

### **ORCID Global Participation Fund**

## **ProposalCentral Application Submission Instructions**

# **PROPOSAL APPLICATION PROCESS (via ProposalCentral)**

Please complete and/or review for accuracy the following sections. Submissions that do not meet the requirements will not be considered.

## **Starting a New Proposal Application**

To start an application, go to <u>https://proposalcentral.com/</u> and login with your credentials or click the "Need an account?" link to create an account. Once you log into the system,

- 1. Click Grant Opportunities.
- 2. Search for ORCID to find the Global Participation Fund.
- 3. Click the "Apply Now" button to begin the proposal application.



## **Returning to In-progress Proposal Applications**

At any time, you may click the "Save" button on the page to save your in-progress work. To return to the saved proposal, login with your credentials that you used to start the proposal. If necessary, click on the

"Home" tab to see a list of your proposals. Click on the link in the "Identifier" column for your proposal to open the application and continue working on it.

	Home	,	Proposals	Awards	Profess	sional Profile	Institution Profile	Grant
Create New Proposal								
6 Proposals Due								
Show 10 v entries								
Identifier / Tantle						Grant Maker	Program	Ļt
141665 My Program						ORCID	ORCID Global Particij Fund	pation

## **The Proposal Application Sections**

The application has seven (7) sections for you to complete:

- 1. Proposal Title and Amount
- 2. Proposal Access Rights
- 3. Organization/Institution & Contacts (begin this section as early as feasible)
- 4. Principal Investigator
- 5. Proposal Narrative
- 6. Attachments
- 7. Attestation
- 8. Validate

#### **Section 1: Proposal Title and Amount**

To establish your application, you must complete and save the required fields in this section. You will not be able to navigate to any of the other sections until your application is established.

1. Review the information about the grant program to ensure that your project is eligible. In particular, review the "About the Grant Programs" section. Proposals for projects that do not address grant objectives will not be considered.

* Project Title	* Project Title My Project							
	Please provide a short name for your proposed project							
* Grant Program	<ul> <li>Grants for Community Development and Outreach</li> <li>Grants for Technical Integration</li> </ul>							
* How much	\$10,000,00							
funding are you requesting?	Please add total request amount in USD, not to exceed \$20,000							
Funding Request Notes (if applicable)	Type up to 200 characters							
	0 out of 200 characters							
	You will be requested to upload a budget document where you will explain your budget in more detail.							
Privacy Po We will only use : Global Participati information.	Dicy Acknowledgement your personal information to administer your grant application and communicate with you regarding the on Fund. You can unsubscribe at any time by contacting <u>grants@orcid.org</u> . See our <u>Privacy Policy</u> for more							
* Privacy Policy Acknowledgement	● I have read and acknowledge ORCID's Privacy Policy							

- 2. Enter your project title and click the Save button on the bottom of the page to establish your application. This action will open the rest of the application for editing.
- 3. Enter the other information in this section:
  - **Grant Program**: the program to which you are applying. Please carefully review the program objectives in the "Amount the Grant Programs" section to ensure that your project will be considered.
  - **Funding Requested:** enter how much funding you are seeking. This amount should not exceed \$20,000 USD, the maximum size of allowed for these grants. A detailed budget will be requested in the "Attachments" section of the application.
  - **Funding Request Notes**: Use this optional field to provide additional context about your funding request amount, if applicable.
- 4. Read the Privacy Policy Acknowledgement and accept before continuing.



5. Click the "Next>>" button to move to the next page. If the "Next>>" button is not visible, click the "Save" button first to reveal the "Next>>" button.

TIP: Any question with a red asterisk is a required field. If any fields with the red asterisk are not completed, you will get a validation error at the top of the page when you Save. You can move to other sections of the application, but you will not be able to submit until all validation errors are corrected.

#### Section 2: Enable Other Users to Access this Proposal (OPTIONAL)

In this optional section, you may invite others on your team to view and edit the grant application. Use this section to grant access to your proposal to any other users in the system. The people that you invite must already have a ProposalCentral account. (They may create an account by navigating to <a href="https://proposalcentral.com/">https://proposalcentral.com/</a> and clicking the "Need an account?" link.)

