proposalcentral

FAQ

Applicants

PREPARED BY
PROPOSALCENTRAL SUPPORT

altum

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Profiles and Login

How do I update my username/password/email?

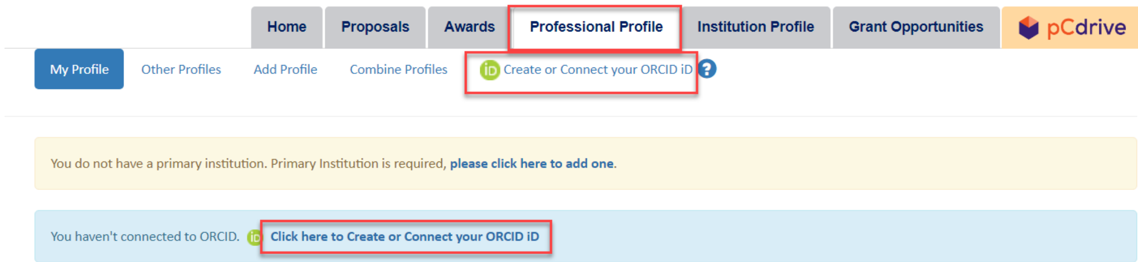
1. Go to https://proposalcentral.com/ and login under the "Application Login" section.
2. Click the Professional Profile tab and go to section 11: "Account Information" in the menu on the right.
3. You can update your username, password, and/or e-mail from this section. Make sure to click the **Save** button to retain your changes. Please note that you can only enter an e-mail address that is unique to ProposalCentral (i.e. not already in use). Therefore, if your main purpose for updating is to consolidate with another ProposalCentral account that you have, please see the "I think I have multiple accounts on ProposalCentral. Can they be combined?" section.

My application requires an ORCID identifier. What is this?

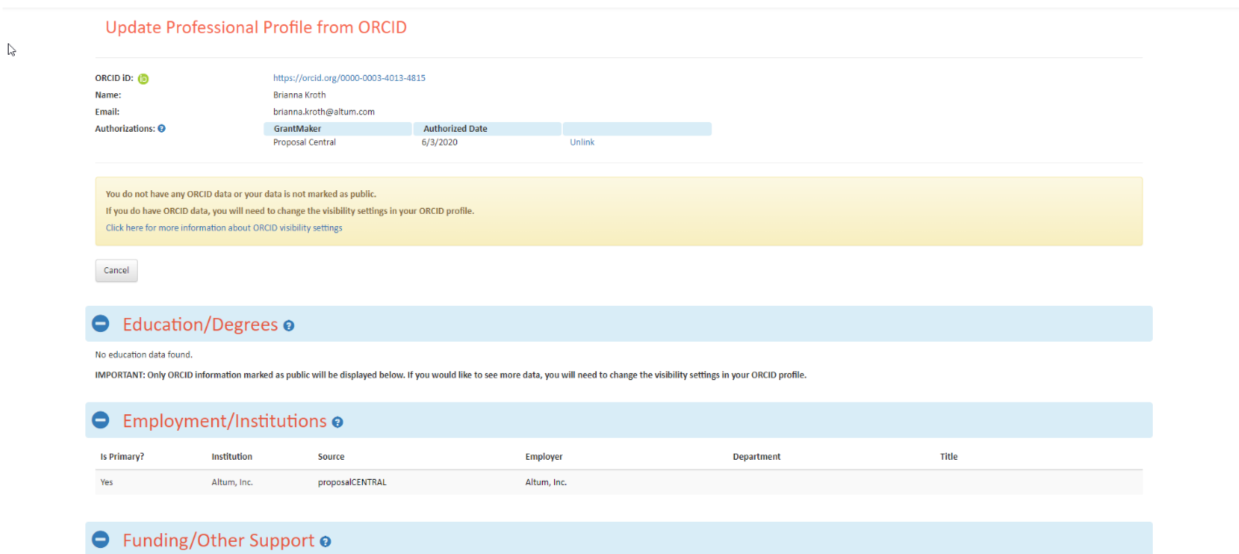
ORCID provides a persistent digital identifier (an ORCID ID) that you own and control, and that distinguishes you from every other researcher. You can connect your iD with your professional information — affiliations, grants, publications, peer review, and more. You can use your iD to share your information with other systems, ensuring you get recognition for all your contributions, saving you time and hassle, and reducing the risk of errors to avoid rekeying data within ProposalCentral.

How to connect your ORCID account with ProposalCentral:

1. Go to https://proposalcentral.com and logging in under the "Applicant Login" section.
2. Then, click on the "Professional Profile" tab.
3. Then, click on "Create or Connect your ORCID iD" and then your ORCID account and ProposalCentral accounts will be linked.



This displays a summary page where you can view your ORCID data as well as the information in your Professional Profile on ProposalCentral. To access your ORCID account click on the 'ORCID iD' link listed at the top of the page, shown above.

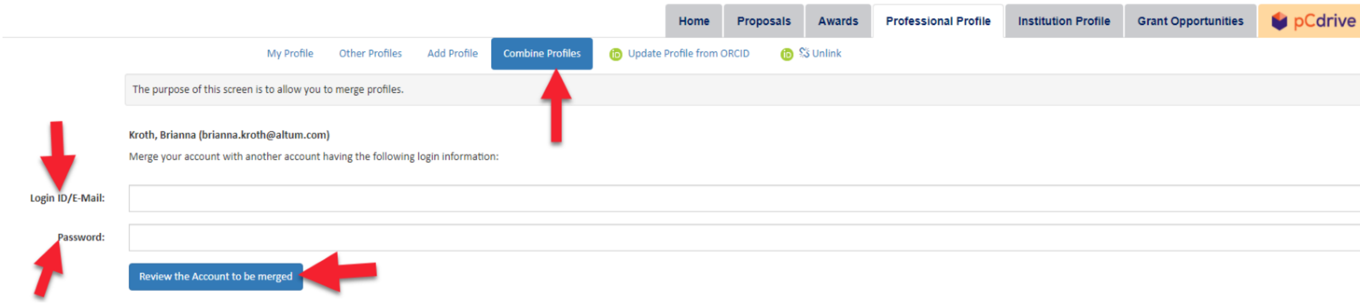


For more information regarding connecting your ORCID to ProposalCentral, please refer to the "How to Register as a ProposalCentral User" tutorial.

I think I have multiple accounts on ProposalCentral. Can they be combined?

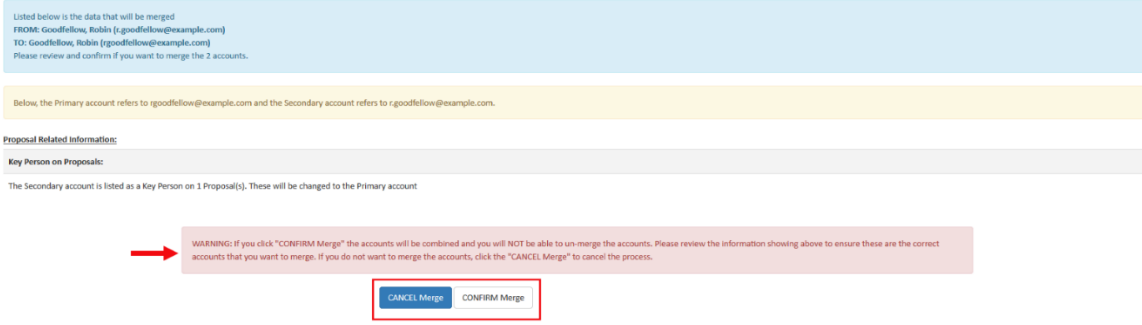
Yes, to do so:

1. Go to https://proposalcentral.com/ and login under the "Application Login" section using the account you'd like to maintain as your "current" account.
2. Click the Professional Profile tab and the "Combine Profiles" option.
3. Enter the e-mail and password for the other account to add to the current account that you are logged in as and click the **Review the Account to be merged** button.



4. A summary of the records (e.g. applications, grants) contained under the other account display. To proceed with the account merge, click the **CONFIRM Merge** button. To cancel the merge, click the **CANCEL Merge** button.

PROCEED WITH CAUTION: Once you merge the two accounts you cannot un-merge them.



How do I set up two-factor authentication for my account?

Two-Factor Authentication (2FA) is an extra security step requiring two different types of proof to log in, preventing unauthorized access.

To enable 2FA for your ProposalCentral account, log in and navigate to your Professional Profile.

On the menu on the left-hand side of the screen, find “Section 12 – Enable Login Security with 2FA.”

Follow the instructions on this page to link your ProposalCentral account with an authenticator app. This can be done by scanning the QR code provided on the page.

Once 2FA has been enabled, there is a “Remember Me” functionality associated with users that have opted in and configured 2 factor authentication on their Professional Profile.

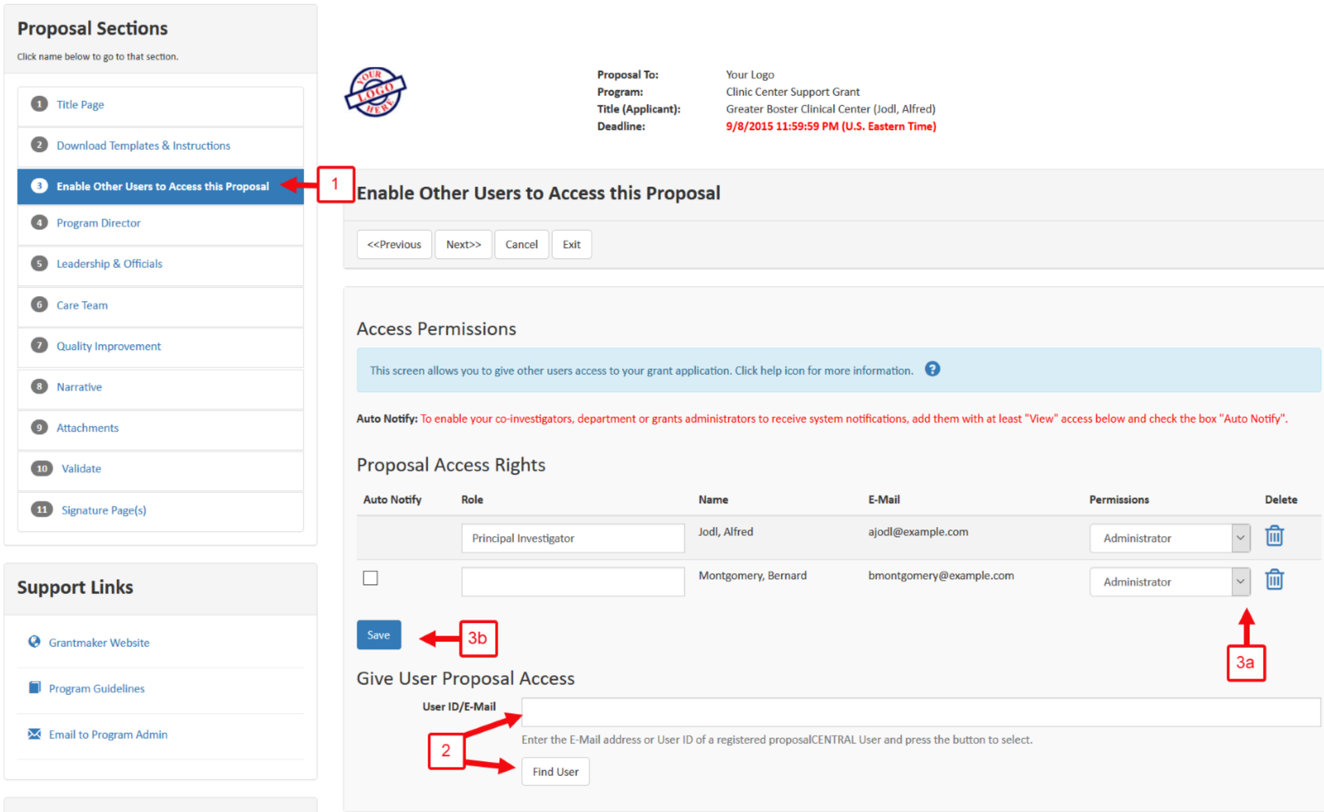
I am a new grants administrator for my institution. How do I see all Submitted, In Progress and Awarded applications?

The Principal Investigators (PIs), or another administrator, on the applications and grants must provide you with access.

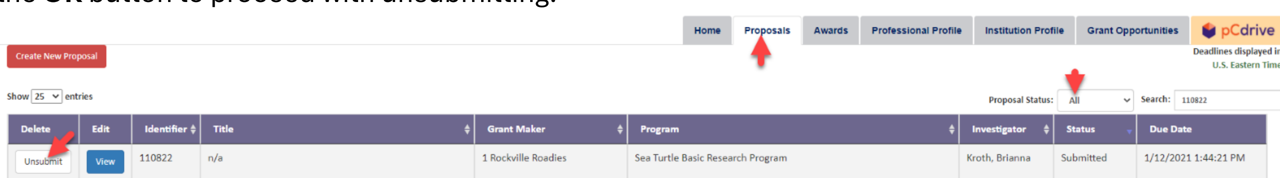
TIP: Alternatively, please contact your Client Support Analyst for details about ProposalCentral's Insights for Institutions feature. This service allows you access to all applications and awards for your institution.

An applicant with an in-progress application can provide institutions access by:

1. Going to https://proposalcentral.com/ and logging in under the "Application Login" section.
2. Clicking on the Proposals tab and then the **Edit** button next to the appropriate application.
3. Clicking the "Enable Other Users to Access this Proposal" section in the gray menu on the left.
4. Adding the appropriate e-mail address at the bottom and clicking the **Find User** button.
5. Selecting the appropriate access level from the drop down in the "Permissions" column and clicking the **Save** button. The possible access levels are:
    - View: View only. Cannot change any details.
    - Edit: Can view and change information in the application. Cannot submit the application or view the "Enable Other Users to Access this Proposal" screen.
    - Administrator: Can view, edit and submit the application. Can give access rights to others on the "Enable Other Users to Access this Proposal" section.

