FastLane Help

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Welcome to the FastLane Help System

Note: Click here for the 508-compliant version of the FastLane Help System.

All help for FastLane users is located in the FastLane Help System.

Inside FastLane's applications, links to help topics now go directly to the relevant topic in the FastLane Help System.

All other links and help topics on the FastLane Help Page are fully incorporated into the FastLane Help System. The help system contains quick links to the *Grant Proposal Guide*, the *Award & Administration Guide*, News and Updates, and to any help on the **FastLane Help Page** that takes the user outside the FastLane system.

The purpose of this change is to enable you to find the specific help you need—*fast!*

You can search the entire FastLane Help System to quickly locate the help topic that you need. You can also find relevant help topics through the system-wide Table of Contents or by searching for a keyword in the system-wide Index.

We will continually update the FastLane Help System in step with changes to FastLane applications.

Search for FastLane Help

There are three ways to get the precise help you need in the FastLane Help for Proposal Functions:

- Search for specific help with a keyword
- Look in the Table of Contents
- Check the Index for keywords

Contact FastLane for Help

The FastLane Help System is the centralized location for all the guidance you need in your interaction with NSF through FastLane. See Search for Help to learn how to find the help you need—***fast*.**

The FastLane Help Desk is also available to help you: 7 AM to 9 PM Eastern Time, Monday through Friday (except for federal holidays):

- Email the Help Desk at fastlane@nsf.gov.
- If your inquiry is an emergency or requires a response in the near term to meet deadlines, call 1-800-673-6188.

To hear the recording on FastLane availability, call 1-800-437-7408.

To give feedback or comments, see FastLane System Comments.

To request support, see Technical Support Service Request.

Note: Don't use FastLane System Comments or the Technical Support Service Request to submit FastLane text or files.

Proposal & Award Policies & Procedures Guide (PAPPG)

Consult the *Proposal & Award Policies & Procedures Guide (PAPPG)*, for all of your questions on NSF policy regarding preparing a proposal and NSF policy on awards.

This link takes you outside of FastLane.

MyNSF

Sign up for MyNSF to receive notifications about new content posted on the NSF website. Notification can be received via the system, "NSF Update".

News and Updates

Click a link to find out what's new in FastLane and also access current or recent FastLane Advisories.

- Current Advisories (FastLane Homepage)

Introduction to FastLane

Introductionto FastLane

Print contents of the Introduction to FastLane book.

FastLane is the National Science Foundation's (NSF) online website through which we conduct our relationship to researchers and potential researchers, reviewers, and research administrators and their organizations.

In collaboration with NSF, more than 400,000 people use FastLane each year. See Activities Overview for a brief description of the many activities that researchers carry out inFastLane.

Most work in FastLane is carried out in the modules that are displayed in the menu at the top of the FastLane Home Page screen (Figure 1).

Figure 1 FastLaneHome Page screen. The links to FastLane's modules are circled.

The FastLane modules are:

- Proposals, Awards, and Status
- Proposal Review
- Panelist Functions
- Research Administration
- Financial Functions
- Honorary Awards
- Graduate Research Fellowship Program

- Postdoctoral Fellowship and Other Programs

Click on a link above to find out:
- The roles that work in the module's applications
- Purposes and activities of each module and its applications

For detailed guidance for proposals and awards, see the NSF *Proposal & Award Policies &Procedures Guide (PAPPG)*

Note: The Help Topics for the activities in Proposals, Awards, and Status and in Research Administration are located in these Help folders:
- Proposal Functions
- Award Functions
- PI Functions
- SPO Functions
- AOR Functions

Introductionto FastLane

Print contents of the Introduction to FastLane book.

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- Award Functions
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- SPO Functions
- AOR Functions

ActivitiesOverview

FastLanecovers the full range of transactions between a research organization, its researchers, and NSF. Below are the major activities you can conduct in FastLane, depending upon your role and objective.

For the Public and First-Time User

- Search NSF Awards and Funding Trends
- Apply for Graduate Research Fellowships
- Submit nominations and letters of references for awards
- Register with FastLane
- Work on the FastLane Demonstration Site

For the Researcher and Educator

- Prepare a letter of intent in response to an NSF solicitation
- Prepare and update a proposal
- Check on proposal status
- Prepare post-award notifications and requests to NSF
- Sponsor a proposal for a postdoctoral fellowship
- Submit letters of reference for a proposal

For NSF Reviewers and Panelists

- Review a proposal
- Participate in a panel to make proposal-funding recommendations to NSF
- Make travel and EFT arrangements to participate in a panel

For Your Organization's Sponsored Project Office

- Review and edit letters of intent, proposals,proposal file updates,revised budgets and post-award requests
- Manage the NSF accounts for members of your research organization

For Your Organization's Business Office

- Request electronic funds transfers from NSF for an award
- Prepare and submit the required quarterly Financial Cash Transaction Report

For Your Organization's Authorized Organizational Representative

Certify, sign, and submit letters of intent, proposals, proposal file updates, revisedbudgets and post-award requests

Withdraw a proposal that has already been submitted to NSF

For links to more information on these activities, see Introduction to FastLane.

Proposals, Awards, and Status

Proposals, Awards, and Status

Proposals, Awards, and Status is the module where the Principal Investigator (PI) and Co-PIs do the following:

- Carry out all activities associated with proposal preparation
- Carry out all administrative activities associated with an award.

Working in Proposals, Awards, and Status requires registration with FastLane.

Roles

The following persons work in Proposals, Awards, and Status:

- ***(co) Principal Investigator(s)***

Theindividual(s) designated by the proposer, and approved by NSF, who will be responsible for thescientific or technical direction of the project. See PAPPGExhibit II-7 for further information.

- ***Other Authorized User (OAU)***

An individual who is not a PI orCo-PI but is authorized to help prepare a budget, a revised budget or a proposal file update. TheOAU must have the proposal PIN and ID number toaccess Proposals, Awards, and Status.

Table 1 describes the applications in Proposals, Awards, and Status and the roles that use them.

Table 1 Proposal, Awards, and Status Applications

FastLane Application	Who	Activity
Change PI Information	PI, Co-PI	Change your profile information that NSF has on file.
Proposal Functions		
Letters of Intent	PI, Co-PI	• Prepare a Letter of Intent in response to an NSF solicitation. • Forward a Letter of Intent to the AOR for submission.
Proposal Preparation	PI, Co-PI, OAU	• Prepare and edit a proposal. • Delete a proposal. • Forward a proposal to the AOR for submission.
Proposal Status	PI, Co-PI	• Check the status of a submitted proposal. • View any existing reviews of a submitted proposal.
Revise Proposal Budget	PI, Co-PI, OAU	Revise the budget of a submitted proposal at the request of the NSF Program Officer and forward for AOR approval.
Proposal File Update		Revise a proposal after it has been submitted in accordance with *Proposal and Award Policies and Procedures Guide(PAPPG)* Chapter III.C. and forward for AOR approval
Award Functions		

Notifications and Requests	PI, Co-PI	• Prepare notifications and requests for changes in the award. • Forward most requests to the AOR for submission. (See *Proposal & Award Policies & Procedures Guide (PAPPG)* Exhibit VII-1 for details on the kinds of notifications and requests.)
Continuation Funding Status		Check the status of continuation funding for an award.
View/Print Award Documents		View and print award documents, including cooperative agreements.
Supplemental Funding Request	PI, Co-PI	Prepare a request for supplemental funding for an award and forward for AOR approval. (See *Proposal & Award Policies & Procedures Guide (PAPPG) Chapter VI.E.4* for NSF policy on supplemental funding.)

See Accessing Proposals, Awards, and Status.

Accessing Proposals, Awards, and Status

Role	What You Need for Access	Registration Required?
• Principal Investigator (PI) • Co-PI	• Registration with NSF as PI (see your SPO) • Password	Yes
Other Authorized User (OAU)	• Initial password from SPO • Proposal ID from PI • Proposal PIN from PI or • Password • Award Number from PI • Award PIN from PI	
Independent Researcher	Password	Yes, as independent researcher

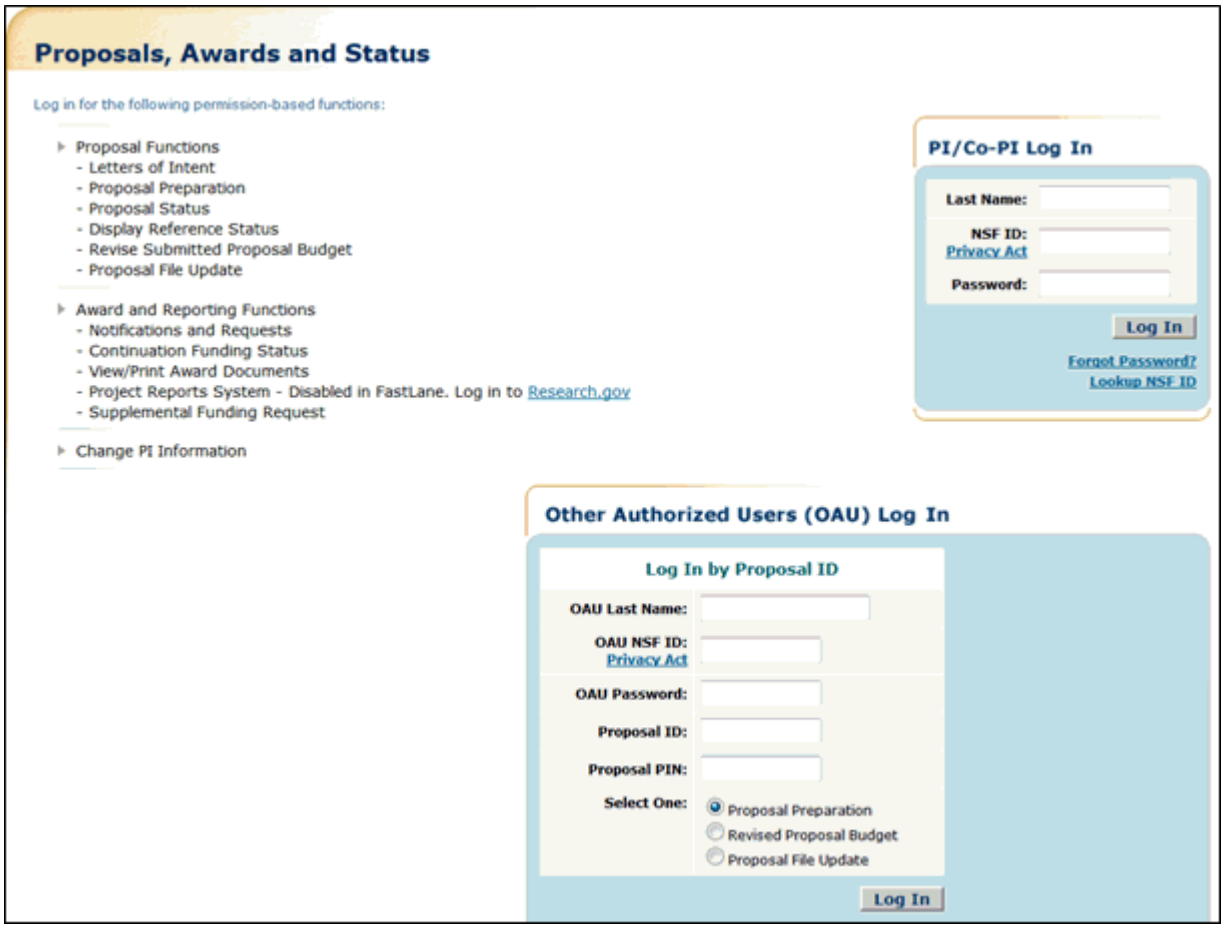

Figure 1 Proposals, Awards, and Status Home Page screen.

Proposal Review

Proposal Review

Proposal Review is the module where an individual gains access to a proposal, for purposes of evaluation, and prepares and submits a review of the proposal to NSF (Table 1).

Proposals are assigned to reviewers by an NSF Program Officer.

Table 1 Proposal Review Applications

Application	Who	Activity
Prepare Review	Proposal Reviewer	Complete and submit the form for review of a proposal.
Download/Save Proposal		Download and save a proposal to your PC for reference.
View Proposal		View a proposal online in PDF format.
Print Proposal at NSF and Mail		Request NSF to print and mail a proposal to you for your review.
Create CD at NSF and Mail		Request NSF to make a CD of a proposal and mail the CD to you for your review.
Edit Reviewer Information		Change your profile information that NSF has on file.

See Accessing Proposal Review.

Proposal Review

Proposal Review is the module where an individual gains access to a proposal, for purposes of evaluation, and prepares and submits a review of the proposal to NSF (Table 1).

Proposals are assigned to reviewers by an NSF Program Officer.

Table 1 Proposal Review Applications

See Accessing Proposal Review.

Accessing Proposal Review

Role	What You Need for Access	Registration Required?
Reviewer	• Proposal number from NSF Program Officer • Proposal PIN from NSF Program Officer	No

Figure 1 Proposal Review Home Page screen.

Panelist Functions

Panelist Functions

Panelists are qualified individuals NSF calls upon to deliberate and provide advice as a group to the program officer on funding recommendations for a set of proposals (Table 1).

Table 1 Panelist Functions Applications

Application	Who	Activity
Interactive Panel System	Panel member	Work with fellow participants in a virtual conference or in a meeting at NSF, or a combination of both, to review proposals and make recommendations for their funding priority. (NSF appoints a Lead Panelist, who presents the proposals to the meeting, and a panel Scribe, who drafts the final Summary of the deliberations and conclusions reached by the panel.)
Panel Review System		Prepare and submit a review of a proposal that is before the meeting.
Travel and Reimbursement System		• Make travel arrangements to attend a meeting at NSF. • Submit requests for NSF reimbursement of costs incurred for travel to the meeting.

See Accessing Panelist Functions.

Panelist Functions

Panelists are qualified individuals NSF calls upon to deliberate and provide advice as a group to the program officer on funding recommendations for a set of proposals (Table 1).

Table 1 Panelist Functions Applications

Application	Who	Activity
Interactive Panel System	Panel member	Work with fellow participants in a virtual conference or in a meeting at NSF, or a combination of both, to review proposals and make recommendations for their funding priority. (NSF appoints a Lead Panelist, who presents the proposals to the meeting, and a panel Scribe, who drafts the final Summary of the deliberations and conclusions reached by the panel.)
Panel Review System		Prepare and submit a review of a proposal that is before the meeting.
Travel and Reimbursement System		• Make travel arrangements to attend a meeting at NSF. • Submit requests for NSF reimbursement of costs incurred for travel to the meeting.

See Accessing Panelist Functions.

Accessing Panelist Functions

Role	What You Need for Access	Registration Required?
Panelist	• Panel ID from NSF • Password from NSF	No

Figure 1 Panelist Functions Home Page screen.

Research Administration

Research Administration

Research Administration is the module where the Sponsored Project Office, the Authorized Organizational Representative, and the Financial Administrator of a registered organization conduct transactions with NSF and manage organizational activities (Table 1).

Working in Research Administration requires registration with FastLane.

Roles

The following persons work in Research Administration:

- ***Sponsored Project Office (SPO)***

  The individual or group at your organization responsible for management of FastLane and/or Research.gov functions

- ***Authorized Organizational Representative (AOR)***

  Theadministrative official who on behalf of the proposing organization is empoweredto make certifications and assurances and can commit the organization to the conduct of a project that NSF is being asked to support as well as to adhere tovarious NSF policies and grant requirements

Table 1 Research Administration Applications

Application	Who	Activity
Accounts Management	Institutional Administrator and SPO and other users with permissions to carry out any one or more of these activities	• Register new users with NSF. • Set passwords. • Assign user permissions. • Assign Financial Administrator Permissions.
Letters of Intent	SPO/AOR and other users with permissions to carry out any one or more of these activities	• Prepare a Letter of Intent in response to an NSF solicitation. • Return a forwarded Letter of Intent to the PI.
	AOR	Submit forwarded and SPO authored Letters of Intent to NSF
Proposals/File Updates/Supplements/ Withdrawals	SPO/AOR and other users with permissions to carry out any one or more of these activities	• Edit forwarded proposals, Proposal File Updates, Supplemental Funding Requests, and Withdrawals. • Return forwarded documents to PI.
	AOR	Electronically sign and submit and provide the required certifications for forwarded Proposals, Proposal File Updates, Supplemental Funding Requests and Withdrawals.
Award Documents	SPO/AOR and other users with permissions to carry out any one or more of these activities	View and print award documents, including cooperative agreements.
Forwarded/Submitted Revised Budgets	SPO/AOR and other users with permissions to carry out any one or more of these activities	• Edit forwarded revised budget to NSF. • Return a forwarded revised budget to PI
	AOR	Electronically sign and submit and provide the required certifications for forwarded revised budgets to NSF

Notifications and Requests	SPO/AOR and other users with permissions to carry out any one or more of these activities	• Prepare notifications and requests for changes in an award. • Return forwarded requests to the PI. (See the *Proposal & Award Policies & Procedures Guide (PAPPG)* Exhibit VII-1 for details on notifications and requests.)
	AOR	Electronically sign and submit, and provide the required certifications for notifications and requests for changes in an award
Organizational Reports	SPO/AOR and other users with permissions to carry out any one or more of these activities	• View active awards documents. • View the organization permissions report. • View the list of submitted documents waiting for electronic signature. • Check the status of recent proposals. • Check continuation funding. • Check submission of final project reports for an expired award.

Research Administration

Research Administration is the module where the Sponsored Project Office, the Authorized Organizational Representative, and the Financial Administrator of a registered organization conduct transactions with NSF and manage organizational activities (Table 1).

Working in Research Administration requires registration with FastLane.

Accessing Research Administration

Role	What You Need for Access	Registration Required?
Sponsored Project Office (SPO) Representative	Initial password from registration email from NSF	Yes
• Authorized Organizational Representative (AOR) • Financial Administrator	Initial password from SPO	

Figure 1 Research Administration Home Page screen.

Graduate Research Fellowship Program

Graduate Research Fellowship Program

The Graduate Research Fellowship Program is the module where individuals in graduate studies apply for grants and where Coordinating Officials submit reports on NSF Graduate Research Fellowships on their campus (Table 1).

Roles

The following persons work in the Graduate Research Fellowship Program:

- **Applicant**
  Individual in graduate studies who is seeking a research grant from NSF
- **Letter of Reference Writer**
  Individual who writes and submits a letter of reference for an applicant
- **Fellow**
  Individual with a Graduate Research Fellowship who is now a Fellow
- **Coordinating Official**
  University official who is assigned by the university via the SPO to manage the NSF Postgraduate fellows at the university

Table 1 Graduate Research Fellowship Program Applications

Application	Who	Activity
Prepare Application	Graduate Applicant	• Apply for a Graduate Research Fellowship. Manage references. • Manage your user profile.
Coordinate Applicant Awards	Coordinating Official	• Prepare reports on graduate researcher activities. • Coordinate grant administration.

