CUSTOMER SUPPORT:
800-875-2562 (Toll-free U.S. & Canada)
+1-703-964-5840 (Direct Dial International)
pcsupport@altum.com

Instructions for Navigating Your Awarded Grant

ProposalCentral's Post-Award module allows grantees to submit progress reports, project documents, financial/budget information, communicate with the funding organization, review payments, etc. The instructions below are intended to provide grantees with a basic orientation to the ProposalCentral post-award functions. Please note that not all grant makers use all the sections of post-award.

This tutorial includes the following information:

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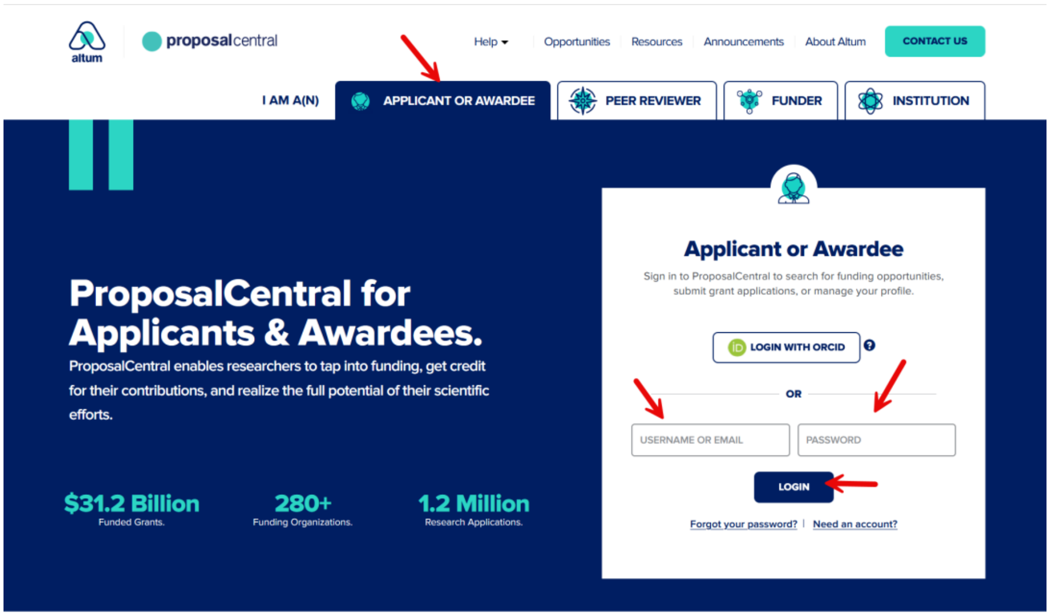
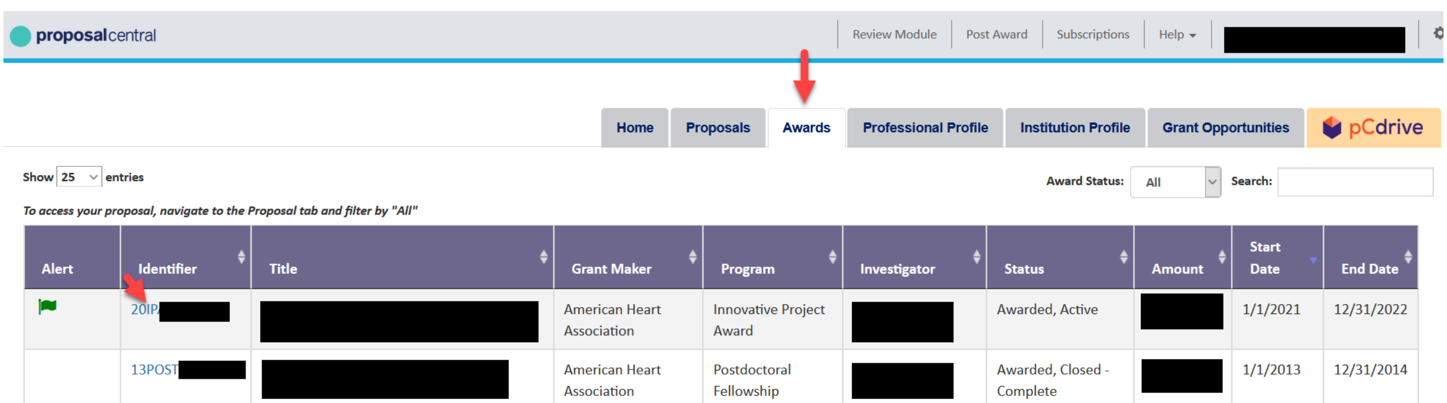
Login & Access

For grantees, post-award information is accessed from the same place that the application was prepared and submitted. Use your web browser to login to the ProposalCentral Application System: https://proposalcentral.com



Use the same e-mail address (or Username) and password used to submit your proposal. If you forget your password, click the Forgot Your Password? link and enter your email address. An e-mail is sent with a link to reset your password.

The default screen displayed upon login is the ProposalCentral Home page. The middle section of this page displays any upcoming deliverables or overdue deliverable tasks. To find a specific award, navigate to the Awards tab.



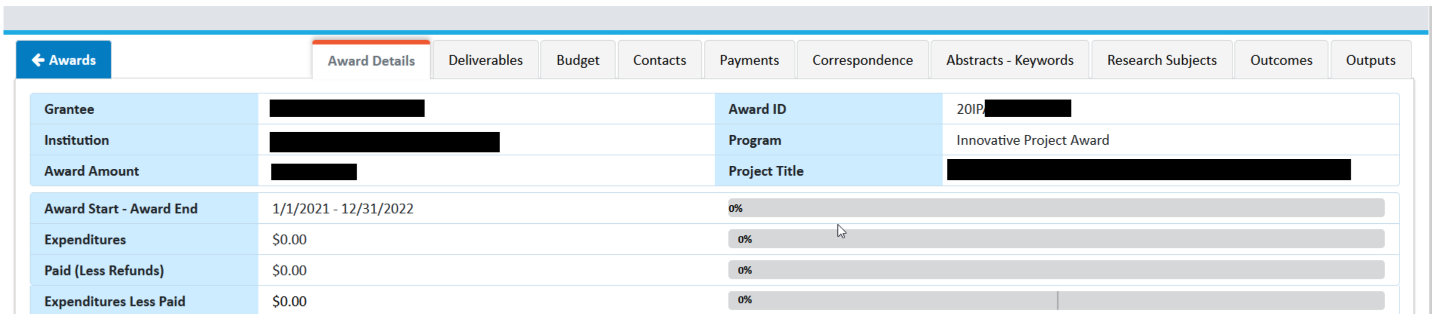
Alert	Identifier	Title	Grant Maker	Program	Investigator	Status	Amount	Start Date	End Date
	20IP[redacted]	[redacted]	American Heart Association	Innovative Project Award	[redacted]	Awarded, Active	[redacted]	1/1/2021	12/31/2022
	13POST[redacted]	[redacted]	American Heart Association	Postdoctoral Fellowship	[redacted]	Awarded, Closed - Complete	[redacted]	1/1/2013	12/31/2014

All awards associated with the logged in user display in table format. Clicking the award ID in the Identifier column, returns the corresponding award details record.

TIP: If the award is not listed in the award list table, it may be in Pre-Award status. If attempting to add a deliverable to a pre-award record, it is found under the Proposals tab.

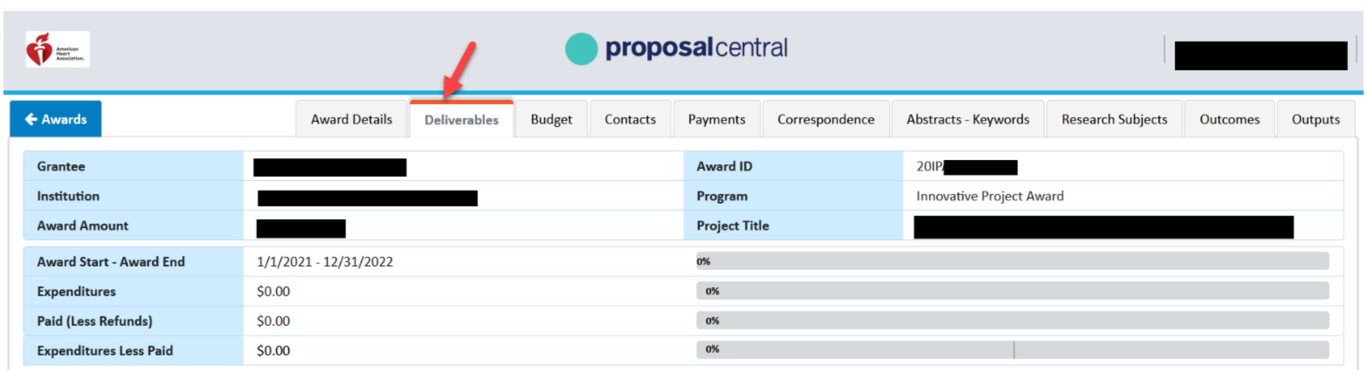
Award Information

Upon clicking the Award identifier from the Awards tab, users are directed to the *Award Details* page. This is the "hub" of the award records – it provides a summary of the award and access to all other sections of the award (e.g. correspondence, deliverables, contacts and access).

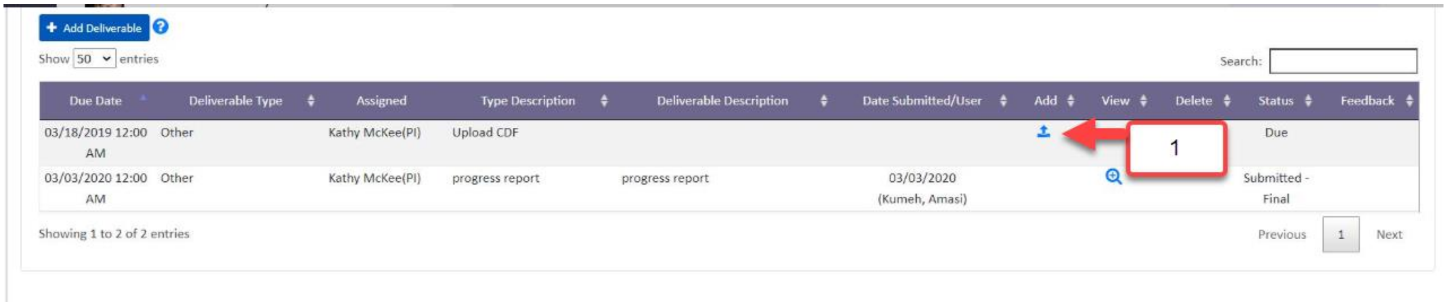


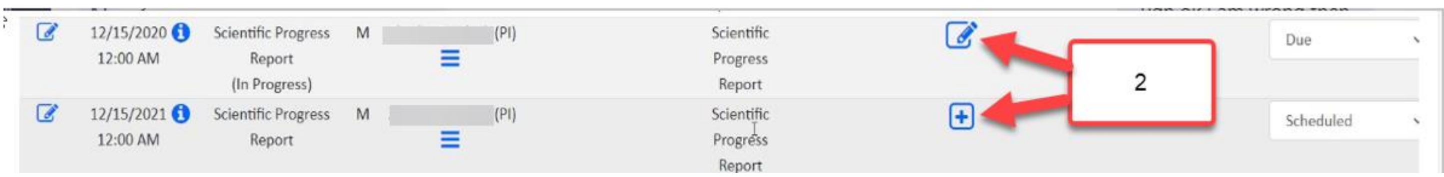
Review Deliverable Schedule and Submit Project Deliverables

The *Deliverables* tab enables you to submit information requested by the grant maker and additional relevant documents. Grant makers typically use deliverables to collect required and scheduled progress and financial reports, as well as "unscheduled" materials like publications, presentations, and change requests. To access the schedule of deliverables, click the Deliverables tab from the top of the page.



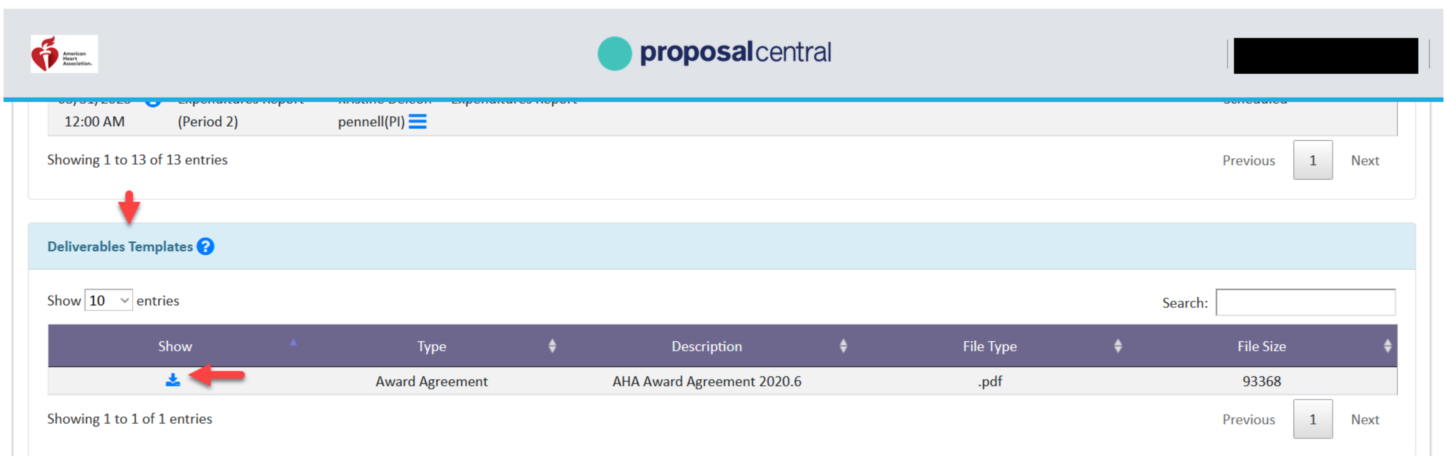
The schedule of deliverables due for the award is shown chronologically. A grant maker can collect information as either a file or data added in the interface via a web form. Your funder may use only one method or both. If they want the material as a file, an Upload icon is listed for the deliverable (1). If grant makers want grantees to complete a web form, either a Start or Edit icon (2) is displayed depending on the type of web form and the status of your work. How to upload a file or complete a web form is described in the Submit Deliverables section. However, the next section provides information on how to download any templates and instructions that may have been provided by the grant maker.





