December 2020

How to Create an Application Using ProposalCentral

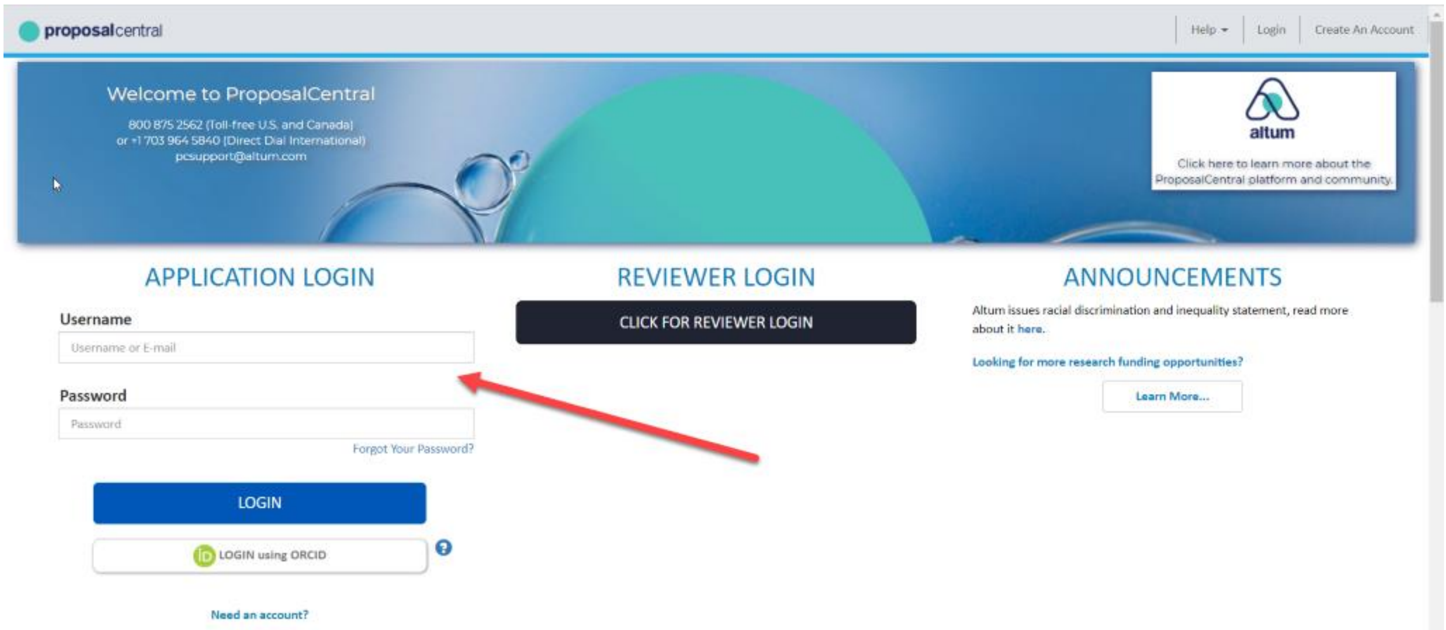
How to Create an Application using ProposalCentral

This tutorial includes the following (click the section to be directed to the instructions):

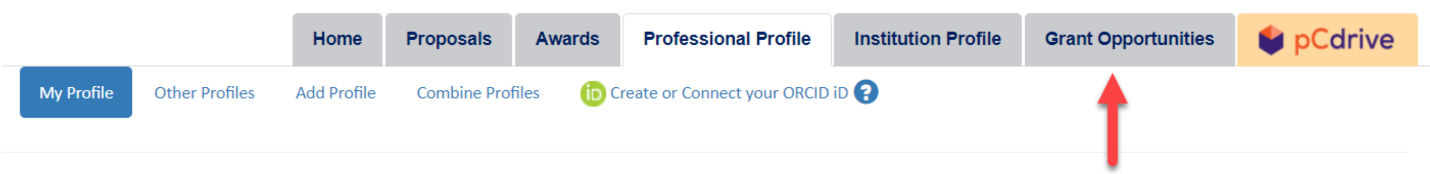
How to Start An Application

To start an application:

1. Go to https://proposalcentral.com/ and login under the “Application Login” section. If you do not have an account yet, please refer to the “How to Register as a ProposalCentral user” tutorial.



2. Click the gray Grant Opportunities tab in the upper right.



3. Select the grant maker you’re looking for from the drop-down menu at the top of the page and click the **Filter List by GrantMaker** button. All the opportunities available for the selected grant maker will show. You can:

    a. Click the link in the Grant Maker column to open the grant maker’s website in a separate browser window or tab.

    b. Click the link and/or download the document in the Program column to see program information supplied by the grant maker.

    c. See the deadlines for the LOI stage, if applicable, and the Proposal stage. **All deadlines are in US Eastern Time.** If a document icon is showing, you can click on it to download it. This includes necessary information about the deadline from the grant maker.

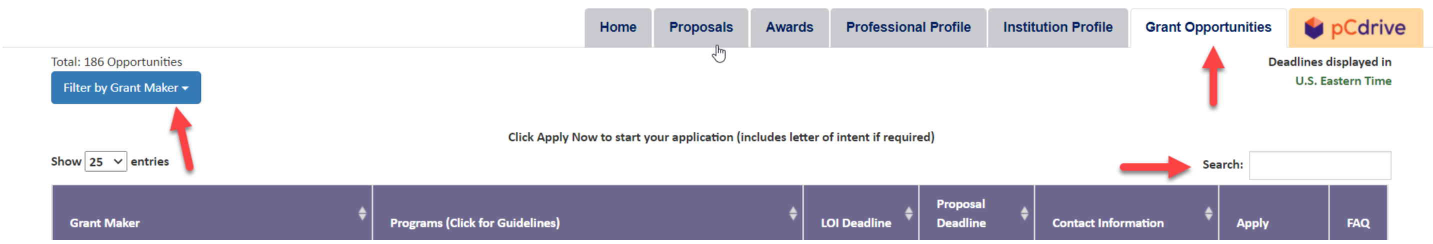
    d. Click the link or download the document in the Contact Information column. Clicking the link opens an e-mail to the program administrator. If a document is provided instead, it includes the grant maker contact information.

e. If a document icon is showing in the FAQ column, you can click on it to download it. This includes information from the grant maker.

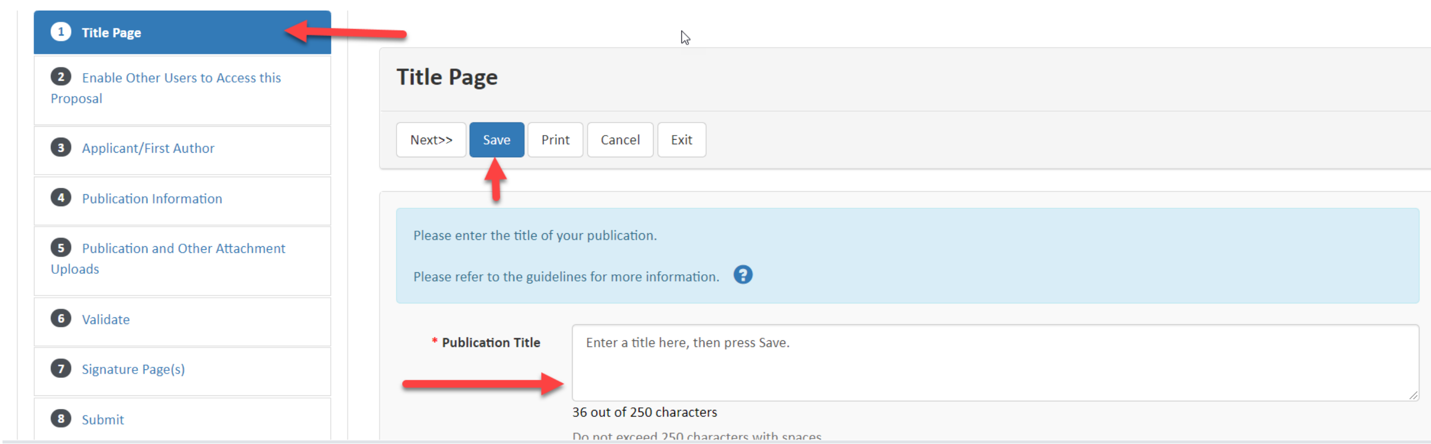
To start an application, click the "Apply Now" link. If there is an LOI stage, this starts the LOI. If there is no LOI stage, this starts a Proposal (aka Full Proposal).

NOTE: If the program requires an LOI and the LOI deadline has passed, you are able to start the LOI but will not be able to submit it. You must contact the grant maker to get an LOI deadline extension. See 3d above for information on how to obtain the contact information for the program.

ProposalCentral Customer Support cannot provide deadline extensions; only the grant maker can.



4. Once the application has opened, enter a project title and click a **Save** button. The grant maker may refer to it as something other than "Project Title" specifically, but it is likely the very first field on the very first page.



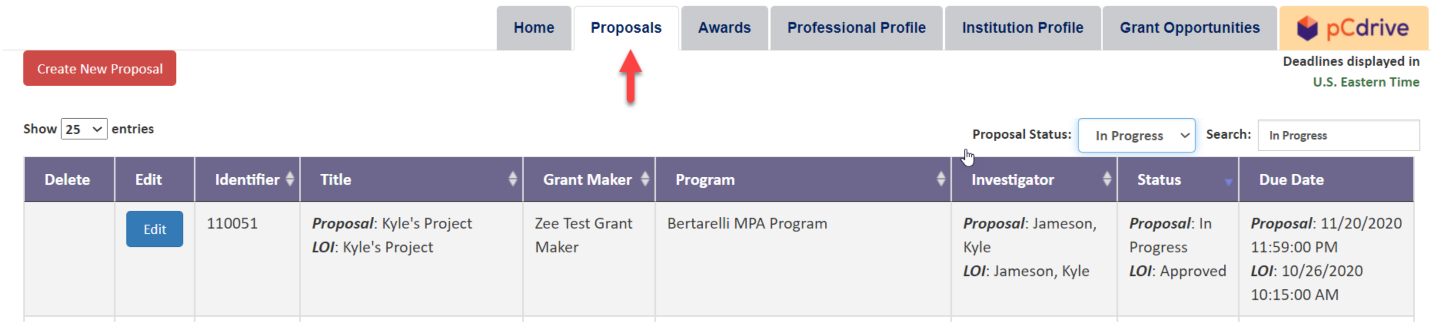
5. You can now navigate to any section within the LOI/Full Proposal to review the information and add data and/or files.

Returning to In Progress Applications

At any point you can exit your application by closing the application window. Make sure to click the **Save** button for the section **before** closing the window.

Return to the application by:

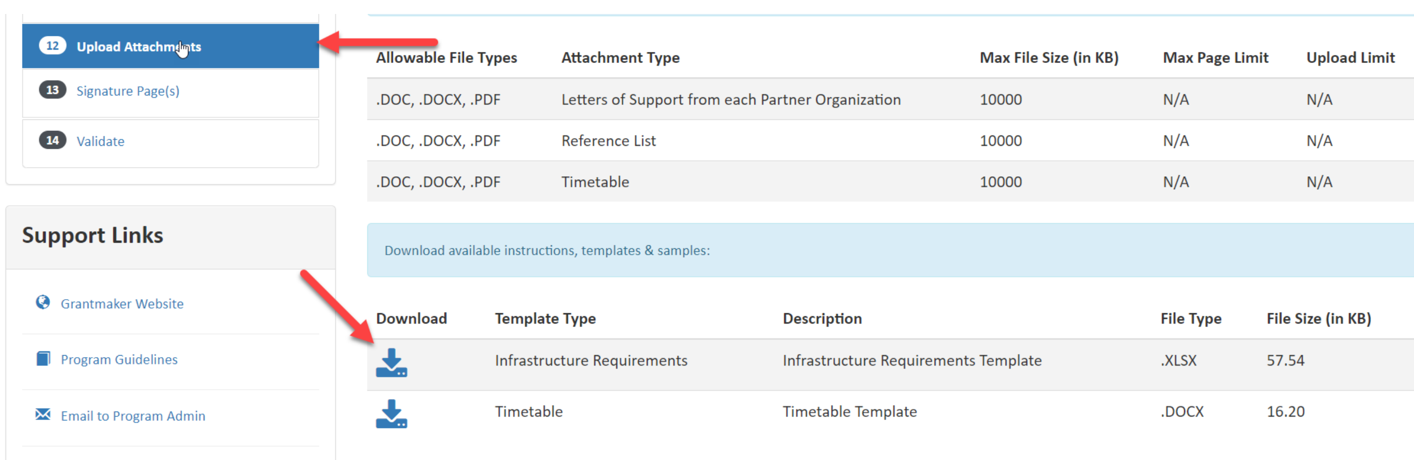
1. Going to https://proposalcentral.com/ ,logging in under the "Application Login" section, and clicking on the Proposals tab.