See Accessing the Graduate Research Fellowship Program.

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  Individual who writes and submits a letter of reference for an applicant
- **Fellow**
  Individual with a Graduate Research Fellowship who is now a Fellow
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Table 1 Graduate Research Fellowship Program Applications

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Coordinate Applicant Awards	Coordinating Official	• Prepare reports on graduate researcher activities. • Coordinate grant administration.

See Accessing the Graduate Research Fellowship Program.

Accessing the Graduate Research Fellowship Program

Role	What You Need	Registration Required?
• Graduate Researcher • GRFP Official	Registration on **Graduate Research Fellowship Program** home page screen for login account and password	Registration only for Graduate Research Fellowship Program

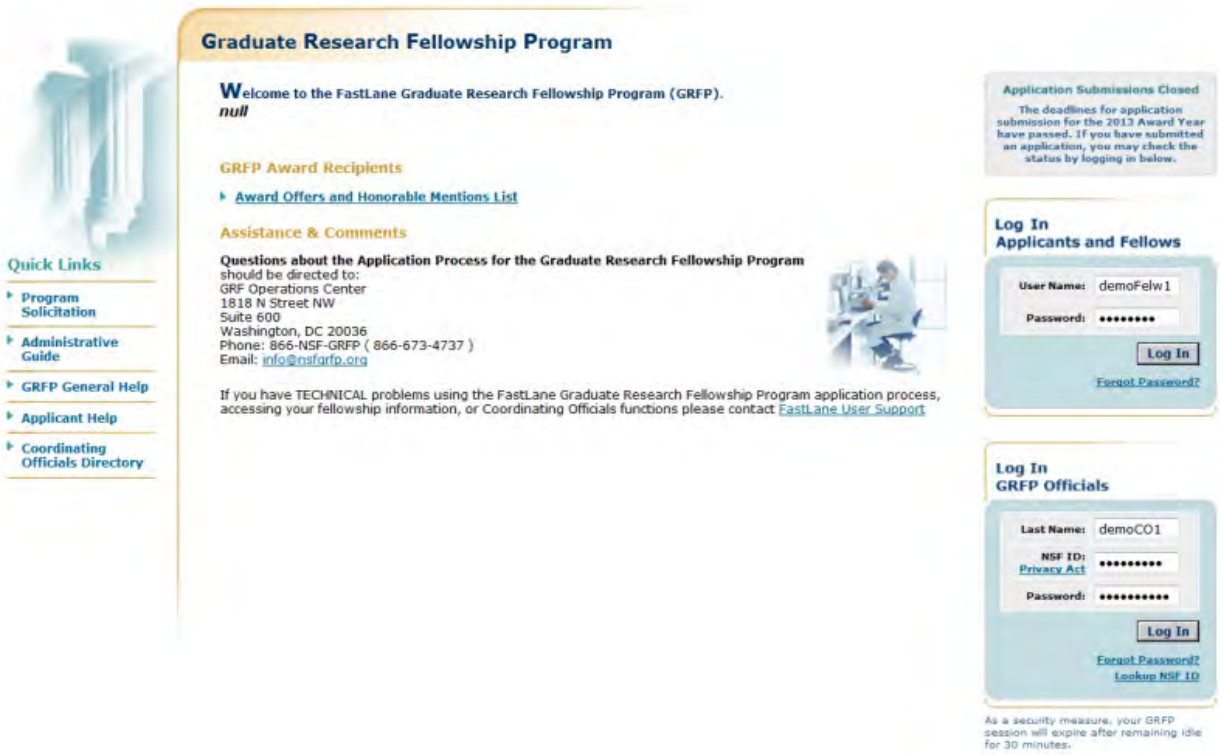

Figure 1 Graduate Research Fellowship Program Home Page screen.

Honorary Awards

Honorary Awards

In the Honorary Awards module, an individual submits a new nomination or writes and submits a reference for an already-submitted nominee for any of the following awards:

- **Alan T. Waterman Award**
  Annual award to recognize an outstanding young researcher in any field of science or engineering supported by the National Science Foundation
- **National Medal of Science**
  Award to individuals "deserving of special recognition by reason of their outstanding contributions to knowledge in the physical, biological, mathematical, engineering, or social and behavioral sciences"
- **Vannevar Bush Award**
  Annual award to recognize an individual who, through public service activities in science and technology, has made an outstanding "contribution toward the welfare of mankind and the nation"
- **National Science Board Public Service Award**
  Annual award to recognize people and organizations who have increased the public understanding of science or engineering

See Accessing Honorary Awards.

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  Award to individuals "deserving of special recognition by reason of their outstanding contributions to knowledge in the physical, biological, mathematical, engineering, or social and behavioral sciences"
- **Vannevar Bush Award**
  Annual award to recognize an individual who, through public service activities in science and technology, has made an outstanding "contribution toward the welfare of mankind and the nation"
- **National Science Board Public Service Award**
  Annual award to recognize people and organizations who have increased the public understanding of science or engineering

See Accessing Honorary Awards.

Accessing Honorary Awards

Figure 1 Honorary Awards Home Page screen. The Register Here link for Honorary Awards and the "Register and create your Honorary Awards user account" text link is circled.

Postdoctoral Fellowship and Other Programs

Postdoctoral Fellowship and Other Programs

Postdoctoral Fellowship and Other Programs is the module where applicants and sponsoring scientists acquire an overview of the postdoctoral programs NSF offers (Table 1).

Working in Postdoctoral Fellowship and Other Programs does not require registration with FastLane; however, preparing and submitting a proposal for a postdoctoral fellowship does require registration with FastLane.

Roles

The following persons work in Proposals, Awards, and Status:

- **Applicant**
  Individual with a doctoral degree who is seeking funding for a research project under the aegis of an NSF program (see below for program listing)
- **Sponsoring Scientist**
- **Letter of Reference Writer**
  Individual who has been asked by an applicant to submit a letter of reference to NSF concerning the applicant and/or proposed Postdoctoral Fellowship project

Table 1 Postdoctoral Fellowship and Other Programs Applications

Application	Who	Activity
I am an Applicant	Applicant	Find the information on one of the postdoctoral and other programs, including instructions for applying.
I am a Sponsoring Scientist	Sponsoring Scientist	Find the information on one of the postdoctoral and other programs and special information for Sponsoring Scientists.
I am a Letter of Reference Writer	Letter of Reference Writer	Prepare and submit to NSF a Letter of Reference for a postdoctoral Fellowship applicant.
Individual Registration	Applicant	Register with FastLane as an individual (required for preparing a proposal for a Postdoctoral Fellowship).
PI/Co-PI Login Page	Applicant	Log in to Proposals, Awards, and Status to prepare a proposal, once you have registered with FastLane.
Available Programs	Applicant and Sponsoring Scientist	Find information on all available programs with Postdoctoral Fellowships.
Analysis of Available Programs		View analyses of available programs in PDF format for downloading.

See Accessing Postdoctoral Fellowship and Other Programs.

Postdoctoral Fellowship and Other Programs

Postdoctoral Fellowship and Other Programs is the module where applicants and sponsoring scientists acquire an overview of the postdoctoral programs NSF offers (Table 1).

Working in Postdoctoral Fellowship and Other Programs does not require registration with FastLane; however, preparing and submitting a proposal for a postdoctoral fellowship does require registration with FastLane.

Roles

The following persons work in Proposals, Awards, and Status:

- **Applicant**
  Individual with a doctoral degree who is seeking funding for a research project under the aegis of an NSF program (see below for program listing)
- **Sponsoring Scientist**
- **Letter of Reference Writer**
  Individual who has been asked by an applicant to submit a letter of reference to NSF concerning the applicant and/or proposed Postdoctoral Fellowship project

Table 1 Postdoctoral Fellowship and Other Programs Applications

Application	Who	Activity
I am an Applicant	Applicant	Find the information on one of the postdoctoral and other programs, including instructions for applying.
I am a Sponsoring Scientist	Sponsoring Scientist	Find the information on one of the postdoctoral and other programs and special information for Sponsoring Scientists.
I am a Letter of Reference Writer	Letter of Reference Writer	Prepare and submit to NSF a Letter of Reference for a postdoctoral Fellowship applicant.
Individual Registration	Applicant	Register with FastLane as an individual (required for preparing a proposal for a Postdoctoral Fellowship).
PI/Co-PI Login Page	Applicant	Log in to Proposals, Awards, and Status to prepare a proposal, once you have registered with FastLane.
Available Programs	Applicant and Sponsoring Scientist	Find information on all available programs with Postdoctoral Fellowships.
Analysis of Available Programs		View analyses of available programs in PDF format for downloading.

See Accessing Postdoctoral Fellowship and Other Programs.

Accessing Postdoctoral Fellowships and Other Programs

Role	What You Need	Registration Required?
Researcher Applicant	No password required, **but** to prepare and submit a proposal, you must work in Proposals, Awards, and Status, where registration is required.	No
Sponsoring Scientist	Initial password from applicant	No
Letter of Reference Writer	Initial password from applicant	No

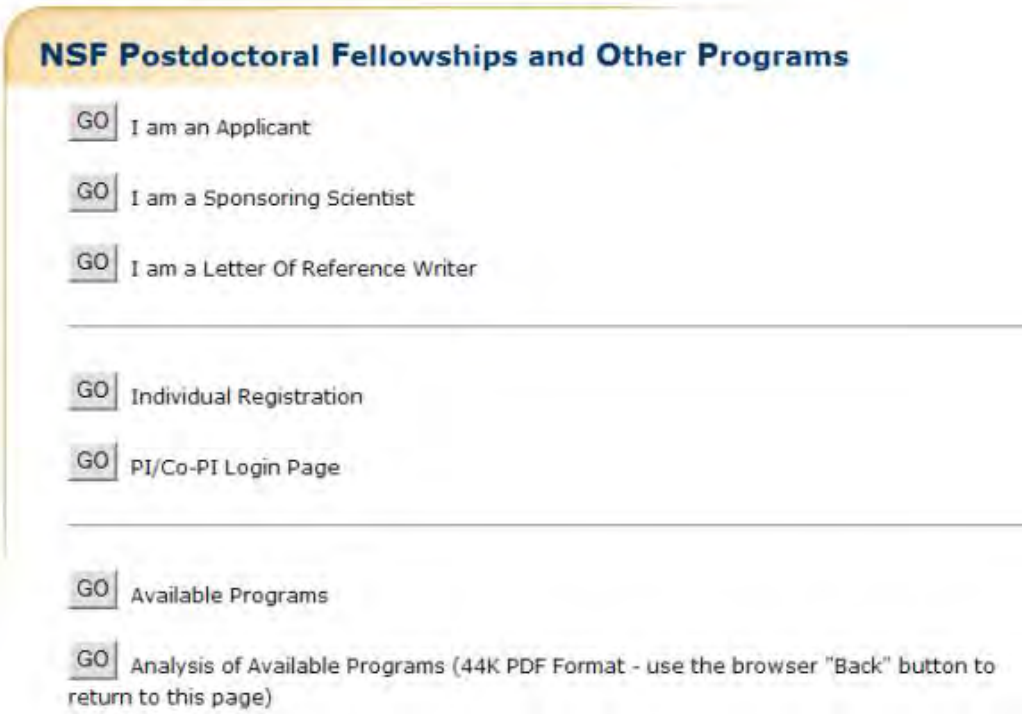

Figure 1 Postdoctoral Fellowships and Other Programs Home Page screen.

Glossary

AOR -Authorized Organizational Representative
Theadministrative official who, on behalf of the proposing organization is empowered to make certifications and assurances, to commit the organization to the conduct of a projectthat NSF is being asked to support, as well as adhere to various NSF policies and grant requirements.

DUNS Number - Data Universal Numbering System Number
The DUNS number is a nine-digit number assigned by Dun and Bradstreet Information Services. If your organization does not have a DUNS number, you may obtain one by callingDun and Bradstreet at (866) 705-5711 or at http://fedgov.dnb.com/webform

EDI - Electronic Data Interchange
An alternative format used to submit proposals to NSF. You must have permission from NSF to submit proposals using this format.

EFT- Electronic Fund Transfer
When the EFT information is submitted, it is transferred securely to the NSF financial management system for use in making payments to panelists and to organizations.

Financial Administrator
The FastLane user who has been given authority to grant Financial Functions permissions. Financial Users must now log into Research.gov to access the following Financial Services: Cash Requests, Cash Request History, Grantee EFT Update and Grantee EFT Update History

Proposal & Award Policies & Procedures Guide (PAPPG)
The NSF *Proposal &Award Policies & Procedures Guide (PAPPG)* contains NSF's proposal preparation and submission guidelines. Some NSF programs have program solicitations that modify the general

provisions of the PAPPG, and, in such cases, the guidelines provided in the solicitation must be followed.

*The **PAPPG** also* sets forth NSF policies and procedures regarding the award and management of grants and cooperative agreements and in conjunction with the award terms and conditions, implements 2 CFR §200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards.* If the PAPPG is silent on a specific area covered by 2 CFR200, the requirements specified in 2 CFR 200 must be followed. The PAPPG also implements other Public Laws, Executive Orders (E.O.) and other directives insofar as they apply to grants, and is issued pursuant to the authority of Section 11(a) of the NSF Act (42 USC §1870).

Password
A password is a 8-20 character authentication and access code used to log into PI/Co-PI Functions, Panelist Functions, Research Administration, Financial Functions, Honorary Awards, and the Graduate Research Fellowship Program. See Introduction to FastLane to learn how to obtain a password to access these functions.

PIN - Personal Identification Number
A six-character alphanumeric that reviewers use to access Proposal Review (see Accessing Proposal Review) and that an Other Authorized User uses to access Proposals, Awards, and Status (see Accessing Proposals, Awards, and Status).

PDF - PDF Portable Document Format
NSF converts your proposal and other documents that you create in FastLane into PDF files to ensure accurate viewing across all platforms. You need Adobe Reader to view any files that have already been submitted to NSF through FastLane (see Adobe Reader for FastLane). You can also create and upload your own PDF files to FastLane (see Generate PDF Files).

PI/co-PI - PrincipalInvestigator/Co-Principal Investogator(s)
The individual(s) designated by the proposer, and approved by NSF, who will be responsible for thescientific or technical direction of the project. See PAPPG Exhibit II-7 for furtherinformation. A proposal can have at most four Co-PIs. Other Senior Personnel can be added to the proposal as non Co-PI Senior Personnel.

SPO - Sponsored Projects Office
The individual or group at an organization responsible for management of FastLane or Research.gov functions.

FastLane Registration

FastLane Registration Introduction

Print contents of the Registration book.

Any organization or individual wanting to submit a proposal to the National Science Foundation (NSF) must be a registered organization or registered individual user with FastLane. But you cannot register an organization more than once; check if your organization is currently registered.

Note: Individuals submitting Postdoctoral Fellowship proposals must first register as a FastLane organization via NSF's FastLane Postdoctoral Fellowship Registration application (https://www.fastlane.nsf.gov/n1/N1IndvReg.html).

FastLane Contact/Sponsored Project Office (SPO)

And, if you are a registering organization, at the time of registration, you must register a point of contact, called a FastLane Contact/SPO; individuals, by default, are the registered FastLane Contact/SPO. (Once your organization registers a primary FastLane Contact/SPO, the primary FastLane Contact/SPO can in turn set up others [a secondary FastLane Contact/SPO] within the organization to perform all or individual FastLane Contact/SPO functions. See SPO Functions for instructions.)

Principal Investigator (PI)

A PI is the research lead for the NSF-funded project. The PI can be registered with NSF at the time the organization or individual registers with FastLane; or the PI can update the PI-specific information later.

Registration and Your Privacy

In order to protect the confidentiality of certain information, access to most FastLane features is limited to authorized users. Once you or your organization is registered, your FastLane Contact/SPO must enter a combination of information to prove their identity to gain access to the FastLane systems (usually his/her last name, password, and NSF ID). Review NSF's security and privacy policy for more information.

Registration Complete

Once you complete the registration process and are approved, you will be notified by email. Then, you or your organization can prepare and submit proposals.

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Registration Complete

Once you complete the registration process and are approved, you will be notified by email. Then, you or your organization can prepare and submit proposals.

Register an Organization

If your organization has never registered with FastLane, follow these steps to get registered.

1. Access the New Organization and FastLane Contact Registration application (Figure 1) in one of the following ways:

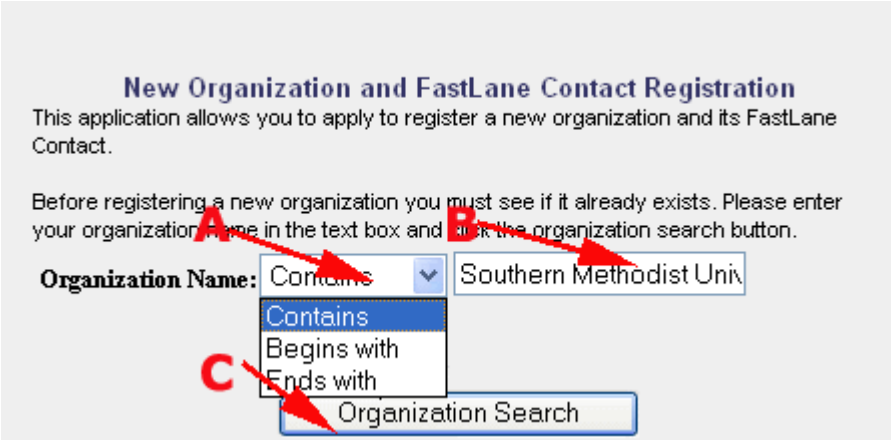

Figure 1 New Organization and FastLane Contact Registration screen.

a. Link directly to the application (https://www.fastlane.nsf.gov/n1/N1AddInst.html), or

b. Go through the FastLane homepage (www.fastlane.nsf.gov) using the following steps:

1. Go to the FastLane homepage (www.fastlane.nsf.gov) screen.

2. Click the **Registration Information** Quick Link on the left side of the page.

3. Scroll down the screen to **FastLane Organization Registration** section.

4. Click the **New Organization and FastLane Contact Registration** link

2. Ensure your organization is not registered by performing the following:

   a. Enter your organization's name in the Organization Name box (Figure 1 Section B).

   b. Select the search option from the drop-down box (Figure 1 Section A):

   - **Contains**
     Returns results for any registered organization whose registered name contains the text you entered.
   - **Begins with**
     Returns results for any registered organization whose registered name starts with the text you entered.
   - **Ends with**
     Returns results for any registered organization whose registered name ends with the text you entered.

   c. Click **Organization Search** button (Figure 1 Section C).

