Create Roles (PI / Co-PIs) for a Proposal

> This is applicable to Short Proposals of project calls as well as other one-stage calls (except VRG). For full proposals, roles are transferred from the short proposal phase.

WWTF requires information only about the researchers in the project's core team, i.e., the PI&C and up to two co-PIs.

> In two stage calls, further researchers beyond the core team may also take part in the project, either funded by WWTF or with in-kind contribution. Some information about these further researchers will be required in the full proposal, however, this will not include CVs.

How to invite PIs & Co-PIs to the proposal:

> **Step 1: Invite the PI&C and co-PIs**

1. Go to the tab "Personnel and Institutions" in the proposal
2. Invite a "Principal Investigator and Coordinator" by providing their contact information.
    - **In case you are the PI&C,** please click "I am the Principal Investigator". You can then invite further co-PIs to this proposal.
    - **In case you are not the PI&C,** you will need to be invited to the proposal. The invited PI will receive an email to accept the invitation. The invited person can login with an existing account or register as a new user. You and the PI&C can then invite further co-PIs to the proposal.

> **Step 2: Complete your "Profile"**

The PI&C and all co-PIs must complete "My Profile". *If you are creating a project on behalf of others and are not part of the Core Team, you do not need to provide this information.*

1. Upon login, go to "My Profile" in the top menu to fill out or update your profile. This information needs to be entered only once and can then be used for multiple proposals or in future calls.

- Please upload or update your CV based on the template provided.
- Should you have multiple affiliations, these can be added in your profile. Different affiliations may then be used for different proposals.
- If you want to upload two CVs for different proposals, please follow these instructions .

Step 3: Complete your “Role”

Go to “My Proposal & Roles” in the top menu. Under “My Roles”, click on your role below the title of the proposal.

- **You can update the personal information by clicking on “Refresh from profile”. The system will check if there is new information in “My Profile” and update this section accordingly.**
- Enter data in the respective fields:
  - Scientific expertise
  - Role and responsibilities within the project *(500 characters)*
  - Specific competencies for the project *(500 characters)*

Please note that the information entered here should be specific to the project. If you are participating in multiple proposals that requires different subsets of your expertise, please tailor the information according to the project.

- Select the affiliation with which you want to apply for the proposal. Please note that an authorization signature will be required from this institute for the proposal.
- Check the box under “Affirmation” to confirm acknowledgement of and compliance with guidelines from WWTF and additional relevant organisations.

As the Funding Portal automatically relays entered information about the PI&C and co-PIs into subsequent parts of the proposal, we recommend that the core team members fill out these sections early (e.g., institutions of the core team members are automatically added to the budget).

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