proposalcentral

FAQ

Awardees

altum

Contents

Post Award

I need to upload a Progress Report to a PI's record but when I log in to ProposalCentral, I do not see the award. Why?

To upload a report, you need to have "Edit" or "Administrator" permissions for the grant. The Principal Investigator (PI) can grant you access by following these steps:

1. Visit https://proposalcentral.com/ and log in under the "Application Login" section.
2. Click on the "Awards" tab and select the Award Identifier or Title link for the appropriate grant.
3. Navigate to the "Contacts" tab and add the appropriate email address twice, then click the "Add Award Contact" button.

4. Select the contact type (e.g., Key Person), enter the role (e.g., Collaborator), and click the **Save & Close** button at the bottom.

5. Select the appropriate access level from the drop-down in the "Permissions" column and click the **Save Changes** button. The possible access levels are:
- View: View only. Cannot change any details and therefore will NOT be able to submit a report.
- Edit: Can view and change information in the grant. However, they 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.

After the PI has granted you access, you can access their award by:
1. Visiting https://proposalcentral.com/ and logging in under the "Application Login" section.
2. Clicking on the red Awards tab and then clicking either the Identifier number or Title link next to the appropriate grant.
3. Click the Deliverables Tab to submit a report.

I have attached the deliverable to the record but there was no Save button. Has the document been uploaded?

If you have successfully uploaded a file, you will see Replace (Replace), View (🔍), and Delete (🗑) icons for the item. Please note that the "Edit Status" column refers to the grant maker marking a deliverable as "Final." In some cases you will only see the View button listed above if the Deliverable is submitted as the Grant Maker has elected to not allow deletion or replacements, after the Deliverable is submitted.

Due Date	Deliverable Type	Type Description	Deliverable Description	Date Submitted/User	Add	View	Delete	Edit Status
07/01/2018	Awardee Photograph	Please upload a recent photograph			📤			
01/01/2019	Annual Financial Status Report	Please download the associated template and upload it back into your schedule.			📤			
07/01/2019	Progress Report	Progress Report			✏️			
07/01/2019	Annual Financial Status Report	Please download the associated template and upload it back into your schedule.			📤			
08/01/2019	Progress Report	Progress Report			✏️			
01/01/2020	Annual Financial Status Report	Please download the associated template and upload it back into your schedule.	Please download the associated template and upload it back into your schedule.	06/20/2019 (Ferrone, Rachel)	📤 Replace	🔍	🗑️	
07/01/2020	Progress Report	Progress Report			✏️			
07/01/2020	Annual Financial Status Report	Please download the associated template and upload it back into your schedule.			📤			
07/01/2020	Final Progress Report	please upload a final report			📤			