Download Templates, Forms and Instructions

Many grant makers provide templates, forms and/or instructions. To download these templates, scroll to the bottom of the *Deliverables* tab and locate the *Deliverables Templates* section. To download a template, click the Download icon next to the appropriate template and save it locally.



Submit Deliverables

The following section discusses how to submit deliverables to the grant maker.

Submit a File Deliverable Listed In The Schedule

To submit a deliverable that is being collected as a file (e.g. report, document), click the Upload icon in the Add column for the appropriate deliverable.

Due Date	Deliverable Type	Assigned	Type Description	Deliverable Description	Date Submitted/User	Add	View	Delete	Status	Feedback
10/01/2020 12:00 AM	Activation Report PF	Karen Smith(PI)	Activation Report PF						Delinquent	
10/01/2020 12:00 AM	PF Annual Report	Karen Smith(PI)	PF Annual Report						Delinquent	
12/01/2020 12:00 AM	IP Reporting	Karen Smith(PI)	Please complete the webform for IP reporting by the due date provided.						Delinquent	

Depending on the browser's settings this either opens a new tab in the browser or a pop-up window. Please remember to disable pop-up blockers for ProposalCentral. If the pop-up blocker is turned on, the browser will display a message towards the top or bottom of the page indicating that a pop-up was blocked. As every browser is different, this may not be the method to disable the pop-up blocker.

At the top of the new window is a notation indicating the allowed file types (e.g. pdf) (1). Browse to select a file (2). Additionally, there is an option to provide a description of the deliverable, if desired (3). When done, click the **Save** button (4).

Upload Deliverable

Deliverable Type	PF Annual Report Allowed File Type : .DOC, .PDF
Deliverable Type Description	-
Deliverable Description	Please provide a meaningful description for this deliverable
Upload File	Choose File No file chosen

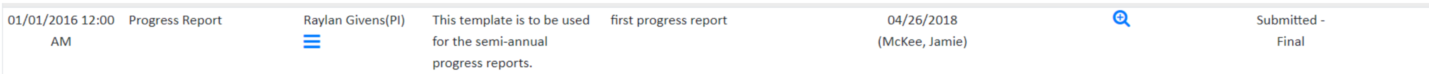
Save Cancel

When the document is successfully uploaded, the deliverable on the schedule shows the submitted date and the user that submitted the deliverable. Additionally, the Add column may haves a Replace indication, if the Grant Maker has enabled it. Click the View icon in the View column to see the uploaded file. To update the file, click the Replace icon and repeat the steps above. To delete the file, click the Delete icon (trash can).

01/01/2018 12:00 AM	Progress Report	Raylan Givens(PI)	This template is to be used for the semi-annual progress reports.	progress report	08/22/2018 McKee, Jamie	Replace			Submitted
09/28/2018 12:00 AM	Final Financial Report	Raylan Givens(PI)	This template is to be used for both the annual and final financial reports.	Final financial report	08/22/2018 McKee, Jamie	Replace			Submitted
09/28/2018 12:00 AM	Final Report	Raylan Givens(PI)	This template is to be used for the final progress report.	final report	08/22/2018 McKee, Jamie	Replace			Submitted

Showing 1 to 10 of 10 entries   Previous 1 Next

If the grant maker has marked the deliverable as "Final", there is a "Final" indication in the Status column. Please note that it is not possible to replace or delete the file after it has been marked as Final by the grant maker. However, it is always possible to view the file by clicking the View icon.



Submit a Web Form Deliverable Listed In The Schedule

To submit a deliverable that is being collected as a web form (e.g. progress report), click the plus sign in the Add column for the appropriate deliverable.

Clicking the plus sign displays either:

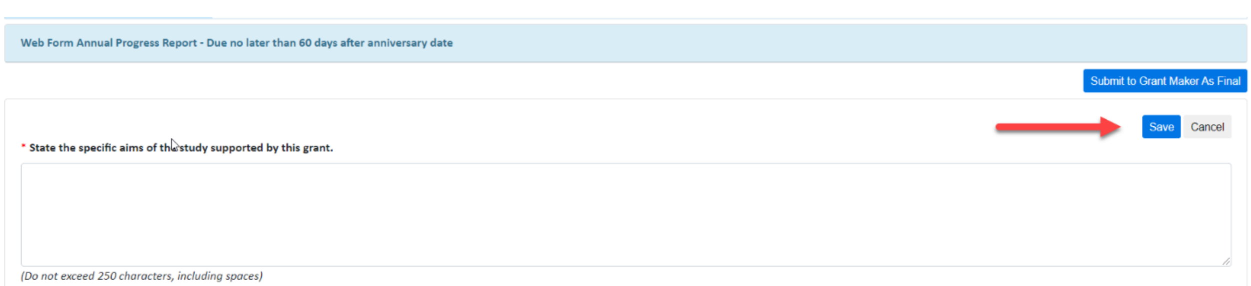
1. A page to complete a web form that *may* include questions, an upload, other support, publications, inventions, demographic information, research subjects, data plan, payment information, ORCID authorization, custom questions and electronic signatures. If this is displayed, refer to the Non-Budget Web Form section below.

2. A Budget deliverable may ask for Awarded, Expenditure, Carry Forward and/or Note information. This deliverable is described in the Budget Web Form section below.

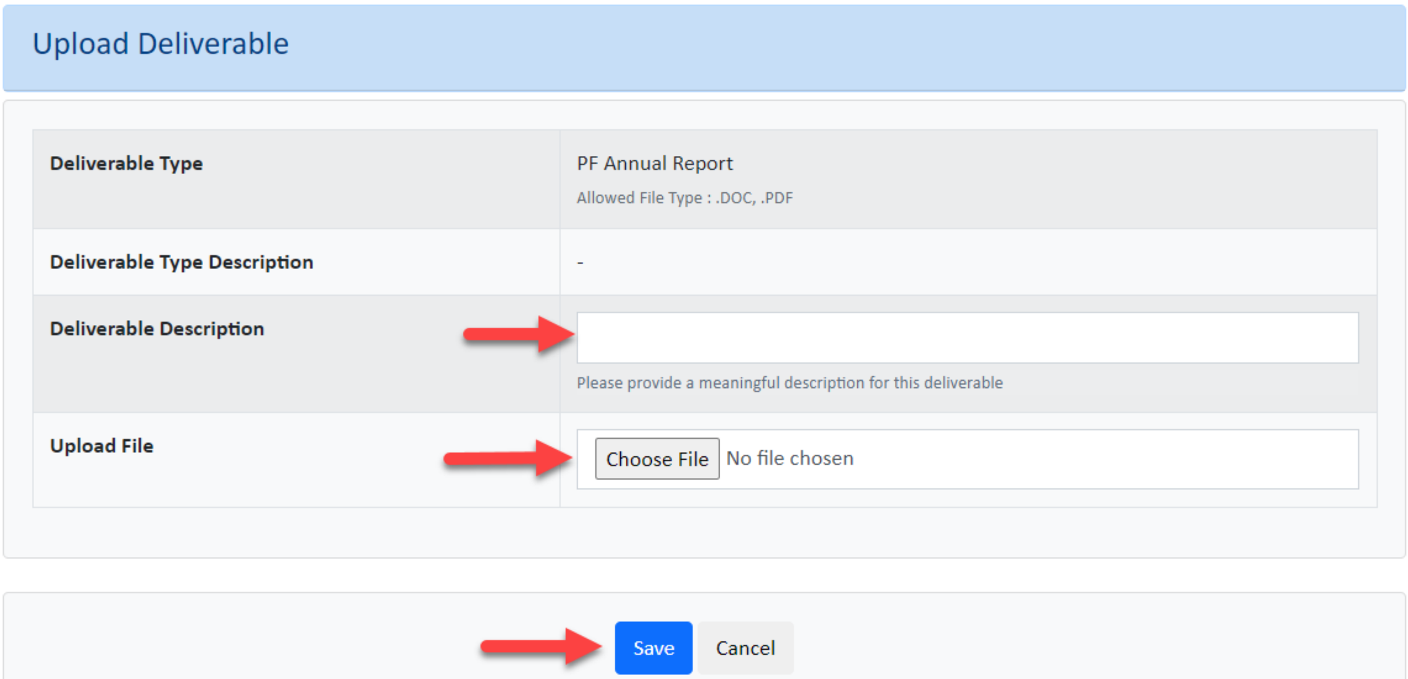
Non-Budget Web Form

Please note that different grant makers may request different information in their reports and therefore what displays may be different than what is described below. The following are examples of items the grant makers may collect in a web form.

1. **Text**: The grant maker may provide instructions/questions and request that you enter a response. Items that require a response are marked with a red asterisk (*). Please make sure to only include plain text and periodically click the **Save** button either directly above or below the text box questions. Please note that there may be character maximums in effect and an error message displays when saving if the maximum is exceeded and requires a revision in order to save.

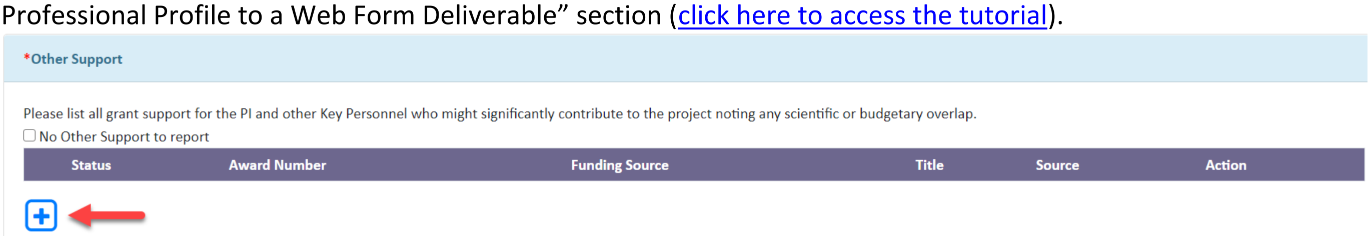


2. **Upload**: The grant maker may allow or require a file. And, if so, the allowable file types are indicated (1). If the upload is required, there is a red asterisk (*) in the blue bar by "Upload". To upload a file, browse to select it from the computer (2). When done, click the **Save** button (3).



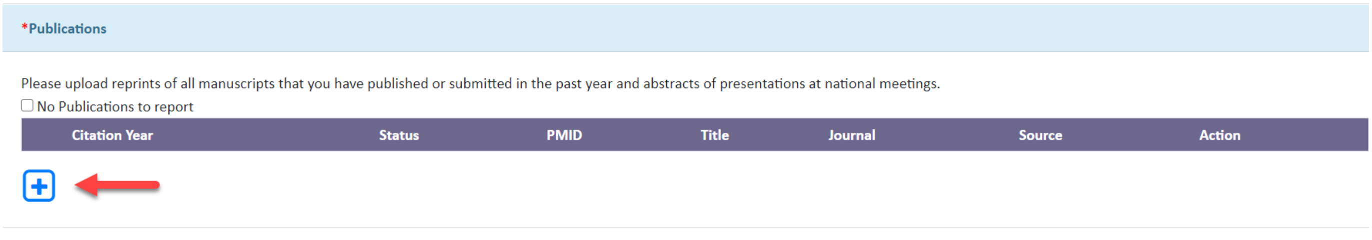
3. **Other Support**: The grant maker may allow or require submission of information related to other support. If other support is required, there is a red asterisk (*) in the blue bar by "Other Support".

   If this section is included, the other support information comes from the grantee's Professional Profile. Therefore, before completing this section, it is recommended that the Other Support section of the grantee's Professional Profile is updated. Once the grantee's Professional Profile has all necessary information, the user can add the other support entries to the report by clicking the plus icon. For details on how to complete this section of the web form, please see the "How to Add Other Support" tutorial "Adding Other Support From Your Professional Profile to a Web Form Deliverable" section (click here to access the tutorial).

