

## Career Awards at the Scientific Interface

### Applicant Instructions for Requesting Confidential Letters

The Career Awards at the Scientific Interface (CASI) program requires confidential recommendation letters for both stages of the application process – (1) the preproposal stage and (2) the invited full application stage. These letters must remain confidential, and therefore, must be uploaded to your application by the letter writer.

For the **CASI preproposal application** one confidential recommendation letter is required – from your primary postdoctoral mentor. **No more than one** confidential recommendation letter may be provided as part of your preproposal application.

For the **CASI invited full application**, two confidential recommendation letters are required – (1) a letter from your graduate advisor and (2) a letter from a recommender who knows your work well. A third confidential recommendation letter may also be uploaded to your application by the letter writer, but is not required. **No more than three** confidential recommendation letters may be provided as part of your full application.

Confidential letters **MUST** be requested by the applicant by using the send email function on the “Recommenders” page of the CASI application (whether the preproposal or full application). Log in to BWF’s grant application system and proceed to the “Recommenders” page (see Figure 1 below), then follow the steps below to request one or more confidential letters.

For the **CASI preproposal application**:

1. Enter the name of your primary postdoctoral mentor in the field in the “Name” column.
2. Enter the email address of this individual in the appropriate field in the “Email Address” column.
3. Check or uncheck the “Send Email” box accordingly. *It is highly recommended that you notify your primary postdoctoral mentor to expect the email.*
4. Click the **Send** button.

For the **CASI full application**:

1. Enter the name of your graduate advisor and at least one recommender in the fields in the “Name” column.
2. Enter the email address of these individuals in the appropriate fields in the “Email Address” column.
3. Individual or group email requests may be sent. Check or uncheck the “Send Email” box accordingly. *It is highly recommended that you notify your graduate advisor and the recommender(s) to expect the email.*
  - a. To send an individual request, remove the check from the “Send Email” boxes as appropriate.
  - b. To send a group request, check all “Send Email” boxes.

**NOTE:** *If more than one “Send Email” box is checked, the same email will be sent to all people.*

4. Click the **Send** button.

**Figure 1: Recommenders Page**

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### Recommenders

button to email each of your recommenders a link for uploading the requested letter of recommendation to your application. Mark the 'Send email' checkbox for each recommender to expect the email. Once the letter has been uploaded, the document will be listed on the Attachments page. The number in parentheses (s) indicates the minimum number of letters required. You will be able to submit the application after the required number of letters is received. If you need to change any of your recommenders, you must (1) remove the original recommender, (2) add a new recommender, (3) mark the send email checkbox, and (4) click the send button to email the new recommender a link for uploading the requested letter of recommendation to your application.

Name	E-mail Address	Send email	Remove
* Jean Kramarik	<a href="mailto:jkramarik@bwfund.org">jkramarik@bwfund.org</a>	<input checked="" type="checkbox"/>	<input type="button" value="Remove"/>
* Debra Holmes	<a href="mailto:dholmes@bwfund.org">dholmes@bwfund.org</a>	<input checked="" type="checkbox"/>	<input type="button" value="Remove"/>
<input type="text"/>	<input type="text"/>	<input checked="" type="checkbox"/>	<input type="button" value="Remove"/>

**Step 1:** Enter the name(s) of the recommender(s) in this column.

**Step 2:** Enter valid email addresses for each recommender in this column. Be sure the email address corresponds with the appropriate name.

**Step 3:** Confirm the 'Send Email' box is checked for each person you wish to receive an email.

**Step 4:** Click the Send button

A standard notification email template will appear (see Figure 2). Note that the email will be sent from the applicant's email address used to log in to the BWF grant application system.

**IMPORTANT:** If you do not receive the notification email template screen at this stage, an email will not be generated.

The email you send will contain a web link (url) generated by the system which the recommender **MUST** use to log in to the system and upload the requested letter. The link is specific to your application and the designated letter writer. Continue with these steps to send the email requesting a confidential letter:

5. Change the text of the subject line, if you wish.
6. You may change the text of the message that will be sent to each recommender, if you wish. *It will be helpful to add the instructions below to the text of the email. Please keep in mind that the message cannot exceed 5,000 characters.*

You should be able to see that the file has been successfully uploaded near the top of the screen. Once the letter is uploaded, click the Finished button. If you have issues using the link in this email, please copy and paste the entire url into your web browser. Also, please verify you are using the correct email address to log into the site.

7. Click the **Send** button.

**Figure 2: Notification Email Template**

**Notify Selected Recommenders**

\*Your E-mail:

\*Subject:

\*Message:

Maximum (5000) characters

**Step 5:** Change the subject line, if you wish.

**Step 6:** Change or add to the instructions for the recommender(s) here. See suggested additional text above.

**Step 7:** Click the Send button

When the email(s) has been successfully sent, you will return to the “Recommenders” page and see a message in red text indicating the selected recommenders have been notified (see Figure 3).

