

## Creating a Pivot account

If it's your first time accessing Pivot, please go to <https://pivot.cos.com> and click "sign up" in the right top corner of the page. Fill out the form, inputting your UNTHSC email and choosing "University of North Texas" as the affiliated member institution. You will receive a confirmation email in your UNTHSC inbox. Follow the link and confirm your account.

## Login into Pivot

To login into Pivot press "login" in the right top corner of the page. Username is your UNTHSC email address. Password is the password you chose when you created your Pivot account.

*Note: If you are unable to login, please notify [svetlana.pitts@unthsc.edu](mailto:svetlana.pitts@unthsc.edu). It is a known bug.*

## Setting up and saving an advanced search

After you have a Pivot account, you will receive funding updates by default. However, these updates will be not properly targeted with both false positives (for example, postdoctoral fellowships sent to professors) and false negatives (some of your areas of interest not being included). Therefore, creating your own targeted "advanced search" can be very advantageous. To do so,

1. Select the tab labelled "Funding"
2. Click "advanced search" underneath the search bar.

*Note: below describes how to fill out each one of the fields of the advance search. Any of these fields can be left empty.*

3. Type what fields/topics you are interested in: horizontal fields are for alternatives (for example you are looking for funding to research "Alzheimer's" or "Huntington") and vertical fields are to narrow down your selection. Only one word in one of the fields is necessary to proceed.

### Tips:

- *Most likely you will have to tweak this section later on to obtain the best results, so if you cannot immediately come up with the best descriptor of your target area, you can try one option, run the search, evaluate results, adjust the wording, run the search again and so on.*
- *If you are looking for funding for more than one of your research interests, it might be easier to create a separate search for each of them, rather than fit all of them in to one search. You can have as many searches running in parallel, as you want.*

The table below contains recommendations on how to use other search criteria.

Amount	If you are only interested in larger grants, select "more than" and enter the amount. If you are open to any amounts, you can leave this field empty.
Deadlines	If you are open to any deadline, leave it empty. If you are looking for a deadline that is not too soon, choose "select from the calendar", then "on or after" and choose a date you are comfortable with as an earliest deadline. <i>Note: if you generally plan to look for grants with a deadline at least a week, a month, three or six months away, do not select anything in this section. There will be a better way later.</i> <i>If you are looking for a grant to apply for soon, select either x days from today option, or "select from the calendar", then "on or before" and choose a date you are comfortable with as the latest deadline.</i> Check "include optional deadlines" and "include continuous or undefined deadlines".
Limited submission	If you select "limited submission" it will limit your search to only limited submissions, so it is not advisable to do so. If you do not select anything, limited submissions will be included in your search results along with regular opportunities.

## Claiming or creating Pivot profile

After you create a Pivot account you also have to create a Pivot profile. Click on your name in the right top corner of the page, then select the top option "claim your profile". This will take you to a page showcasing profiles you can claim. If you see yourself, press "claim profile" on the right of the entry you want to claim. If you do not see yourself, press the link "create a profile" on the left of the page, and go through the questionnaire.

*Note: While there are many fields to fill out, the only ones you really need are your name and affiliation (select UNTHSC, which will be present as a part of UNT). Everything else is optional, and wouldn't provide you any significant benefit.*

Activity location	Select Texas as your activity location. Add any other states or countries where you wish to perform your work. Include “Unrestricted”, “Unspecified”, “Sub-entities” and “Super-entities”.
Citizenship or Residency	Select all citizenship or residency, that apply to you . Include “unrestricted” and “unspecified”.
Funding type	Select all types of endeavors you are looking for funding for.
Keyword	Keywords largely mirror the research area you typed in the first section, except you have to select from the list predetermined by Pivot. You do not have to select any.
Applicant Type	Select all applicant types that apply to you (academic institution, non-profit, individual in an appropriate career stage, etc.) <i>Note: Option “Individuals: Early Career and Emerging in Field” is intended for postdocs and junior faculty. Option “Individuals: Mid-Career to Established in Field” is intended for mid- to senior-level faculty .</i>
Sponsor Type	Select any particular type of sponsor you want support from. This can be left empty.
Exclude Opportunities matching	In this section you can exclude various things from your search using the criteria described above. <i>Tip: If you are looking for grants with a deadline at least a week, a month, three or six months away, select corresponding option in deadlines and unclick “include optional deadlines”.</i>

- Run the search. If you are unsatisfied with the results, click “refine search” and adjust the search criteria.
- When you like the type of results this search provides, click “save search”, choose a name and make sure you check “Would you like to receive a weekly email containing new or updated opps from this query?” You will now receive weekly updates on your search.

*Note: If you used “select from the calendar” option in the deadline section, do not forget to log into Pivot from time to time and adjust your deadline choice as time goes by.*

## Managing saved searches and interesting funding opportunities

### Managing opportunities

a) After you run your search, you will see a list of funding opportunities. If you click on any of them, you will be able to read details about the grant. If this opportunity seems interesting to you, there are two ways to save it in your Pivot account. On the right you can either select “track” or “set to active”. The idea behind it is that you will have grants saved in one of two folders. One folder being grants you are actively working on applying for, and the other – grants you will apply for in the future. It does not matter which folder you use for which purpose (or if your purpose is different altogether).

b) After you select “track” or “set to active”, the posting will be available to you on the home page of your Pivot account (tab with a picture of the house) in the “active” or “tracked” tab. There are also additional options located to the right of each opportunity: “untrack”, move to another folder, add to your Google, iCal or outlook calendar, add a deadline reminder and so on.

### Managing saved searches

a) After you saved the search, it will be available to you on the home page of your Pivot account (tab with a picture of the house) in the “saved searches” tab.

b) For each your searches you have a set of “options” – go there when you need to edit or delete your search.

c) If you click on one of your saved searches, you will automatically see new results since the search was run the last time. If you wish to see results you saw before select “all”.

*Note: On the top of your list of saved searches is “advisor alert” – this is a default and not targeted alert in Pivot. While you cannot delete it, I recommend to turn the alert email off (located in options to the right of the “advisor alert”).*