

BURROUGHS WELLCOME FUND Instructions for Institutional Signing Official

An applicant to the Burroughs Wellcome Fund (BWF) Career Award at the Scientific Interface program has added you as the Institutional Signing Official to their application. The Institutional Signing Official is responsible for certifying the applicant's eligibility for the award, that the institution approves the application submission, and that the institution is eligible to receive the award. For information on the eligibility requirements for the BWF Career Award at the Scientific Interface (CASI) visit:

<https://www.bwfund.org/grant-programs/interfaces-science/career-awards-scientific-interface>

STEP ONE: Applicant adds the Signing Official (SO) to the application generating an email to the official informing them they have been added to the application.

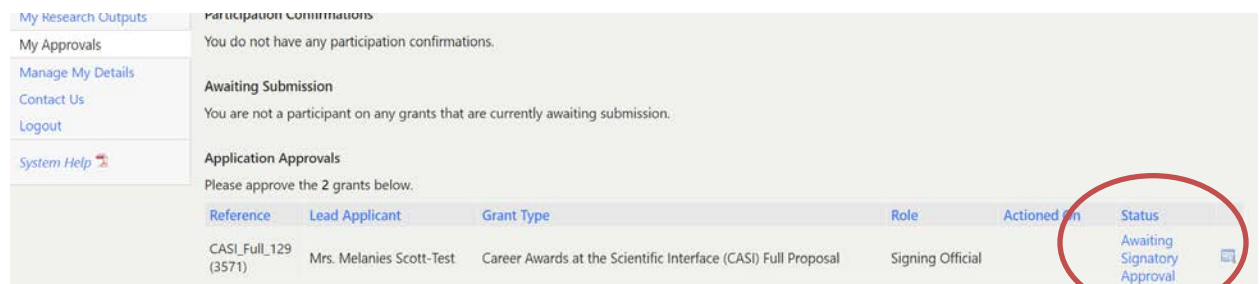
STEP TWO: If the Signing Official does not have account on the BWF Grant Tracker system, the Signing Official will need to create an account (see Creating an account on BWF Grant Tracker) and will receive a second email.

Please note that a single account can be created per email address. It is recommended that institutions do not use shared email addresses.

STEP THREE: The Signing Official waits for the applicant to complete all portions of the application, including the upload of confidential recommendation letters by the applicant's recommenders. The applicant should submit the application by the application deadline on January 7, 2022 at 4:00 pm (ET).

STEP FOUR: The Signing Official receives an email with a link to the application, once the applicant submits the application.

1. Click on the link and login using your email and password.
2. The following screen should appear:



My Research Outputs
My Approvals
Manage My Details
Contact Us
Logout
System Help

Participation Confirmations
You do not have any participation confirmations.

Awaiting Submission
You are not a participant on any grants that are currently awaiting submission.

Application Approvals
Please approve the 2 grants below.

Reference	Lead Applicant	Grant Type	Role	Actioned on	Status
CASI_Full_129 (3571)	Mrs. Melanies Scott-Test	Career Awards at the Scientific Interface (CASI) Full Proposal	Signing Official		Awaiting Signatory Approval

3. Click the [Awaiting Signatory Approval Link](#), which leads to the application's home page.
4. A PDF of the application is available for review.

The screenshot displays the application details and action options. On the left, a table lists the following information:

Lead Applicant	Mrs. Melanies Scott-Test
Title	CASI Test Proposal - 10-16-2020
Reference	CASI_Full_129 (3571)
Status	Awaiting Signatory Approval
Institution	East Carolina University School of Medicine
Grant Type	Career Awards at the Scientific Interface (CASI) Full Proposal
Funding Round	CASI Full Proposal
Closing Date	Friday, January 8, 2021 at 4:00 PM ET
Participants	<i>PhD Advisor</i> [Redacted]
	<i>Postdoc Mentor</i> [Redacted]
Signatories	<i>Signing Official</i> Dr. Melanie Test-Sign2 Signatory approval status: Approval Required
Created On	Wednesday, October 14, 2020
Last Updated	Friday, November 13, 2020
Validated	Friday, November 13, 2020
Applicant Submitted	Friday, November 13, 2020
Submitted On	