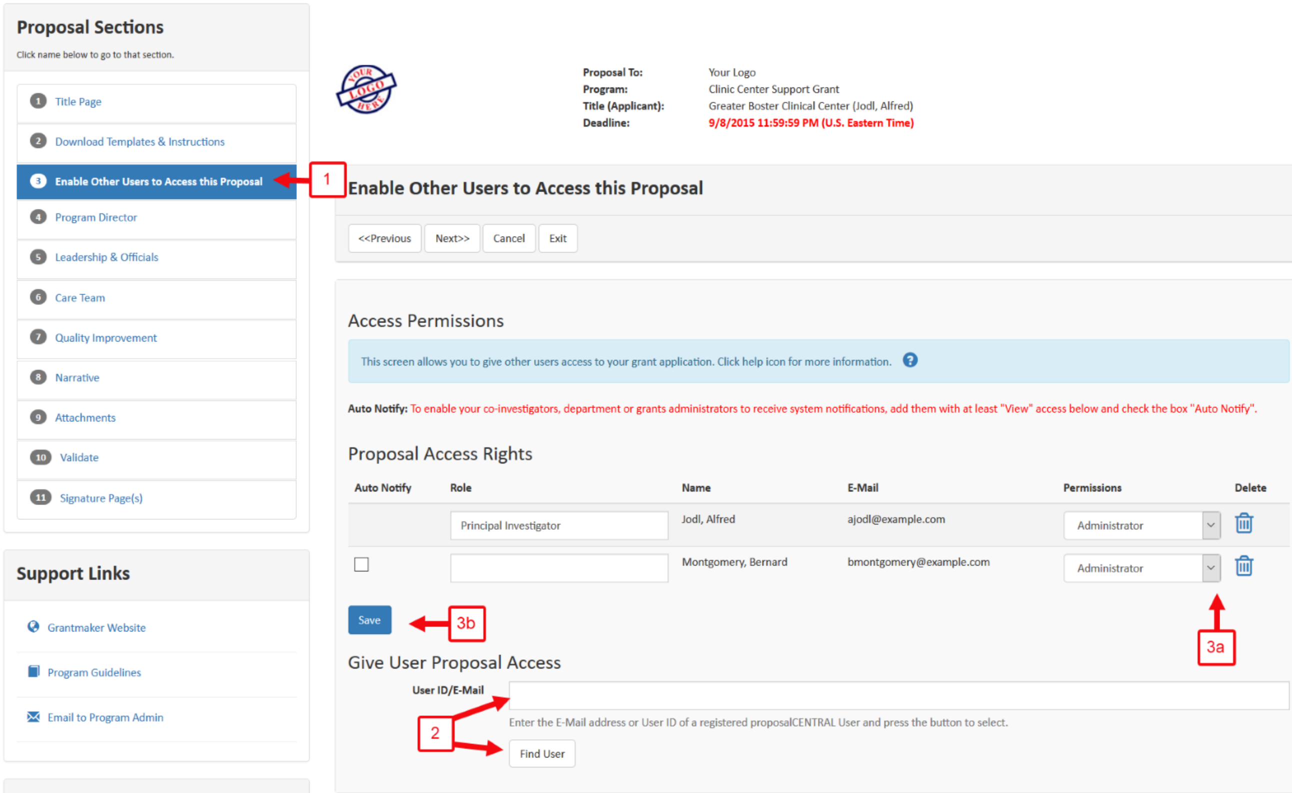


An applicant with a submitted application that is not awarded cannot provide you access without unsubmitting the application. And, they cannot unsubmit after the deadline or if the Grant Maker has started the reviewer process for it. If they are still able to unsubmit it, they can do so by clicking the **Unsubmit** button shown in the screenshot below in the Proposals tab and then clicking the **OK** button to proceed with unsubmitting.



Once the PI has unsubmitted the application, access is granted by:

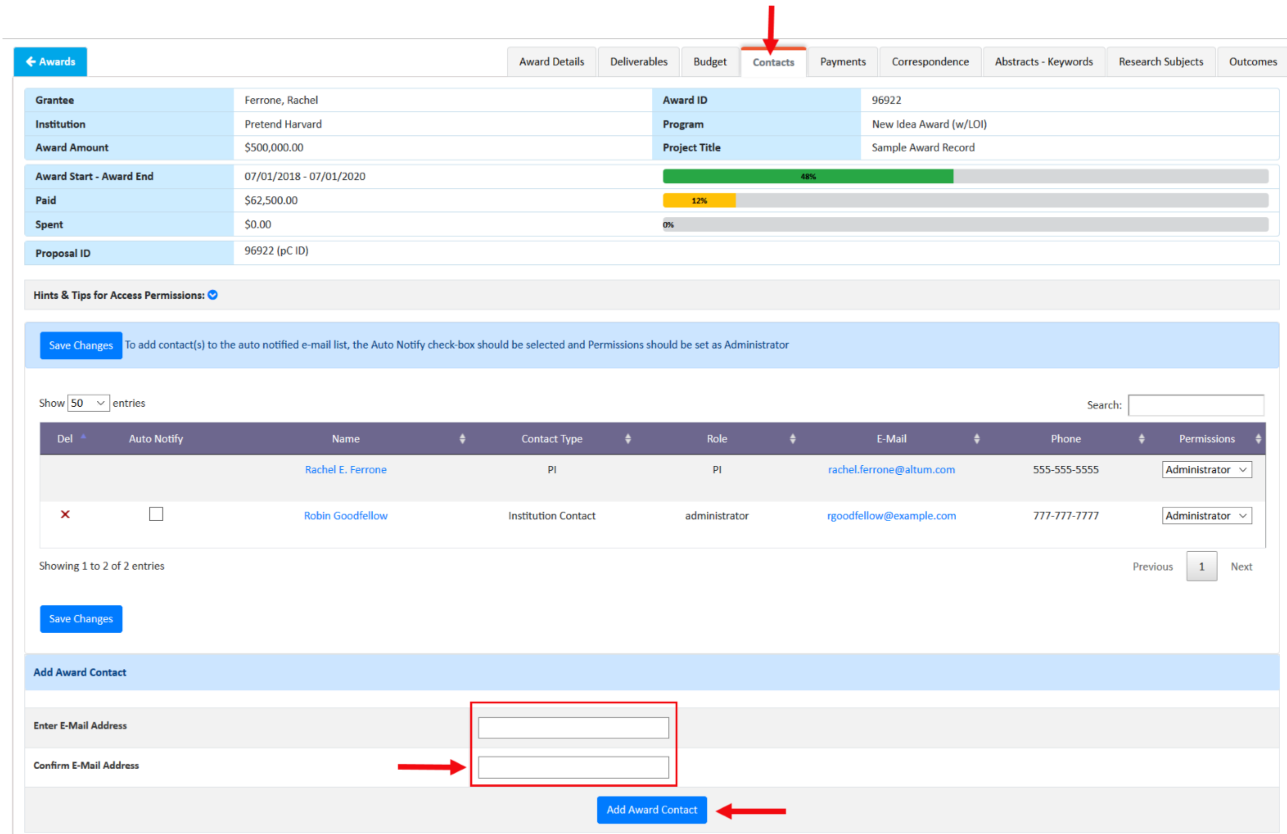
1. Clicking the "Enable Other Users to Access this Proposal" link in the gray menu on the left.
2. Adding your e-mail address at the bottom and clicking the **Find User** button.
3. Once added, they should select "Administrator" from the drop down in the "Permissions" column (3a) and click the **Save** button (3b). Only a user with Administrator permission will be allowed to submit the application.



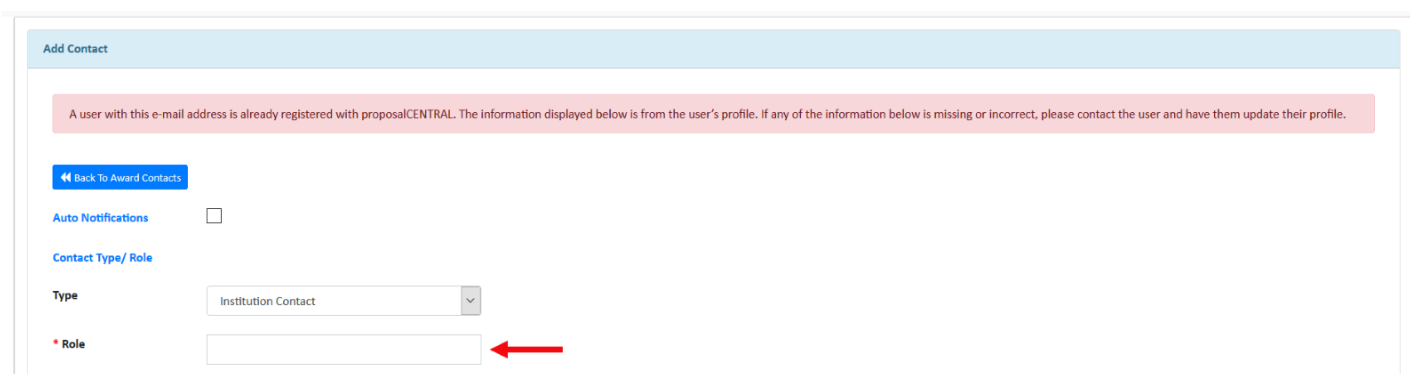
Please note that the application must be submitted again for the Grant Maker to have it. Any user with Administrator permissions for the application can submit by going to the Submit section found in the gray menu on the left and clicking the Submit button.

A PI on an awarded grant can provide access by:

1. Going to https://proposalcentral.com/ and logging in under the “Application Login” section.
2. Clicking on the Awards tab and clicking either Identifier number or the Title link for the appropriate grant.
3. Clicking Contacts tab.
4. Adding your e-mail address twice and clicking the **Add Award Contact** button.

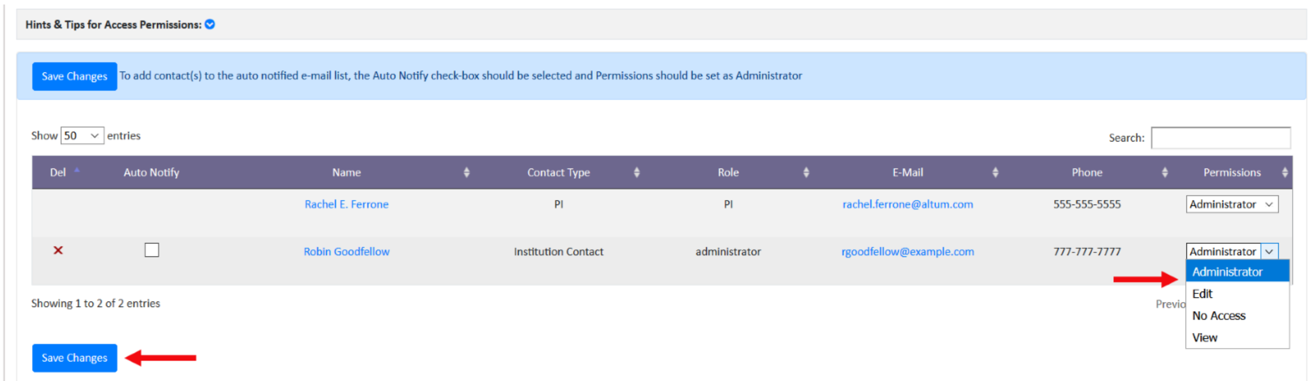


5. Entering your role at the top (e.g. Signing Official, Financial Officer) and clicking the **Save & Close** button at the bottom.



6. Selecting the appropriate access level from the drop down in the "Permissions" column and clicking the **Save Changes** button. The possible access levels are:

- View: View only. Cannot change any details.
- Edit: Can view and change information in the grant. However, cannot make changes to the "Contacts & Users Access" screen.
- Administrator: Can view, edit, and give access rights to others on the "Contacts & Users Access" section.

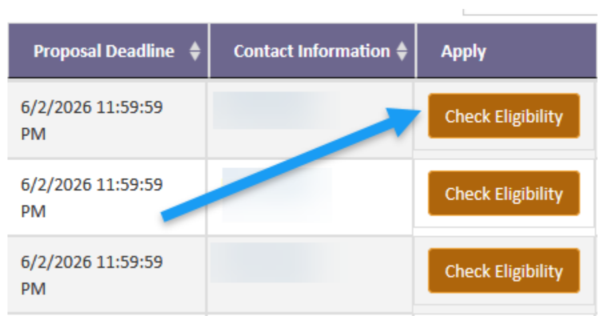

Hints & Tips for Access Permissions:
Save Changes
To add contact(s) to the auto notified e-mail list, the Auto Notify check-box should be selected and Permissions should be set as Administrator
Show 50 entries
Search:
Del
Auto Notify
Name
Contact Type
Role
E-Mail
Phone
Permissions
Rachel E. Ferrone
PI
PI
rachel.ferrone@altum.com
555-555-5555
Administrator
Robin Goodfellow
Institution Contact
administrator
rgoodfellow@example.com
777-777-7777
Administrator
Administrator
Edit
No Access
View
Showing 1 to 2 of 2 entries
Save Changes

Application Process (PI)

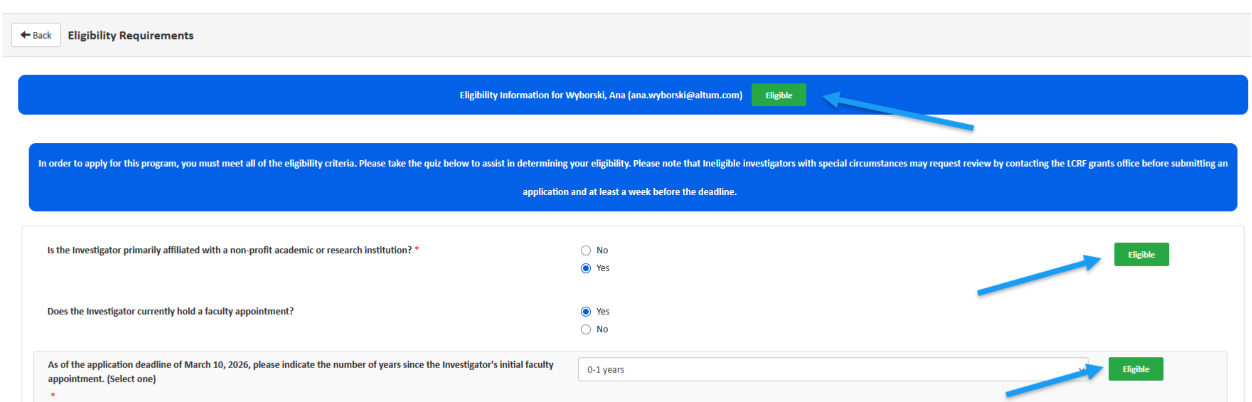
What is an Eligibility Check, and how do I complete it?

Some funders may require that applicants complete an Eligibility Check in order to begin an application for their grant. This feature allows funders to ask questions regarding an applicant's eligibility to apply for the grant. If an applicant does not meet all requirements set forth in the Eligibility Check, they will not be able to apply for the grant. Applicants can contact the Grant Maker through ProposalCentral to submit an "exception request" and ask that they be allowed to apply.

If a grant opportunity requires an Eligibility Check, there will be a button labeled "Check Eligibility" in line with the opportunity, as shown below:

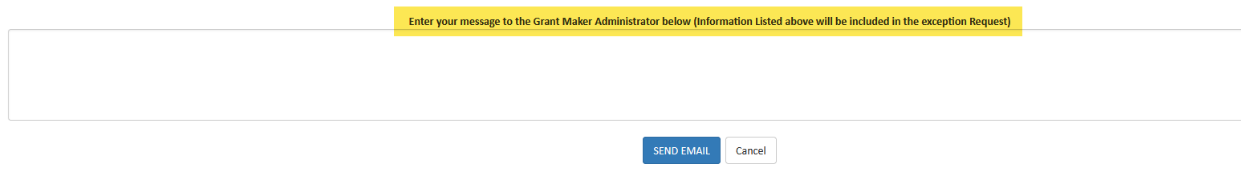


Clicking this button will open a new screen which displays the questions configured by the Grant Maker. The applicant must respond to each question, and the system will indicate whether they are eligible or not, based on their responses:



If the applicant is determined to be eligible, a button labeled "Apply Now" will appear at the bottom of the page. Clicking "Apply Now" will generate an application and the applicant can begin working on it.

If they are not eligible, the button will appear as “Send Exception Request to Grant Maker.” Clicking this button will open a text entry box where the user can request an exception from the Grant Maker by explaining their responses or extenuating circumstances.

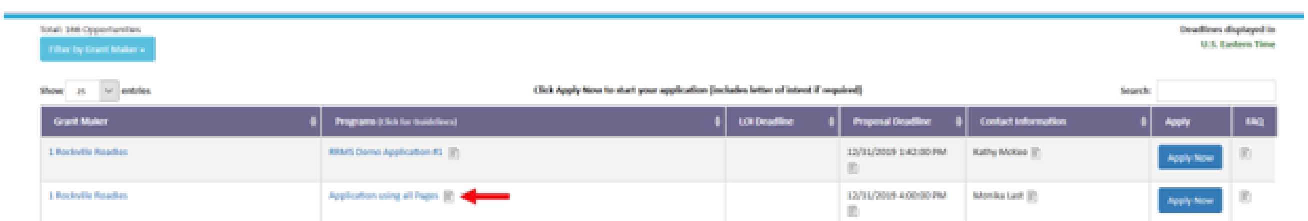


Once the user has entered their reasoning, they will click “SEND EMAIL.” This will send a copy of their responses, along with their exception request, to the Grant Maker for review. The Grant Maker will then contact the user directly to discuss their eligibility.

