

December 2020

How to Register your Institution with ProposalCentral

How to Register your Institution with ProposalCentral

The Institution Profile is created once by the appropriate institution official. The institution information is then available to all applicants when preparing and submitting proposals. This makes the application process easier for the applicants and ensures that the grant makers receive consistent, accurate institution information in applications.

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Create An Account

The administrator for the Institution Profile needs to create an account on ProposalCentral. To do this:

1. Go to <https://proposalcentral.com/> and click the orange “CREATE ONE NOW!” button under the Application Login.

Welcome to ProposalCentral

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



Click here to learn more about the ProposalCentral platform and community.

APPLICATION LOGIN

Username


Username or E-mail

Password

Password

[Forgot Your Password?](#)

LOGIN

 LOGIN using ORCID

[Need an account?](#)

CREATE AN ACCOUNT NOW

REVIEWER LOGIN

CLICK FOR REVIEWER LOGIN

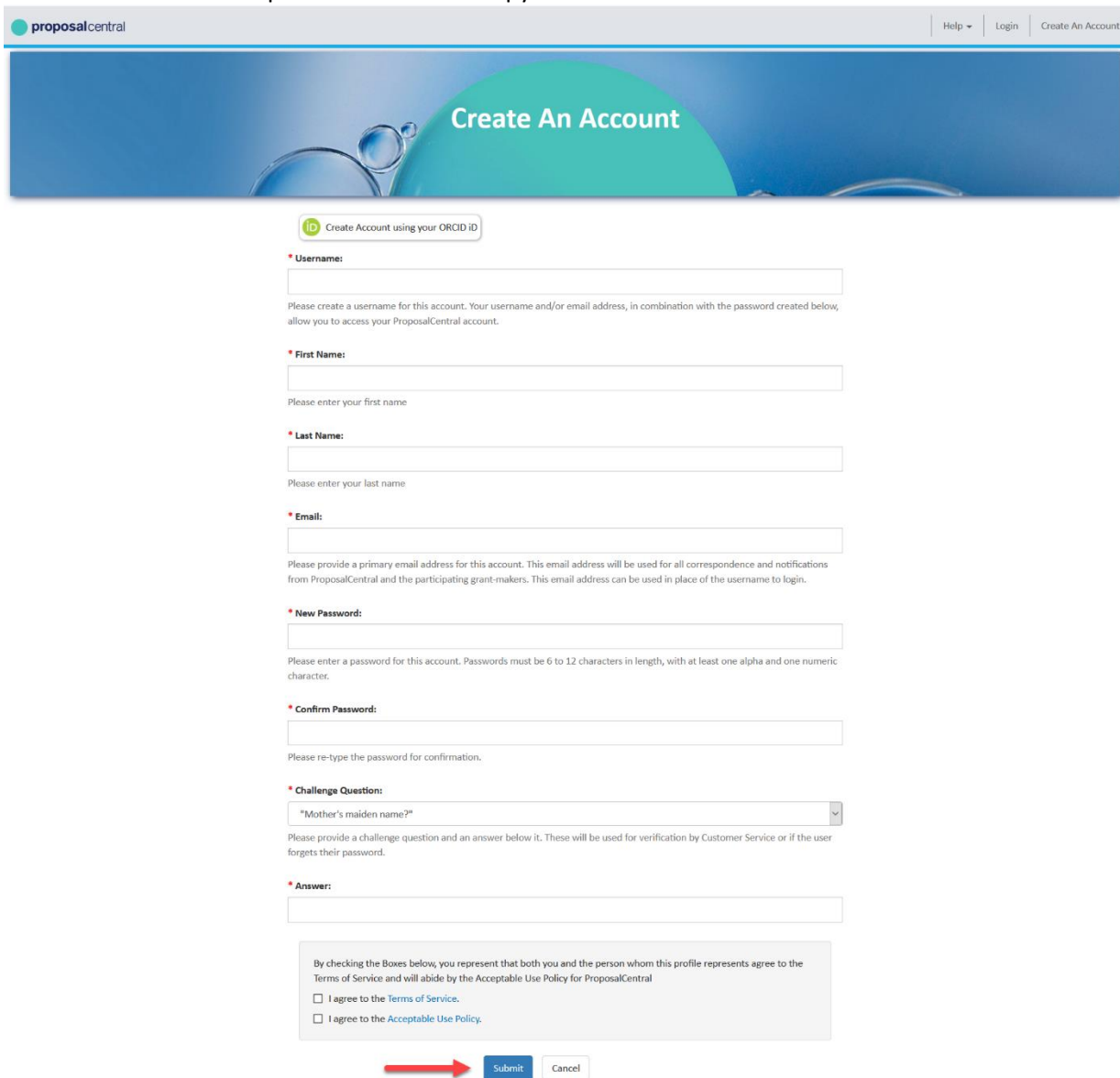
ANNOUNCEMENTS

Altum issues racial discrimination and inequality statement, read more about it [here](#).