Proposal A	Access Rights			Adjust the us	ser's	
Auto Notify	Role	Name	Email	permissions	Permissions	Delete
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Save						
Give User	r Proposal Access	Find the	e exist	ing user		
User ID/	Email					••••]
	Enter the Email a so of Find User	r User ID of a registere	ed ProposalCer	ntral User and press the button to	e select.	

- 1. If you decide to enable other users, enter the person's email address or ProposalCentral User ID and click the "Find User" button to add the person to the "Proposal Access Rights" list.
- 2. You may adjust the type of access person that the person has from the "Proposal Access Rights" list by changing the value in the "Permissions" column on the row for the person. There are three possible choices for this value:
  - "Administrator" level permissions allow them full control of the proposal.
  - "Edit" level permissions allow them to edit the proposal, but not delete it.
  - "View" level permissions allow them to view the proposal but not make any changes.
- 3. Click the "Next>>" button at the top or bottom of the page to save your changes and navigate to the section of the proposal.

#### Section 3: Organization/Institution & Contacts

**IMPORTANT**: Please complete this section as early as feasible. Organizations/institutions that are not yet in ProposalCentral must be approved before you will be able to submit your application. You will be able to continue working on your application while you are waiting for this approval.

In this section you will include information about the organization/institution that is applying for the grant. Grants may only be awarded to non-profit organizations, NGOs, or government entities and do not need to be a current ORCID member. (Please refer to <u>the FAQ</u> for additional information.)

Organization/institution information comes from the institutional profile in ProposalCentral's database. If your institution is not yet in the database, you will provide this information and it will need to be approved by

ProposalCentral to be include in the database.

- 1. Search to see if the institution is in the database.
  - Click the "Change Institution" button to display the Institution Profile search form.

Home	Proposals	Awards	Professional Profile	Institution Profile	Grant Opportunities	Funding Resources 🏈
Ins	titution Name (partial):	My insituti A maximum	ion of 100 results will be returne	d based on the search text.		
In	stitution City: titution State:	Enter entire of Select Sta	te			~
Institu	tion Country:	Select Co	untry			~
		Display Re	esults Reset Filter C	ancel		

- Request a new Institution Profile
- Enter information into the institution profile search form to identify if your institution is listed in the database. You may enter partial information, for example only a portion of the institution name, or you might omit the institution city in the form.
- Click the "Display Results" button to display a list of institutions from the database that match your criteria.

Show 25 v entrie Showing 1 to 25 of 2	s Select your institution	Refine results	
Select	Institution Name	Institution Status	\$
•	Institution for Cancer	Unconfirmed	

- If you see your institution in the list, click the circle next to the institution name to select it, and click the "Select" button at the bottom of the page to add this institution to your application. Continue to step #2 of these instructions for Section 3: Organization/Institution & Contacts.
- You may further refine your results by searching within the results list. To do so, type values into the "Search" box at the top of the results list table.
- If you do not see your institution, in the list, review the following before creating a new institution:
  - **100 or more entries?** Note how many entries are listed in your search results by looking at the text at the top left above the results table. If the number of entries is greater than or equal to 100 (for example "Showing 1 to 25 of 100 entries"), you should add more information to the institution profile search form and redisplay the results by clicking the "Display Results" button. A maximum of 100 results will be returned by the system, so if 100 are found, it is possible that your institution is in the database, but not within the first 100 returned during the search.
  - Information that is too specific? If you have entered a lot of information into the institution profile search form, it is possible that your institution is in the database with information similar to, but not exactly what you have typed. Try again with less information, perhaps omitting the Institution

City, or only using the most unique words in the institution name.

- If you still do not see your institution, click the "Request a new Institution Profile" button at the bottom of the page to display a form to add your institution. Fill out this form and click the "Save" button at the bottom of the page. The following fields are required for ORCID grant applications:
  - Institution Legal Name
  - Authorized Institution Representative: this is the person that may change information in the Institution Profile. You must include a name, position/title, and email address.
  - Institution Address: please include the full mailing address for the institution.
  - **Organization Tax ID**: the government tax ID for your institution. This number should be registered to the institution legal name from earlier in the form.
  - Make Checks Payable To: the name that should appear on a check for grant payments.
- If any information is missing or incorrect of if you cannot find your institution, contact the PC Support Team at pcsupport@altum.com or 800-875-2562 (Monday-Friday 8:30 a.m.- 5:00 p.m. Eastern Time).
- 2. Additional organization information.
  - If necessary, return to your grant application by clicking on the "Proposals" tab, and then clicking on the "Edit" button for the application that you have been working on to display the in-progress application.