How do I access the application templates/instructions for an application?

Before logging in or starting an application, you can access the Policies and Guidelines by:

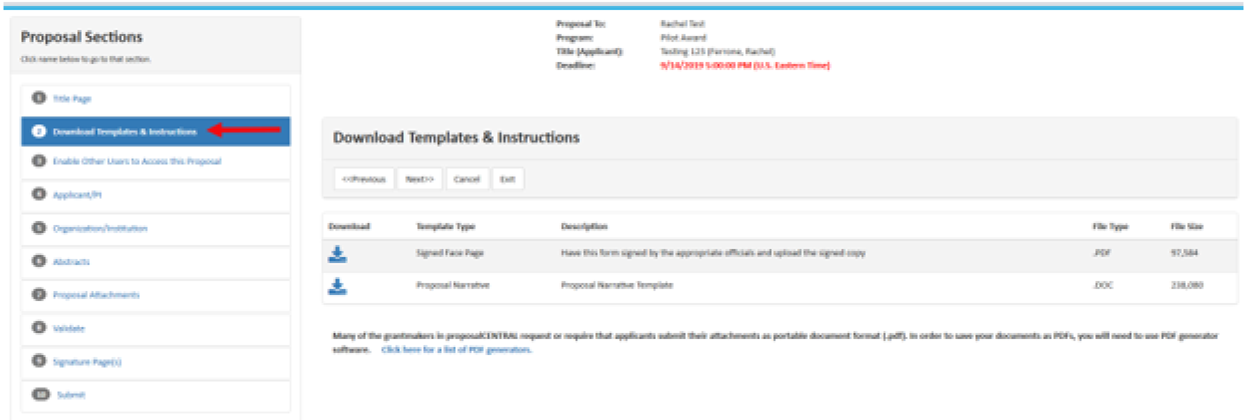
1. Search for the opportunity and click either the link or document icon in the “Program” column to see the Policies & Guidelines. Most often the Grant Maker includes information about the purpose of the grant, who is eligible, and what is expected in the application. Based on this information, if you decide to apply you can access more information/templates by following the next set of instructions.



To see detailed instructions and download templates, you must login and start an application. To do this:

1. Click the “Login” link in the upper right to return to the homepage. From there, login under the “Application Login” section.
2. Click the Grant Opportunities tab, filter the list by the Grant Maker and click the **Apply Now** button for the appropriate program.
3. Once in the application, add a title and click the **Save** button. The Grant Maker posts instructions throughout the application in addition to templates and information provided in the “Download Templates & Instructions” section found in the menu on the

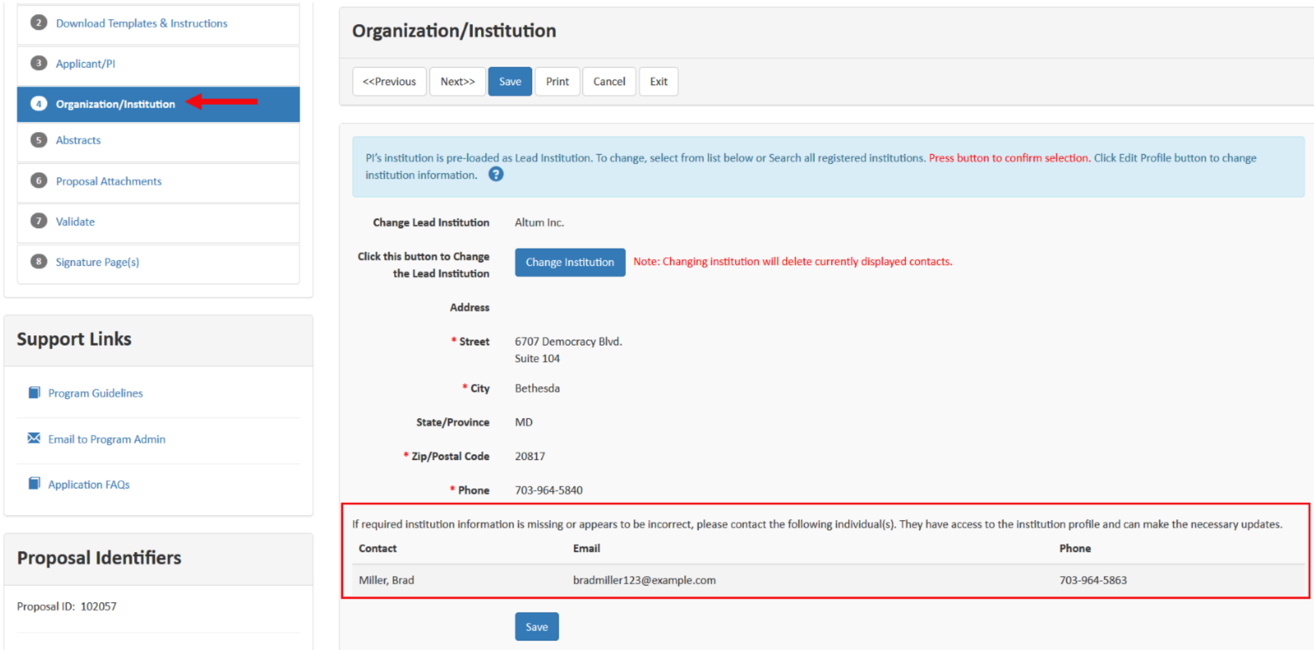
left. If you do NOT see this section, the Grant Maker has opted to NOT include any templates or instructions beyond what you see in the other sections.



I answered "yes" on the assurances page for either human (or animal) testing, but I get a validation error and I can't enter my OHRP (OLAW) number. How do I correct this error?

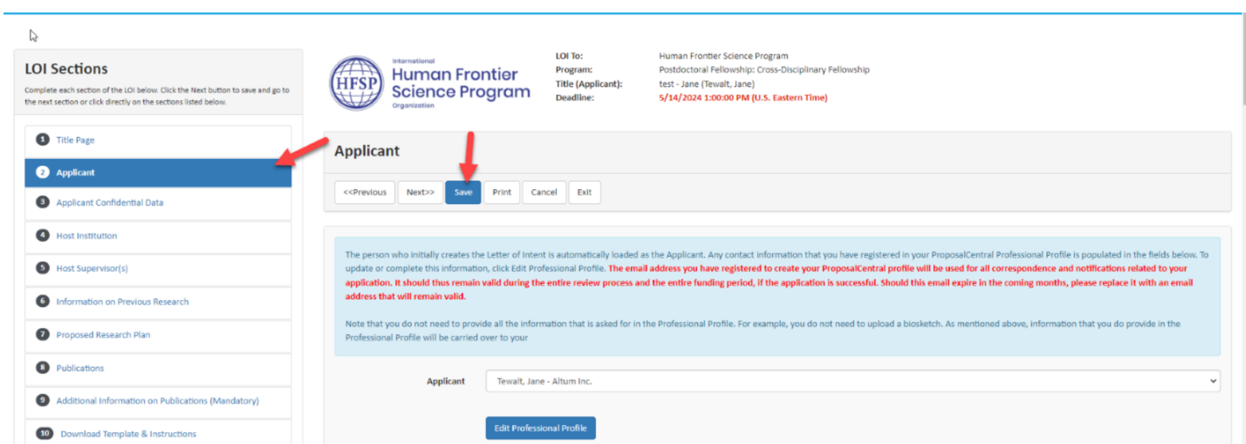
To correct this error, the institution profile must be updated to include this information. Only users with access to the lead institution's profile can update it. To find out who this person is, go to the section of your application that collected the name of the lead institution. The name of this section could be anything but is typically referred to as something along the lines of "Organization/Institution" and is often found in the 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 the institution who created the profile and should have access to update it.

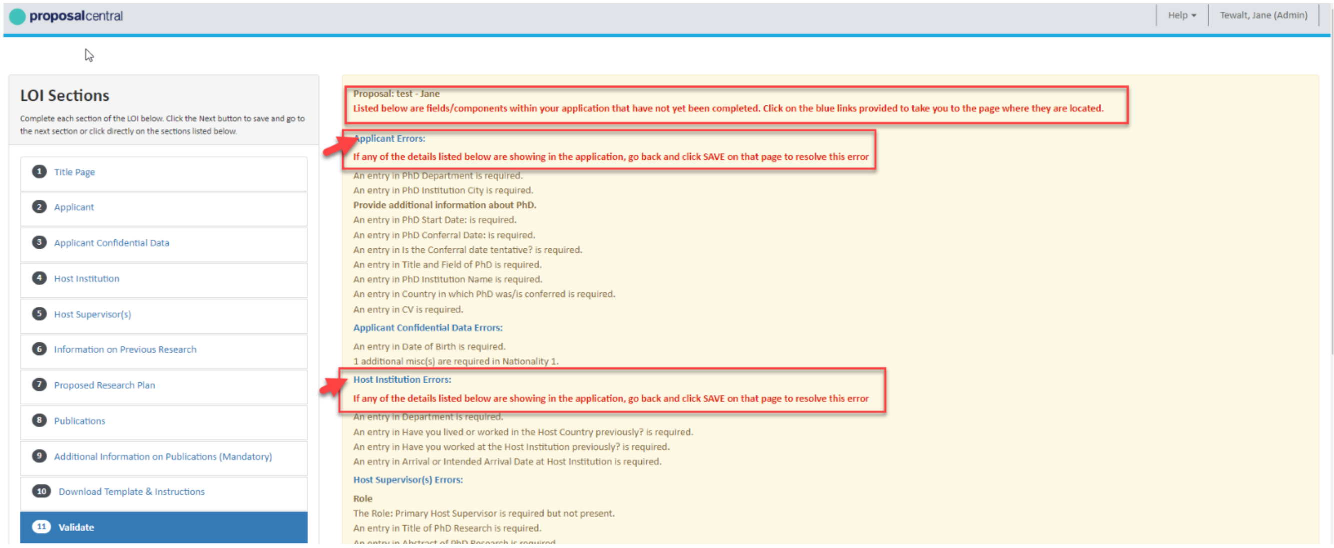
If that person is no longer at the institution, contact Customer Support (pcsupport@altum.com) to find out if there are other individuals at the institution who can update the institution profile.



I have already added information to the application, or my Professional Profile, and the information shows on the tab, but I am still receiving a validation error.

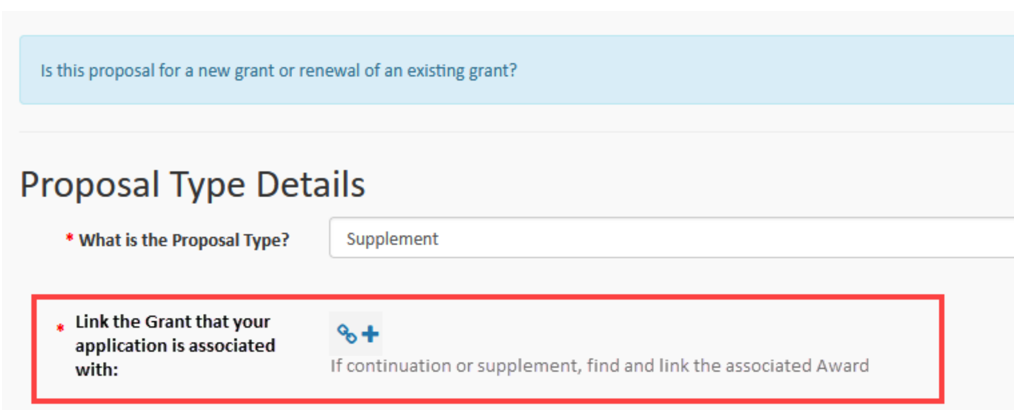
To resolve this error please hit the Save button on the Application tab where the validation error is occurring.   You may go to the tab in the application quickly by clicking on the blue headers for the validation error.





I need to link my application to an award because it is a supplemental request. How do I do this?

If a Grant Maker is hosting an opportunity that is a supplemental request to an existing award, there will be a section within the application configured to link that award to the application. This section will be within the first page (usually named “Title Page” or similar) of the application, as shown below:

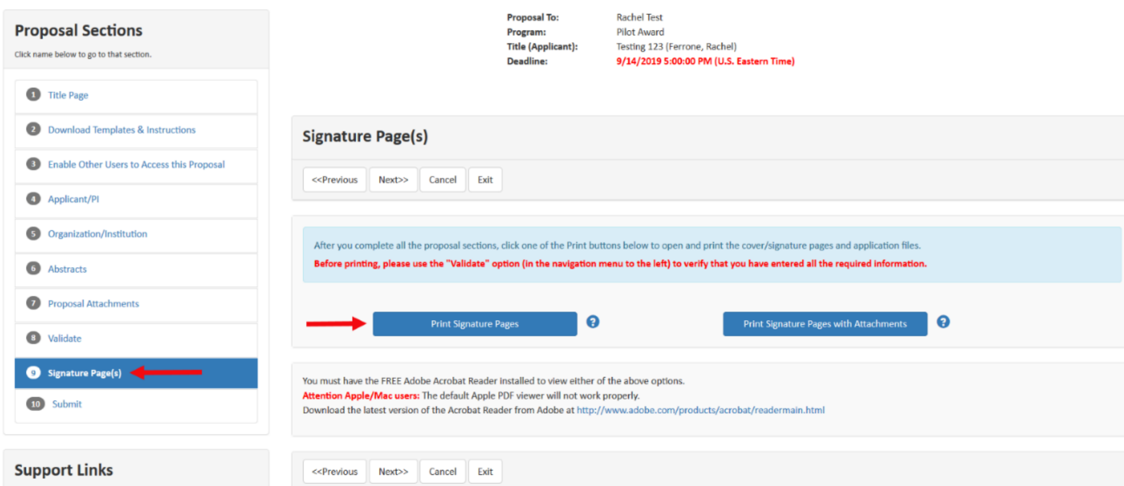


Click the link icon to search for the associated award and add it to the application. This will then link the application with the existing award throughout ProposalCentral.

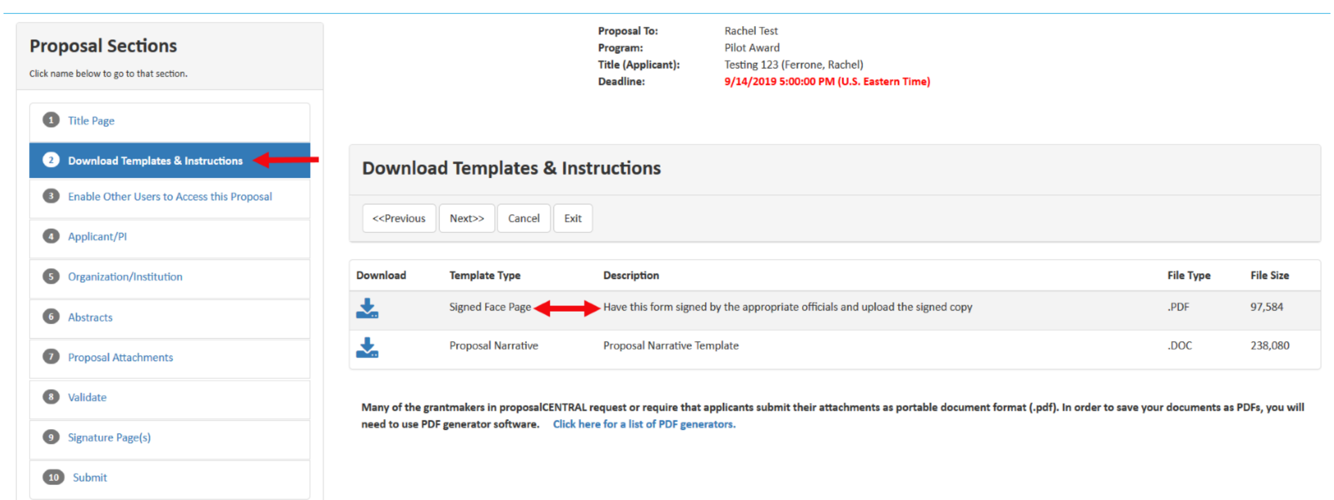
I am required to upload a Signature Page with my attachments. Where is the Signature Page?