I cannot complete the Publications (or Other Support) section for my Principal Investigator even though I have administrator access to the award. 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 the 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.
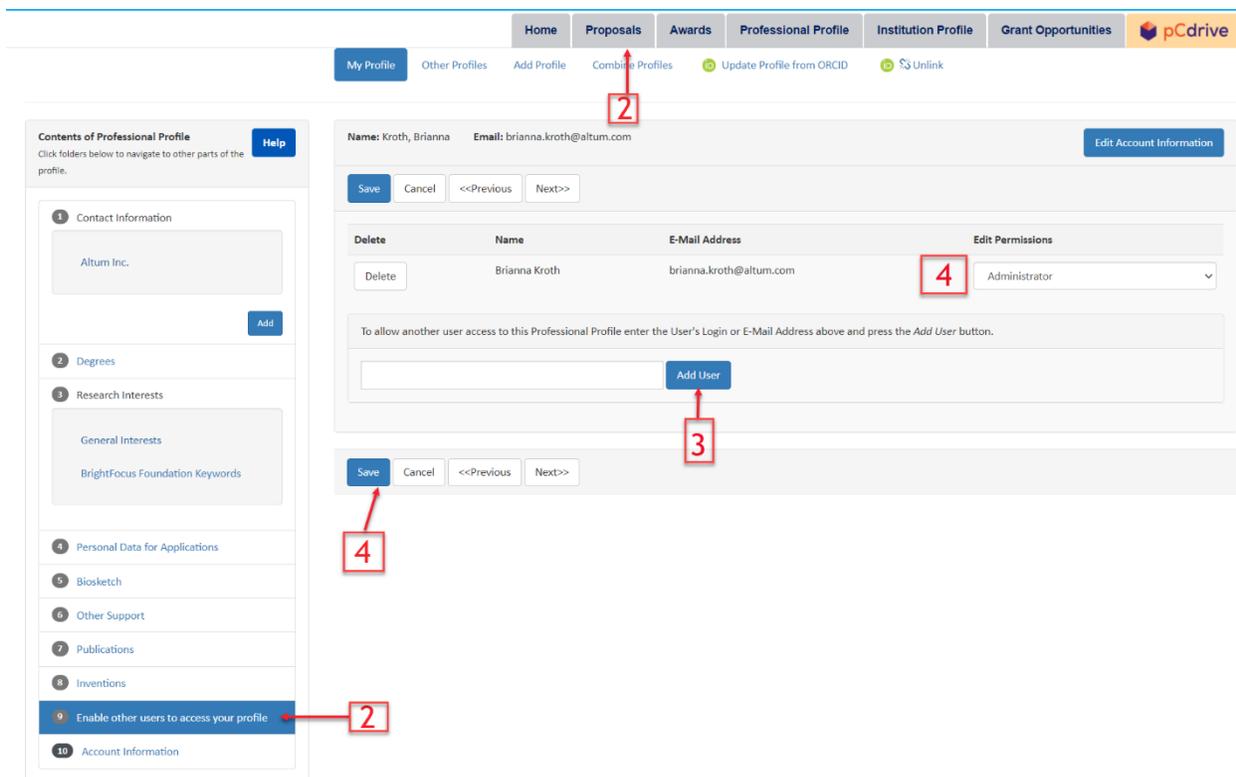
For more information on adding Other Support please refer to the "How to Add Other Support" tutorial.

The original PI has left our institution, so we need to reflect this on the award. How do I update the record?

To change the Principal Investigator on a grant, you must contact the Grant Maker. They can provide information about their process for handling PI change requests.

I'm a PI on a grant and have moved to a new institution. How do I make this change on my award?

To change the lead institution on a grant, you must contact the grant maker. They can provide information about how they handle change of institution requests.

You can send correspondence to the grant maker by:

1. Going to https://proposalcentral.com/ and logging in under the "Application Login" section.

2. Clicking on the Awards tab and clicking either the Identifier number or Award Title link for the appropriate grant.
3. Clicking the Correspondence tab.
4. Clicking the Send Correspondence to Admin button.

5. On the next page, select the recipients and compose your message. Select recipients by checking the box next to their name. It is recommended that you only select the relevant individual(s).

6. If your grant has been assigned to a particular administrator(s), you'll be able to identify that individual(s). Most grant makers recommend that if your grant has been assigned to a specific administrator that you only select them. Here's an example of how it may appear if your grant is assigned to specific administrators:

After selecting the recipients, the other fields available include a CC (e.g. an administrative assistant or collaborator), subject and body of the e-mail. There is also an option to attach a file. When ready to send the e-mail, click the **Send E-Mail** button.

From Display Name:	Rachel Ferrone
From Email:	rachel.ferrone@altum.com
	All e-mails will be from the pcsupport@altum.com but will have your name, e.g. 'John Smith <pcsupport@altum.com>'.
	The e-mail address entered above will be used when the recipient replies to your e-mail.
CC:	
High Priority:	☐
Subject:	
Message:	

Attachment: ⊙
⊕ Drag & drop your file to upload, or click here to browse.
You can upload up to 5 file(s) at a time, and a total of 8MB.

Clear

Send E-Mail   Cancel

The PI gave me access to their award record so that I can upload a deliverable; however, I don't see an upload link. Why?