   If the **NSF Registered Organization(s)** screen displays, your organization is registered with NSF and is listed in the **Organization ID - Organization Name** box (Figure 2).

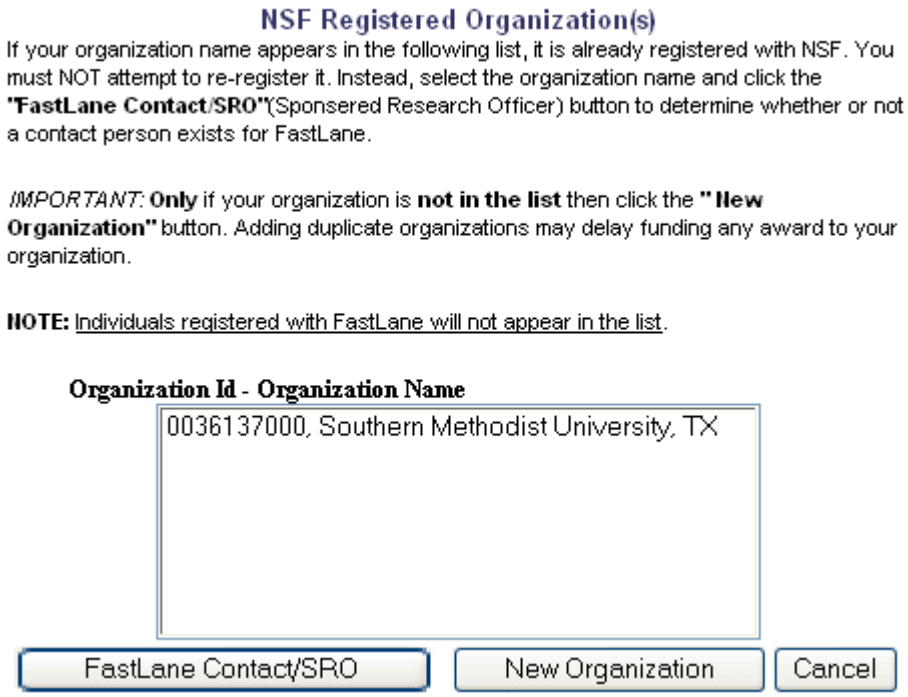

Figure 2 NSF Registered Organization(s) screen with the Organization ID box.

You do not need to do anything.

If your organization is not registered, you will see the **New Organization(s) Registration Request** screen displays (Figure 3);

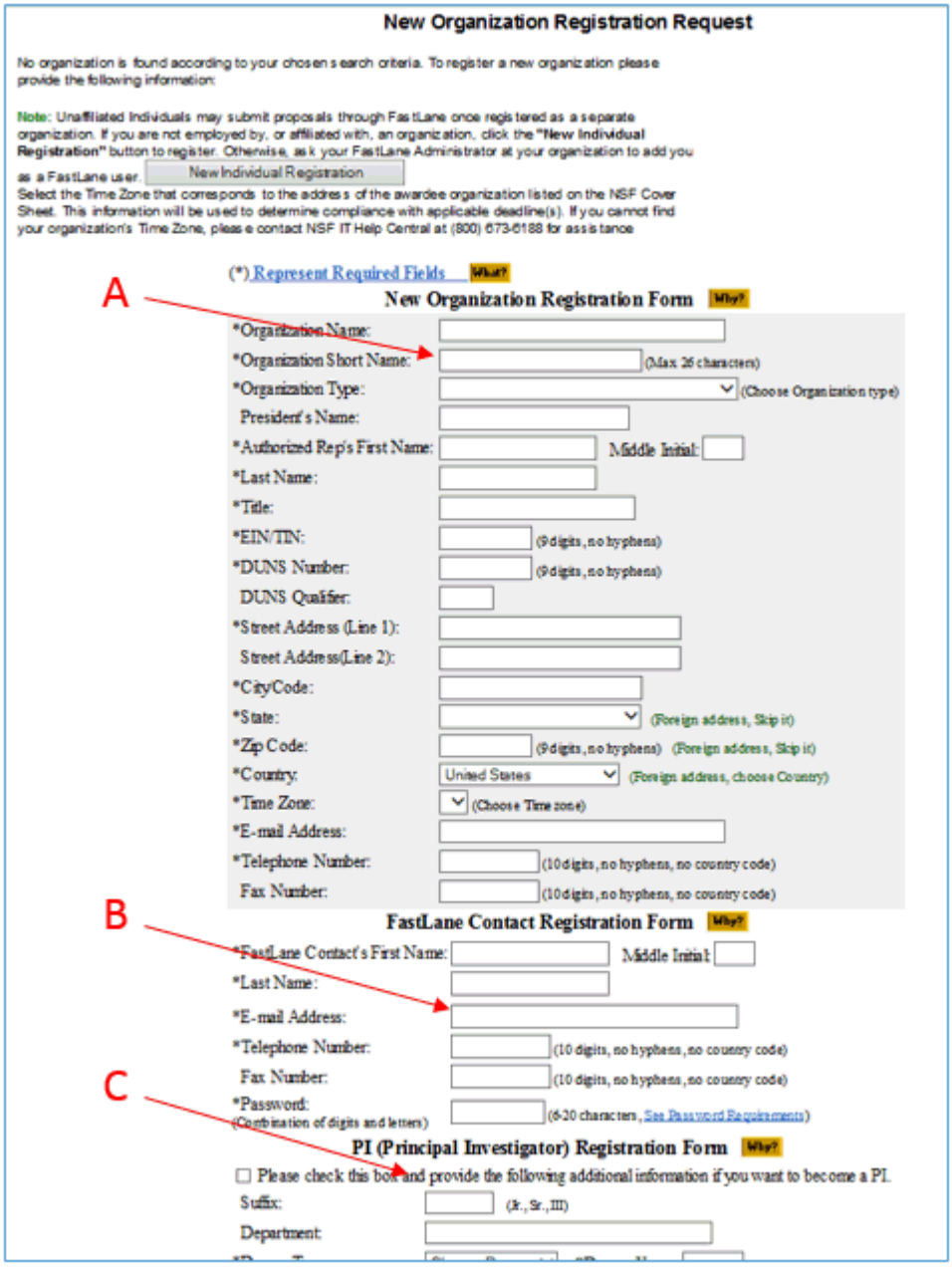

Figure 3 New Organization Registration Request screen.

continue with Step 3 to register.

3. Complete the **New Organization Registration Request** screen's **New Organization Registration Form** section's required fields [noted with an asterisk (*)] (Figure 3, section A).

4. Complete the **New Organization Registration Request** screen's **FastLane Contact Registration Form** section's required fields [noted with an asterisk (*)] (Figure 3, section B).
5. Complete the **New Organization Registration Request** screen's **PI (Principal Investigator) Registration Form** section's required fields [noted with an asterisk (*)] (**Figure 3, section C**).
6. Click the **Submit** button. The **Registration Request Submitted for Approval** screen returns.
7. Click the browser's print button to print the form.
8. Sign the form on the **Authorized Representative's Signature** line.
9. Date the form on the **Signed on** line.
10. Submit the completed form to the National Science Foundation in one of the following ways:
    - **Mail** National Science Foundation
      ATTN: FastLane Registration, Room 357
      4201 Wilson Boulevard
      Arlington VA 22230
    - **FAX**
      703-292-9281 or 703-292-9003
    - **Email**
      Scan and email as an attachment to fastlane@nsf.gov
11. Click **Continue**.

Check If an Organization Is Registered

To see if your organization is registered, do the following:

1. Access the New Organization and FastLane Contact Registration application (Figure 1) in one of the following ways:

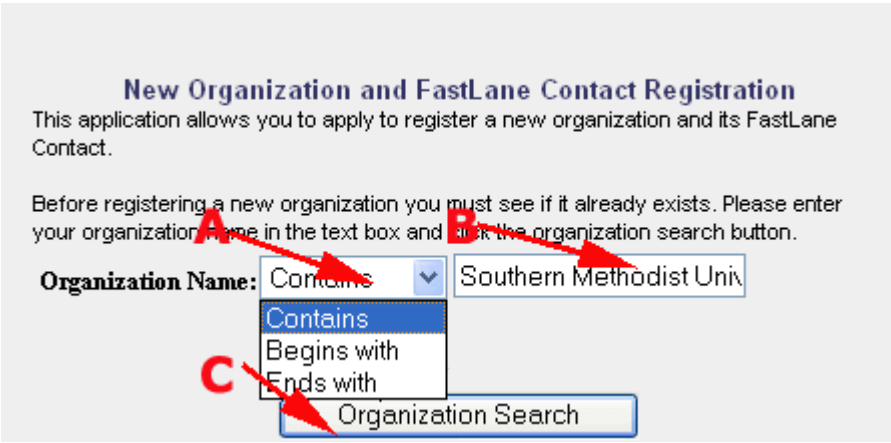

Figure 1 New Organization and FastLane Contact Registration screen.

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b. Go through the FastLane homepage (www.fastlane.nsf.gov) using the following steps:

1. Go to the FastLane homepage (www.fastlane.nsf.gov) screen.
2. Click the **Registration Information** Quick Link on the left side of the screen.
3. Scroll down the screen to **FastLane Organization Registration** section.
4. Click the **New Organization and FastLane Contact Registration** link.

2. Search for the organization by doing the following:

a. Enter your organization's name in the Organization Name box (Figure 1, Section B).

b. Select the search option from the drop-down box (Figure 1, Section A):

- **Contains**
  Returns results for any registered organization whose registered name contains the text you entered.
- **Begins with**
  Returns results for any registered organization whose registered name starts with the text you entered.
- **Ends with**
  Returns results for any registered organization whose registered name ends with the text you entered.

c. Click **Organization Search** button (Figure 1, Section C).

If the **NSF Registered Organization(s)** screen returns, your organization is registered with NSF and is listed in the **Organization ID - Organization Name** box (Figure 2).

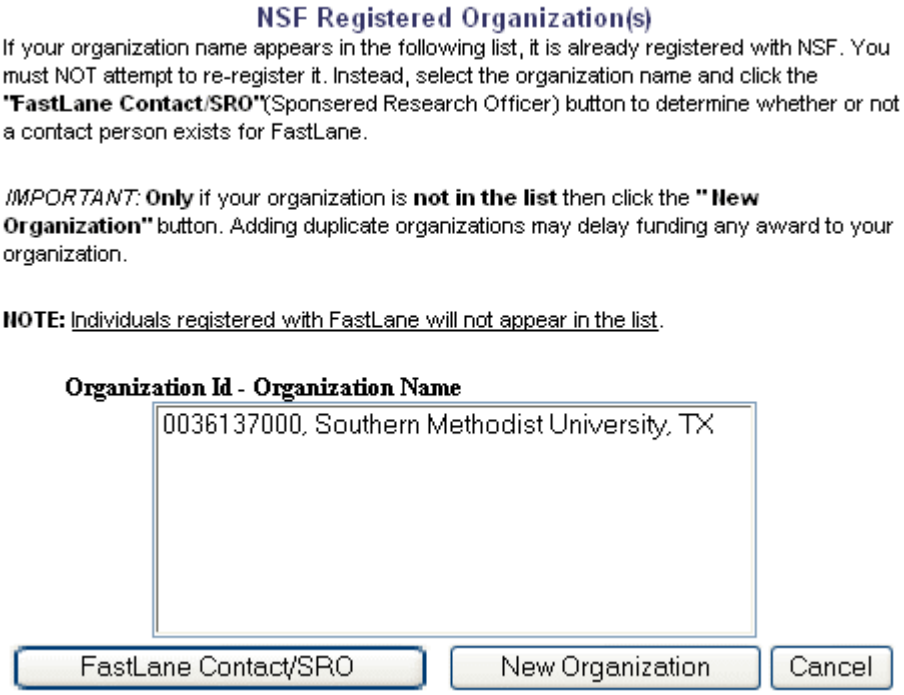
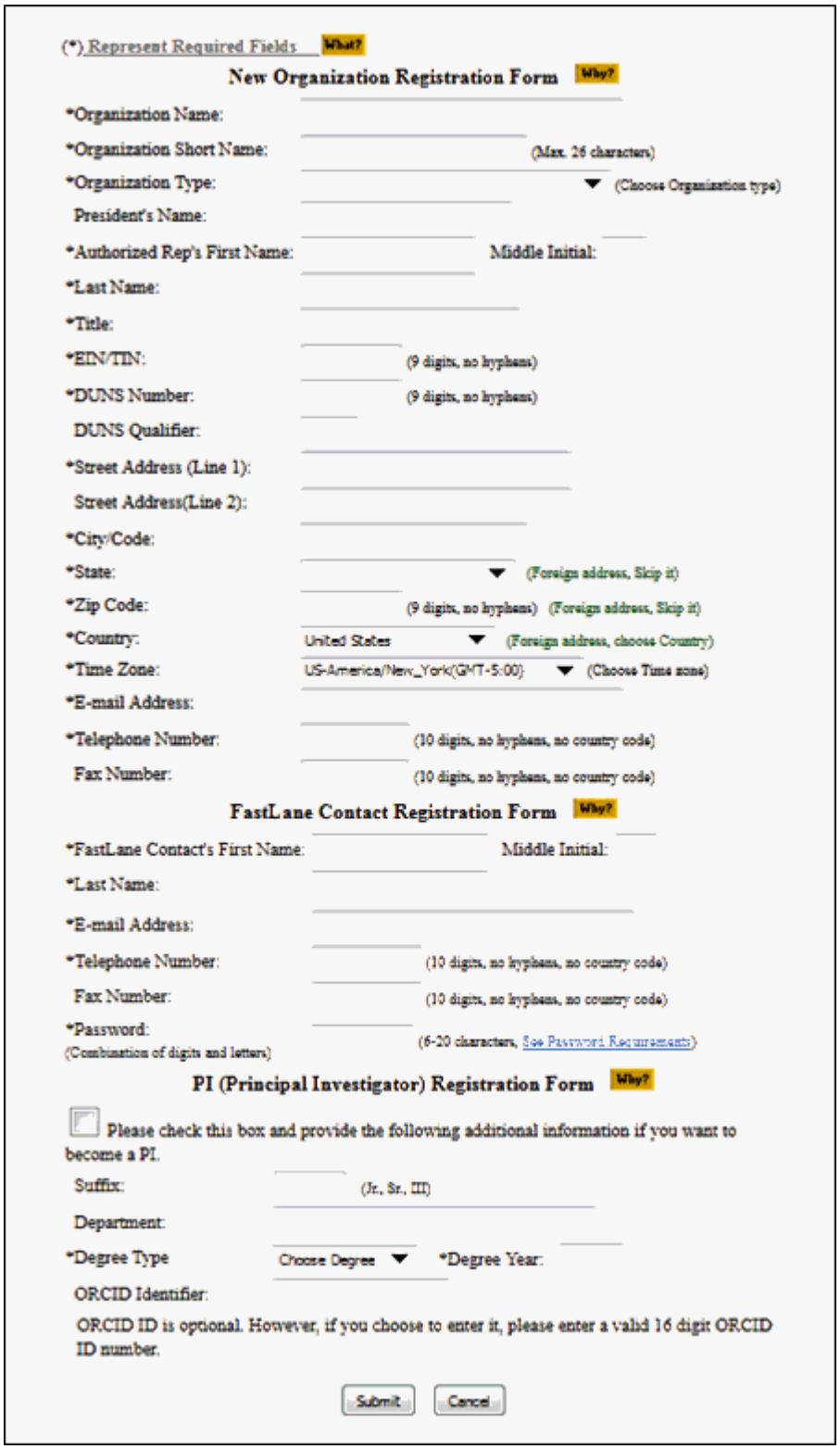


Figure 2 NSF Registered Organization(s) screen with the Organization ID box.

You do not need to do anything.

If your organization is not registered, you will see the **New Organization(s) Registration Request** screen (Figure 3).



(*) Represent Required Fields What?

New Organization Registration Form Why?

*Organization Name:

*Organization Short Name: (Max. 26 characters)

*Organization Type: (Choose Organization type)

President's Name:

*Authorized Rep's First Name: Middle Initial:

*Last Name:

*Title:

*EIN/TIN: (9 digits, no hyphens)

*DUNS Number: (9 digits, no hyphens)

DUNS Qualifier:

*Street Address (Line 1):

Street Address(Line 2):

*City/Code:

*State: (Foreign address, Skip it)

*Zip Code: (9 digits, no hyphens) (Foreign address, Skip it)

*Country: United States (Foreign address, choose Country)

*Time Zone: US-America/New_York(GMT-5:00) (Choose Time zone)

*E-mail Address:

*Telephone Number: (10 digits, no hyphens, no country code)

Fax Number: (10 digits, no hyphens, no country code)

FastLane Contact Registration Form Why?

*FastLane Contact's First Name: Middle Initial:

*Last Name:

*E-mail Address:

*Telephone Number: (10 digits, no hyphens, no country code)

Fax Number: (10 digits, no hyphens, no country code)

*Password: (6-20 characters, See Password Requirements)
(Combination of digits and letters)

PI (Principal Investigator) Registration Form Why?

Please check this box and provide the following additional information if you want to become a PI.

Suffix: (Jr., Sr., III)

Department:

*Degree Type Choose Degree *Degree Year:

ORCID Identifier:

ORCID ID is optional. However, if you choose to enter it, please enter a valid 16 digit ORCID ID number.

Submit Cancel

Figure 3 New Organization Registration Request screen.

See Register an Organization for instructions on completing the registration process.

Register an Individual

To register as an individual in FastLane, do the following:

1. Access the **New Organization Registration Request** screen (Figure 1) (see Register an Organization, Steps 1 and 2). (You can type your name in the Search function).

