

# How to Register as a ProposalCentral User

Your profile allows you to enter personal details that are relevant to your applications. Once you enter your details, the information flows directly into the content of each of your applications. If your details change, you make the change in your profile and the changes are updated automatically.

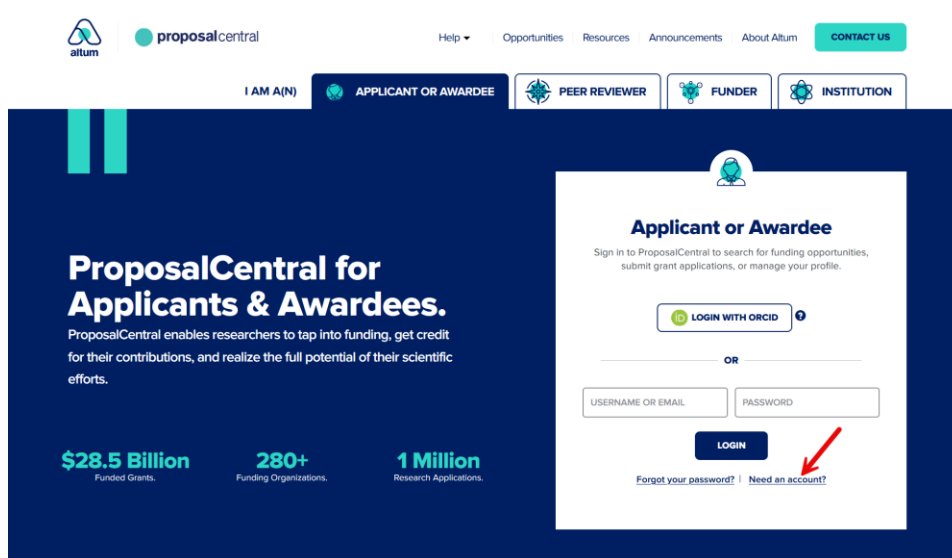
These instructions include the following:

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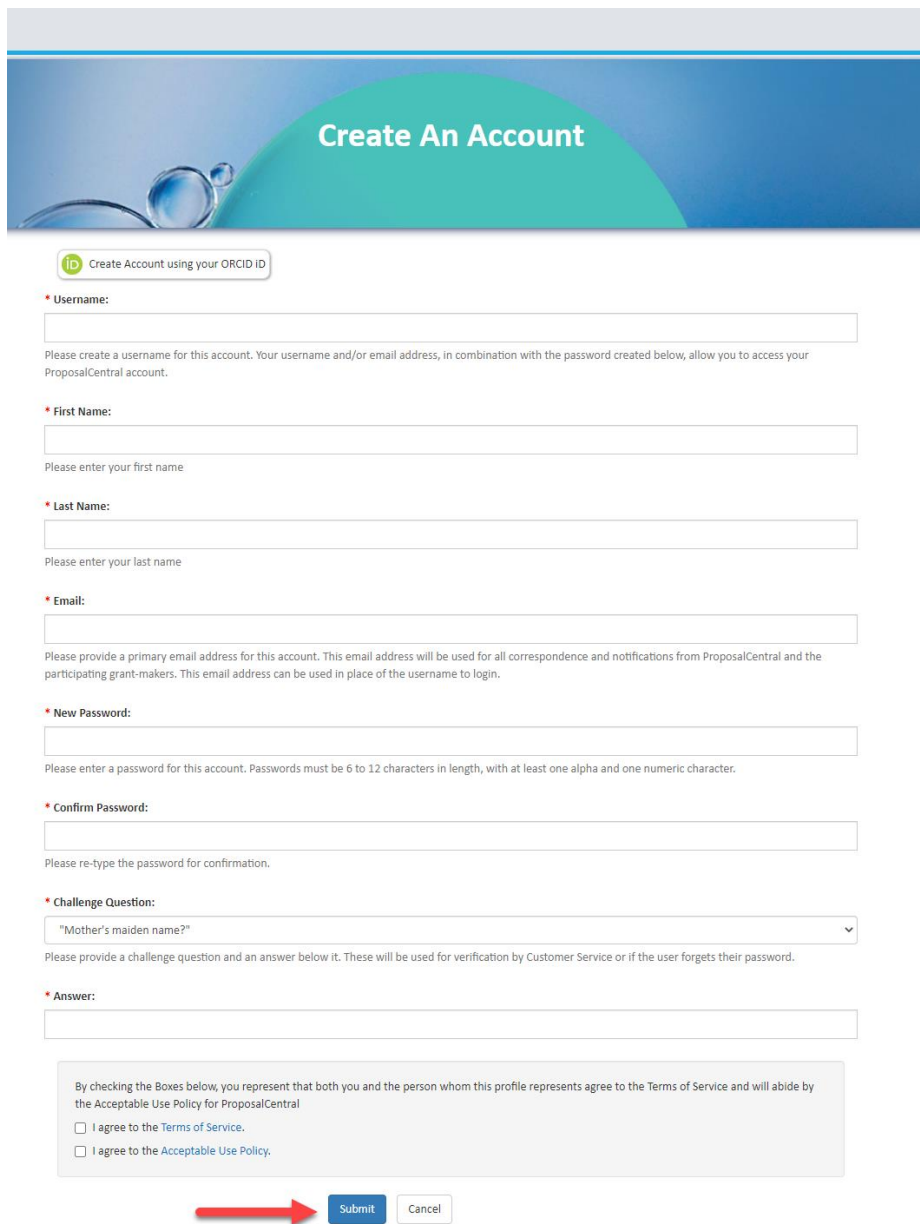
## Create An Account

To create an account:

1. Go to <https://proposalcentral.com> and click the link “Need an account?” button under the Application Login.



2. Provide the information requested to create an account and click the **Submit** button. Please do not use special characters in the Username field.