**Figure 3: Recommenders Page with Confirmation Text**

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\* Required before final submit

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**Recommenders**

Selected recommenders have been notified.

Please provide a valid email address for individuals submitting letters of recommendation for your application. Mark the send email checkbox and click the send button to email each of your recommenders a link for uploading the requested letter of recommendation to your application. It is suggested that you notify the recommender to expect the email. Once the letter has been uploaded, the document will be listed on the Attachment page of this application. The red asterisk (s) indicates the minimum number of letters required. You will be able to submit the application after the required number of letters are uploaded to the application. If you need to change any of your recommenders, you must (1) remove the original recommender, (2) enter the email address for the new recommender, (3) mark the send email checkbox, and (4) click the send button to email the new recommender a link for uploading the requested letter of recommendation to your application.

Name	E-mail Address	Send email	Remove
* Jean Kramarik	<input type="text" value="jkramarik@bwfund.org"/>	<input type="checkbox"/>	<input type="checkbox"/>
* Debra Holmes	<input type="text" value="dholmes@bwfund.org"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

The name and email address of each recommender to whom an email has been sent will be displayed with a gray background (no longer displayed in a white data entry field) as shown in Figure 3.

Once the requested letter has been uploaded by your recommender, it will be displayed as an uploaded file on the “Attachments” page (see Figure 4).

***NOTE:** Since the letter is required to be confidential, you will not have access to view the contents of the file. You will only be able to see whether the letter has been uploaded.*

**Figure 4: Attachments Page with Successfully Uploaded Confidential Letter Displayed**

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### Attachments

**Uploaded Files**

Title	File Name	Uploaded	E-mail Address	Size	Remove?
Letter of Recommendation	Scott_Letter_of_Recommendation.pdf	09/27/2010 10:55:09 AM	melanies@bwfund.org	7 KB	
Total size of uploaded files				7 KB	
Available				25,593 KB	

[Remove](#)

Once a confidential letter has been successfully uploaded, it will appear in the “Uploaded Files” list on the Attachments page.

- Candidate's Biosketch (four page limit; template required)
- Scientific Abstract (one page limit; template required)
- Research Plan (required; six page limit)
- Bibliography (optional)
- Reprints (up to three; one required and two optional)

If you wish to replace a recommender with a new recommender after you’ve sent a request email, you must first remove the name and email address of the recommender you are replacing, then enter the name and email address for the new recommender, and finally send an email to the new recommender. To do this, follow these steps:

1. Access the “Recommenders” page of your CASI application. The name and email address of each recommender to whom an email has been sent will be displayed with a gray background (no longer displayed in a white data entry field) (see Figure 5).
2. Click to place a check in the box in the ‘Remove’ column for the recommender you wish to remove.
3. Click the **Remove** button. The recommender’s name and email address will now be displayed in white data entry fields (see Figure 6).

4. Replace the original recommender name and email address with the name and email address of the new recommender in the appropriate fields.

**IMPORTANT:** You *MUST* send an email to the new recommender so that he/she can upload a confidential letter to your application.

5. Be sure the “Send Email” box is checked to send an email request to the new recommender. *It is highly recommended that you notify your new recommender to expect the email.*
6. Click the **Send** button. A notification email template will appear (see Figure 2).
7. Follow steps 5 through 7 on page 2 above.

**IMPORTANT:** For troubleshooting tips with the confidential letters process, see pages 7 through 8.

**Figure 5: Recommenders Page Displaying Recommenders Who Have Been Sent a Request Email**

**Recommenders to whom an email has been sent are shown with a gray background.**

**To replace a recommender.... First, click to check the appropriate box in the 'Remove' column.**

**Second, click the Remove button.**

The screenshot shows the "Recommenders" page of the "Career Awards at the Scientific Interface 2011 Full Application" website. The page lists two recommenders, Jean Kramarik and Debra Vought, with their names and email addresses. The "Send email" checkbox is checked for both, and the "Remove" button is visible for each. A red box highlights the "Remove" button for Debra Vought.

Name	E-mail Address	Send email	Remove
* Jean Kramarik	jkramarik@bwfund.org	<input checked="" type="checkbox"/>	<input type="checkbox"/>
* Debra Vought	dvought@bwfund.org	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Buttons: Send, Remove

**Figure 6: Recommenders Page After Clicking the 'Remove' Button to Remove a Recommender**

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### Recommenders

submitting letters of recommendation. After uploading the request, the recommender's name and email address will be displayed in the table below. (S) indicates the minimum number of letters required. You will be able to submit a new letter of recommendation after the current one has been uploaded, the current one is no longer needed, or you have reached the maximum number of letters allowed.

If you need to change any of your recommenders, you must (1) click the Remove button, (2) click the Add button, (3) mark the send email checkbox, and (4) click the send button to send the recommendation to your application.