There are two ways the Grant Maker collects a signature page:

1. **Using ProposalCentral's Signature Page**: 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 typically at the end of the application, often between the "Validate" and "Submit" sections in the gray menu on the left. To access the Signature Page, click the **Print Signature Pages** button on the left. This generates a PDF that includes several templates, the first of which is the Signature Page.



2. **Using their own Signature Page**: Some Grant Makers provide their own signature page. If so, their form is found in the section titled "Download Templates & Instructions" in the menu on the left.



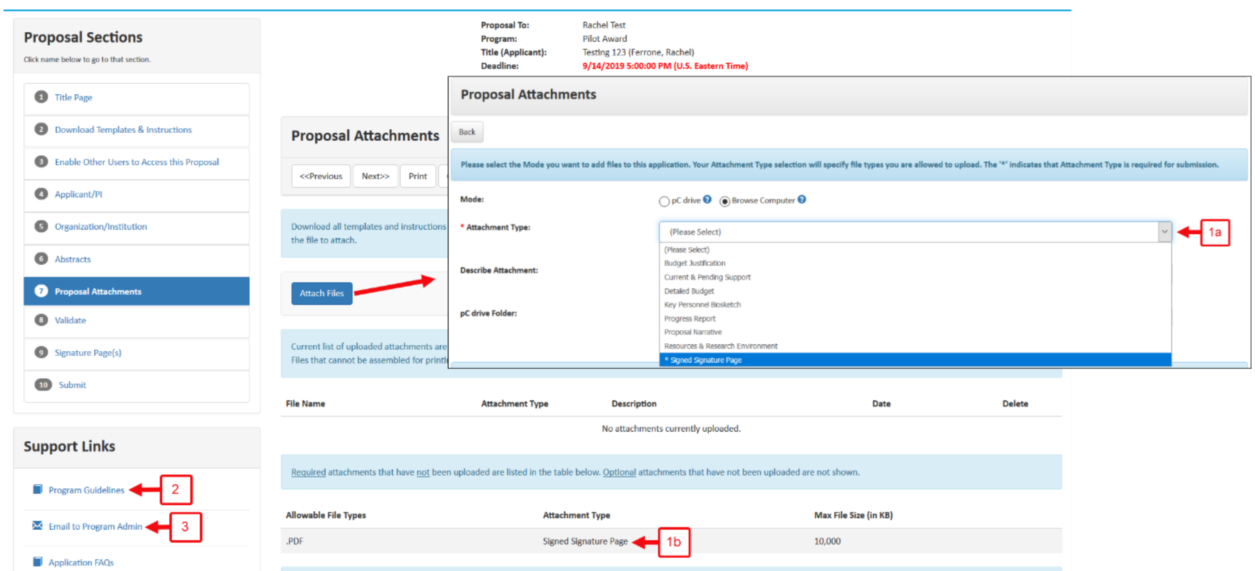
How do I know if I need to upload the Signature Page into the application?

There are a few ways to determine if this is required:

1. In the section of the application that allows you to upload files:
    a. Check the “Attachment Type” drop down menu to see if the Grant Maker has provided an option for a signature page.
    b. Check the section with the instructions in the blue bar that state, “<u>Required</u> attachments that have <u>not</u> been uploaded…” The table below those instructions lists all attachments that are required to upload that are NOT uploaded yet. If a signature page is required and not yet uploaded, it will be listed.

2. Review the Program Guidelines that the Grant Maker has supplied by clicking the link or document icon for “Program Guidelines” in the Support Links section #2.

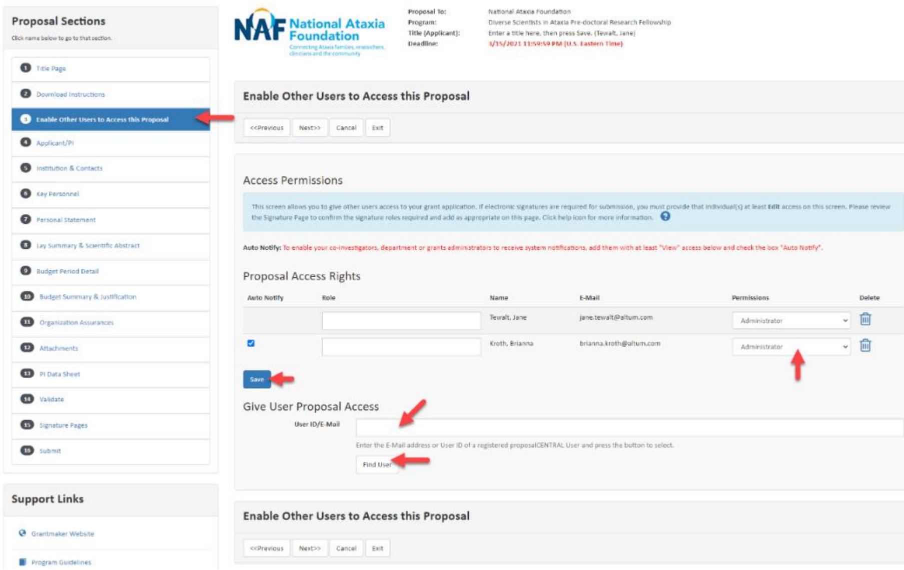
3. If it’s still not clear, contact the Grant Maker by clicking the “Email to Program Admin” link in the Support Links section #3.



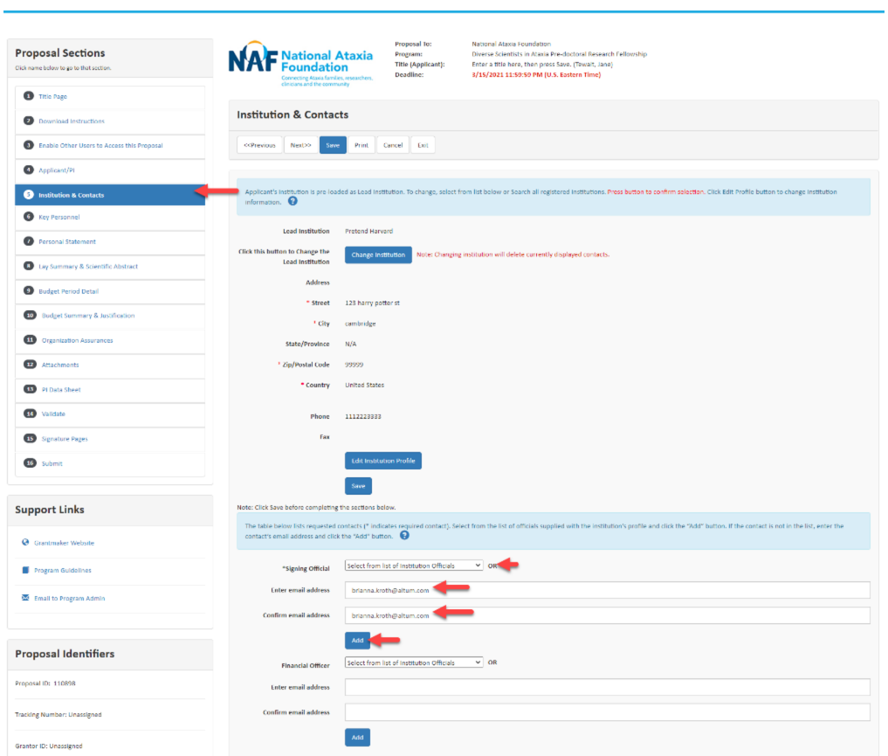
How do I navigate a Proposal that requires electronic signature(s)?

Please navigate to the tab “Enable Other Users to Access this Proposal” and add the Signing Official by entering their email address associated with their profile in the Institution Profile (see below Tab “Institution & Contacts” to ensure that you have the correct email address). You will enter the email in the User ID/Email field, click on Find User, and when the entry for the Signing

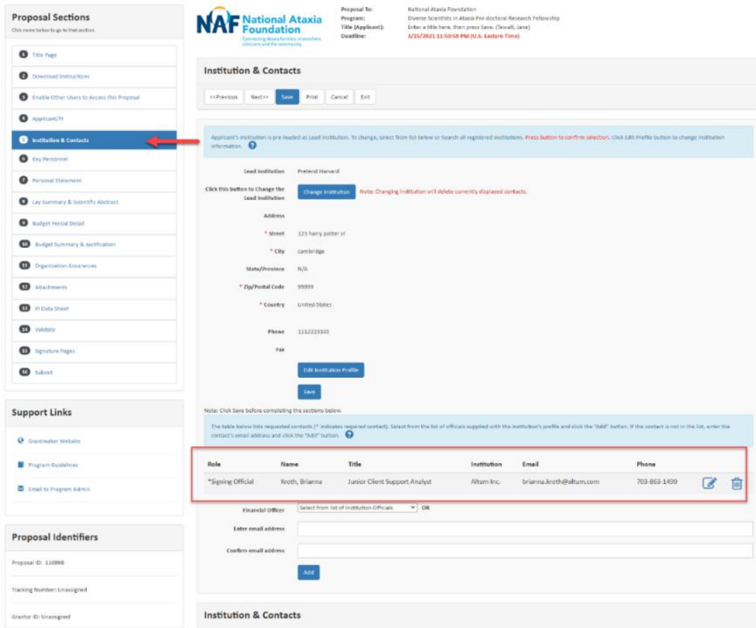
Official appears, you will need to update their Access to Edit or Administrator Access. (Edit Access will allow them to view and sign only, Administrator Access will allow them to view, sign and submit).



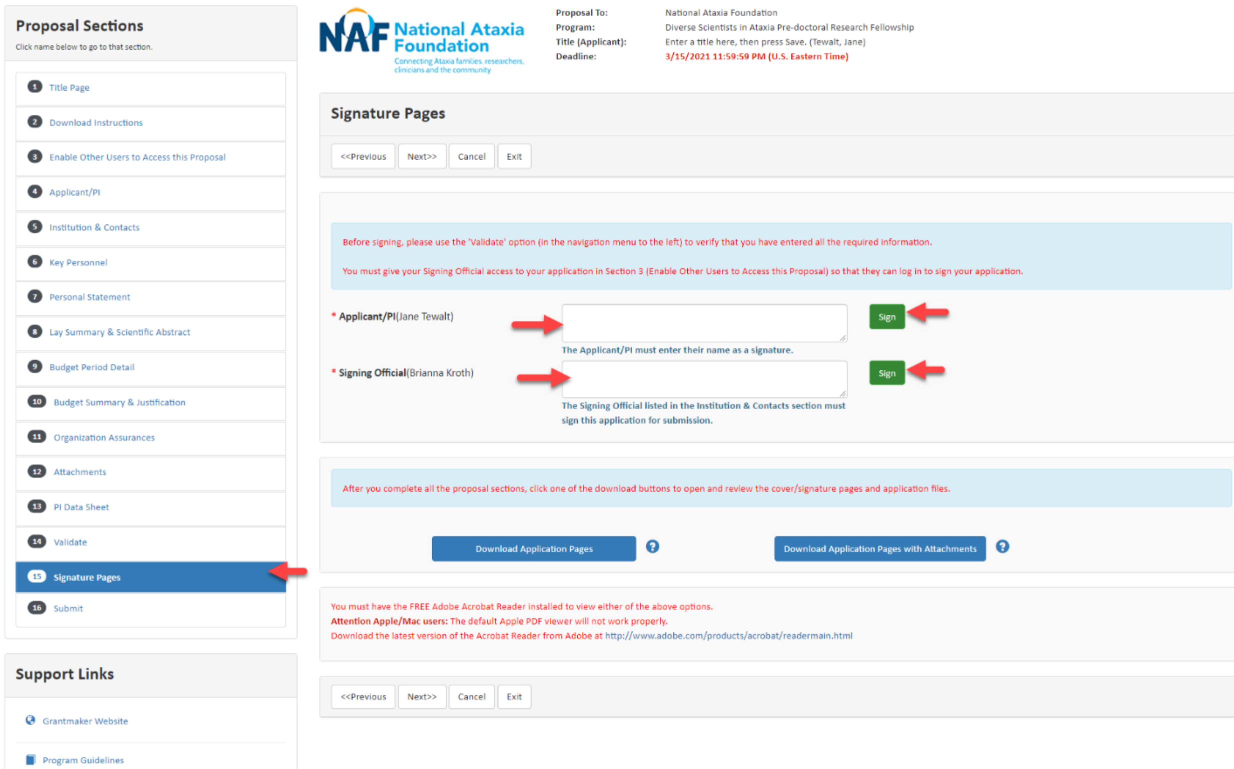
To add the names of the Institutional Officials you will need to navigate to “Institution & Contacts” select the Institution that you are with and either select the name from the drop downs for the Institutional Officials or enter their email address in the Enter Email Address fields and click Add.



Below is what it looks like when all fields have been filled with Institution Contacts.



After you have selected the Institutional Officials, the profiles that are required to sign will be displayed in the "Signature Page" Tab. The Institutional Officials will need to login using their credentials for ProposalCentral and navigate to this tab, type their name in the white box, and click on the green sign button. If all signatures are present the application can be submitted if all other information has been entered into the proposal correctly.

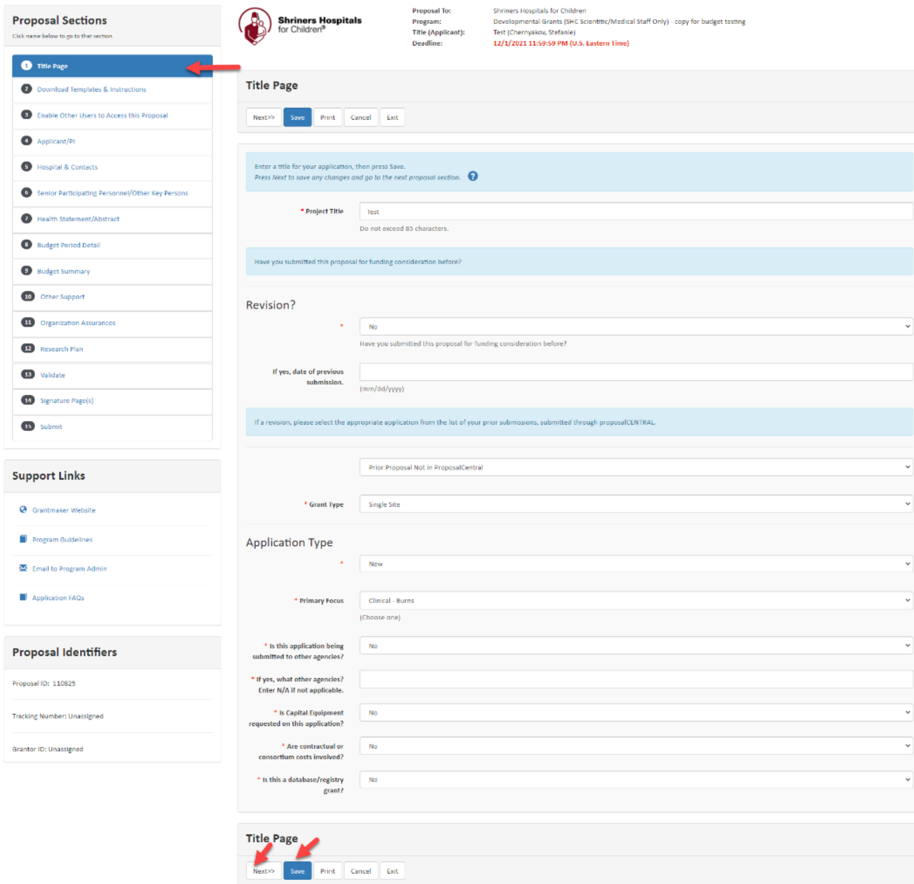


If I am the Institutional Official and need to sign off on a Proposal, I will take the following steps to sign the Proposal:

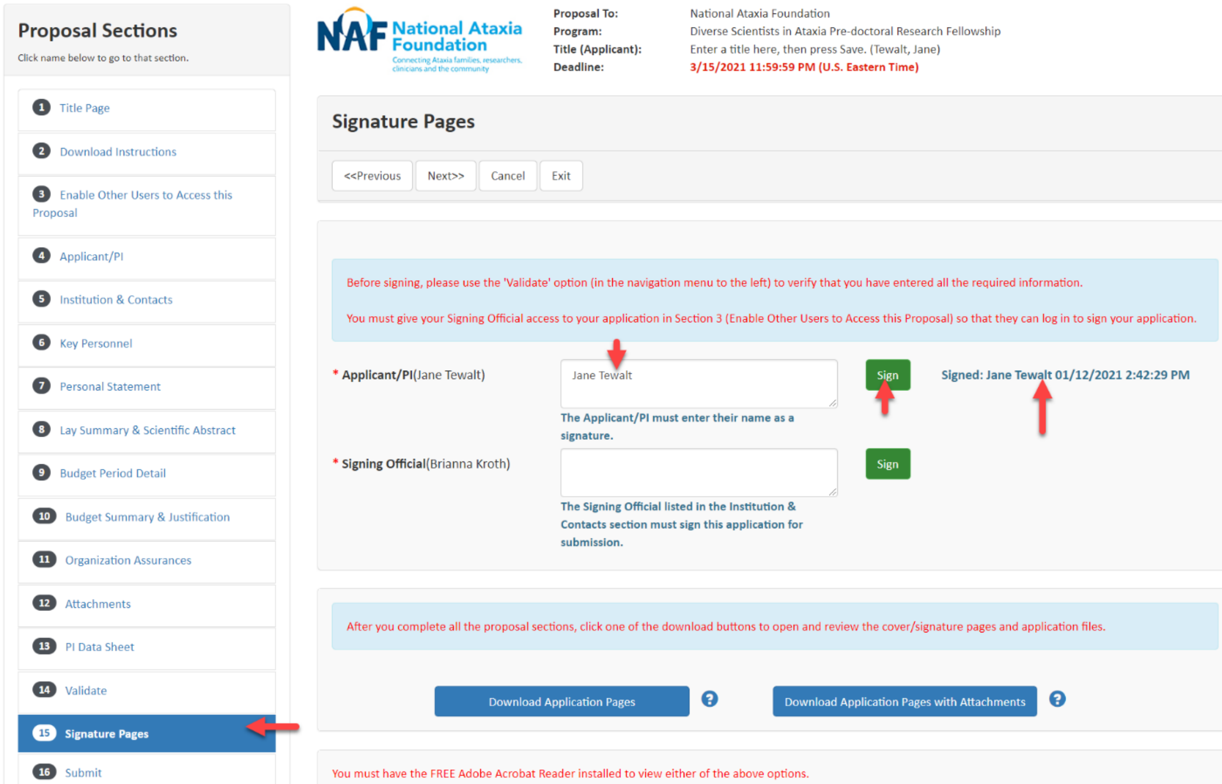
1. Login to ProposalCentral with my own credentials

2. Navigate to the Home tab and click on the Identifier Number for the Proposal that I need to sign in order to open the Proposal.

3. Click on each tab to review the information that is being submitted. When you need to go to the next tab you may hit save and next or simply click on the next tab on the left of the screen.



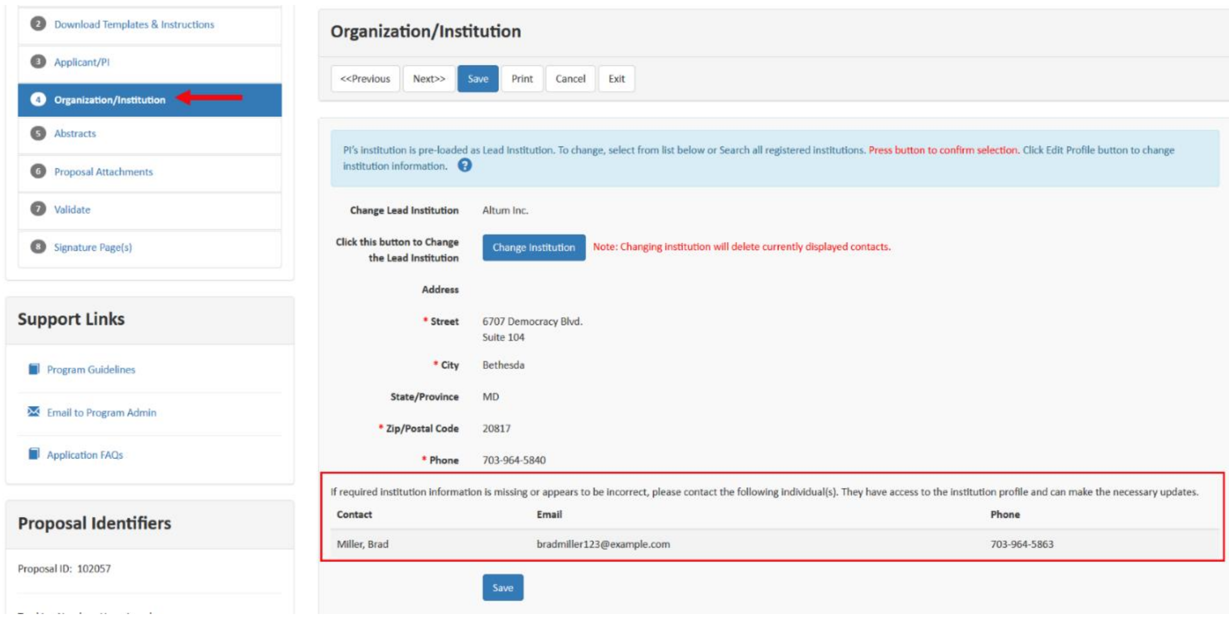
4. Once I have reviewed the proposal, I will go to the Signature Page tab and click inside of the white box. When my cursor is inside of the white box, I will need to type my name there and click on the green “Sign” button. After this a notation will be placed to indicate the time/date of your Signature.



The contact information for my institution is incorrect. How is this updated?

Only people with access to the 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". It is typically found in the menu on the left after the page that collected the name of the PI/applicant. Below the information about the institution will be the name, e-mail, and phone number of the person at the institution who created the profile and should have access to update it.

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



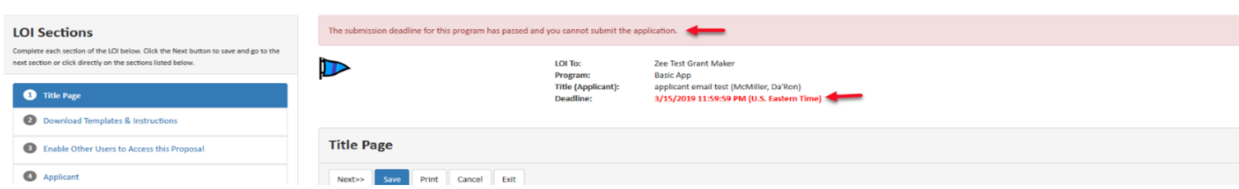
If I unsubmit my application, will I lose everything that I have already completed?

No, you will not lose any information. However, if you want the Grant Maker to have your application, you must repeat the submission process.

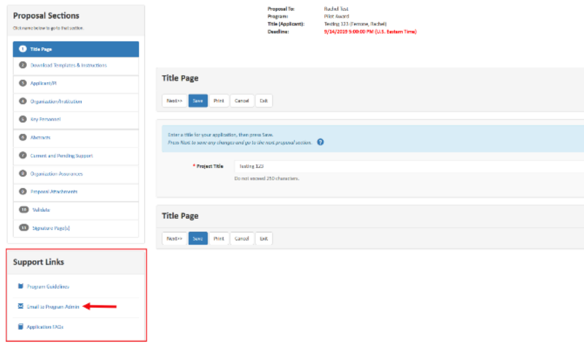
I completed and validated my application, but I do not have the submit link. Where is it?

There are two possible reasons you may not have the ability to submit:

1. **The deadline has passed**. At the top of the page the deadline appears in red. If it's in the past there is also a note indicating that the deadline has passed and you cannot submit.



If that is the case, users are not able to submit unless the Grant Maker provides an extension. To contact the Grant Maker, click the "Email to Program Admin" link in the Support Links section of the menu on the left.

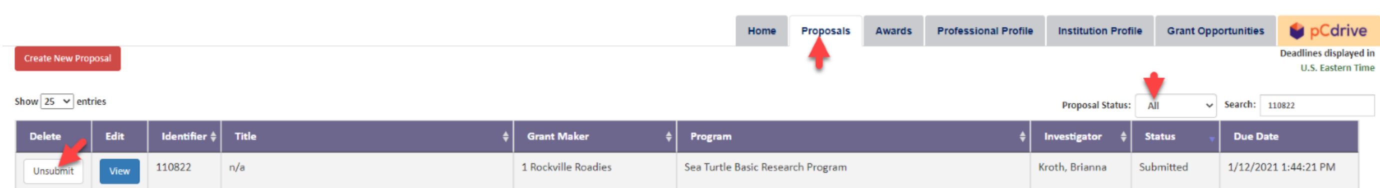


NOTE – Altum ProposalCentral staff CANNOT provide an extension; applicants must contact the Grant Maker for this action.

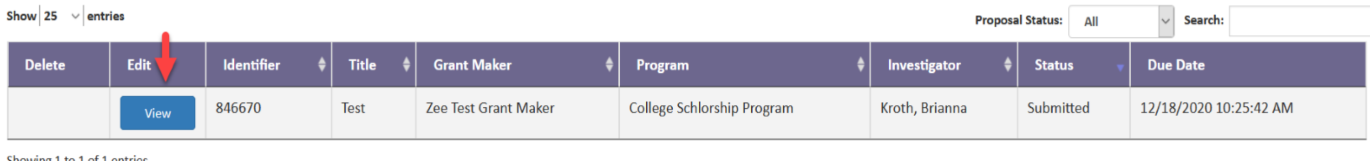
2. **You do not have permission**. If your access level on the application is either "View" or "Edit" you are not able to submit the application; only "Administrator" level can submit. To determine your access level, look in the menu on the left that lists the sections of the application. If you do NOT see a section titled "Enable Other Users to Access this Proposal" it means you do NOT have "Administrator" permissions. To submit you need to contact a user with "Administrator" permission.

I submitted my application, but I need to change one of the uploaded attachments. How can I do this?

If it's before the deadline and the Grant Maker has not added your application to a review committee, you can unsubmit the application by clicking the **Unsubmit** button next to the application in the Submitted section of Proposals tab. You are prompted to confirm that you want to unsubmit it. If you want to proceed, click the **Ok** button. You then see the application in the "In Progress" section and you can click the **Edit** button next to it, make the appropriate changes, and then re-submit the application. **You MUST re-submit the application in order for the Grant Maker to review it.**

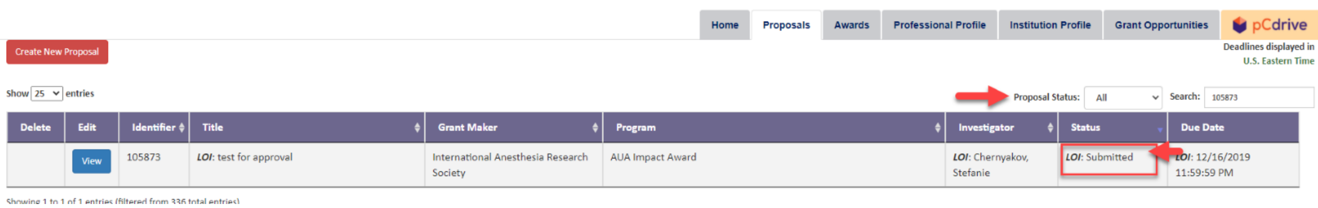


If it is after the deadline and/or the Grant Maker has added your application to a review committee, you will not be able make any changes. However, the Grant Maker can either update the file for you or unsubmit the application to allow you to make changes and resubmit. Contact the Grant Maker to see if they are willing to allow changes to the application. You can e-mail the Grant Maker by clicking the **View** button next to the application in the Submitted section of Manage Proposals and then clicking the "Email to Program Admin" link found in the menu on the left.



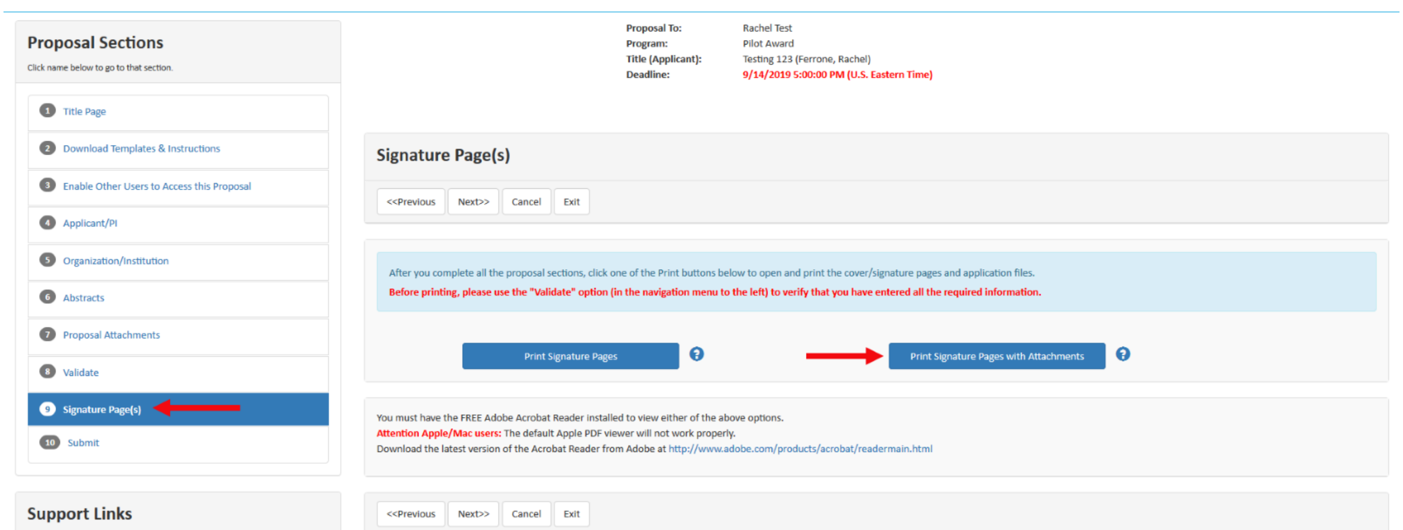
I submitted my LOI, but it is still "In Progress." Has it been submitted?

No. A status of “In Progress” is not equivalent to submitted. You can verify the submission status by looking in the “Status” column. If it states “***LOI***: Submitted” then it was successfully submitted.