The form is titled "Create An Account" and features a header image with a blue and green gradient and a water droplet. Below the header, there is a button labeled "Create Account using your ORCID ID". The form contains several required fields, each marked with an asterisk:

- \* Username:** A text input field. Below it, a note states: "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:** A text input field. Below it, a note states: "Please enter your first name"
- \* Last Name:** A text input field. Below it, a note states: "Please enter your last name"
- \* Email:** A text input field. Below it, a note states: "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:** A text input field. Below it, a note states: "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:** A text input field. Below it, a note states: "Please re-type the password for confirmation."
- \* Challenge Question:** A dropdown menu with the selected option "Mother's maiden name?". Below it, a note states: "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:** A text input field.

Below the fields, there is a section for terms and conditions:

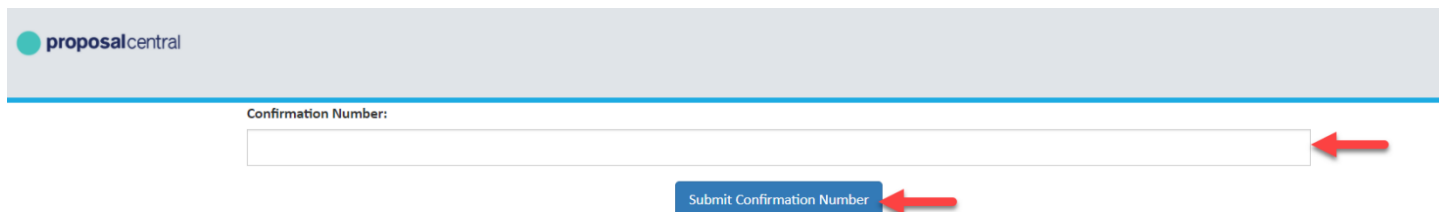
By checking the Boxes below, you represent that both you and the person whom this profile represents agree to the Terms of Service and will abide by the Acceptable Use Policy for ProposalCentral

- ☐ I agree to the [Terms of Service](#).
- ☐ I agree to the [Acceptable Use Policy](#).

At the bottom right, there are two buttons: "Submit" (highlighted with a red arrow) and "Cancel".

3. An e-mail is sent with a confirmation number. Open the e-mail and copy the confirmation number.
4. Return to <https://proposalcentral.com/> and login under the "Applicant or Awardee" section by providing the username and password you created in Step 2.

- When prompted, paste the confirmation number found in your email from step 3 and click the 'Submit Confirmation Number' button.



proposalcentral

Confirmation Number:

Submit Confirmation Number

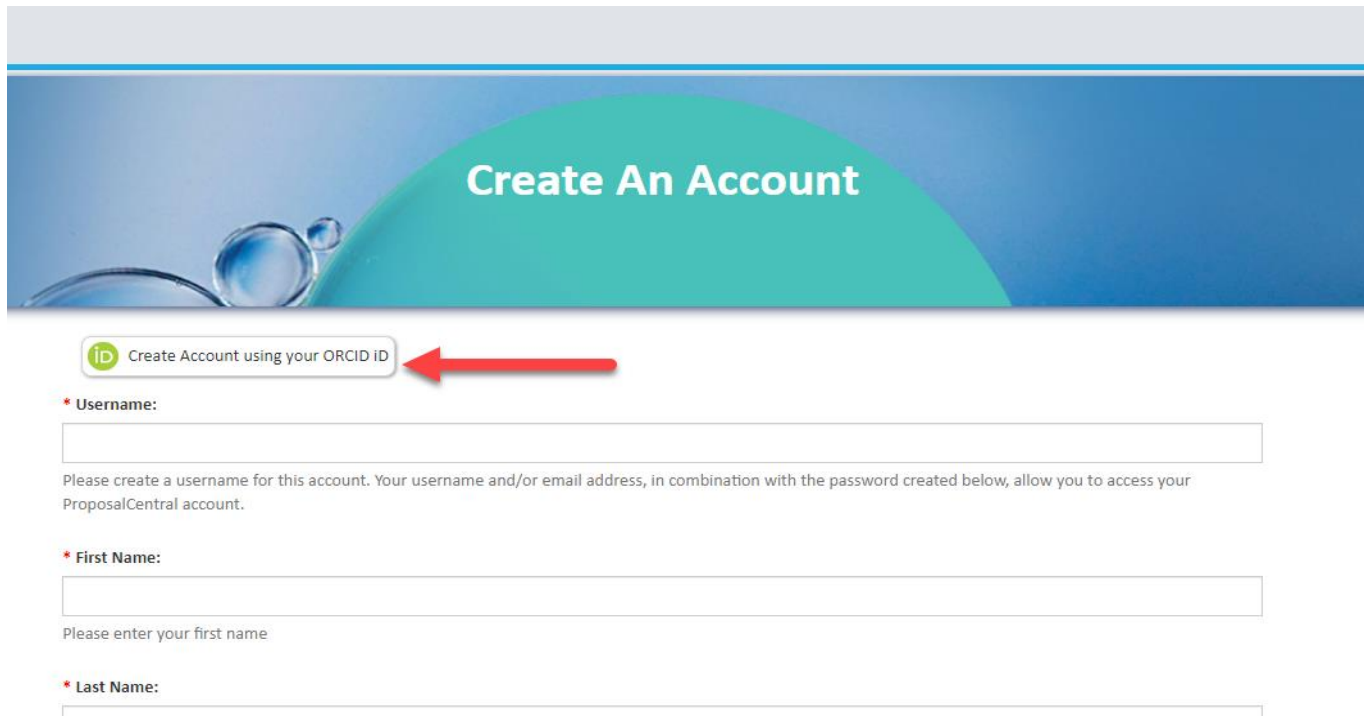
Red arrows point to the input field and the submit button.

