

 **proposalcentral**

FAQ

Applicants

PREPARED BY
PROPOSALCENTRAL SUPPORT



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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?

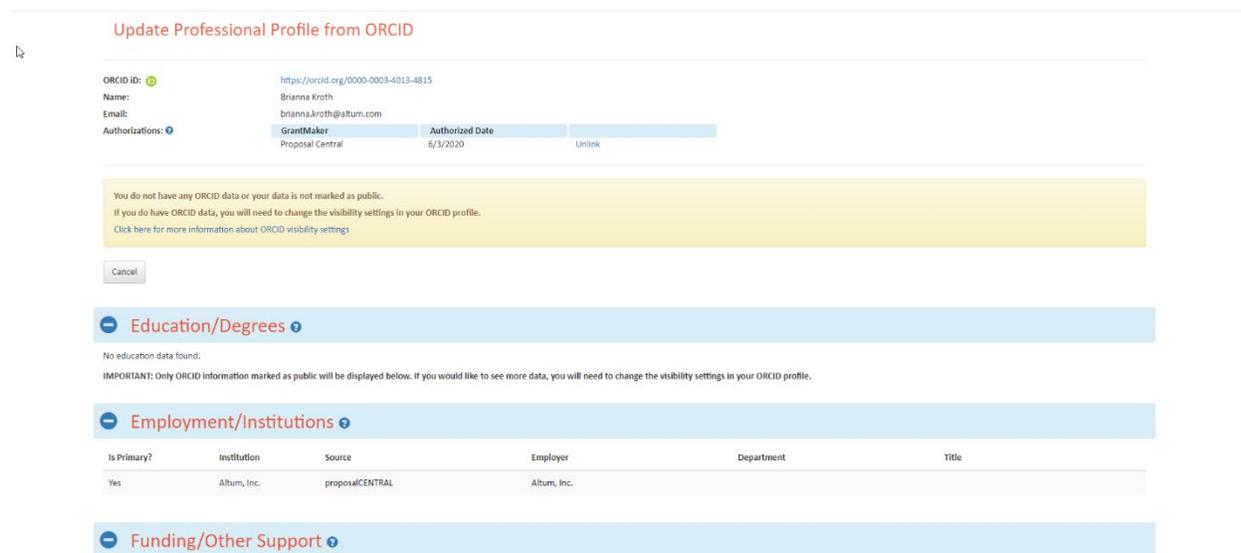
ORCID provides a persistent digital identifier (an ORCID ID) that you own and control, and that distinguishes you from every other researcher. You can connect your iD with your professional information — affiliations, grants, publications, peer review, and more. You can use your iD to share your information 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.

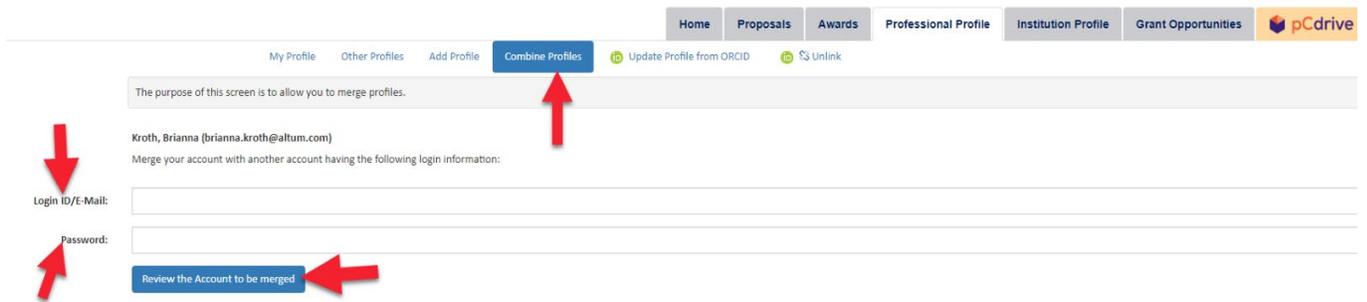


For more information regarding connecting your ORCID to ProposalCentral, please refer to the "How to Register as a ProposalCentral User" tutorial.

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

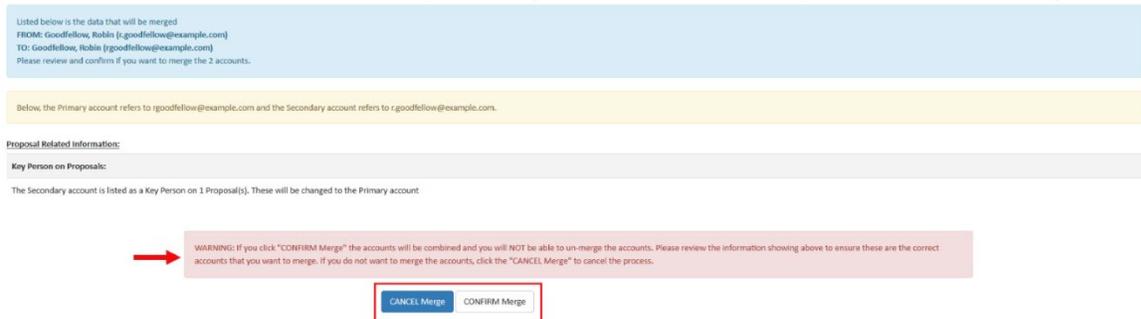
Yes, to do so:

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.



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.

The screenshot shows the 'Enable Other Users to Access this Proposal' interface. On the left, a 'Proposal Sections' sidebar lists 11 sections, with '3 Enable Other Users to Access this Proposal' highlighted and marked with a red box labeled '1'. The main content area includes a 'Proposal To:' section with details for 'Clinic Center Support Grant' and a deadline of '9/8/2015 11:59:59 PM (U.S. Eastern Time)'. Below this is an 'Access Permissions' section with a blue informational banner. The 'Proposal Access Rights' table lists two users: 'Principal Investigator' (Jodl, Alfred) and 'Montgomery, Bernard', both with 'Administrator' permissions. A 'Save' button is marked with a red box labeled '3b'. At the bottom, the 'Give User Proposal Access' section has a text input field for 'User ID/E-Mail' and a 'Find User' button, with a red box labeled '2' pointing to the input field. A red box labeled '3a' points to the 'Delete' icon in the second row of the table.

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.

The screenshot shows the 'Proposals' tab in the system. A navigation bar at the top includes 'Home', 'Proposals', 'Awards', 'Professional Profile', 'Institution Profile', 'Grant Opportunities', and 'pCdrive'. Below the navigation bar, there is a 'Create New Proposal' button and a 'Show 25 entries' dropdown. A table displays proposal details. The first row is highlighted, and the 'Unsubmit' button in the 'Delete' column is marked with a red arrow. The table data is as follows:

| Delete | Edit | Identifier | Title | Grant Maker | Program | Investigator | Status | Due Date |
|----------|------|------------|-------|---------------------|-----------------------------------|----------------|-----------|----------------------|
| Unsubmit | View | 110822 | n/a | 1 Rockville Roadies | Sea Turtle Basic Research Program | Kroth, Brianna | Submitted | 1/12/2021 1:44:21 PM |

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.

Proposal Sections
Click name below to go to that section.

- 1 Title Page
- 2 Download Templates & Instructions
- 3 **Enable Other Users to Access this Proposal**
- 4 Program Director
- 5 Leadership & Officials
- 6 Care Team
- 7 Quality Improvement
- 8 Narrative
- 9 Attachments
- 10 Validate
- 11 Signature Page(s)

Support Links

- Grantmaker Website
- Program Guidelines
- Email to Program Admin

Proposal Information

Proposal To: Your Logo
Program: Clinic Center Support Grant
Title (Applicant): Greater Boster Clinical Center (Jodi, Alfred)
Deadline: 9/8/2015 11:59:59 PM (U.S. Eastern Time)

Enable Other Users to Access this Proposal

<<Previous Next>> Cancel Exit

Access Permissions

This screen allows you to give other users access to your grant application. 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 | E-Mail | Permissions | Delete |
|--------------------------|------------------------|---------------------|-------------------------|---------------|--------|
| <input type="checkbox"/> | Principal Investigator | Jodi, Alfred | ajodi@example.com | Administrator | |
| <input type="checkbox"/> | | Montgomery, Bernard | bmontgomery@example.com | Administrator | |

Save

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.

Find User

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.