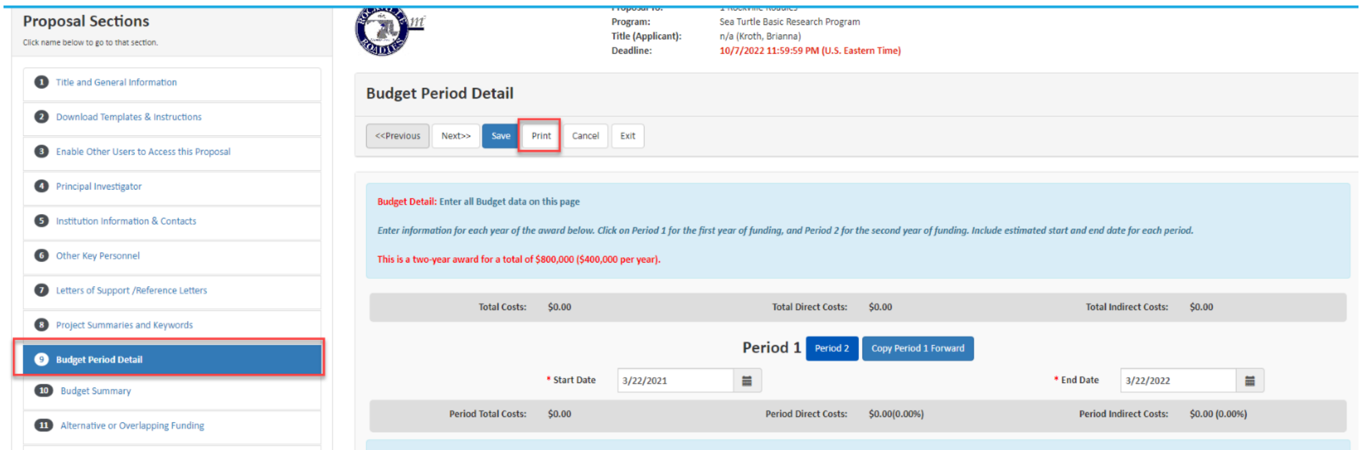
How can I print a copy of my application?

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 and located between the Validate and Submit sections in the menu on the left. Click the **Print Signature Pages with Attachments** button on the right. This generates a PDF that includes several standard templates (e.g. signature page, contacts, abstracts), followed by the Word and PDF documents that you uploaded.



I printed my application, but it does not include a copy of the detailed budget. Why?

The budget summary will print if the Grant Maker has elected it to be included in the single print. If the Grant Maker has not elected to have it printed with the single print it will not be included. If you wish to have a printed copy, you can use the **Print** button on the Budget Period Detail page.



When I press submit, does the application/LOI get submitted to the foundation or routed to my Grants & Contract office to approve?

Clicking the Submit button sends the application directly to the Grant Maker. If a signature is required you will not be able to submit until the signature is completed.

I uploaded files in the Attachment section of my application, but they are not printing when I click on the Signature Pages. Why?

There are a few reasons why a file may not show/print when the **Print Signature Pages and Attached PDF Files** button is clicked:

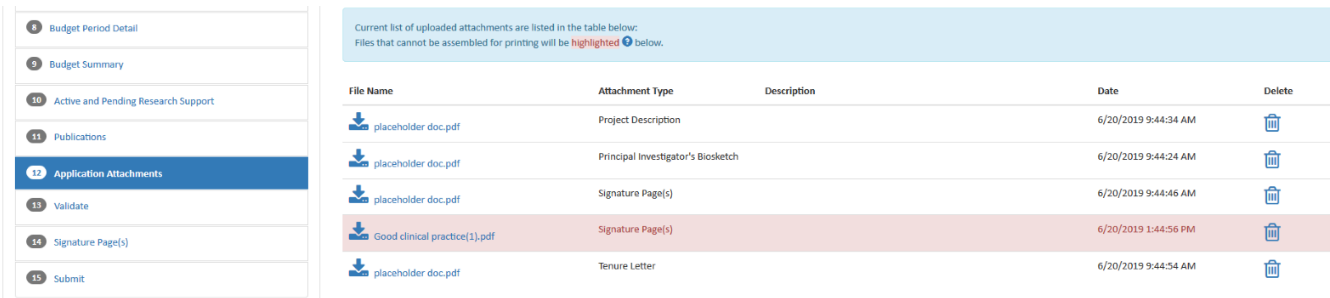
1. Only Word and PDF files are included in this function. If the excluded file is NOT a Word or PDF file (e.g. excel, jpegs, etc.), that is the reason. There's nothing more you need to do; the Grant Maker is aware that only Word and PDF files are included. (Note – The Grant Makers have access to the other files after you submit.) If it is a Word or PDF file, proceed to #2.

2. 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 #3.

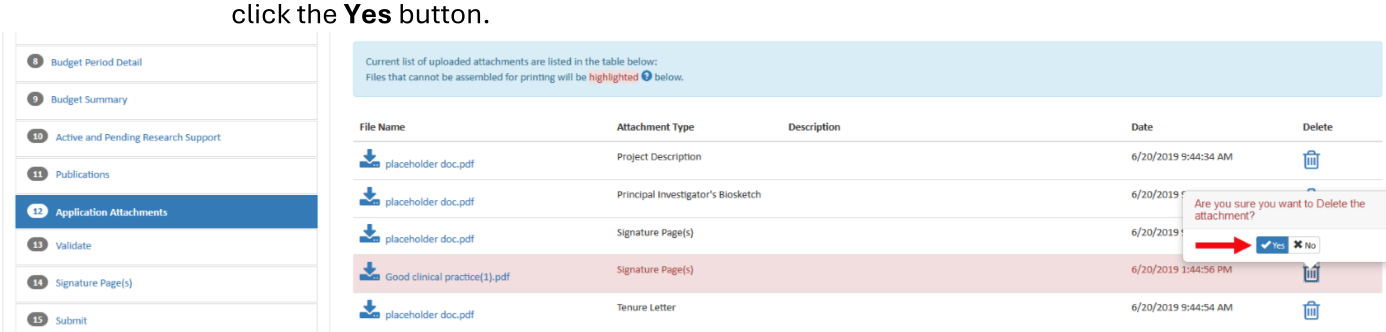
3. There may be an error with the file uploaded. The two most common errors are corrupted or password protected files. The way to correct this is to remove the file that has errors, regenerate the PDF, and then upload again. To do this:

a. Go to the application section where you uploaded the files. ProposalCentral may have been able to identify the file with the error. If so, the file is highlighted in red. Please note that not all files with errors are shown in red.

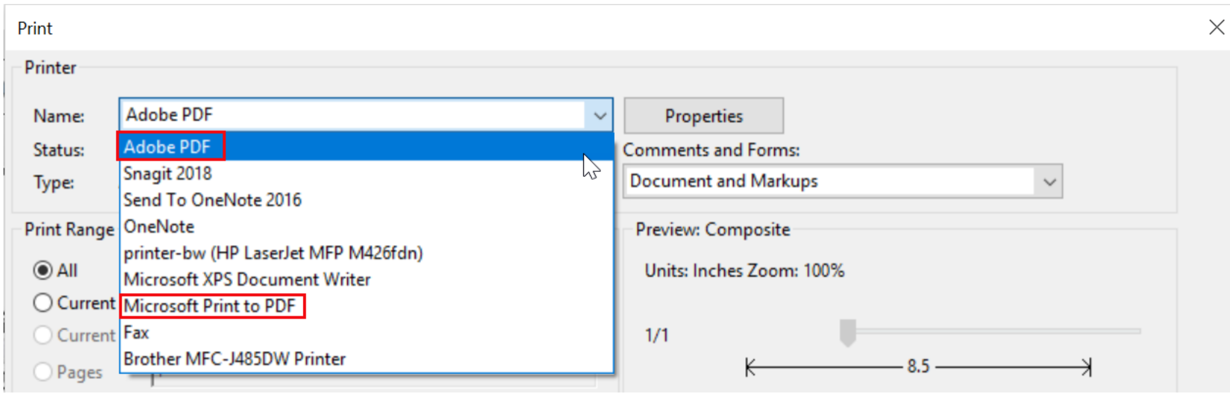


b. Click the "Delete link" next to the file that was NOT included when you clicked the **Print Signature Pages and Attached PDF Files** button. (Reminder, you may be deleting a file that is not highlighted in red.)

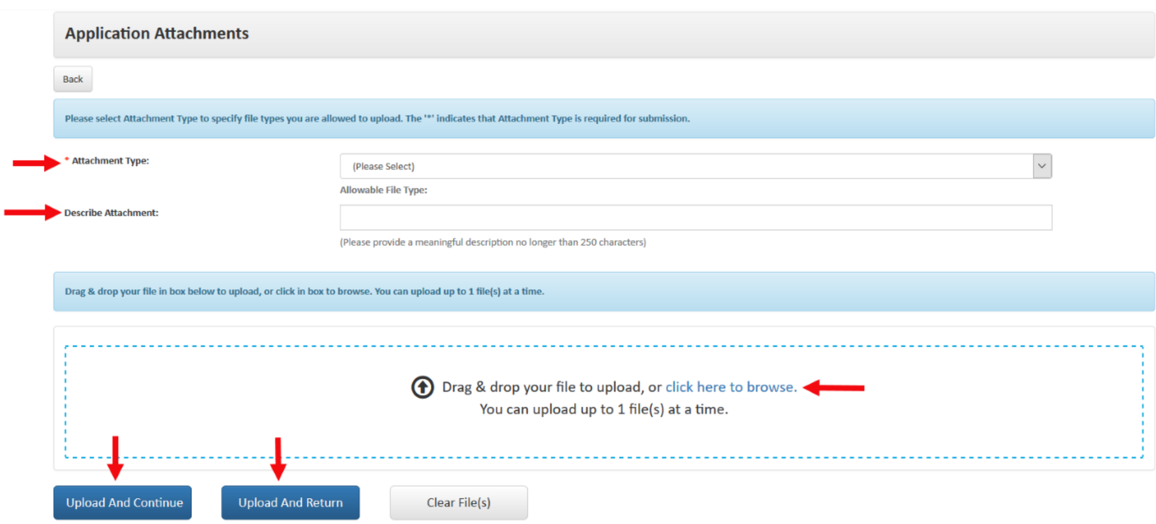
c. You are prompted to confirm you want to proceed with deleting that file, click the **Yes** button.



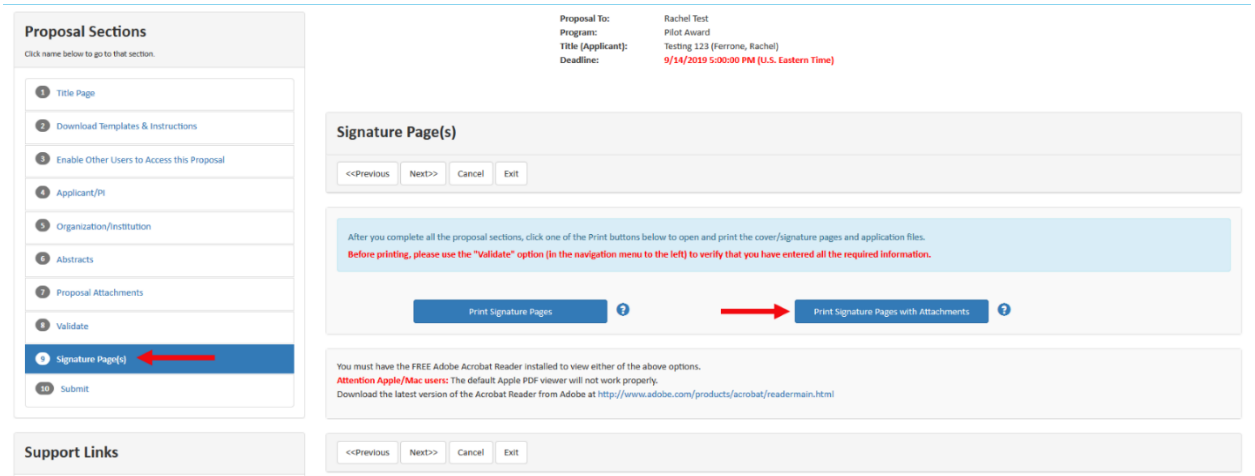
d. Open the original file using either Adobe Professional or Adobe Reader. When you print the file, select the respective .pdf converter tool from the printer dialog box “Name” drop-down menu and click the **Print** button. Save the new file that is created.



e. Return to the application section where you previously uploaded the files. Select the appropriate Attachment Type, provide a description (optional), browse to locate the file on your computer and then click the **Upload Attachment** button.



f. After the file is uploaded, return to the section of the application to generate the PDF and click the **Print Signature Pages and Attached PDF Files** button. The file you replaced should now appear.

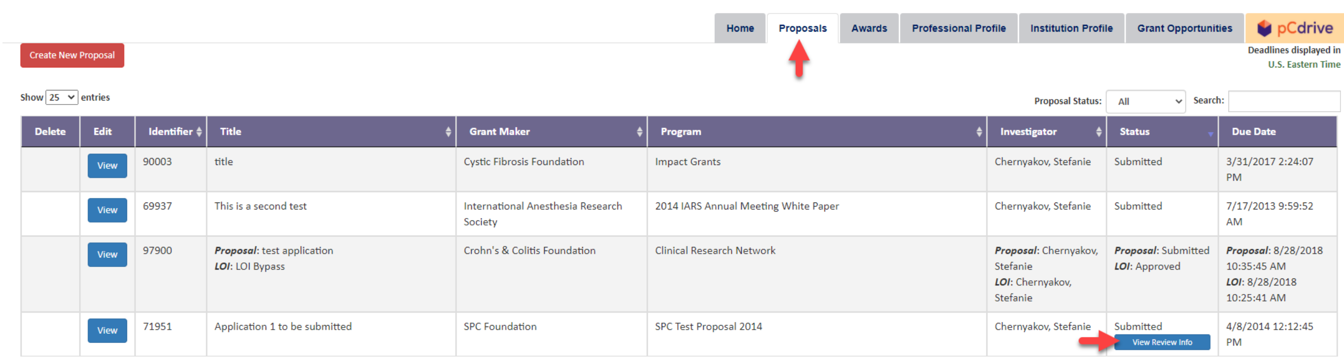


4. If # 1 and 2 don't apply to your situation and #3 does not resolve the issue, contact pcsupport@altum.com for assistance.

I submitted an application and was notified that I was not funded. Can I find out why?

If the Grant Maker has made the review/critique information available, access it by:

1. Going to https://proposalcentral.com/ and login under the "Application Login" section.
2. Clicking on the "Proposals" tab and then selecting "All" from the "Proposal Status" drop-down menu.
3. Clicking the **"View Review Info"** button next to the appropriate application.



If the page you are directed to states there are no reviews available or Summary Statements entered, then the Grant Maker has not supplied the information yet. Contact them to find out more information.

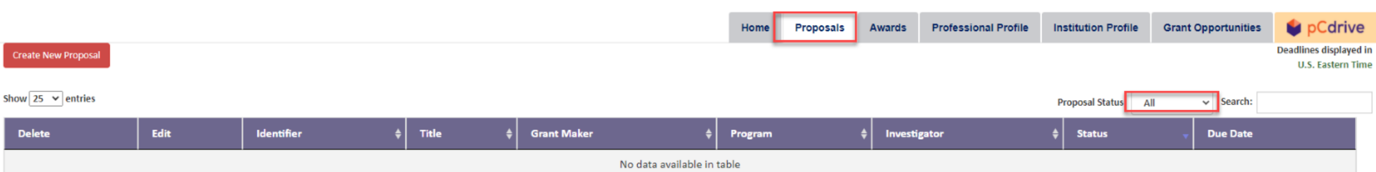
You can e-mail the Grant Maker by clicking the **View** button next to the application and then clicking the "Email to Program Admin" link found in the gray menu on the left.

Application Process (Non-PI)

The PI gave me access to an application but when I log in, I do not see it. Why?

First, make sure you are logging in to the right place:

1. Go to https://proposalcentral.com and log in under the "Application Login" section.
2. Click on the Proposals tab and then the default **ALL** status in the Proposal Status drop-down menu.