[Looking for more research funding opportunities?](#)

[Learn More...](#)

2. Provide the information requested to create an account and click the **Save** button. An e-mail is sent with a confirmation number. Open the e-mail and copy the confirmation number.



proposalcentral Help Login Create An Account

Create An Account

Create Account using your ORCID ID

*** Username:**
Please create a username for this account. Your username and/or email address, in combination with the password created below, allow you to access your ProposalCentral account.

*** First Name:**
Please enter your first name

*** Last Name:**
Please enter your last name

*** Email:**
Please provide a primary email address for this account. This email address will be used for all correspondence and notifications from ProposalCentral and the participating grant-makers. This email address can be used in place of the username to login.

*** New Password:**
Please enter a password for this account. Passwords must be 6 to 12 characters in length, with at least one alpha and one numeric character.

*** Confirm Password:**
Please re-type the password for confirmation.

*** Challenge Question:**
"Mother's maiden name?"
Please provide a challenge question and an answer below it. These will be used for verification by Customer Service or if the user forgets their password.

*** Answer:**

By checking the Boxes below, you represent that both you and the person whom this profile represents agree to the Terms of Service and will abide by the Acceptable Use Policy for ProposalCentral

I agree to the [Terms of Service](#).

I agree to the [Acceptable Use Policy](#).

Submit Cancel

- 3.
4. Return to <https://proposalcentral.com/> and login under the "Application Login" section by providing the username and password created in Step 2.
5. When prompted, paste the confirmation number and click the **Submit Confirmation Number** button.

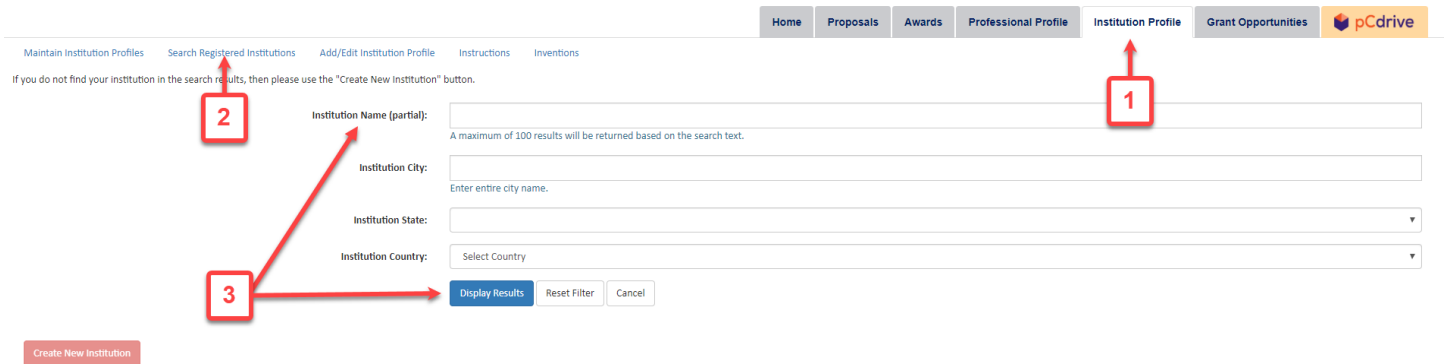


Confirmation Number:

Create An Institution Profile

Before creating a new institution profile, users must search ProposalCentral to make sure the institution does not already exist in the system. To do this:

1. After logging in, click the Institution Profile tab.
2. Click the **Search Registered Institutions** link.
3. Enter a partial name search for your organization and click the **Display Results** button.