← Awards | Award Details | Deliverables | Budget | **Contacts** | Payments | Correspondence | Abstracts - Keywords | Research Subjects | Outcomes

| | | | |
|-------------------------|-------------------------|---------------|------------------------|
| Grantee | Ferrone, Rachel | Award ID | 96922 |
| Institution | Pretend Harvard | Program | New Idea Award (w/LOI) |
| Award Amount | \$500,000.00 | Project Title | Sample Award Record |
| Award Start - Award End | 07/01/2018 - 07/01/2020 | | 49% |
| Paid | \$62,500.00 | | 12% |
| Spent | \$0.00 | | 0% |
| Proposal ID | 96922 (pC ID) | | |

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 entries Search:

| Del | Auto Notify | Name | Contact Type | Role | E-Mail | Phone | Permissions |
|-------------------------------------|--------------------------|-------------------|---------------------|---------------|--------------------------|--------------|---------------|
| | <input type="checkbox"/> | Rachel E. Ferrone | PI | PI | rachel.ferrone@altum.com | 555-555-5555 | Administrator |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | Robin Goodfellow | Institution Contact | administrator | rgoodfellow@example.com | 777-777-7777 | Administrator |

Showing 1 to 2 of 2 entries Previous Next

[Save Changes](#)

Add Award Contact

Enter E-Mail Address

Confirm E-Mail Address

[Add Award Contact](#)

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

Add Contact

A user with this e-mail address is already registered with proposalCENTRAL. The information displayed below is from the user's profile. If any of the information below is missing or incorrect, please contact the user and have them update their profile.

[← Back to Award Contacts](#)

Auto Notifications

Contact Type/ Role

Type

* Role

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 entries

Search:

| Del | Auto Notify | Name | Contact Type | Role | E-Mail | Phone | Permissions |
|-------------------------------------|--------------------------|-------------------|---------------------|---------------|--------------------------|--------------|---------------|
| | <input type="checkbox"/> | Rachel E. Ferrone | PI | PI | rachel.ferrone@altum.com | 555-555-5555 | Administrator |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | Robin Goodfellow | Institution Contact | administrator | rgoodfellow@example.com | 777-777-7777 | Administrator |

Showing 1 to 2 of 2 entries

Save Changes

Previous

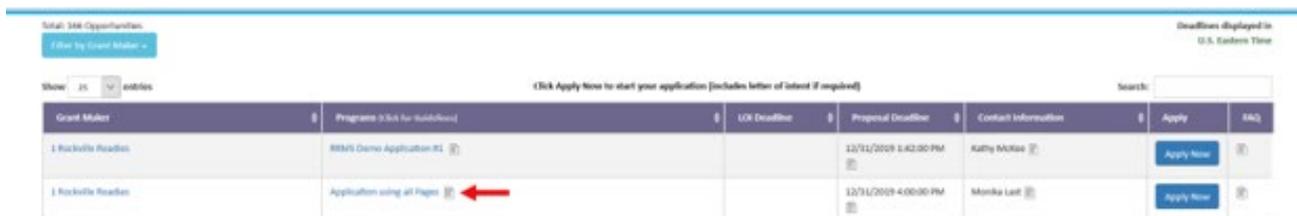
- Administrator
- Administrator
- Edit
- No Access
- View

Application Process (PI)

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.

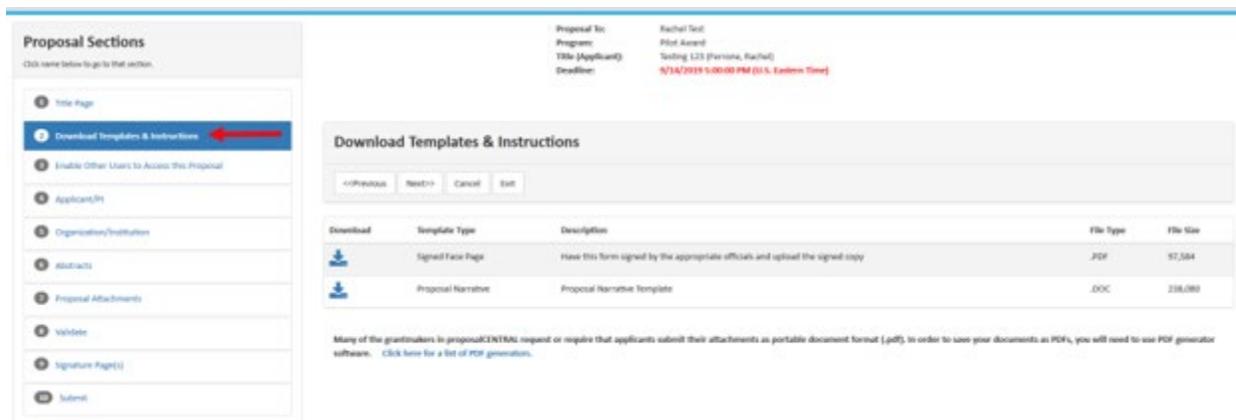


The screenshot shows a table of grant opportunities. The table has columns for Grant Maker, Program, UOI Deadline, Proposal Deadline, Contact Information, Apply, and FAQ. A red arrow points to a document icon in the 'Program' column for the row 'Application using all Pages'.

| Grant Maker | Program | UOI Deadline | Proposal Deadline | Contact Information | Apply | FAQ |
|-------------------|-----------------------------|--------------|-----------------------|---------------------|-----------|-----|
| Rockville Roadrun | RRM Demo Application #1 | | 12/31/2019 8:42:00 PM | Kathy Morrow | Apply Now | |
| Rockville Roadrun | Application using all Pages | | 12/31/2019 4:00:00 PM | Monika Lest | Apply Now | |

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.



The screenshot shows the 'Download Templates & Instructions' section of a proposal application. It includes a sidebar with 'Proposal Sections' and a main area with a table of templates for download.

Proposal To: Rachel Test
Program: Pilot Award
Title (Applicant): Testing 123 (Herrons, Rachel)
Deadline: 7/14/2019 5:00:00 PM (U.S. Eastern Time)

Download Templates & Instructions

| Download | Template Type | Description | File Type | File Size |
|----------|--------------------|---|-----------|-----------|
| | Signed Form Page | Have this form signed by the appropriate officials and upload the signed copy | PDF | 97,584 |
| | Proposal Narrative | Proposal Narrative Template | DOC | 238,080 |

Many of the grantmakers in proposalCENTRAL request or require that applicants submit their attachments as portable document format (.pdf). In order to view your documents as PDFs, you will need to use PDF generator software. [Click here for a list of PDF generators.](#)

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.

Organization/Institution

<<Previous Next>> Save Print Cancel Exit

PI'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 Altum Inc.

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

Address

- * Street 6707 Democracy Blvd. Suite 104
- * City Bethesda
- State/Province MD
- * Zip/Postal Code 20817
- * Phone 703-964-5840

