

proposalCENTRAL<sup>™</sup>

# Prepare and Submit a Proposal.

If you need assistance, contact Customer Service by email at pcsupport@altum.com or by phone at 1-800-875-2562

### **Recommended Software**

proposalCENTRAL Recommends Software for PDF Generators

Many of the grantmakers in proposalCENTRAL request or require that applicants submit their attachments as portable document format (.pdf).

Some of the benefits of using the PDF format are listed below:

1) The files are smaller than a comparable MS Word file with many images.

2) Files in PDF format don't have compatibility problems between versions that files in MS Word or other software formats might have.

3) The file is in a non-revisable format that ensures the person receiving or reviewing the file sees the file exactly as it was submitted.

In order to save your documents as PDFs, you will need to use PDF generator software. The National Endowment for Humanities website (neh.gov) provides a list of PDF generators, available for both PCs and Macs, along with websites that will do the conversion for you. Many are free or very low-cost.

#### Click the link below for a list of available PDF generators:

http://www.neh.gov/grants/grantsgov/pdf.html

# Prepare and Submit a Proposal.

This tutorial will show you how to create and submit your Application.

In this tutorial you will:

- Go to Grant Opportunities and "Apply Now"
- Prepare your Application
- Download and Attach Files
- Validate and Submit your Application

### The proposalCENTRAL Menus

Once you have logged into proposalCENTRAL and completed your professional profile, you will view the main page with 4 menu tabs at the top of page to navigate the main parts of the system. They include:

	Mar	age Proposals	Professional Profile	Institution Profile	Grant Opportunities
<u>All Proposals</u>	Il Proposals In Progress Sub		Awarded	<u>Archived</u>	

- > Manage Proposals
- > Professional Profile
- > Institution Profile
- Grant Opportunities

Under each tab is a blue color coded horizontal bar with menu items available for you to select.

Each of the tabs has different sub menus. The default tab is "Manage Proposals". The default sub menu is "In Progress". Once your proposal has been submitted it will move to the "Submitted" sub menu section.

All Proposals – Lists all proposals from all menus.

- In Progress Lists only proposals that are being worked on and have not been submitted.
- Submitted Lists proposals that have been submitted and their critiques.
- Awarded Lists the results of submitted proposals.
- Archived Lists proposals that have been archived for storage.

# **Creating a Proposal**

You can create a proposal in two ways: the "Create New Proposal" button under the Manage Proposals tab; or, the Grant Opportunities tab.

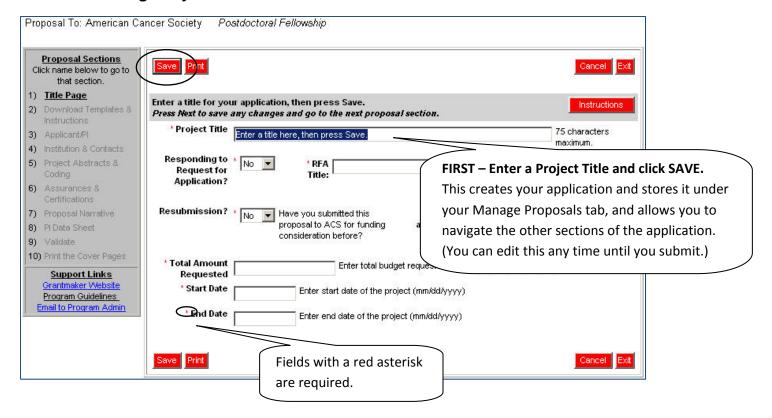
Altum				pro	posalCENTRAL			FAQ    Cur	stomer Ser Doe,	vice    Help    Loqout John
All Proposals In	Progress	Submitted	Awarded	Archived		Manage Proposals	Professional Profile	Institution Profile	Gra	nt Opportunities
Create New Proposal	Click Cr			and start your grant application	(includes letter of intent if req	uired).				s displayed in Eastern Time
Delete Edit Ider	ntifier	Title		Grant Maker			Program	Investigator	Status	Due Date

You can filter the list of grants in the list so that you can see the grants from the foundation you are interested in.