## Registering with ORCID


ORCID is a service that allows researchers to easily keep track of their publications, institutional associations, and other support. Once you create your ProposalCentral account you have the option to link it to your ORCID account. Information from your ORCID record can be reused within ProposalCentral streamlining the proposal and reporting process. For more information about ORCID, visit their web site at [orcid.org](http://orcid.org).

## Creating an Account Using ORCID

- Go to <https://proposalcentral.com> and click the link "Need an account? " button under the Application Login.
- Click on the **Create Account using your ORCID iD** button.



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.

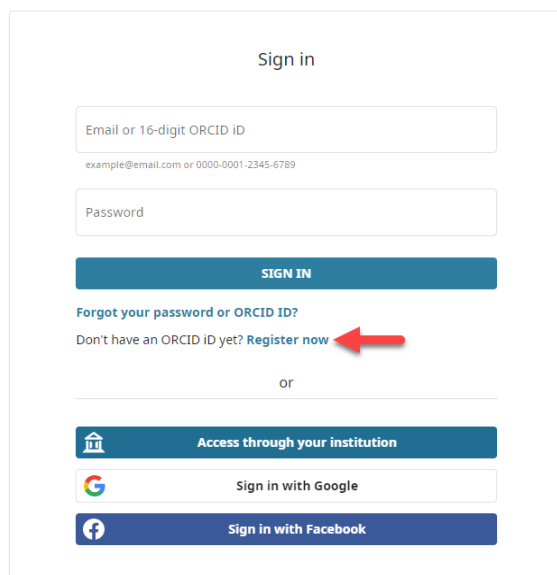
\* First Name:

Please enter your first name

\* Last Name:

Red arrows point to the ORCID iD button and the Username input field.

- The user is directed to the ORCID login and prompted to enter your ORCID username and password and click the **Sign into ORCID** button.



Sign in

Email or 16-digit ORCID ID  
example@email.com or 0000-0001-2345-6789

Password

**SIGN IN**

[Forgot your password or ORCID ID?](#)

Don't have an ORCID ID yet? [Register now](#)

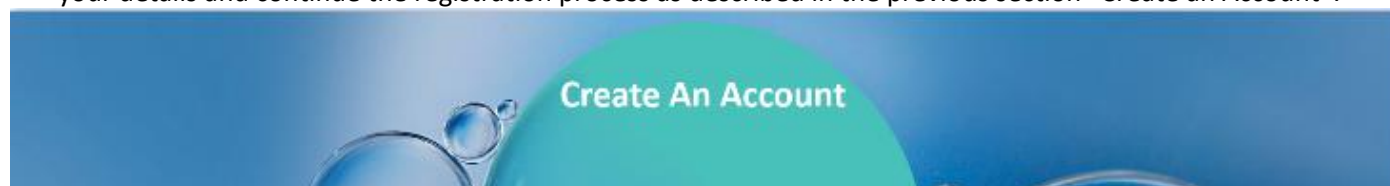
or

**Access through your institution**

**Sign in with Google**

**Sign in with Facebook**

- Once you are successfully signed into ORCID users are re-directed back to the ProposalCentral registration page, where your ORCID iD, First Name, Last Name, and Email are auto-populated from ORCID. Complete the rest of your details and continue the registration process as described in the previous section “Create an Account”.



ORCID ID: 0000-0002-5937-1051

\* 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 personalC2N76763 account.

\* First Name \*

Michael

Please enter your first name

\* Last Name \*

Theresa

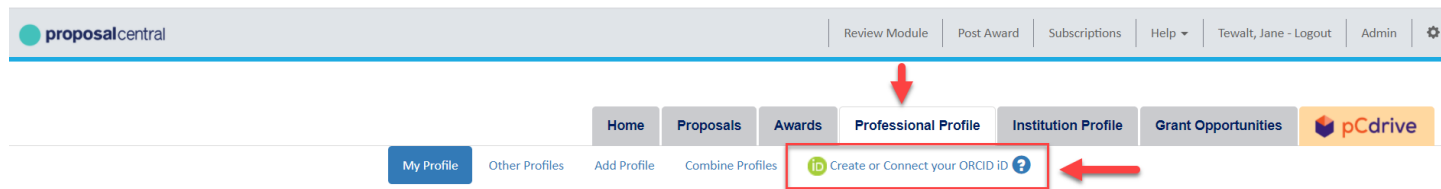
Please enter your last name

\* Email \*

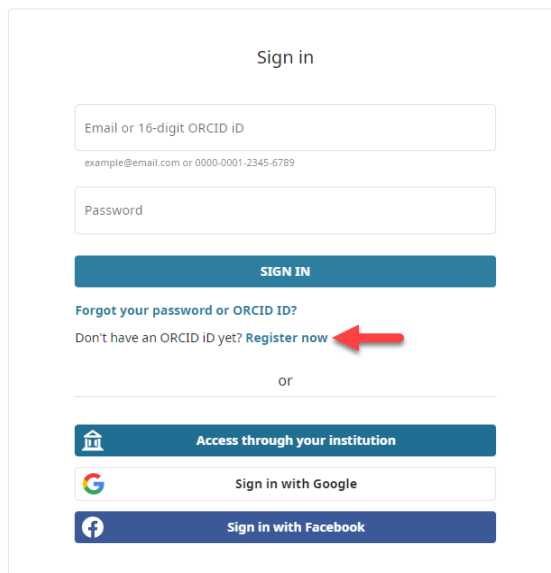
lgood@hawaii.edu

To link an ORCID account:

1. Go to the “Professional Profile” tab and click the link that says “Create or Connect your ORCID iD”



2. Users are directed to the ORCID login screen. If you already have an account, then login with your ORCID iD and password. If you do not have an ORCID account but would like to establish one, then click the “Register Now” link.

A screenshot of the ORCID login screen. It features a 'Sign in' heading, a text input field for 'Email or 16-digit ORCID iD' with a placeholder example, and a 'Password' input field. Below these is a blue 'SIGN IN' button. Underneath the button are two links: 'Forgot your password or ORCID ID?' and 'Don't have an ORCID iD yet? Register now', with a red arrow pointing to the latter. At the bottom, there are three options for signing in: 'Access through your institution' (with a university icon), 'Sign in with Google' (with the Google logo), and 'Sign in with Facebook' (with the Facebook logo).

When you connect your ORCID iD with your ProposalCentral profile, you can easily transfer information from your ORCID record to ProposalCentral and take some of the pain out of online form-filling. Instead of re-keying the same information every time you submit a grant application, ProposalCentral can retrieve relevant data, where available, directly from your ORCID record. All you need to do is verify that it is correct! *The ORCID website can be reached directly by accessing [orcid.org](https://orcid.org).*



**IMPORTANT:** When registering your ORCID account you are asked to select your Visibility Settings. In order to link the information from your ORCID to your ProposalCentral account you must select the ‘Everyone’ option. If your ORCID account is marked as private, then the information will not be visible in ProposalCentral. See screenshot below. More information is also available directly from ORCID at [orcid.org](https://orcid.org).

## Visibility settings

Your ORCID ID connects with your ORCID record that can contain links to your research activities, affiliations, awards, other versions of your name, and more. You control this content and who can see it.

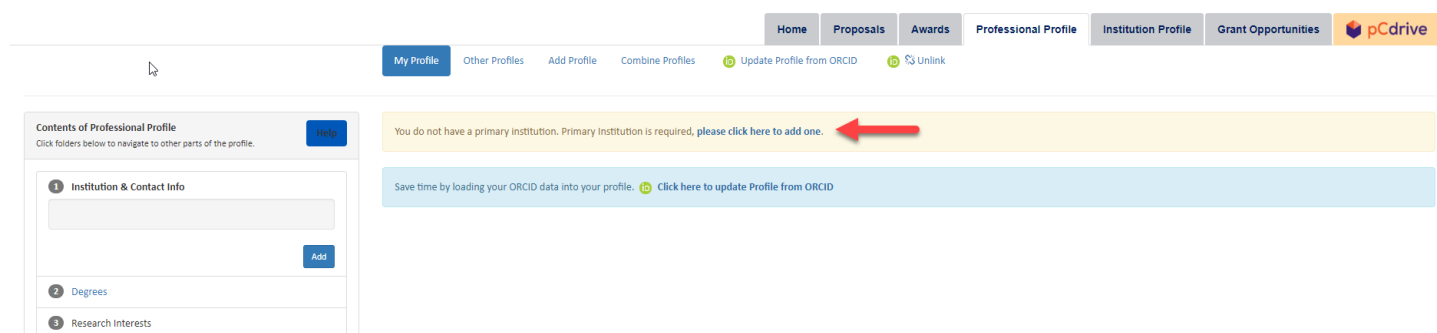
By default, who should be able to see information added to your ORCID Record?

- ☒  **Everyone** (87% of users choose this)
- ☐  **Trusted parties** (5% of users choose this)
- ☐  **Only me** (8% of users choose this)

## Affiliating with an Institution Profile

To add an Institution Profile to your Professional Profile:

1. Click the link showing in the “Institution & Contact Info” section of the Professional Profile. This is the screen that you are directed to after logging in and clicking on the Professional Profile tab.




The screenshot shows the 'Professional Profile' page with a navigation bar at the top. The 'Institution Profile' tab is selected. On the left, the 'Contents of Professional Profile' sidebar lists 'Institution & Contact Info', 'Degrees', and 'Research Interests'. The 'Institution & Contact Info' section is expanded, showing a search bar and an 'Add' button. A red arrow points to the 'Add' button. A yellow banner at the top of the main content area states: 'You do not have a primary institution. Primary institution is required, please click here to add one.' Below this, a blue banner says: 'Save time by loading your ORCID data into your profile. Click here to update Profile from ORCID'.

2. Enter a partial name search for your organization and click the **Display Results** button.



**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 you do not find your institution in the search results, then please use the "Create New Institution" button.

 **Institution Name (partial):**


A maximum of 100 results will be returned based on the search text.

**Institution City:**

Enter entire city name.