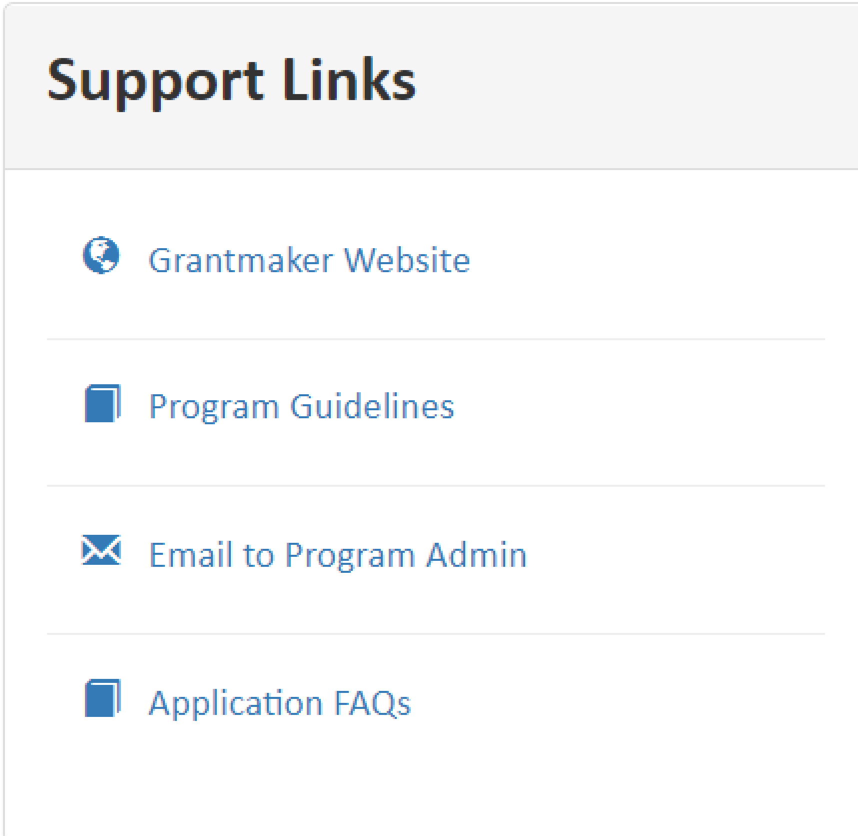
2. Clicking the **Edit** button for the application found in the "In Progress" Proposal Status.

How to Download Templates and Instructions

If the grant maker you are applying to has provided forms and instructions, you can download them in a section called "Download Templates & Instructions". Click the link for this section in the gray menu on the left. To download a document, click the **Download** icon.



Additionally, in the gray menu on the left there is a section titled "Support Links". The information in this section is the same as the information shown on the Grant Opportunities page described earlier.



How to Provide Other Users Access to the Application

Most likely, there are other individuals who you may want to have access to your application in order to help complete it or oversee/approve it. To grant other users access to your application, follow these steps:

1. Click the “Enable Other Users to Access this Proposal” link in the gray menu on the left.

2. At the bottom of the page, enter the e-mail address of the person and click the **Find User** button. Please note that the person **must** already have a ProposalCentral account. If they do not have a PC account, they can create an account using the instructions found in the “How to Register as a ProposalCentral user” tutorial.

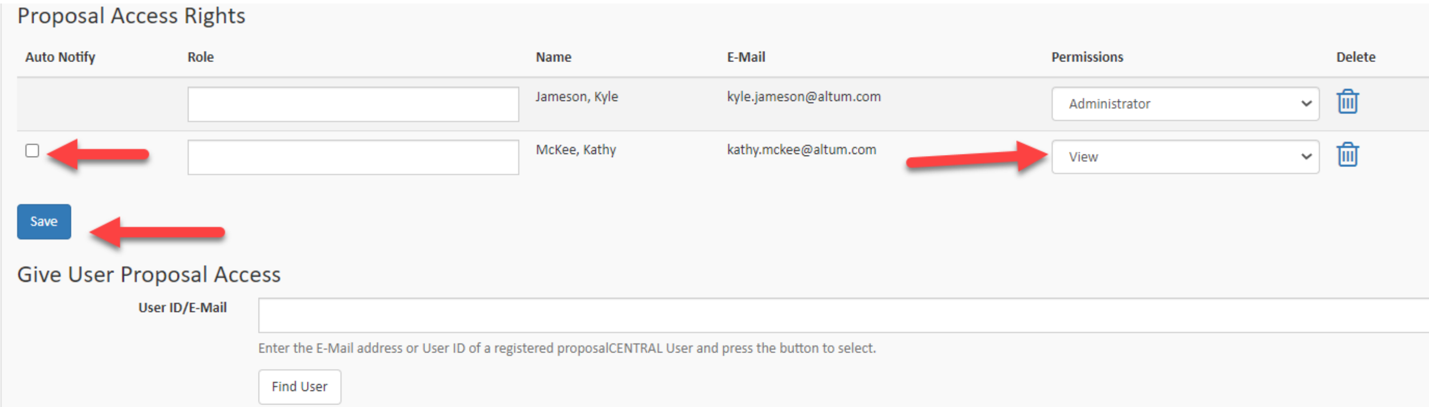
3. You can enter a role for the person, if desired. Please note that the role included here is NOT connected to any roles listed for users on either the institution officials or key personnel pages. Additionally, select the desired permission level for the person and click the **Accept Changes** button. The permissions are as follows:

    - Administrator: The user can make any changes to the application, including granting other users access to the application.

    - Edit: The user can make any changes to the application. However, they cannot submit the application or grant other users access to the application (i.e. what you’re doing now) or see who has access.

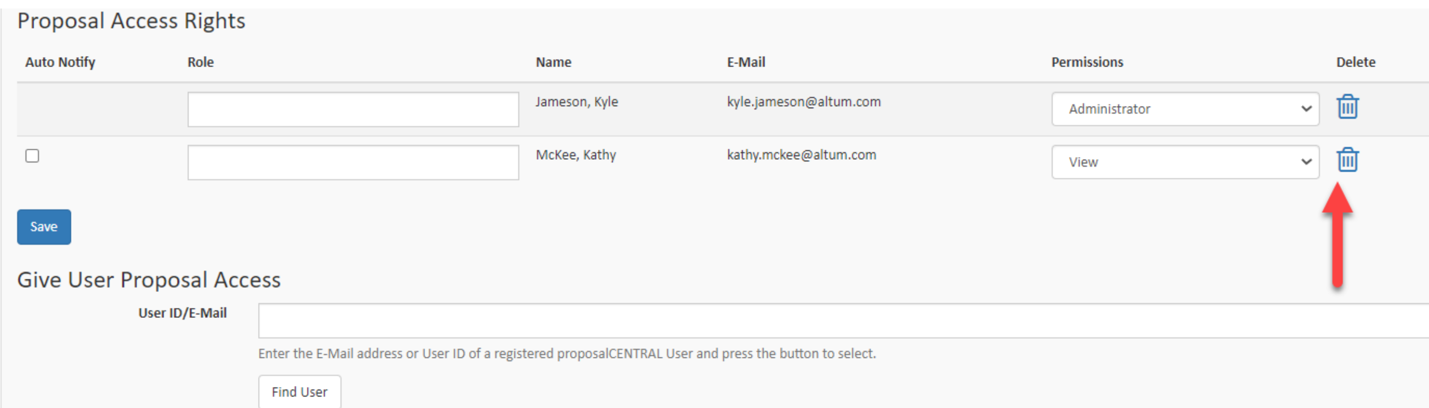
- View: The user can only see the application; they cannot make any changes.

If you want the person to receive the system notifications as well (e.g. application submission e-mail), check the box in the Auto Notify column and click the **Accept Changes** button.

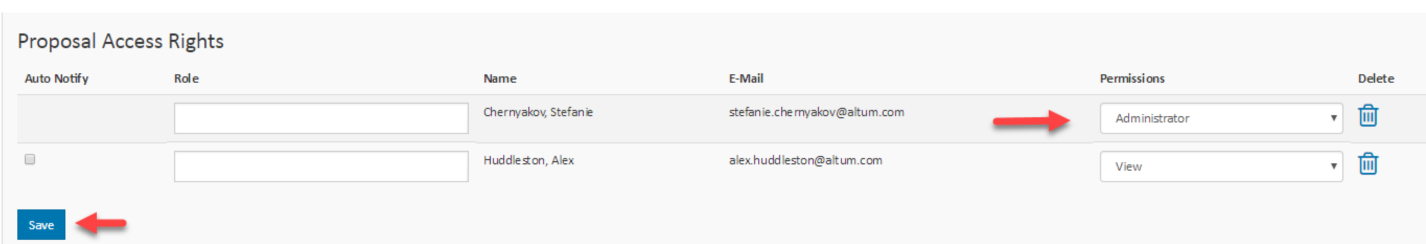


4. To enable others to access the application, repeat steps 2-3.

If you need to remove a user's access to the application, click the trash can icon next to the desired user.



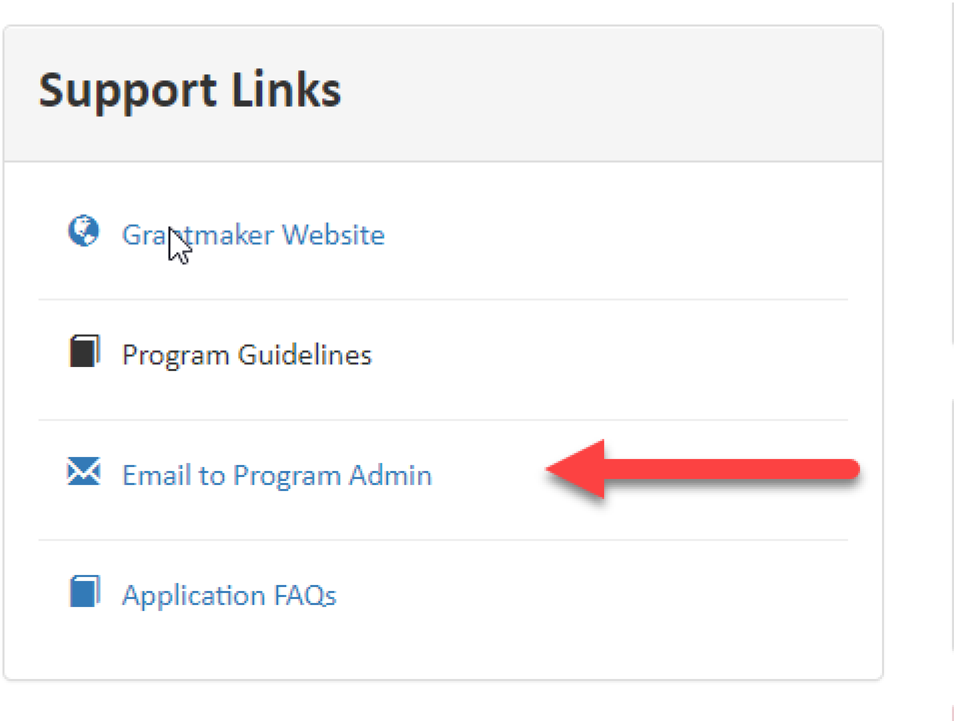
Alternatively, you can modify a user's access level by changing the permission level in the Permissions column and clicking the **Save** button.



Working in Various Application Sections:

ProposalCentral allows grant makers to create applications customized to their needs. Applications can look different between grant makers and even across programs within a grant maker. *Therefore, the application you're working on* *may look different than what is shown below.* However, the general instructions regarding how features work still apply. When in doubt, you can contact:

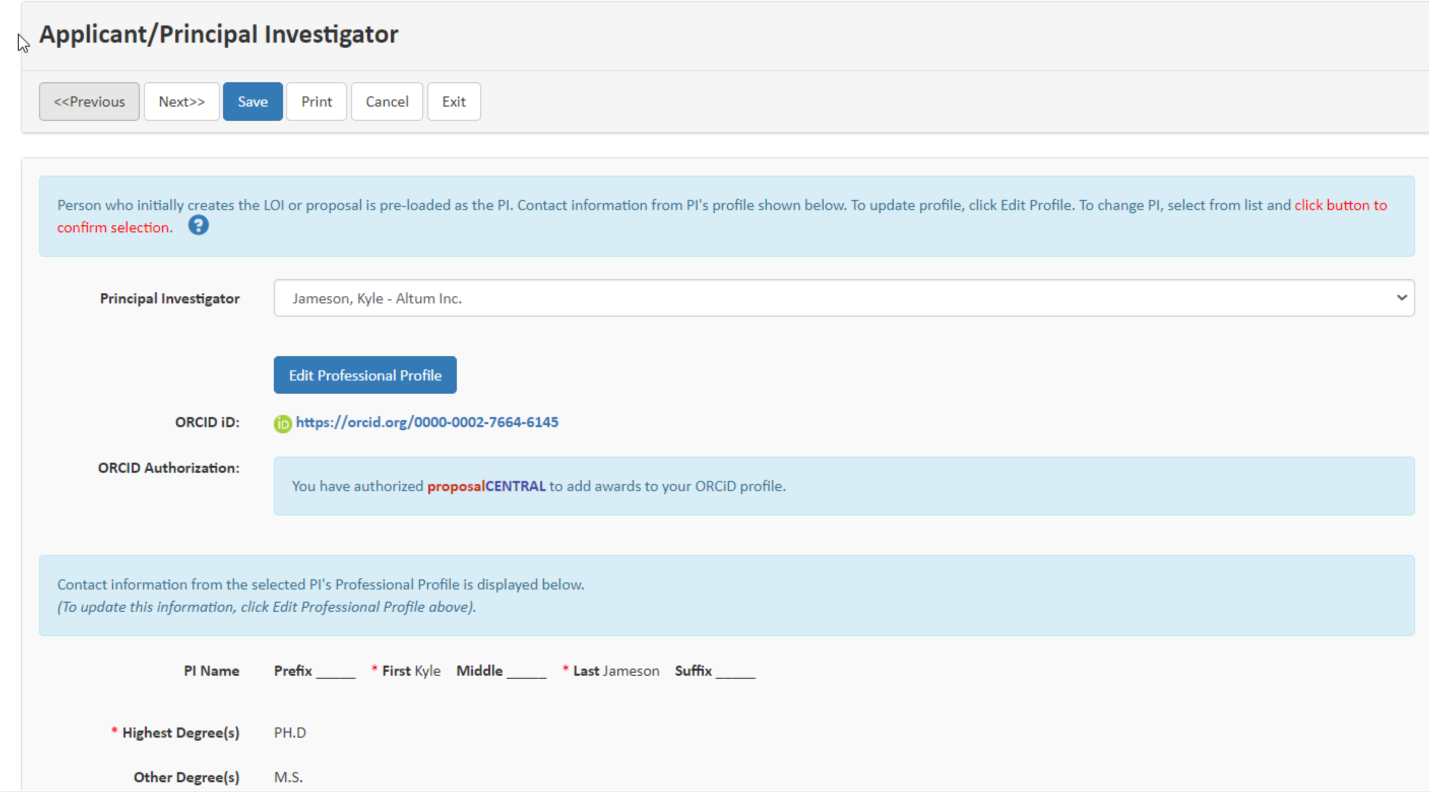
- The grant maker for questions regarding the expected type of information to provide. You can click the "Email to Program Admin" link found in the "Support Links" section of the gray menu on the right.



