



## **COS Pivot Funding Database: Research Scientist User Guide**

Harvard University subscribes to COS Pivot, a comprehensive web-based resource of funding information, which publishes more than 15,000 federal, non-federal, and industry-sponsored funding opportunities.

### **Setting up an Account**

One of Pivot's most useful features is its ability to save searches, automatically run them on a weekly basis, then notify users when opportunities matching their search parameters are announced. Before performing searches, new users must create an account using their Harvard e-mail.

Sign-up for an account on the Pivot Website: [https://pivot.cos.com/funding\\_main](https://pivot.cos.com/funding_main)

- Click on Sign Up in the upper right corner of the screen
- Use your Harvard-assigned email address
- Choose Harvard University as your Institution

### **Creating an Individualized Search**

**Search Fields:** In the top section, you can search for specific terms within funding announcements.

- You can search for selected search terms in All Fields, Abstract, Title, Sponsor, Sponsor ID, CFDA Number. Unless you're looking for a specific opportunity or sponsor, you should always use the "All Fields" option.
- In this section, you can change the search terms based on the project you're seeking funding for but, in general, we advise that you use broad search terms to begin.
- If you find your search term is producing too few results, try using an alternative one or adding more search terms using the "or" filter.

**Keywords:** You may enter keywords in either the free text boxes at the top of the screen (explained above) OR under the Keyword field. ***Do not enter keywords in both of these sections—choose just one for better results.***

- Under the Keyword field, click on "browse" and select your keyword(s) from the expandable lists
- Check the box for "Explode" to capture the keyword you select and all the subcategories listed below it (We recommend checking "Explode" to begin your search.)

**Activity Location:** Activity Location identifies any requirements about where the grants may be used.

- All Harvard Chan School researchers should select "Massachusetts" as their activity location. Selecting "United States with sub-entities checked" will yield results for all states.
- Always check the boxes for Unrestricted, Unspecified, Sub-entities and Super-entities.
- If you are conducting work outside of Massachusetts (i.e. another state or country) you should also include that country/region in the text field and select "Match any".

**Citizenship or Residency:**

- Awards designated as being for U.S. institutions only are classified under "United States" so Harvard Chan researchers should always check "United States".
- Always check the unrestricted and unspecified boxes.
- If you have multiple countries of citizenship or residency, select all that apply.

**Funding Type:**

- Select any or all types of projects for which you're seeking funding.
- Typically, you'll want to select: Research; Collaboration or Cooperative Agreement; Contract or Tender; Training, Scholarship, or Fellowship.



**Applicant Type:**

- This field refers to the required applicant attributes of both the individual and the institution. Select all that apply.
- Harvard Chan School researchers should always check: “Academic Institution” and “Nonprofit”.
- Junior investigators may want to include “Individuals: Early Career and Emerging in Field”

**Saving or Modifying a Search**

After running your initial search, three links will appear on the top of your search results screen: Advanced Search, Save Search, and Refine Search.

- **Advanced Search** starts a new, blank search screen
- **Save Search** allows you to name and save your search— find your saved searches by clicking on the “home” icon in the top left corner of the screen. On the Saved Searches screen, you can sign up for funding alerts and receive weekly emails with new opportunities that match each search
- **Refine Search** returns you to the search screen with your criteria still entered—you may also narrow your results using the faceted search results on the left side of the search results screen

**Please contact ORSD ([orsd@hsph.harvard.edu](mailto:orsd@hsph.harvard.edu)) if you have any questions about this resource or need assistance creating an account and setting up an individualized search.**