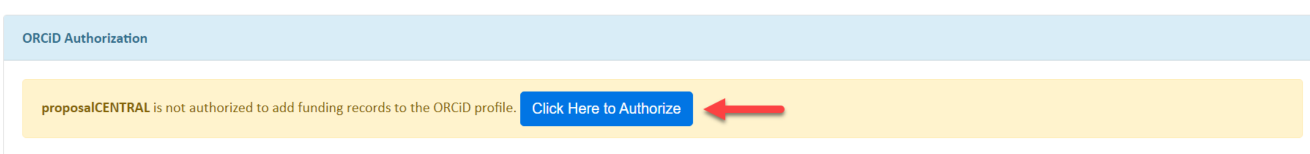


4. **Publications**: The grant maker may allow or require submission of information related to publications. If publications are required, there is a red asterisk (*) in the blue bar by "Publications".

   If this section is included, the publication information comes from the grantee's Professional Profile. Therefore, before completing this section, it is recommended that the Publications section of the grantee's Professional Profile is updated. Once the grantee's Professional Profile has all necessary information, the user can add the publications to the report by clicking the plus icon. For details on how to complete this section of the web form, please see the "How to Add Publications" tutorial "Adding Publications From Your Professional Profile to a Web Form Deliverable" section.



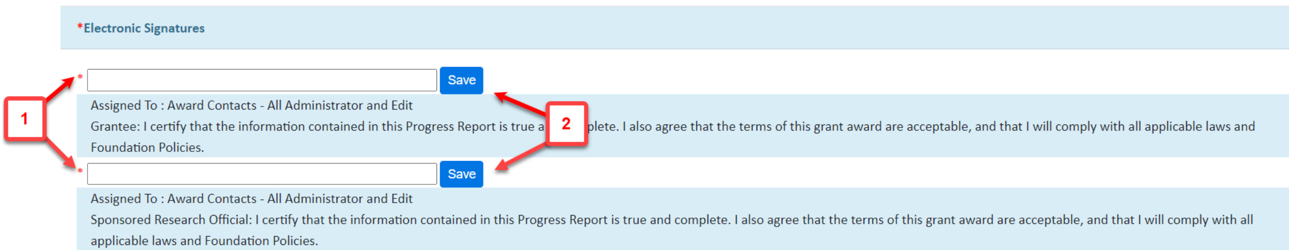
5. **<u>Inventions:</u>** The grant maker may allow or require information on patents and inventions. If invention data is required, there is a red asterisk (*) next to the field. Most of the data is formatted and grantees select the appropriate value from the corresponding dropdown fields. If invention information is requested in multiple deliverables, the previously entered data appears in the subsequent deliverable. Grantees may edit/add/delete as appropriate.
6. **<u>Payee Information:</u>** The grant maker may allow or require information on payees associated with the award. Depending on the grant maker configuration, grantees may enter ACH, wire, and general bank account details.
7. **<u>Private and Demographic Data:</u>** Grantmakers may include a request to update/verify awardee demographic information. Demographic entries are only modifiable by the person who the demographic information belongs to unless access to their profile has been granted to someone else.
8. **<u>Research Subjects – Assurances:</u>** The grant maker may request information pertaining to human or animal subject assurances as part of a web form deliverable. If assurance information was collected during the application in ProposalCentral, the information appears as a starting point associated with the deliverable and grantees may edit/add as appropriate.
9. **<u>Data Plan Collection:</u>** Grant makers have the option to collect information about how grantees will share information attained during the grant lifecycle. If included in a deliverable, the information may be required or optional. A red asterisk (*) next to the field indicates that an entry is required to submit the deliverable. Enter the necessary information and then click the **Save** button (2).
10. **<u>Formatted Questions:</u>** Some deliverables may contain additional questions that do not fit into one of the previously described sections. Grant makers have the option to collect miscellaneous questions from grantees via radio buttons, dropdown selections, dates or amounts. A red asterisk (*) next to the field indicates that an entry is required to submit the deliverable. Enter the necessary information and then click the **Save** button within the section.
11. **<u>ORCID Authorization:</u>** If a grant maker is a member of the ORCID consortium they may include a deliverable requesting a grantee to "authorize" the grant maker to make updates to the grantee's ORCID record. If this is indicated in a deliverable, click the "Click Here to Authorize" button and follow the prompts provided by ORCID. Authorizing the grant maker allows their name to appear on corresponding awards.



12. **<u>Electronic Signatures</u>**: The grant maker may allow or require an electronic signature (aka e-signature). If an e-signature is required, there is a red asterisk (*) next to the signature field. To enter a signature, enter the text in

the field (1) and click the **Save Signature** button (2). Please note that the system records the name of the user that clicked the **Save Signature** button. This allows the grant makers to ensure that the name typed matches the profile of the user who actually entered it.

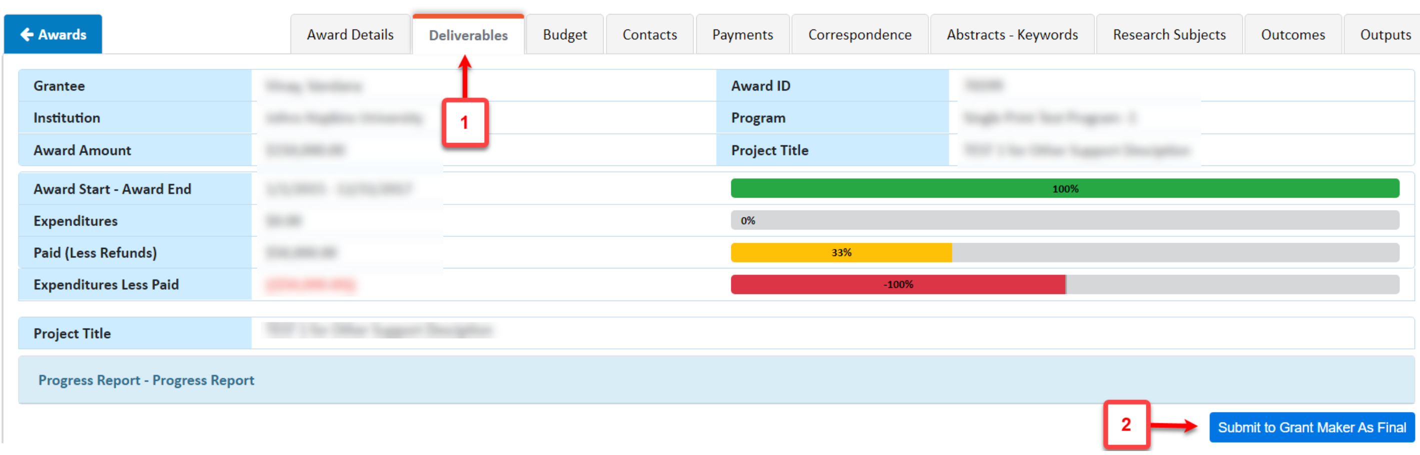
If the grant maker has provided any guidance, instructions, certifications by the e-signature field, make sure to read and follow.



If the user who needs to submit the e-signature does not have access to the grant, see the Contacts and Access section for information on how to provide him/her access to the grant so he/she can e-sign.

To leave the form at any time, click the Deliverables tab at the top (1). Before returning to the Deliverable Schedule, make sure to save all work by clicking one of the **Save** buttons. When the form is complete and you are ready to submit it to the grant maker, click the **Submit to Grant Maker As Final** button in the upper or lower right (2). If any required information is missing, the system displays the appropriate error message.

Please note that once submitted, users are not able to make changes unless the grant maker sends it back for revisions.



When the web form has been successfully submitted, the deliverable on the schedule shows the submitted date and the user that submitted the deliverable. Additionally, clicking the View icon in the View column displays all the information entered. If the grant maker has marked the deliverable as “Final”, “Final” is indicated in the Edit Status column. If the grant maker wants requires changes to the information after submission, they can return it to you for updates. If they ask for modifications, click the Edit icon in the Add column to access the report and work on it. Please remember to resubmit when ready.

Due Date	Deliverable Type	Assigned	Type Description	Deliverable Description	Date Submitted/User	Add	View	Delete	Status	Feedback
01/01/2016 12:00 AM	Annual Web Form	Vandana Vinay(PI)			12/10/2020 (Vinay, Vandana)				Submitted - Final	
01/01/2017 12:00 AM	Annual Web Form	Vandana Vinay(PI)			12/10/2020 (Vinay, Vandana)				Submitted - Final	
04/17/2018 12:00 AM	Other	Vandana Vinay(PI)	Other	test	04/18/2018 (Vinay, Vandana)				Submitted - Final	
12/10/2020 11:59 PM	Progress Report	Vandana Vinay(PI)	Progress Report						Due	

Budget Web Form

If there is a period notation in the Deliverable Type column, that is an indication that it is a Budget Web Form. To work on a Budget Web Form, click the Start link in the Add column.

Due Date	Deliverable Type	Assigned	Type Description	Deliverable Description	Date Submitted/User	Add	View	Delete	Status	Feedback
01/01/2022 12:00 AM	Progress Report	Stefanie Chernyakov(PI)	please complete the online web form.						Scheduled	
01/01/2023 12:00 AM	Progress Report	Stefanie Chernyakov(PI)	please complete the online web form.						Scheduled	
01/10/2023 12:00 AM	Financial Report (Period 1)	Stefanie Chernyakov(PI)	Please enter your expenses for the current budget period. Please upload any supporting documentation.						Scheduled	

This directs the relevant period in your budget as indicated by the period notation. See the View and Edit part of the Budget section for more information about how to complete and submit a budget.

When the Budget period report is successfully submitted, the deliverable on the schedule shows the submitted date and the user that submitted it (1). Additionally, clicking the View icon (2) in the View column redirects back to the budget. If the grant maker has marked the deliverable as “Final”, “Final” is indicated in the Edit Status column (3).

08/13/2013 1:47 PM	Signed Grant Agreement	Jamie Ross(PI)	Version 2	Version 2	11/29/2017 (McKee, Jamie)			Submitted - Final
08/01/2014 12:00 AM	Annual Progress Report	Jamie Ross(PI)	Please provide the requested information.		06/10/2015 (Ross, Jamie)			Submitted
09/01/2014 12:00 AM	Annual Financial Report	Jamie Ross(PI)	Please provide an update on the prior year's final expenditures. Use the Annual Financial Report template to complete this report.	Yr 1 financial report	1 12/30/2014 (Ross, Jamie)	2		3 Submitted - Final
12/30/2014 3:42 PM	Request for Transfer Institution	Jamie Ross(PI)	Here is the completed form you sent me.	Here is the completed form you sent me.	12/30/2014 (Ross, Jamie)			Submitted - Final
04/21/2015 10:58 AM	Copies of Organizational Approvals - IRB, IACUC, rDNA	Jamie Ross(PI)	IRB Approval	IRB Approval	04/21/2015 (Ross, Jamie)			Submitted - Final

If the grant maker requires changes to the budget after submission, they can return it for updates. If they require modifications, click the Start icon in the Add column to access the budget and work on it again. Please remember to resubmit when all changes are complete.

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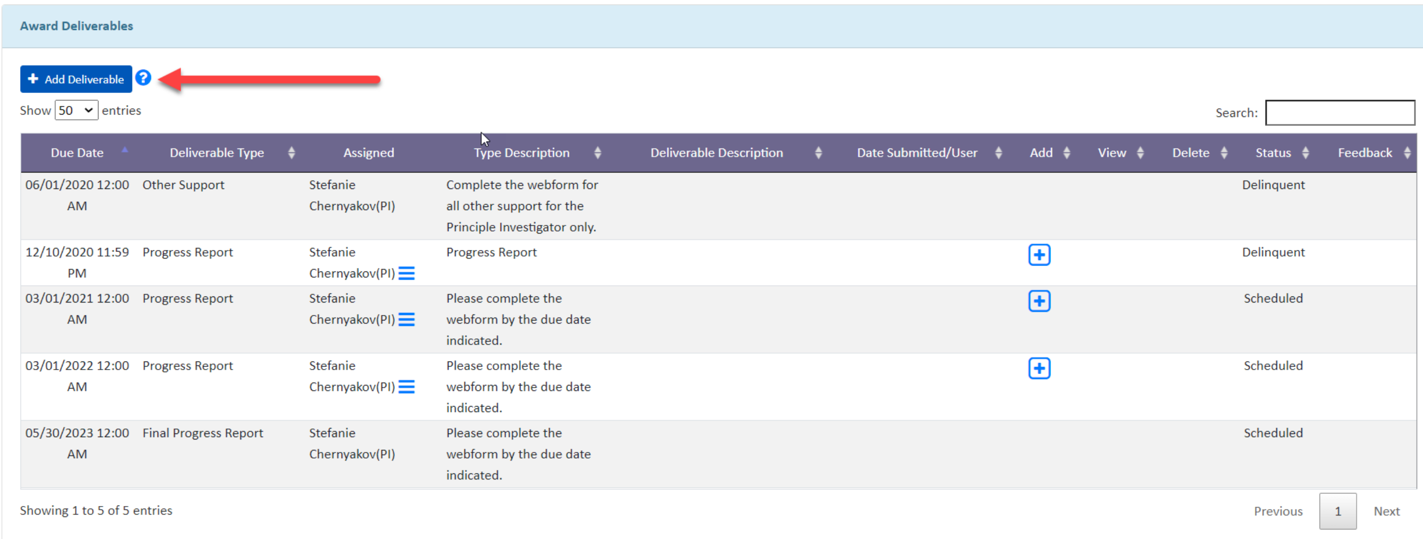
Submit a File Deliverable NOT Listed In The Schedule

To submit a deliverable that is not listed in the schedule, e.g. Request to Transfer, Add a Publication, click the Add Deliverable button the top of the table.



