directed to the Institution Profile information where you can update information. Make sure to click the **Save** button within the Institution Profile to retain any changes. Once complete, click the **Return to LOI/Proposal** button.

When you have returned to the application, click the **Save** button within the application to have your application updated with the changes.

Institution & Contacts

<<Previous Next>> **Save** Print Cancel Exit

Pf's institution is pre-loaded as Lead Institution. To change, select from list below or Search all registered institutions. Press button to confirm selection. Click Edit Profile button to change institution information

Change Lead Institution Rockville University

Click this button to Change the Lead Institution **Change Institution** Note: Changing institution will delete currently displayed contacts.

Division

Department

Address

* Street 111 Main Street

* City Bethesda

State/Province MD

Below the information about the institution is the name, e-mail, and phone number of the person at your institution who created the profile and should have access to update it. Contact that person to have them make the necessary changes. If that person is no longer at your institution, contact Customer Support (pcsupport@altum.com) to find out if there are other individuals at your institution who can update the institution profile.

Click this button to Change the Lead Institution **Change Institution** Note: Changing institution will delete currently displayed contacts.

Address

* Street 20410 Century Boulevard
Suite 230A

* City Germantown

State/Province MD

* Zip/Postal Code 20874

* Country United States

Phone (301)916-4557

Fax (301)916-7024


Checks Payable To: Research and Management Systems, Inc.

required institution information is missing or appears to be incorrect, please contact the following individual(s). They have access to the institution profile and can make the necessary updates.

Contact	Email	Phone
McKee, James	jmckee@ramscopany.com	(301)916-4557 x224
Miller, Brad	bradmiller123@example.com	703-964-5863

Adding Institution Contacts

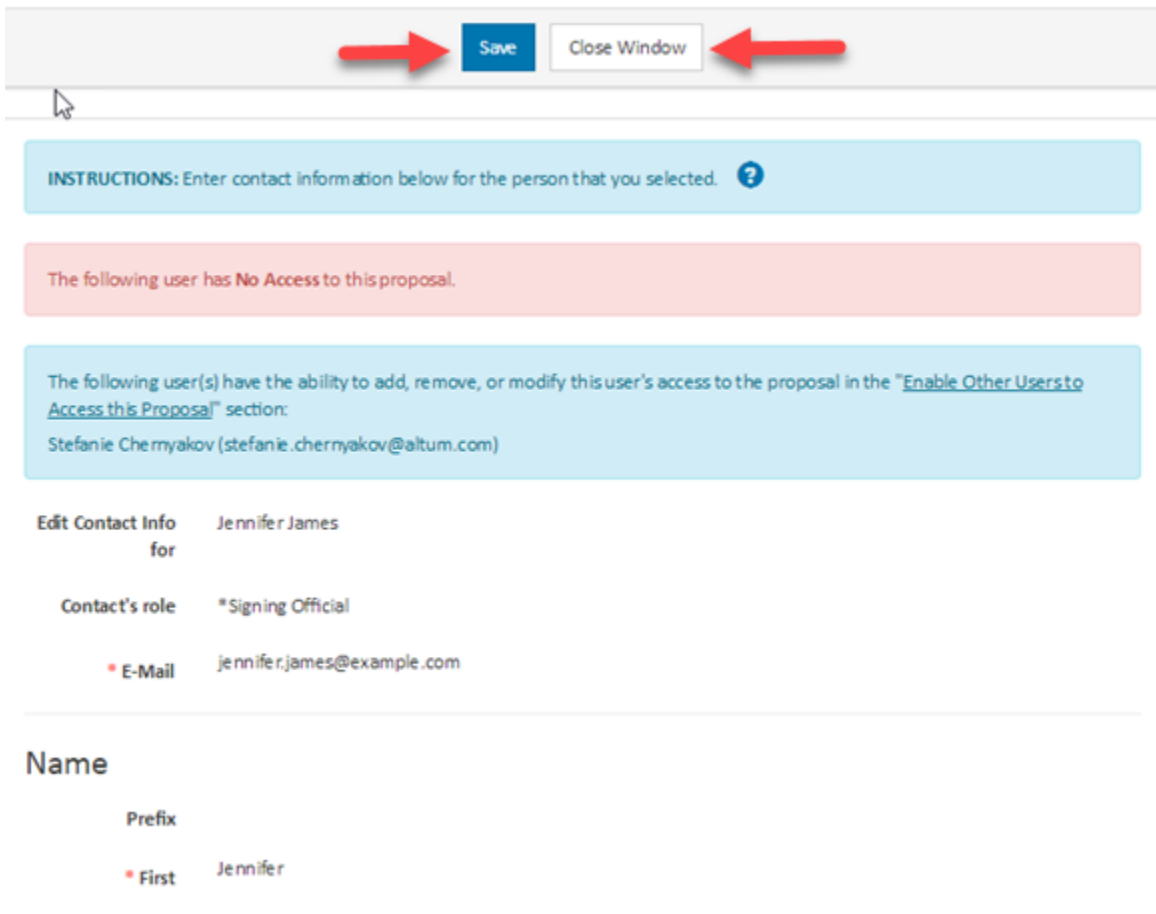
Some grant makers collect information about institution officials. If so, the institution's official roles requested display at the bottom. Those that are required for submission are indicated with an asterisk (*). If the Institution Profile that was selected as the institution for the application has officials added to the profile, those individuals display in the drop-down menu for each role. You can select the appropriate person and click the **Add** button. If the appropriate person is not listed in the drop-down menu, you can add their e-mail twice and click the **Add** button.