- The ProposalCentral team for questions about "how" to do something. The Customer Support contact information is found on the top right of this tutorial.

Applicant Page

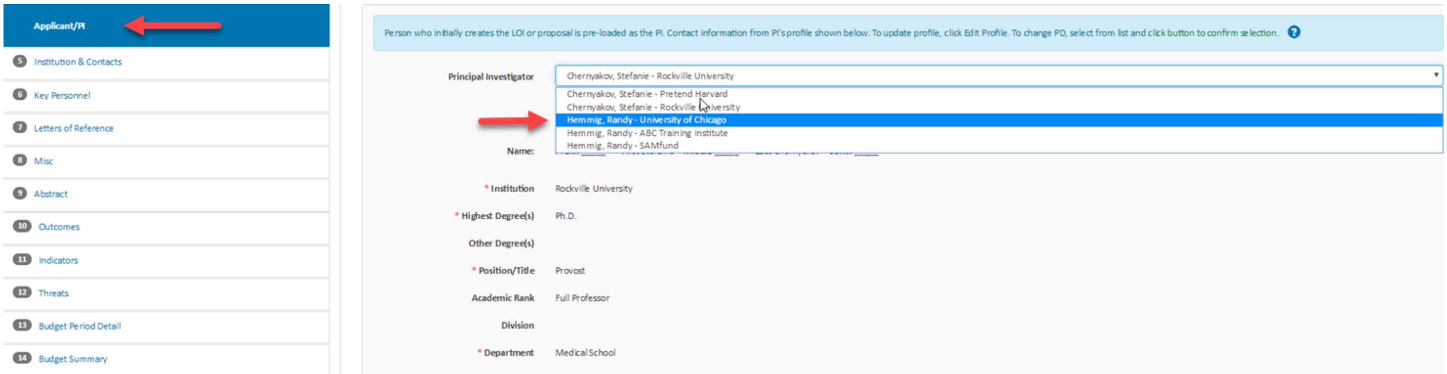
Most grant makers collect information about the PI/applicant in the application. Depending on the grant maker's needs, instead of a PI/applicant, they may request information for a main contact or a director. Make sure to read the instructions the grant maker provided at the top of the page to understand which person they are requesting.



Change Applicant

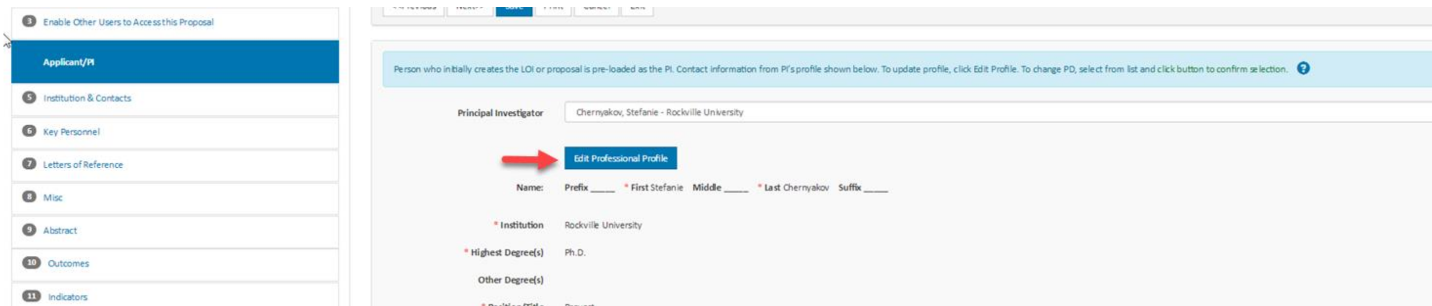
If the person listed in the drop-down menu is not the correct person, select the appropriate person from the drop-down meu and click the **Save** button. If the desired person is NOT listed in the drop-down menu, follow the instructions below:

1. The person who should be the applicant must have an account in ProposalCentral. If they have an account already, skip to the next step. If they do not have an account, they must create one. They can use the instructions found in the "How to Register as a ProposalCentral user" tutorial.
   Once the applicant has an account, you must provide "Administrator" access to the application in the "Enable Other Users to Access this Proposal" section. See the instructions for adding other users found in this tutorial.
2. Now that the applicant has access, they must:
   a. Go to https://proposalcentral.com/ and login below "Application Login".
   b. Click the blue Proposals tab and the "In Progress" link in the **Proposal Status** dropdown menu.
   c. Click the **Edit** button next to the application.
   d. Within the application, the applicant needs to go to the Applicant/PI section, select his/her name from the drop-down, and click the **Save** button.

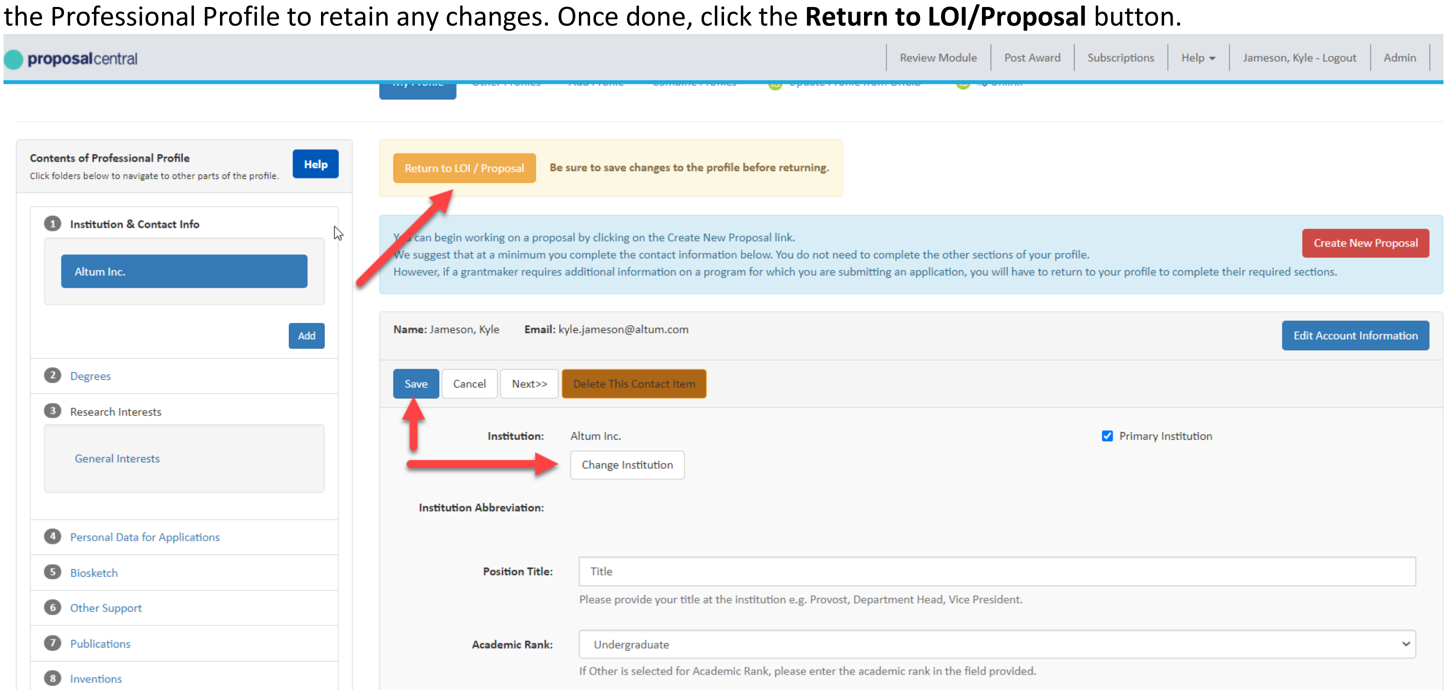


Update Information Showing

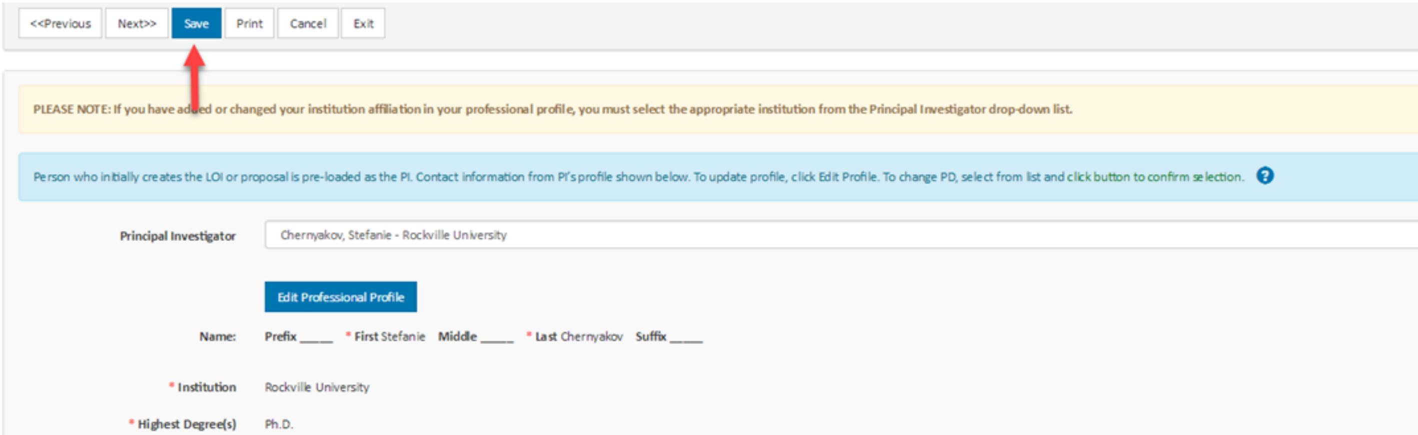
If the contact information for the selected applicant is incorrect or incomplete, click the **Edit Professional Profile** button.



This directs you to the Professional Profile where you can update information. Make sure to click the **Save** button within the Professional Profile to retain any changes. Once done, click the **Return to LOI/Proposal** button.



After returning to the application, click the **Save** button within the application to have your application updated with the changes.

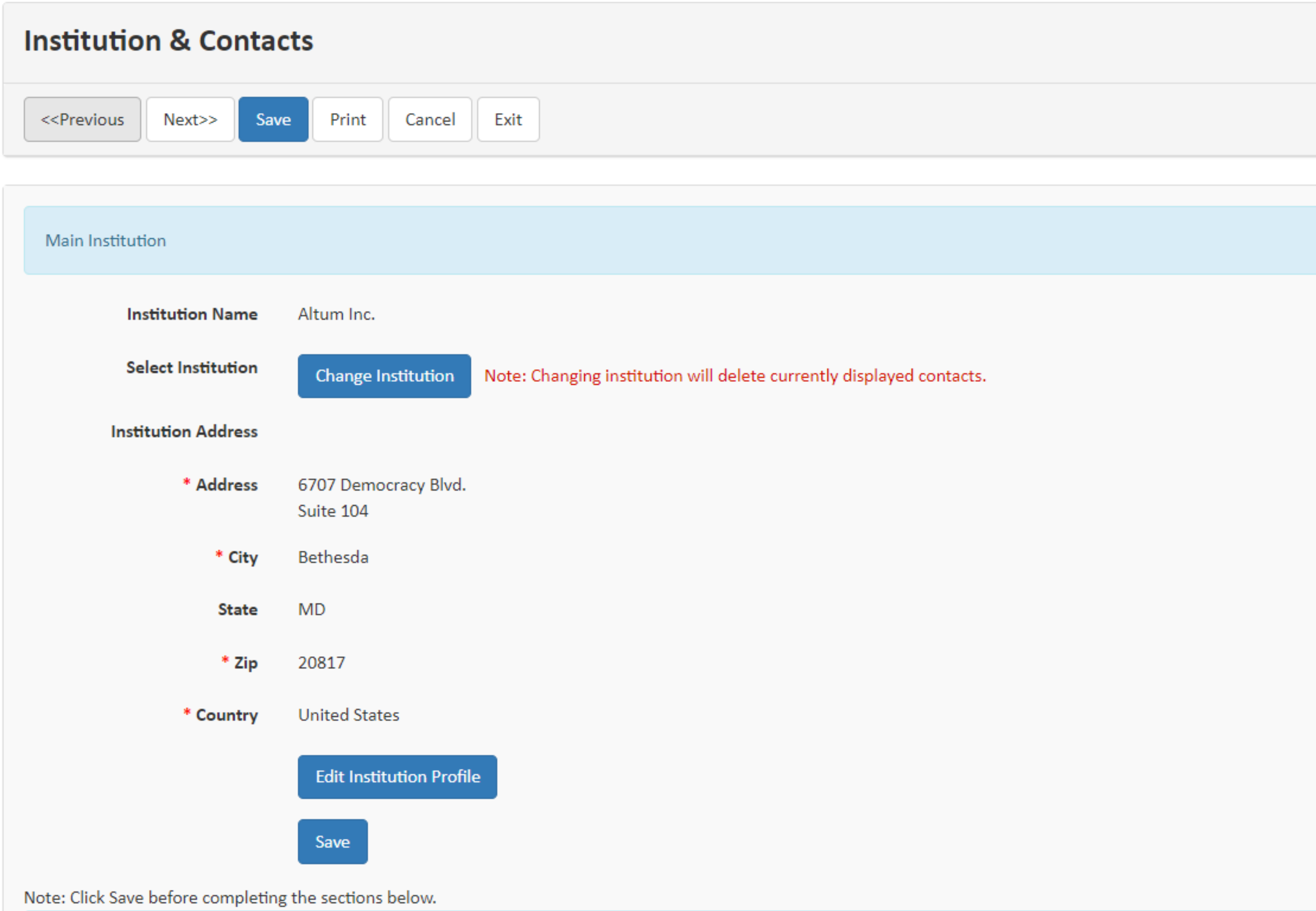


If you do not have the **Edit Professional Profile** button, it means you do not have access to the applicant's Professional Profile. Please note that this is different than having access to the application. If the applicant wants you to update his/her Professional Profile, the applicant must give either "Administrator" or "Edit" privileges to his/her Professional Profile. They can use the instructions found in the "How to Register as a ProposalCentral user" tutorial.