Award Deliverables

+ Add Deliverable

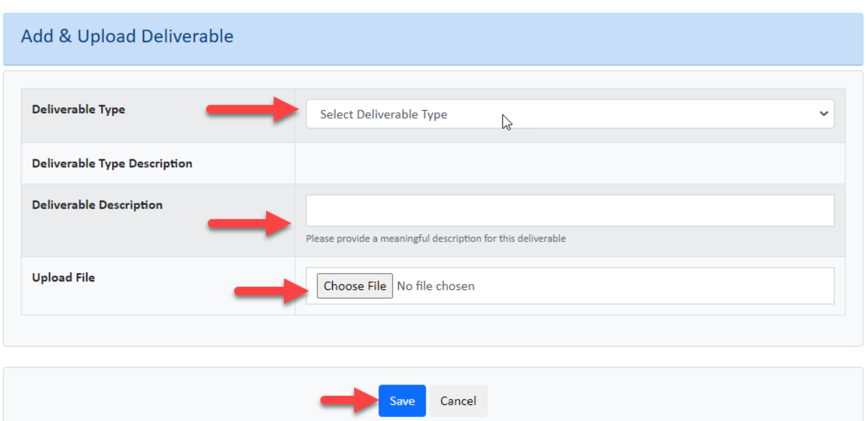
Show 50 entries   Search:

Due Date	Deliverable Type	Assigned	Type Description	Deliverable Description	Date Submitted/User	Add	View	Delete	Status	Feedback
06/01/2020 12:00 AM	Other Support	Stefanie Chernyakov(PI)	Complete the webform for all other support for the Principle Investigator only.						Delinquent	
12/10/2020 11:59 PM	Progress Report	Stefanie Chernyakov(PI)	Progress Report						Delinquent	
03/01/2021 12:00 AM	Progress Report	Stefanie Chernyakov(PI)	Please complete the webform by the due date indicated.						Scheduled	
03/01/2022 12:00 AM	Progress Report	Stefanie Chernyakov(PI)	Please complete the webform by the due date indicated.						Scheduled	
05/30/2023 12:00 AM	Final Progress Report	Stefanie Chernyakov(PI)	Please complete the webform by the due date indicated.						Scheduled	

Showing 1 to 5 of 5 entries   Previous 1 Next

Depending on the browser settings this either opens a new tab or a pop-up window. First, select the type of deliverable to add/upload (1). The grant maker has a pre-defined list of the allowable materials. If the item needed is not on the list, contact the grant maker using the correspondence feature. See the Send Correspondence to the Funding Organization section for more information on correspondence.

After selecting the type of deliverable, there is a notation indicating which file types (e.g. pdf) are allowed (2). Browse to select a file from your computer (3). Additionally, a description of the deliverable can be provided, if desired (4). When done, click the **Save** button (5).



When the document is successfully uploaded, the deliverable on the schedule displays the last submitted date and the user that submitted the deliverable. Additionally, the Add column has a Replace indication and clicking the View icon in the View column displays the file. To update the file, click the Replace icon and repeat the steps above. To delete the file, click Delete (trashcan) icon.

Due Date	Deliverable Type	Assigned	Type Description	Deliverable Description	Date Submitted/User	Add	View	Delete	Status	Feedback
02/15/2017 12:00 AM	Signed Grant Agreement	Jamie McKee(PI)	Upload a copy of the signed Grant Agreement.	Signed Grant Agreement	03/08/2017 (McKee, Jamie)	Replace			Submitted	

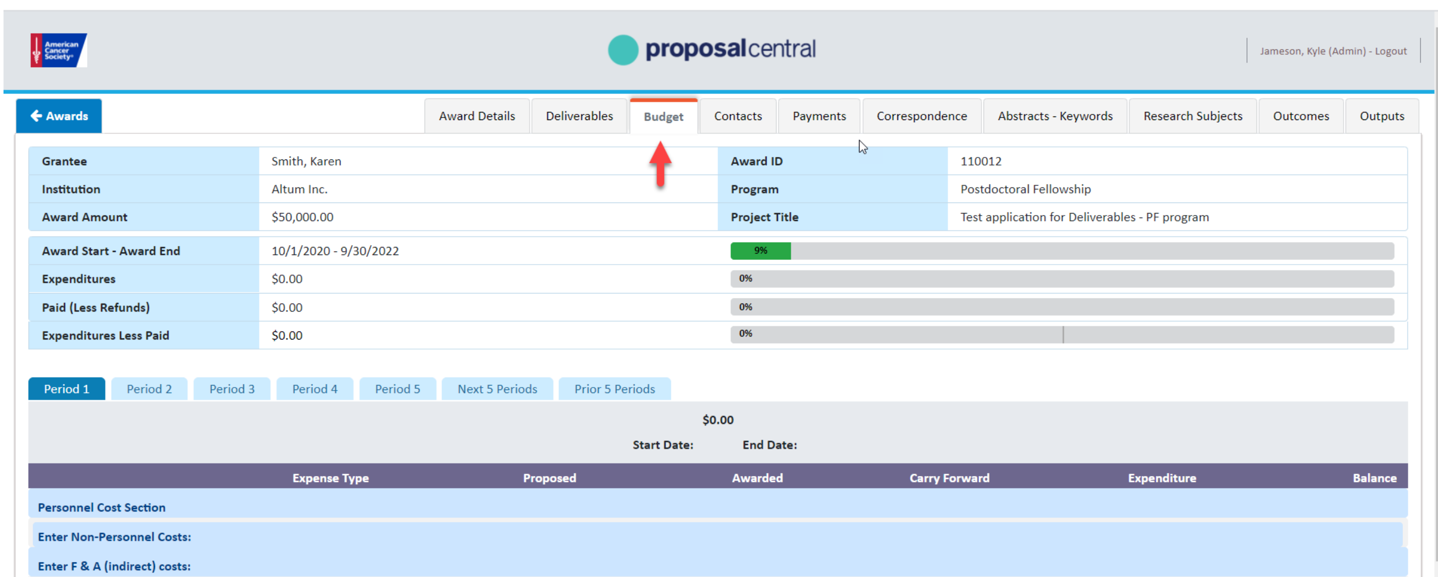
If the grant maker has marked the deliverable as "Final", "Final" is indicated in the Edit Status column. If the grant maker requires changes to the information after submission, they can return it for updates. If they ask for modifications, click the Edit icon in the Add column to access the report and work on it. Please remember to resubmit when complete.

Due Date	Deliverable Type	Assigned	Type Description	Deliverable Description	Date Submitted/User	Add	View	Delete	Status	Feedback
05/15/2013 12:00 AM	Revised Application Material	Jamie Ross(PI)	Provide New Project Plan Based on Review Feedback	Project Description Version 1	12/08/2017 (McKee, Jamie)				Submitted - Final	

Budget

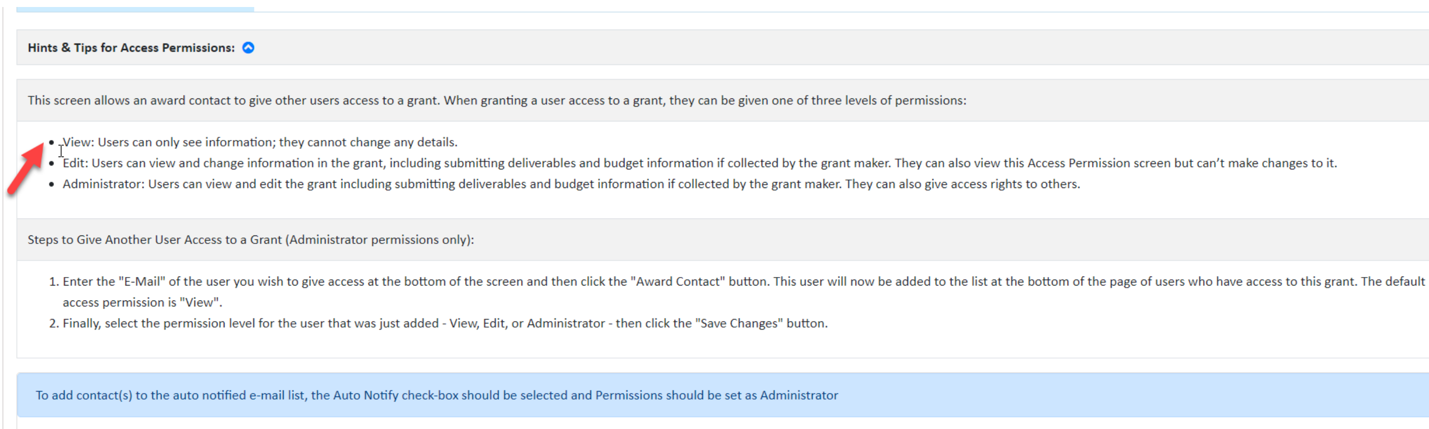
Access

Depending on the funding organization, grantees may be able to view the budget or make changes to the budget sections. If the funding organization provided access to the award budget, the information on the Budget tab is editable. Other funding organizations may choose to provide access to updating budget information through a Budget Deliverable.



View and Edit

At the top of the screen is the award information. If the grant maker has elected to provide instructions, those are displayed at the top.



The second part of the screen shows the budget information for the award. Some organizations collect only a summary of the budget and others collect line item details. The screenshots below reflect a summary budget; however, the same concepts apply to a budget that includes line items. You can access the different budget periods by clicking the period tabs at the top of the budget.

The funding organization has the ability to allow grantees to edit/add information, but depending on their preferences that option may not be available. If applicable, make sure to periodically click the **Save Changes** button to retain all changes.

If the funding organization has allowed edit/add capabilities, here are the different columns that may be editable (note – it may be possible to edit some of these columns, but not others):

1. Expense Type*
2. Awarded
3. Carry Forward
4. Expenditure
5. Notes – Please note that the Notes column, if available, is accessed by clicking the Add Notes link under the Expenditure column label. If the Add Notes link has a red asterisk (*) that means a note must be entered for every line in order to submit the budget period.

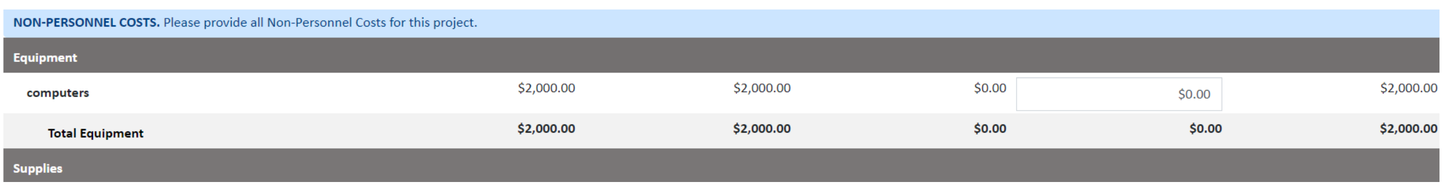
Save Changes | Cancel | To retain changes you MUST Save Changes before leaving this Period. | Submit Period to Grant Maker as Final

Budget: $21,500.00 **Working Budget:** $21,500.00 **Spent:** $4,000.00 **Balance:** $17,500.00
Start Date: 1/1/2020 **End Date:** 1/1/2021

	Proposed	Awarded	Carry Forward	Expenditure Add Notes	Balance
PERSONNEL COSTS. Please provide all Personnel Costs for this project. Applicant organization only. Enter dollar amounts requested (omit cents) for salary requested and fringe benefits.					
Randy Hemmig (Consultant)					
Appt Months	6	6	0	0	
Inst. Base Salary	$5,000.00	$5,000.00	$0.00	$0.00	
Salary Requested	$10,000.00	$10,000.00	$0.00	$0.00	$10,000.00
Fringe Benefits	$500.00	$500.00	$0.00	$0.00	$500.00
Total	**$10,500.00**	**$10,500.00**	**$0.00**	**$0.00**	**$10,500.00**
Sub Total PERSONNEL COSTS. Please provide all Personnel Costs for this project. Applicant organization only. Enter dollar amounts requested (omit cents) for salary requested and fringe benefits.	$10,500.00	$10,500.00	$0.00	$0.00	$10,500.00

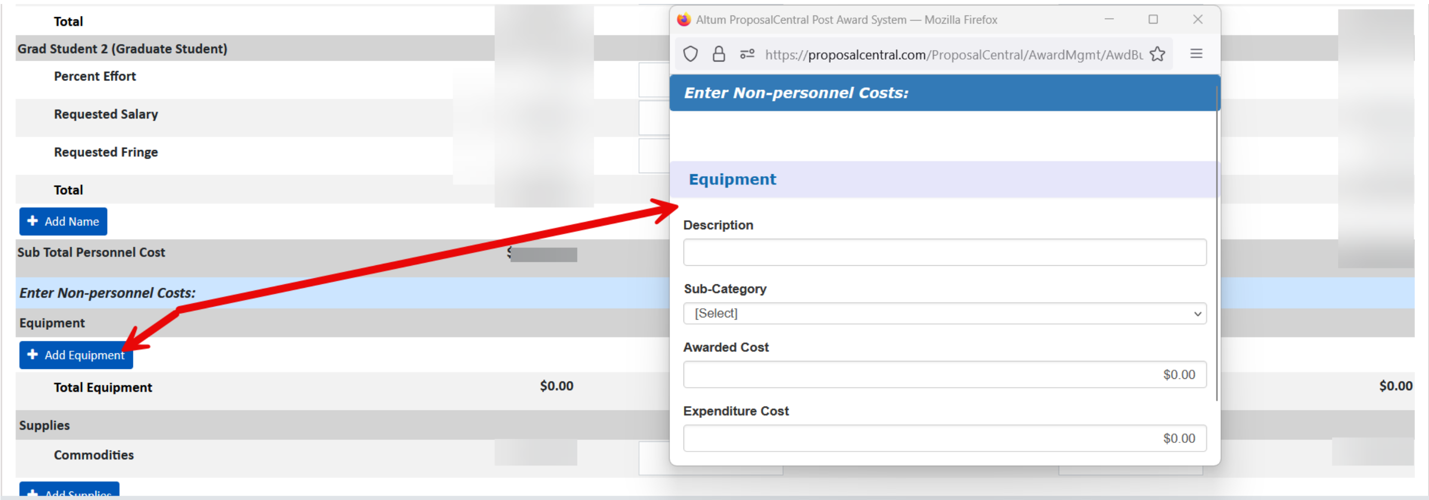
*If the grant maker has allowed grantees to add lines to their budgets, then one of these options is displayed:

- **A blank row to add the label if the budget is only at the summary level.** Make sure to click the **Save Changes** button to save the addition. Whether or not Awarded, Carry Forward, Expenditure, or Notes for the line can be modified depends on whether or not the grant maker has made those values editable.