The table below lists requested contacts (* indicates required contact). Select from the list of officials supplied with the institution's profile and click the "Add" button. If the contact is not in the list, enter the contact's e-mail address and click the "Add" button. 

*Signing Official	Select from list of Institution Officials ▾ OR
Enter email address	Select from list of Institution Officials Alex Chem - Signing Official Jennifer James - Financial Officer
Confirm email address	
	Add
*Fiscal Officer	Select from list of Institution Officials ▾ OR
Enter email address	
Confirm email address	
	Add

Regardless of which method you used to add the institution official, a new window opens with the person you selected/entered. If the person you selected/entered:

- **Already has an account in ProposalCentral**, the contact information from their Professional Profile displays. You can update the text showing and click the **Save** button. Any information you change here does NOT change the information in the person's profile, only in the application. When done working with the contact, click the "Close Window" link.
- **Does not have an account in ProposalCentral**, you need to supply the contact information for the user. When the **Save** button is clicked, an account is automatically created for the person with the contact information supplied. When done working with the contact, click the "Close Window" button.



NOTE: When you add an institution official on this page, it does NOT give the person access to the application unless they are a role that requires a signature within the application. If you want the person to have access to the application, you must provide it on the “Enable Other Users to Access this Proposal” section.

After the person is added, if you need to edit the contact information included, click the “Edit” link next to their name. You are returned to the contact page where you can make changes. Click the **Save** button to retain your changes and the “Close Window” button to complete the step.

Note: Click Save before completing the sections below.

The table below lists requested contacts (* indicates required contact). Select from the list of officials supplied with the institution's profile and click the "Add" button. If the contact is not in the list, enter the contact's email address and click the "Add" button.

Role	Name	Title	Institution	Email	Phone	
*Signing Official	James, Jennifer	Provost	Rodville University	jennifer.james@example.com	301-777-5555	 

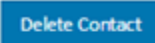
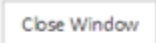
If you selected the wrong person and need to change it, click the trash can icon.

The table below lists requested contacts (* indicates required contact). Select from the list of officials supplied with the institution's profile and click the "Add" button. If the contact is not in the list, enter the contact's email address and click the "Add" button. ?

Role	Name	Title	Institution	Email	Phone	
*Signing Official	James, Jennifer	Provost	Rockville University	jennifer.james@example.com	301-777-5555	 

The same pop-up window appears. Within the window, click the **Delete Contact** button.

Contact Screen - Institution & Contacts

INSTRUCTIONS: Enter contact information below for the person that you selected. ?

The following user has **No Access** to this proposal.

The following user(s) have the ability to add, remove, or modify this user's access to the proposal in the "[Enable Other Users to Access this Proposal](#)" section:
Stefanie Chernyakov (stefanie.chernyakov@altum.com)

View Contact Info for Jennifer James


Contact's role *Signing Official

E-Mail jennifer.james@example.com

After the deletion is confirmed, click the "Close Window" link.

Key Personnel (aka Project Personnel)

Most grant makers collect information about project personnel in the application. Make sure to read the instructions the grant maker provided at the top of the page.


Provide professional information for all members of the project other than the PI. 

Role	Name	Title	Institution	Email	Phone	Effort	Actions
No Personnel Currently Identified							

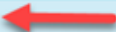
Enter and confirm the email address of the key personnel. Once added, a pop up box will appear. Please complete the details for each individual listed in this section.

* Enter email address

* Confirm email address



To add the requested individuals, enter the e-mail address twice and click the **Add** icon.


Provide professional information for all members of the project other than the PI. 

Role	Name	Title	Institution	Email	Phone	Effort	Actions
No Personnel Currently Identified							

Enter and confirm the email address of the key personnel. Once added, a pop up box will appear. Please complete the details for each individual listed in this section.