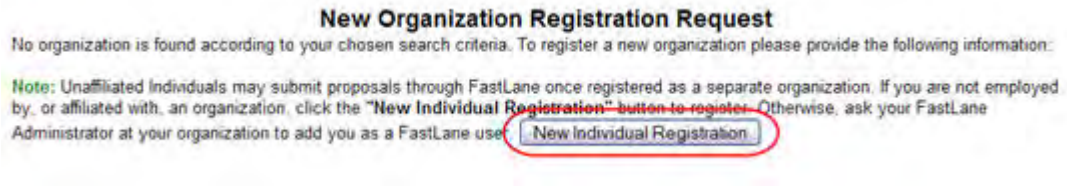
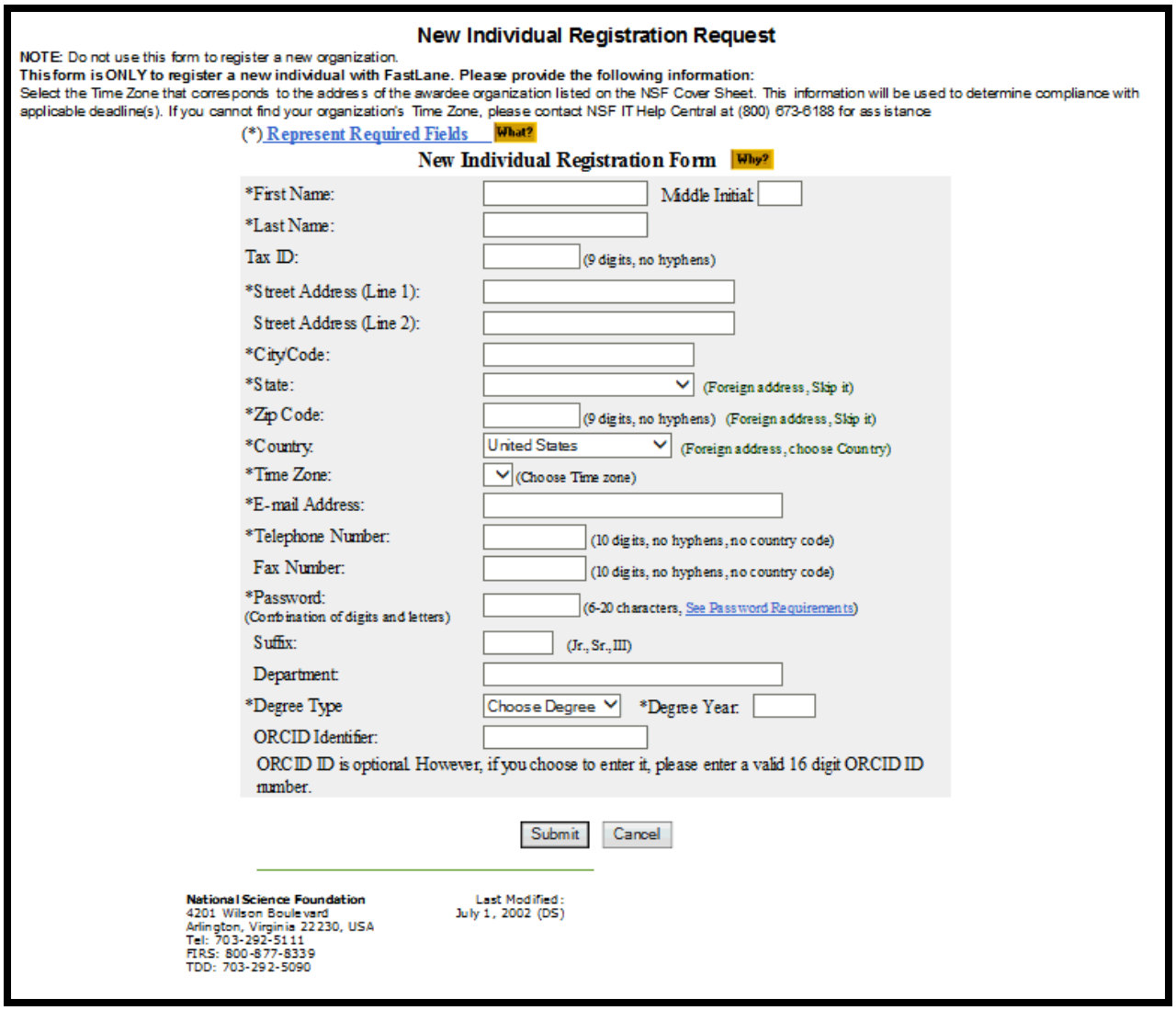


Figure 1 New Organization Registration Request screen (upper portion). The New Individual Registration button is circled.

2. On the **New Organization Registration Request** screen (Figure 1), click the **New Individual Registration** button. The **New Individual Registration Request** screen displays (Figure 2).



New Individual Registration Request

NOTE: Do not use this form to register a new organization.
This form is ONLY to register a new individual with FastLane. Please provide the following information:
Select the Time Zone that corresponds to the address of the awardee organization listed on the NSF Cover Sheet. This information will be used to determine compliance with applicable deadline(s). If you cannot find your organization's Time Zone, please contact NSF IT Help Central at (800) 673-6188 for assistance

(*) Represent Required Fields What?

New Individual Registration Form Why?

*First Name: Middle Initial:
*Last Name:
Tax ID: (9 digits, no hyphens)
*Street Address (Line 1):
Street Address (Line 2):
*City/Code:
*State: (Foreign address, Skip it)
*Zip Code: (9 digits, no hyphens) (Foreign address, Skip it)
*Country: United States (Foreign address, choose Country)
*Time Zone: (Choose Time zone)
*E-mail Address:
*Telephone Number: (10 digits, no hyphens, no country code)
Fax Number: (10 digits, no hyphens, no country code)
*Password: (Combination of digits and letters) (6-20 characters, See Password Requirements)
Suffix: (Jr., Sr., III)
Department:
*Degree Type Choose Degree *Degree Year:
ORCID Identifier:
ORCID ID is optional. However, if you choose to enter it, please enter a valid 16 digit ORCID ID number.

Submit Cancel

National Science Foundation
4201 Wilson Boulevard
Arlington, Virginia 22230, USA
Tel: 703-292-5111
FIRS: 800-877-8339
TDD: 703-292-5090

Last Modified:
July 1, 2002 (DS)

Figure 2 New Individual Registration Request screen.

3. Complete the **New Individual Registration Request** screen's **New Individual Registration Form** section's required fields [noted with an asterisk (*)] (Figure 2).
4. Click the **Submit** button. The **Registration Request Submitted for Approval** screen returns.
5. Click the browser's print button to print the form.
6. Sign the form on the **Authorized Representative's Signature** line.
7. Date the form on the **Signed on** line.
8. Submit the completed form to the National Science Foundation in one of the following ways:
   - **Mail**
     National Science Foundation
     ATTN: FastLane Registration, Room 357
     4201 Wilson Boulevard
     Arlington VA, 22230
   - **FAX**
     703-292-9281 or 703-292-9003

- **Email**
  Email as an attachment to fastlane@nsf.gov

Locate Your Organization's FastLane Contact/Sponsored Project Office (SPO)

To determine if your organization has a registered FastLane Contact/SPO, follows these steps:

1. Access the New Organization and FastLane Contact Registration application (Figure 1) in one of the following ways:

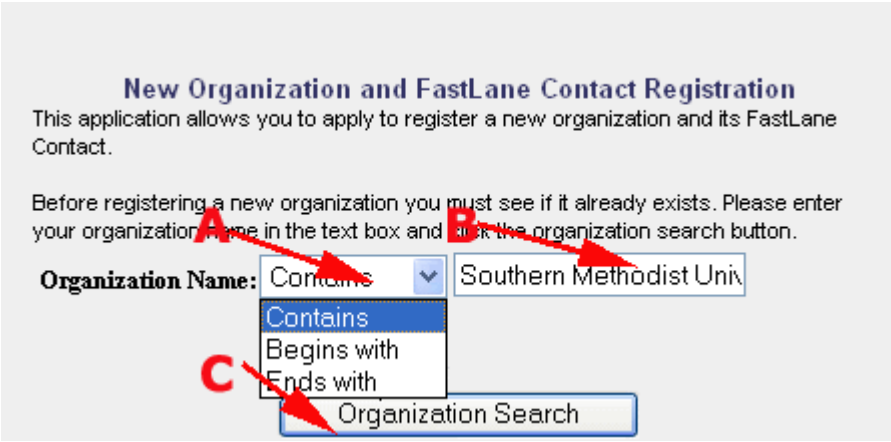


Figure 1 New Organization and FastLane Contact Registration screen.

a. Link directly to the application (https://www.fastlane.nsf.gov/n1/N1AddInst.html), or

b. Go through the FastLane homepage (www.fastlane.nsf.gov) using the following steps:

   1. Go to the FastLane homepage (www.fastlane.nsf.gov) screen.

   2. Click the **Registration Information** Quick Link on the left side of the screen.

   3. Scroll down the screen to **FastLane Organization Registration** section.

   4. Click the **New Organization and FastLane Contact Registration** link

2. Select your organization in the **Organization ID - Organization Name** box (Figure 1).
3. Click the **FastLane Contact** button. Your organization's FastLane Contact/SPO information is listed on the **FastLane Contact Information** (Figure 2) screen returned.

FastLane Contact Information

We have following information on the FastLane Contact of **Southwest Virginia Community College**.

FastLane Contact Name	Email	Phone Number	Fax Number
Phyllis Smith	phyllis.smith@sw.edu	2765557588	2765557588

Go to Homepage

Figure 2 FastLane Contact Information screen.

If your organization does not have a registered FastLane Contact/SPO, the **FastLane Contact Information** screen will indicate so (Figure 3).

FastLane Contact Information

Your organization does not have any FastLane Contact person.

To register a FastLane Contact for your organization please click the **"FastLane Contact"** button and provide the required information on the following screen.

FastLane Contact | Cancel

Figure 3 FastLane Contact Information screen.

You can register your organization's contact/SPO at any time.

Register the FastLane Contact SPO

An organization's FastLane Contact/Sponsored Project Office (SPO) contact is normally registered at the time the organization is registered.

However, if you do not know who your organization's contact is and the application indicated your organization doesn't have a contact registered, follow these steps to register a contact:

1. Determine that your registered organization does not have a FastLane/SPO registered.
2. Click the **FastLane Contact** button on the **FastLane Contact Information** screen (Figure 1).

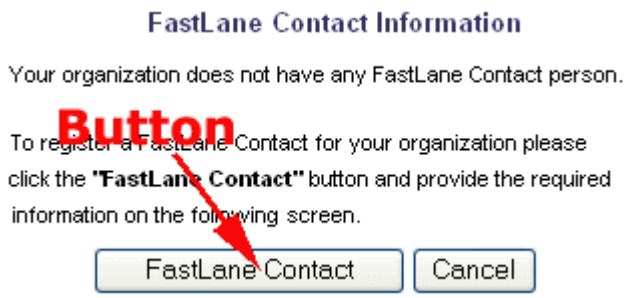


Figure 1 FastLane Contact Information with the FastLane Contact button shown.

3. Complete the **FastLane Contact Registration Request** screen's **FastLane Contact Registration Form**'s required fields (Figure 2).

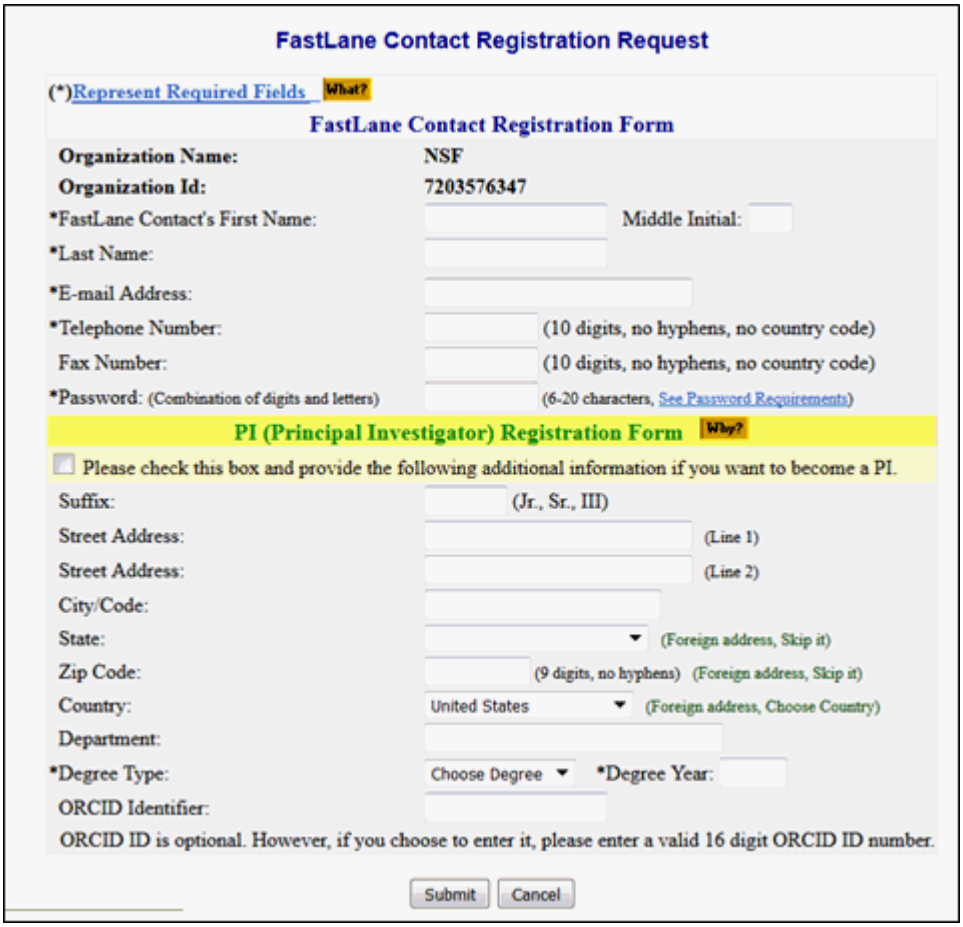
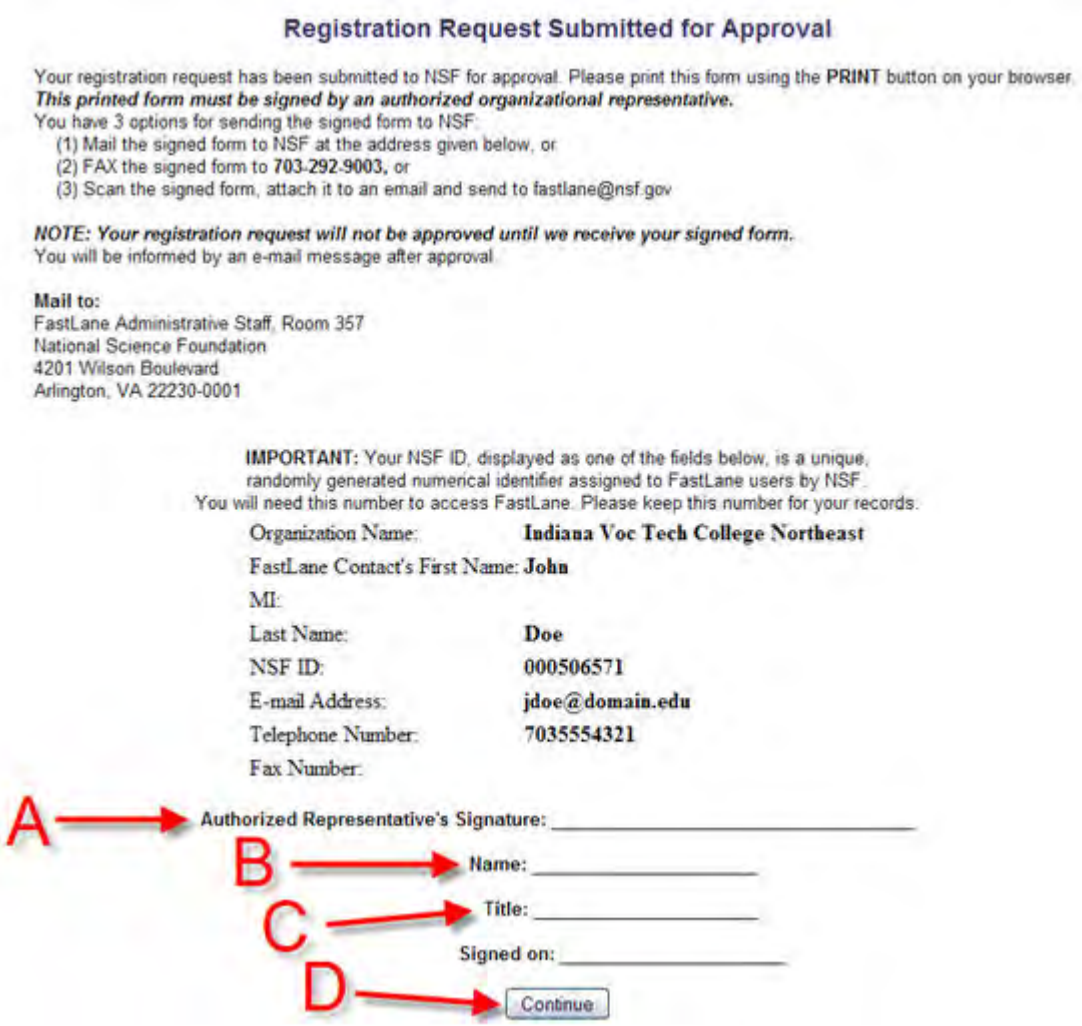


Figure 2 FastLane Contact Registration Request screen.

4. Complete the **FastLane Contact Registration Request** screen's **PI (Principal Investigator) Registration Form**'s required fields (Figure 2).
5. Click the **Submit** button. The **FastLane Contact Registration Request Submitted for Approval** screen returns.
6. Click the browser's print button to print the form.
7. Sign the form on the **Authorized Representative's Signature** line (Figure 3, Section A).



Registration Request Submitted for Approval

Your registration request has been submitted to NSF for approval. Please print this form using the **PRINT** button on your browser.
This printed form must be signed by an authorized organizational representative.
You have 3 options for sending the signed form to NSF:
(1) Mail the signed form to NSF at the address given below, or
(2) FAX the signed form to **703-292-9003**, or
(3) Scan the signed form, attach it to an email and send to fastlane@nsf.gov

NOTE: Your registration request will not be approved until we receive your signed form.
You will be informed by an e-mail message after approval.

Mail to:
FastLane Administrative Staff, Room 357
National Science Foundation
4201 Wilson Boulevard
Arlington, VA 22230-0001

IMPORTANT: Your NSF ID, displayed as one of the fields below, is a unique, randomly generated numerical identifier assigned to FastLane users by NSF. You will need this number to access FastLane. Please keep this number for your records.

Organization Name:	**Indiana Voc Tech College Northeast**
FastLane Contact's First Name:	**John**
MI:	
Last Name:	**Doe**
NSF ID:	**000506571**
E-mail Address:	**jdoe@domain.edu**
Telephone Number:	**7035554321**
Fax Number:	

Figure 3 Registration Request Submitted for Approval screen.