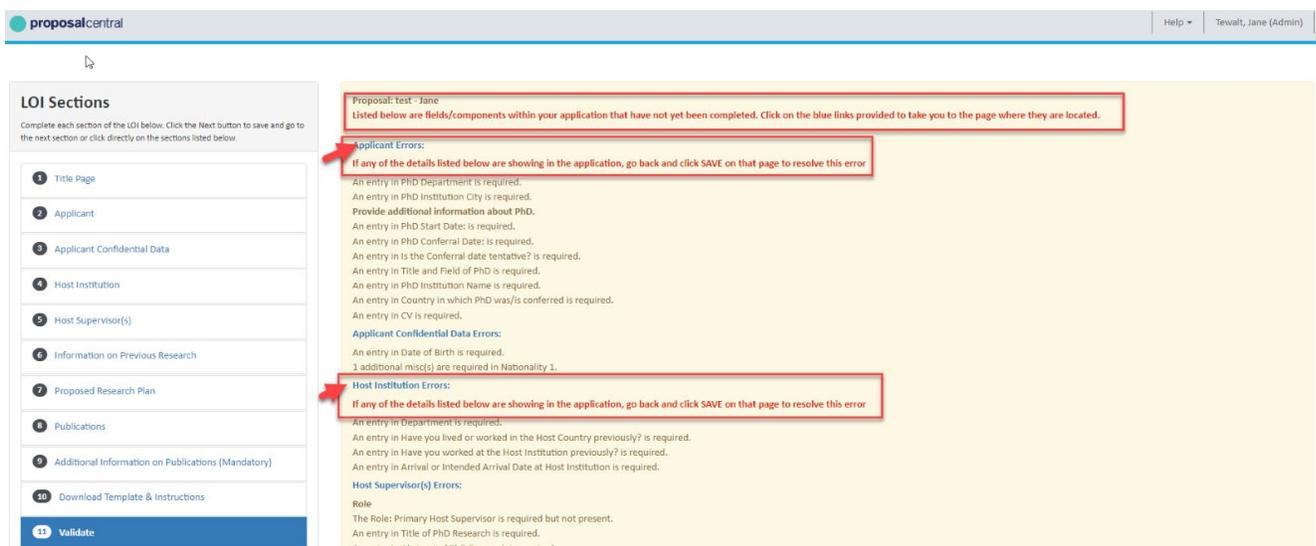
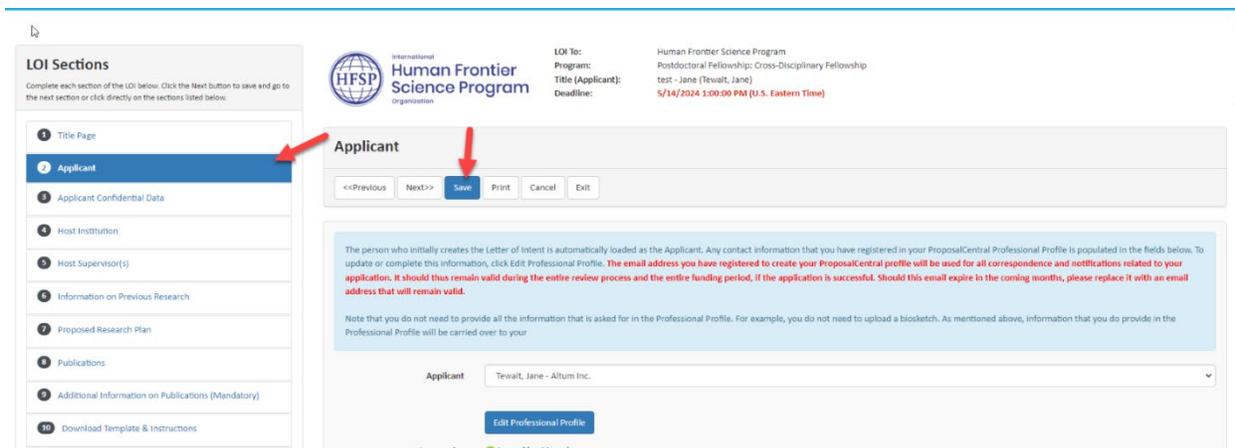
If required institution information is missing or appears to be incorrect, please contact the following individual(s). They have access to the institution profile and can make the necessary updates.

| Contact | Email | Phone |
|--------------|---------------------------|--------------|
| Miller, Brad | bradmiller123@example.com | 703-964-5863 |

Save

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 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.

Proposal Sections
Click name below to go to that section.

- Title Page
- Download Templates & Instructions
- Enable Other Users to Access this Proposal
- Applicant/PI
- Organization/Institution
- Abstracts
- Proposal Attachments
- Validate
- Signature Page(s)**
- Submit

Support Links

Proposal To: Rachel Test
 Program: Pilot Award
 Title (Applicant): Testing 123 (Ferrone, Rachel)
 Deadline: 9/14/2019 5:00:00 PM (U.S. Eastern Time)

Signature Page(s)

<<Previous Next>> Cancel Exit

After you complete all the proposal sections, click one of the Print buttons below to open and print the cover/signature pages and application files.
Before printing, please use the "Validate" option (in the navigation menu to the left) to verify that you have entered all the required information.

Print Signature Pages Print Signature Pages with Attachments

You must have the FREE Adobe Acrobat Reader installed to view either of the above options.
Attention Apple/Mac users: The default Apple PDF viewer will not work properly.
 Download the latest version of the Acrobat Reader from Adobe at <http://www.adobe.com/products/acrobat/readermain.html>

<<Previous Next>> Cancel Exit

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.

Proposal Sections
Click name below to go to that section.

- Title Page
- Download Templates & Instructions**
- Enable Other Users to Access this Proposal
- Applicant/PI
- Organization/Institution
- Abstracts
- Proposal Attachments
- Validate
- Signature Page(s)
- Submit

Support Links

Proposal To: Rachel Test
 Program: Pilot Award
 Title (Applicant): Testing 123 (Ferrone, Rachel)
 Deadline: 9/14/2019 5:00:00 PM (U.S. Eastern Time)

Download Templates & Instructions

<<Previous Next>> Cancel Exit

| Download | Template Type | Description | File Type | File Size |
|----------|--------------------|---|-----------|-----------|
| | Signed Face Page | Have this form signed by the appropriate officials and upload the signed copy | .PDF | 97,584 |
| | Proposal Narrative | Proposal Narrative Template | .DOC | 238,080 |

Many of the grantmakers in proposalCENTRAL request or require that applicants submit their attachments as portable document format (.pdf). In order to save your documents as PDFs, you will need to use PDF generator software. [Click here for a list of PDF generators.](#)

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:

- In the section of the application that allows you to upload files:
 - Check the “Attachment Type” drop down menu to see if the Grant Maker has provided an option for a signature page.
 - Check the section with the instructions in the blue bar that state, “Required attachments that have not 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.

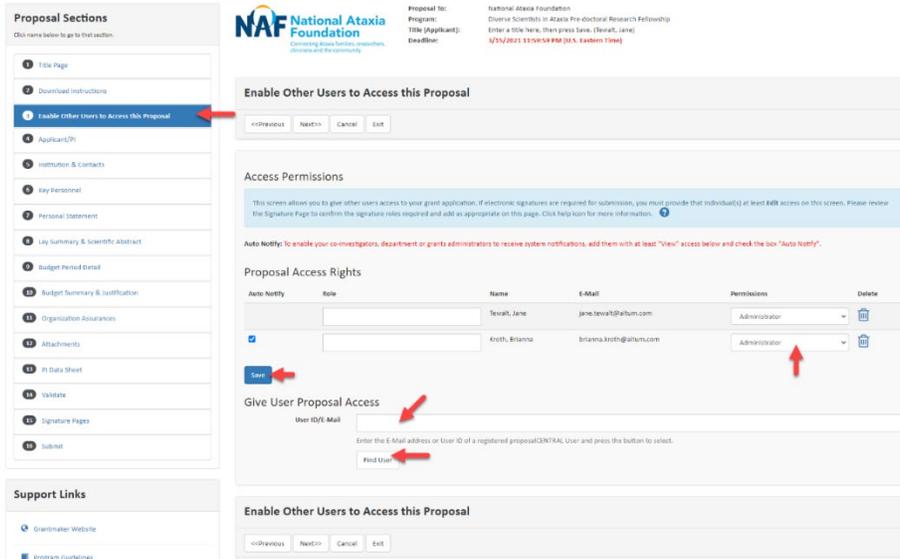
2. Review the Program Guidelines that the Grant Maker has supplied by clicking the link or document icon for “Program Guidelines” in the Support Links section #2.
3. If it’s still not clear, contact the Grant Maker by clicking the “Email to Program Admin” link in the Support Links section #3.

The screenshot displays the 'Proposal Attachments' section of a grant application system. On the left, a 'Proposal Sections' sidebar lists steps from 1 to 10, with 'Proposal Attachments' highlighted as step 7. Below it, 'Support Links' includes 'Program Guidelines' (marked with a red box and '2'), 'Email to Program Admin' (marked with a red box and '3'), and 'Application FAQs'. The main area shows proposal details: 'Rachel Tarr', 'Pilot Award', 'Testing 123 (Ferrone, Rachel)', and a deadline of '9/14/2019 5:00:00 PM (U.S. Eastern Time)'. The 'Proposal Attachments' form includes a 'Mode' selector (PC drive selected), an 'Attachment Type' dropdown menu (marked with a red box and '1a') showing options like 'Signed Signature Page', and a 'Describe Attachment' field. Below the form is a table of 'Allowed File Types' (marked with a red box and '1b'):