NON-PERSONNEL COSTS. Please provide all Non-Personnel Costs for this project.					
Equipment					
computers	$2,000.00	$2,000.00	$0.00	$0.00	$2,000.00
Total Equipment	**$2,000.00**	**$2,000.00**	**$0.00**	**$0.00**	**$2,000.00**
Supplies					

- **An Add link to add the line item if the budget is collecting line item details.** When you click the Add link a pop-up will appear asking to supply the label. In addition to the label, there may be other values to add, for example a role for personnel lines or sub-category for non-personnel lines. Whether or not it is possible to add Awarded, Carry Forward, or Expenditure amounts for the line depends on whether or not the grant maker has made those values editable. Click the **Save** button to save all changes. After clicking **Save**, a **Close** button appears. Click the **Close** button to close the pop-up. If the grant maker has allowed the option to add Notes to the line items, it is possible to add a note to the new line item.



The grant maker has the ablity to request an electronic signature (aka e-signature) If the e-signature is:

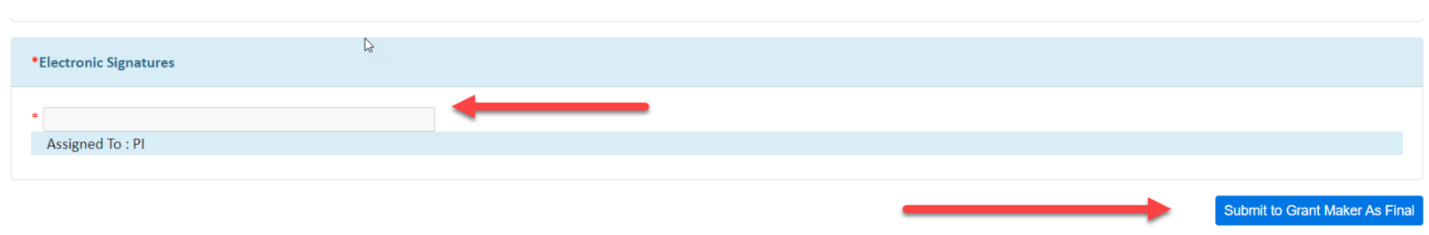
- **__Required__** - There is a red asterisk (*) next to the e-signature label. Additionally, when the e-signature is saved, it also submits the budget. Therefore, make sure the budget is complete with no errors before the signature is entered as the budget is submitted at that time.

- **__Optional__** – Awardees may opt to submit the budget without adding a signature by using the **Submit Period to Grant Maker as Final** button at the top. However, __if you do opt to include a signature__, when the e-signature is saved, it also submits the budget. Therefore, make sure the budget is complete with no errors before the signature is entered as the budget is submitted at that time.

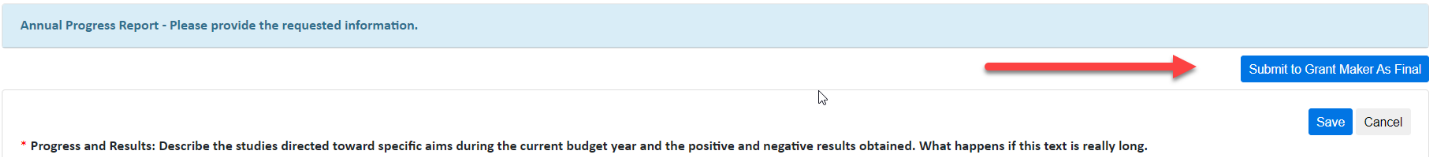
Please note that the system records the name of the user that clicks the **Save Signature and Submit** button. This allows the grant makers to ensure that the e-signature entered matches the profile of the user who actually entered it.

If the grant maker has provided any guidance, instructions, certifications below the e-signature field, make sure to read and follow. If the user who needs to submit the e-signature does not have access to the grant, see the Contacts and Access section for information on how to provide him/her access to the grant so he/she can e-sign.

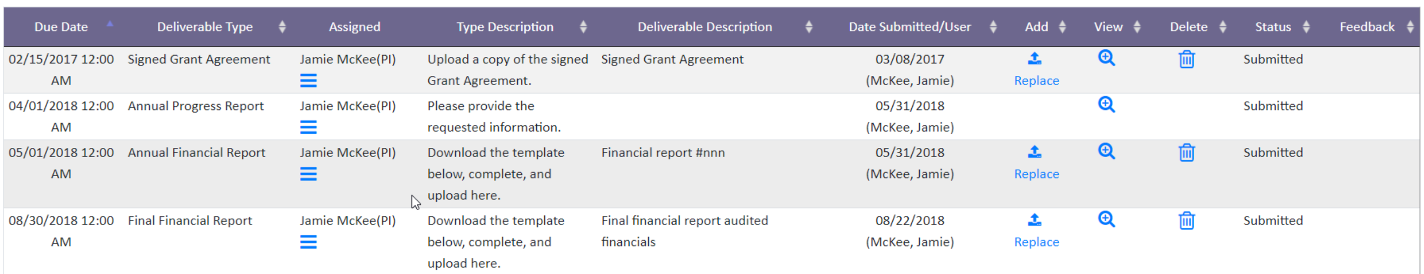
__Example of Text E-Signature:__



If the budget does NOT include an e-signature or it's optional and you choose not to provide one, when you have completed working on the budget period and are ready to submit it to the grant maker, click the **Submit Period to Grant Maker as Final** button. If the grant maker collected Notes and there are errors in the Notes column, the errors are displayed. Once submitted for the period successfully, it displays as read-only and no further changes are possible unless the grant maker permits it.



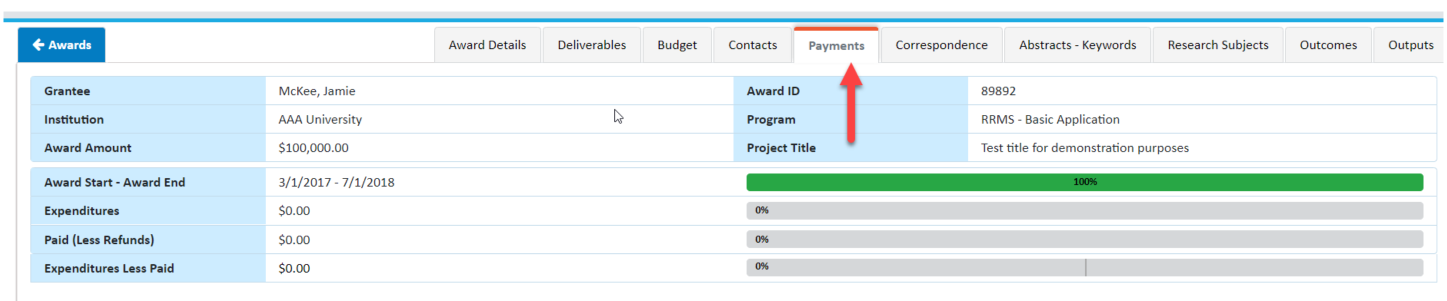
If the completion of the budget is connected to the submission of a deliverable, a row in the table of deliverables for the report is indicated. The row includes who submitted the budget information and when. Clicking the View icon redirects to the budget period indicated in parenthesis in the Deliverable Type column. See the Deliverables section for more information on deliverables.



Due Date	Deliverable Type	Assigned	Type Description	Deliverable Description	Date Submitted/User	Add	View	Delete	Status	Feedback
02/15/2017 12:00 AM	Signed Grant Agreement	Jamie McKee(PI)	Upload a copy of the signed Grant Agreement.	Signed Grant Agreement	03/08/2017 (McKee, Jamie)	Replace			Submitted	
04/01/2018 12:00 AM	Annual Progress Report	Jamie McKee(PI)	Please provide the requested information.		05/31/2018 (McKee, Jamie)				Submitted	
05/01/2018 12:00 AM	Annual Financial Report	Jamie McKee(PI)	Download the template below, complete, and upload here.	Financial report #nnn	05/31/2018 (McKee, Jamie)	Replace			Submitted	
08/30/2018 12:00 AM	Final Financial Report	Jamie McKee(PI)	Download the template below, complete, and upload here.	Final financial report audited financials	08/22/2018 (McKee, Jamie)	Replace			Submitted	

View Payments

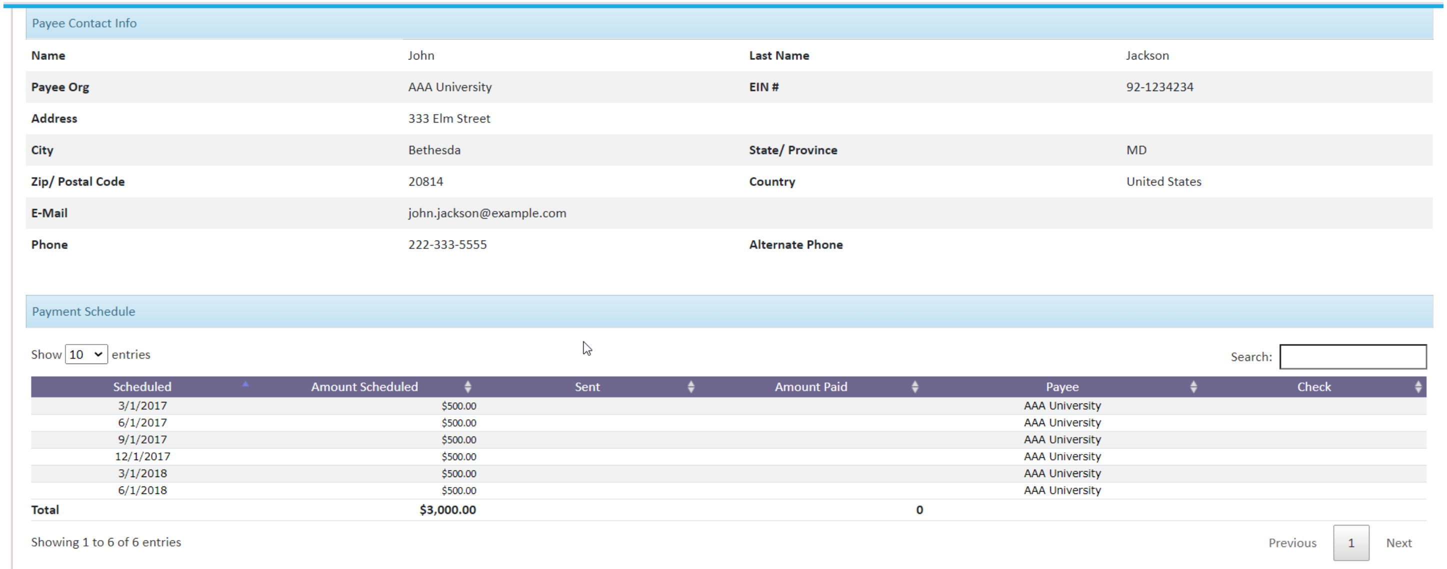
To view the payments related to the award, click the Payments tab in the award record.



The top of the page displays information regarding the current payee for the grant. Below the payee details is a table showing all scheduled payments in ProposalCentral, along with an indication of whether or not the payments are paid. If the payments have been paid and the grant maker has entered the payment information, the amount paid and date paid are also included.

TIP: If the payment schedule is showing payments not paid with dates in the past, we recommend checking the deliverable schedule to determine if there is a required report that is late.