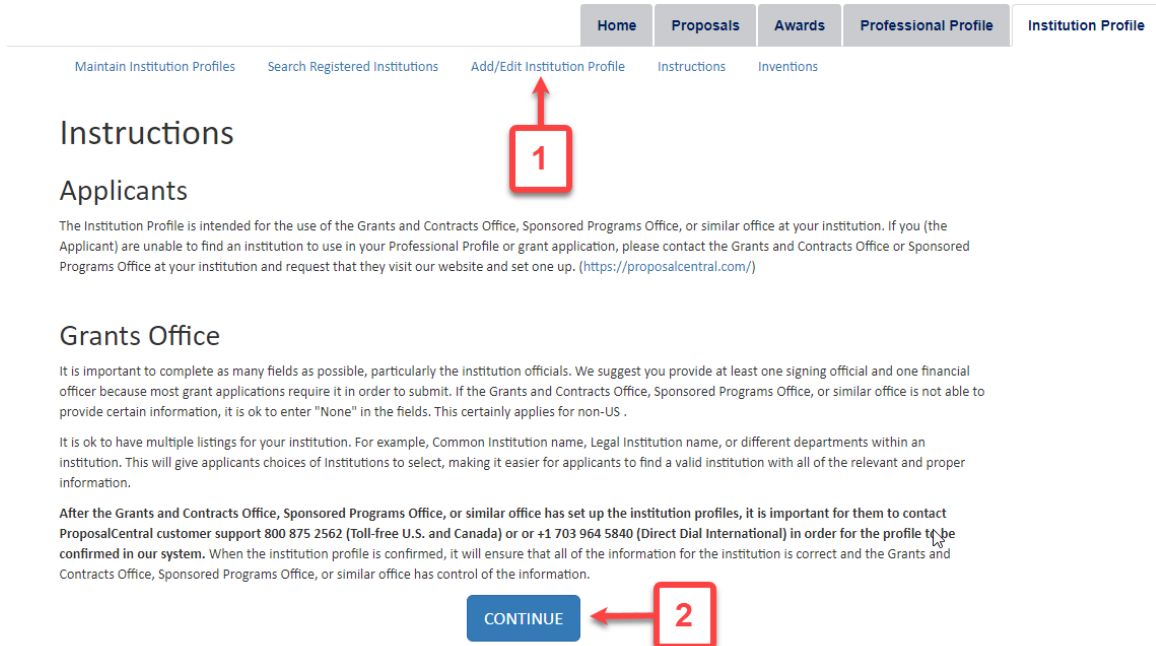
The screenshot shows the 'Search Registered Institutions' page. At the top, there are navigation tabs: Home, Proposals, Awards, Professional Profile, Institution Profile, Grant Opportunities, and pCdrive. Below the navigation, there are links for 'Maintain Institution Profiles', 'Search Registered Institutions', 'Add/Edit Institution Profile', 'Instructions', and 'Inventions'. A message states: 'If you do not find your institution in the search results, then please use the "Create New Institution" button.' The search form includes: 'Institution Name (partial):' with a text input field and a note 'A maximum of 100 results will be returned based on the search text.'; 'Institution City:' with a text input field and a note 'Enter entire city name.'; 'Institution State:' with a dropdown menu; and 'Institution Country:' with a 'Select Country' dropdown menu. At the bottom of the form are buttons for 'Display Results', 'Reset Filter', and 'Cancel'. A red box with the number '1' points to the 'Institution Profile' tab. A red box with the number '2' points to the 'Search Registered Institutions' link. A red box with the number '3' points to the 'Display Results' button. A 'Create New Institution' button is located at the bottom left of the page.



TIP: Make sure to include a key word from your organization's name, but not the complete name. For example, if your organization is called "The University of America in DC", search for "University of America" or even more generally "America".

If your institution is not listed, you can proceed with creating a new profile by following the steps below.

1. Click the **Create New Institution** button.
2. Read the instructions found on the page. If you are the appropriate person to create the new profile, click Continue.