Once the applicant has granted you either "Administrator" or "Edit" privileges to his/her Professional Profile, you can follow the instructions found in the beginning of this section.

Institution Page

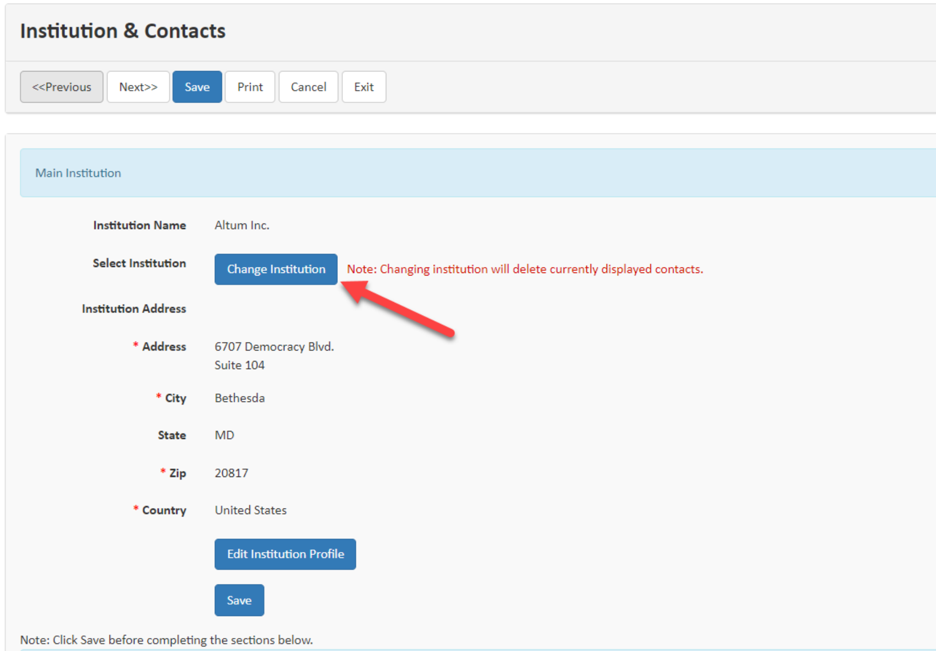
Most grant makers collect information about the institution in the application. Make sure to read the instructions the grant maker provided at the top of the page. By default, the Primary Institution listed for the person who started the application is the institution listed.



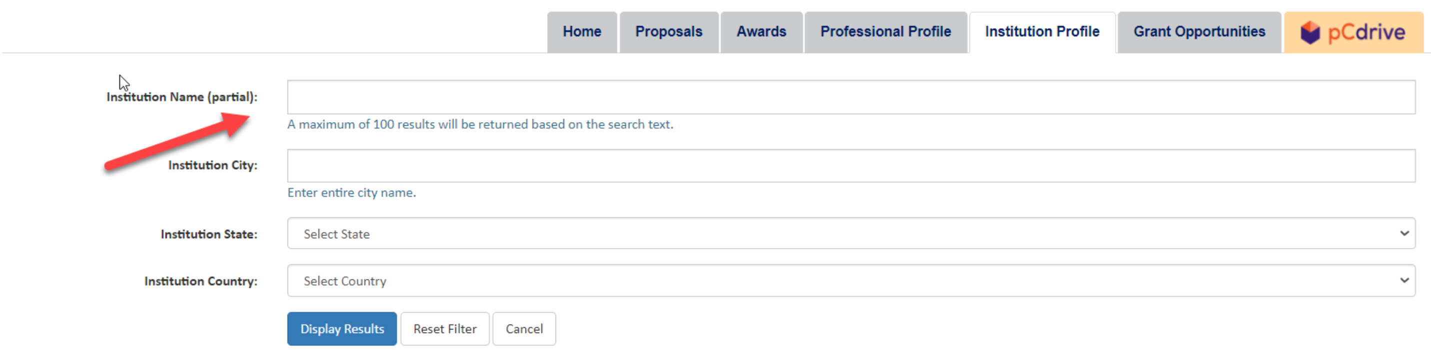
Change Institution

To change the institution:

1. Click the **Change Institution** button.

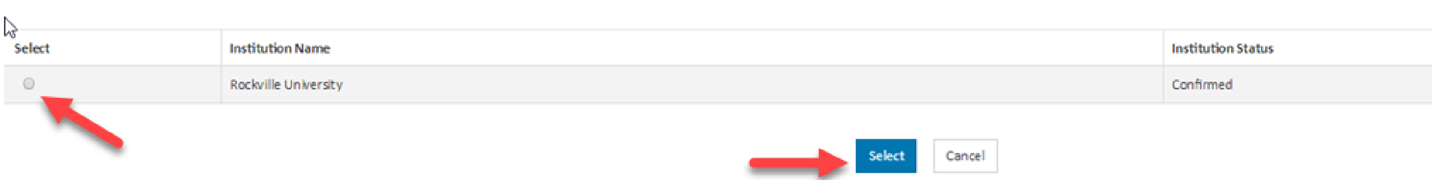


2. Enter a partial name search for your organization and click the **Display Results** button.

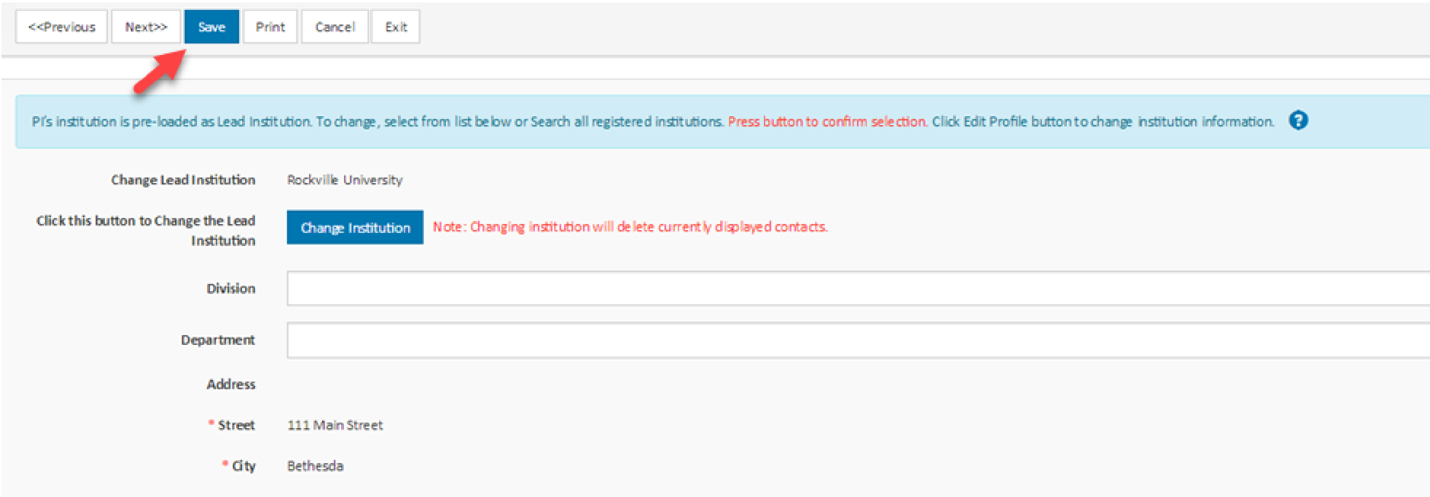


TIP: Make sure to include a key word from your organization's name, but not the complete name. For example, if your organization is "The University of America in DC", search for "University of America" or even more generally "America".

3. If:
   a. **<u>Your institution is listed</u>**, select it by clicking the radio select in the left column and click the **Select** button at the bottom.

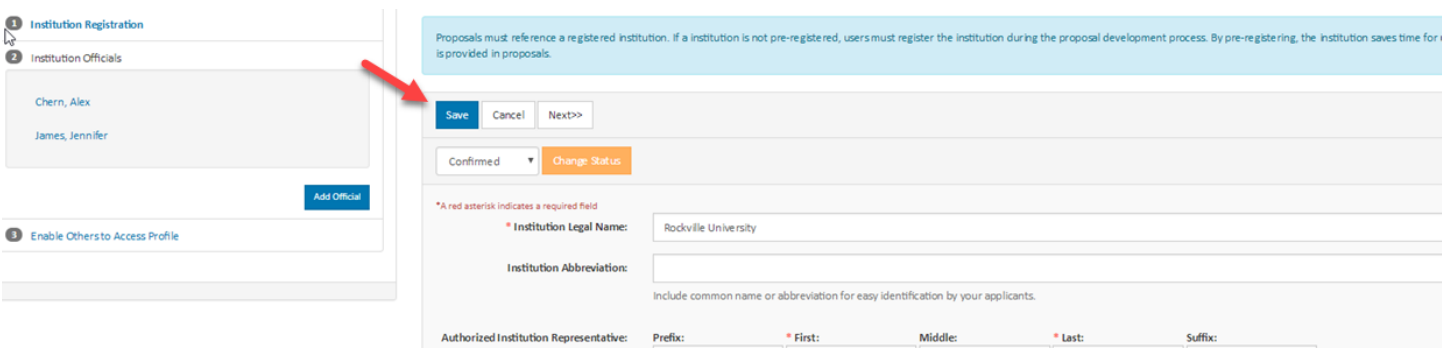


   b. **<u>Your institution is NOT listed</u>**, see the "How to Register your Institution with ProposalCentral" instructions for information on how to create a new Institution Profile.
4. After selecting the appropriate Institution Profile (3a above), you are returned to your application. Click the **Save** button within the application to retain your changes.