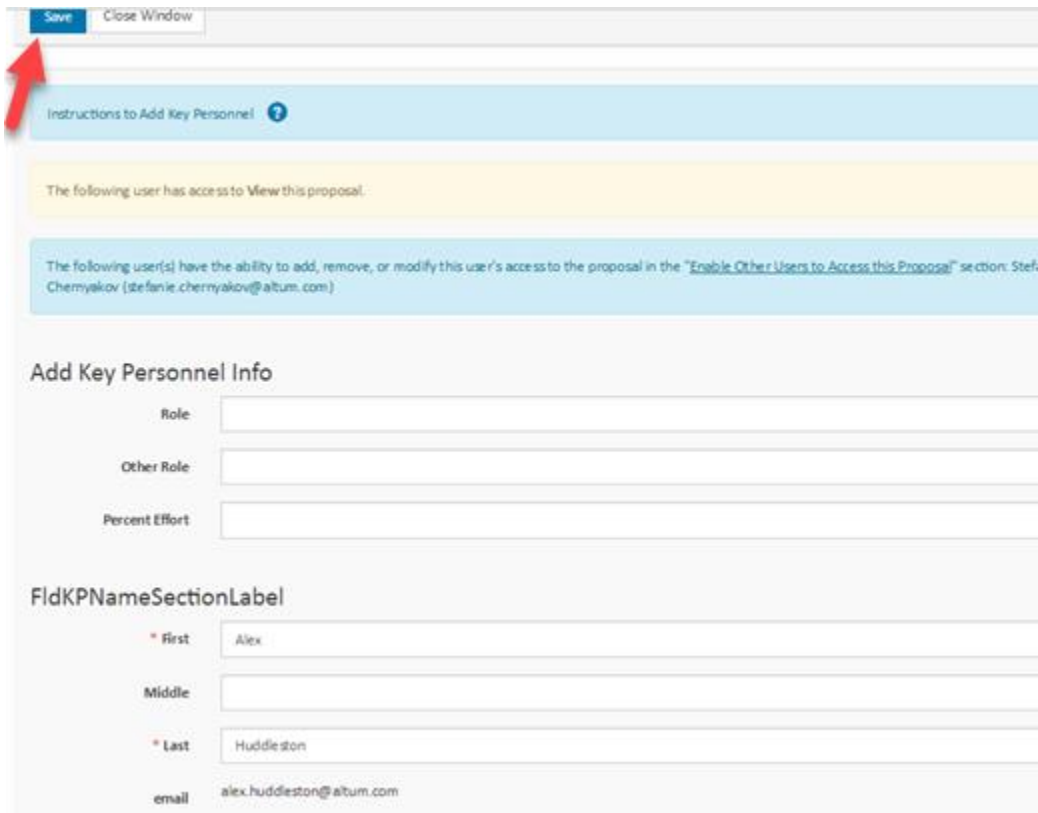
* Enter email address

* Confirm email address





A new window displays with the person you entered. If the person entered:

- **Already has an account in ProposalCentral**, the contact information from their Professional Profile shows. You can update the text and click the **Save** button. Any information changed here does NOT change the information in the person's profile, only in the application. Also, if the grant maker requested a "role" for the person, make sure to select/enter the information. If a role drop-down menu is supplied, users with an asterisk (*) must be added in order to submit an application. When done working with the contact, click the "Close Window" link.
- **Does not have an account in ProposalCentral**, you will need to supply the contact information for the user. Clicking the **Save** button, automatically creates an account for the person with the contact information supplied. Also, if the grant maker requested a "role" for the person, make sure to select/enter the information. If a role drop-down menu is supplied, users with an asterisk (*) must be added in order to submit an application. When done working with the contact, click the "Close Window" link.






NOTE: When you add a person on this page, it does NOT give the person access to the application. If you want the person to have access to the application, provide it on the “Enable Other Users to Access this Proposal” section.

After the person has been added, if you need to edit the contact information included, click the edit icon next to their name. You are returned to the contact page where you can make changes. Click the **Save** button to retain your changes and the “Close Window” link to complete the step.

Role	Name	Title	Institution	Email	Phone	Effort	Actions
	Huddleston, Alex	Department Head	University of California, Irvine	alex.huddleston@altum.com	111-222-3333		 

If you need to remove the person, click the delete icon.

Role	Name	Title	Institution	Email	Phone	Effort	Actions
	Huddleston, Alex	Department Head	University of California, Irvine	alex.huddleston@altum.com	111-222-3333		 

If Demographics are required for a Key Personnel role the below icon will be visible to the Key Personnel only. They will need to click on the Icon/or similar in the same location as shown below to enter their Demographic information.

- 2 Third Party Personnel
- 9 Project & Non-Scientist Summaries, Classifications
- 10 Budget Period Detail
- 11 Budget Summary
- 12 Organization Assurances
- 13 Upload Attachments
- 14 Validate
- 15 Signature Page(s)
- 16 Submit

CoPI Update

- As of 2/1/2022, the Initiating PI should no longer add themselves as a CoPI, the system will automatically count you as a CoPI. If you added yourself, please delete yourself from this section listed below and re-upload the Initiating CoPI documents in the Upload Attachments section.

The application cannot be submitted without the supporting documentation, so you should notify third parties of your deadline for submitting the application.

