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.
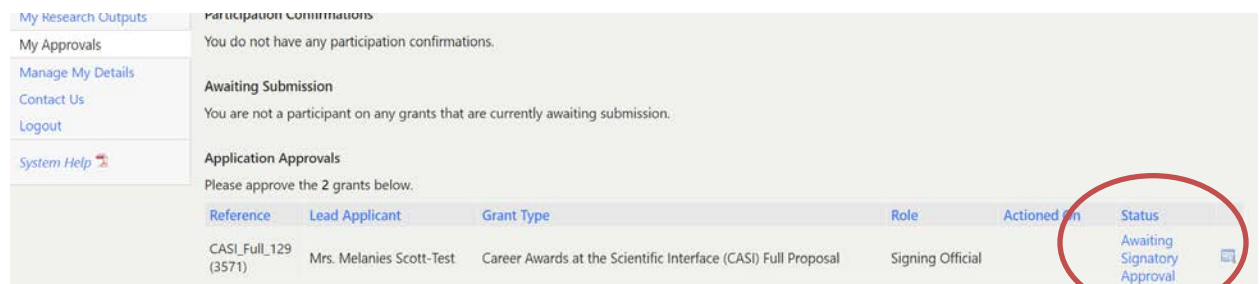
STEP TWO: If the Signing Official does not have account on the BWF Grant Tracker system, the Signing Official will need to create an account (see Creating an account on BWF Grant Tracker) and will receive a second email.
Please note that a single account can be created per email address. It is recommended 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 <u>application deadline on January 7, 2022 at 4:00 pm (ET)</u>.

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:

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.

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)*

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.

Institutional Requirements

☐ • 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.

Institution's Tax ID: _____

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

Candidate Requirements

☐ • This institution certifies that the above named applicant meets all eligibility requirements for the Career Awards at the Scientific Interface.

☐ • 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 do may terminate the grant. BWF will not intercede on behalf of non-citizens whose stay in the U.S. may be limited by their

> Certify the applicant meets all eligibility requirements

Validate Institutional Certification

Click **Validate** to check your responses then follow instructions in the Validation Summary below.   [Validate]

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

5. **Approve** the application by clicking the approve button.

Validate Institutional Certification

Click **Validate** to check your responses then follow instruction   [Validate]   [Approve]

> Click Validate to verify all the requested information is complete

Validation Summary: COMPLETE

This institutional certification form is now **COMPLETE**. Click th   pplication. You will be returned to th

From the main details page, you may also logout of the system on the left sidebar.

> 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   ••••••••••

Change

3. Click *Continue.*

BWF Grant Tracker

Your password change has been successful.
Continue ⟵
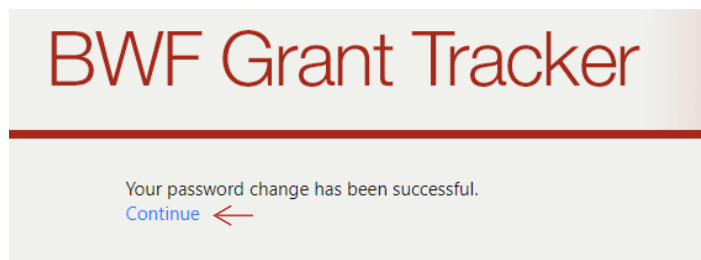
4. Review the Terms and Conditions and *click the box*, indicating acceptance. Click *Next*.

Terms and Conditions

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

📄 Terms and Conditions of Use   I accept ☐ ←

[Next]

5. Complete the following form. Last name and organization will be required.
It is also recommended the signing offical 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). ORDID ID and Areas of Expertise are <u>not</u> 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 and Areas of Expertise are not required**

ORCID Authorisation Date: ----

Areas of Expertise	Choose Classifications No Classifications found. ⓘ

[Save] [Cancel]

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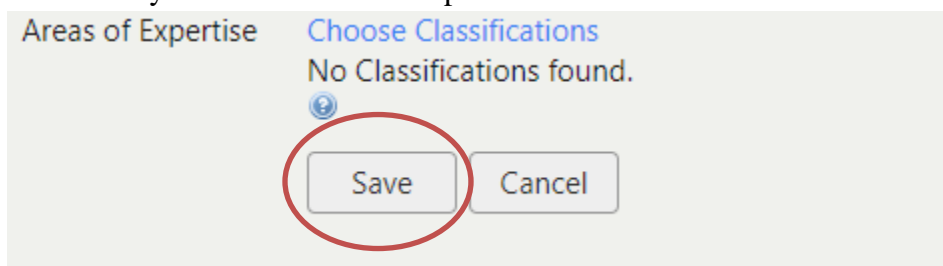
*Tips for adding the address***:** To add the address, click the blue *add address link* on the basic information form.