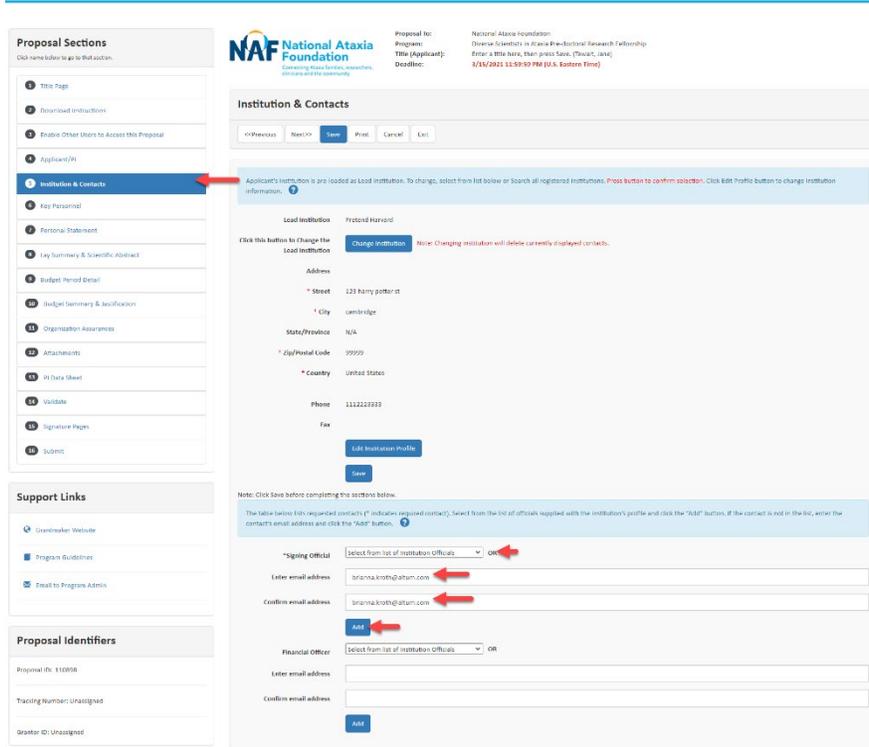
| Allowable File Types | Attachment Type | Max File Size (in KB) |
|----------------------|-----------------------|-----------------------|
| .PDF | Signed Signature Page | 10,000 |

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.

Proposal Sections
 1. Title Page
 2. Download Instructions
 3. Enable Other Users to Access My Proposal
 4. Application ID
 5. **Institution & Contacts**
 6. My Personnel
 7. Personal Statement
 8. Lay Summary & Scientific Abstract
 9. Budget Detail
 10. Budget Summary & Justification
 11. Organizational Information
 12. Attachments
 13. PI Data Sheet
 14. History
 15. Signature Pages
 16. Submit

Support Links
 Distribution Methods
 Program Guidelines
 Email to Program Admin

Proposal Identifiers
 Proposal ID: 110885
 Tracking Number: Unassigned
 Review ID: Unassigned

NAF National Ataxia Foundation
 Connecting Researchers, Resources, and Research
 Proposal To: National Ataxia Foundation
 Program: Genetic Research in Ataxia Pre-doctoral Research Fellowship
 Title (Application):
 Deadline: 8/31/2021 11:59:59 PM (U.S. Eastern Time)

Institution & Contacts

Application's institution is pre-filled as used institution. To change, select from list below or Search all registered institutions. **Print** button to print selection. Click **Save Profile** button to change institution information.

Lead Institution: **Princeton University**
 Click this button to change the Lead Institution: **Change Institution** Note: Changing Institution will delete currently entered contacts.

Address:
 * Street: 333 Haring Haller Rd
 * City: Cambridge
 * State/Province: NJ
 * Zip/Postal Code: 08909
 * Country: United States
 * Phone: 2122222333
 * Fax:

Save Institution Profile
Save

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 this 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.

| Title | Name | Title | Institution | Email | Phone |
|-------------------|--------------|-------------------------------|-------------|------------------------|--------------|
| *Signing Official | Scott, Brian | Junior Client Support Analyst | Alburn Inc. | brian.scott@alburn.com | 703-855-1439 |

Assigned Official: **OR**

Enter email address:
 Confirm email address:
Add

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.

Proposal Sections
Click name below to go to that section.

- 1 Title Page
- 2 Download Instructions
- 3 Enable Other Users to Access this Proposal
- 4 Applicant/PI
- 5 Institution & Contacts
- 6 Key Personnel
- 7 Personal Statement
- 8 Lay Summary & Scientific Abstract
- 9 Budget Period Detail
- 10 Budget Summary & Justification
- 11 Organization Assurances
- 12 Attachments
- 13 PI Data Sheet
- 14 Validate
- 15 Signature Pages
- 16 Submit

NAF National Ataxia Foundation
Connecting Ataxia families, researchers, clinicians and the community

Proposal To: National Ataxia Foundation
 Program: Diverse Scientists in Ataxia Pre-doctoral Research Fellowship
 Title (Applicant): Enter a title here, then press Save. (Tewalt, Jane)
 Deadline: 3/15/2021 11:59:59 PM (U.S. Eastern Time)

Signature Pages

<<Previous Next>> Cancel Exit

Before signing, please use the 'Validate' option (in the navigation menu to the left) to verify that you have entered all the required information.
 You must give your Signing Official access to your application in Section 3 (Enable Other Users to Access this Proposal) so that they can log in to sign your application.

* Applicant/PI (Jane Tewalt)
 The Applicant/PI must enter their name as a signature.

* Signing Official (Brianna Kroth)
 The Signing Official listed in the Institution & Contacts section must sign this application for submission.

After you complete all the proposal sections, click one of the download buttons to open and review the cover/signature pages and application files.

You must have the FREE Adobe Acrobat Reader installed to view either of the above options.
Attention Apple/Mac users: The default Apple PDF viewer will not work properly.
 Download the latest version of the Acrobat Reader from Adobe at: <http://www.adobe.com/products/acrobat/readmain.html>

<<Previous Next>> Cancel Exit

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.

Home Proposals Awards Professional Profile Institution Profile Grant Opportunities pCdrive

Create New Proposal Deadlines displayed in U.S. Eastern Time

2 Proposals Due

Show 10 entries Search:

| Identifier | Title | Grant Maker | Program | Type | Investigator | Due Date |
|------------|--------------------------------------|----------------------------|---|----------|--------------|---------------------|
| 110890 | Enter a title here, then press Save. | National Ataxia Foundation | Diverse Scientists in Ataxia Pre-doctoral Research Fellowship | Proposal | Tewalt, Jane | 03/15/2021 11:59 PM |

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.

Proposal Sections
Click name below to go to that section

- 1 Title Page
- 2 Download Templates & Instructions
- 3 Enable Other Users to Access this Proposal
- 4 Applicant ID#
- 5 Hospital & Contacts
- 6 Select Participating Personnel/Other Key Persons
- 7 Health Statement/Abstract
- 8 Budget Period Detail
- 9 Budget Summary
- 10 Other Support
- 11 Organization Assurance(s)
- 12 Research Plan
- 13 Validate
- 14 Signature Page(s)
- 15 Submit

Support Links

- Grantmaker Website
- Program Guidelines
- Email to Program Admin
- Application FAQs

Proposal Identifiers

Proposal ID: 110825
Tracking Number: Unassigned
Grantor ID: Unassigned

Shriners Hospitals for Children®

Proposal To: Shriners Hospitals for Children
Program: Developmental Grants (PhD Scientists/Medical Staff Only) - copy for budget posting
Title (Application): Test (Chemistry, Strep)A
Deadline: 12/1/2023 11:59:59 PM (U.S. Eastern Time)

Title Page

Next > Save Print Cancel Exit

Enter a title for your application, then press Save.
Press Next to save any changes and go to the next proposal section.

* Project Title: Test
Do not exceed 85 characters.

Have you submitted this proposal for funding consideration before?

Revision?

* No
Have you submitted this proposal for funding consideration before?

If yes, date of previous submission.
(mm/dd/yyyy)

If a revision, please select the appropriate application from the list of your prior submissions, submitted through proposalCENTRAL.

Prior Proposal NOT in ProposalCentral

* Grant Type: Single Site

Application Type

* New

* Primary Focus: Clinical - Burns
(Choose one)

* Is this application being submitted to other agencies?
No

* If yes, what other agencies?
Enter N/A if not applicable.

* Is Capital Equipment requested on this application?
No

* Are contractual or consortium costs involved?
No

* Is this a database/registry grant?
No

Title Page

Next > Save Print Cancel Exit

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.

Proposal Sections
Click name below to go to that section.