All Opportunities	Click Apply llow to start your application (in	aludae latter o	fintant if raquir	od)				
Total: 44 Opportunities	Show All		st by GrantMaker				<ul> <li>Apply – Click of Now link to created</li> <li>Grant Maker – La foundation web p</li> </ul>	ate a proposal Links to the
Grant Maker	Alliance For Cancer Gene Therapy American Academy of Otolaryngology American Cancer Society	LOI Deadline	Proposal Deadline	Contact Information	Apply		<ul> <li>Programs – Ope the Policies and</li> </ul>	ens a copy of
Alliance For Cancer Gene Therapy	American Lung Association Juvenile Diabetes Research Foundation		2/23/2005 4:00:00 PM	Contacts Document	Apply Now	)	applying (or links maker's website	-
<u>American Academy of</u> <u>Otolaryngology</u>	Paralyzed Veterans of America University of California AIDS Research Program	1/18/2005 11:59:59 PM	1/18/2005 11:59:59 PM	Contacts Document	Apply Now	FAQ	about the progra	im)
<u>American Academy of</u> <u>Otolaryngology</u>	US Immunodeficiency Network		1/18/2005 11:59:59 PM	Contacts Document	Apply Now	<u>FAQ</u>	<ul> <li>Deadlines – The or Proposal mus</li> </ul>	
<u>American Academy of</u> <u>Otolaryngology</u>	AAFPRS Resident Research Grant	1/18/2005 11:59:59 PM	1/18/2005 11:59:59 PM	Contacts Document	Apply Now	FAQ	Contact Information     an email to the a	•
American Academy of Otolaryngology	AAO-HNSF Earleen Elkins Grant	1/18/2005 11:59:59 PM	1/18/2005 11:59:59 PM	Contacts Document	Apply Now	<u>FAQ</u>	<ul> <li>contact for the gr</li> <li>FAQ – Answers</li> </ul>	
<u>American Academy of</u> <u>Otolaryngology</u>	AAO-HNSF Health Services Research Grant	1/18/2005 11:59:59 PM	1/18/2005 11:59:59 PM	Contacts Document	Apply Now	FAQ	questions provid	
American Academy of Otolaryngology	AAO-HNSF Percy Memorial Grant	1/18/2005 11:59:59 PM	1/18/2005 11:59:59 PM	Contacts Document	Apply Now	<u>FAQ</u>	foundations.	
American Academy of Otolaryngology	AAO-HNSF Resident Research Grant	1/18/2005 11:59:59 PM	1/18/2005 11:59:59 PM	Contacts Document	Apply Now	FAQ		

### **Naming your Proposal**

Each grant program may be configured differently, i.e., different data requirements and different application sections. The following examples are intended to illustrate the steps to completing an application. Be sure to click "SAVE" regularly.



# Working with your Proposal

You can "Save" your application at any time.

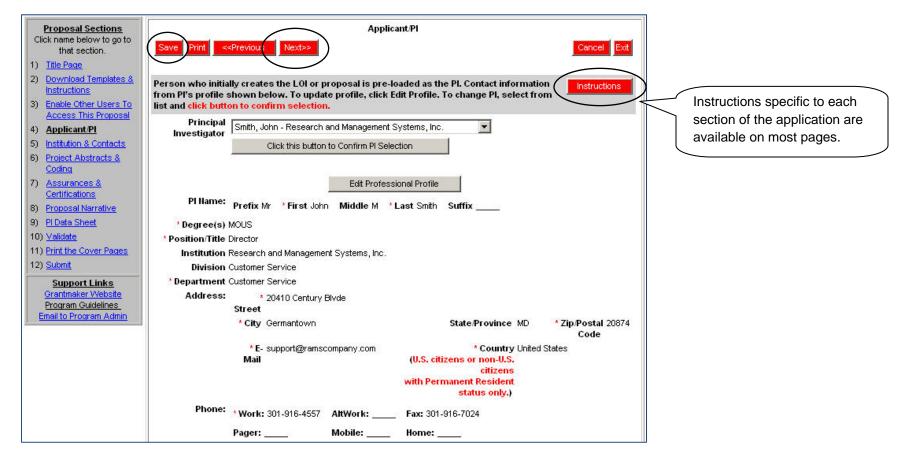
Later, when you log back in, you can find and edit your application from the "Manage Proposals" tab.

Just click on the "Edit" link to open the application that you saved.