8. Print your name on the **Name** line (Figure 3, Section B).
9. Print your title on the **Title** line (Figure 3, Section C).
10. Submit the completed form to the National Science Foundation in one of the following ways:
    - **Mail**
      National Science Foundation
      ATTN: FastLane Registration, Room 357
      4201 Wilson Boulevard
      Arlington VA, 22230
    - **FAX**
      703-292-9281 or 703-292-9003
    - **Email**
      Email as an attachment to fastlane@nsf.gov

11. Click **Continue** (Figure 3, Section D).

Register a PI or Co-PI

An organization can designate a Principal Investigator (PI), or Co-PI, at the time the organization is registered.

However, an organization can register a PI, or add Co-PIs, after registering the organization. And, an organization can add as many individuals as a PI as needed. See Account Management for instructions.

Postdoctoral Fellowship Registration

To register as an independent researcher with the Postdoctoral Fellowship system, do the following:

Access the Postdoctoral Fellowship Registration system (https://www.fastlane.nsf.gov/n1/N1IndvReg.html) (Figure 1) in the following way:

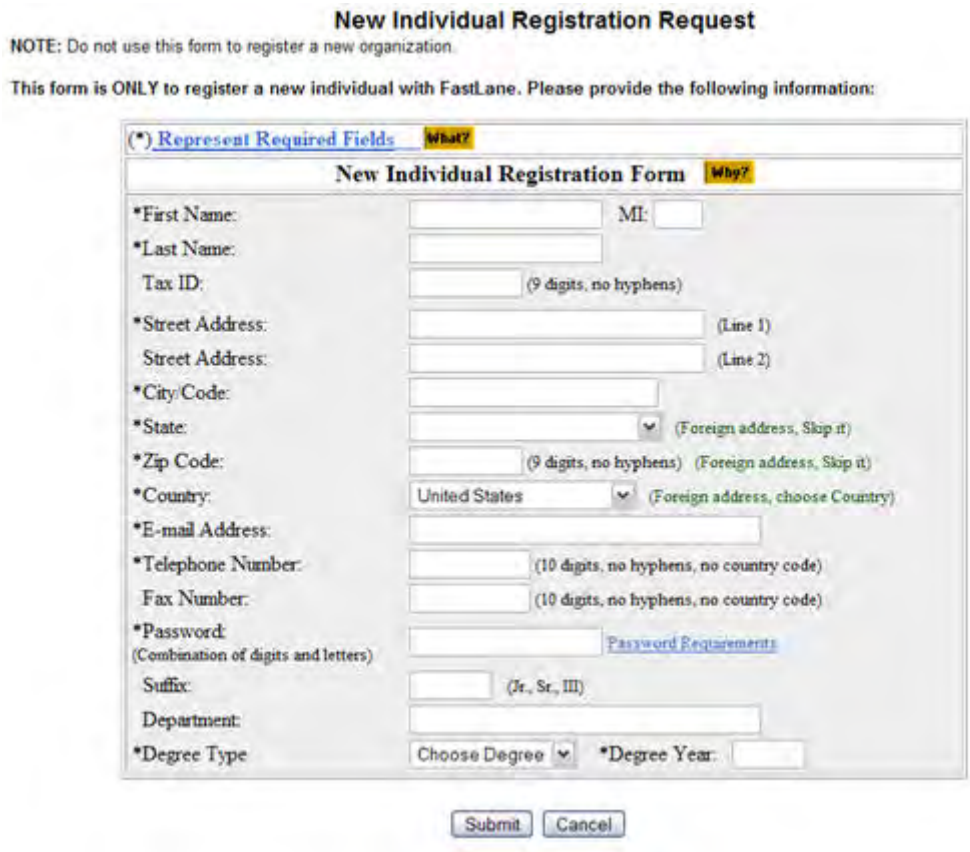


Figure 1 New Individual Registration Request screen.

Link directly to the application (https://www.fastlane.nsf.gov/n1/N1IndvReg.html). The **Postdoctoral Fellowship Registration** screen displays as in Figure 2.

Figure 2 Postdoctoral Fellowship Registration screen.

1. Select the **Continue** button (Figure 2). The **Rules of Behavior** screen displays (see Figure 3).

Figure 3 Rules of Behavior screen.

2. Check the **I have read and accept the Rules of Behavior** box on the **Rules of Behavior** screen.
3. Select the **Accept** button on the **Rules of Behavior** screen. The **New Individual Registration Request** screen displays (Figure 1).
4. Complete the **New Individual Registration Request** screen's required fields [noted with an asterisk (*)] as seen in Figure 4.

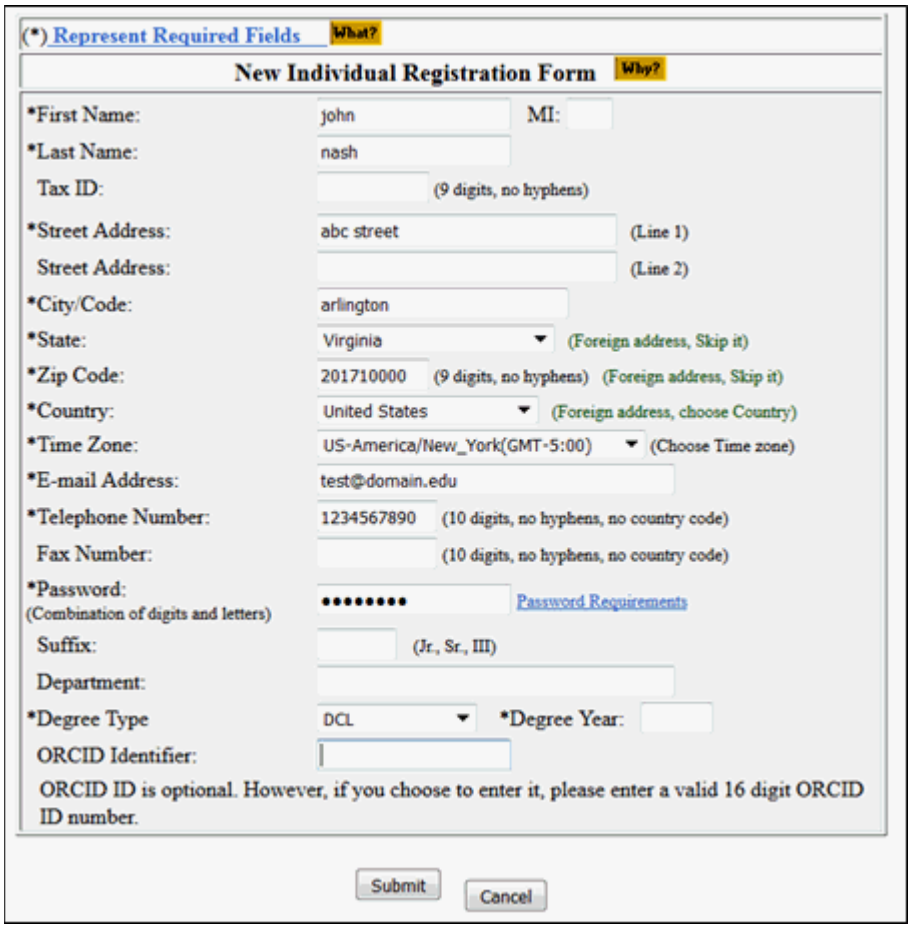
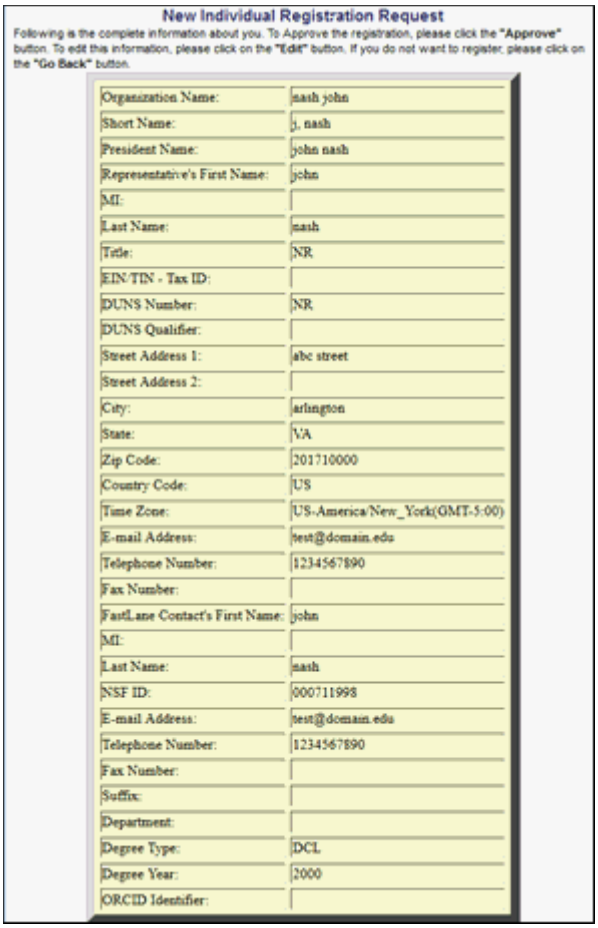


Figure 4 New Individual Registration Request screen.

5. Select the **Submit** button (Figure 4). The **New Individual Registration Request** screen returns with the information you entered (Figure 5).



New Individual Registration Request

Following is the complete information about you. To Approve the registration, please click the **"Approve"** button. To edit this information, please click on the **"Edit"** button. If you do not want to register, please click on the **"Go Back"** button.

Organization Name:	nash john
Short Name:	j. nash
President Name:	john nash
Representative's First Name:	john
MI:	
Last Name:	nash
Title:	NR
EIN/TIN - Tax ID:	
DUNS Number:	NR
DUNS Qualifier:	
Street Address 1:	abc street
Street Address 2:	
City:	arlington
State:	VA
Zip Code:	201710000
Country Code:	US
Time Zone:	US-America/New_York(GMT-5:00)
E-mail Address:	test@domain.edu
Telephone Number:	1234567890
Fax Number:	
FastLane Contact's First Name:	john
MI:	
Last Name:	nash
NSF ID:	000711998
E-mail Address:	test@domain.edu
Telephone Number:	1234567890
Fax Number:	
Suffix:	
Department:	
Degree Type:	DCL
Degree Year:	2000
ORCID Identifier:	

Figure 5 Fellowship Individual Registration screen with the form completed.

6. Select the **Approve** button (Figure 5). A screen displays (Figure 6) with a message that you are registered successfully.

New Organization, FastLane Contact and PI Registration is Successful

The applicant has been successfully registered in FastLane as a new organization, the FastLane Contact for the organization and as a PI. The FastLane Contact has been notified by an electronic mail message at the address: **john.doe@nsf.com** . Please click the continue button to complete the process.

Continue

Figure 6 Postdoctoral Registration confirmation screen.

7. Select the **Continue** button (Figure 6). The **FastLane Home Page** screen displays (Figure 7).

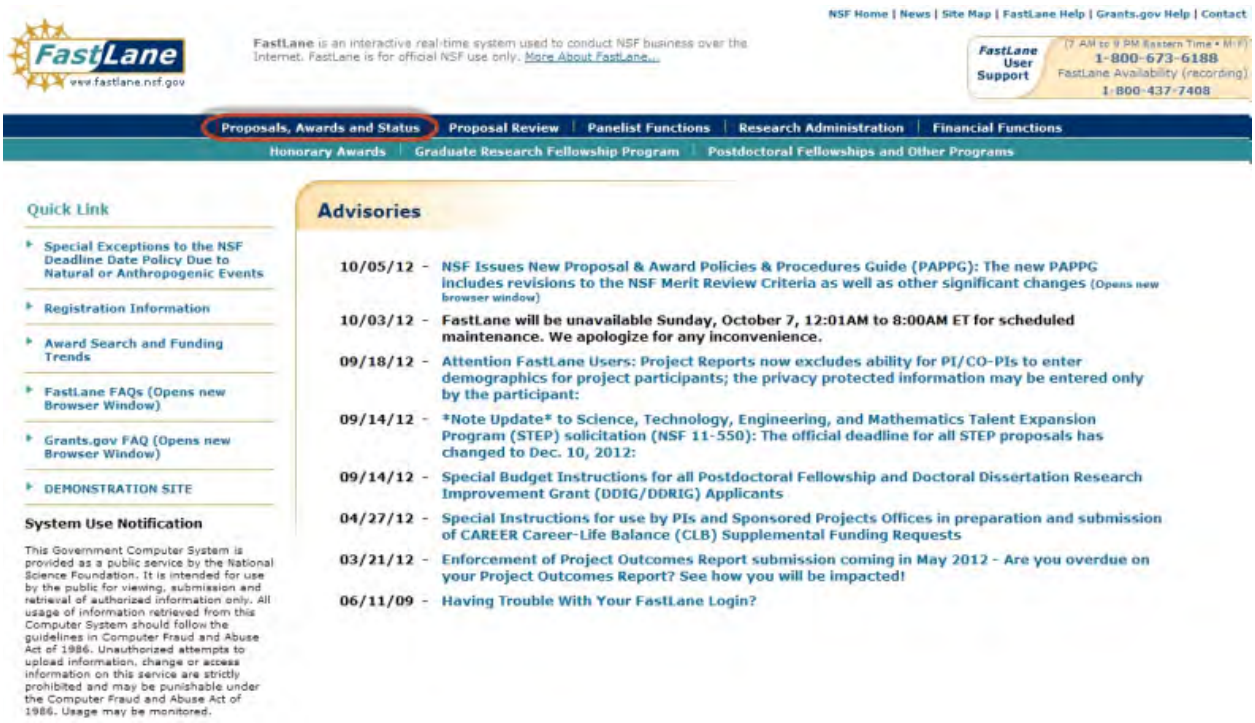


Figure 7 FastLane Home Page screen. Proposals, Awards and Status is circled in red.

8. Select Proposals, Awards and Status (as seen in Figure 7). The Proposals, Awards and Status screen displays (Figure 8).

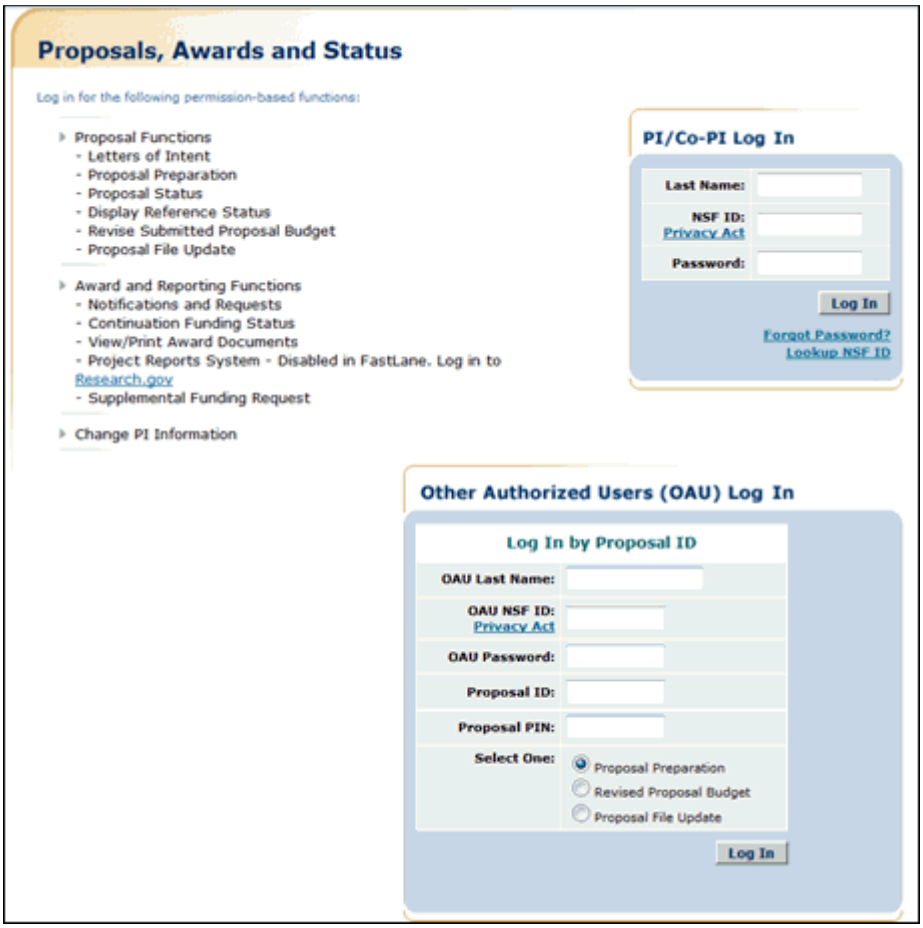


Figure 8 Proposals, Awards and Status screen. The PI/Co-PI login section is circled in red.

9. Complete the PI/Co-PI log in information (Figure 8). Select the **Log In** button. The first time you log in, you will be redirected to Research.gov to change your password. Once you reset your password in Research.gov use the updated password to login to FastLane.

10. Enter a new password and then select the **OK** button (Figure 9). The **What Do You Want To Work On?** screen displays (Figure 10).

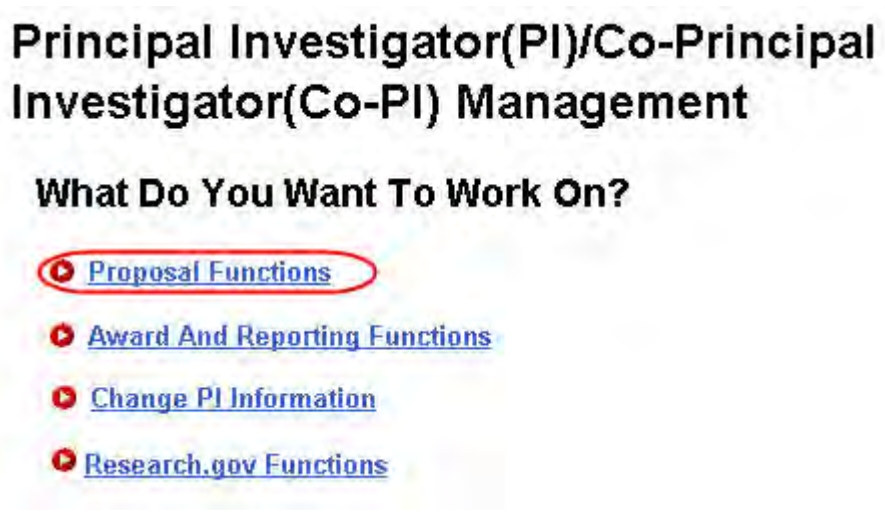


Figure 10 What Do You Want To Work On? screen. Proposal Functions is circled in red.