- 1 Title Page
- 2 Download Instructions
- 3 Enable Other Users to Access this Proposal
- 4 Applicant/PI
- 5 Institution & Contacts
- 6 Key Personnel
- 7 Personal Statement
- 8 Lay Summary & Scientific Abstract
- 9 Budget Period Detail
- 10 Budget Summary & Justification
- 11 Organization Assurances
- 12 Attachments
- 13 PI Data Sheet
- 14 Validate
- 15 Signature Pages**
- 16 Submit



Proposal To: National Ataxia Foundation
 Program: Diverse Scientists in Ataxia Pre-doctoral Research Fellowship
 Title (Applicant): Enter a title here, then press Save. (Tewalt, Jane)
 Deadline: 3/15/2021 11:59:59 PM (U.S. Eastern Time)

Signature Pages

<<Previous Next>> Cancel Exit

Before signing, please use the 'Validate' option (in the navigation menu to the left) to verify that you have entered all the required information.
 You must give your Signing Official access to your application in Section 3 (Enable Other Users to Access this Proposal) so that they can log in to sign your application.

* Applicant/PI(Jane Tewalt) Signed: Jane Tewalt 01/12/2021 2:42:29 PM

The Applicant/PI must enter their name as a signature.

* Signing Official(Brianna Kroth)

The Signing Official listed in the Institution & Contacts section must sign this application for submission.

After you complete all the proposal sections, click one of the download buttons to open and review the cover/signature pages and application files.

You must have the FREE Adobe Acrobat Reader installed to view either of the above options.

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?

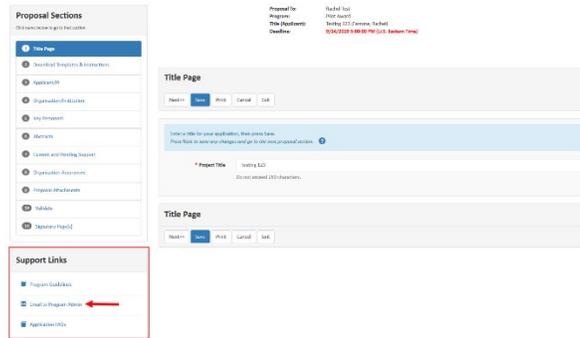
No, you will not lose any information. However, if you want the Grant Maker to have your application, you must repeat the submission process.

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.

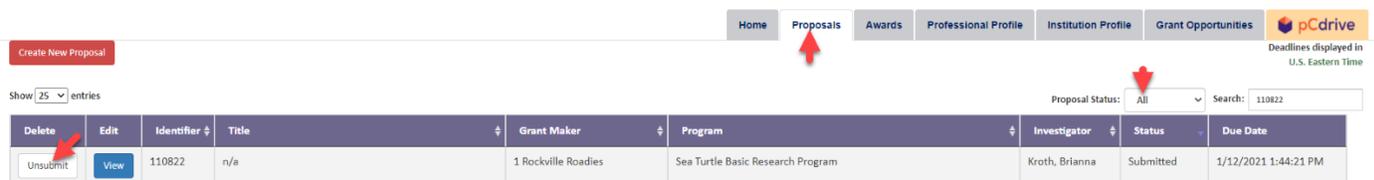


NOTE – Altum ProposalCentral staff CANNOT provide an extension; applicants must contact the Grant Maker for this action.

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.

Show 25 entries

Proposal Status: All Search:

| Delete | Edit | Identifier | Title | Grant Maker | Program | Investigator | Status | Due Date |
|--------|----------------------|------------|-------|----------------------|-----------------------------|----------------|-----------|------------------------|
| | View | 846670 | Test | Zee Test Grant Maker | College Scholarship Program | Kroth, Brianna | Submitted | 12/18/2020 10:25:42 AM |

Showing 1 to 1 of 1 entries

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.

Home Proposals Awards Professional Profile Institution Profile Grant Opportunities pCdrive

Create New Proposal

Show 25 entries

Proposal Status: All Search: 105873

| Delete | Edit | Identifier | Title | Grant Maker | Program | Investigator | Status | Due Date |
|--------|----------------------|------------|------------------------|---|------------------|---------------------------|----------------|-----------------------------|
| | View | 105873 | LOI: test for approval | International Anesthesia Research Society | AUA Impact Award | LOI: Chernyakov, Stefanie | LOI: Submitted | LOI: 12/16/2019 11:59:59 PM |

Showing 1 to 1 of 1 entries (Filtered from 336 total entries)

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.

Proposal Sections

Click name below to go to that section.

- 1 Title Page
- 2 Download Templates & Instructions
- 3 Enable Other Users to Access this Proposal
- 4 Applicant/PI
- 5 Organization/Institution
- 6 Abstracts
- 7 Proposal Attachments
- 8 Validate
- 9 **Signature Page(s)**
- 10 Submit

Support Links

Proposal To: Rachel Test
 Program: Pilot Award
 Title (Applicant): Testing 123 (Ferrone, Rachel)
 Deadline: 9/14/2019 5:00:00 PM (U.S. Eastern Time)

Signature Page(s)

<<Previous Next>> Cancel Exit

After you complete all the proposal sections, click one of the Print buttons below to open and print the cover/signature pages and application files.
Before printing, please use the "Validate" option (in the navigation menu to the left) to verify that you have entered all the required information.

Print Signature Pages **Print Signature Pages with Attachments**

You must have the FREE Adobe Acrobat Reader installed to view either of the above options.
Attention Apple/Mac users: The default Apple PDF-viewer will not work properly.
 Download the latest version of the Acrobat Reader from Adobe at <http://www.adobe.com/products/acrobat/readmain.html>

<<Previous Next>> Cancel Exit

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.

The screenshot shows the 'Budget Period Detail' page. On the left, the 'Proposal Sections' sidebar lists 11 sections, with 'Budget Period Detail' (section 9) highlighted in blue. The main content area has a header with navigation buttons: '<<Previous', 'Next>>', 'Save', 'Print' (highlighted with a red box), 'Cancel', and 'Exit'. Below the header, there is a blue box with instructions: 'Budget Detail: Enter all Budget data on this page. Enter information for each year of the award below. Click on Period 1 for the first year of funding, and Period 2 for the second year of funding. Include estimated start and end date for each period. This is a two-year award for a total of \$800,000 (\$400,000 per year).' Below this, there are summary rows for 'Total Costs: \$0.00', 'Total Direct Costs: \$0.00', and 'Total Indirect Costs: \$0.00'. A section for 'Period 1' is active, showing 'Start Date' as 3/22/2021 and 'End Date' as 3/22/2022. Below this, another summary row shows 'Period Total Costs: \$0.00', 'Period Direct Costs: \$0.00(0.00%)', and 'Period Indirect Costs: \$0.00(0.00%)'.

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.

| File Name | Attachment Type | Description | Date | Delete |
|-------------------------------|------------------------------------|-------------|----------------------|--------|
| placeholder doc.pdf | Project Description | | 6/20/2019 9:44:34 AM | |
| placeholder doc.pdf | Principal Investigator's Biosketch | | 6/20/2019 9:44:24 AM | |
| placeholder doc.pdf | Signature Page(s) | | 6/20/2019 9:44:46 AM | |
| Good clinical practice(1).pdf | Signature Page(s) | | 6/20/2019 1:44:56 PM | |
| placeholder doc.pdf | Tenure Letter | | 6/20/2019 9:44:54 AM | |

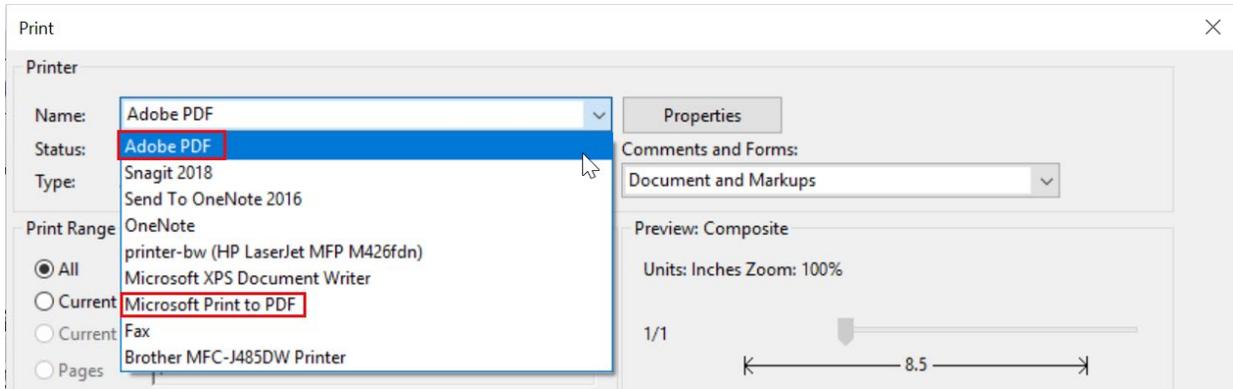
- b. Click the “Delete link” next to the file that was NOT included when you clicked the **Print Signature Pages and Attached PDF Files** button. (Reminder, you may be deleting a file that is not highlighted in red.)