On the right, there are three action panels:

- Role: Signing Official** (Actions shown below are for your involvement as a Signing Official)
- Please view and read this application.** (Includes a **View/Print** button)
- Approve the application** (Includes an **Approve** button)
- Reject the application** (Includes a **Reject** button)

Two red callout boxes provide instructions:

- One points to the **View/Print** button with the text: "CLICK HERE to view a copy of the application".
- Another points to the **Approve** button with the text: "CLICK HERE to begin the approval process."

STEP FIVE: Complete the certification form.

1. Click Approve to begin the certification process.
2. Complete the Certification Form. Click the [Basic Information](#) link to update contact information (*a second browser window will open*)

The screenshot shows the "BURROUGHS WELLCOME FUND CASI Full Proposal Institutional Certification Form". It includes instructions for the signing official to certify information and complete the form. A red callout box points to the **Basic Information** link in the "Signing Official Information" section, with the text: "To update the contact information displayed, click the blue link. A contact information page should open in a new tab in the browser. Complete the required fields with a red dot. Click Save when done."

The "Signing Official Information" section contains the following text:

Please check your details below. Fields marked ***** are mandatory. To update your Contact details, click on the **Basic Information** link. This will open a new tab where you can update and save your details. Return to this tab and **Save** or **refresh the page** to see your changes.

Prefix: Dr. Primary Institution: **Burroughs Wellcome Fund**

3. Finish the Certification Form completing all required fields. The Institutional Signing Official will need to:
 - Verify the nonprofit status of the degree granting institution
 - Provide the Tax Id of the organization
 - Certify that the applicant meets the eligibility requirements for the award.

The screenshot shows two sections of a certification form. The first section, 'Institutional Requirements', contains a checkbox with a red dot next to it, which is pointed to by a red arrow. The text next to the checkbox reads: 'The above named degree-granting institution in the U.S. or Canada holds documentation of its current nonprofit status, its tax exempt (501(c) (3) or equivalent) status. Note: Documentation does not need to be submitted with the application.' Below this is a text input field labeled 'Institution's Tax ID:'. The second section, 'Candidate Requirements', contains two checkboxes, both with red dots next to them, pointed to by red arrows. The first checkbox is followed by the text: 'This institution certifies that the above named applicant meets all eligibility requirements for the Career Awards at the Scientific Interface.' The second checkbox is followed by the text: 'This certifies that the above named applicant is either (1) a U.S. or Canadian citizen, (2) a permanent resident of the U.S. or Canada, or (3) a temporary resident of the U.S. or Canada. If the applicant is not a U.S. or Canadian citizen, this institution further certifies that the applicant holds valid documentation of his/her current permanent residency status in the U.S. or Canada, or holds a current, valid U.S. visa, and that the applicant's visa will allow him/her to remain in the U.S. during the postdoctoral or fellowship period of the grant. Note: If a grant is awarded to a temporary resident of the U.S. on the basis of this information and the individual's visa documentation expires, BWF will not intercede on behalf of non-citizens whose stay in the U.S. may be limited by their visa status.' Below these sections is a 'Validate Institutional Certification' section with a 'Validate' button.

Verify the degree granting institution's nonprofit status. Enter the Tax ID of the organization.

Certify the applicant meets all eligibility requirements

4. **Validate** the application by clicking the Validate button. Verify all information is complete.
5. **Approve** the application by clicking the approve button.

The screenshot shows the 'Validate Institutional Certification' section. It contains a 'Validate' button and an 'Approve' button. Below the buttons is a 'Validation Summary: COMPLETE' section. The text in this section reads: 'This institutional certification form is now COMPLETE. Click the [button] to approve the application. You will be returned to the [page]. From the main details page, you may also logout of the system on the left sidebar.' A red arrow points from a callout box to the 'Validate' button, and another red arrow points from a callout box to the 'Approve' button.