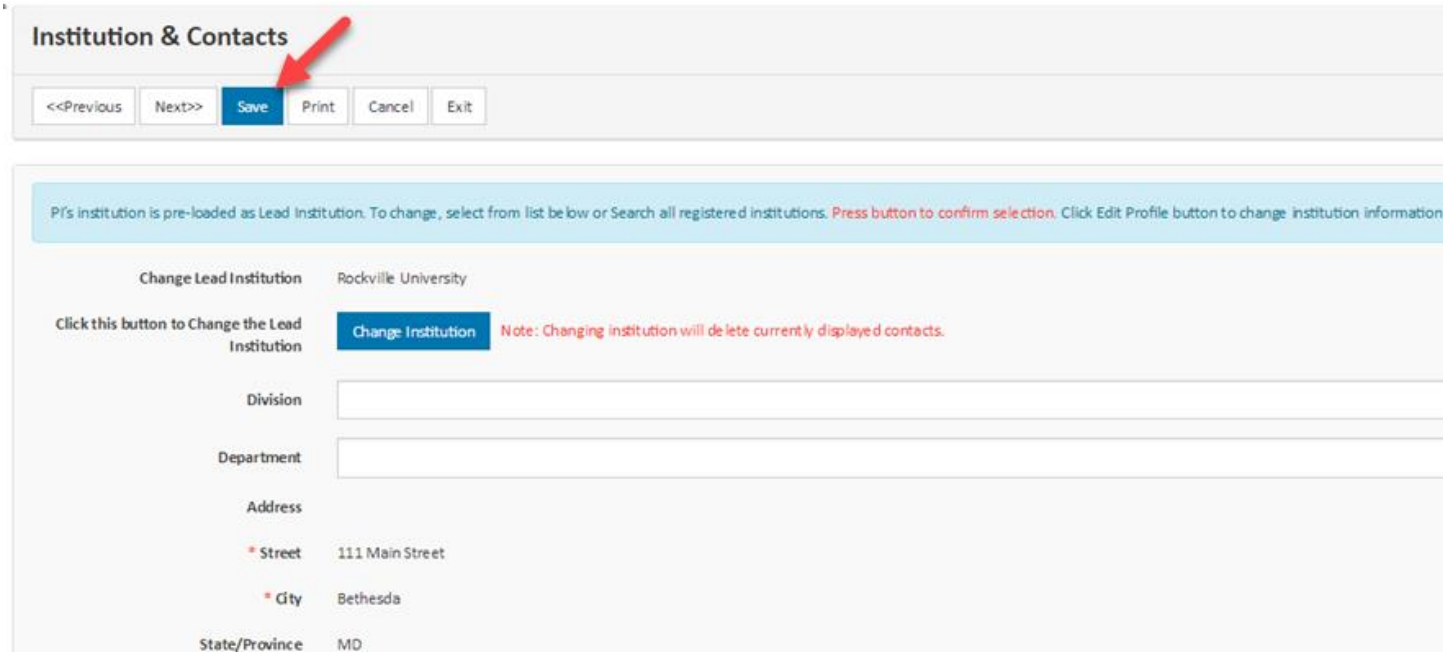


Update Information Showing

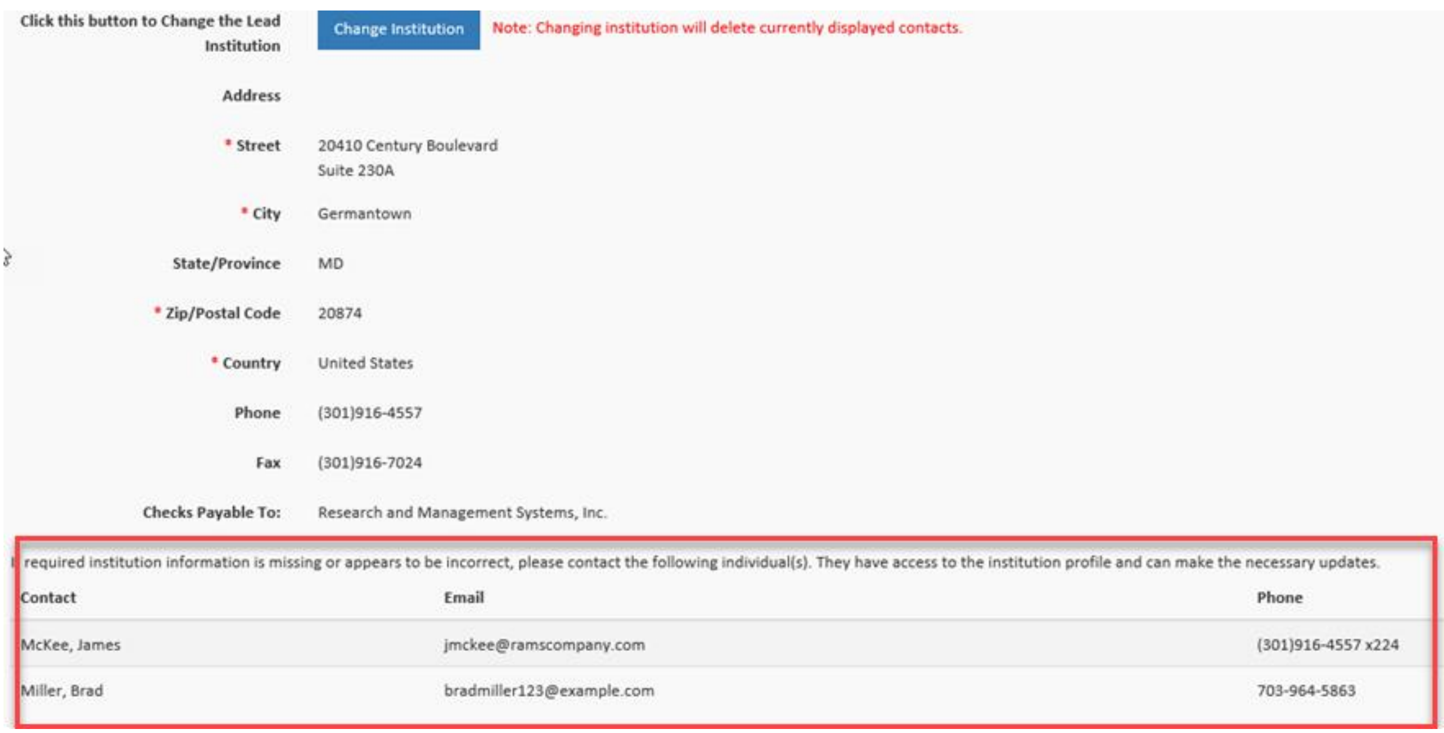
Only people with access to the institution's profile can update it. If you see an **Edit Institution Profile**, you can edit the Institution Profile by clicking that button. Once you've clicked the **Edit Institution Profile** button, you are directed to the Institution Profile information where you can update information. Make sure to click the **Save** button within the Institution Profile to retain any changes. Once complete, click the **Return to LOI/Proposal** button.



When you have returned to the application, click the **Save** button within the application to have your application updated with the changes.

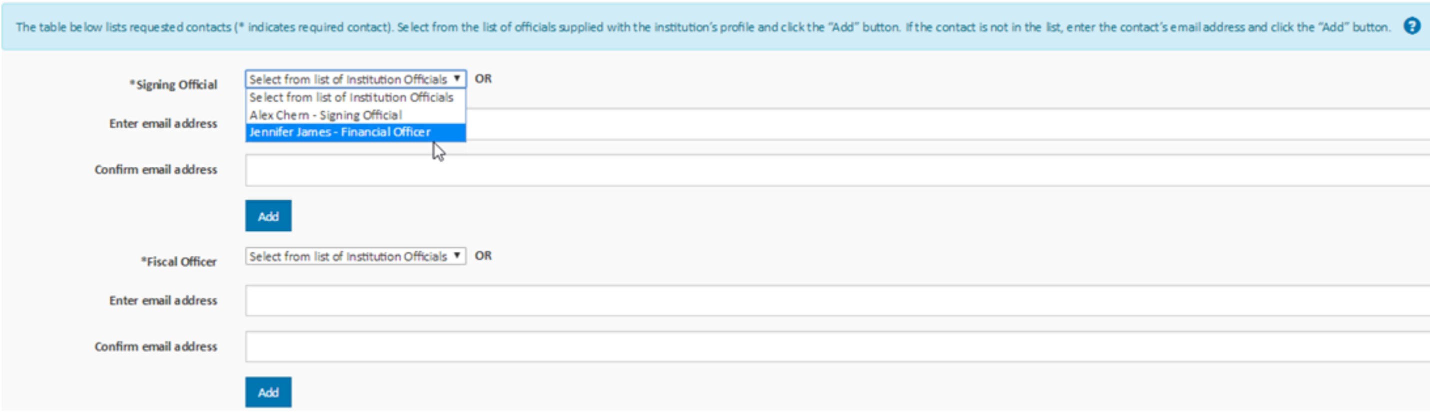


Below the information about the institution is the name, e-mail, and phone number of the person at your institution who created the profile and should have access to update it. Contact that person to have them make the necessary changes. If that person is no longer at your institution, contact Customer Support (pcsupport@altum.com) to find out if there are other individuals at your institution who can update the institution profile.



Adding Institution Contacts

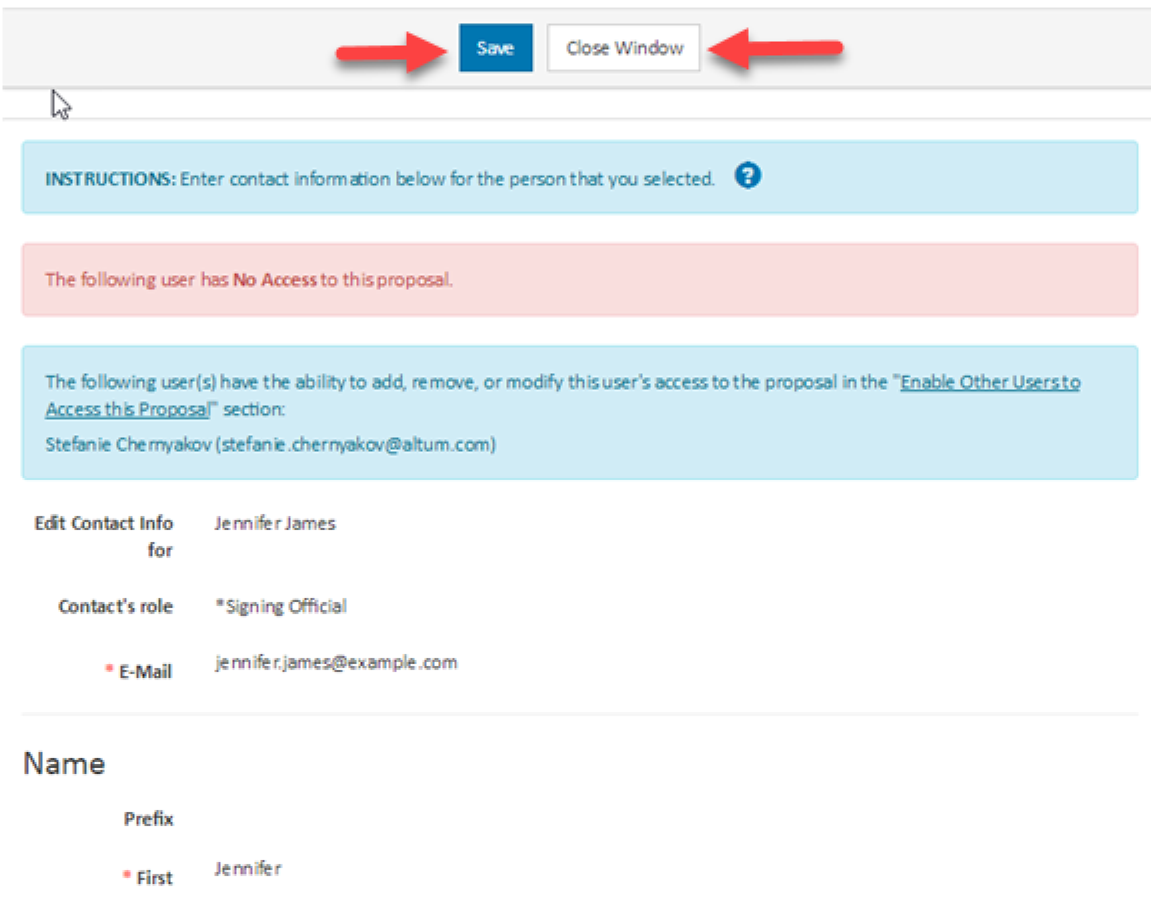
Some grant makers collect information about institution officials. If so, the institution official roles requested display at the bottom. Those that are required for submission are indicated with an asterisk (*****). If the Institution Profile that was selected as the institution for the application has officials added to the profile, those individuals display in the drop-down menu for each role. You can select the appropriate person and click the **Add** button. If the appropriate person is not listed in the drop-down menu, you can add their e-mail twice and click the **Add** button.



Regardless of which method you used to add the institution official, a new window opens with the person you selected/entered. If the person you selected/entered:

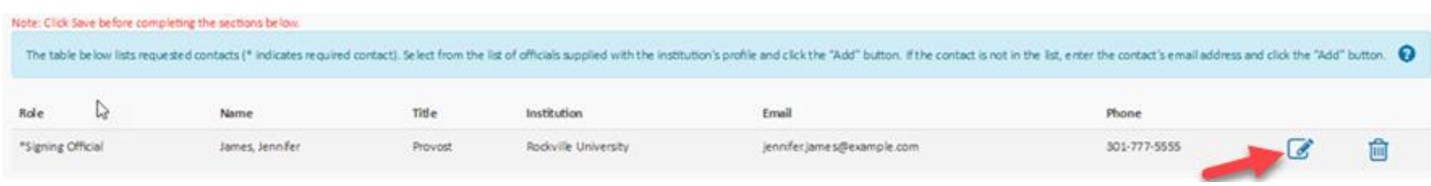
- **Already has an account in ProposalCentral**, the contact information from their Professional Profile displays. You can update the text showing and click the **Save** button. Any information you change here does NOT change the information in the person's profile, only in the application. When done working with the contact, click the "Close Window" link.

- **Does not have an account in ProposalCentral,** you need to supply the contact information for the user. When the **Save** button is clicked, an account is automatically created for the person with the contact information supplied. When done working with the contact, click the "Close Window" button.

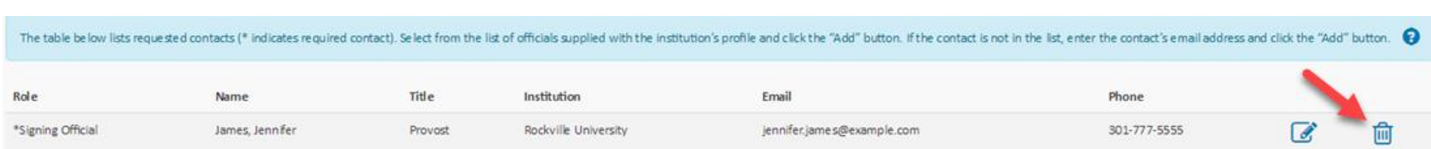


NOTE: When you add an institution official on this page, it does NOT give the person access to the application. If you want the person to have access to the application, you must provide it on the "Enable Other Users to Access this Proposal" section.

