



Contact Definitions:

Principal Investigator (PI)/ Director: Individuals with full access to their application, award, deliverables, and payments. Only the Principal Investigator can add individuals (contacts) to the application/award and is the only one with the ability to grant Budget Access to other members of the team (contacts). The Principal Investigator must approve the Estimated Budget and the Report of Expenditures deliverables prior to submission. The Principal Investigator is responsible for their application and funded award, through the management of contracts, deliverables, and payment information.

Authorized Institutional Official (AIO): Individual with read-only access to the full application and award, and is required to electronically approval all applications, award letters and annual progress reports through the Adobe Sign process. The Adobe Sign process is completed through their associated email address, not in the Grants Management System. Individual responsible for the oversight of all awards issued to their institution. Only the AIO has the authority to legally obligate the institution to the terms and conditions of award and person to whom the application and award letter will be submitted for signature.

Financial Officer: Individual with access to review and edit all financial documents associated with the application and award; and is required to sign all Post-award financial documents (Estimated Budget and Report of Expenditures) in the system prior to submission to CFF. The Financial Officer is not required to sign off the application budget.

Pre-award Contact: Individual with full access to the application and supporting documents, with the exception of the budget. The PI must provide permission online by granting Budget Access for the Pre-Award Contact to access and work on the budget.

Post-award Contact: Individual with full access to the award, deliverables, and payment information. The PI must provide permission online by granting Budget Access for the Post-Award Contact to access and work on the Estimated Budget and Report of Expenditures.

Grants Officer: Individual with full access to the application and supporting documents, award, deliverables, and payment information. The PI must provide permission online by granting Budget Access for the Grants Officer to access and work on the Estimated Budget and Report of Expenditures.

Administrative Contact: Individual with full access to the award, deliverables, and payment information. The PI must provide permission online by granting Budget Access for the Grants Officer to access and work on the Estimated Budget and Report of Expenditures.



Coordinator: Individual with full access to the award, deliverables, and payment information. The PI must provide permission online by granting Budget Access for the Coordinator to access and work on the Estimated Budget and Report of Expenditures.

Mentor: Individual with access to review the full application of a Fellow but cannot submit the application on their behalf. The Mentor does not have access to the funded award.

Co-Investigator/ Co-Director: Individuals who do not have access to the application but is considered in review for conflicts of interest. The Co-Investigator/ Co-Director has full access to the award, deliverables, and payment information. The PI must provide permission online by granting Budget Access for the Co-Investigator to access and work on the Estimated Budget and the Report of Expenditures.

Collaborator: Individual who collaborates with the PI and has effort on the project but is not associated with the project institution. The Collaborator does not have access to the funded award.

Subcontractor: Individual who approves the subcontractor budget for the application. The Subcontractor does not have access to the application or award. The Subcontractor approves of the application budget through the External Requests tab.

Community Representative: Individual who is part of the CF Community and may serve on review committees.

Reviewer: Individual who serves on a review committee and provides scores of applications.



How to Manage Contacts Associated with your Institution (Authorized Institution Official):

1. As the Authorized Institution Official of your Institution, you may manage your contacts associated with your Institution under the Institution Contacts tab. Here you will find your Active Institution Contacts and Inactive Institution Contacts:

Active Institution Contacts: Displays contacts that are associated with your Institution that currently have access to the CF Grants Management System. You may add or remove roles to current active contacts or request access removal under this module.

Institution Contacts

17 Active Institution Contacts

3 Inactive Institution Contacts

Inactive Institution Contacts: Displays historical contacts that were associated with your Institution that do not have log in access to the CF Grants Management System.