11. Select the **Proposal Functions** link. The **Proposal Functions** screen displays (Figure 11).

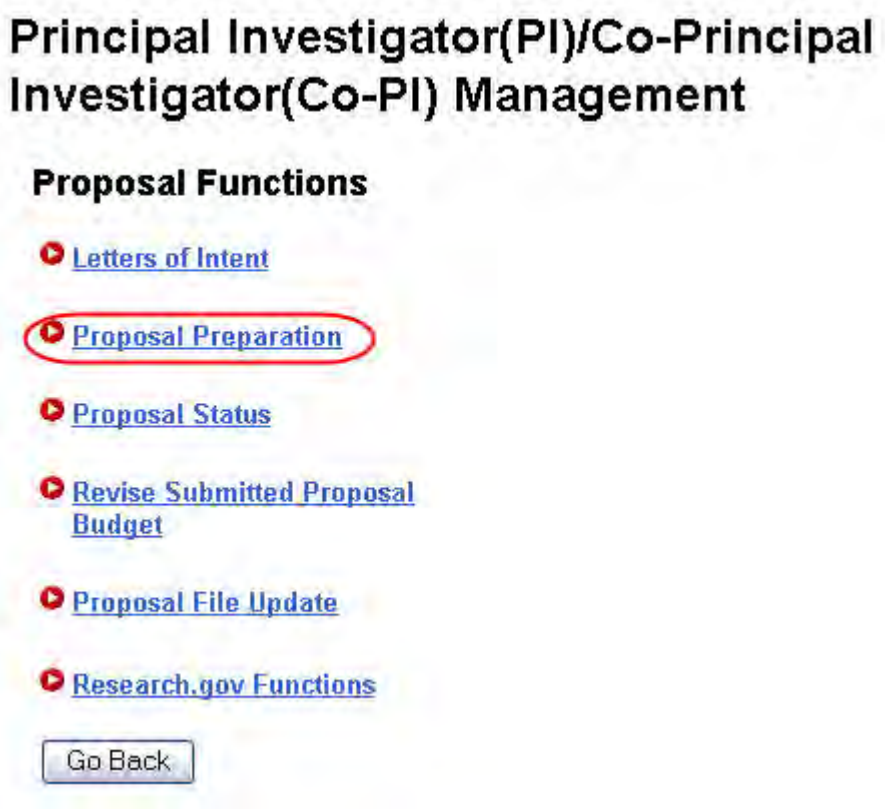
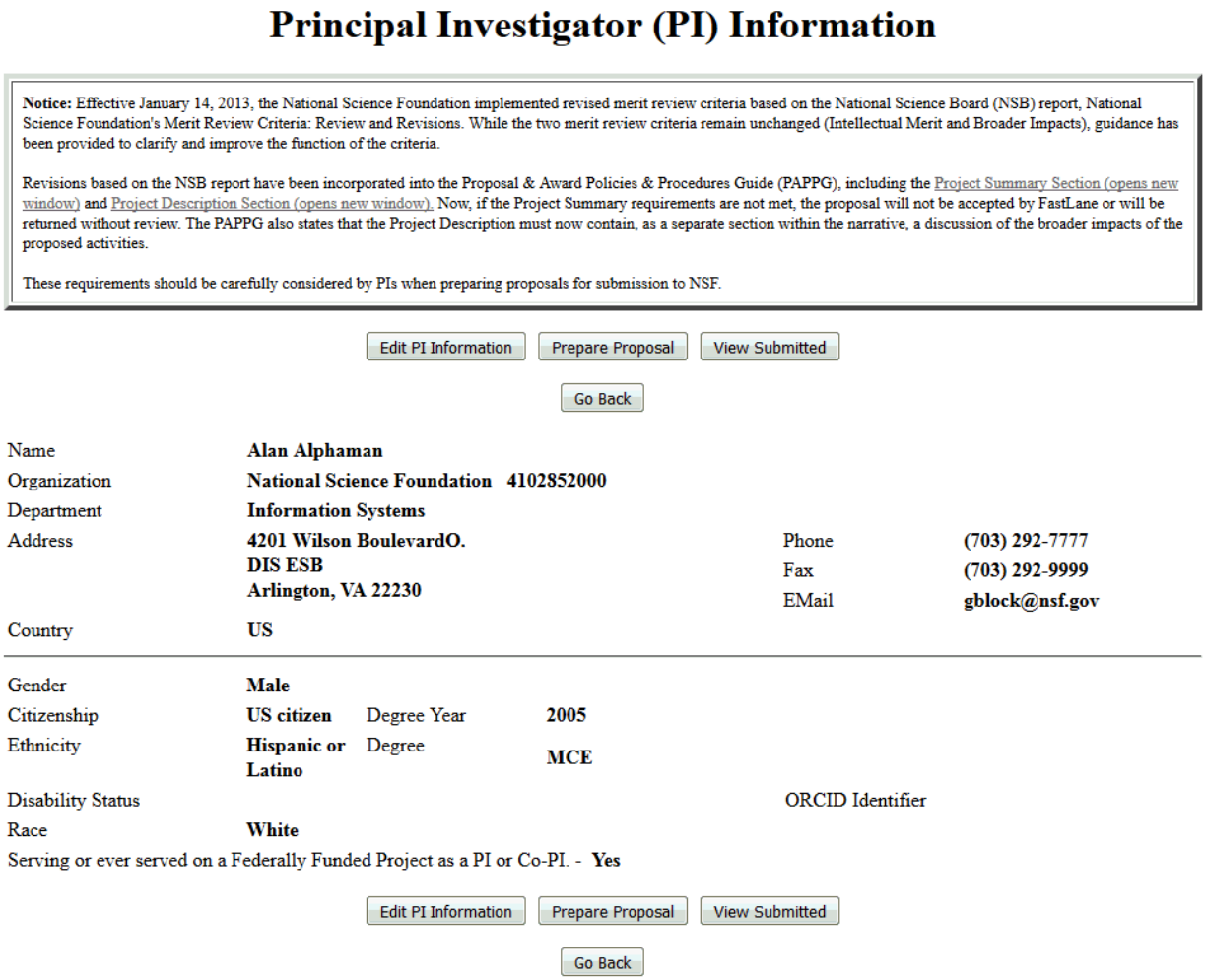


Figure 11 Proposal Functions screen. Proposal Preparation is circled in red.

12. Select the **Proposal Preparation** link (Figure 11). The **Principal Investigator (PI) Information** screen (Figure 12) displays.

13. On the **Principal Investigator (PI) Information** screen, scroll down and check your information. Your organization must have you listed as an individual researcher. Your organization code will begin with a "P."



Principal Investigator (PI) Information

Notice: Effective January 14, 2013, the National Science Foundation implemented revised merit review criteria based on the National Science Board (NSB) report, National Science Foundation's Merit Review Criteria: Review and Revisions. While the two merit review criteria remain unchanged (Intellectual Merit and Broader Impacts), guidance has been provided to clarify and improve the function of the criteria.

Revisions based on the NSB report have been incorporated into the Proposal & Award Policies & Procedures Guide (PAPPG), including the Project Summary Section (opens new window) and Project Description Section (opens new window). Now, if the Project Summary requirements are not met, the proposal will not be accepted by FastLane or will be returned without review. The PAPPG also states that the Project Description must now contain, as a separate section within the narrative, a discussion of the broader impacts of the proposed activities.

These requirements should be carefully considered by PIs when preparing proposals for submission to NSF.

Edit PI Information | Prepare Proposal | View Submitted

Go Back

Name	**Alan Alphaman**		
Organization	**National Science Foundation 4102852000**		
Department	**Information Systems**		
Address	**4201 Wilson BoulevardO.** **DIS ESB** **Arlington, VA 22230**	Phone Fax EMail	**(703) 292-7777** **(703) 292-9999** **gblock@nsf.gov**
Country	**US**		

Gender	**Male**		
Citizenship	**US citizen**	Degree Year	**2005**
Ethnicity	**Hispanic or Latino**	Degree	**MCE**
Disability Status		ORCID Identifier	
Race	**White**		

Serving or ever served on a Federally Funded Project as a PI or Co-PI. - **Yes**

Edit PI Information | Prepare Proposal | View Submitted

Go Back

Figure 12 Principal Investigator (PI) Information screen. The Organization code is circled in red.

14. Review your information (Figure 12). If it is not correct, select the **Edit** button and update your information. When you have completed the changes, select the **Save** button to continue.
15. See Prepare a Proposal for instructions on how to prepare a proposal for your selected fellowship.

See also:

- How to Apply (for Applicants)
- How to Apply (for Sponsoring Scientists)
- View Award-Specific Program Announcement
- Postdoctoral Fellowship Contacts

FastLane Password

FastLane Passwords Introduction

Upon registration, the FastLane Contact/SPO chooses a password that allows him/her to access all FastLane organizational applications. When an SPO adds an individual as a FastLane user, the SPO submits a password for that individual. The National Science Foundation (NSF) then emails the password to the new user.

Password Requirements

Passwords must consist of the following:

- Password length must be between 8 and 20 characters.
- The Password must contain at least three of the four rules:
- At least one lowercase letter
- At least one capital letter
- At least one number
- At least one of the following special characters #, &, %, !, @, (,)
- Passwords cannot be reused for six change cycles.
- Individuals can change their own passwords.
- Once a research administrator initializes an individual's password, the individual will be prompted to change the password.

Password Expiration

All user passwords will expire after 365 days.

See also:

- Reset Your FastLane Password
- Change Your FastLane Password

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Password Expiration

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See also:

- Reset Your FastLane Password
- Change Your FastLane Password

Reset Your FastLane Password

If you forgot your password, you can reset it using FastLane's 'Forgot Password' link on the login page.
You will be redirected to Research.gov to reset your password. Once reset you will be able to login to The FastLane system with the new password

The Help Desk is available for any questions or concerns you may have about using FastLane or Research.gov. Either e-mail rgov@nsf.gov or call 800-381-1532.

Change Your FastLane Password

If you feel your password security has been compromised in any way you can change your password immediately.

To change your password, do the following:

1. Users can now change their own passwords using the Change Password link available in FastLane, or by selecting 'Change Password' from Research.gov's My Profile page.
2. Once reset the user can login to FastLane system with the new password.

Look Up Your NSF ID

If you do not know, or cannot remember, your NSF ID, you can look it up using FastLane's NSF ID Lookup tool.

To look up your NSF ID, do the following:

1. Access the NSF ID Lookup tool (https://www.fastlane.nsf.gov/researchadmin/nsfIdLookupRead.do).
2. Enter your first name, last name, and email address, exactly as they appear in your account, in the corresponding boxes.
3. To further refine your search use the organization box. Select **Begins with**, **Contains**, or **Ends with** from the drop-down list, and enter part or all of the organization name associated with the account.
4. Click **Submit**.
5. Click **Ok** on the **Email Confirmation** window.
6. Retrieve your NSF ID from the system generated email, and use it to log into FastLane.

If the system is unable to locate your NSF ID, refine your search using the organization box. If you are still unable to retrieve your NSF ID, contact your FastLane Contact/SPO or equivalent. If your FastLane Contact/SPO is unavailable, contact the FastLane Help Desk at (800) 673-6188 or fastlane@nsf.gov.

Award Search and Proposal Deadlines

Award Search Introduction

Print the contents of the Award Search book.

The FastLane Award Search feature (https://www.fastlane.nsf.gov/a6/A6Start.htm) (Figure 1) enables you to search the awards database for awards. You can do either one of the following:

- Search for awards
- View a listing of awards

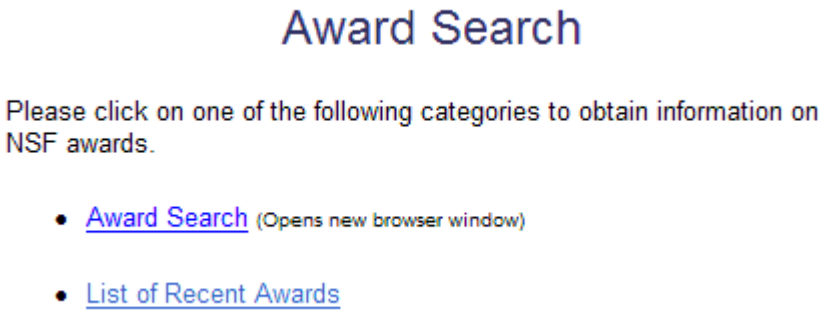


Figure 1 FastLane Award Search screen.

Searches are not case-sensitive.

Search for specific award information by any of the following search options:

- **Awardee** (Figure 2). Search for awards by PI or Co-PI information, including limiting the search to Historical Awards, Active Awards Only, and Expired Awards Only.

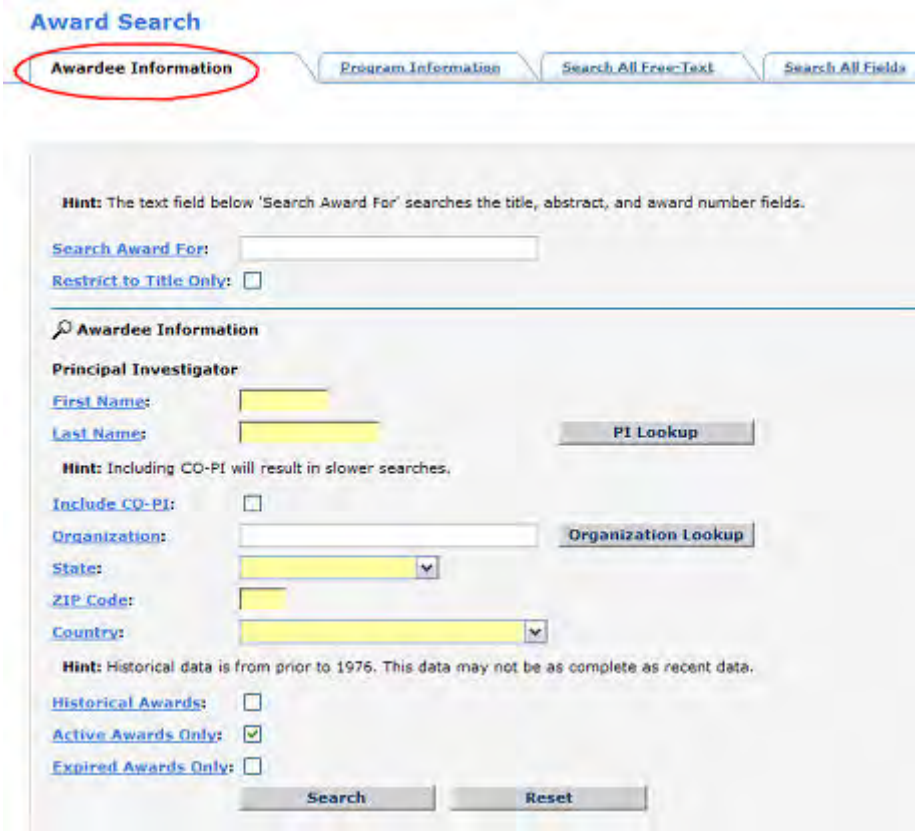


Figure 2 Award Search screen on the Awardee Information tab.

- **Program** (Figure 3)
  Search for awards by National Science Foundation (NSF) organization, program, and program officer (PO), including limiting the search to Historical Awards, Active Awards Only, and Expired Awards Only.

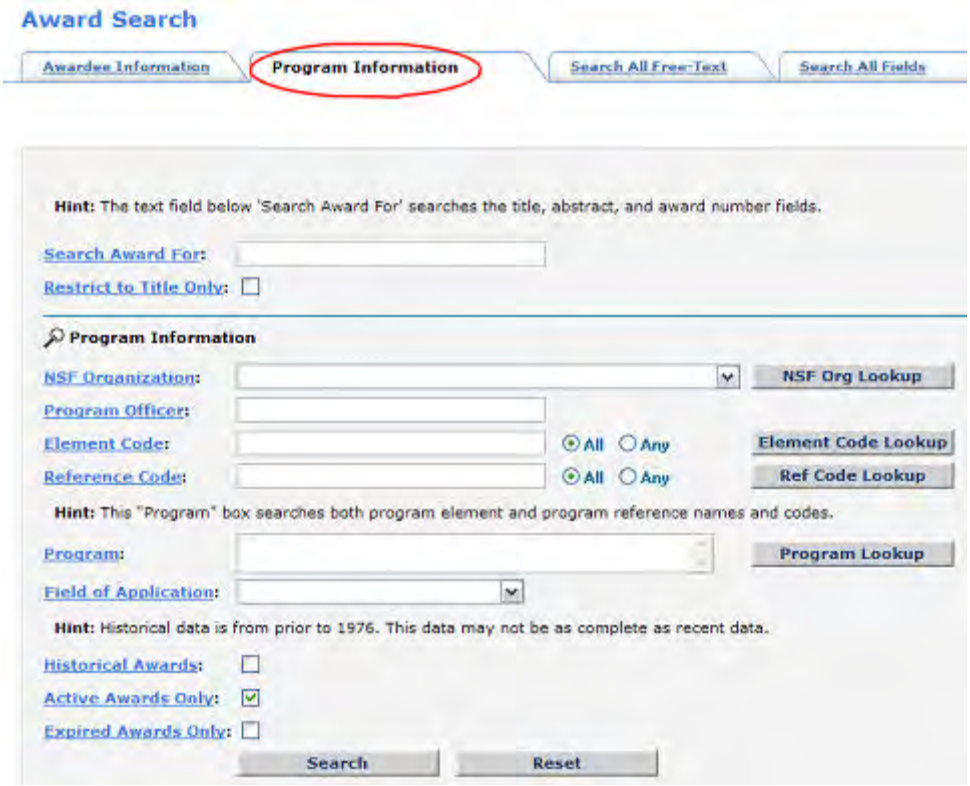


Figure 3 Award Search screen on the Program Information tab.

- **Free-text** (Figure 4)
  Search for awards by title, abstract, and award number text, including limiting the search to title only, Historical Awards, Active Awards Only, and Expired Awards Only.