Name	E-mail Address	Send email	Remove
* Jean Kramarik	jkramarik@bwhfund.org	<input checked="" type="checkbox"/>	<input type="checkbox"/>
* Debra Vought	dvought@bwhfund.org	<input checked="" type="checkbox"/>	<input type="checkbox"/>

**Third,** replace the name and email address of the removed recommender with the name and email address of the new recommender.

**Fourth,** send the new recommender an email requesting a confidential letter.  
(Follow steps 3 through 7 beginning on page 1 above.)

## Troubleshooting Common Issues with the Confidential Letters Process

**Issue:** The applicant received an error message containing the text “....*wasn't able to deliver your message to the following addresses.*”

1. Confirm that the email address listed in the error message is valid by sending a test email from your email software. If the test email is successfully sent and received, wait one to two hours (or even overnight) and try sending the email again from the “Recommenders” page of the application.
2. On the “Recommenders” page, confirm that the email address was entered in the email field instead of the name field.

Once these steps have been verified, BWF recommends the following:

1. Remove the recommender’s name and email address from the application. Re-enter the recommender’s name and email. Resend the email.
2. Obtain an alternate email address (*Yahoo, gmail, hotmail, etc.*) from the recommender. The email sent previously may be caught in the university’s spam filter. If this is not a possibility, please contact Debi Vought at 919-991-5116 or [dvought@bwfund.org](mailto:dvought@bwfund.org).

**Issue:** The recommender never received the email sent by the applicant.

1. Confirm that the email address you used to send the email is valid. The applicant may try copying the email from the BWF grant application system into another email and sending it to the recommender to confirm the address is working properly.
2. On the “Recommenders” page, confirm that the email address was entered in the email field instead of the name field.
3. Confirm on the “Recommenders” page of the application that the applicant checked the box beside the appropriate recommender and clicked the “Send” button. If the applicant clicked the “Send” button, he/she should have received the notification email template (see Figure 2 in the instructions). In addition, the recommender’s name should no longer appear in a white box, but rather appear on the recommender screen with a gray background (see Figure 3 in the instructions).

Once these steps have been verified, BWF recommends the following:

1. Verify the email address for the recommender. Remove the recommender’s name and email address from the application. Re-enter the recommender’s name and email. Resend the email.
2. Obtain an alternate email address (*Yahoo, gmail, hotmail, etc.*) from the recommender. The email sent previously may be caught in the university’s spam filter. If this is not a possibility, please contact Debi Vought at 919-991-5116 or [dvought@bwfund.org](mailto:dvought@bwfund.org).

**Issue:** The recommender received the link, but cannot log in to upload the letter.

Error messages are shown in red font at the top of the screen. Note the error message that the recommender is receiving. If the error message states: “*Thank you for taking the time to respond to a request for recommendation. However, you cannot provide input at this time. Please contact the applicant if you have any questions.*”.....

1. Depending on the format of the recommender’s email, the web link for the recommender to use to access BWF’s system may be wrapping to another line. The recommender must copy and paste the entire link into the web browser. The link is specific to the applicant and designated recommender.
2. The recommender entered an incorrect email address. The email address must EXACTLY match the one that was entered in the system by the applicant. It should be the same email address that the email containing the link was sent to initially.

If the error message states something different, contact Debi Vought at 919-991-5116 or [dvought@bwfund.org](mailto:dvought@bwfund.org).



**Issue: The recommender is able to log into the site, but cannot upload the letter.**

Confirm that the recommender is uploading a PDF file. If not, there will be a red error message at the top of the screen indicating “*You are trying to upload a file with an unaccepted file type. Please upload a file of one of the following types: PDF.*” BWF accepts only PDF files as application attachments.

**Issue: The recommender has uploaded the letter successfully, but would like to upload a revised letter.**

The applicant cannot remove the letter for the recommender. BWF staff cannot remove the letter for the recommender. Only the recommender can remove the original uploaded letter and replace it with a revised letter. To do this, the recommender **MUST** have the initial email and web link that was sent by the applicant. To replace the original letter with a revised letter, the recommender must do the following:

1. Retrieve the initial email and web link originally sent to the recommender by the applicant.
2. Using the correct email address, log in to the system to access the page where the confidential letter was uploaded.
3. Check the “Remove” box next to the html link for the initial letter.
4. Click the “Remove” button.
5. Browse to select the revised letter (.pdf file) on your system.
6. Click “Upload.”
7. Click the “Finished” button.
8. View the acknowledgment that the letter has been successfully submitted.

***If the recommender no longer has the initial email containing the link, the revised letter cannot be removed. The recommender will need to email the revised letter to Debi Vought ([dvought@bwfund.org](mailto:dvought@bwfund.org)) to be replaced after the application is submitted.***

***For detailed instructions for the recommender,  
see the “[Recommender Instructions for Uploading a Confidential Letter](#)”.***

If problems arise email Debi Vought, Senior Program Associate,  
at [dvought@bwfund.org](mailto:dvought@bwfund.org) or call 919/991-5116.