| File Name | Attachment Type | Description | Date | Delete |
|-------------------------------|------------------------------------|-------------|----------------------|------------------------------------|
| placeholder doc.pdf | Project Description | | 6/20/2019 9:44:34 AM | |
| placeholder doc.pdf | Principal Investigator's Biosketch | | 6/20/2019 9:44:24 AM | |
| placeholder doc.pdf | Signature Page(s) | | 6/20/2019 9:44:46 AM | |
| Good clinical practice(1).pdf | Signature Page(s) | | 6/20/2019 1:44:56 PM | → |
| placeholder doc.pdf | Tenure Letter | | 6/20/2019 9:44:54 AM | |

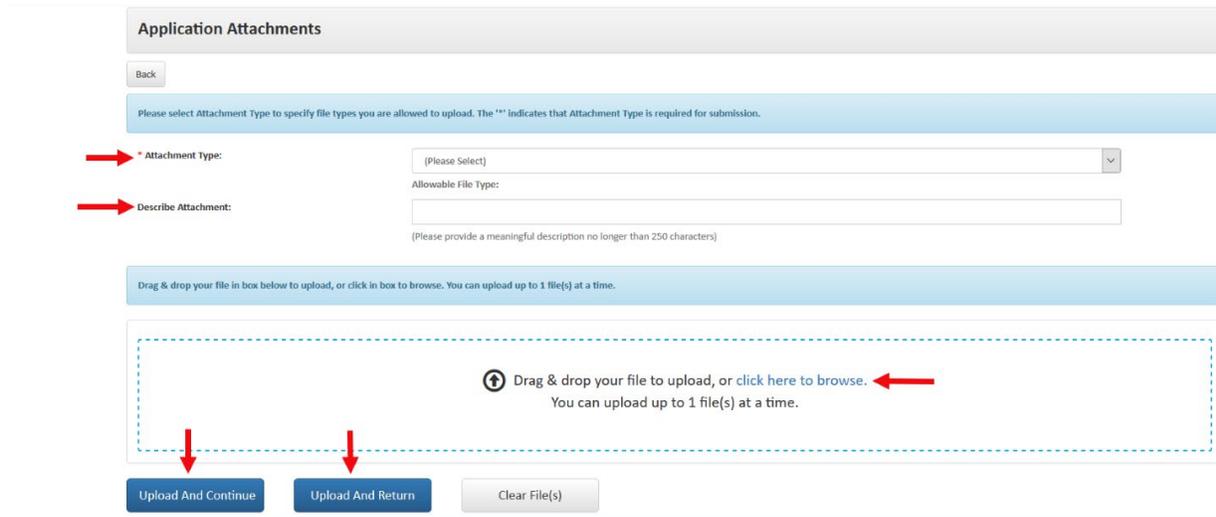
- c. You are prompted to confirm you want to proceed with deleting that file, click the **Yes** button.

| File Name | Attachment Type | Description | Date | Delete |
|-------------------------------|------------------------------------|-------------|----------------------|---|
| placeholder doc.pdf | Project Description | | 6/20/2019 9:44:34 AM | |
| placeholder doc.pdf | Principal Investigator's Biosketch | | 6/20/2019 9:44:24 AM | |
| placeholder doc.pdf | Signature Page(s) | | 6/20/2019 9:44:46 AM | |
| Good clinical practice(1).pdf | Signature Page(s) | | 6/20/2019 1:44:56 PM | <div style="border: 1px solid gray; padding: 2px; font-size: 8px;">Are you sure you want to Delete the attachment? <input checked="" type="button" value="Yes"/> <input type="button" value="No"/></div> |
| placeholder doc.pdf | Tenure Letter | | 6/20/2019 9:44:54 AM | |

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.

Proposal Sections

Click name below to go to that section.

- Title Page
- Download Templates & Instructions
- Enable Other Users to Access this Proposal
- Applicant/PI
- Organization/Institution
- Abstracts
- Proposal Attachments
- Validate
- Signature Page(s)
- Submit

Support Links

Proposal To: Rachel Test
 Program: Pilot Award
 Title (Applicant): Testing 123 (Ferrone, Rachel)
 Deadline: 9/14/2019 5:00:00 PM (U.S. Eastern Time)

Signature Page(s)

<<Previous Next>> Cancel Exit

After you complete all the proposal sections, click one of the Print buttons below to open and print the cover/signature pages and application files.
 Before printing, please use the "Validate" option (in the navigation menu to the left) to verify that you have entered all the required information.

Print Signature Pages Print Signature Pages with Attachments

You must have the FREE Adobe Acrobat Reader installed to view either of the above options.
Attention Apple/Mac users: The default Apple PDF viewer will not work properly.
 Download the latest version of the Acrobat Reader from Adobe at <http://www.adobe.com/products/acrobat/readermain.html>

<<Previous Next>> Cancel Exit

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.

Home **Proposals** Awards Professional Profile Institution Profile Grant Opportunities

Create New Proposal

Deadlines displayed in U.S. Eastern Time

Show 25 entries

Proposal Status: All Search:

| Delete | Edit | Identifier | Title | Grant Maker | Program | Investigator | Status | Due Date |
|--------|----------------------|------------|---|---|--------------------------------------|---|--------------------------------------|---|
| | View | 90003 | title | Cystic Fibrosis Foundation | Impact Grants | Chernyakov, Stefanie | Submitted | 3/31/2017 2:24:07 PM |
| | View | 69937 | This is a second test | International Anesthesia Research Society | 2014 IARS Annual Meeting White Paper | Chernyakov, Stefanie | Submitted | 7/17/2013 9:59:52 AM |
| | View | 97900 | Proposal: test application LOI: LOI Bypass | Crohn's & Colitis Foundation | Clinical Research Network | Proposal: Chernyakov, Stefanie LOI: Chernyakov, Stefanie | Proposal: Submitted LOI: Approved | Proposal: 8/28/2018 10:35:45 AM LOI: 8/28/2018 10:25:41 AM |
| | View | 71951 | Application 1 to be submitted | SPC Foundation | SPC Test Proposal 2014 | Chernyakov, Stefanie | Submitted | 4/8/2014 12:12:45 PM |

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.

| | |
|--------------|-----------------------------------|
| Applicant: | Goodfellow, Robin |
| Title: | institution archived test |
| Program: | Rachel Edit Welch Research Grants |
| Institution: | Institute Iwllarchive |
| App #: | 102023 |

View Review Information

[Close Window](#) [Print](#)

Committee: Second Committee Test
Summary Statement
 No Admin Summary has been entered.

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.

The screenshot shows the ProposalCentral interface. The navigation menu includes Home, Proposals (highlighted with a red box), Awards, Professional Profile, Institution Profile, and Grant Opportunities. A 'Create New Proposal' button is visible on the left. Below the navigation, there is a 'Show 25 entries' dropdown and a 'Proposal Status' dropdown menu set to 'All' (highlighted with a red box). A search bar is also present. The main content area shows a table with columns: Delete, Edit, Identifier, Title, Grant Maker, Program, Investigator, Status, and Due Date. The table is currently empty, displaying 'No data available in table'.

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.

LOI Sections
Complete each section of the LOI below. Click the Next button to save and go to the next section or click directly on the sections listed below.

- Title Page
- Download Templates & Instructions
- Enable Other Users to Access this Proposal**
- Applicant
- Organization
- Key Personnel
- Letters of Reference
- Misc for FFADA
- Abstract and keywords
- New Other Support
- Attach Letter of Intent here
- Validate
- Signature Page(s)
- Submit

Proposal Sections
LOI must be submitted and approved before Proposal can be completed.