Third Party Personnel requirements are as follows:

- **Visiting International Scholar Co-PI:** Minimum 1; Maximum 1 (Required)
- **U.S.-based Co-PI: Department Head:** Minimum 1; Maximum 1 (Required)

US-based Co-PI	Tewalt, Jane	Research Assistant Professor	Altum Inc.	jane.tewalt@altum.com	123-456-7891		
Role	Name	Title	Institution	Email	Phone	Effort	Actions
Visiting International Scholar Co-PI	Tewalt, Jane	Research Assistant Professor	Altum Inc.	jane.tewalt@altum.com	123-456-7891		   

Organizational Assurances

Some grant makers collect organization assurances/certifications from applicants (e.g. IRB, IACUC, rDNA). Make sure to read the instructions provided by the grant maker.

Human Subjects +

* Does the proposed project involve Human Subjects? Yes No

If Yes, Status of IRB Approval Approved Pending Exempt Not Applicable

Approved or Pending Date (mm/dd/yyyy)

If Exempt, Type

Human Subjects Assurance Number (DHRP) This assurance number cannot be entered on this screen – it will appear only if properly entered in the institution profile (for the institution you selected in the institution section) them add the assurance numbers to the institution profile. If you need assistance, contact proposalCENTRAL customer support.

Human Subjects Assurance Date This assurance date cannot be entered on this screen – it will appear only if properly entered in the institution profile.

Vertebrate Animals +

* Does the proposed project involve Vertebrate Animals? Yes No

If Yes, status of IACUC approval Approved Pending Exempt Not Applicable

Approved or Pending Date (mm/dd/yyyy)

Animal Welfare Assurance Number (OLAW) This assurance number cannot be entered on this screen – it will appear only if properly entered in the institution profile (for the institution you selected in the institution section) them add the assurance numbers to the institution profile. If you need assistance, contact proposalCENTRAL customer support.

AWAN Date This assurance date cannot be entered on this screen – it will appear only if properly entered in the institution profile.

AAALAC Accreditation Date This assurance date cannot be entered on this screen – it will appear only if properly entered in the institution profile.

USDA Inspection Date (MM/DD/YYYY) This assurance date cannot be entered on this screen – it will appear only if properly entered in the institution profile.

Recombinant DNA

* Does the Proposed project involve Recombinant DNA? Yes No

If required to enter either an OHRP (for IRB) or OLAW (for IACUC) number, this must come from the Institution Profile. If it's missing (or incorrect), the institution profile must be updated to include this information. Only people with access to the lead institution's profile can update it. To find out who this person is, go to the section of your application that collected the name of the lead institution. The name of this section could be anything but is typically referred to as something along the lines of "Organization/Institution" and is typically found in the gray menu on the left after the page that collected the name of the PI/applicant. Below the information about the institution is the name, e-mail, and phone number of the person at your institution who created the profile and should have access to update it.

If that person is no longer at your institution, contact Customer Support (pcsupport@altum.com) to find out if there are other individuals at your institution who can update the institution profile.

Other Support

There is a tutorial dedicated to Other Support. Please see the "How to Add Other Support" tutorial.

Publications

There is a tutorial dedicated to Publications. Please see the "How to Add Publications" tutorial.

PI Data Sheet (aka demographic data)

Only the PI may fill this information out. The tab to fill out the PI Demographics is only visible to the PI and those who have access to the PI's profile.

If you did not have the **Edit Professional Profile** button, you do not have access to the Applicant's Professional Profile. Please note that this is different than having access to the application. If the applicant wants you to update his/her Professional Profile, the applicant must give you either "Administrator" or "Edit" privileges to his/her Professional Profile. Applicants can use the instructions found in the "How to Register as a ProposalCentral User" tutorial.