CUSTOMER SUPPORT:
800-875-2562 (Toll-free U.S. & Canada)
+1-703-964-5840 (Direct Dial International)
pcsupport@altum.com


Payee Contact Info

Name	John	**Last Name**	Jackson
Payee Org	AAA University	**EIN #**	92-1234234
Address	333 Elm Street		
City	Bethesda	**State/ Province**	MD
Zip/ Postal Code	20814	**Country**	United States
E-Mail	john.jackson@example.com		
Phone	222-333-5555	**Alternate Phone**	

Payment Schedule

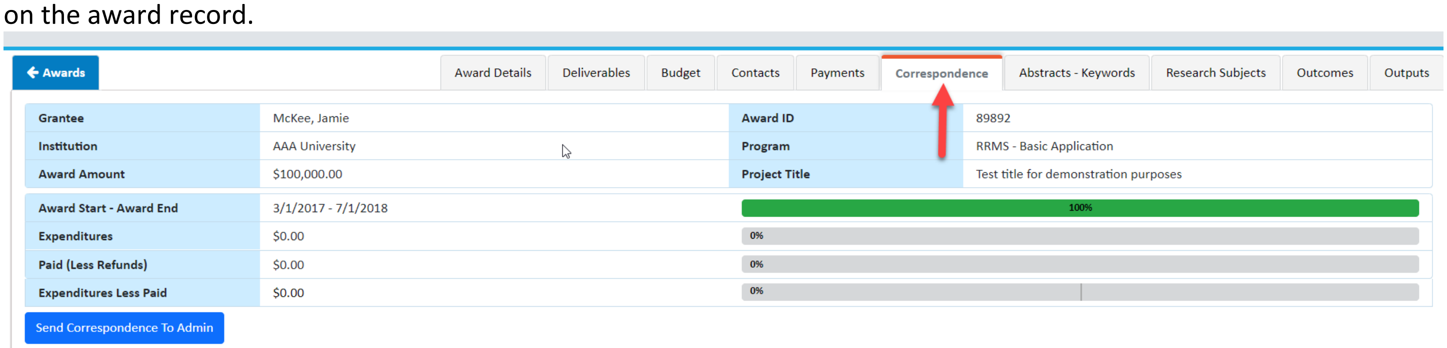
Show 10 entries Search:

Scheduled	Amount Scheduled	Sent	Amount Paid	Payee	Check
3/1/2017	$500.00			AAA University	
6/1/2017	$500.00			AAA University	
9/1/2017	$500.00			AAA University	
12/1/2017	$500.00			AAA University	
3/1/2018	$500.00			AAA University	
6/1/2018	$500.00			AAA University	
Total	**$3,000.00**		**0**		

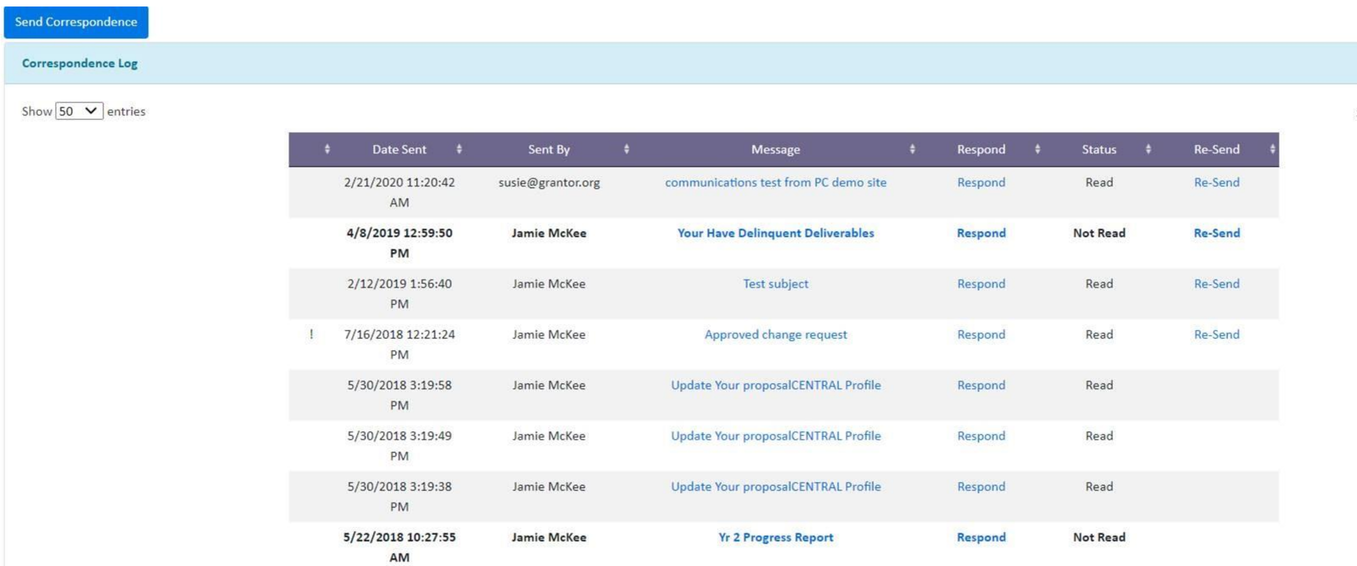
Showing 1 to 6 of 6 entries Previous 1 Next

Send Correspondence to the Funding Organization

To send correspondence to the funding organization or read correspondence sent to you, click the Correspondence tab on the award record.



From this page, any correspondence that has been sent within ProposalCentral is available clicking the blue link in the *Message* column (1). Use the Respond link to respond directly to a message (2). To initiate a new message, click the Send Correspondence to Admin button at the top (3).



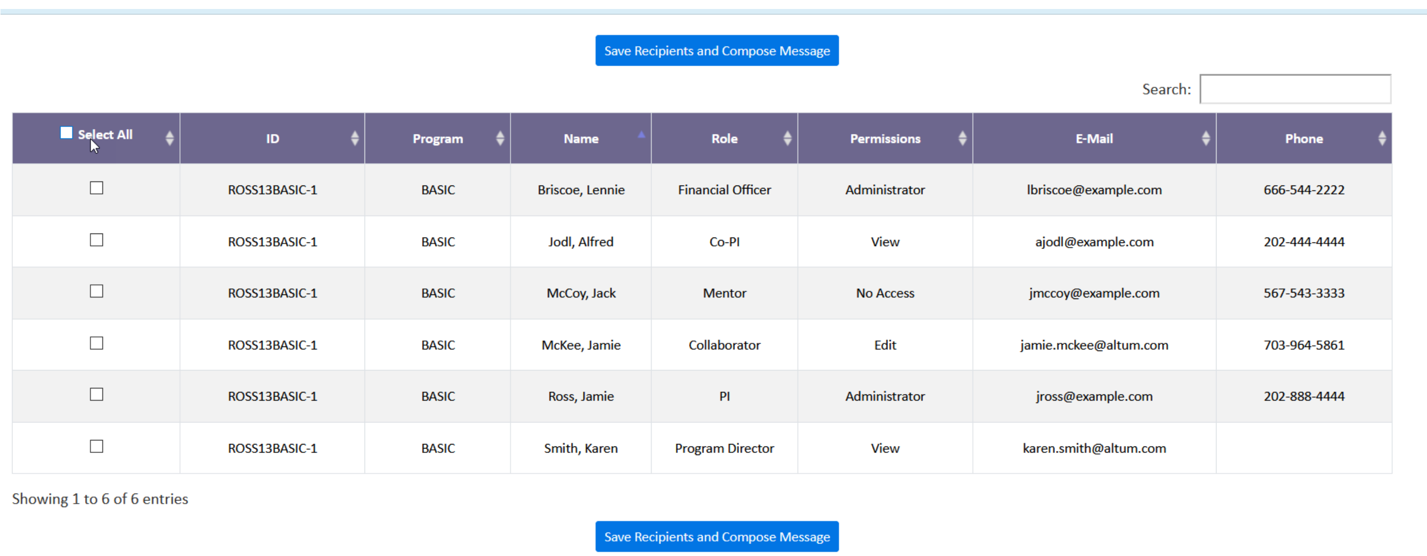
Send Correspondence

Correspondence Log

Show 50 entries

	Date Sent	Sent By	Message	Respond	Status	Re-Send
	2/21/2020 11:20:42 AM	susie@grantor.org	communications test from PC demo site	Respond	Read	Re-Send
	4/8/2019 12:59:50 PM	**Jamie McKee**	**Your Have Delinquent Deliverables**	**Respond**	**Not Read**	**Re-Send**
	2/12/2019 1:56:40 PM	Jamie McKee	Test subject	Respond	Read	Re-Send
!	7/16/2018 12:21:24 PM	Jamie McKee	Approved change request	Respond	Read	Re-Send
	5/30/2018 3:19:58 PM	Jamie McKee	Update Your proposalCENTRAL Profile	Respond	Read	
	5/30/2018 3:19:49 PM	Jamie McKee	Update Your proposalCENTRAL Profile	Respond	Read	
	5/30/2018 3:19:38 PM	Jamie McKee	Update Your proposalCENTRAL Profile	Respond	Read	
	5/22/2018 10:27:55 AM	**Jamie McKee**	**Yr 2 Progress Report**	**Respond**	**Not Read**	

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



Save Recipients and Compose Message

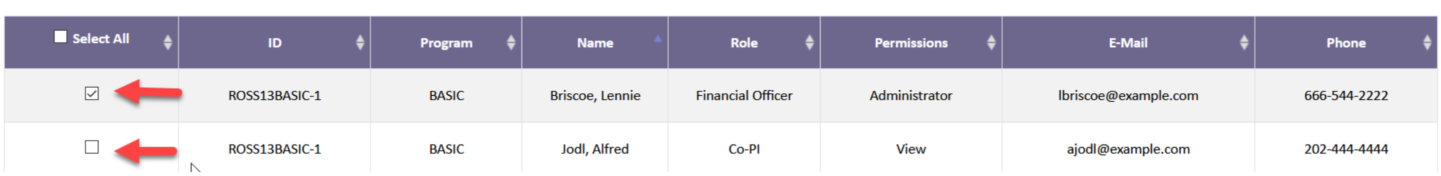
Search:

Select All	ID	Program	Name	Role	Permissions	E-Mail	Phone
☐	ROSS13BASIC-1	BASIC	Briscoe, Lennie	Financial Officer	Administrator	lbriscoe@example.com	666-544-2222
☐	ROSS13BASIC-1	BASIC	Jodl, Alfred	Co-PI	View	ajodl@example.com	202-444-4444
☐	ROSS13BASIC-1	BASIC	McCoy, Jack	Mentor	No Access	jmccoy@example.com	567-543-3333
☐	ROSS13BASIC-1	BASIC	McKee, Jamie	Collaborator	Edit	jamie.mckee@altum.com	703-964-5861
☐	ROSS13BASIC-1	BASIC	Ross, Jamie	PI	Administrator	jross@example.com	202-888-4444
☐	ROSS13BASIC-1	BASIC	Smith, Karen	Program Director	View	karen.smith@altum.com	

Showing 1 to 6 of 6 entries

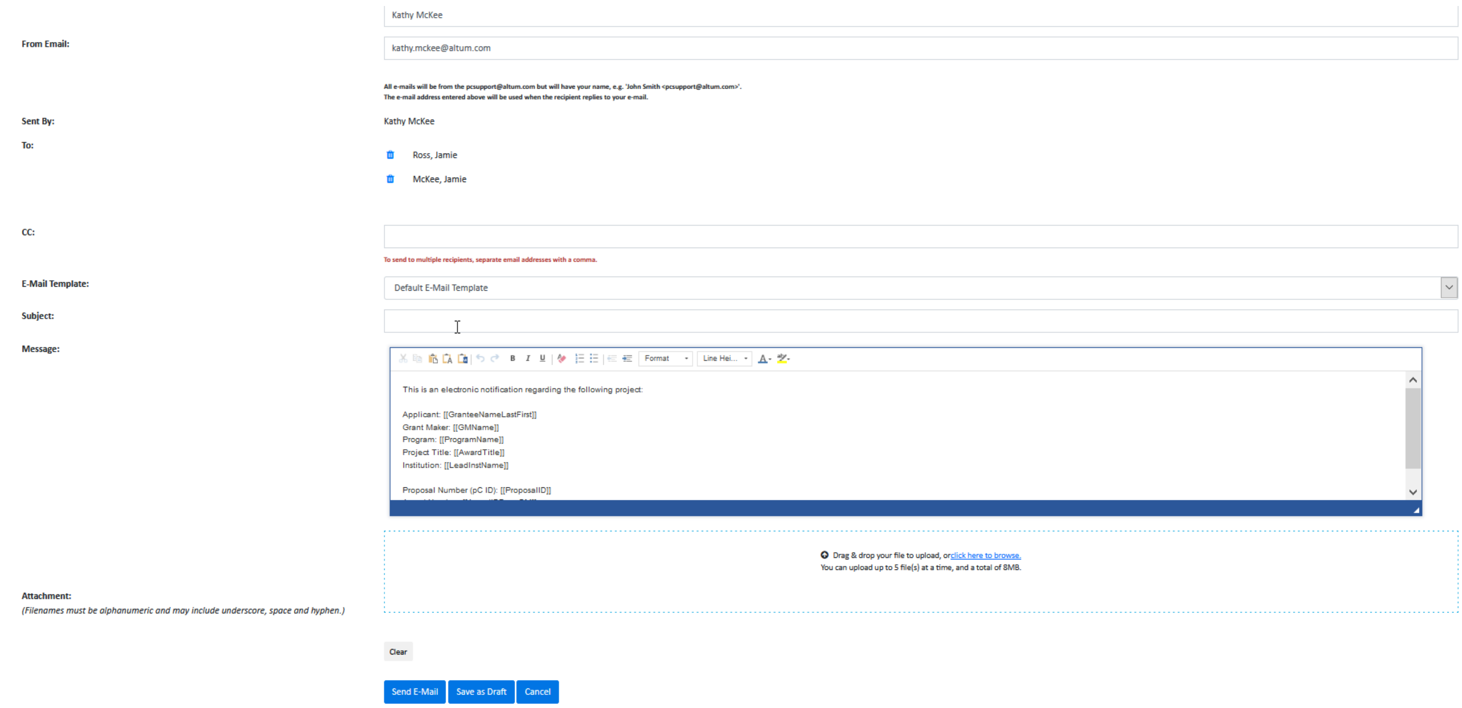
Save Recipients and Compose Message

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



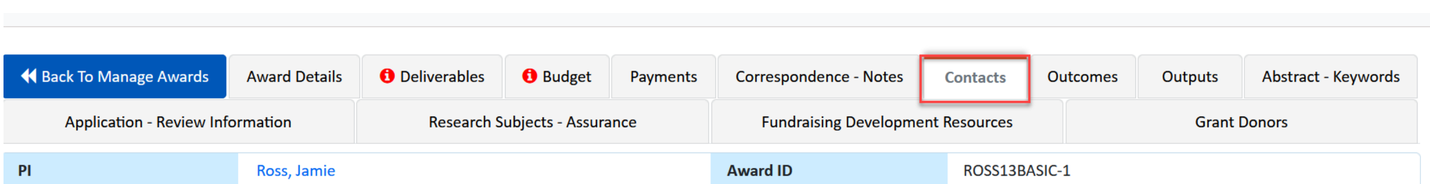
Select All	ID	Program	Name	Role	Permissions	E-Mail	Phone
☑	ROSS13BASIC-1	BASIC	Briscoe, Lennie	Financial Officer	Administrator	lbriscoe@example.com	666-544-2222
☐	ROSS13BASIC-1	BASIC	Jodl, Alfred	Co-PI	View	ajodl@example.com	202-444-4444