It's possible that the PI gave you "View" level access instead of either "Edit" or "Administrator" permissions. Only users with "Edit" or "Administrator" permissions can upload a report. The PI can change your access level by:

1. Going to https://proposalcentral.com/ and logging in under the "Application Login" section.
2. Clicking the awards tab.
3. Clicking either the Identifier number or Award Title links next to the appropriate grant.
4. Clicking the Contacts Tab.
5. Selecting either "Edit" or "Administrator" from the drop down in the "Permissions" column and clicking the **Save Changes** button. Here is the difference between the permissions:
   - Edit: Can view and change information in the grant. However, cannot make changes on the "Contacts & Users Access" screen.
   - Administrator: Can view, edit, and give access rights to others on the "Contacts & Users Access" section.

I am attempting to upload a deliverable but it says I don't have access to Post-Award. My PI says I should. How do I find the award?

If the PI granted you access to the award, you can access it by:

1. Going to https://proposalcentral.com/ and logging in under the "Application Login" section.
2. Clicking the Awards tab and clicking either the Identifier number or Award Title link for the appropriate grant.
3. Clicking the Deliverables tab.

If neither the Identifier Number nor Award Title are an active link, then either the PI did not grant you access, granted the wrong access level or granted access under a different account. Contact the PI to have the access level corrected and/or tell you which account they provided it under (they could have used a different e-mail address for you).

Here is how the PI corrects/confirms:

1. Go to https://proposalcentral.com/ and login under the "Application Login" section.
2. Click the Awards tab.
3. Click either the Identifier number or Award Title links next to the appropriate grant.
4. Click the Contacts & Users Access link.
5. Review the table showing the users who have access. IF your name IS included, see **a** and **b** below. IF your name IS NOT included, proceed to #6 instead.
    a. Check if the Permission Level is "Administrator" or "Edit". If it is already one of those, proceed to **b** below. If the access is "No Access", change it by selecting either "Administrator" or "Edit" from the menu and clicking the **Save Changes** button. With this change you are now able to access the grant.

    b. If the access was already at either "Administrator" or "Edit", they should provide the e-mail address showing in the "E-Mail" column. If it's a different e-mail address than the one associated with the account you were using, you have two options:

i. Combine the two accounts. Go to the "I think I have multiple accounts on ProposalCentral. Can they be combined" section for more information on how to do that.

ii. Login using the account they used. If you don't remember your username, you can login using your e-mail address instead. Your username and e-mail address can be used interchangeably. If you don't remember the password for the account and you:

1. **Have access to the e-mail**, go to https://proposalcentral.com and click the "Forgot Your Username/Password?" link. This sends an e-mail to that address with a link to set your password.

2. **Do NOT have access to that e-mail**, proceed with Option 1, merging accounts, by contacting Customer Support.

6. If your name is not showing on the table, they can provide access by:
    a. Adding your e-mail address twice and clicking the **Add Award Contact** button.

b. Selecting contact type (e.g. Key Person) and entering your role at the top (e.g. Collaborator) and clicking the **Save & Close** button at the bottom.

c. 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 and therefore will NOT be able to submit a report.
- 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.

If you have an AHA Award the instructions are below:

Below are the instructions for submitting the "Request Personnel Change" deliverable.

- Log into your ProposalCentral account at https://proposalcentral.com/
- From the Awards tab, click on the Award Identifier number to access the award record

- Click on the Deliverables tab, then click "Add Deliverable"

- Select "Request Personnel Change" from the Deliverable Type drop-down, then enter an optional short description (e.g. Change Financial Officer), then click "Save"

- From the list of deliverables, click the start button next to the "Request Personnel Change" deliverable

- Provide a justification/explanation for the request

  * **Please provide justification/explanation for your request.**

- Provide information for the new Award Contact

  First Name:
  (Max 250 characters)

  Last Name:
  (Max 250 characters)

  Academic Title/Position:
  (Max 250 characters)

  Role on the Project:
  (Max 250 characters)

  Effective Date:

- Click the "Save" button, then "Submit to Grant Maker As Final"

Your request will then be processed by the American Heart Association in the order that it was received, and ProposalCentral staff will not be able to provide status updates regarding your request. Please await a direct reply from the AHA team.

I was notified that my proposal status is now pre-award. I am supposed to upload deliverables to my award record but don't see it under my awarded link. Where is it?