**Institution State:**

**Institution Country:**

 [Display Results](#) [Reset Filter](#) [Cancel](#)

3. If:

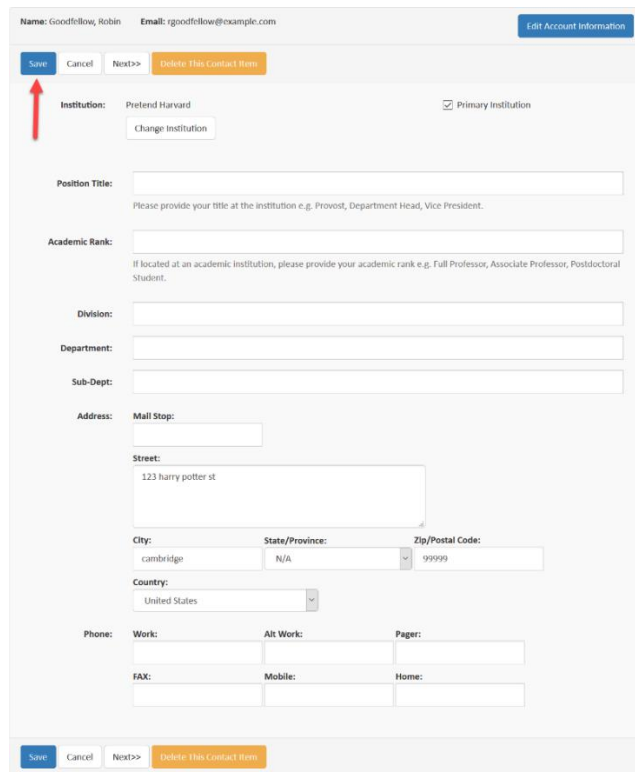
**Your institution is listed**, select it by clicking the radio button in the left column and click the **Select** button at the bottom.

Select	Institution Name	Institution Status
 <input type="radio"/>	Pretend Harvard	Confirmed

 [Select](#) [Cancel](#)

**Your institution is NOT listed**, please contact Altum Customer Service.

4. The address from the Institution Profile populates your Professional Profile, but users can update any of the information that displays (e.g. change street address). Additionally, it is recommended that users populate the other fields (e.g. Position Title, Phone). Most grant makers request this information in the applications and the information from your profile flows into applications, so you do not have to re-enter later. Make sure to click the **Save** button to retain changes.



Name: Goodfellow, Robin Email: rgoodfellow@example.com [Edit Account Information](#)

[Save](#) [Cancel](#) [Next>>](#) [Delete This Contact Item](#)

**Institution:** Pretend Harvard ☒ Primary Institution  
[Change Institution](#)

**Position Title:**   
Please provide your title at the institution e.g. Provost, Department Head, Vice President.

**Academic Rank:**   
If located at an academic institution, please provide your academic rank e.g. Full Professor, Associate Professor, Postdoctoral Student.

**Division:**

**Department:**

**Sub-Dept:**

**Address:** **Mall Stop:**

**Street:**   
123 harry potter st

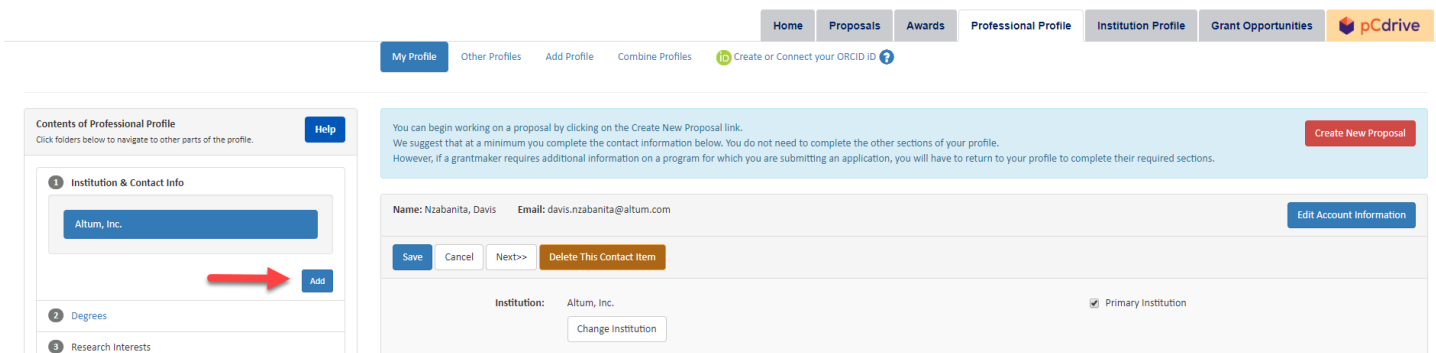
**City:**  **State/Province:**  **Zip/Postal Code:**   
cambridge N/A 99999

**Country:**   
United States

**Phone:** **Work:**  **Alt Work:**  **Pager:**   
**FAX:**  **Mobile:**  **Home:**

[Save](#) [Cancel](#) [Next>>](#) [Delete This Contact Item](#)

- If affiliated with multiple institutions (e.g. a hospital and academic institution), users can add another Institution Profile to the Professional Profile by clicking the **Add** button in the “Institution & Contact Info” section in the left menu.