Ritum					pro	posalCENTRAL				<u>Faq</u>    <u>C</u>	ustomer Service    <u>Help</u>    <u>Loqout</u> Doe, John
All Proposals	In Progre	<u>ss</u>	Submitted	Awarded	Archived		Manage Proposals	Professional Pr	rofile	stitution Profile	Grant Opportunities
Create New Propos	Create New Proposal Dutton to select a grant program and start your grant application (includes letter of intent if required).										
Delete Edit	Identifier		Title		Grant Maker		Program		Investigator	Status	Due Date
Del Edit	160299	Enter a	title here, then press Save.		Alliance for Lupus Research	Target Identification in Lupus	s (Renewal Proposals Only)		Doe, John	In Progress	7/30/2009 5:00:00 PM

### Working with your Proposal

Click "Next" to go to the next section of the proposal (available at the top and bottom of the screen). Or, go directly to another section by clicking on the link to the section using the menu on the left hand side of the screen.



### **Templates and Instructions**

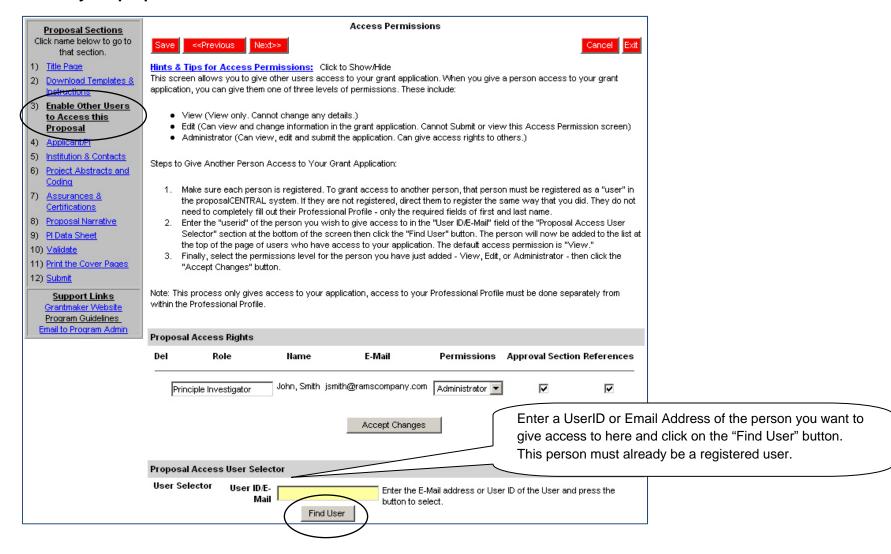
Templates and instructions for their use are provided for you to download. It is recommended that you read the instructions before downloading the templates. You will normally need a PDF reader to read the instructions.

Proposal Sections Click name below to go to	< <previous next="">&gt;</previous>			incel Exit		
that section.	INCLUS					
1) <u>Title Page</u>						
2) <u>Download</u> <u>Templates &amp;</u>	Download Template Type	Description	File Type	File Size		
Instructions Enable Other Users to	Download Proposal Narrative	General Instructions for Using Template/Assembling Application	.PDF	141346		
Access this Proposal	Download Proposal Narrative	Instructions for Proposal Narrative	.PDF	94523		
Applicant/Pl	Download Proposal Narrative	Temp	.DOC	38400		
Institution & Contacts	Download Biosketch	Instructions for Blosker				
Abstract	Download Biosketch	Template for Biosketch	- Do	wnload ea	ach template to a location on your computer.	
Organization Assurances	Download Biosketch	Sample Biosketch	- Yoi	u can com	nplete these and then upload them back into	
Proposal Narrative and	Download Budget & Justification	Instructions for Budget & Justification	the	applicatio	on when you are ready. Please note that	
Other Attachments	Download Budget & Justification	Template for Budget & Justification	most uploaded files will need to be in PDF fo			
PI Data Sheet	Download Facilities & Resources	Instructions for Facilities & Resources		most uploaded mes will need to be in PDF in		
) <u>Validate</u>	Download Facilities & Resources	Template for Facilities & Resources	.DOC	33280		
) Print Signature Page(s)	Download Key Personnel	Instructions for Key Personnel	.PDF	78720		
!) <u>Submit</u>	Download Key Personnel	Template for Key Personnel	.DOC	35840		
Support Links	Download Other Support	Instructions for Other Support	.PDF	69304		
Grantmaker Website	Download Other Support	Template for Other Support	.DOC	33280		
Program Guidelines Email to Program Admin	Download Consultant/Co-Investigator Letters	Instructions for Consultant/Co-Investigator Letters (If Applicable)	.PDF	70078		
	Consultant/Co-Investigator Letters	Template for Consultant/Co-Investigator Letters (If Applicable)	.DOC	32768		
Many of the grantmakers in proposalCENTRAL request or require that applicants submit their attachments as portable document format (pdf). Using PDFs allows you to preserve the formatting of your document. In order to save your documents as PDFs, you will need to use PDF generator software. The National Endowment for Humanities website (neh.gov) provides a sampling of PDF generator software, along with websites that will do the conversion for you. Many are free or very low-cost. Click here for a list of PDF generators.						