Because your grant has now been marked as "Pre-Award", it will be found under your All or Awarded Proposal Status filter in the Proposals tab.

If you have been asked to upload deliverables to your record, you can do so by clicking on the Awards tab, then clicking on the Identifier.

This opens the award record where you will see a link for Deliverables.

How will I know if the grant maker/foundation has reviewed the deliverable?

To see this:

1. Go to https://proposalcentral.com and login under the "Applicant Login" section.
2. Click the awards tab and click either the Identifier number or Award Title for the appropriate grant and then click the Deliverables tab.
3. If there is a "Final" in the "Edit Status" column then the grant maker has reviewed it.

Please note that it is possible that the grant maker may have reviewed it but not marked it as final. To determine if this is the case, click the Correspondence tab at the top of the page. From the Correspondence page you can send the grant maker an e-mail by clicking the Send Correspondence To Admin button and following the instructions on sending an e-mail.

I am the Signing Official/Financial Officer for my institution. Why don't I see all the award records for my intuition?

The Principal Investigators (PIs) on the grants must provide access. PIs grant 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 the Identifier number or Award Title links next to the appropriate grant.
3. Clicking the Contacts Tab and Adding your e-mail address twice and clicking the **Add Award Contact** button.

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

5. 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.

If you have an AHA Award the instructions are below:

Below are the instructions for submitting the "Request Personnel Change" deliverable.

- Log into your ProposalCentral account at https://proposalcentral.com/
- From the Awards tab, click on the Award Identifier number to access the award record

- Click on the Deliverables tab, then click "Add Deliverable"

- Select "Request Personnel Change" from the Deliverable Type drop-down, then enter an optional short description (e.g. Change Financial Officer), then click "Save"

- From the list of deliverables, click the start button next to the "Request Personnel Change" deliverable

- Provide a justification/explanation for the request

    * **Please provide justification/explanation for your request.**

- Provide information for the new Award Contact

    First Name:
    (Max 250 characters)

    Last Name:
    (Max 250 characters)

    Academic Title/Position:
    (Max 250 characters)

    Role on the Project:
    (Max 250 characters)

    Effective Date:

- Click the "Save" button, then "Submit to Grant Maker As Final"

Your request will then be processed by the American Heart Association in the order that it was received, and ProposalCentral staff will not be able to provide status updates regarding your request. Please await a direct reply from the AHA team.

I need to upload a document that is not listed in the table of the Award Deliverables. Can I do this?

Yes, this can be done by:

1. Going to https://proposalcentral.com and logging in under the "Applicant Login" section.
2. Clicking the Awards tab and selecting the Active status under the "Award Status" drop-down menu.
3. Clicking the Identifier or Title link for the appropriate grant and then clicking the "Deliverables" tab.
4. Clicking the **Add Deliverable** button. If you do NOT see a pop-up, or another tab in your browser, please turn off your pop-up blocker.
5. Selecting the deliverable type, clicking the **Browse** button to select the file from your computer, providing a description, and clicking the **Save** button.

TIP: To access comprehensive instructions for grantees posted on ProposalCentral here.

I need to give (get) access to an award record but the "Contacts & User Access" link is grayed out. How can I add someone to the record?

Only users with "Administrator" access can add/remove other users' access to the grant. It is possible that the PI provided "Edit" level access instead of "Administrator". The PI can change your access level by:

1. Going to https://proposalcentral.com/ and logging in under the "Application Login" section.
2. Clicking on the Awards tab and then selecting the Active status under the "Award Status" drop-down menu.
3. Click the Identifier or Title link for the appropriate grant.
4. Clicking the "Contacts & Users Access" link. (Note – If the "Contacts & User Access" link is unavailable to the PI, contact the grant maker to have the person added. You can contact the grant maker by clicking the "Correspondence" tab and then click the "Send Correspondence to Admin" button.)
5. Selecting "Administrator" from the drop down in the "Permissions" column and clicking the **Save Changes** button.