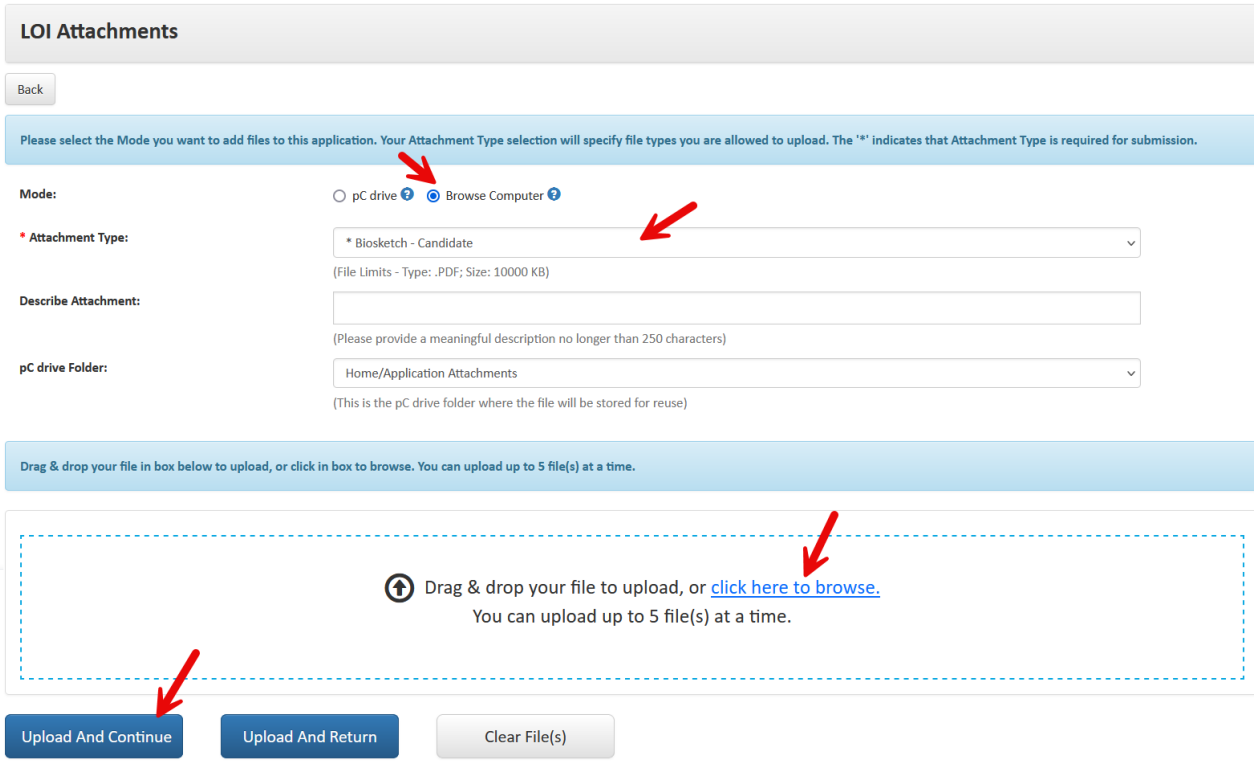
Once the applicant has granted either "Administrator" or "Edit" privileges to his/her Professional Profile, you can follow the instructions found in the beginning of this "PI Data Sheet" tab in the application.

Upload Documents

Most grant makers include a section in the application to collect files from the applicant. To upload a document in this section:

1. Click the Attach Files button.
2. Select the attachment type.
3. Provide a description.

4. Drag the file or click to browse and upload the attachment.
5. Click on Upload and Continue.
6. You may ignore the pC Drive radio button as this is a feature that is no longer offered.



LOI Attachments

Back

Please select the Mode you want to add files to this application. Your Attachment Type selection will specify file types you are allowed to upload. The "*" indicates that Attachment Type is required for submission.

Mode: pC drive Browse Computer

* Attachment Type: * Biosketch - Candidate
(File Limits - Type: .PDF; Size: 10000 KB)

Describe Attachment:
(Please provide a meaningful description no longer than 250 characters)

pC drive Folder: Home/Application Attachments
(This is the pC drive folder where the file will be stored for reuse)

Drag & drop your file in box below to upload, or click in box to browse. You can upload up to 5 file(s) at a time.

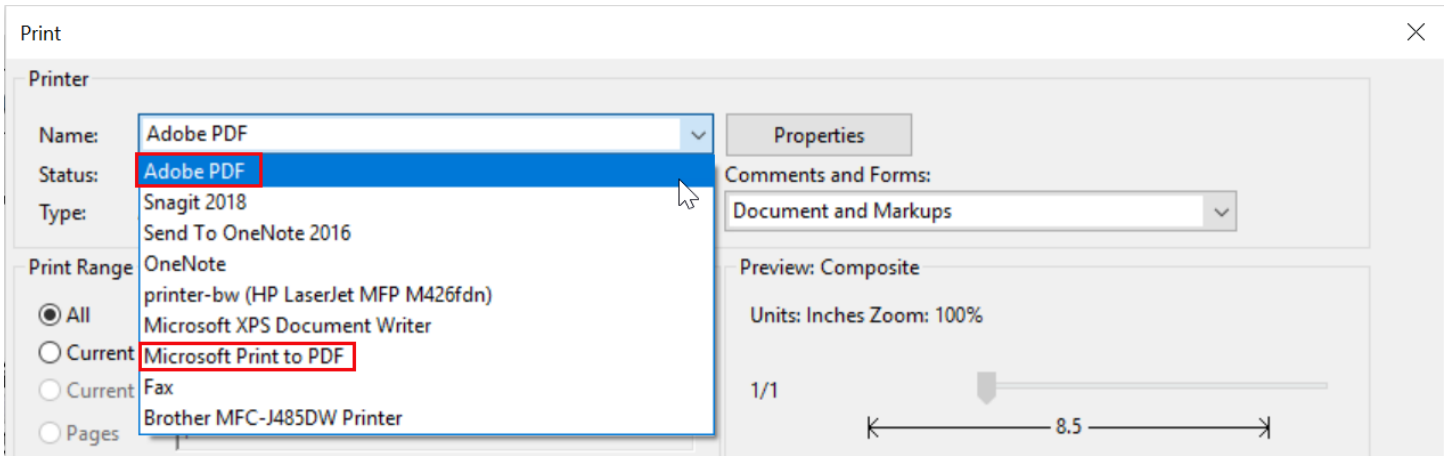
Drag & drop your file to upload, or [click here to browse](#).
You can upload up to 5 file(s) at a time.