The example provided above shows a list of files with their instructions. Some foundations will provide more or less files than in this example. The instructions provide guidelines for each template on how it should be formatted and what restrictions, if any, apply.

### **Enabling Other Users to Access your Proposal**

At times you may want to give access to other people such as collaborators, assistants or grant and contracts staff to your proposal.



### **Enabling Other Users to Access your Proposal**

Now you can assign the level of "access" for this individual. There are 3 levels of permissions: view, edit and administrator. See below for descriptions of each level of permission.

Propos	al Access Rights					
Del	Role	Name	E-Mail	Permissions	Approval Section	References
<u>Del</u> Prir	ncipal Investigator	John, Smith	jsmith@ramscompany.com	Administrator 💌	V	~
<u>Del</u> Adı	ministrator	Tesler, Jerry	jerrytesler@training.org	Administrator 💌		
				View Edit		
			Accept Changes	Administrator		

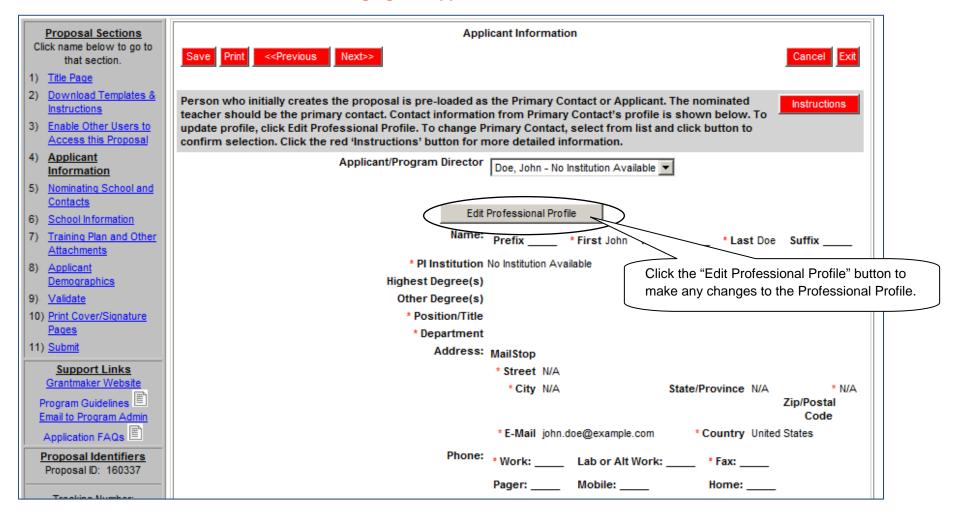
**View** – means that the person can only view the information in the proposal.

Edit – means that the person can view and change the details in the proposal but cannot submit.

Administrator - means that the person can view, edit, and submit the proposal on the applicant's behalf.

Once you have decided which of the access levels to assign to the person you are giving access, click on the "Accept Changes" button.