Addresses   No addresses specified.
             add...
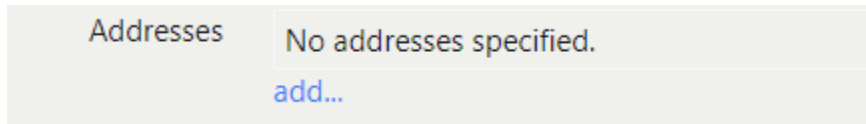
The pop-up below will appear. Click *Add* when the required fields have been completed.

Basic Information

Please complete the following form.

Type   Primary

Address

City   State/Province   (select)

Postal Code

Country

to select the country, enter a minimum 3 characters and select from the list

    Add   Cancel

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.

Areas of Expertise   Choose Classifications
                      No Classifications found.
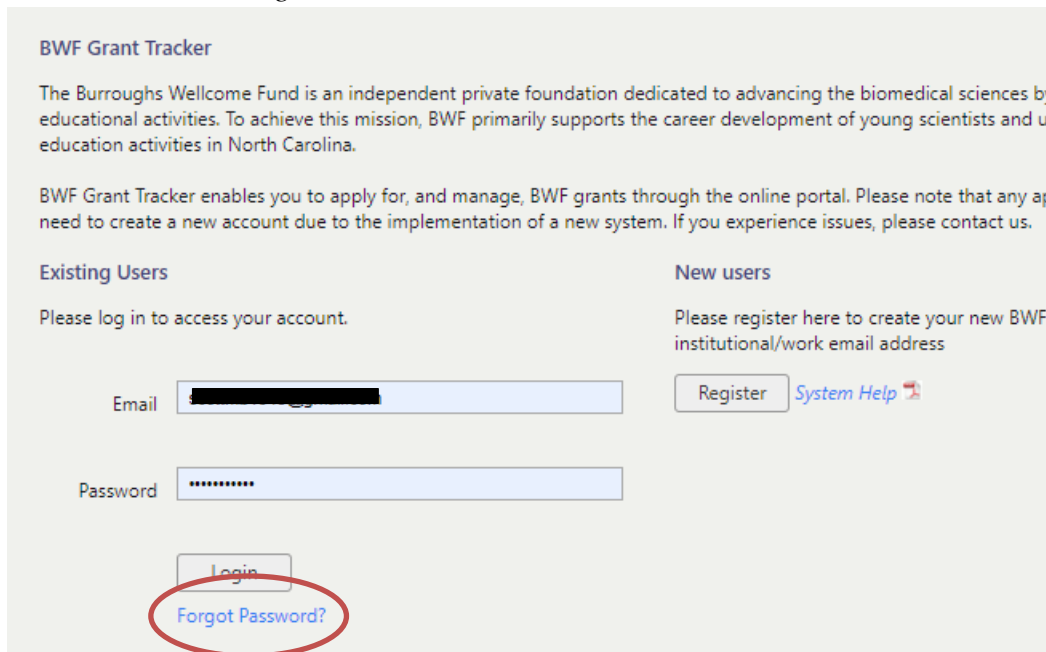
    Save   Cancel

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.ccgranttracker.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 ui 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

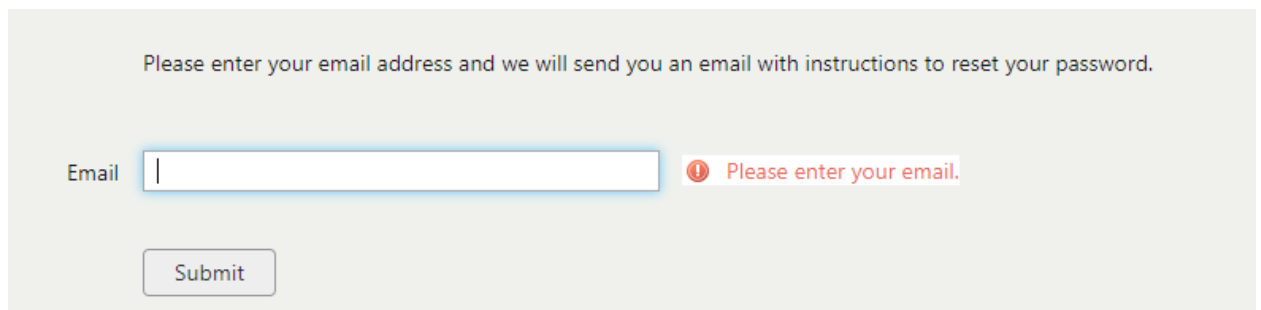Please log in to access your account.

Email

Password

Login

Forgot Password?

New users

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

Register | *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.

Submit

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*.