Home | **Proposals** | **Awards** | **Professional Profile** | **Institution Profile**

Maintain Institution Profiles | Search Registered Institutions | **Add/Edit Institution Profile** | Instructions | Inventions

Instructions

Applicants

The Institution Profile is intended for the use of the Grants and Contracts Office, Sponsored Programs Office, or similar office at your institution. If you (the Applicant) are unable to find an institution to use in your Professional Profile or grant application, please contact the Grants and Contracts Office or Sponsored Programs Office at your institution and request that they visit our website and set one up. (<https://proposalcentral.com/>)

Grants Office

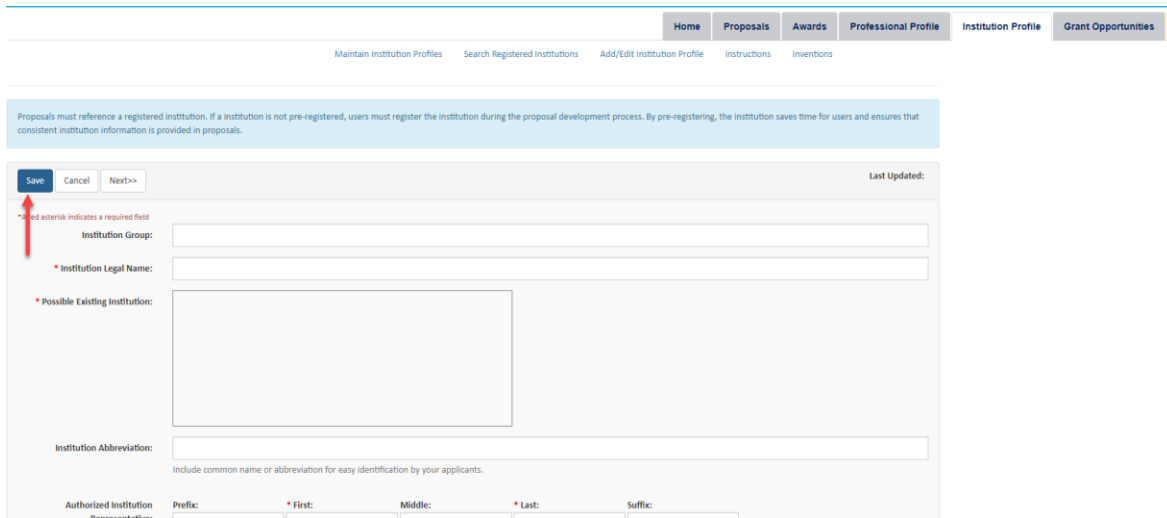
It is important to complete as many fields as possible, particularly the institution officials. We suggest you provide at least one signing official and one financial officer because most grant applications require it in order to submit. If the Grants and Contracts Office, Sponsored Programs Office, or similar office is not able to provide certain information, it is ok to enter "None" in the fields. This certainly applies for non-US .

It is ok to have multiple listings for your institution. For example, Common Institution name, Legal Institution name, or different departments within an institution. This will give applicants choices of institutions to select, making it easier for applicants to find a valid institution with all of the relevant and proper information.

After the Grants and Contracts Office, Sponsored Programs Office, or similar office has set up the institution profiles, it is important for them to contact ProposalCentral customer support 800 875 2562 (Toll-free U.S. and Canada) or +1 703 964 5840 (Direct Dial International) in order for the profile to be confirmed in our system. When the institution profile is confirmed, it will ensure that all of the information for the institution is correct and the Grants and Contracts Office, Sponsored Programs Office, or similar office has control of the information.

CONTINUE

3. Provide the requested information and click the **Save** button.



Proposals must reference a registered institution. If a institution is not pre-registered, users must register the institution during the proposal development process. By pre-registering, the institution saves time for users and ensures that consistent institution information is provided in proposals.

Save | Cancel | Next>> | Last Updated:

* Red asterisk indicates a required field

Institution Group:

* Institution Legal Name:

* Possible Existing Institution:

Institution Abbreviation:

Include common name or abbreviation for easy identification by your applicants.


Authorized Institution: Prefix: * First: Middle: * Last: Suffix:

Add Institution Officials

Now that there is an Institution Profile, add Signing and Financial Officials. Adding institution officials to the Institution Profile makes this information readily available to applicants. If a grant maker requested contact information for institution officials, the applicant can select the appropriate institution official from the list provided in the Institution Profile. See the example below of an applicant supplying information to the grant maker originating from the Institution Profile.

Note: Click Save before completing the sections below.

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

Signing Official OR 

Enter email address

Confirm email address

Financial Officer OR

Enter email address

Confirm email address



TIP: Before adding the institution officials, it is recommended to have those individuals create accounts in ProposalCentral. You can provide them with the instructions found in the first section regarding [creating a new account](#).


To add institution officials to the Institution Profile:

1. If not already logged in, go to <https://proposalcentral.com/> and login under the "Application Login" section.
2. Click the Institution Profile tab.
3. Click the **Edit** button for the institution.