Upload And Continue Upload And Return Clear File(s)

If there was an error with the file, it MAY show as red in the list of uploaded attachments. Examples of issues that cause errors with files are password protection and file corruption. Please note that not every issue with a file can be identified during the upload process and show as red. Use the PDF application feature to make sure that all Word and PDF files uploaded are included. The absence of a file MAY indicate that there was an error. Again, refer to the PDF Application section for information.

To replace a "bad" file:

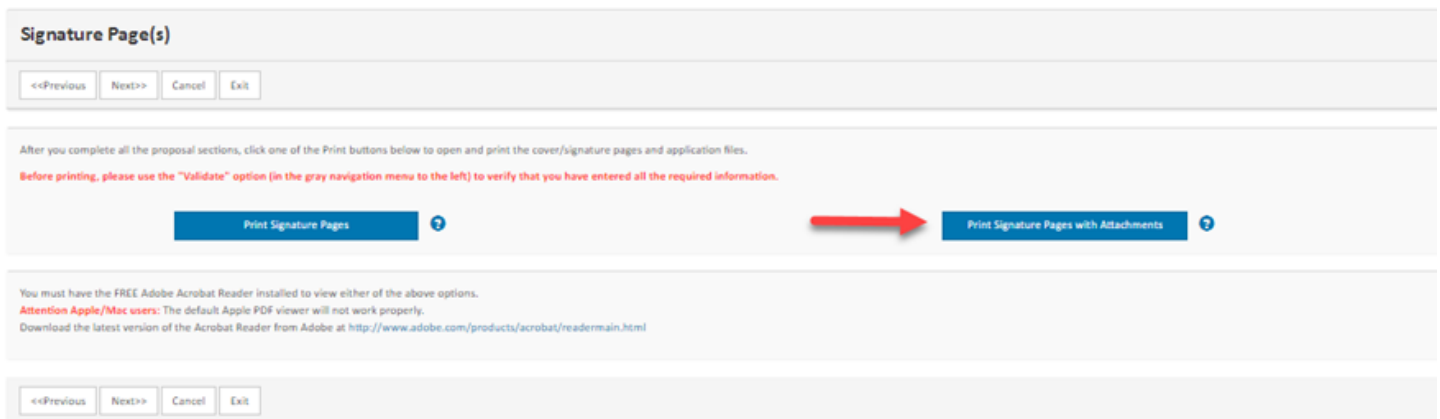
1. Click the trash can icon next to the file to replace.
2. You are prompted to confirm you want to proceed with deleting that file, click the **Yes** button.
3. Open the original file from your computer using either Adobe Professional or Adobe Reader. When you print the file, select the respective .pdf converter tool from the printer dialog box "Name" drop-down menu and click the **Print** button. Save the new file that is created. Please be sure to rename the file when prompted. The new name should be something that the file has not been named before.



- Return to the application section where you previously uploaded the files. Repeat the steps at the beginning of this section regarding uploading a file.

PDF of Application

The application includes a section that looks like the following screenshot. The name of the section could be anything but is typically referred to as “Signature Page(s)” or something similar. It is located between the Validate and Submit sections in the gray menu on the left. Clicking the **Print Signature Pages with Attachments** button on the right generates a PDF that includes several standard templates (e.g. signature page, contacts, abstracts), followed by all Word and PDF documents that you uploaded.



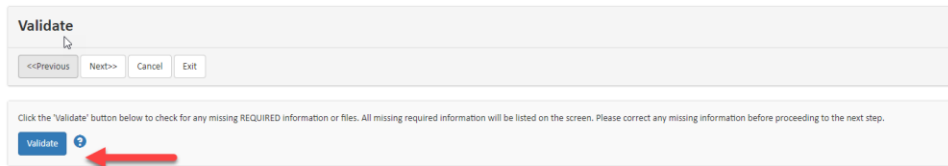
Some grant makers require the applicant to print the signature page, have it signed, and upload it in the section described earlier. Make sure to refer to the grant maker’s Program Guidelines for information on required attachments.

When you click the **Print Signature Pages with Attachments** button, make sure that all Word and PDF attachments included are showing. If not, there are a few reasons why:

1. The grant maker may intentionally exclude certain attachment types from this function. To see if your grant maker has chosen to do this, refer to the policies and guidelines they supplied (Program Guidelines link or attachment found in the Support Links section of the gray menu on the right). If the grant maker has not mentioned this in their policies and guidelines, proceed to #2.
2. There may be an error with the file you uploaded. The two most common errors are corrupted or password protected files. The way to fix this is to remove the file that has errors, regenerate the PDF, and upload again.
3. If # 1 did not apply to your situation and #2 did not resolve the issue, contact pcsupport@altum.com for assistance.