Users are then able to add access for someone else by:

1. Clicking the Contacts Tab.
2. Adding the person's e-mail address twice and clicking the **Add Award Contact** button.

3. Selecting the contact's type (e.g. Key Person) and entering their role at the top (e.g. Collaborator) and clicking the **Save & Close** button at the bottom.

4. 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 and therefore will NOT be able to submit a report.
   - 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.

If you have an AHA Award the instructions are below:

Below are the instructions for submitting the "Request Personnel Change" deliverable.

- Log into your ProposalCentral account at https://proposalcentral.com/
- From the Awards tab, click on the Award Identifier number to access the award record

- Click on the Deliverables tab, then click "Add Deliverable"

- Select "Request Personnel Change" from the Deliverable Type drop-down, then enter an optional short description (e.g. Change Financial Officer), then click "Save"

Add & Upload Deliverable

Deliverable Type	Request Personnel Change ⌄
Deliverable Type Description	Request Personnel Change
Deliverable Description	
	Please provide a meaningful description for this deliverable

Save   Cancel

- From the list of deliverables, click the start button next to the "Request Personnel Change" deliverable

| 01/13/2022 11:59 PM | Request Personnel Change | | ☰ | Request Personnel Change | | ⊞ | | Due |

- Provide a justification/explanation for the request

* Please provide justification/explanation for your request.

- Provide information for the new Award Contact

First Name:

(Max 250 characters)

Last Name:

(Max 250 characters)

Academic Title/Position:

(Max 250 characters)

Role on the Project:

(Max 250 characters)

Effective Date:

- Click the "Save" button, then "Submit to Grant Maker As Final"

Save   Cancel

Submit to Grant Maker As Final

Your request will then be processed by the American Heart Association in the order that it was received, and ProposalCentral staff will not be able to provide status updates regarding your request. Please await a direct reply from the AHA team.

I am assigned a deliverable that includes ORCID authorization? What is this? How do I complete this?

This can be done by:

1. Going 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.
4. After this you can complete the Deliverable by navigating to the "Awards" tab and then click on the Identifier number. This will bring up your Award and you will need to click on the "Deliverables" tab.
5. Then, click on the "+" icon for the ORCID Authorization deliverable to access the deliverable.
6. Then, click on "Click Here to Authorize" and then click "Submit to Grant Maker as Final".

How do I delete a signature from a budget report which has not been submitted yet?

As an awardee, you may be required to submit a Revised Budget or an Expense Report by the grant maker. You may also find it necessary to make changes to those reports after you have signed them. To remove your signature, you can highlight it, hit your Delete button and then click on the "Save Signature" button again.

The result will be a clean signature field for you to enter your signature once revisions to the page have been completed.

Indicate any funds being carried forward from previous budget periods	

*Enter Electronic Signature 1: Assigned To : PI

Karen Barber   [1] [_____]   [Save Signature 1] [Save Signature and Submit]
                                                                                            [Save Signature 1]

*Enter Electronic Signature 2: *(At least one assignee must sign)* Assigned To : Institution Contact:Financial Officer

Jane Tewalt

Neal Wilkins

How do I respond to deliverable critique feedback?

As an awardee, you may be allowed or required to provide feedback to Deliverable Critiques. You may access the reviewer's deliverable critiques by navigating to your Deliverables tab within your award record.

Under the "Feedback" column, you will see a magnifying glass to view the deliverable critiques and provide your feedback.

Clicking the magnifying glass icon will open a screen that will look like the below screenshot. You may or may not have an Administrative Summary to respond to as well.

Once you have entered your response to the critiques/administrative summary, you may choose Save Response or Submit Response. Please make sure that you click the Submit Response button if you are done and have "Saved" your response.

Why is there a private deliverable for my award which I can't access?

As an awardee, you will see Deliverables listed on the Deliverables tab of your award. Grant Makers can choose to have "Private" deliverables assigned to specific roles within your scheduled deliverables.

As the awardee, you will see who the deliverable is assigned to, the deliverable name and the due date. However, if it is a private deliverable, you will not be able to access the deliverable or its contents. Only the user assigned to the user can do so.

Once the deliverable has been completed and submitted by the assignee, the status of the deliverable will change to *Submitted*.