2. To add or remove roles to an existing contact, select the Active Institution Contacts module and select the contact:

Active Institution Contacts

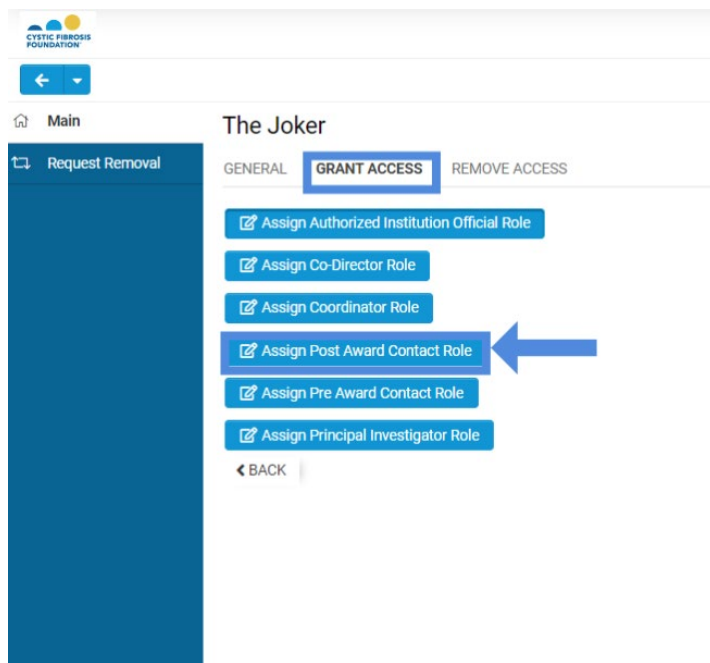
The **Active Institution Contacts** module displays all contacts associated with your Institution that have access to the CFF Grants Management System (GMS). Here you may review all contacts with existing access, edit contact roles, or request to remove the contact's access from the CFF Grants Management System (GMS) if the contact has left your Institution. To find all contact role definitions and permissions, please review the GMS Contact Definition guide here: [Contact_Definitions.pdf \(cff.org\)](#)

#	Full Name	Title	Institution	Email	Phone	Roles
1	The Joker	Coordinator	CFF Hospital Foundation		5555555555	Administrative Contact, External User, Financial Officer, Grants Officer
2			CFF Hospital Foundation		5555555555	External User, Financial Officer, Grants Officer
3			CFF Hospital Foundation		5555555555	External User, Financial Officer, Grants Officer



3. **Adding Roles:** To add roles to an existing contact, select the GRANT ACCESS tab and select the role you would like to assign to the existing contact. Once the role is selected, select OK on the pop-up window to add the requested role to the contact profile. The role will now be assigned as part of the contact profile and the contact will now appear as an available contact to add to any Application or Award Record under the assigned role.

Please Note: You will still be required to add to the contact to the Application or Award Record under their assigned role for the contact to be able to view the Application or Award Record.



The contact profile will be updated to the Post Award Contact role.
Select Yes to save the Post Award Contact role to the contact profile.





4. **Removing Roles:** To remove roles to an existing contact, select the REMOVE ACCESS tab and select the role you would like to remove from the existing contact. Once the role is selected, select OK on the pop-up window to remove the requested role from the contact profile. The role will now be removed as part of the contact profile and the contact **will not** appear as an available contact to add to any Application or Award Record under the removed role.

A screenshot of a web application interface. At the top left is the Cystic Fibrosis Foundation logo. Below it is a navigation bar with a home icon and the word "Main". A sidebar on the left contains a "Request Removal" button. The main content area is titled "The Joker" and has three tabs: "GENERAL", "GRANT ACCESS", and "REMOVE ACCESS" (which is highlighted with a blue box). Under the "REMOVE ACCESS" tab, there are three blue buttons: "Remove Administrative Contact Role", "Remove Financial Officer Role" (which is highlighted with a blue box and a blue arrow pointing to it from the right), and "Remove Grants Officer Role". Below these buttons is a "< BACK" button.

The contact profile will be updated to remove the Financial Officer role. Select Yes to remove the Financial Officer role to the contact profile.

OK Cancel

- 5. Request Removal:** You may request removal of access for all existing contacts associated with your Institution by selecting the Request Removal tab. You must enter in a reason for the removal request by selecting the + sign (New Removal Request) and entering in a reason for the request to remove the contacts access to the CF Grants Management System. Once the Removal Reason is entered, select the Submit button. The request will be sent to the Grants and Contacts Management and Administration (GCMA) Department for review. When approved, an email will be sent to you and the contact notifying you both that the contact no longer has access to log into the CF Grants Management System.