#### **Changing the Applicant/PI Details**

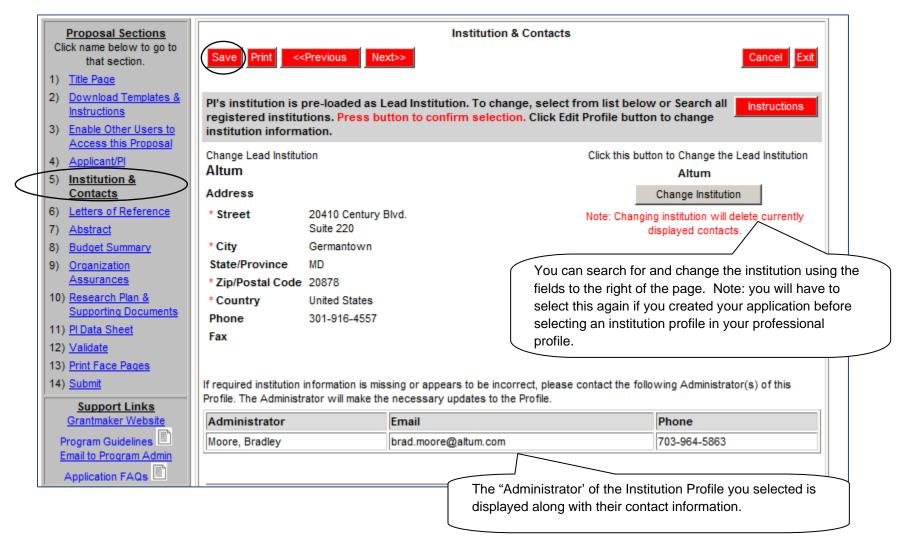


# Changing the Applicant/PI Details

	JOHN, SMITH
<u>Profile Hint</u> :	s & Tips:       Click to Show/Hide         Return to LOI / Proposal       Click on the "Return to LOI/Proposal" link to move back to your application.
Contents of Professional Profile Click folders below to navigate to other parts of the profile	Save Cancel Default Contact Information (ABC Training Institute)
Institution & Add       Contact Info       2) Research Interests       3) Personal Data for	Name: Prefix: First: Smith Middle: Aast: John Suffix:
Applications     Add     BioSketch Add     S) Change password or     account information	Search and Select Institution Search
6) Enable others to access your profile	Select ABC Training Institute Create new Institution Degrees: MOUS
	Title: Director Division:
	Department: Research

# **Entering your Institution Details**

The top section of the Institution and Contacts page will populate based on the information setup in your Institution Profile.

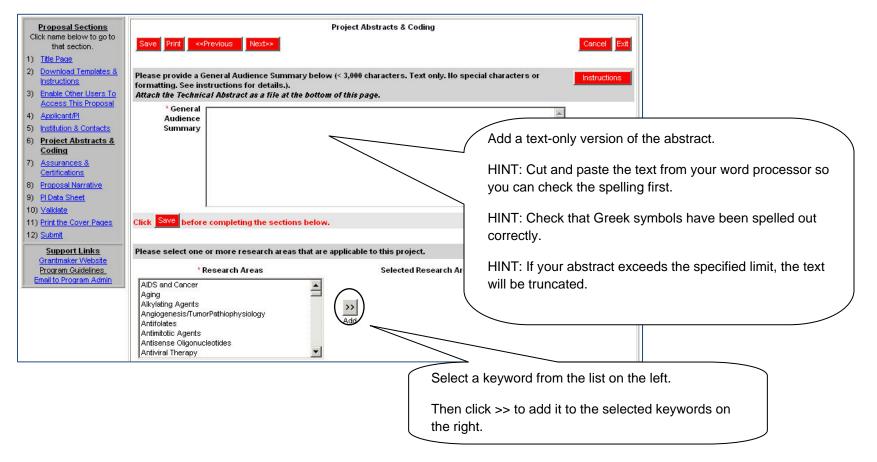


# Working with Contacts

*Signing Official	Select from list of Institution Officials         Enter email address    Institution contacts names from the Institution Profile will display in the drop-down list for each row in the 'Contacts table."
Signing Official	Confirm email address  Confirm email address  Confirm email address  Confirm email address  Details may appear differently dependent upon various proposal requirements. Use the drop down arrow next to the "Signing Official" to select from the list. Once the Official is colort we will click on the red "Add" button to the right of the
	Select from list of Institution Officials OR selected official.
*0	Enter email address
*Sponsor	Confirm email address
$\sim$	Add

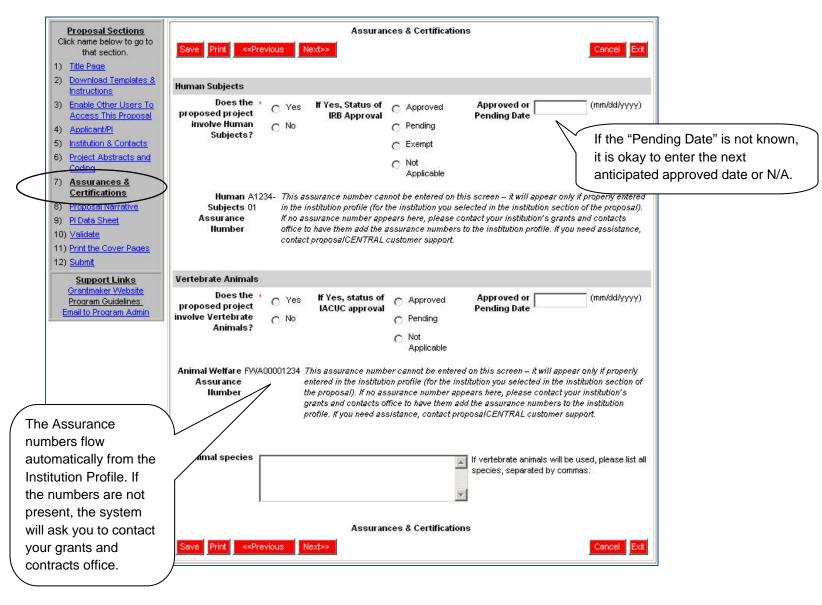
Note that the entry can be edited or removed.