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

Maintain Institution Profiles Search Registered Institutions Add/Edit Institution Profile Instructions Inventions

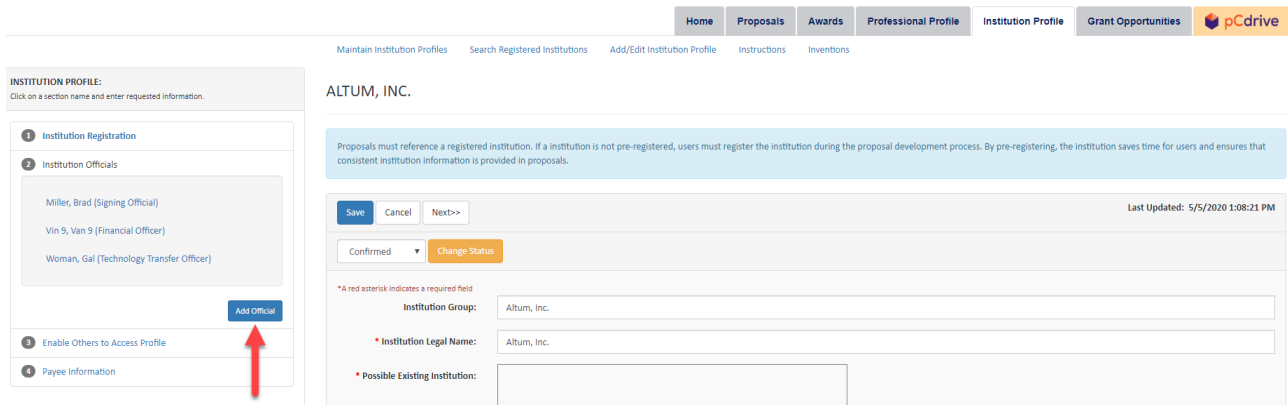
Show 25 entries Search:

Edit/Show	Institution Name	DUNS	EIN
<input type="button" value="Edit"/> 	Altum, Inc.	12-345-6789	

Showing 1 to 1 of 1 entries

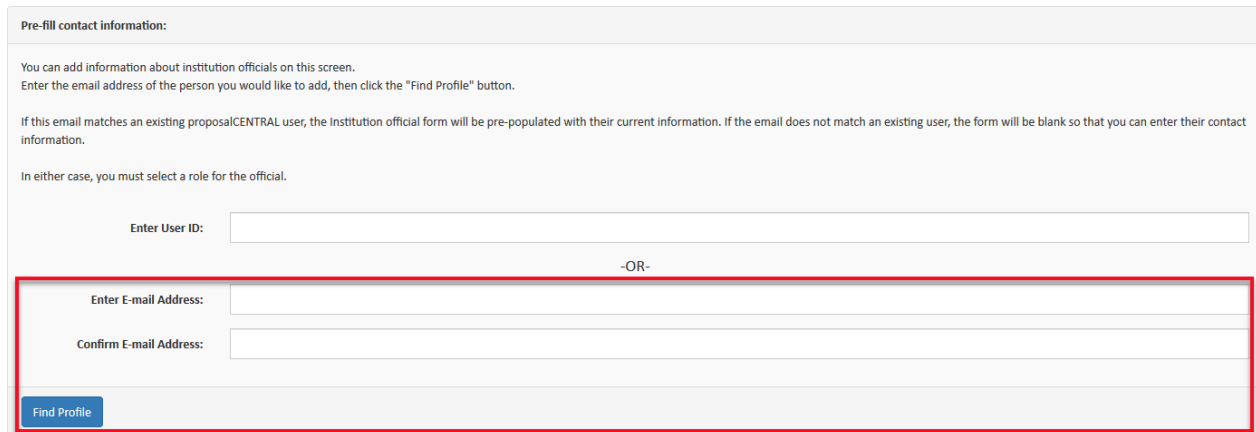
Previous **1** Next

4. In the menu on the left, click the **Add Official** button in the section “2) Institution Officials”.



The screenshot shows the 'ALTUM, INC.' profile page. On the left, there is a navigation menu with sections: 1) Institution Registration, 2) Institution Officials, 3) Enable Others to Access Profile, and 4) Payee Information. The 'Add Official' button is located at the bottom of the 'Institution Officials' section and is highlighted with a red arrow. The main content area shows the institution name 'ALTUM, INC.' and a list of officials: Miller, Brad (Signing Official), Vin 9, Van 9 (Financial Officer), and Woman, Gal (Technology Transfer Officer). There is also a 'Change Status' button and a 'Last Updated' timestamp.