			Home	Proposals	Awards	Professional Profile	Institution Profile	Grant Opportunities	Funding I	Resources 🌾
Create New Proposal								Dead U	Deadlines displayed in U.S. Eastern Time	
Show 25 v ent	Show 25 v entries Proposal Status: All v Search:									
Delete	Edit	Identifier 💙	Title					\$	Grant Maker <sup>♦</sup>	Program 🗳
Delete	Edit	141665	My Progra	ım					ORCID	ORCID Global Participation Fund

In the "Proposal Sections" on the left side of your application, click on the "Organization/Institution & Contacts" section to complete this section.

- In addition to connecting the profile for the proposing organization to the application, you will need to supply the following information:
  - Institution Website: Please provide the website address for the proposing institution.
  - Organization Identifier and Type: Please help us identify the proposing organization by providing an organization identifier. We are flexible about the identifier that you provide; examples include a national organization ID, a ROR ID, an LEI, or even a social media profile. For these fields you will include the identifier and tell us what type of identifier you have provided.
  - **Signing Official**: in the event that you are awarded a grant based on your proposal, we will reach out to the person who is authorized to sign an agreement on behalf of the institution. Please

include the name, professional title, and email address for this person.

3. Click the "Next>>" button at the top or bottom of the page to save your changes and navigate to the section of the proposal.

#### **Section 4: Principal Investigator**

In this section you will confirm information about you as the Principal Investigator for this proposal. The information you populated in the Professional Profile (and/or used to create an account) will automatically populate here. The only information required about you is your name and email address; other information included in your Professional Profile will not be considered as part of your ORCID GPF grant application.

**If needed,** update your Professional Profile by clicking the blue "Edit Professional Profile" button to open your profile. If you need to correct your Name or Email address, click the blue "Edit Account Information" button to update.

Click the "Next>>" button at the top or bottom of the page to save your changes and navigate to the section of the proposal.

#### **Section 5: Narrative**

The narrative section contains the information that will be used when evaluating your proposal. We invite you to review the <u>GPF Grant Program FAQ</u> for additional information.

Complete each question in this section. A red asterisk denotes that the answer is required to validate and submit your application. The character limits listed will include the spaces that you use.

Click the "Next>>" button at the top or bottom of the page to save your changes and navigate to the section of the proposal.

#### **Section 6: Attachments**

You may submit attachments with your application to support and/or explain your proposal. You must attach a copy of your proposal budget as an attachment. Click the blue "Attach Files" button to attach the required Budget and the optional Supporting Materials documents.

Click the "Next>>" button at the top or bottom of the page to save your changes and navigate to the section of the proposal.

#### **Section 7: Attestation**

In this section you will read and confirm the attestation statement. Review the attestation and click Confirm.

Click the "Next>>" button at the top or bottom of the page to save your changes and navigate to the section of the proposal.

#### **Section 8: Validate**

In this section you will perform a validation to ensure that nothing is missing from your proposal application. By clicking the "Validate" button on this page, the system will check your application for any missing or incomplete information. Anything that is missing will be listed at the top of this page after the validation. You may navigate to the sections that need attention by clicking on the section names in this list or clicking on the names in the "Proposal Sections" area on the left side of the page.

When your proposal passes the validation (e.g., no errors or omissions are listed after you validate), click the "Next>>" button at the top or bottom of the page to save your changes and navigate to the section of the proposal.

#### **Section 9: Print Application**

On this page, you will be able to print a PDF of your application by clicking the blue "Print Application" button.

#### Section 10: Submit

The Submit section is the final step of the proposal application process. Do not forget to review your application before you click the "Submit" button.

## **GETTING HELP**

#### **Technical Issues**

ProposalCentral's support team can be reached at <u>pcsupport@altum.com</u> or 800-875-2562 (Monday-Friday 8:30 a.m.- 5:00 p.m. Eastern Time).