### Working with Abstracts and Keywords



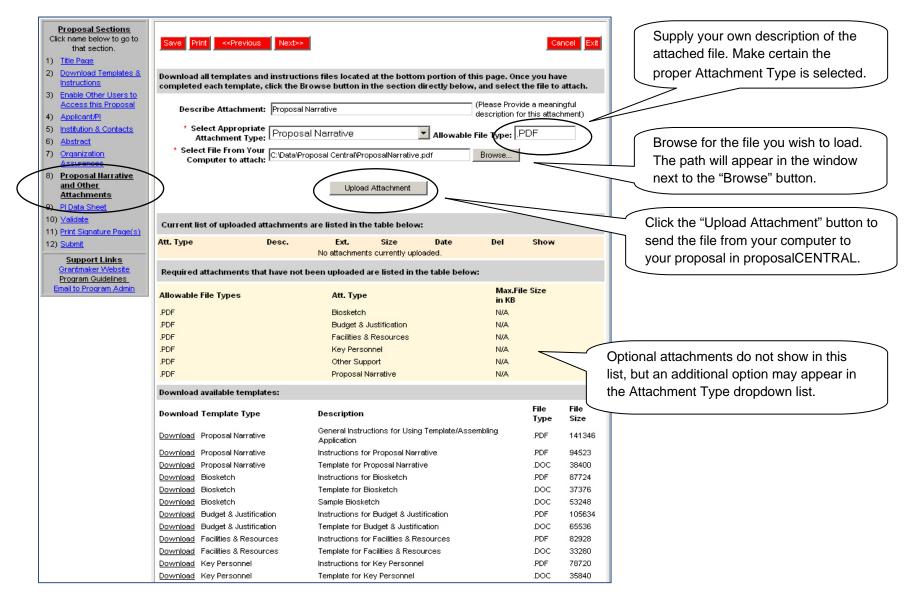
# Working with Abstracts and Keywords

Please select one or more priority areas that relative emphasis of the project for all select	are applicable to this project.Then provide a % weighting i ed priority areas.	ndicating the Instructions	
* Prio	ity Areas	Selected % of	
2.4-Resources and Infrastructure Related to Etiolo 3.1-Interventions to Prevent Cancer: Personal Beh 3.2-Nutritional Science in Cancer Prevention 3.3-Chemoprevention	hisms with Exogenous and/or Endogenous Factors	Priority Project Areas Del 1.1-Cancer 100 Related Biology TOTAL 100 Save Weighting	The % of project of the areas must total 100%. Click on the "Save Weighting" button to recalculate the total %.
Organ Sites	Selected Organ Sites % of Project		
Adrenal Anus Bladder Brain Breast You can remove selected	Blood 50 Bone 25 Bone marrow 25 TOTAL 100		
items by clicking on the "Del" link for the item.	Save Weighting		



### **Assurances and Certifications**

#### **Uploading the Completed Templates**



# **Uploading Attachments**

### As with the abstract, a note appears at the top of the screen to let you know that the file was loaded successfully.

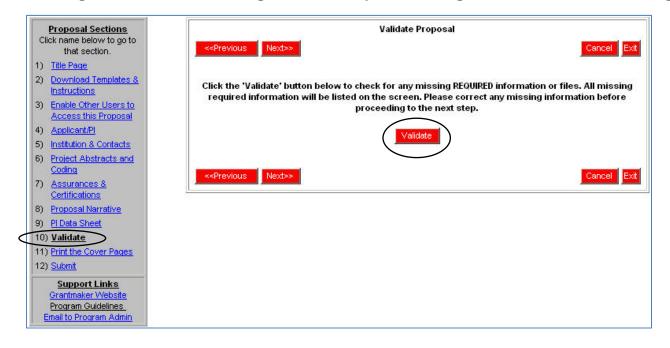
mple we are Proposal The file moves iddle portion of Attachments" to the file was ly loaded. Process for the oleted template tually all the files on 3 will be section 2.