Click Validate to verify all the requested information is complete

REMEMBER to click the **APPROVE** button to approve the application

Creating an Account of BWF Grant Tracker

If the institutional signing official does have an account on BWF Grant Tracker, the signing official will need to establish one. Most likely individuals do not have an account, since this system is newly implemented at BWF. This account may be used for future BWF activities and individuals will not need to re-establish the account for this email address. Only one account can be created per email address.

To create the account, the signing official should have received an email from the Grant Tracker system to set up your account (it was likely the first email you received from the system). To confirm your account:

1. Click on the link in the email. The email subject should be “BWF Grant Tracker Account”
Your account for the Burroughs Wellcome Fund Grant Application System has now been created. Please use the following link to create your password:

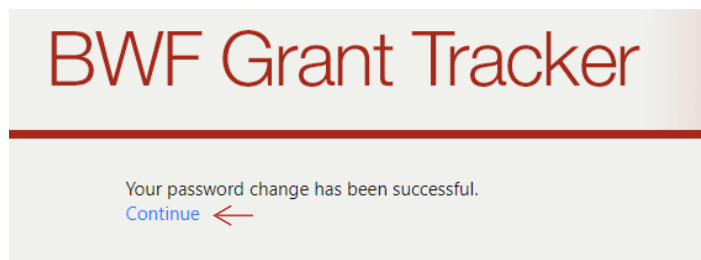
2. Create a password for your account. Note the parameters for a new password. Click the *Change* button to save the password. (**Remember the password – you will need it later!**)

Please enter a new password.
New password must be a minimum of 8 characters, and must contain any 3 of the following: numbers, uppercase characters, lowercase characters, or special characters.

Password

Confirm Password


3. Click *Continue*.



4. Review the Terms and Conditions and *click the box*, indicating acceptance. Click *Next*.

Terms and Conditions

Before you can log in, please read and accept our terms and conditions below.

 [Terms and Conditions of Use](#) | accept ←

5. Complete the following form. Last name and organization will be required. It is also recommended the signing official complete the following fields, since they will be required when you submit your letter (First Name, Last Name, Job Title, Department, Address, Organization, and Telephone). ORCID ID and Areas of Expertise are not required.

Click *Save* when done.

Please complete the following form.

Prefix (select) ↓

First Name First Name ←

Middle name / initial

Last Name Last Name • ←

Suffix (select) ↓ ⓘ ←

Organization • ←
To select your organization, begin typing its name and select from the list.
If your organization is not available in the dropdown list, continue typing the full organization name and click Save. BWF will validate the organization once your request is submitted.

Department ←

Job Title ←

Academic Rank (select) ↓

Doctoral Degree (select) ↓

Addresses No addresses specified. add... ← **Click to add office address**

Telephone ⓘ ←

Extension

Mobile

Additional Emails

Type	Email
add...	