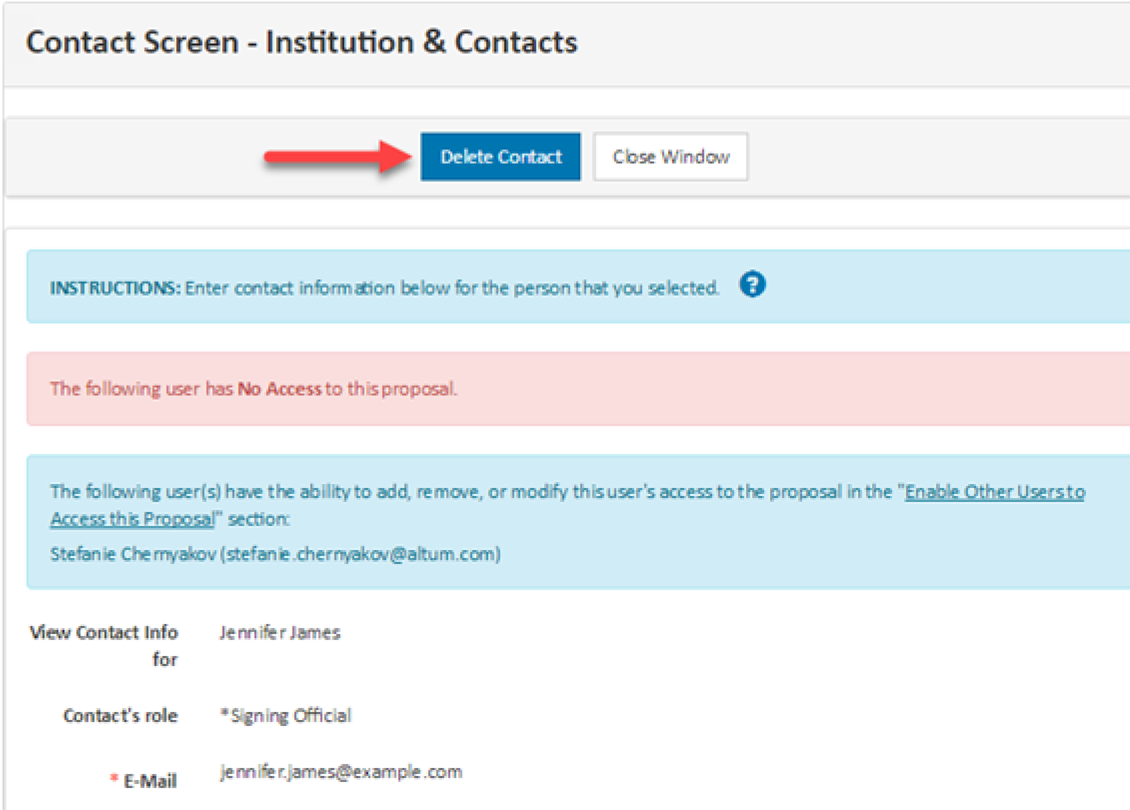
After the person is added, if you need to edit the contact information included, click the "Edit" link next to their name. You are returned to the contact page where you can make changes. Click the **Save** button to retain your changes and the "Close Window" button to complete the step.



If you selected the wrong person and need to change it, click the trash can icon.



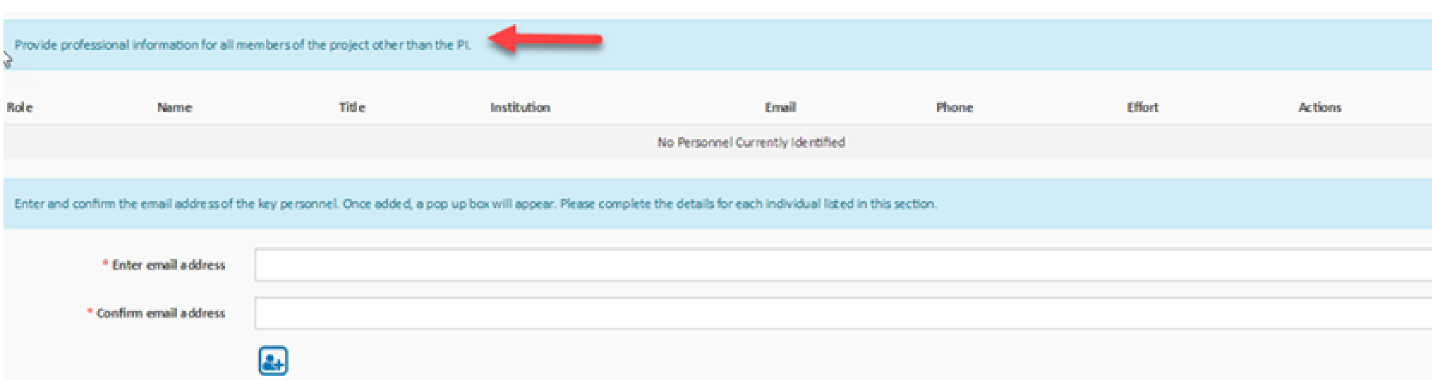
The same pop-up window appears. Within the window, click the **Delete Contact** button.



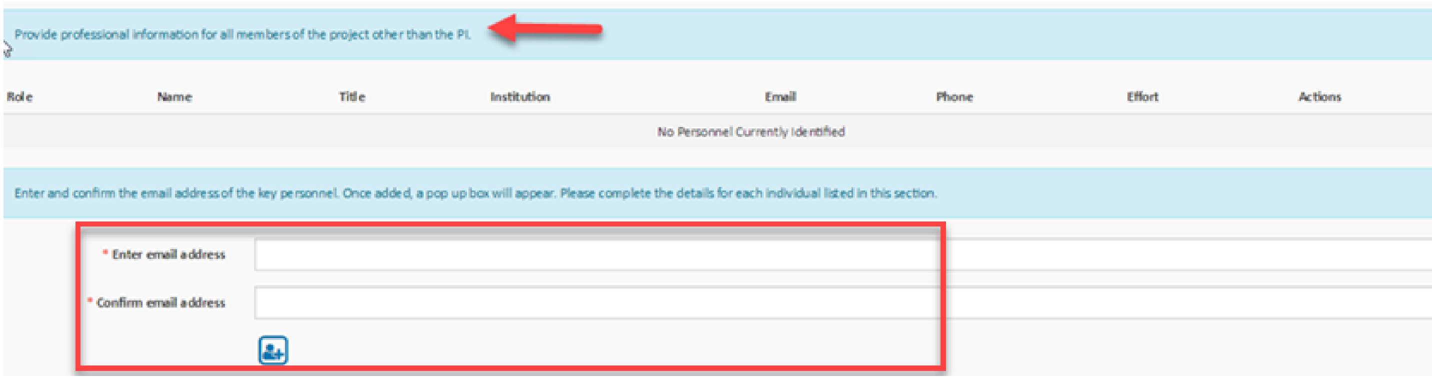
After the deletion is confirmed, click the "Close Window" link.

Key Personnel (aka Project Personnel)

Most grant makers collect information about project personnel in the application. Make sure to read the instructions the grant maker provided at the top of the page.



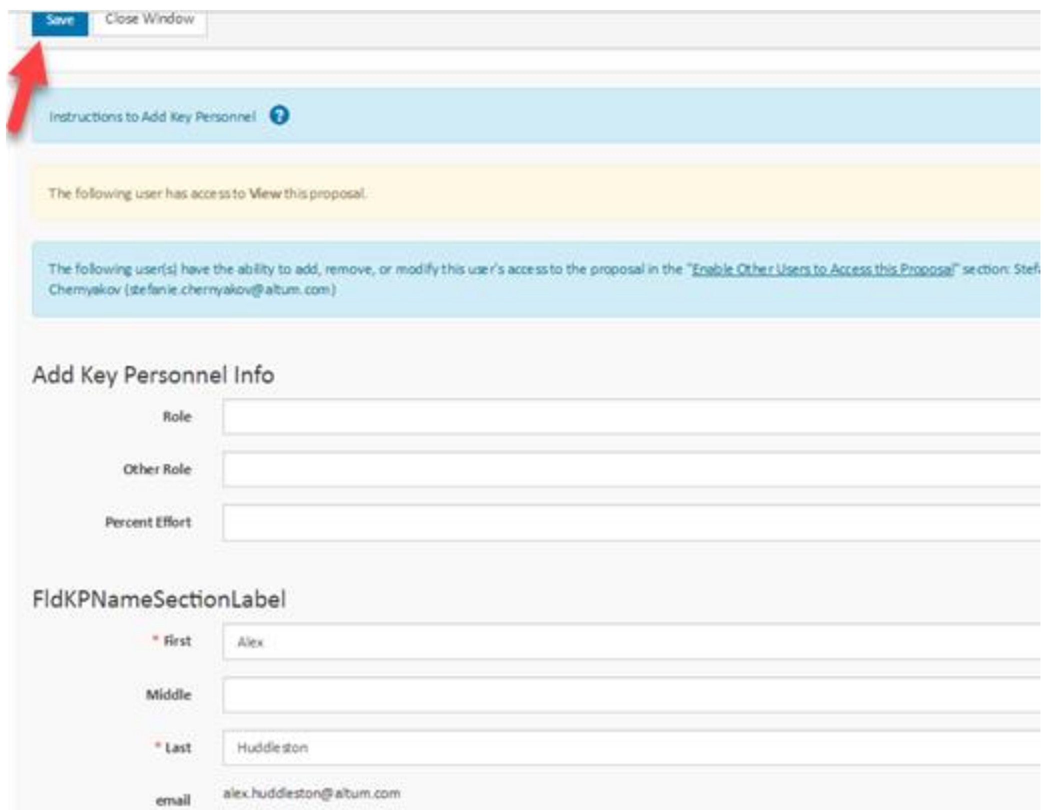
To add the requested individuals, enter the e-mail address twice and click the **Add** icon.



A new window displays with the person you entered. If the person entered:

- **<u>Already has an account in ProposalCentral</u>**, the contact information from their Professional Profile shows. You can update the text and click the **Save** button. Any information changed here does NOT change the information in the person's profile, only in the application. Also, if the grant maker requested a "role" for the person, make sure to select/enter the information. If a role drop-down menu is supplied, users with an asterisk (*) must be added in order to submit an application. When done working with the contact, click the "Close Window" link.

- **<u>Does not have an account in ProposalCentral,</u>** you will need to supply the contact information for the user. Clicking the **Save** button, automatically creates an account for the person with the contact information supplied. Also, if the grant maker requested a "role" for the person, make sure to select/enter the information. If a role drop-down menu is supplied, users with an asterisk (*) must be added in order to submit an application. When done working with the contact, click the "Close Window" link.



NOTE: When you add a person on this page, it does NOT give the person access to the application. If you want the person to have access to the application, provide it on the “Enable Other Users to Access this Proposal” section.

After the person has been added, if you need to edit the contact information included, click the edit icon next to their name. You are returned to the contact page where you can make changes. Click the **Save** button to retain your changes and the “Close Window” link to complete the step.

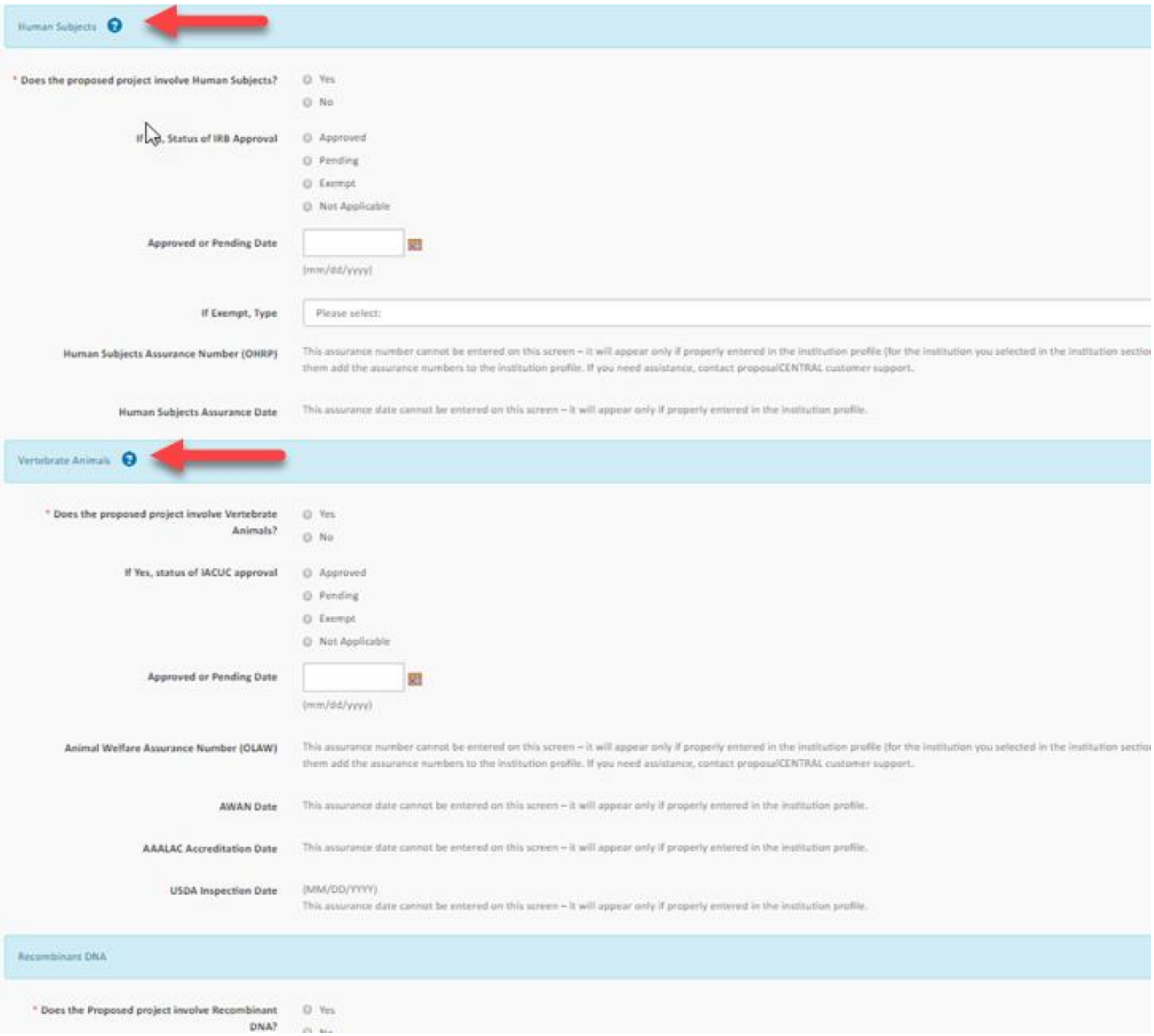
Role	Name	Title	Institution	Email	Phone	Effort	Actions
	Huddleston, Alex	Department Head	University of California, Irvine	alex.huddleston@altum.com	111-222-3333		

If you need to remove the person, click the delete icon.