# Working with the PI Data Sheet

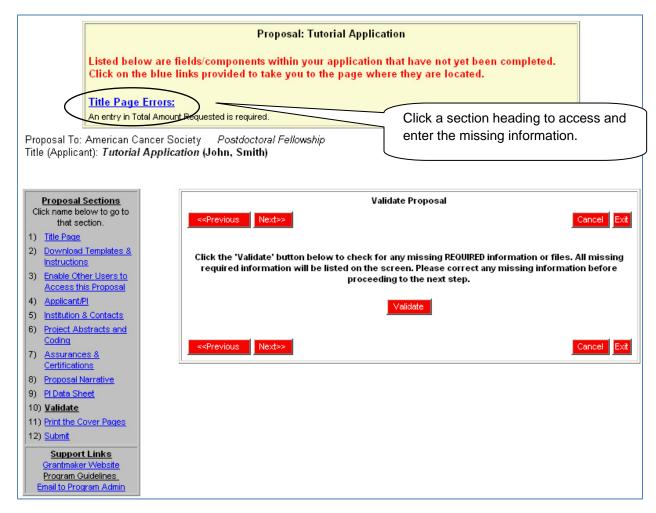
The PI Data Sheet is a special section of the application for sensitive information about the PI that won't be shown to reviewers. This information is for internal use by the grant-maker.

Proposal Sections Click name below to go to	Save Print < <previous next="">&gt; Cano</previous>	el Exit
that section.	PI Demographics and private information	
1) <u>Title Page</u> 2) <u>Download Templates &amp;</u> Instructions	Edit Professional Profile	Most of the information in the PI Data Sheet is copied from the Professional
3) Enable Other Users to Access this Proposal	Birth Info: DOB City County State Country	Profile.
Applicant/Pl     Institution & Contacts     Desired All All All All All All All All All Al	12/12/1954 Germantown Montgomery MD United States	The "Edit Professional Profile" button is available to edit the details in your
6) <u>Project Abstracts and</u> <u>Coding</u> 7) <u>Assurances &amp;</u> Certifications	City         Zip/Postal Code         County         State         Country           Germantown         20874         Montgomery         MD         United States	Professional Profile, if necessary. The click the 'Return to LOI/Proposal' button
8) <u>Proposal Narrative</u> 9) <u>PI Data Sheet</u>	Gender: Male	to return to the proposal.
10) <u>Validate</u> 11) <u>Print the Cover Pages</u> 12) <u>Submit</u>	Race: Not Provided	
Support Links Grantmaker Website Program Guidelines Email to Program Admin	Citizenship * Status Not Provided (U.S. citizens or non-U.S. citizens with Permanent Resident status only.)	Some fields that contain private or sensitive information have the option of being left as "Not Provided".
	* SSN N/A If your country does not have a Social Security Number, leave	
	the field entry with "N/A".	

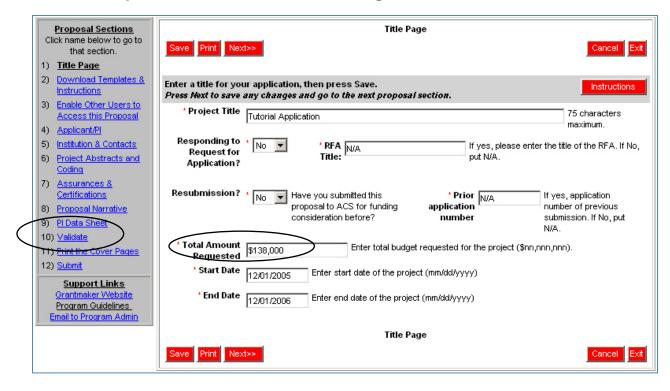
The Validate section checks if all of the required fields are completed and all of the required files are uploaded. Clicking the "Validate" button generates a report showing that information is missing.