How to Validate the Application

Every application has a section called “Validate”. Clicking the **Validate** button runs a check of your application and lets you know if there is required data and/or files missing.



If you are missing information, both the missing item and the section where it can be found are listed. Clicking the link redirects to the section where the missing item is found.

Proposal: Enter a title here, then press Save.

Listed below are fields/components within your application that have not yet been completed. Click on the blue links provided to take you to the page where they are located.

[Applicant/First Author Errors](#)

Phone:

An entry in Mobile: is required.

An entry in Date of Birth is required.

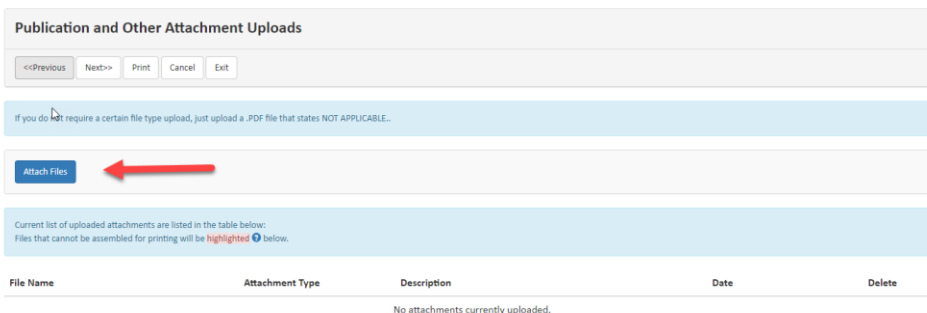
[Missing Attachments:](#)

The Attachment Type: Publication is required but not present.

The Attachment Type: Signed Application Form (Signed Page Only) is required but not present.

The Attachment Type: Accompanying letter for articles with "in press" status (if applicable) is required but not present.

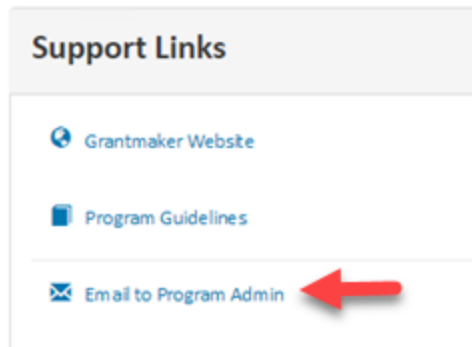
The Attachment Type: Letter from future employer attesting applicants return to Switzerland in case applicant is abroad during time of submission (if applicable) is required but not present.



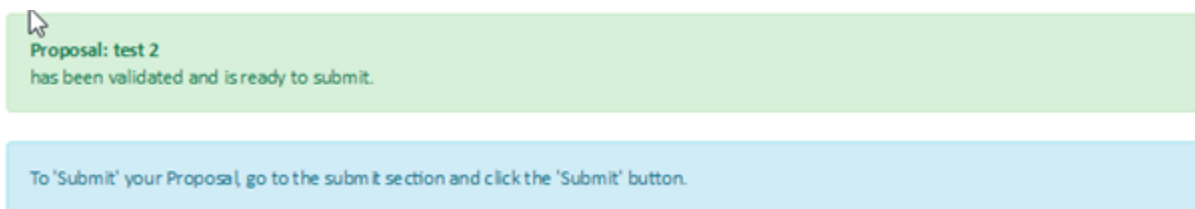
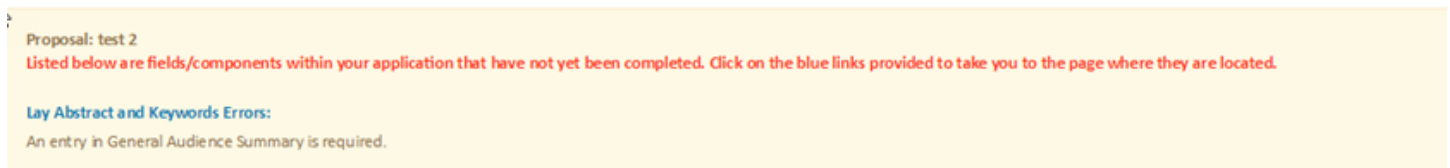
Validate the application as many times as you like. If you validate the application and nothing is missing, the system does **not** automatically submit it for you. **You must go to the “Submit” page in order to submit the application.**

How to Submit the Application

Every application has a section called “Submit”. You must have Administrator level access to the application in order to be able to submit. You will not see the Submit tab if you do not have Administrator level access to the application. If the deadline for your application has passed, the Submit tab does NOT display. **ProposalCentral Customer Support cannot provide deadline extensions; only the grant maker can.** To request a deadline extension, contact the grant maker by clicking the Email to Program Admin link found in the “Support Links” section of the gray menu on the right.