LOI To: Zee Test Grant Maker
Program: Basic App
Title (Applicant): Test for Extension (McMiller, Da/Ron)
Deadline: 10/16/2019 11:59:59 PM (U.S. Eastern Time)

Enable Other Users to Access this Proposal

<<Previous Next>> Cancel Exit

Access Permissions

This screen allows you to give other users access to your grant application. 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 | E-Mail | Permissions | Delete |
|--------------------------|------|------------------|--------------------------|---------------|--------|
| <input type="checkbox"/> | | McMiller, Da/Ron | daron.mcmiller@altum.com | Administrator | |
| <input type="checkbox"/> | | vin, vanda | vvinay5@altum.com | View | |

Give User Proposal Access

User ID/E-Mail

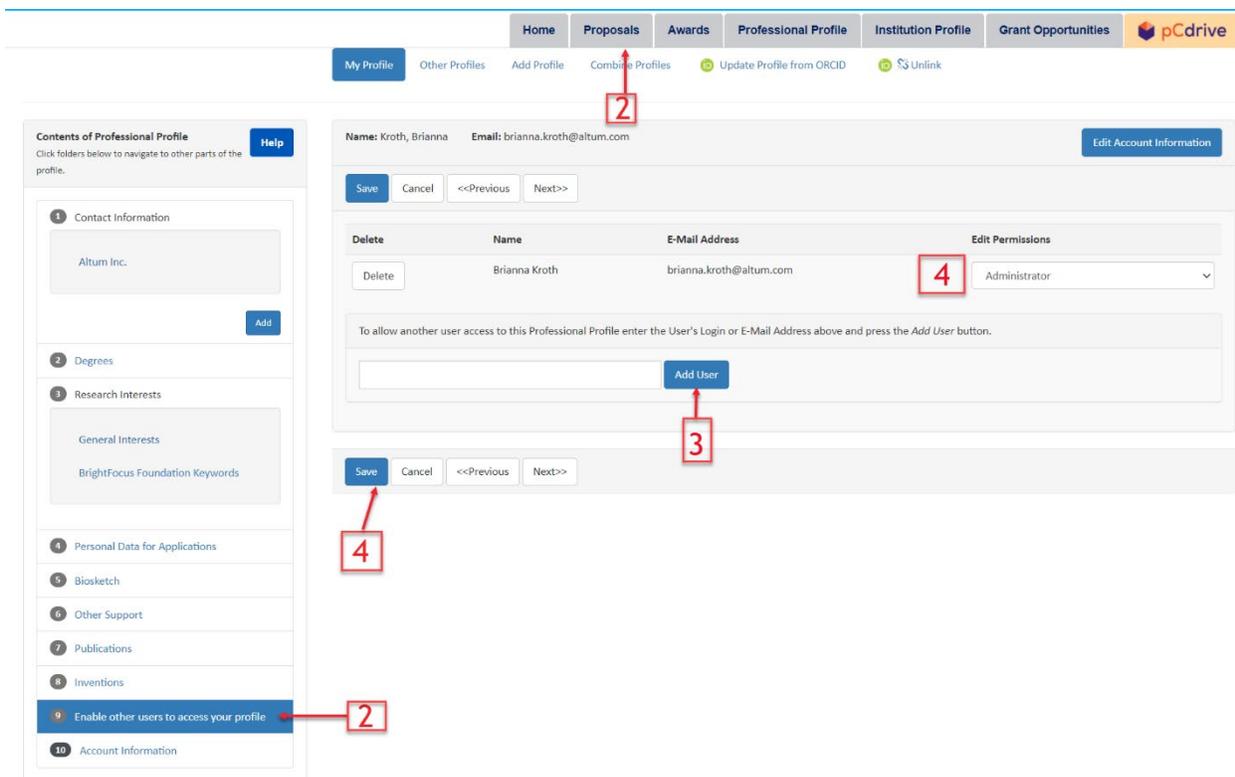
Enter the E-Mail address or User ID of a registered proposalCENTRAL User and press the button to select.

Find User

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.

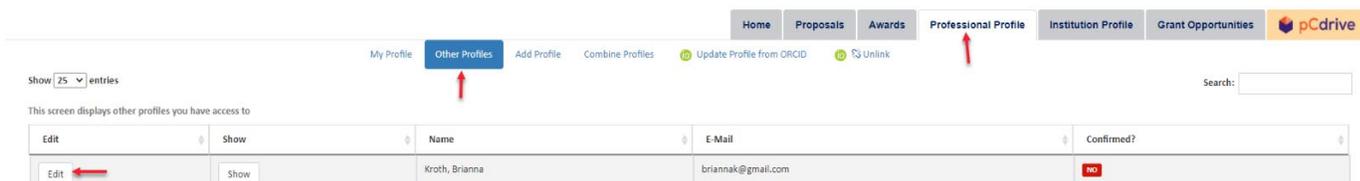
The PI must explicitly provide some access to their profile for that person to be able to update it. If you do not have access to the PI's profile, use the following instructions to allow you access to their profile:

- Go to <https://proposalcentral.com/> and login under the "Application Login" section.
- Click the Professional Profile tab and then click the "Enable other users to access your profile" link in the gray menu on the left.
- Add the e-mail address of the person who should have access to your profile and click the **Add User** button.
- 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:

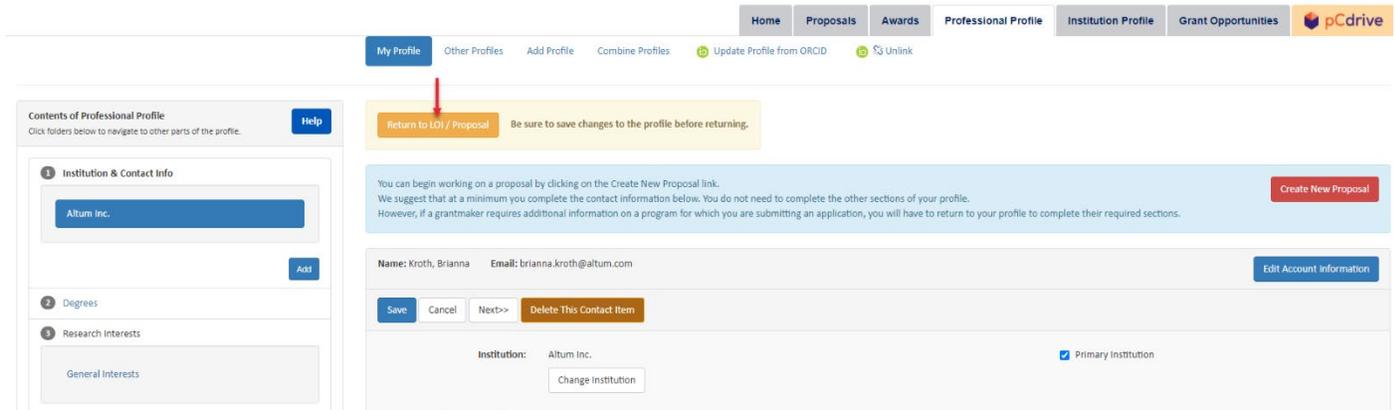
1. Go to <https://proposalcentral.com/> and login under the “Application Login” section.
2. Click the Professional Profile tab and then click on **Other Profiles**.
3. Click the **Edit** link next to the PI’s name. That returns the PI’s profile and you can update information. Remember to click the **Save**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

Proposal Sections
Click name below to go to that section.

- Title Page
- Download Templates & Instructions
- Enable Other Users to Access this Proposal**
- Program Director
- Leadership & Officials
- Care Team
- Quality Improvement
- Narrative
- Attachments
- Validate
- Signature Page(s)

Support Links

- Grantmaker Website
- Program Guidelines
- Email to Program Admin

Proposal To: Your Logo
Program: Clinic Center Support Grant
Title (Applicant): Greater Boster Clinical Center (Jodl, Alfred)
Deadline: 9/8/2015 11:59:59 PM (U.S. Eastern Time)

Enable Other Users to Access this Proposal

<<Previous Next>> Cancel Exit

Access Permissions
This screen allows you to give other users access to your grant application. 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 | E-Mail | Permissions | Delete |
|--------------------------|------------------------|---------------------|-------------------------|---------------|--------|
| <input type="checkbox"/> | Principal Investigator | Jodl, Alfred | ajodl@example.com | Administrator | |
| <input type="checkbox"/> | | Montgomery, Bernard | bmontgomery@example.com | Administrator | |

Save

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.