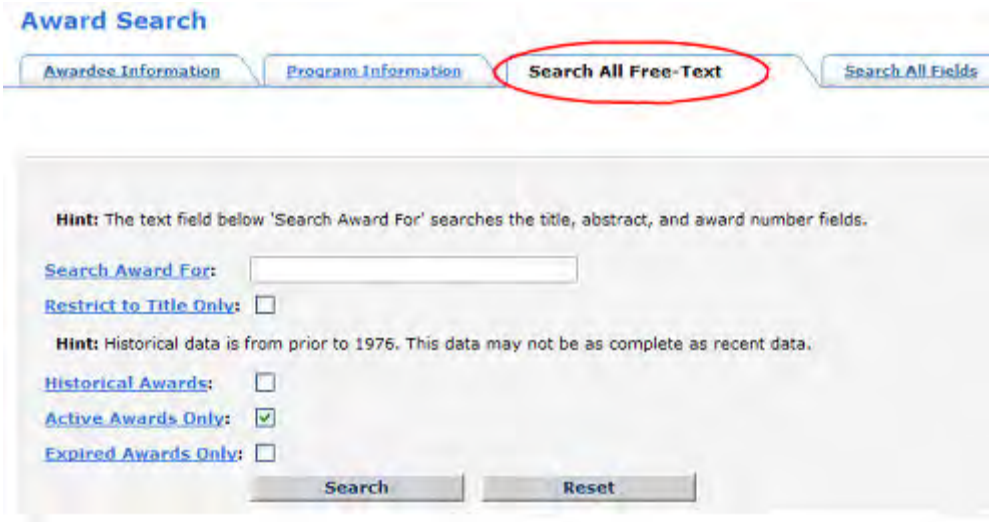


Figure 4 Award Search screen on the Free-Text Search tab.

- **All Fields** (Figure 5)
  Search for awards using awardee, program, and free-text criteria.

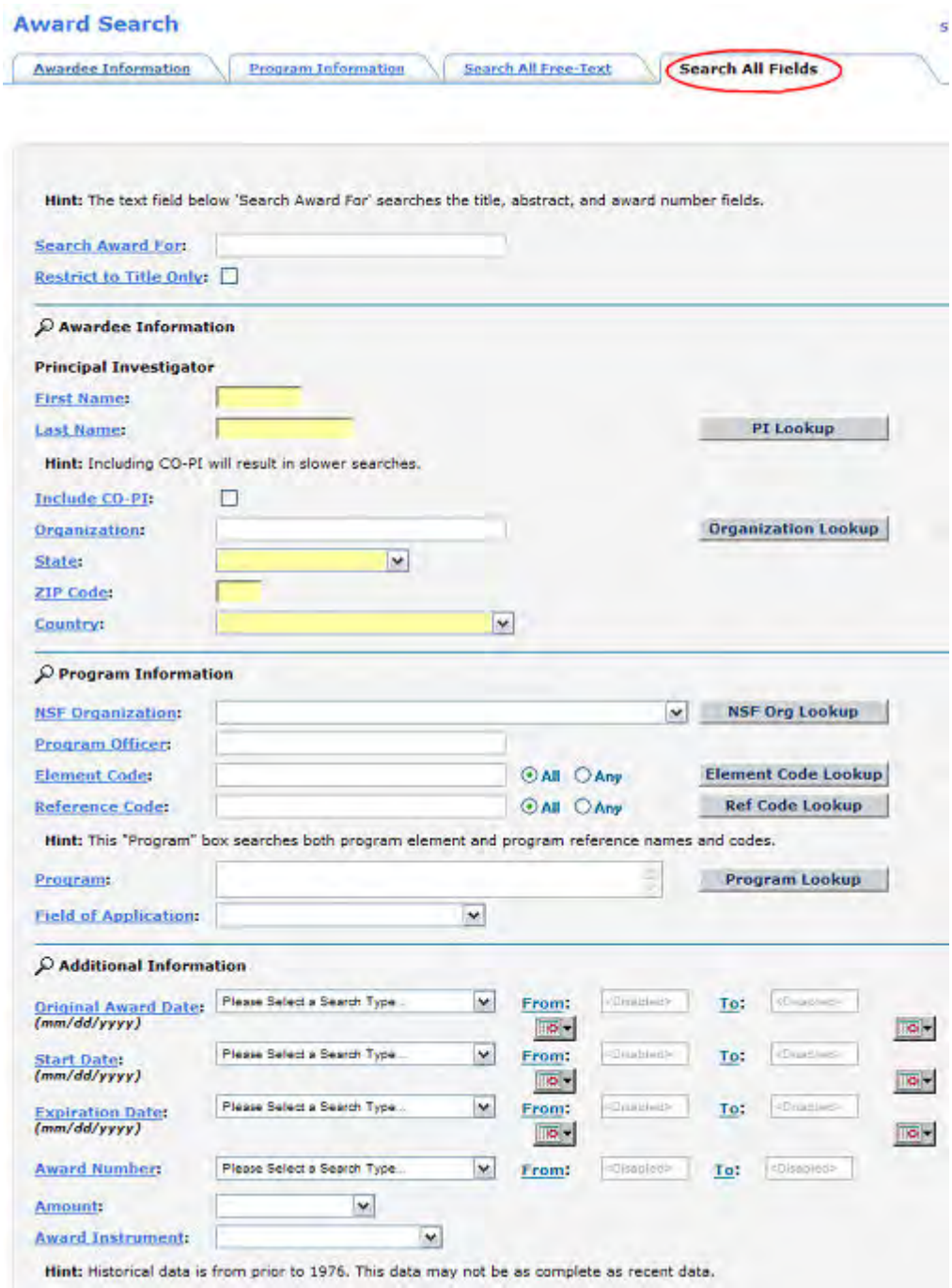


Figure 5 Award Search screen on the Search All Fields tab.

See also:

- Improve search results
- Export award results

Award Search Introduction

Print the contents of the Award Search book.

The FastLane Award Search feature (https://www.fastlane.nsf.gov/a6/A6Start.htm) (Figure 1) enables you to search the awards database for awards. You can do either one of the following:

- Search for awards
- View a listing of awards

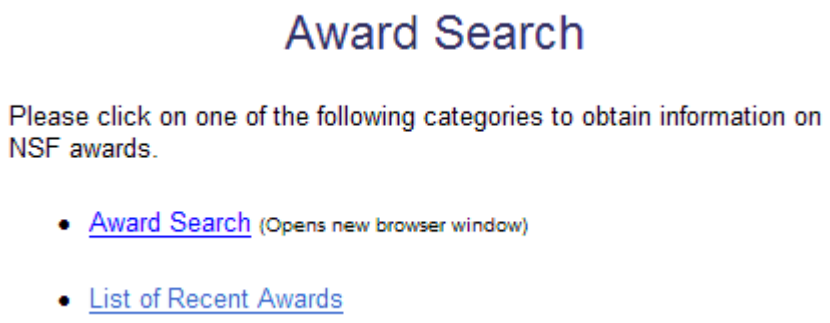


Figure 1 FastLane Award Search screen.

Searches are not case-sensitive.

Search for specific award information by any of the following search options:

- **Awardee** (Figure 2). Search for awards by PI or Co-PI information, including limiting the search to Historical Awards, Active Awards Only, and Expired Awards Only.

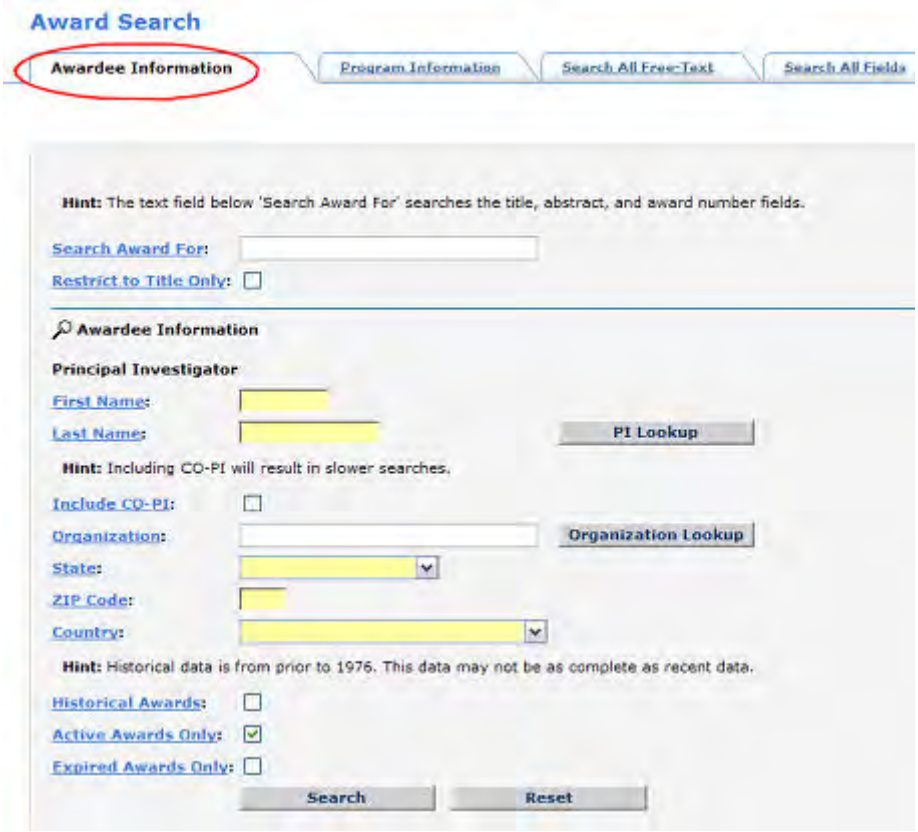


Figure 2 Award Search screen on the Awardee Information tab.

- **Program** (Figure 3)
  Search for awards by National Science Foundation (NSF) organization, program, and program officer (PO), including limiting the search to Historical Awards, Active Awards Only, and Expired Awards Only.

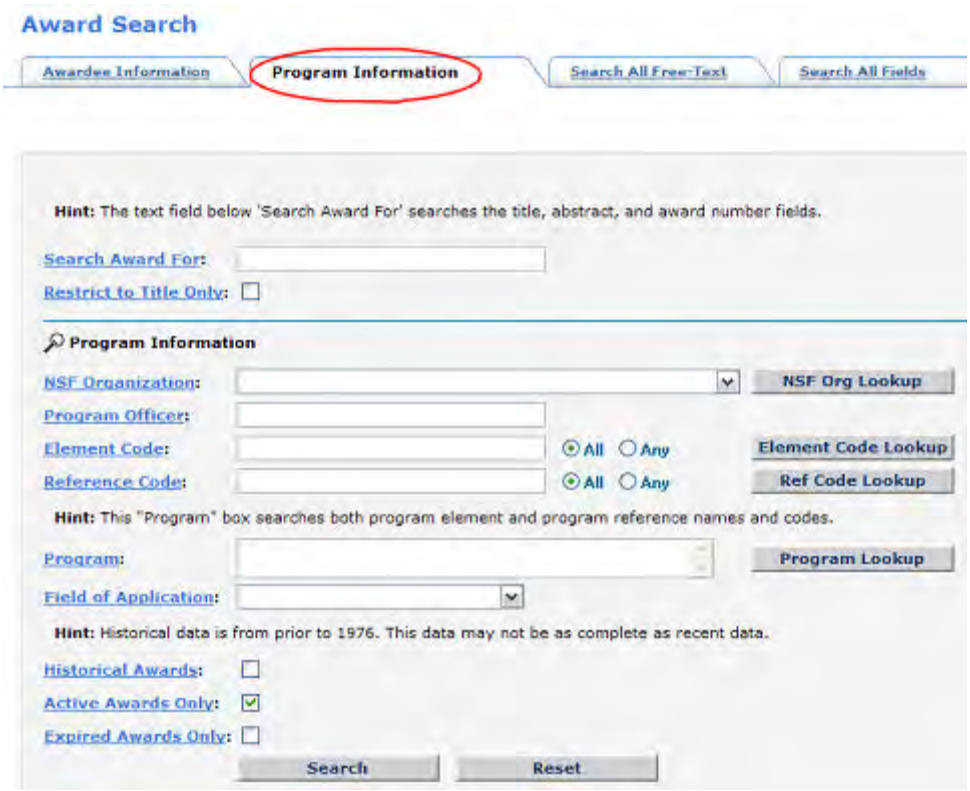


Figure 3 Award Search screen on the Program Information tab.

- **Free-text** (Figure 4)
  Search for awards by title, abstract, and award number text, including limiting the search to title only, Historical Awards, Active Awards Only, and Expired Awards Only.

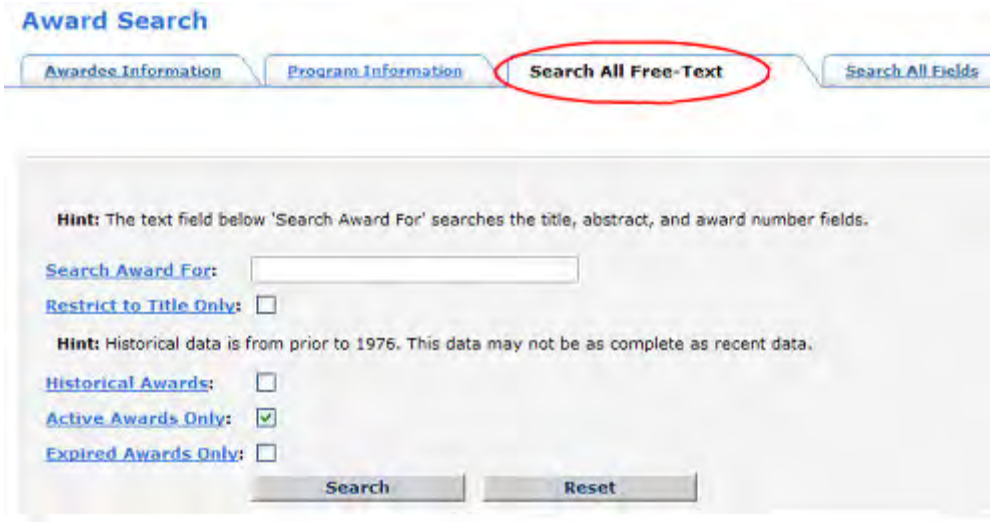


Figure 4 Award Search screen on the Free-Text Search tab.

- **All Fields** (Figure 5)
  Search for awards using awardee, program, and free-text criteria.

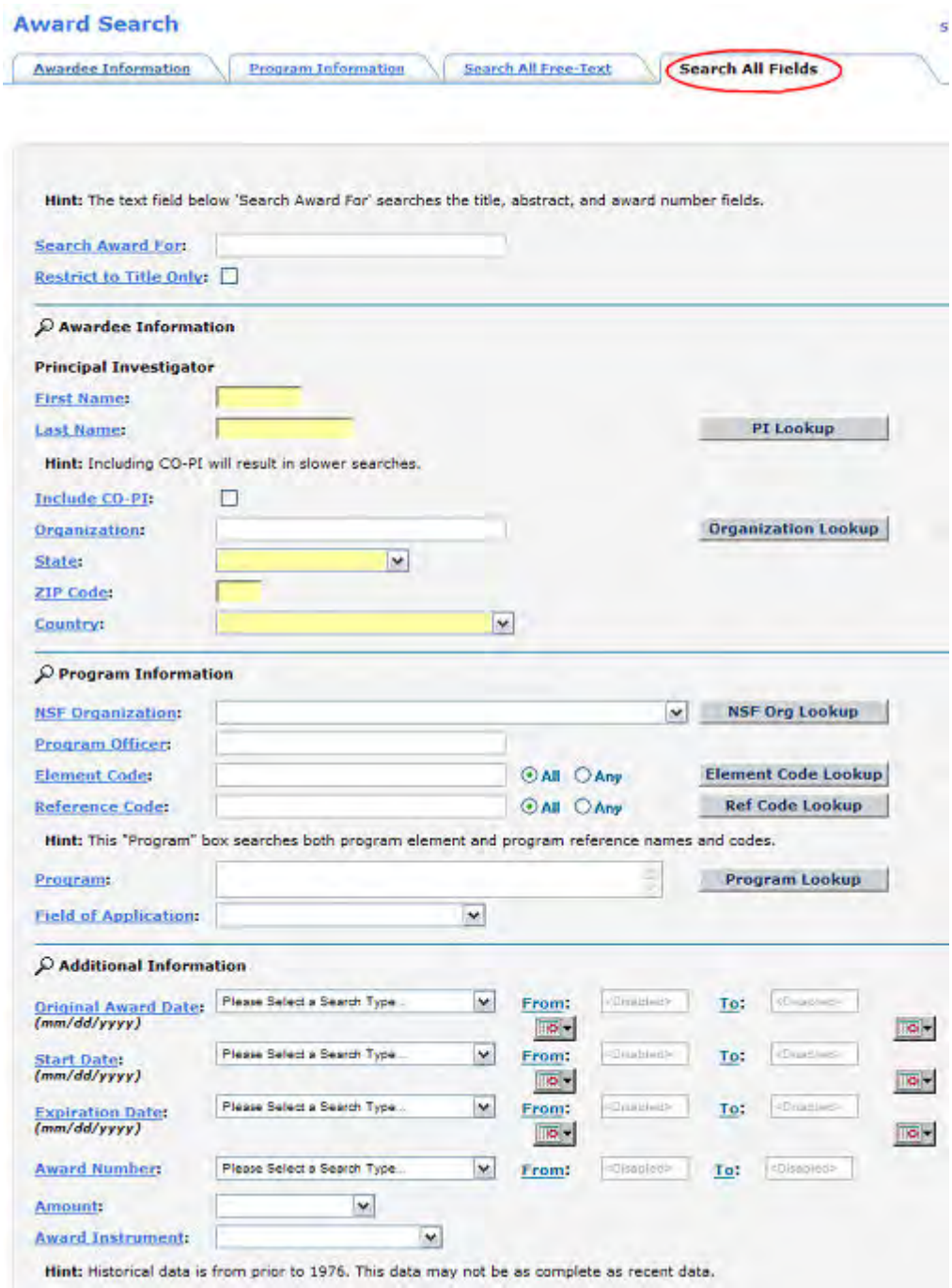


Figure 5 Award Search screen on the Search All Fields tab.