ORCID ID add ORCID or register with ORCID

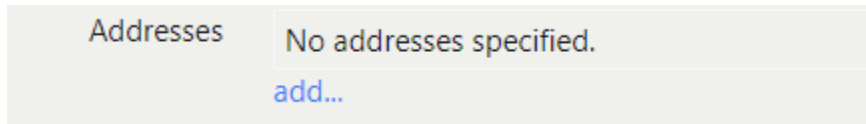
ORCID Authorisation Date: ----

Areas of Expertise [Choose Classifications](#)
No Classifications found. ⓘ

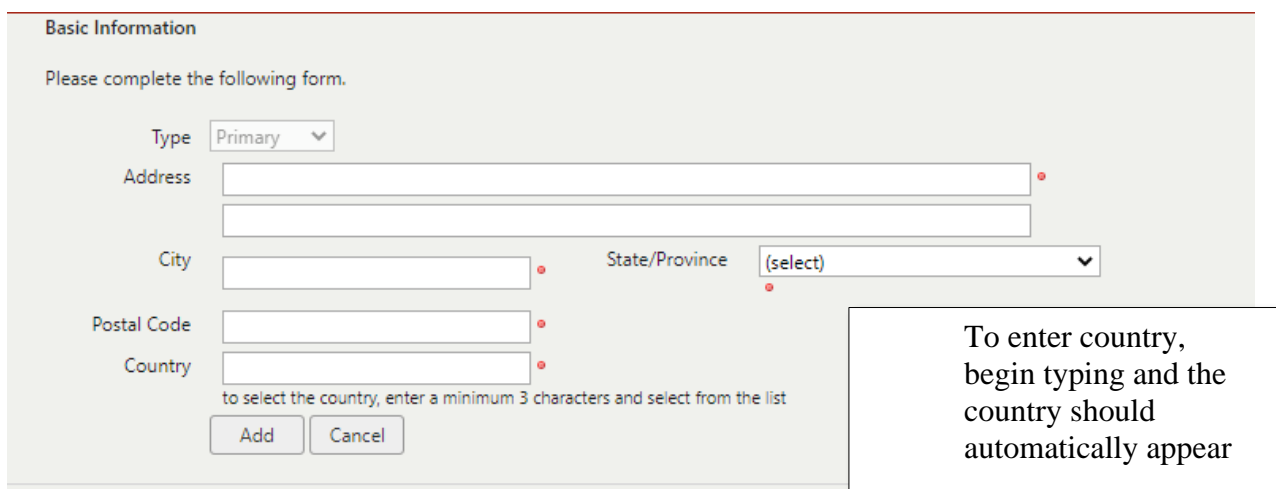
ORCID and Areas of Expertise are not required

Tips for adding the organization: Begin typing the organization name in the drop-down list. The name of the organization should automatically populate. If the organization is not listed, try a university you may be affiliated with.

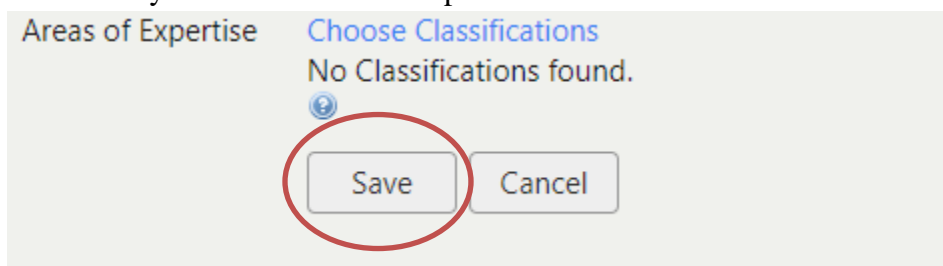
Tips for adding the address: To add the address, click the blue *add address link* on the basic information form.



The pop-up below will appear. Click *Add* when the required fields have been completed.

A screenshot of a "Basic Information" form. The form includes a "Type" dropdown menu set to "Primary", an "Address" field with two lines, a "City" field, a "State/Province" dropdown menu set to "(select)", a "Postal Code" field, and a "Country" field. Below the "Country" field is a note: "to select the country, enter a minimum 3 characters and select from the list". There are "Add" and "Cancel" buttons at the bottom. A callout box on the right contains the text: "To enter country, begin typing and the country should automatically appear".

6. Click **Save** when done. Remember your password (you will need it later)! You may logout of the system on the left-hand panel.