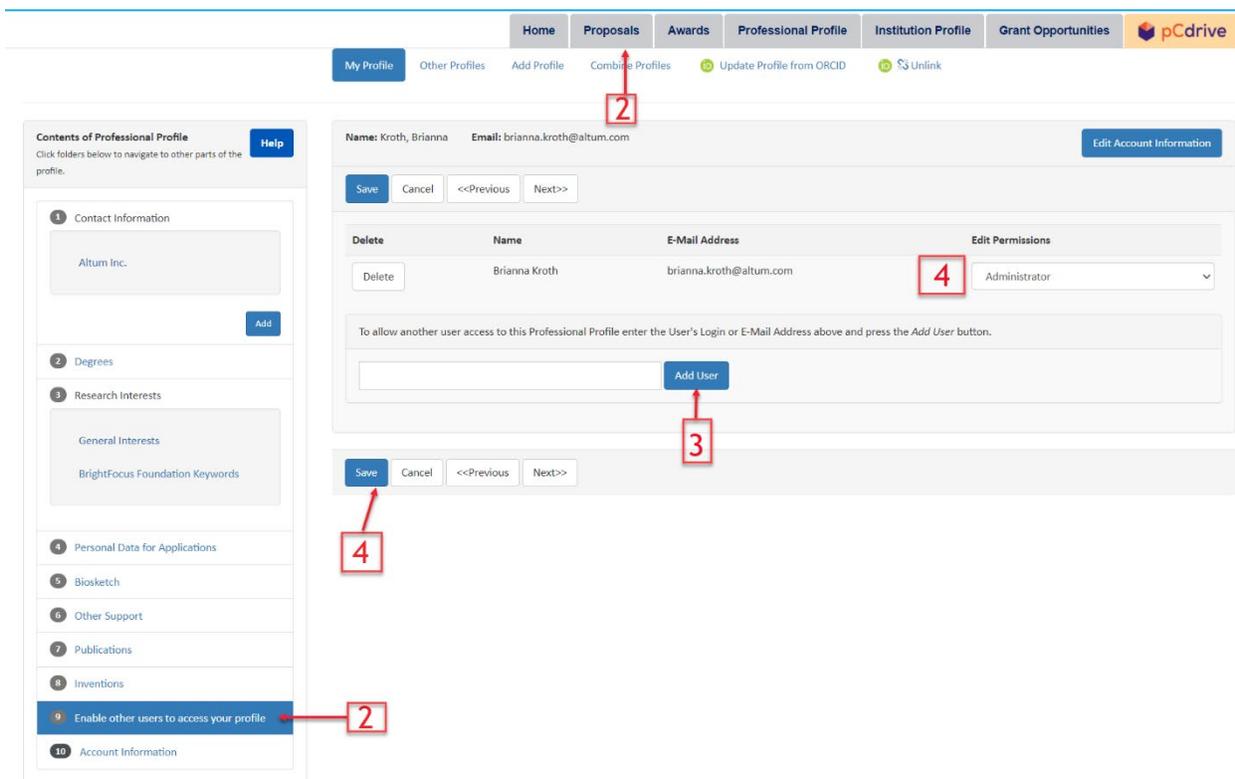
Find User

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:

- Go to <https://proposalcentral.com/> and login under the "Application Login" section.
- Click the Professional Profile tab and then the "Enable other users to access your profile" link in the gray menu on the left.
- Add the e-mail address of the person who should have access to your profile and click the **Add User** button.
- 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.

- Return to <https://proposalcentral.com/> and login under the “Application Login” section by providing the username and password you created in Step 2.
- Paste the confirmation number and click the **Submit Confirmation Number** button.
- 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:

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

Proposal Sections
Click name below to go to that section.

- Title Page
- Download Templates & Instructions
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- Attachments
- Validate
- Signature Page(s)

Support Links

- Grantmaker Website
- Program Guidelines
- Email to Program Admin

Proposal To:
Program: Your Logo
 Clinic Center Support Grant
Title (Applicant): Greater Boster Clinical Center (Jodl, Alfred)
Deadline: 9/8/2015 11:59:59 PM (U.S. Eastern Time)

Enable Other Users to Access this Proposal

<<Previous Next>> Cancel Exit

Access Permissions
This screen allows you to give other users access to your grant application. 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 | E-Mail | Permissions | Delete |
|-------------------------------------|------------------------|---------------------|-------------------------|---------------|--------|
| <input checked="" type="checkbox"/> | Principal Investigator | Jodl, Alfred | ajodl@example.com | Administrator | |
| <input type="checkbox"/> | | Montgomery, Bernard | bmontgomery@example.com | Administrator | |

Give User Proposal Access

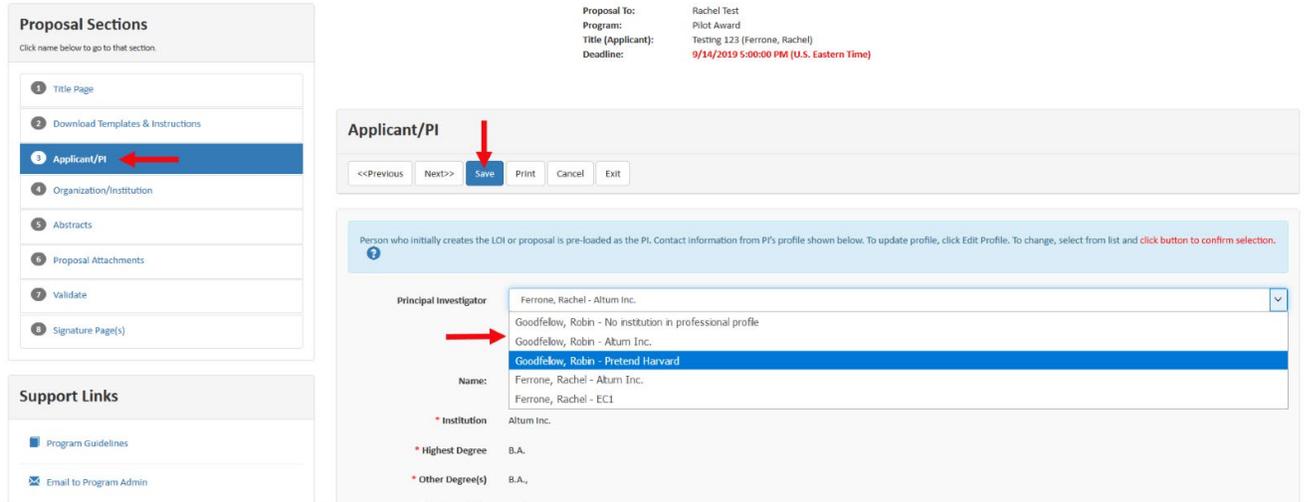
User ID/E-Mail

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

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

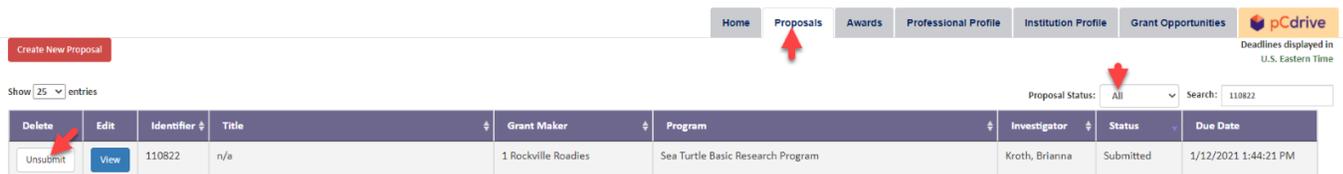
- Go to <https://proposalcentral.com/> and login below “Application Login”.
- Click on the Proposals tab.
- Click the **Edit** button next to the proposal.

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.

Proposal Sections
Click name below to go to that section.

- 1 Title Page
- 2 Download Templates & Instructions
- 3 Enable Other Users to Access this Proposal**
- 4 Program Director
- 5 Leadership & Officials
- 6 Care Team
- 7 Quality Improvement
- 8 Narrative
- 9 Attachments
- 10 Validate
- 11 Signature Page(s)

Support Links

- Grantmaker Website
- Program Guidelines
- Email to Program Admin

Proposal To: Your Logo
Program: Clinic Center Support Grant
Title (Applicant): Greater Boston Clinical Center (Jodi, Alfred)
Deadline: 9/8/2015 11:59:59 PM (U.S. Eastern Time)

Enable Other Users to Access this Proposal

<<Previous Next>> Cancel Exit

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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 | E-Mail | Permissions | Delete |
|-------------------------------------|------------------------|---------------------|--------------------------|---------------|--------|
| <input checked="" type="checkbox"/> | Principal Investigator | Jodi, Alfred | ajodi@example.com | Administrator | |
| <input type="checkbox"/> | | Montgomery, Bernard | bnmontgomery@example.com | Administrator | |

Save

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.

Find User

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.