5. Enter the e-mail address of the person twice and click the **Find Profile** button.



The screenshot shows the 'Pre-fill contact information' form. It includes instructions on how to add information about institution officials and a 'Find Profile' button. The form has two input fields for 'Enter E-mail Address' and 'Confirm E-mail Address', which are highlighted with a red box. There is also a 'Find Profile' button at the bottom of the form.

6. If the person has a ProposalCentral account, their information displays. If they have not created an account, you can populate their contact information. In either scenario, select a Role from the drop-down menu. When done entering information, click the **Save** button.

Please identify the administrative officials in your institution that perform the institutional roles listed below.
For grant applications from your institution, the information about these officials will be automatically loaded into grant applications.

Save Cancel <<Previous Next>> Add Official

*** Role:** Select Role
Select an institution role, or enter the Official's role.
Select Role
Signing Official
Financial Officer

Name: Prefix: * First: Middle: * Last: Suffix:
Prefix Test Middle Mongan Suffix

Degrees:

Title: Boss

Division:

7. To add more institution officials, repeat steps 4-6.

Enable Access to Institution Profile

Most likely, there are other individuals at your organization who should have access to the institution profile in order to help maintain it. To grant other users access to the Institution profile, follow these steps:

1. If you're not already logged in, go to <https://proposalcentral.com/> and login under the "Application Login" section.
2. Click the Institution Profile tab.
3. Click the **Edit** button for the institution.

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

Maintain Institution Profiles Search Registered Institutions Add/Edit Institution Profile Instructions

Inventions Search All Institutions

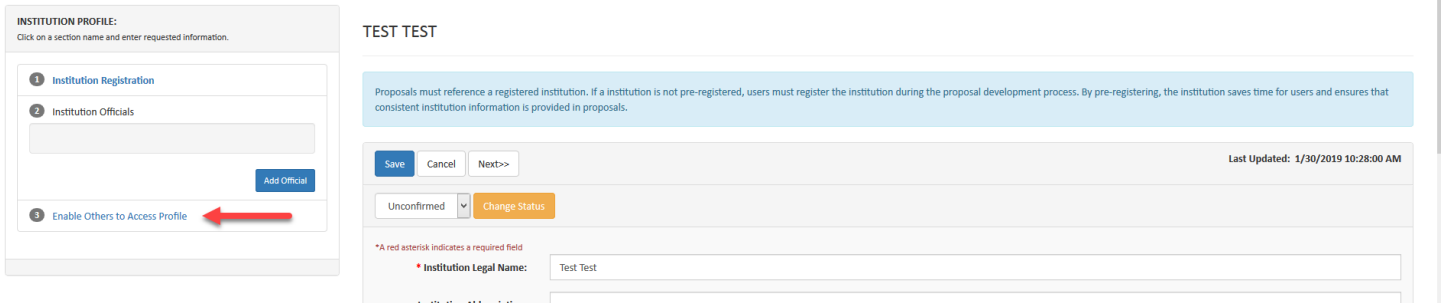
Show 25 entries Search:

Edit/Show	Institution Name	DUNs	EIN
Edit	Liebniz-Institute of Age Research		

Showing 1 to 1 of 1 entries

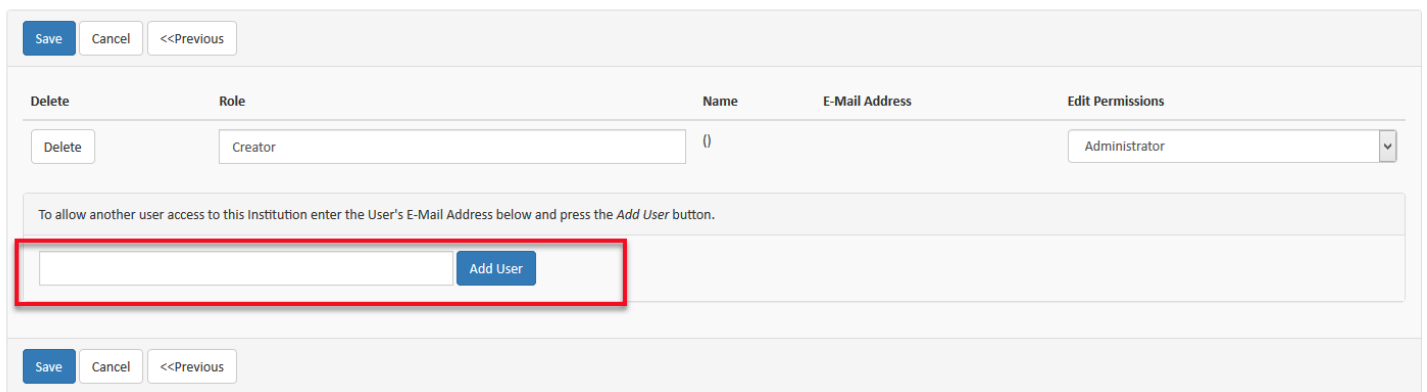
Previous 1 Next

4. In the menu on the left, click the [Enable Others to Access Profile](#) link.

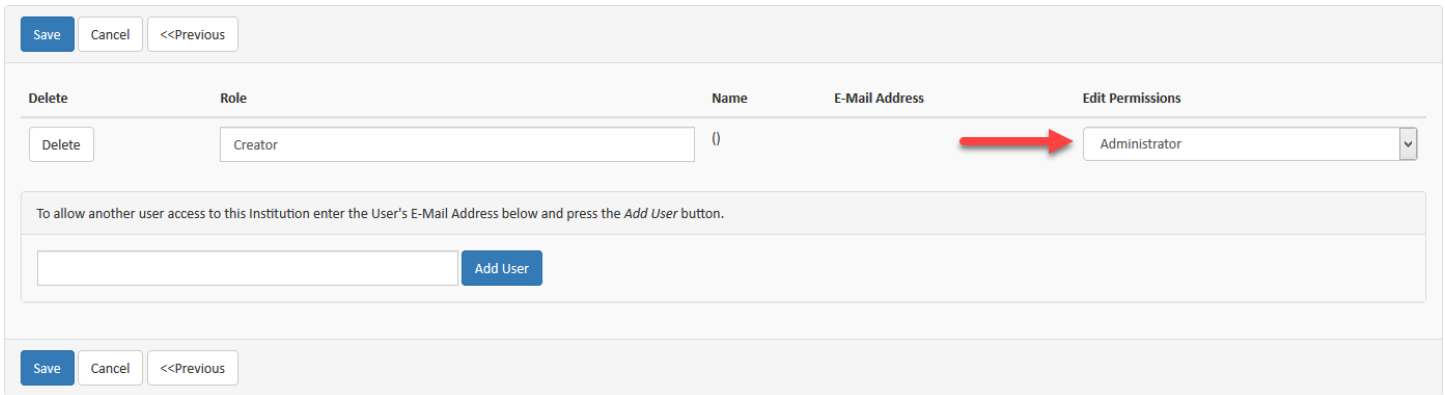


5. Enter the e-mail address of the person and click the **Add User** button. Please note that the person **must** have a ProposalCentral account. If they do not, they can create an account using the instructions found in the first section regarding [creating a new account](#).

INST TEST



6. Enter a role for the person. Many organizations opt to include the person's title. Please note that the person who created the profile is listed as the "Creator". Also, select the desired permission level for the person and click the **Save** button. The permissions are as follows:
- Administrator: The user can make any changes to the Institution Profile, including granting other users access to the Institution Profile (i.e. what you're doing now).
 - Edit: The user can make any changes to the Institution Profile, EXCEPT that they cannot grant other users access to the Institution Profile. Although, they are able to see which users do have access to the Institution Profile and their permission level.
 - View: The user can only see the Institution Profile information; they cannot make any changes.