Role	Name	Title	Institution	Email	Phone	Effort	Actions
	Huddleston, Alex	Department Head	University of California, Irvine	alex.huddleston@altum.com	111-222-3333		

Organizational Assurances

Some grant makers collect organization assurances/certifications from applicants (e.g. IRB, IACUC, rDNA). Make sure to read the instructions provided by the grant maker.



If required to enter either an OHRP (for IRB) or OLAW (for IACUC) number, this must come from the Institution Profile. If it's missing (or incorrect), the institution profile must be updated to include this information. Only people 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 typically found in the gray 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 your institution who created the profile and should have access to update it.

If that person is no longer at your institution, contact Customer Support (pcsupport@altum.com) to find out if there are other individuals at your institution who can update the institution profile.

Other Support

There is a tutorial dedicated to Other Support. Please see the “How to Add Other Support” tutorial.

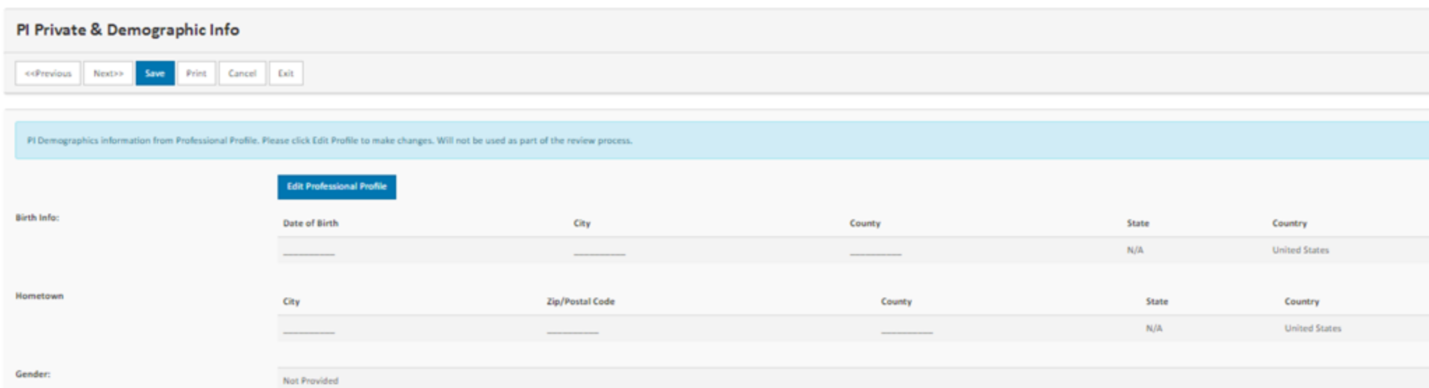
Publications

There is a tutorial dedicated to Publications. Please see the “How to Add Publications” tutorial.

Applicant Personal Data (aka demographic data)

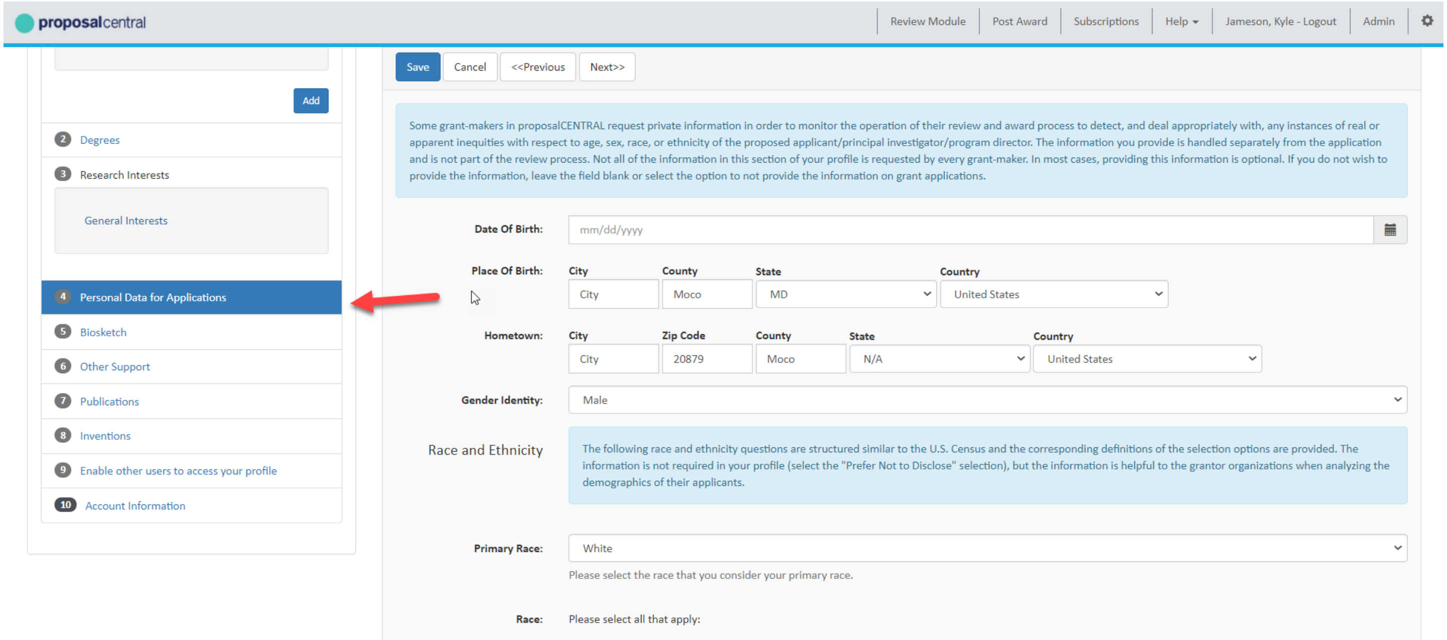
Some grant makers request the personal data (e.g. gender, race, ethnicity) from the applicant’s Professional Profile. Only the applicant and those with administrator access to the applicant’s Professional Profile see this page and update the information.

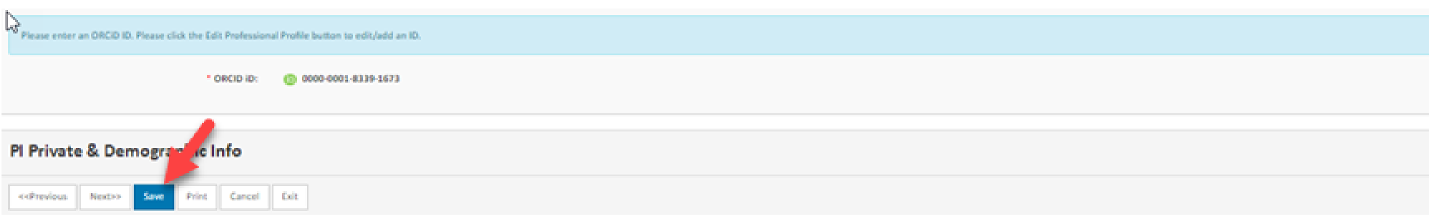
To update the information, click the **Edit Professional Profile** button.



This directs you to the Professional Profile main page. Click the Personal Data for Applications link found in the gray menu on the left. Make the necessary changes and click the **Save** button to retain any changes. Once done, click the **Return to LOI/Proposal** button.

Upon returning to the application, click the **Save** button within the application to have your application updated with the changes.





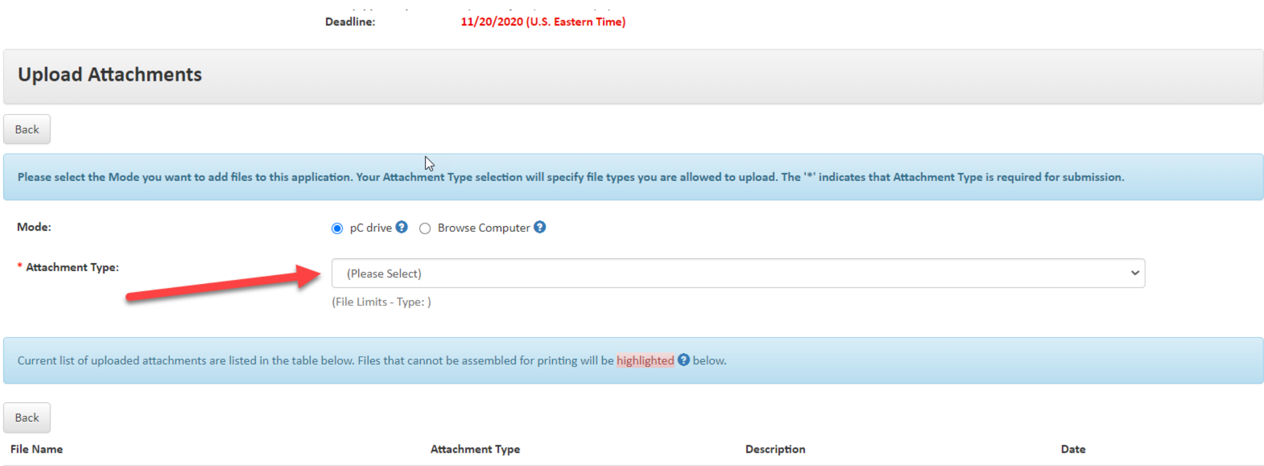
If you did not have the **Edit Professional Profile** button, you do not have access to the applicant's Professional Profile. Please note that this is different than having access to the application. If the applicant wants you to update his/her Professional Profile, the applicant must give you either "Administrator" or "Edit" privileges to his/her Professional Profile. Applicants can use the instructions found in the "How to Register as a ProposalCentral user" tutorial.

Once the applicant has granted either "Administrator" or "Edit" privileges to his/her Professional Profile, you can follow the instructions found in the beginning of this "Applicant Personal Data (aka demographic data)" section.

Upload Documents

Most grant makers include a section in the application to collect files from the applicant. To upload a document in this section:

1. Click the Attach Files button.
2. If you subscribe, to pC Drive, you may choose the file from here
3. Select the attachment type.
4. Provide a description.
5. Drag the file or click to browse and upload the attachment.
6. If you are a subscriber to pC Drive, you can upload up to 5 documents at once.



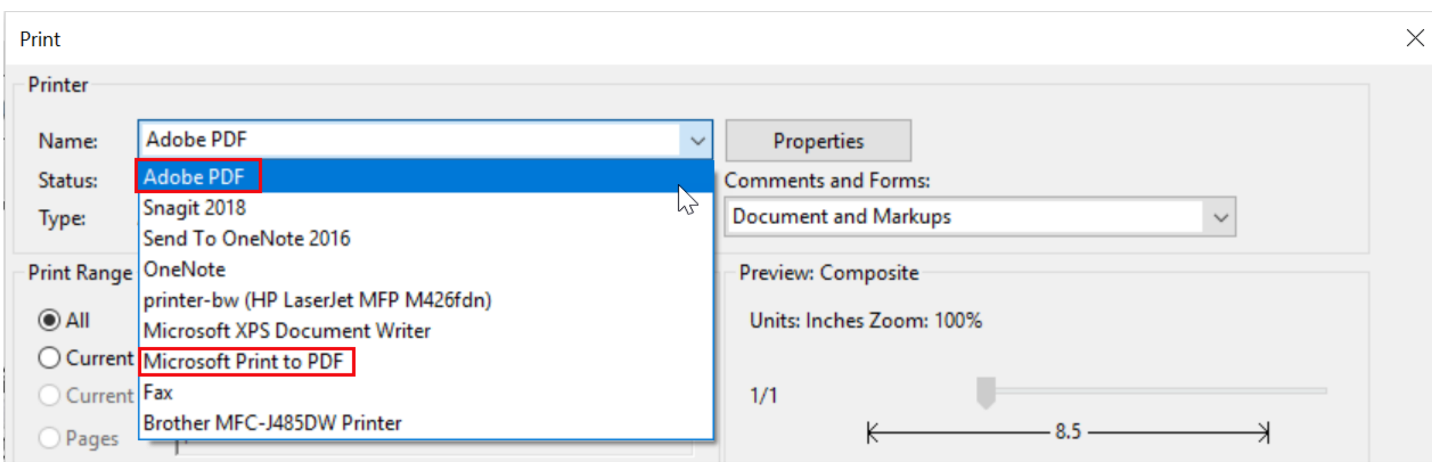
If there was an error with the file, it MAY show as red in the list of uploaded attachments. Examples of issues that cause errors with files are password protection and file corruption. Please note that not every issue with a file can be identified during the upload process and show as red. Use the PDF application feature to make sure that all Word and PDF files uploaded are included. The absence of a file MAY indicate that there was an error. Again, refer to the PDF Application section for information.

