Creating your Pivot account

If you do not have a current account

- Click on the **register for a Pivot account** link
- Complete the required fields including the name of the subscribing institution to which you belong
- Click the **Create my account** button
- You will receive a verification email at the address entered in the account creation process which will include a link to Pivot
- Your email address and the password you entered during account creation will be your Pivot username and password.

Login help

Login help link takes you to the Login Help Options page where you can link to the following links:

- **Create your Pivot account** – see information above
- **Forgot password** – this link takes you to the form to complete to be sent your password
- **Contact Help Desk** – if you need additional assistance logging in to Pivot, let us know how we can assist you and someone from the Help Desk will be in contact with you within one business day
Logging in to Pivot

The Pivot login is presented in the top right-hand corner of the pages in Pivot. You must be logged in to

- View your homepage displaying your Active and Tracked opps and Advisor funding recommendations
- View funding opps shared with you or the status of those you have shared with others
- Save a search
- Add an opp to Active or Tracked
- Share a funding opp
- Claim and/or update a profile
- View matching funding for a profile, or matching profiles for a funding opp

Enter your username and password in the Pivot Login box to start your Pivot session and complete the actions listed above.
My account

Once you are logged in to Pivot, we provide you with some links to manage your profile, account information, and any groups you created for sharing funding opps. Click on your name, and select one of the following:

- **Your Profile or Claim Profile**
  If you already have a profile linked to your account, you will see “Your profile.” Clicking on this takes you to your profile where you can take action to update your information. If you do not have a profile linked to your account, clicking through on “Claim profile” will take you to a list of possible matching profiles, one of which may be yours. If no profile currently exists, you can follow the steps to create a profile for yourself.

- **Change Account info**
  This takes you to a page where you can change your account username or password and select a different affiliation if your account is affiliated with more than one institution that subscribes to Pivot

- **Preferences**
  Allows you to disable search filters that have been set by your administrator for the university as well as set deadline notification preferences for funding opps that are added to either your tracked or active lists (see more about this feature below).

- **Change Affiliation**
  This option is only displayed if your account is affiliated with more than one institution that subscribes to Pivot.

- **Groups**
  Takes you to your groups page where you can create pre-defined groups for sharing funding opps (see below for more details).

- **Sign out**
  This will end your session and log you out of Pivot.
**Deadline Notification Preferences**

This feature allows you to set a default deadline reminder timeline and notification preference for all funding opps as they are added to your Active or Tracked lists. Select your preferred notification method: email, notification from the Pivot announcements link, or both. Then select how far in advance of each deadline on the funding opps you wish to receive a reminder using the options provided. You can set different deadline notifications for Active and Tracked, or only set reminders for one of the two. In addition, you can alter the deadline reminder for any funding opportunity on either list by selecting the **Edit deadline reminder** on the Options menu for any funding opp on either list.

**Groups**

The **Groups** area allows you to create pre-defined lists (groups) of email addresses which you can use when sharing funding opps or saved searches in Pivot. You can edit, rename, or delete groups in this area.

To create a new group:

1. Click your name in the upper right-hand corner
2. Click **Groups**
3. Click **New Group**
4. Enter a name for your group
5. Enter the people for your group – if you are adding colleagues from your Institution, simply type the name and if they have a Pivot profile, their email address will display
6. To enter people who are not in your institution, type the email address and click the "tab" key after entering the email address
7. When you have finished entering names and/or email addresses, click **Submit**