Home Proposals Awards Professional Profile Institution Profile Grant Opportunities pCdrive

[My Profile](#) [Other Profiles](#) [Add Profile](#) [Combine Profiles](#) [Create or Connect your ORCID ID](#) [?](#)

**Contents of Professional Profile** [Help](#)  
Click folders below to navigate to other parts of the profile.

**1 Institution & Contact Info**  
Altum, Inc. [Add](#)

**2 Degrees**

**3 Research Interests**

You can begin working on a proposal by clicking on the Create New Proposal link.  
We suggest that at a minimum you complete the contact information below. You do not need to complete the other sections of your profile.  
However, if a grantmaker requires additional information on a program for which you are submitting an application, you will have to return to your profile to complete their required sections.

[Create New Proposal](#)

Name: Nzabanita, Davis Email: davis.nzabanita@altum.com [Edit Account Information](#)

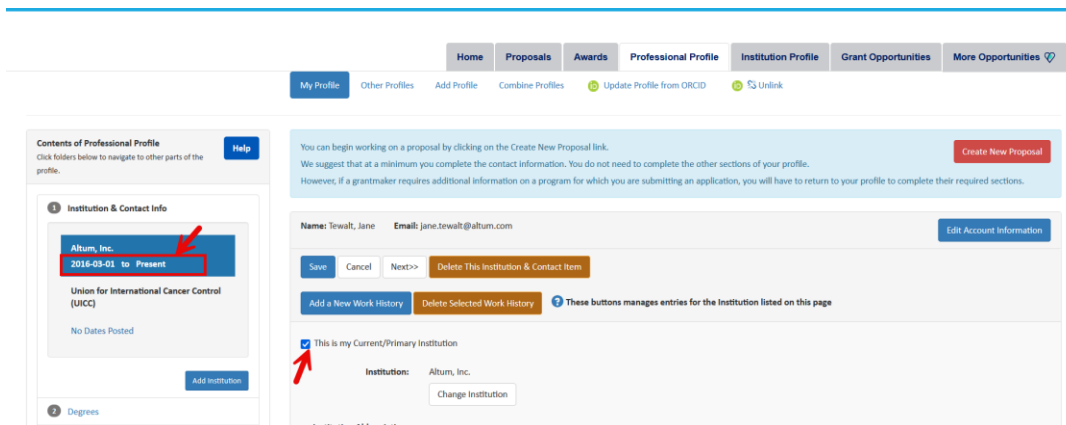
[Save](#) [Cancel](#) [Next>>](#) [Delete This Contact Item](#)

**Institution:** Altum, Inc. ☒ Primary Institution  
[Change Institution](#)

- Repeat steps 2-4 to search for and select the appropriate Institution Profile.
- The first Institution Profile added is considered the “Primary Institution”. The “Primary Institution” is what displays by default as the Lead Institution when starting an application. However, users can change the Lead Institution in applications to another institution as necessary.



Additionally, users can change which Institution Profile is listed as the “Current/Primary Institution” at any time. To do this, click the checkbox for “This is my Current/Primary Institution” that displays below the institution name on the edit contact information screen for the Institution Profile. Click **Save** to retain the change.



## Populating Your Professional Profile

The ProposalCentral Professional Profile allows users to store personal information that may be requested in applications, including:

1. Degrees
2. Personal data (aka demographic data)
3. Other Support
4. Publications
5. Inventions

If users do not complete this information in the Professional Profile and the grant maker is requesting it, users must return to the Professional Profile later to complete it.

To work on a section, click the name of the section in the menu on the left. Make sure to always click the **Save** button to retain changes.

**Contents of Professional Profile**  
Click folders below to navigate to other parts of the profile.

- 1 Contact Information
- 2 **Degrees**
- 3 Research Interests
- 4 Personal Data for Applications
- 5 Biosketch
- 6 Other Support
- 7 Publications
- 8 Inventions
- 9 Enable other users to access your profile
- 10 Account Information

Name: Nzabanita, Davis    Email: davis.nzabanita@altum.com    [Edit Account Information](#)

[Save](#) [Cancel](#) [<<Previous](#) [Next>>](#)

Please note that Grant makers could request the degree information as a comma separated list or require more details. If the application you are completing is asking for a comma separated list, please use the **Highest Degree(s)** and **Other Degree(s)** fields. Otherwise, use the **Baccalaureate Degree(s)** and **Post-Baccalaureate Degree(s)** sections to enter the Degree information.

**Highest Degree(s):**   
List highest degree(s) separated by commas. Use Standard abbreviations e.g., Ph.D., M.D., D.V.M., M.P.H.