To replace a "bad" file:

1. Click the trash can icon next to the file to replace.

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

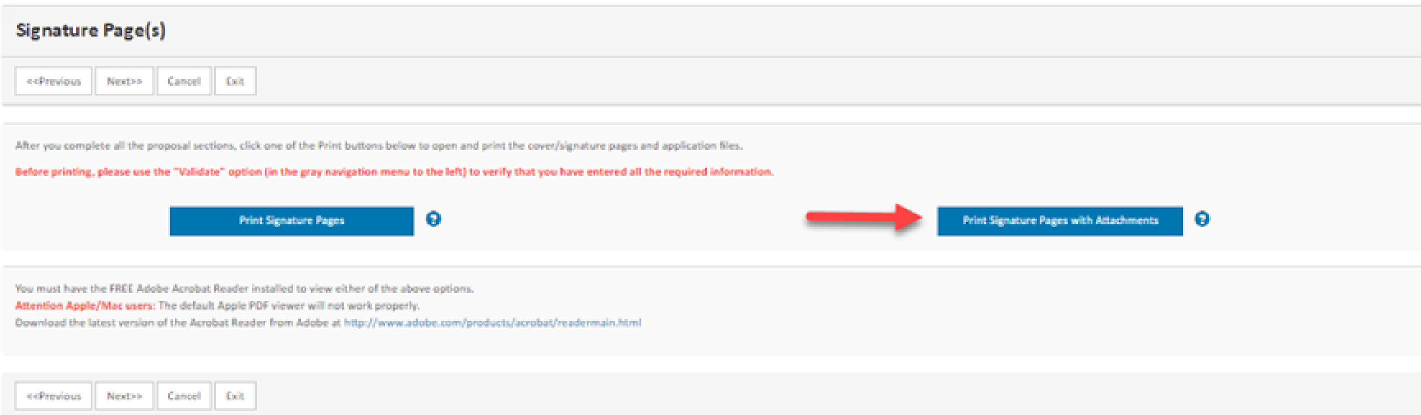
3. Open the original file from your computer using either Adobe Professional or Adobe Reader. When you print the file, select the respective .pdf converter tool from the printer dialog box "Name" drop-down menu and click the **Print** button. Save the new file that is created.



4. Return to the application section where you previously uploaded the files. Repeat the steps at the beginning of this section regarding uploading a file.

PDF of 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. It is located between the Validate and Submit sections in the gray menu on the left. Clicking the **Print Signature Pages with Attachments** button on the right generates a PDF that includes several standard templates (e.g. signature page, contacts, abstracts), followed by all Word and PDF documents that you uploaded.



Some grant makers require the applicant to print the signature page, have it signed, and upload it in the section described earlier. Make sure to refer to the grant maker’s Program Guidelines for information on required attachments.

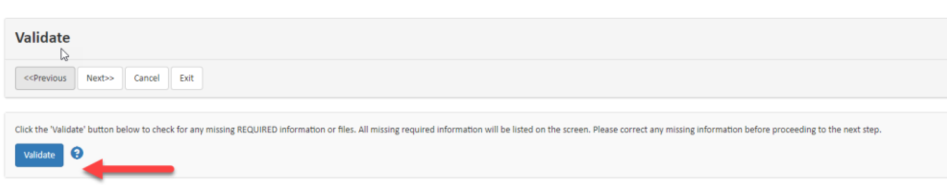
When you click the **Print Signature Pages with Attachments** button, make sure that all Word and PDF attachments included are showing. If not, there are a few reasons why:

1. 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 #2.

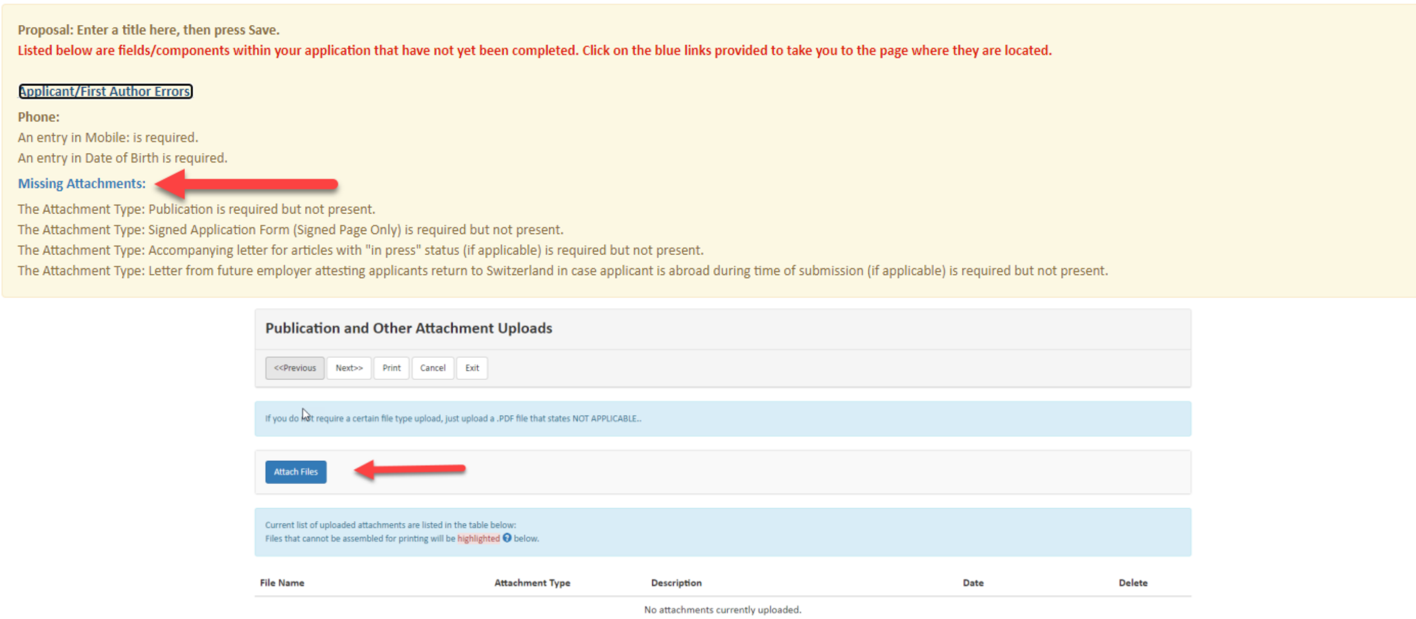
2. There may be an error with the file you uploaded. The two most common errors are corrupted or password protected files. The way to fix this is to remove the file that has errors, regenerate the PDF, and upload again.
3. If # 1 did not apply to your situation and #2 did not resolve the issue, contact pcsupport@altum.com for assistance.

How to Validate the Application

Every application has a section called “Validate”. Clicking the **Validate** button runs a check of your application and lets you know if there is required data and/or files missing.



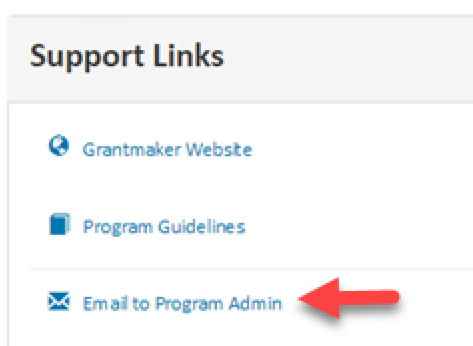
If you are missing information, both the missing item and the section where it can be found are listed. Clicking the link redirects to the section where the missing item is found.



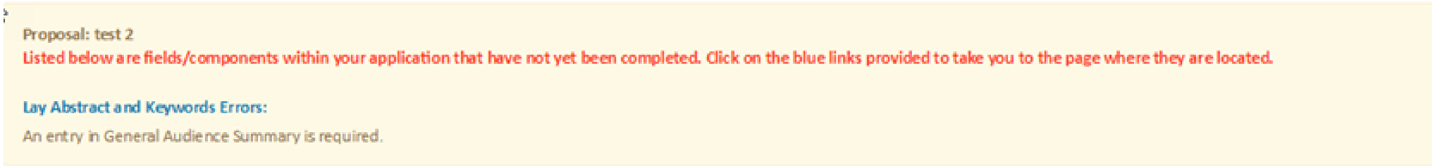
Validate the application as many times as you like. If you validate the application and nothing is missing, the system does not automatically submit it for you**. You must go to the "Submit" page in order to submit the application.**

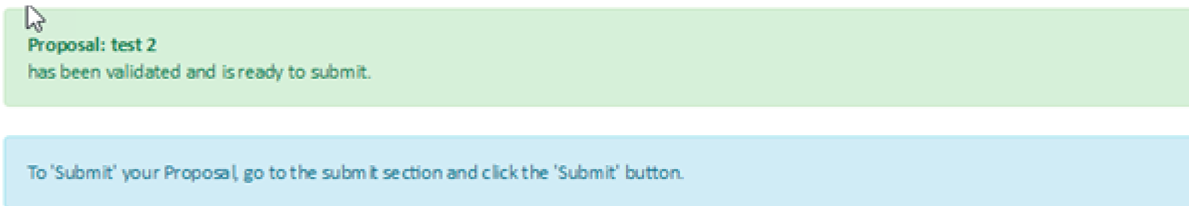
How to Submit the Application

Every application has a section called "Submit". However, if the deadline for your application has passed, the section does NOT display. **ProposalCentral Customer Support cannot provide deadline extensions; only the grant maker can**. To request a deadline extension, contact the grant maker by clicking the Email to Program Admin link found in the "Support Links" section of the gray menu on the right.

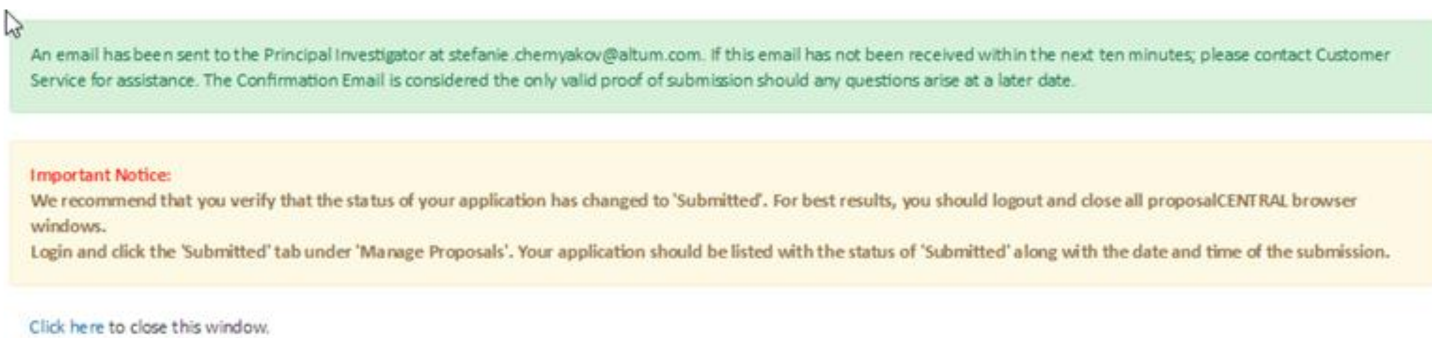


When ready to submit your application, click the **Submit** button. Before submission, the system automatically runs a check of the application to make sure no required data and/or files are missing. If there are any missing requirements, an error message returns indicating what information needs to be supplied before you can submit.



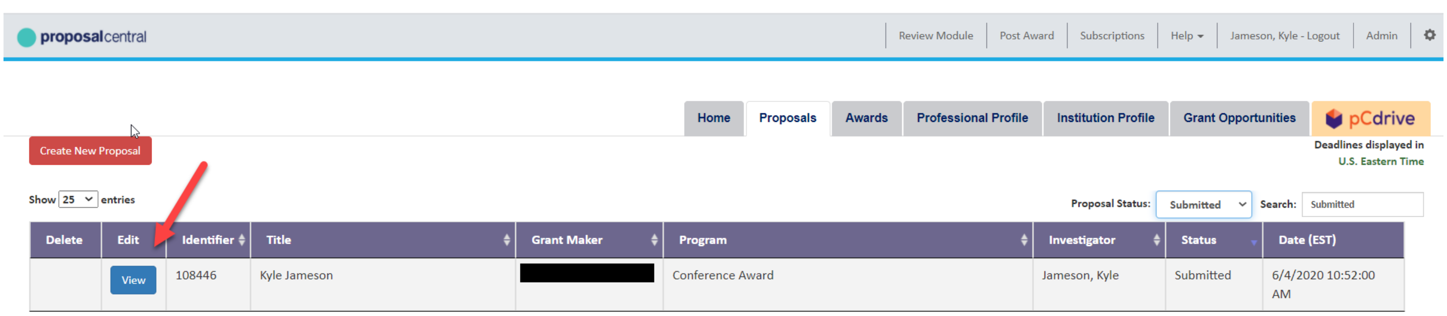


If all required information is provided, the application is submitted. A confirmation message shows on the screen and an e-mail is sent to the applicant and any other users listed on the "Enable Other Users to Access this Proposal" with a check in the "Auto Notify" column.



If the application submitted was an LOI, it is found in the "In Progress" status next to **Proposal Status** within the Proposals tab. Please note that the Status column indicates "Submitted". However, you may need to refresh your browser to see the updated status if you check this immediately after submission. Click the **View** button to see the application information submitted.

If the application submitted was a Proposal, it is found in the "Submitted" status next to **Proposal Status** within the Proposals tab. Click **the** View button to see the application information submitted.



Unsubmitting An Application

After an application is submitted, you have the option to unsubmit it to make changes, if necessary. The unsubmit option is ONLY available if:

- The application deadline is in the future.
- The grant maker has not already added the application to a committee for review.

If you unsubmit your application, you do not lose any data that was previously submitted. You see the application exactly as it was prior to submission. To unsubmit, click the Unsubmit link found next the View button.

Delete	Edit	Identifier	Title	Grant Maker	Program	Investigator	Status	Date (EST)
	View	90672	test 3	Andrew McDonough B+ Foundation	Childhood Cancer Research Grant	Chernyakov, Stefanie	Submitted	7/5/2017 11:00:14 AM
Unsubmit	View	90671	test 2	Andrew McDonough B+ Foundation	Childhood Cancer Research Grant	Chernyakov, Stefanie	Submitted	10/27/2017 2:54:19 PM
Unsubmit	View	90670	test 1	Andrew McDonough B+ Foundation	Childhood Cancer Research Grant	Chernyakov, Stefanie	Submitted	7/5/2017 10:50:03 AM

When you unsubmit the application a notification e-mail is sent to the applicant and any other users listed on the “Enable Other Users to Access this Proposal” with a check in the “Auto Notify” column.

WARNING: **After making changes to the application, you MUST repeat the submission process in order to re-submit your application.**