



Pivot Quick Start Guide

Create your account (Use your WU email address; it is your user ID to access the PIVOT database):

- Visit <https://pivot.cos.com/register>
- Enter information and select "Create my account".
- Select "Create my account".

Claim your profile:

- Select the dropdown menu next to your name to reveal the menu and select "Claim Profile"/
- Pivot will populate a list of suggested profiles based on your credentials. Select the appropriate profile. If no names are found, Pivot will prompt you to create a profile.

***Tip:** You do not need a profile to search for funding; however, claiming your profile initiates the "Advisor" functionality that will curate funding opportunities based on your profile and research interests in a weekly email. You can disable this and other alerts in your profile preferences. Access Advisor results from the home page (house icon).

Search for funding by keyword:

- Select the "Funding" tab.
- Enter a term or keyword in the simple search field, or select "Advanced Search" to enter additional criteria.
- In Advanced Search, select "Match All" or "Match Any" and enter the terms in the search fields, using Boolean, Truncation, Proximity, and Precedence operators to refine the search.
- Refine your results by utilizing the faceted search criteria on the results page or by selecting "Refine Search".

***Tip:** To use the keyword section of Advanced Search, begin by typing a term in the search field and selecting a keyword from the choices that pop up. Click on "browse" to launch the keyword tree/hierarchy, then navigate the arrows to expand a particular subject area to reveal narrower terms. Use the "Explode" function with the keyword search to trigger the system to search for the more specific terms under it in the keyword hierarchy.

Search for funding by sponsor:

- Select the "Funding" tab, then select the "Search by Sponsor" option.
- Enter the name in the search field or select from the following lists: All sponsors, U.S. Federal, Non-U.S. Federal.

***Tip:** Sponsors are organized by agency. For example, the National Institute of Justice will be listed under the United States Department of Justice, as it is a department within the agency.

Save a search:

- From the search results page, select "Save Search".
- Enter a name for your search and select the preference on email notification.
- Access/edit saved searches from the home page to view archived results and modify email alerts.

Monitor funding opportunities—Track, Active, Share, Export:

- Select the appropriate option from the individual funding opportunity or by selecting the funding opportunity check box on the search results page.
- Access and modify Tracked, Active, Shared, and Received funding opportunities from the home page (house icon).
- **Track:** List of funding opportunities you want to monitor, but may not be actively pursuing.
- **Active:** Funding opportunities you are actively pursuing.
- **Share:** Send the funding opportunity to a colleague. You can receive a copy of the shared opportunity.
- **Export:** Save the funding opportunity to your computer in a separate file (HTML, Excel, or other). You can export the full record, standard fields, or select the fields to export.

Pre Award Procedures: Reminders

Intent to Submit a Proposal

Once you identify a funding opportunity to pursue, please submit to the Office of Sponsored Projects an *Intent to Submit a Proposal* form. This will serve as advance notice that a proposal is in development which will reserve the OSP resources that are necessary for sufficient discussion and deliberation to review each unique proposal for accuracy, compliance, and propriety before timely submission to the sponsoring agency. This form is requested when the PI starts initial work on a grant proposal or at least 30 days before the proposal deadline, whichever is earlier. This form is available here: <http://www.washburn.edu/faculty-staff/sponsored-projects/forms-applications.html>.

Internal Approval

The Internal Approval form is used to record required University approvals and to route grant and contract proposals through the University's submission process. The Internal Approval is due to OSP 14 calendar days prior to the agency due date for the funding opportunity. When submitting your form, please include:

1. Complete copy of the prepared grant proposal
2. Complete copy of the RFP or grant submission guidelines
3. Proposed project budget with budget justification
4. Position description(s) for grant funded personnel
5. Statement of work and budget for subrecipients
6. Other supporting documents required by the RFP or grant application guidelines

This form and instructions are available here: <http://www.washburn.edu/faculty-staff/sponsored-projects/forms-applications.html>.

Submission

All applications, proposals, and contracts for external funding of projects are made on behalf of the university and shall be submitted by the Office of Sponsored Projects in the name of Washburn University of Topeka. The aforementioned procedures help to ensure the Office of Sponsored Projects has sufficient time for submission of proposals through electronic research administration portals.

Questions? Contact OSP!

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