When ready to submit your application, click the **Submit** button. Before submission, the system automatically runs a check of the application to make sure no required data and/or files are missing. If there are any missing requirements, an error message returns indicating what information needs to be supplied before you can submit.



If all required information is provided, the application is submitted. A confirmation message shows on the screen and an e-mail is sent to the applicant and any other users listed on the “Enable Other Users to Access this Proposal” with a check in the “Auto Notify” column.

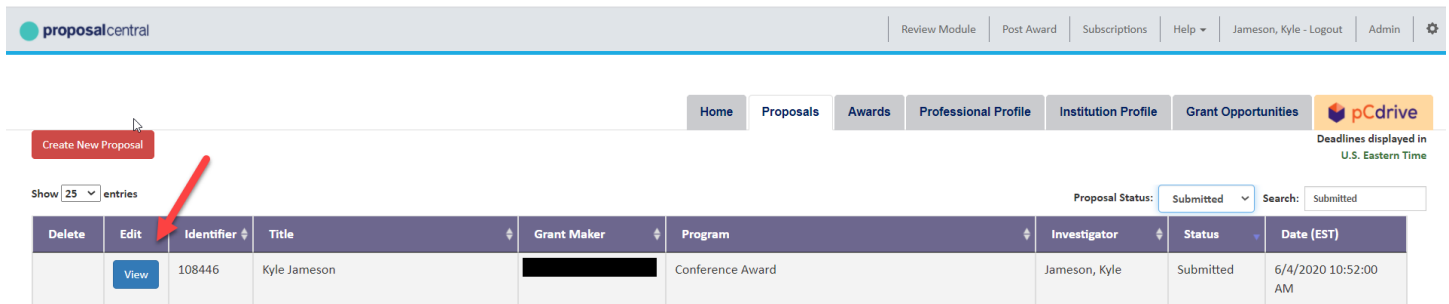
An email has been sent to the Principal Investigator at stefanie.chemyakov@altum.com. If this email has not been received within the next ten minutes, please contact Customer Service for assistance. The Confirmation Email is considered the only valid proof of submission should any questions arise at a later date.

Important Notice:
 We recommend that you verify that the status of your application has changed to 'Submitted'. For best results, you should logout and close all proposalCENTRAL browser windows.
 Login and click the 'Submitted' tab under 'Manage Proposals'. Your application should be listed with the status of 'Submitted' along with the date and time of the submission.

[Click here to close this window.](#)

If the application submitted was an LOI, it is found in the “In Progress” status next to **Proposal Status** within the Proposals tab. Please note that the Status column indicates “Submitted”. However, you may need to refresh your browser to see the updated status if you check this immediately after submission. Click the **View** button to see the application information submitted.

If the application submitted was a Proposal, it is found in the “Submitted” status next to **Proposal Status** within the Proposals tab. Click the **View** button to see the application information submitted.




The screenshot shows the proposalCENTRAL user interface. At the top, there is a navigation bar with the logo and user information (Jameson, Kyle - Logout, Admin). Below this is a secondary navigation bar with tabs: Home, Proposals, Awards, Professional Profile, Institution Profile, Grant Opportunities, and pCdrive. A red arrow points to the 'View' button in the first row of a table. The table has columns: Delete, Edit, Identifier, Title, Grant Maker, Program, Investigator, Status, and Date (EST). The first row contains: View, 108446, Kyle Jameson, [REDACTED], Conference Award, Jameson, Kyle, Submitted, 6/4/2020 10:52:00 AM.

Unsubmitting An Application

After an application is submitted, you have the option to unsubmit it to make changes, if necessary. The unsubmit option is **ONLY** available if:

- The application deadline is in the future.
- The grant maker has not already added the application to a committee for review.

If you unsubmit your application, you do not lose any data that was previously submitted. You see the application exactly as it was prior to submission. To unsubmit, click the Unsubmit link found next to the View button.

Delete	Edit	Identifier	Title	Grant Maker	Program	Investigator	Status	Date (EST)
	View	90672	test 3	Andrew McDonough B+ Foundation	Childhood Cancer Research Grant	Chernyakou, Stefanie	Submitted	7/5/2017 11:00:14 AM
Unsubmit	View	90671	test 2	Andrew McDonough B+ Foundation	Childhood Cancer Research Grant	Chernyakou, Stefanie	Submitted	10/27/2017 2:54:19 PM
Unsubmit	View	90670	test 1	Andrew McDonough B+ Foundation	Childhood Cancer Research Grant	Chernyakou, Stefanie	Submitted	7/5/2017 10:50:03 AM

When you unsubmit the application a notification e-mail is sent to the applicant and any other users listed on the “Enable Other Users to Access this Proposal” with a check in the “Auto Notify” column.



WARNING: After making changes to the application, you MUST repeat the submission process in order to re-submit your application.