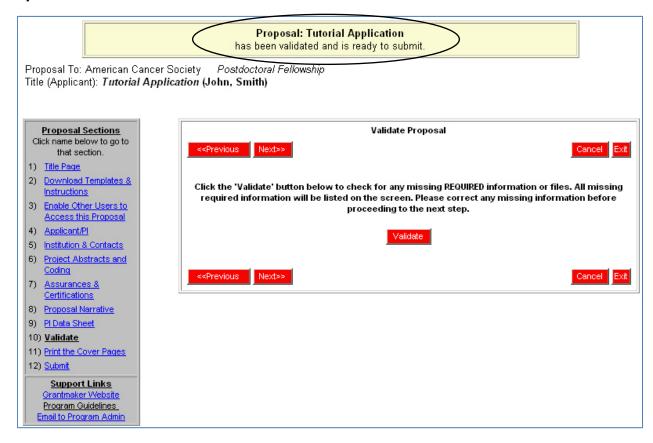
As an example, the "Total amount requested" in the Title Page, a required field, was left blank on purpose.



#### Enter the required data and click "Validate" again.

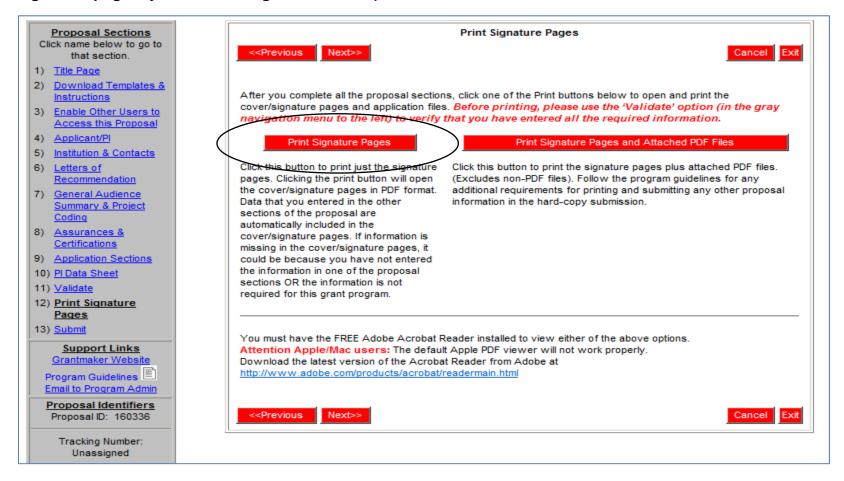


The proposal is now ready to submit. Entries are present for all required fields and all required files have been uploaded.



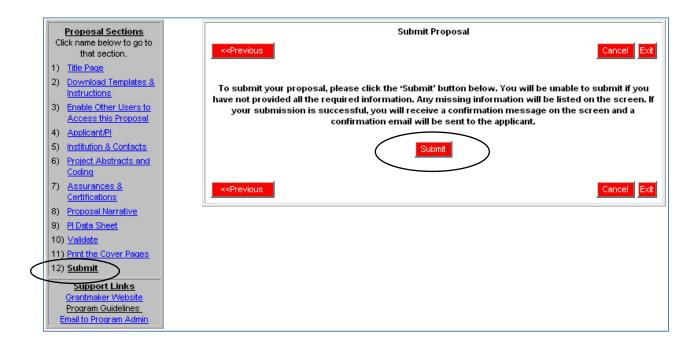
### **Printing the Cover/Signature Pages**

Once you have completed all the proposal sections and validated the required data, you can print the signature page for your proposal. Refer to the program guidelines for the appropriate procedures. (Note: You can print the signature page if you are missing attachments.)



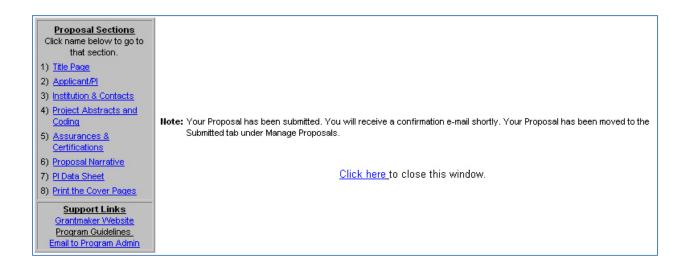
### Submitting your Proposal

Now that everything has been completed, you will need to submit your application. Click on the submit link number 12, and then the submit button. You will get an email with a confirmation of the submission.



# **Submitting your Proposal**

Once you have submitted you proposal a confirmation message will appear.



# Congratulations on submitting a proposal using proposalCENTRAL!!

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