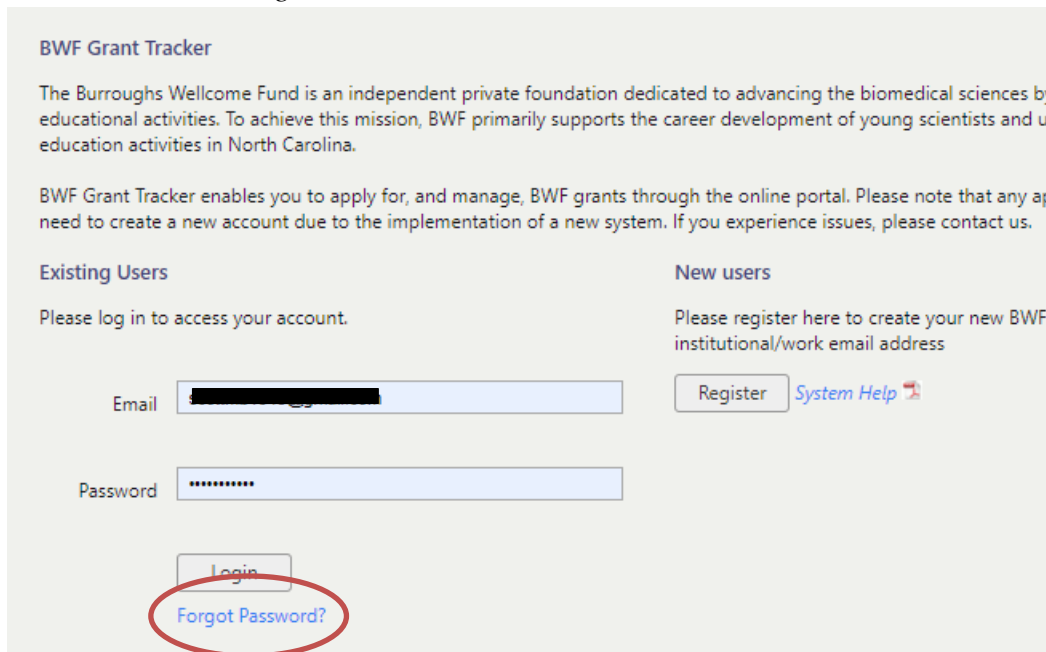


Forgotten Passwords

If you have forgotten your password, you may access the BWF Grant Tracker portal site through your email link or at the portal homepage:

<https://bwfund.ccgrantracker.com>

1. Click the *Forgot Password* link:



BWF Grant Tracker

The Burroughs Wellcome Fund is an independent private foundation dedicated to advancing the biomedical sciences by educational activities. To achieve this mission, BWF primarily supports the career development of young scientists and u education activities in North Carolina.

BWF Grant Tracker enables you to apply for, and manage, BWF grants through the online portal. Please note that any ap need to create a new account due to the implementation of a new system. If you experience issues, please contact us.

Existing Users
Please log in to access your account.

Email

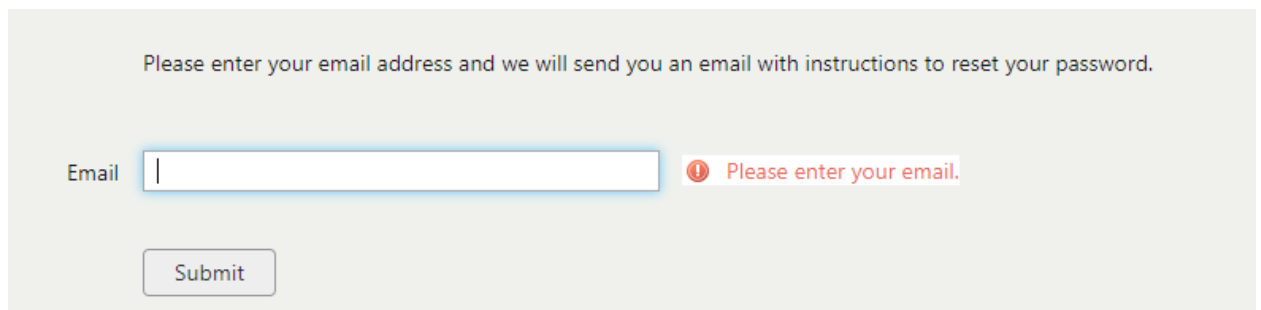
Password

[Forgot Password?](#)

New users
Please register here to create your new BWF institutional/work email address

[System Help](#)

2. A pop-up window will appear. Enter the email address that you used for your account. Click *Submit*.



Please enter your email address and we will send you an email with instructions to reset your password.

Email

ⓘ Please enter your email.

3. A link will be emailed to you to change your password. Click the link in the email message and change your password. Click *Change*.