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



Contacts and Access

It is possible t add contacts to your grant (e.g. administrative assistant, collaborator, sponsored research official, etc.) and provide access to the award, if necessary. Depending on the access level, contacts can submit deliverables, provide electronic signatures, send e-mails, submit expenditures, view payments, etc. To add a contact or provide a contact access to the award, click the Contacts & User Access tab from the award record.

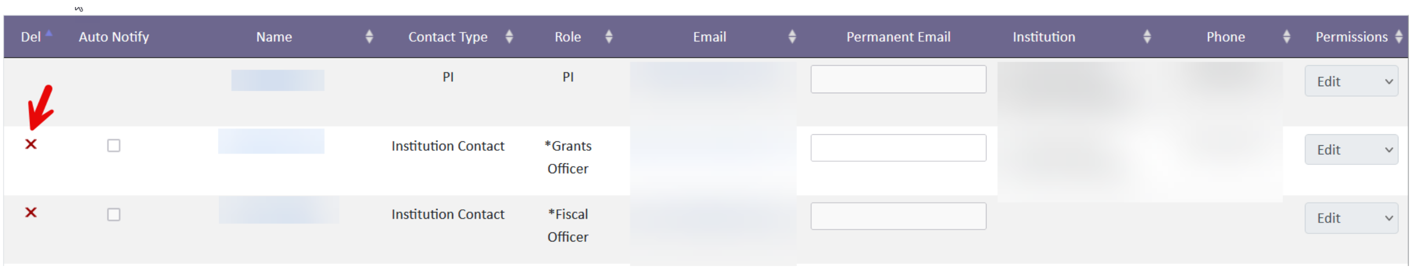


If the application was submitted through ProposalCentral, the PI, institution contacts, and key personnel entered in the application are already listed. Additionally, the users that had access to the application continue to have access to the award with the same permission level. If the user was listed as an organizational official or key personnel but did not have access to the application, they are listed with "No Access" on the award.

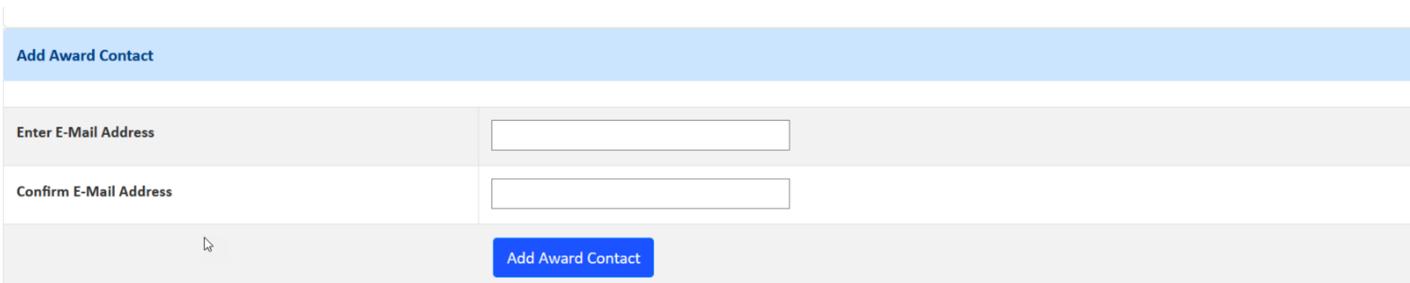
The following sections describe how to add/remove a contact and change access levels.

Add or Remove A Contact

To remove a contact, click the **X** in the Del column. A pop-up asks for confirmation of the deletion. Click the **Ok** button to proceed with the deletion and **Cancel** to retain the contact.



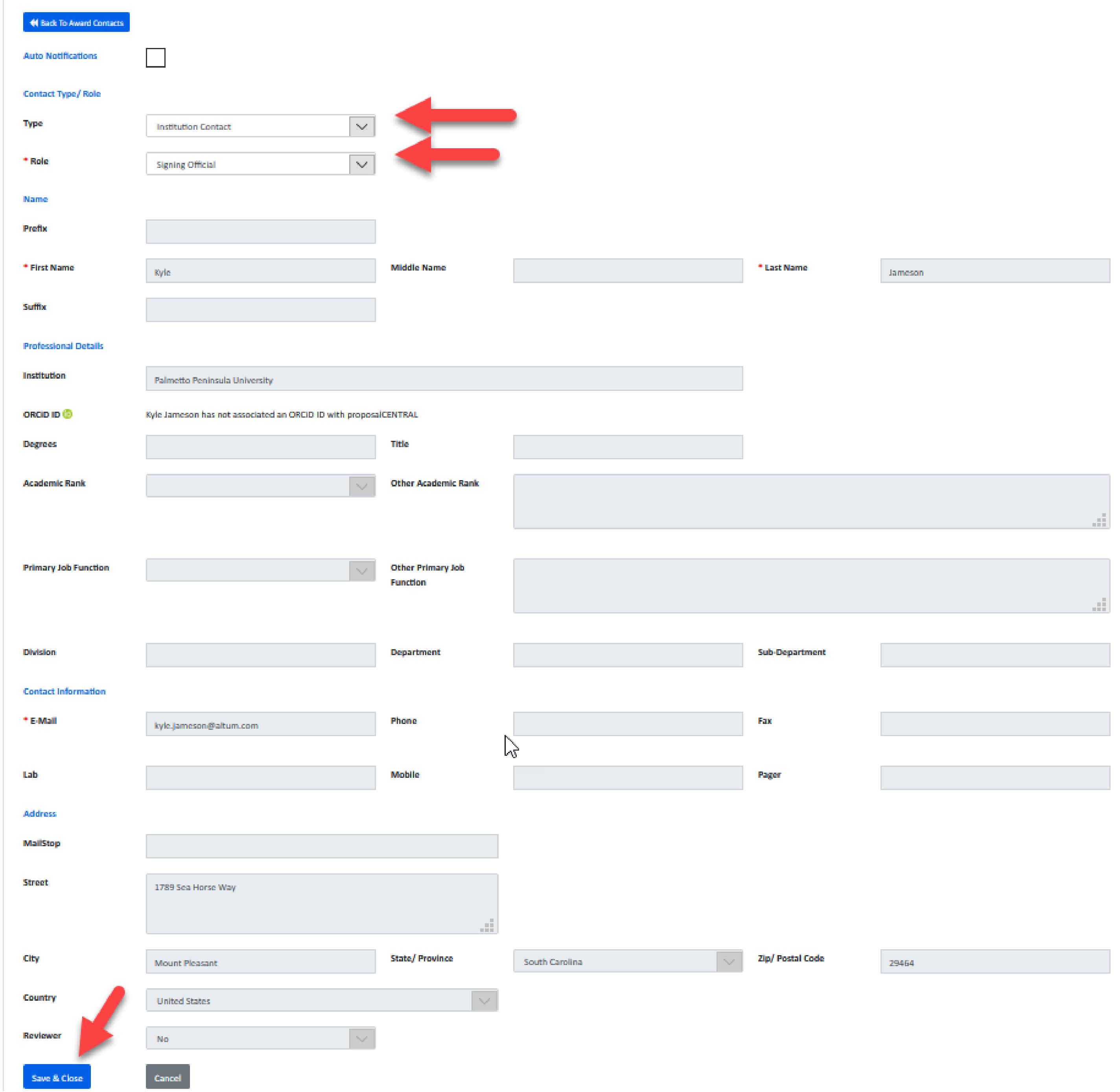
To add a new contact, enter the person's e-mail address twice (1) and click the **Add Award Contact** button (2).



If the person is already registered with ProposalCentral, the *Add Contact* detail screen is populated with their contact information. Select their contact type (e.g. Key Personnel) and enter the role (e.g. Collaborator). When done, click the **Save & Close** button. Please note that changes to the contact information cannot be made from this screen for existing users. If the information is incorrect, please contact the person and have them update their ProposalCentral profile.

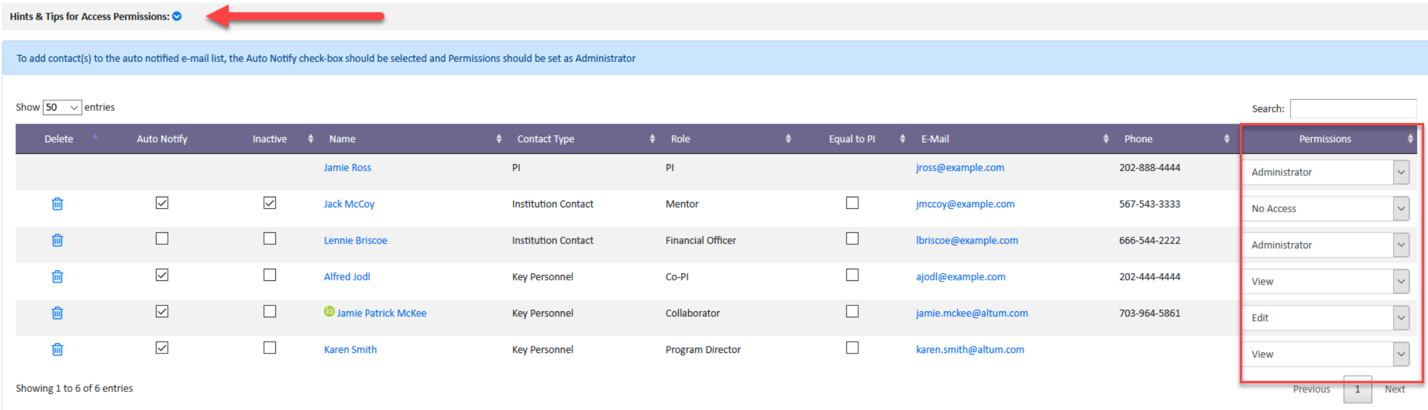
If the person is NOT registered with ProposalCentral, the *Add Contact* detail screen is blank. Select their contact type (e.g. Key Personnel), enter the role (e.g. Collaborator), and provide the appropriate contact information. When done, click the **Save & Close** button.

When adding new users, an account and profile is automatically created in ProposalCentral. The person receives an email (at the email address you entered) explaining how to access and update their contact information in ProposalCentral.



Update Access Level

To update a contact's permission level, select the appropriate level from the drop-down menu in the Permissions column (1) and click the **Save Changes** button (2). To learn about the different types of permissions, click the Hints & Tips for Access Permissions link (3).


Hints & Tips for Access Permissions:

To add contact(s) to the auto notified e-mail list, the Auto Notify check-box should be selected and Permissions should be set as Administrator

Show 50 entries

Search:

Delete	Auto Notify	Inactive	Name	Contact Type	Role	Equal to PI	E-Mail	Phone	Permissions
			Jamie Ross	PI	PI		jross@example.com	202-888-4444	Administrator
	☑	☑	Jack McCoy	Institution Contact	Mentor	☐	jmccoy@example.com	567-543-3333	No Access
	☐	☐	Lennie Briscoe	Institution Contact	Financial Officer	☐	lbriscoe@example.com	666-544-2222	Administrator
	☑	☐	Alfred Jodl	Key Personnel	Co-PI	☐	ajodl@example.com	202-444-4444	View
	☑	☐	Jamie Patrick McKee	Key Personnel	Collaborator	☐	jamie.mckee@altum.com	703-964-5861	Edit
	☑	☐	Karen Smith	Key Personnel	Program Director	☐	karen.smith@altum.com		View

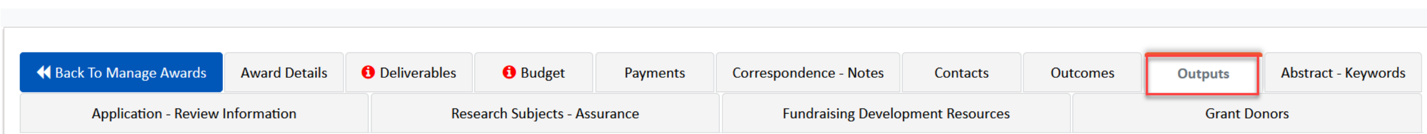
Showing 1 to 6 of 6 entries

Previous 1 Next

Users with access to your grant follow the same steps to login and access the award details link located in the in awarded section of the manage proposals tab.