If you do NOT see the application listed, there are two possibilities:

- Option 1: You have multiple accounts in ProposalCentral and the PI gave you access under a different account. To determine if this is the case, click the Professional Profile tab and then Section 11 "Account Information" in the menu on the left. On that screen are the e-mail address(es) affiliated with this account. Contact the PI to see if the e-mail address used matches one that you see. If it does, proceed to Option 2. If it does NOT match any of the address(es), there are two options:
    - Ask the PI add access to the application using one of the e-mail addresses indicated. Or,
    - Click the "Logout" link in the upper right and then click "Forgot Your Username/Password?" under the "Application Login". Enter the e-mail address that the PI used. This sends an e-mail to that address with a link to set your password. Please note that this only works if you have access to e-mail messages sent to that e-mail address. If you don't but it was a valid e-mail for

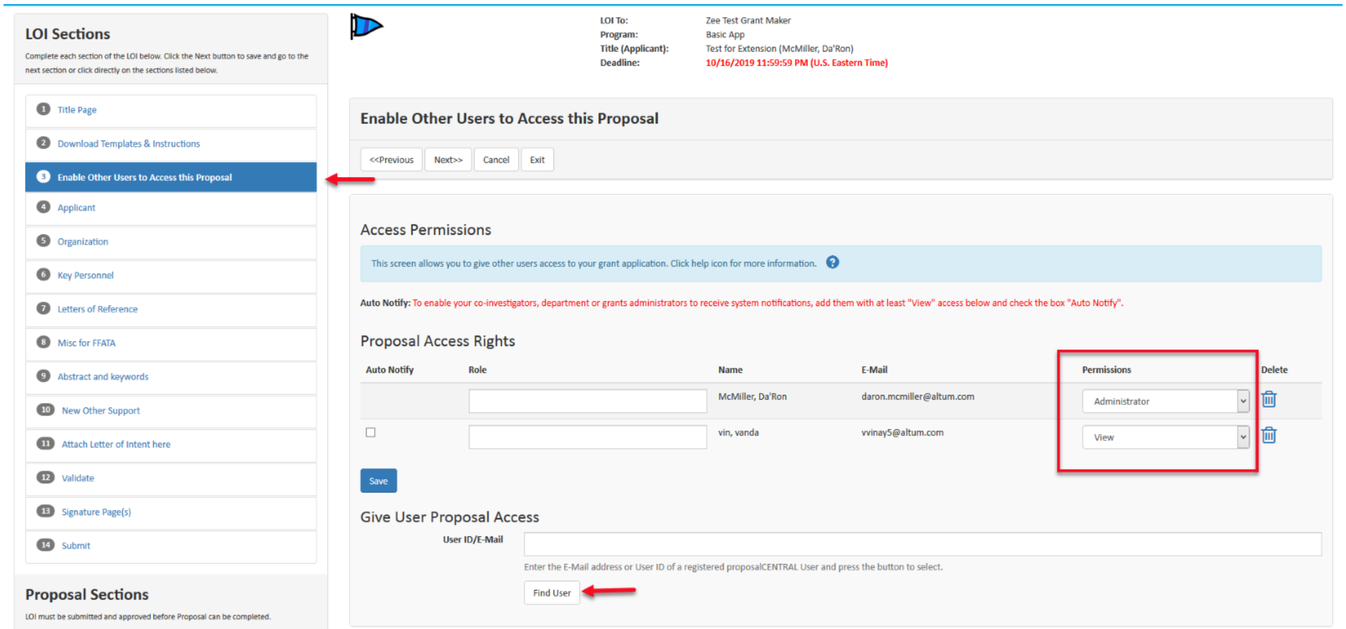
you (e.g. it's an e-mail from your last position), contact Customer Support for assistance.

Note – If you have multiple accounts, Altum recommends consolidating them. This preserves all information under a single account and prevents confusion when accessing. For more information on how to merge accounts please see the "I think I have multiple accounts on ProposalCentral. Can they be combined?" question above.

- Option 2: If the e-mail address the PI used matches one of the e-mail addresses in your account, it is possible that the PI included your account information as a listed contact for key persons or organizational officials but did NOT specifically provide you access. In ProposalCentral it is possible for a PI to indicate someone is part of an application without giving access to the application.

The PI can provide you access by:

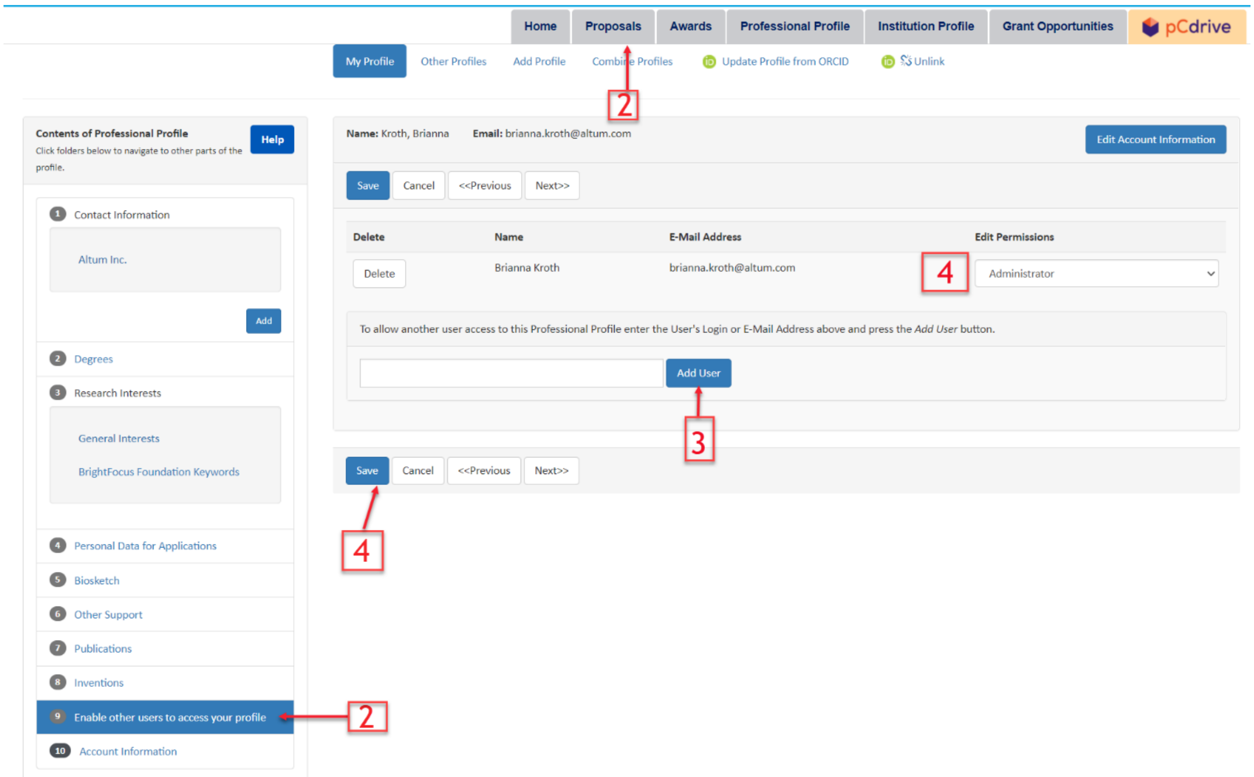
1. Going to https://proposalcentral.com/ and logging in under the "Application Login" section.
2. Clicking the Proposals tab and the **Edit** button next to the appropriate application.
3. Clicking the "Enable Other Users to Access this Proposal" section in the menu on the left.
4. Adding your e-mail address at the bottom and clicking the **Find User** button.
5. Selecting the appropriate access level from the drop down in the "Permissions" column and clicking the **Accept Changes** button. The possible access levels are:
    - View: View only. Cannot change any details.
    - Edit: Can view and change information in the application. Cannot submit the application or view the "Enable Other Users to Access this Proposal" screen.
    - Administrator: Can view, edit and submit the application. Can give access rights to others on the "Enable Other Users to Access this Proposal" section.



How do I update the PI's details? I have access to the application but don't see a way to update the PIs information in the applicant/PI section of the application.

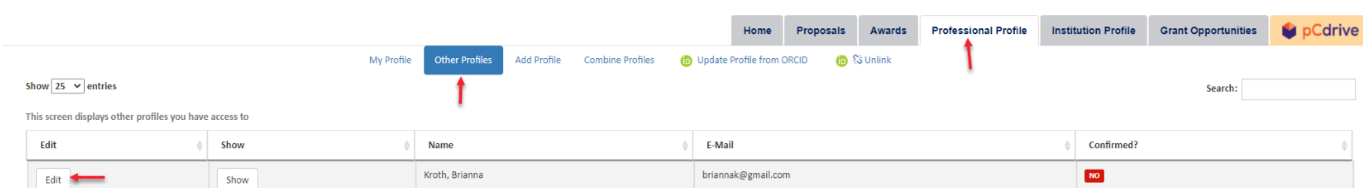
The PI must explicitly provide some access to their profile for that person to be able to update it. If you do not have access to the PI's profile, use the following instructions to allow you access to their profile:

1. Go to https://proposalcentral.com/ and login under the "Application Login" section.
2. Click the Professional Profile tab and then click the "Enable other users to access your profile" link in the gray menu on the left.
3. Add the e-mail address of the person who should have access to your profile and click the **Add User** button.
4. Once the person has access, select the appropriate access level in the "Edit Permissions" column and then **Save**. Here is a description of each access level:
    - View: View only. Cannot change any details.
    - Edit: Can view and change information in the profile. Cannot give other users access to the profile.
    - Administrator: Can view and change information in the profile. Can give other users access to the profile.



Once the PI has provided access to their profile, update it using the following steps:

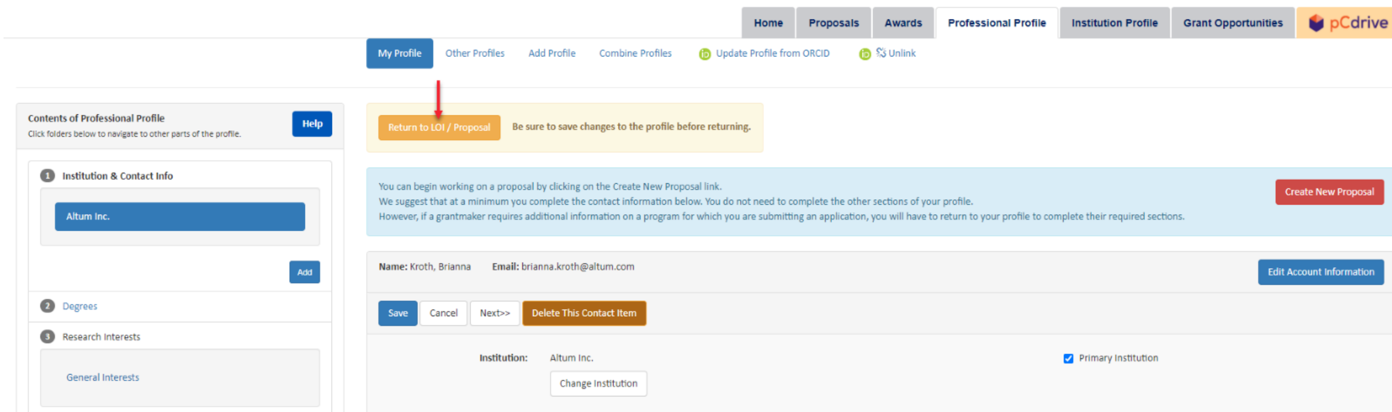
1. Go to https://proposalcentral.com/ and login under the “Application Login” section.
2. Click the Professional Profile tab and then click on **Other Profiles**.
3. Click the **Edit** link next to the PI’s name. That returns the PI’s profile and you can update information. Remember to click the **Save** button to retain your changes.



Additionally, you can update the PI’s profile from within the application by:

1. Going to https://proposalcentral.com/ and logging in under the “Application Login” section.
2. Clicking on the Proposals tab and the **Edit** button next to the appropriate application.

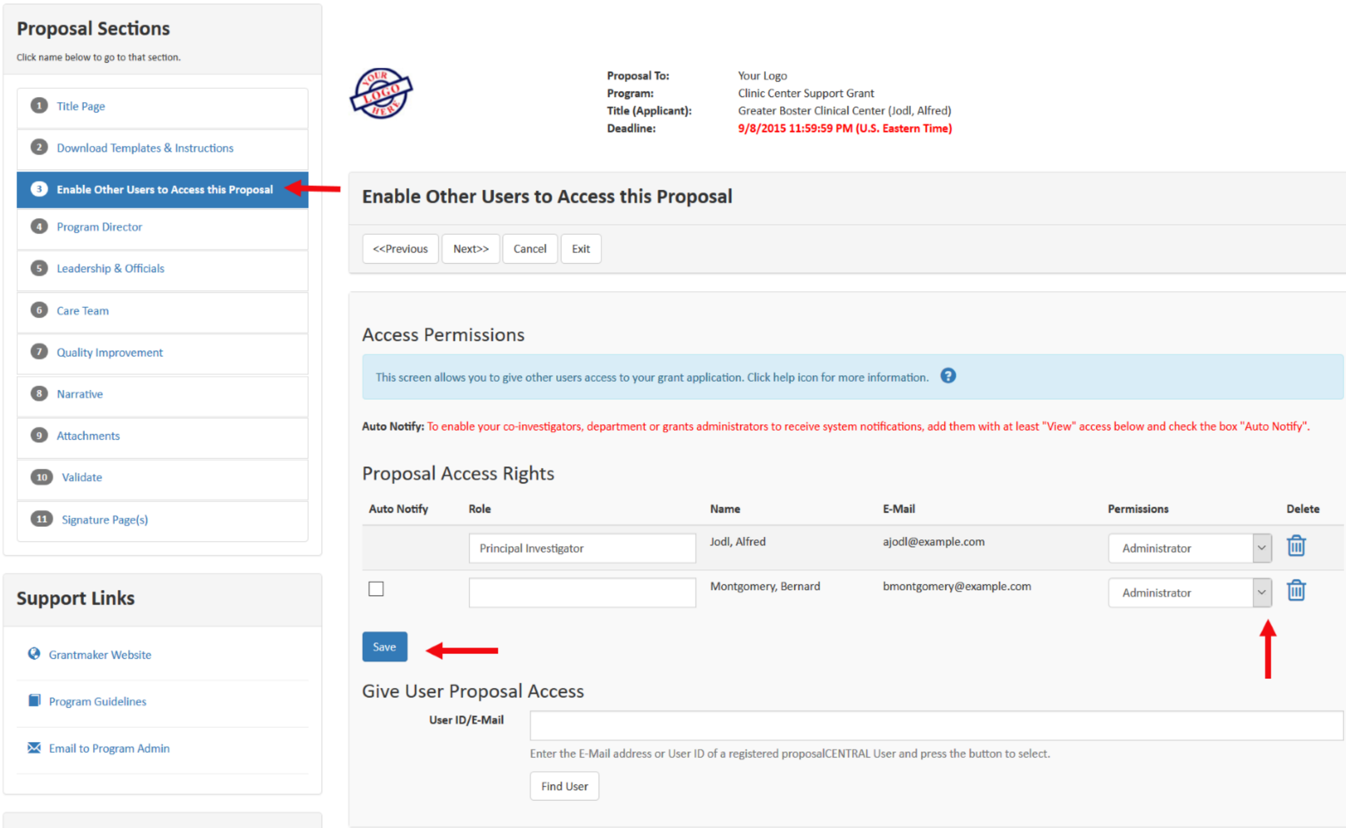
3. Going to the section of the application that is pulling information from the PI’s profile and clicking the **Edit Professional Profile** button. This re-directs to the PI’s profile. From there you can make changes. When done, click the **Return to LOI/Proposal** button at the top of the PI’s profile. If you returned to the page showing the PI’s contact information in the application, make sure to click **Save** on that page to refresh the page with the updates to the profile.



I have access to the PI's application, but I am not able to make any changes. Why?