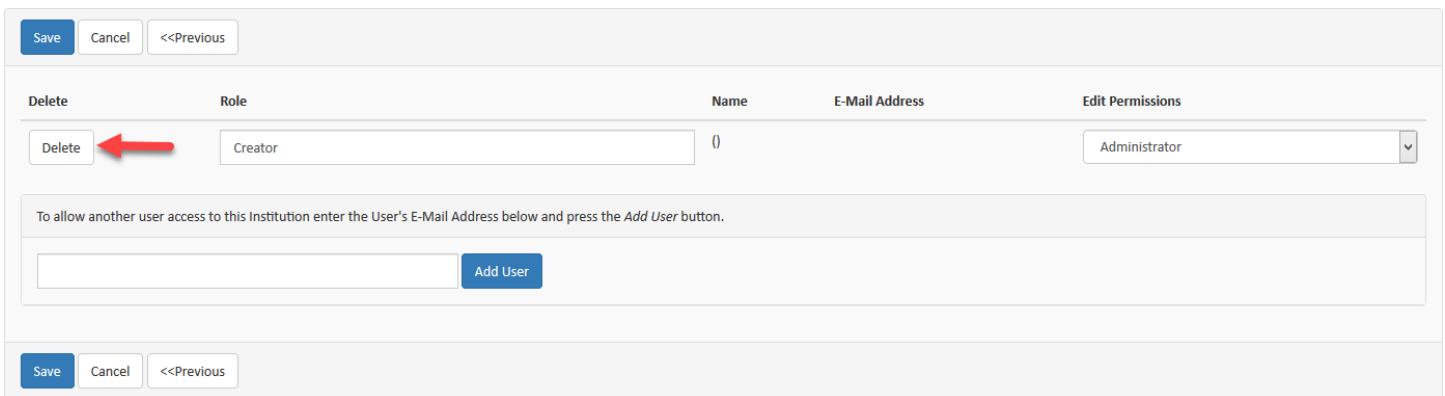


Delete	Role	Name	E-Mail Address	Edit Permissions
<input type="button" value="Delete"/>	<input type="text" value="Creator"/>	()		<input type="text" value="Administrator"/>

To allow another user access to this Institution enter the User's E-Mail Address below and press the *Add User* button.

7. To enable others to access the Institution Profile, repeat steps 5-6.

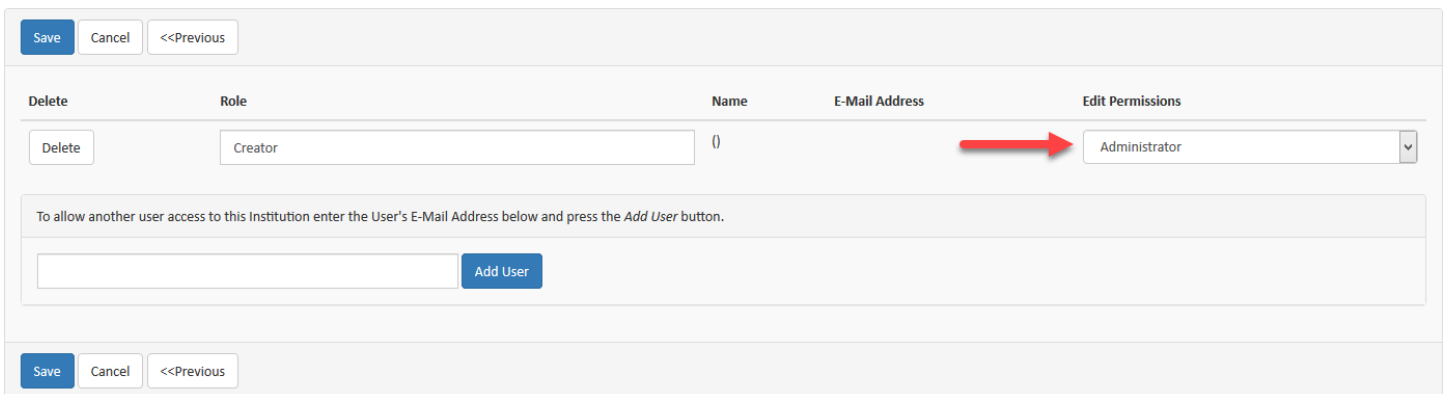
To remove a user's access to the Institution Profile, repeat steps 1-4. At the user access table, click the **Delete** button next to the user to remove.



Delete	Role	Name	E-Mail Address	Edit Permissions
<input type="button" value="Delete"/>	<input type="text" value="Creator"/>	()		<input type="text" value="Administrator"/>

To allow another user access to this Institution enter the User's E-Mail Address below and press the *Add User* button.

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



Delete	Role	Name	E-Mail Address	Edit Permissions
<input type="button" value="Delete"/>	<input type="text" value="Creator"/>	()		<input type="text" value="Administrator"/>

To allow another user access to this Institution enter the User's E-Mail Address below and press the *Add User* button.