Outcome Reporting

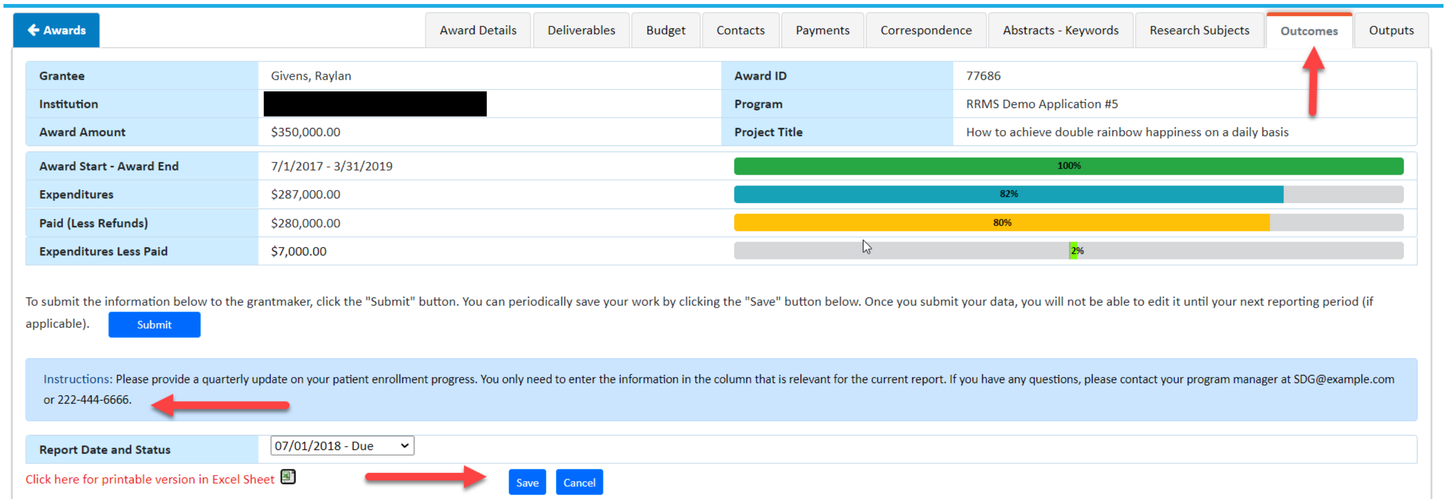
If the funder collected anticipated outcomes during the application process using ProposalCentral's Outcome feature, they may collect reports on actual outcomes during post-award. And, if they do, they *may* utilize ProposalCentral's Post-Award Outcomes feature. If they do, the Outcomes tab in the award record is accessible. If the tab is not invoked in the award record, you can skip this section.



If the Outcomes tab is enabled, clicking the tab displays the Outcome reporting. At the top of the screen is the award information. If the grant maker has elected to provide instructions, they are also included here. Additionally, the header has a drop-down menu listing all required report deadlines. The dates refer to the date the report is due and the statuses are:

- **Due** – Grantee has not submitted the report.
- **Pending** – Grantee has submitted the report, but the grant maker has not marked it as final.
- **Final** – Grantee has submitted the report and the grant maker has marked it as final.

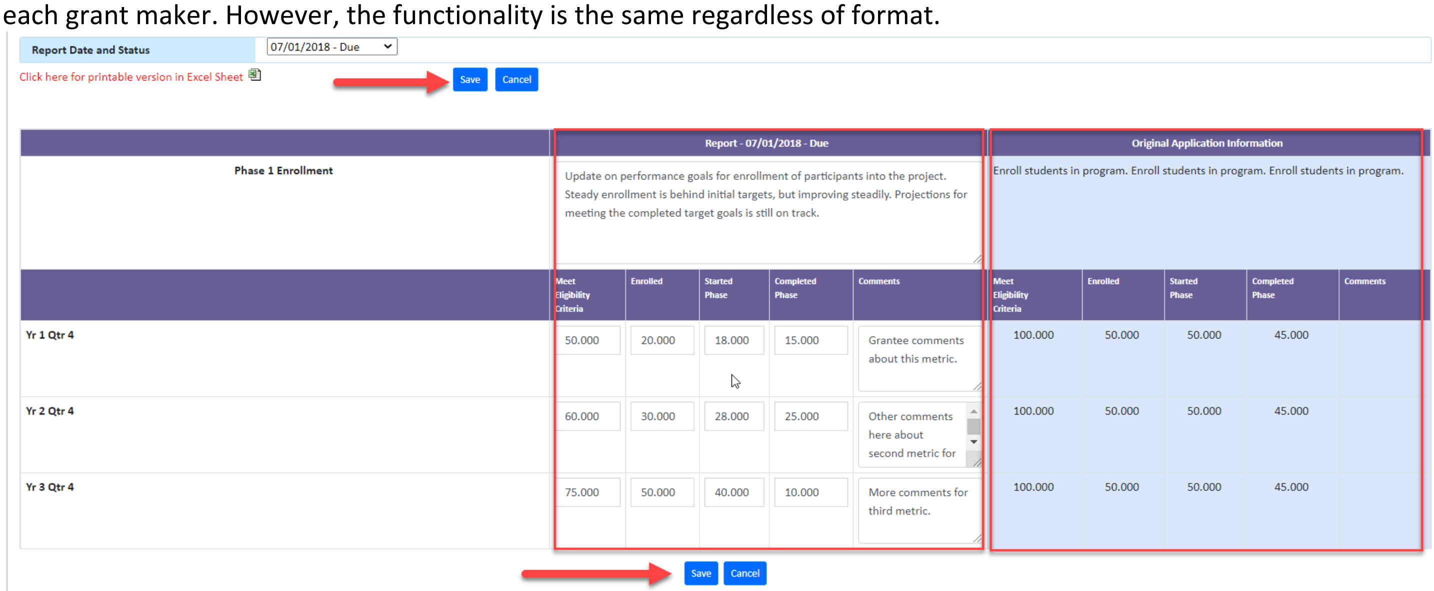
CUSTOMER SUPPORT:
800-875-2562 (Toll-free U.S. & Canada)
+1-703-964-5840 (Direct Dial International)
pcsupport@altum.com



When a selection from the drop-down menu is made, the appropriate report displays below. The information entered in the application displays on the right (1). The left side is either blank if it is the first time accessing the report or shows the information last saved/submitted (2). If working on the report, enter the information on the left side and click the **Save** button to retain changes (3).

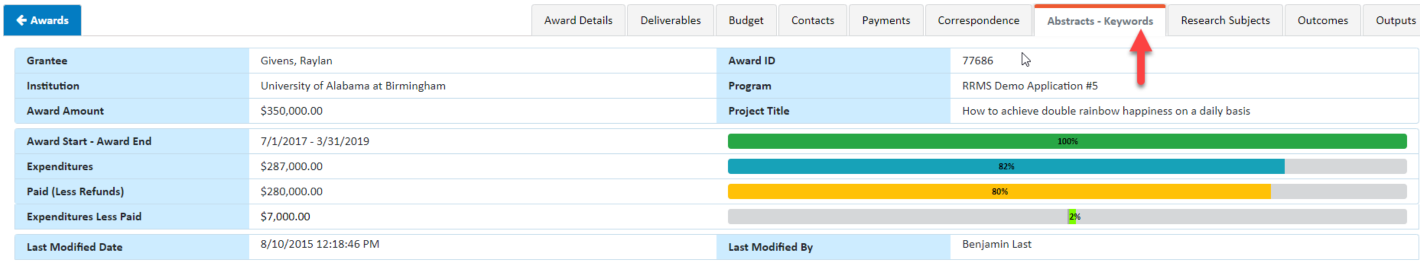
When the report is complete, click the **Submit** button (4). Once the information is submitted, it displays as read-only and is represented as the information associated with that report deadline. To export the report to Excel, click the Excel icon (5).

The following screenshot is an example of an Outcomes report; it is likely that the specific format is very different for each grant maker. However, the functionality is the same regardless of format.

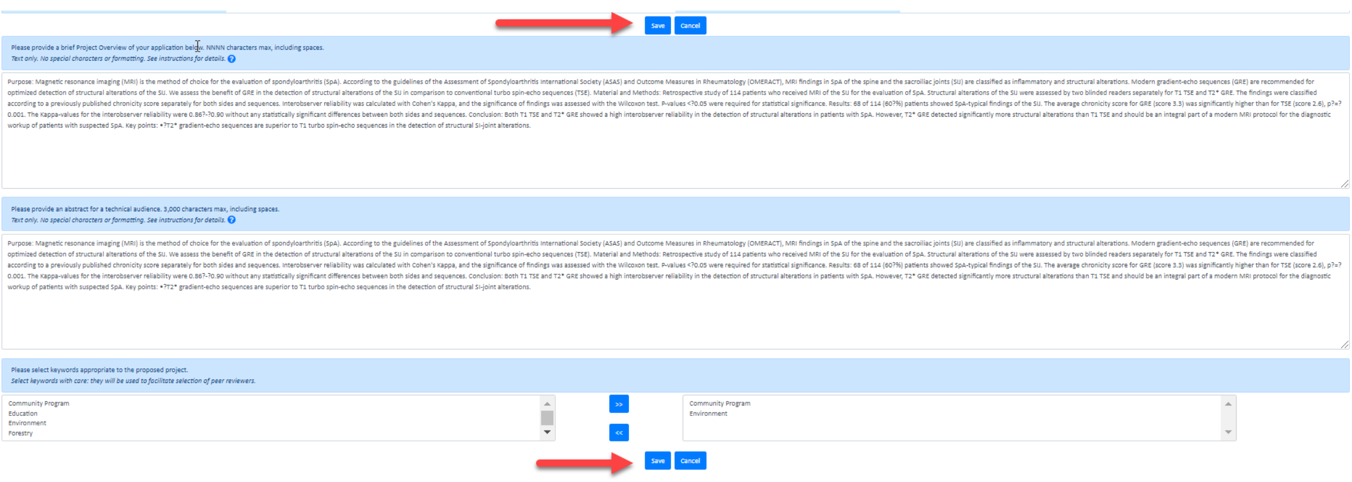


Abstract & Keywords

If the funder collected abstracts and keywords during the application process using ProposalCentral's abstract and keyword fields, the information is available in post-award by clicking the Abstract & Keywords tab the award record.

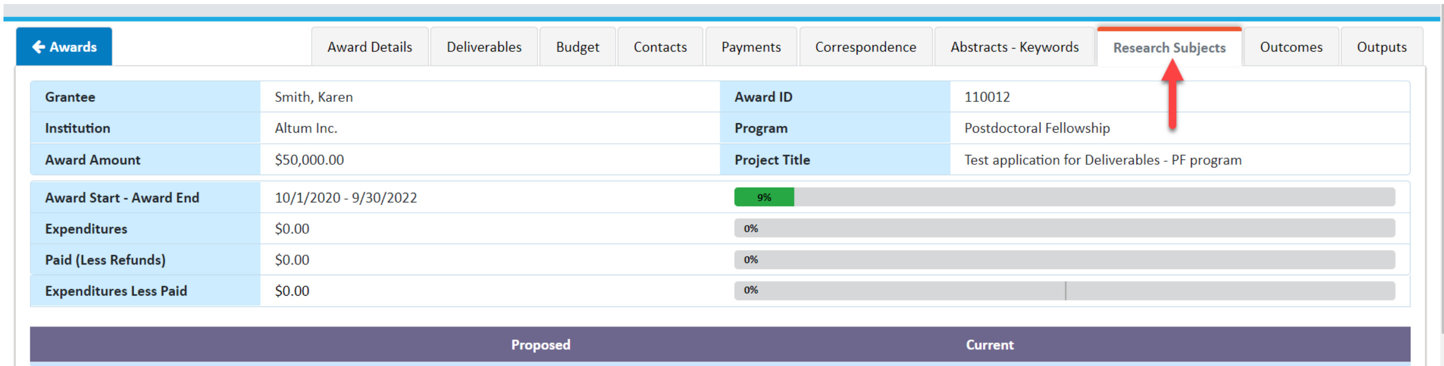


Some funders allow grantees to update the abstract and keywords. If invoked, grantees are able to make changes and click the **Save** button to retain. If the information is not editable, then grantees are only be able to review it. The following is an example of when the grantee can edit the information.



Research Subjects & Assurance

If the funder collected organization assurance information (e.g. IRB/IACUC/rDNA approvals) during the application process using ProposalCentral's organizational assurance section, the information is available in post-award by clicking the Research Subjects & Assurance tab in the award record.



If this feature is utilized, grantees are able to review the information submitted in the application and the information the grant maker currently has for the award. If the information is out of date, iwe recommend that grantees notify the grant maker using the correspondence feature. See the Send Correspondence to the Funding Organization section for more information on correspondence.