There are different levels of access to an application, including “View”. If the PI provided “View” access, you are not be able to make any changes. If you would like to make changes, you must ask the PI to change your access level. The PI can do this by:

1. Going to https://proposalcentral.com/ and login using the “Application Login”.
2. Clicking the Proposals tab and clicking **Edit** next to the proposal.
3. Selecting either “Edit” or “Administrator” from the drop-down menu in the “Permissions” column for your account and clicking the **Save** button.

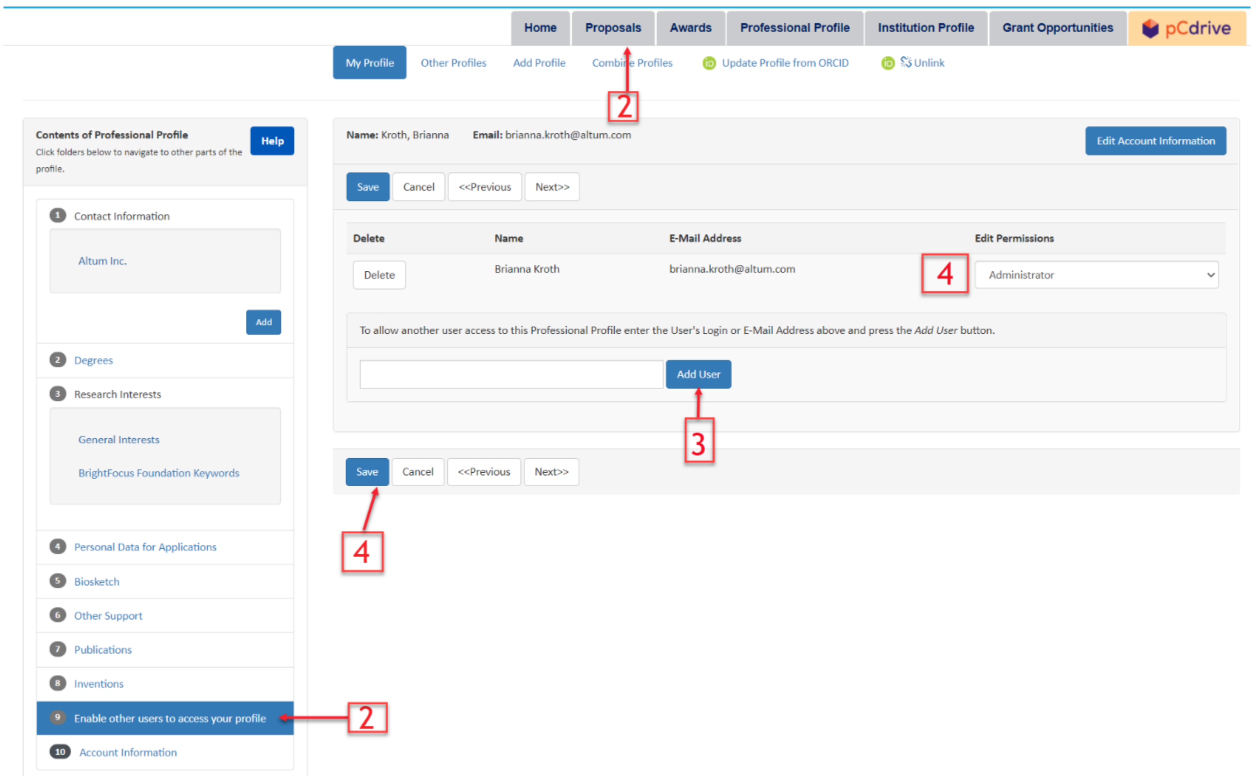


I cannot complete the Publications (or Other Support) section for my Principal Investigator even though I have "Administrator" access to the application. Why?

Only users that have access to the PI's Professional Profile can update the Publications and Other Support stored in the PI's profile. The PI must explicitly provide access to their profile for that person to update their profile. If you do not have access to the PI's profile, they can use the following instructions to allow you access to their profile:

1. Go to https://proposalcentral.com/ and login under the "Application Login" section.
2. Click the Professional Profile tab and then the "Enable other users to access your profile" link in the gray menu on the left.
3. Add the e-mail address of the person who should have access to your profile and click the **Add User** button.
4. Once the person has access, select the appropriate access level in the "Edit Permissions" column and then click the **Save** button. Here is a description of each access level:
    - View: View only. Cannot change any details and therefore cannot update Publications and Other Support.

- Edit: Can view and change information in the profile. Cannot give other users access to the profile and therefore can update Publications and Other Support.
- Administrator: Can view and change information in the profile and therefore can update Publications and Other Support. Can also give other users access to the profile.



For more information on adding Other Support please refer to the "How to Add Other Support" tutorial.

I started an application, but I am not the PI. How do I change the PI on the application?

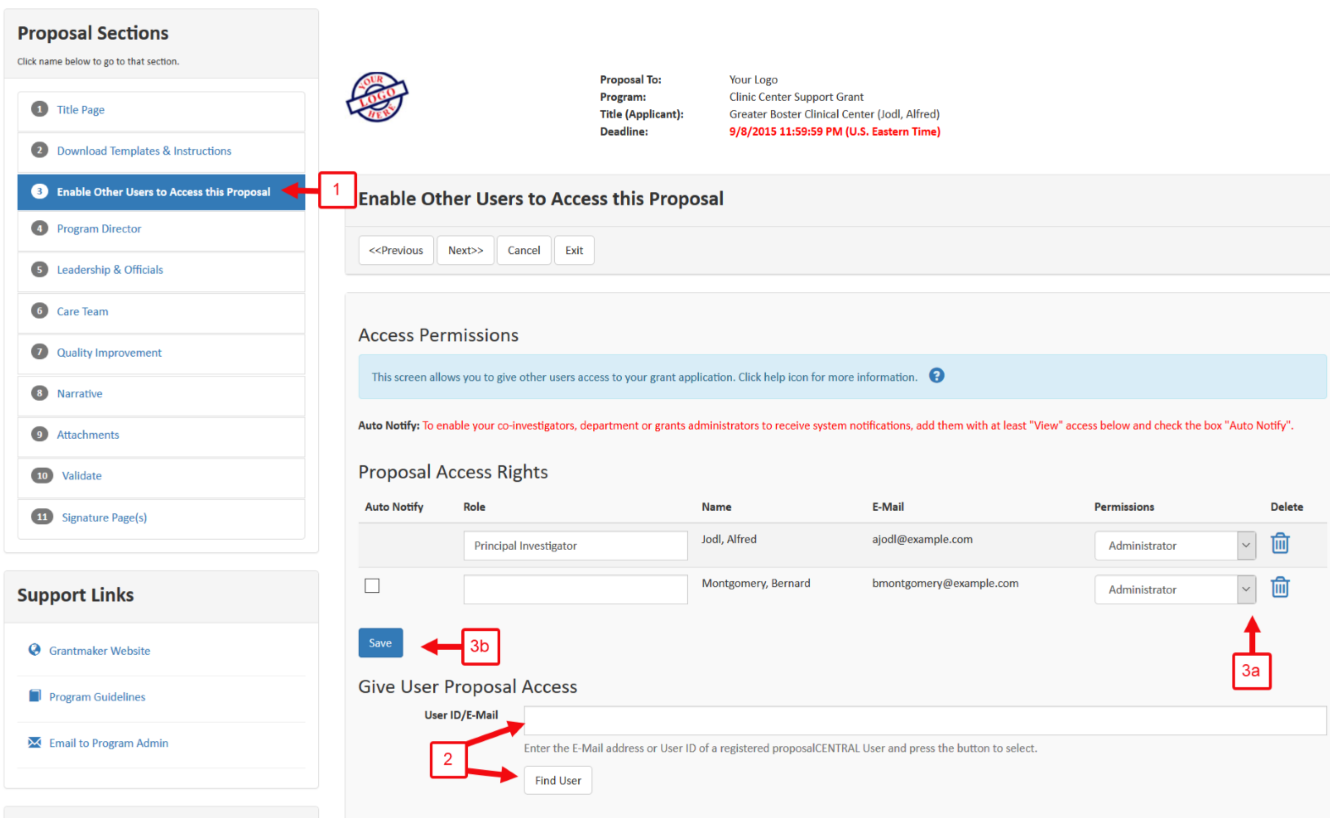
First, the PI must have an account in ProposalCentral. If they have an account already, skip to the next section below. If they do not, send the PI to register by:

1. Go to https://proposalcentral.com/ and click the **Need an account?** link below "Application Login".
2. Provide the information requested. An e-mail will be sent with a confirmation number. Open the e-mail and copy the confirmation number.

3. Return to https://proposalcentral.com/ and login under the “Application Login” section by providing the username and password you created in Step 2.
4. Paste the confirmation number and click the **Submit Confirmation Number** button.
5. Enter profile information (e.g. affiliated institution, address, phone number, etc.) Most Grant Makers require this information in an application and once saved in a professional profile, it carries over into any application started on ProposalCentral.

Second, once the PI has an account, you must give the PI “Administrator” access to the proposal in the “Enable Other Users to Access this Proposal” section. To do this:

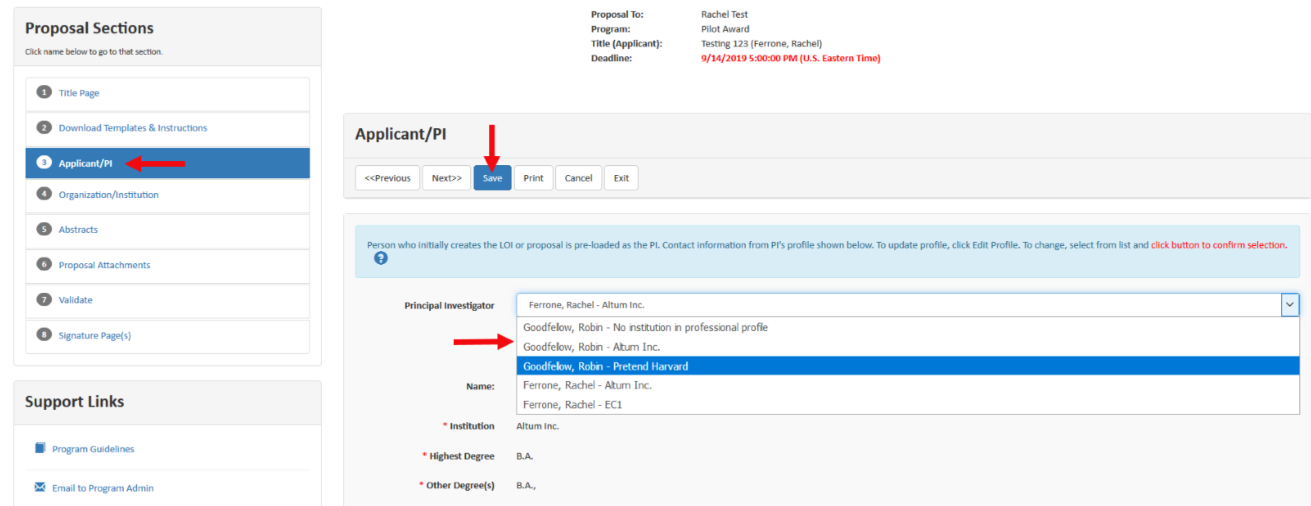
1. In the application click the “Enable Other Users to Access this Proposal” section in the gray menu on the left.
2. Add the PI’s e-mail address at the bottom and click the **Find User** button.
3. Once added, select the “Administrator” permission in the “Permissions” column (3a) and click the **Save** button(3b).



Finally, now that the PI has access, the PI must:

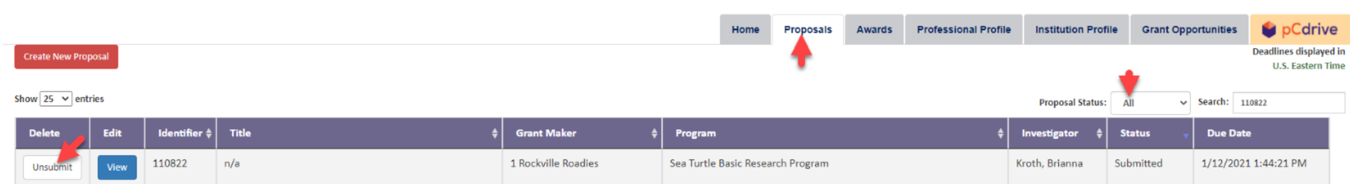
1. Go to https://proposalcentral.com/ and login below “Application Login”.
2. Click on the Proposals tab.
3. Click the **Edit** button next to the proposal.

4. Within the application, the PI needs to go to the Applicant/PI section, select their name from the drop down, and click the **Save** button. Please note that the "Applicant/PI" section may be named something different depending on the Grant Maker.



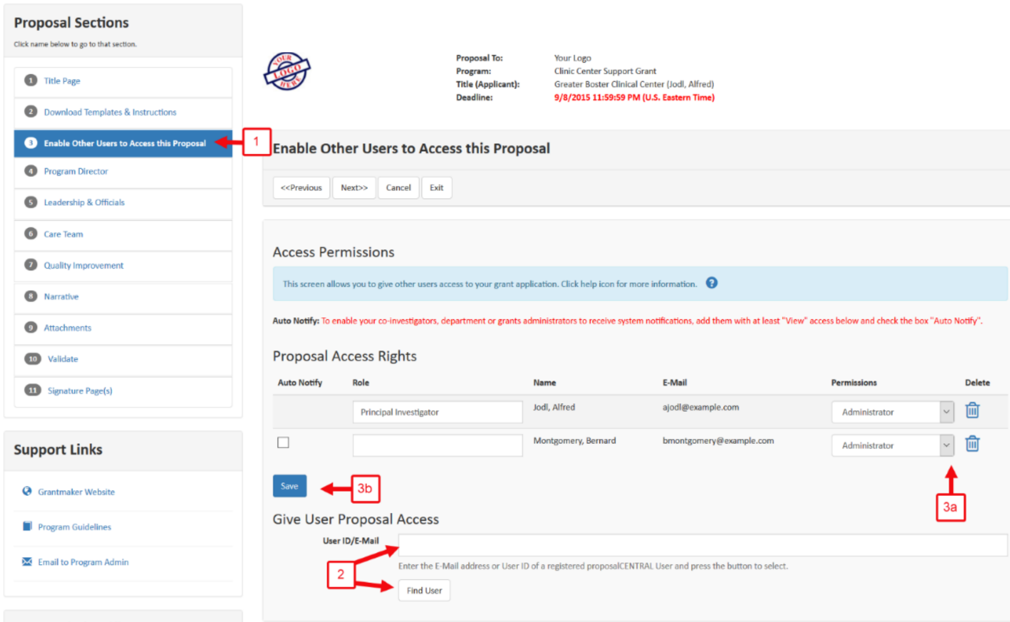
I need to approve the application for a PI. They told me they submitted it, but I don't seem to have it. How can I approve it to submit to the foundation?

If the PI submitted the application, it has already been sent to the Grant Maker. If the PI should have had your approval before submitting, they can unsubmit the application if it is before the deadline and the Grant Maker has not started the review process. The PI can un-submit by clicking the "Unsubmit" button as shown in the screenshot below and then click the **OK** button to proceed with un-submitting.



Once the PI has unsubmitted the application, the PI may provide access by accessing the proposal and completing the following steps:

1. Clicking the "Enable Other Users to Access this Proposal" section in the gray menu on the left.
2. Adding your e-mail address at the bottom and clicking the **Find User** button.
3. Once you are added, selecting "Administrator" from the drop down in the "Permissions" column and clicking the **Save** button. Only a user with Administrator permission is allowed to submit the application.



After your review, if you would like to submit the application, you must proceed to the Submit section found in the menu on the left and then click the **Submit** button. You will ONLY be able to submit if it's before the deadline and all requirements have been met.