**Other Degree(s):**   
List other degree(s) separated by commas. Use Standard abbreviations e.g., B.S., B.A., M.S.

**Baccalaureate Degree(s):** [Add New Degree](#)

Degree	Other	Institution	Year Of Degree

**Post Baccalaureate Degree(s):** [Add New Degree](#)

Degree	Other	Institution	Year Of Degree

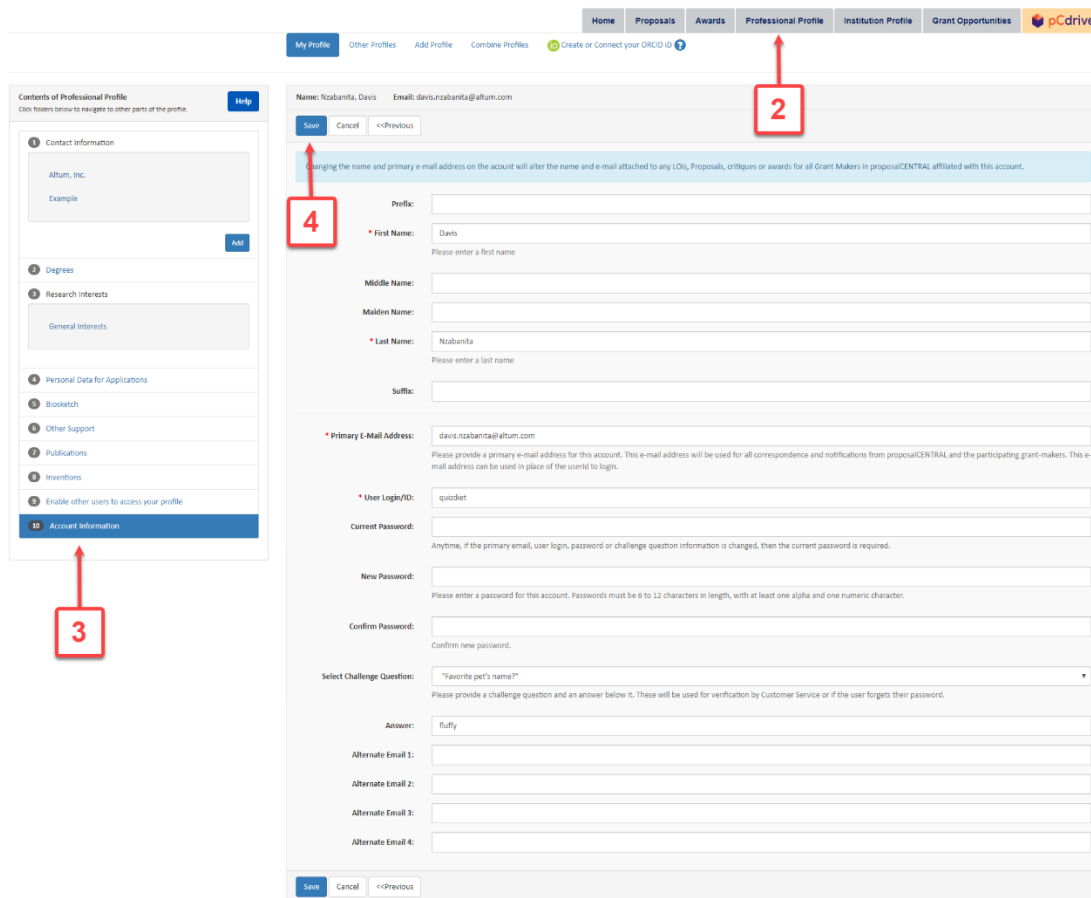
[Save](#) [Cancel](#) [<<Previous](#) [Next>>](#)

The individual sections include instructions on what information is entered, how to update it and maintain it current for use in applications and grant deliverable tasks.

## Changing Passwords or Account Information

To update the basic information supplied when the account was created (i.e. name, e-mail, username, password, challenge question), follow these steps:

1. If not already logged in, go to <https://proposalcentral.com/> and login under the “Application Login” section.
2. Click the Professional Profile tab.
3. Click the Account Information link in the menu on the left.
4. Update the necessary information and click the **Save** button. To make the following changes, enter your existing password in the “Current Password” field as well:
  - a. Primary E-Mail Address
  - b. User Login/ID
  - c. New Password
  - d. Challenge Question

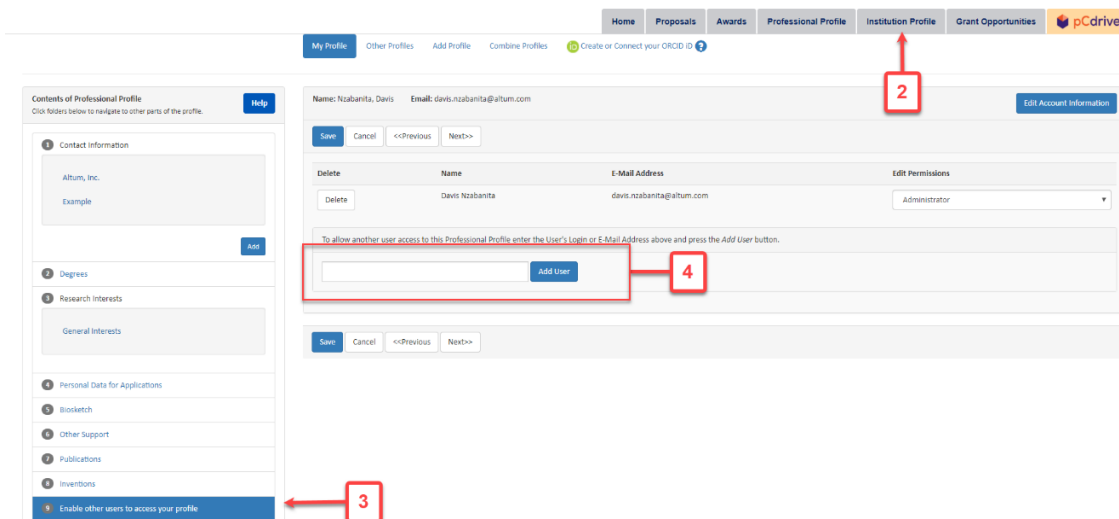


The screenshot shows the 'Professional Profile' page in ProposalCentral. At the top, a navigation bar includes 'Home', 'Proposals', 'Awards', 'Professional Profile' (highlighted), 'Institution Profile', 'Grant Opportunities', and 'pCdrive'. Below this, a sub-navigation bar has 'My Profile', 'Other Profiles', 'Add Profile', and 'Combine Profiles'. A red arrow labeled '2' points to the 'Professional Profile' tab. On the left, a sidebar titled 'Contents of Professional Profile' lists various sections: Contact Information, Degrees, Research Interests, Personal Data for Applications, Sketch, Other Support, Publications, Inventions, Enable other users to access your profile, and Account Information. A red arrow labeled '3' points to the 'Account Information' section. The main content area shows the profile details for 'Name: Nzabanta, Davis' and 'Email: davis.nzabanta@altum.com'. A red arrow labeled '4' points to the 'Save' button at the top of the form. The form includes fields for Profile, First Name, Middle Name, Maiden Name, Last Name, Suffix, Primary E-Mail Address, User Login/ID, Current Password, New Password, Confirm Password, Select Challenge Question, Answer, and Alternate Email 1 through 4. A warning message states: 'Changing the name and primary e-mail address on the account will alter the name and e-mail attached to any LOIs, Proposals, critiques or awards for all Grant Makers in proposalCENTRAL affiliated with this account.'

## Enabling Others to Access Your Profile

Most likely there are other individuals at your organization who you may want to allow access to your profile in order to help maintain it (e.g. administrative assistant). To grant other users access to your profile, follow these steps:

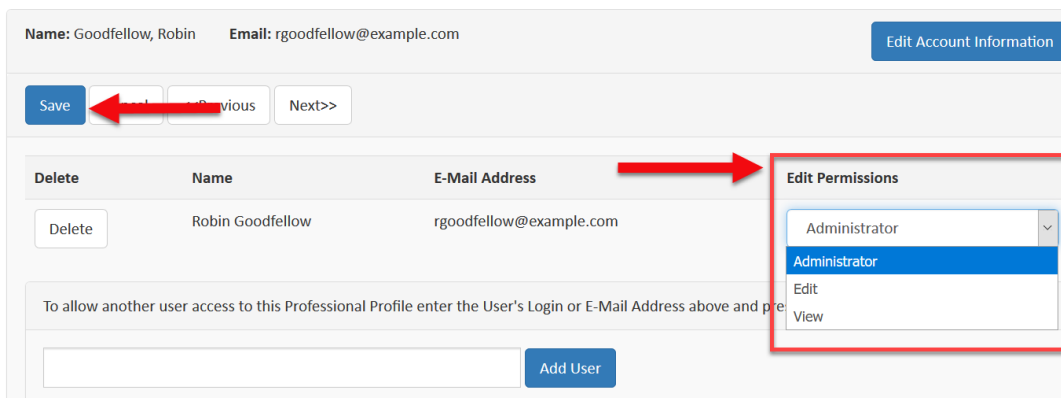
1. If not already logged in, go to <https://proposalcentral.com/> and login under the "Application Login" section.
2. Click the Professional Profile tab.
3. Click the Enable other users to access your profile link in the menu on the left.
4. Enter the e-mail address of the person and click the Add User button. Please note that the person **must** already have a ProposalCentral account. If not, they can create an account using the instructions found in the first section regarding creating a new account.



The screenshot shows the 'Professional Profile' page. Callout 2 points to the 'Institution Profile' tab in the top navigation bar. Callout 3 points to the 'Enable other users to access your profile' button in the left sidebar. Callout 4 points to the 'Add User' button in the 'Add User' section.

5. Select the desired permission level for the person and click the 'Save' button. The permissions are as follows:

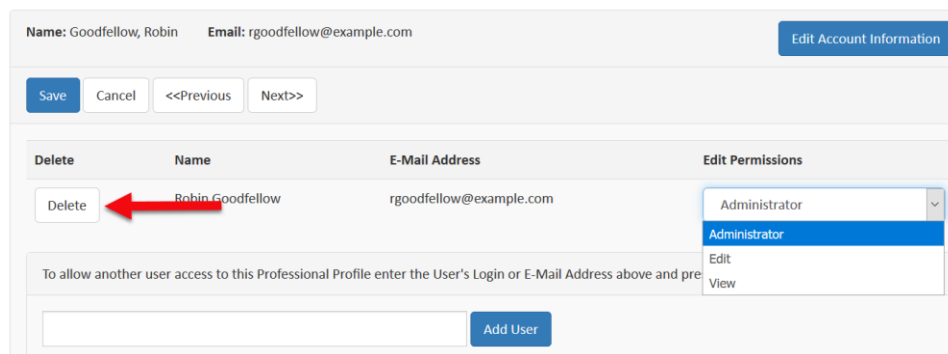
- Administrator: The user can make any changes to your profile, including granting other users access to your profile (i.e. what you're doing now).
- Edit: The user can make any changes to your profile, EXCEPT they cannot grant other users access to your profile (i.e. what you're doing now) or see who has access to your profile.
- View: The user can only see your profile information; they cannot make any changes. They cannot see the other users who have access to your profile.



The screenshot shows the 'Professional Profile' page for Robin Goodfellow. A red arrow points to the 'Save' button. Another red arrow points to the 'Edit Permissions' dropdown menu, which is open and shows the 'Administrator' option selected.

6. To enable others to access your profile, repeat steps 4-5.

If you need to remove a user's access to your profile, repeat steps 1-3 above. When you arrive at the user access table, click the Delete link next to the user to remove.



Delete	Name	E-Mail Address	Edit Permissions
Delete	Robin Goodfellow	rgoodfellow@example.com	Administrator Administrator Edit View

To allow another user access to this Professional Profile enter the User's Login or E-Mail Address above and press