See also:

- Improve search results
- Export award results

Search for Awards

To search for an award, do the following:

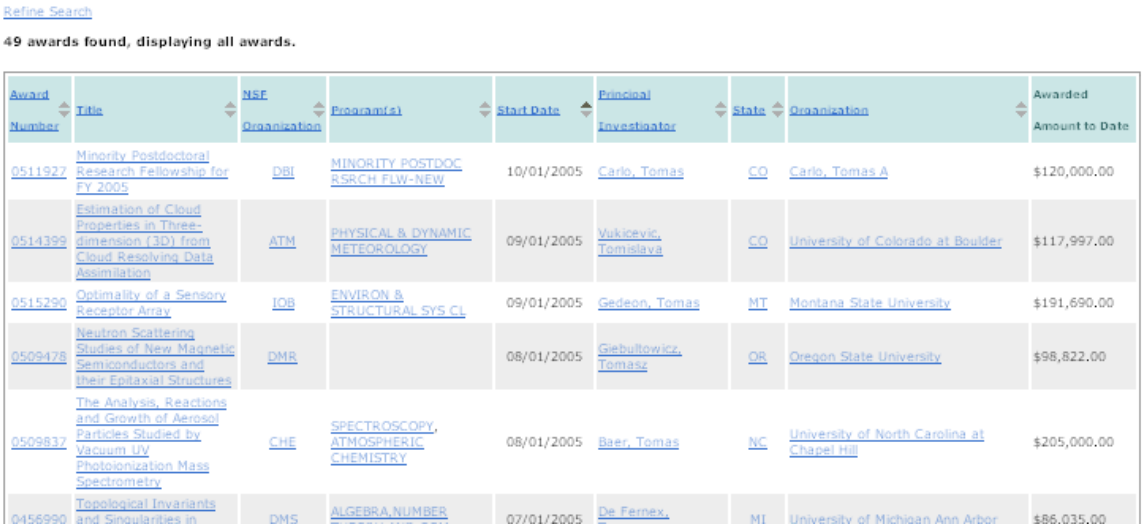
1. Access the **Award Search** page:
   - From the URL (http://www.nsf.gov/awardsearch/index.jsp)
   - From the FastLane Homepage (https://www.fastlane.nsf.gov/fastlane.jsp):
     a. Click the **Award Search and Funding Trends** Quick Link on the left-hand side of the page.
     b. Click **Search Awards** on the **Award Search and Funding Trends** page.
     c. Click **Award Search** on the **Award Search** page.
2. Determine which search option is best on the basis of the award information that you have.
3. Click the corresponding search tab.
4. Complete at least one of the search criterion fields.
5. Click the **search** button to search. Or, click the **reset** button to clear the fields and start again. Awards matching your search criteria are displayed in a table with the following information:
   - Award Number
   - Title
   - NSF Organization
   - Program(s)
   - Start Date
   - Principal Investigator
   - State
   - Organization
   - Awarded Amount to Date
6. View the appropriate award. Or, click **Back** or **Refine Search** to return to your original search criteria on the **Search Award** page for further definition.

See Improve Search Results

View Awards

To view an award, do the following:

1. Locate the specific award number from your search results (Figure 1).



Refine Search

49 awards found, displaying all awards.

Award Number	Title	NSF Organization	Program(s)	Start Date	Principal Investigator	State	Organization	Awarded Amount to Date
0511927	Minority Postdoctoral Research Fellowship for FY 2005	DBI	MINORITY POSTDOC RSRCH FLW-NEW	10/01/2005	Carlo, Tomas	CO	Carlo, Tomas A	$120,000.00
0514399	Estimation of Cloud Properties in Three-dimension (3D) from Cloud Resolving Data Assimilation	ATM	PHYSICAL & DYNAMIC METEOROLOGY	09/01/2005	Vukicevic, Tomislava	CO	University of Colorado at Boulder	$117,997.00
0515290	Optimality of a Sensory Receptor Array	IOB	ENVIRON & STRUCTURAL SYS CL	09/01/2005	Gedeon, Tomas	MT	Montana State University	$191,690.00
0509478	Neutron Scattering Studies of New Magnetic Semiconductors and their Epitaxial Structures	DMR		08/01/2005	Giebultowicz, Tomasz	OR	Oregon State University	$98,822.00
0509832	The Analysis, Reactions and Growth of Aerosol Particles Studied by Vacuum UV Photoionization Mass Spectrometry	CHE	SPECTROSCOPY, ATMOSPHERIC CHEMISTRY	08/01/2005	Baer, Tomas	NC	University of North Carolina at Chapel Hill	$205,000.00
0456990	Topological Invariants and Singularities in	DMS	ALGEBRA,NUMBER	07/01/2005	De Fernex,	MI	University of Michigan Ann Arbor	$86,035.00

Figure 1 Award Search Results.

2. Click on the award number. The award abstract opens in a new window (Figure 2).

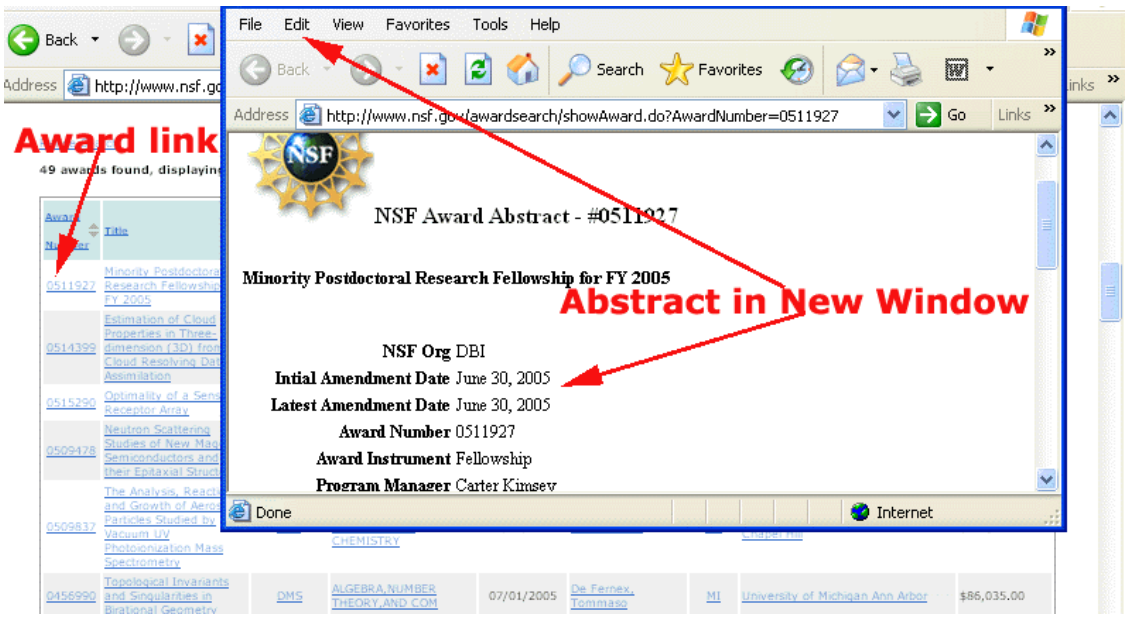


Figure 2 Proposal Abstract.

See Export awards

Improve Search Results

You can improve your search results by keeping the following in mind:

- Enter as many search criteria that you can to generate more specific results.
- Enter few search criteria to potentially increase the results.
- Use wild card searches when you know little about the specific award. For example, enter part of the program name in the results list (e.g., "bio" instead of "biography") with the trailing wild card symbol--an asterisk (*)--as in "bio*". Wild card symbols represent one or more characters. That is, using "bio*" will return results that match any words that begin with "bio" and one or more characters thereafter (e.g., "biography", "biology", "biologist", "biophysics", etc).
- Contact the National Science Foundation (NSF) when all else fails. When contacting NSF, provide as much information about your search as possible and include your email address or phone number.

Export Award Searches

To export (save) your award search results, do the following:

1. Scroll to the bottom of your search results page.
2. Right-click on the icon (Figure 1) for the export format you want to download. You can export search results in Microsoft® Excel®, XML, or CSV formats.

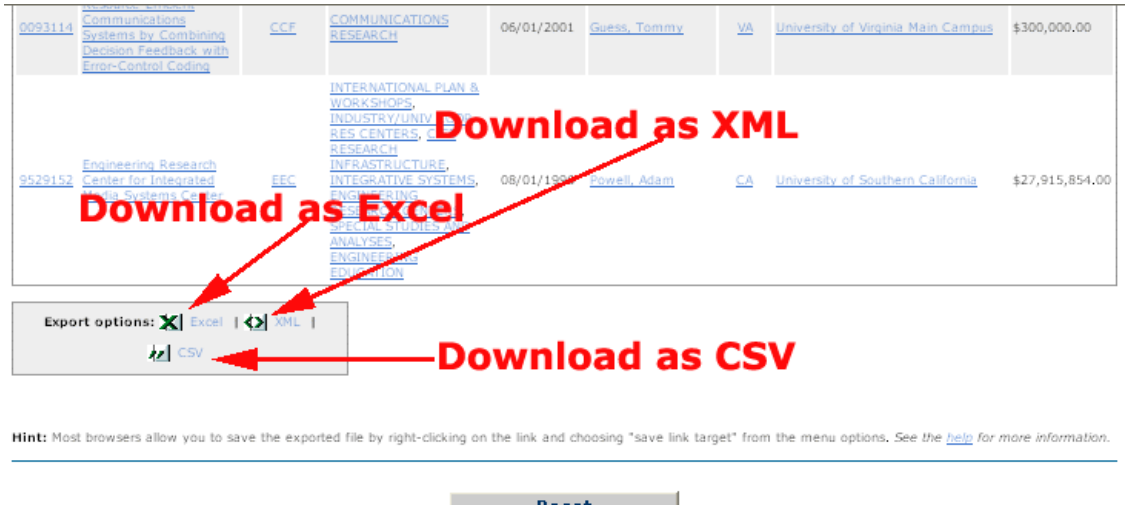


Figure 1 Download Options.

3. Click **Save Target As** (Internet Explorer for Microsoft Windows) (Figure 2)

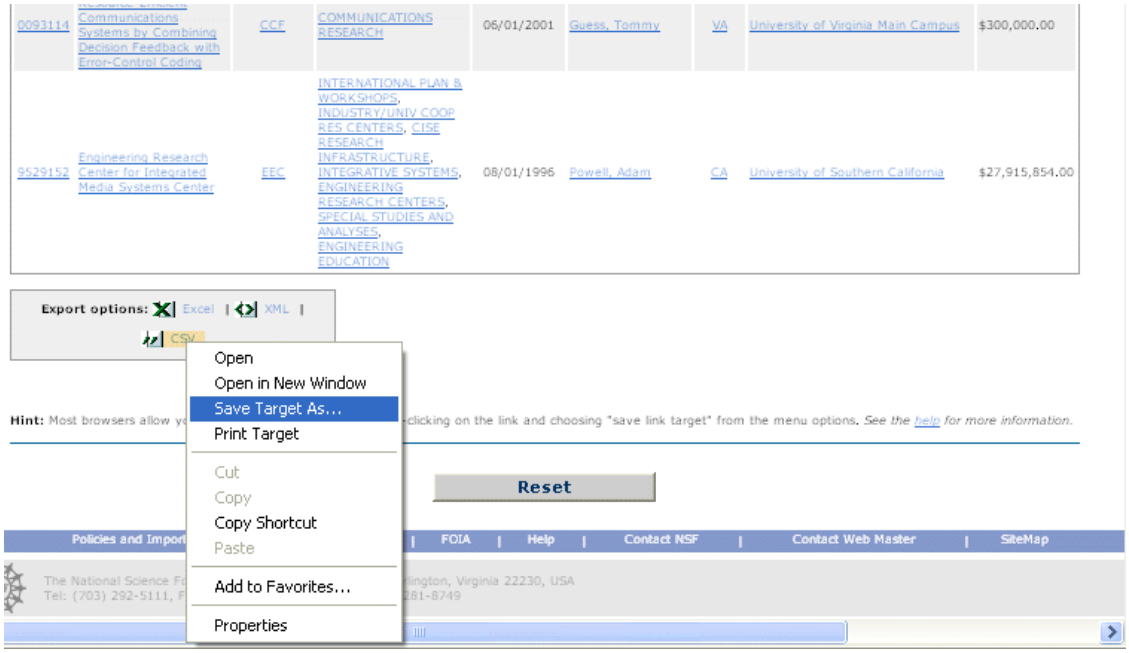


Figure 2 Saving File in Internet Explorer.

or **Save Link As** (Firefox® for Microsoft® Windows®) (Figure 3).

Figure 3 Saving File in Firefox.

4. Navigate to the location on your computer that you want the file saved to.
5. Click **Save**.

Proposal Deadlines

For a list of proposal submission deadlines for current funding opportunities, see Active Funding Opportunities. (This link takes you out of the FastLane system.)

Role	What You Need for Access	Registration Required?
Public User	Registration on **Honorary Awards System Home Page** screen for login account and password	Registration only for Honorary Awards

Proposal Functions

Proposal Functions Introduction

FastLane Help for Proposal Functions covers proposal activities for all of the following roles:

- Principal Investigator (PI)
- Co-PI
- Other Authorized User
- Sponsored Project Office (SPO)
- Authorized Organizational Representative (AOR)

Proposal activities include the following:

- Create and Submit Letters of Intent
- Prepare a Proposal
- Submit and Sign a Proposal
- Update a Submitted Proposal
- Check the Status of a Submitted Proposal
- View and Print a Submitted Proposal
- Revise a Submitted Proposal Budget
- Withdraw a Proposal

Proposal Functions Introduction

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- Check the Status of a Submitted Proposal
- View and Print a Submitted Proposal
- Revise a Submitted Proposal Budget
- Withdraw a Proposal

Log in to Proposal Functions

Proposal Functions Login Introduction

Print the contents of the Log In to Proposal Functions book.

Log in to FastLane's Proposal System by role:

- PI and Co-PI Login
- Other Authorized User (OAU) Login
- SPO and AOR Login

Proposal Functions Login Introduction

Print the contents of the Log In to Proposal Functions book.

Log in to FastLane's Proposal System by role:

- PI and Co-PI Login
- Other Authorized User (OAU) Login
- SPO and AOR Login

Principal Investigator (PI) or Co-Principal Investigator (Co-PI) Login to Proposal Functions

1. On the **FastLane Home Page** screen (Figure 1), click **Proposals, Awards, and Status**. The **Proposals, Awards, and Status** screen displays (Figure 2).

Figure 1 FastLane Home Page screen. The Proposals, Awards, and Status link is circled.

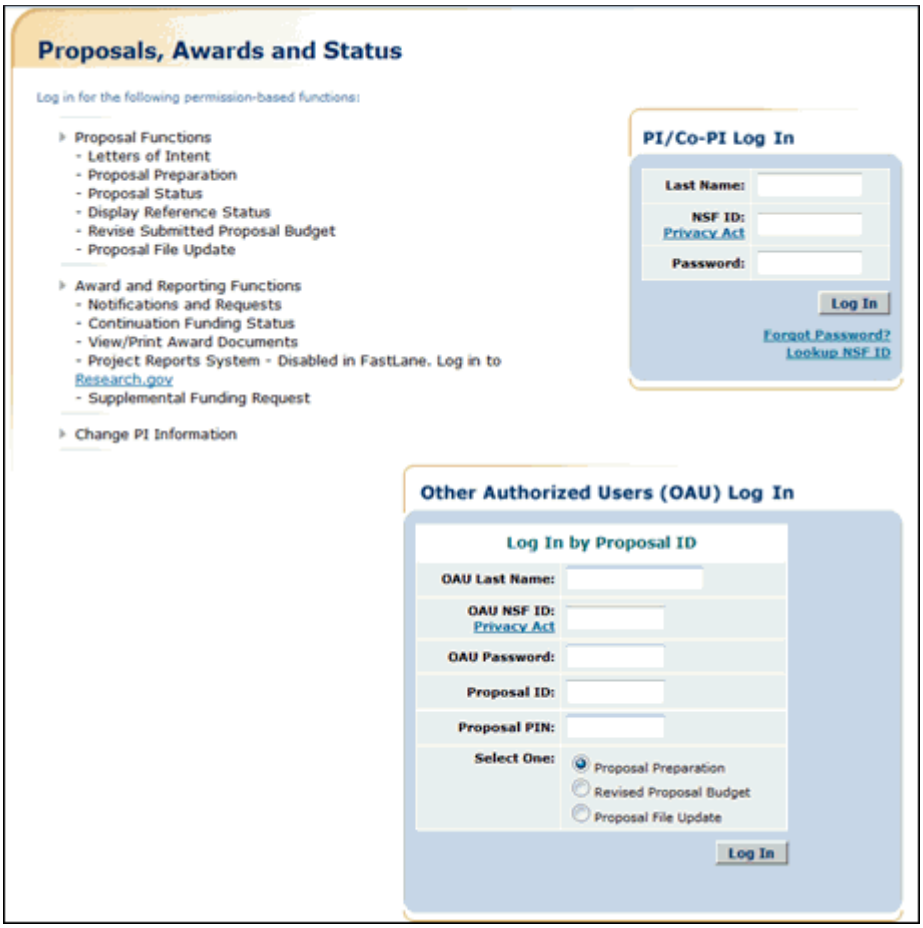

Figure 2 Proposals, Awards, and Status screen.

2. In the **PI/Co-PI Login** section (Figure 2), type in the boxes the following information:
   - **Last Name**
   - **NSF ID**
     Your National Science Foundation Identification number
   - **Password**
3. Click the **Login** Button (Figure 2). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management** screen displays (Figure 3).

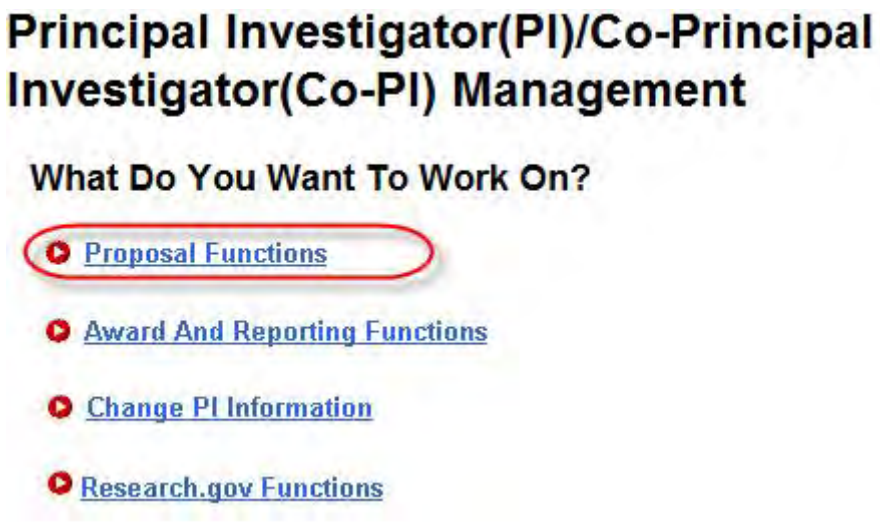

Figure 3 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management screen. The Proposal Functions link is circled.

4. Click **Proposal Functions** (Figure 3). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Proposal Functions** screen displays (Figure 4).

Figure 4 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Proposal Functions screen.

See FastLane Help for Proposal Functions.

Other Authorized User (OAU) Login to Proposal Functions

1. On the **FastLane Home Page**screen (Figure 1), click **Proposals, Awards, and Status**. The **Proposals, Awards, and Status** screen displays (Figure 2).

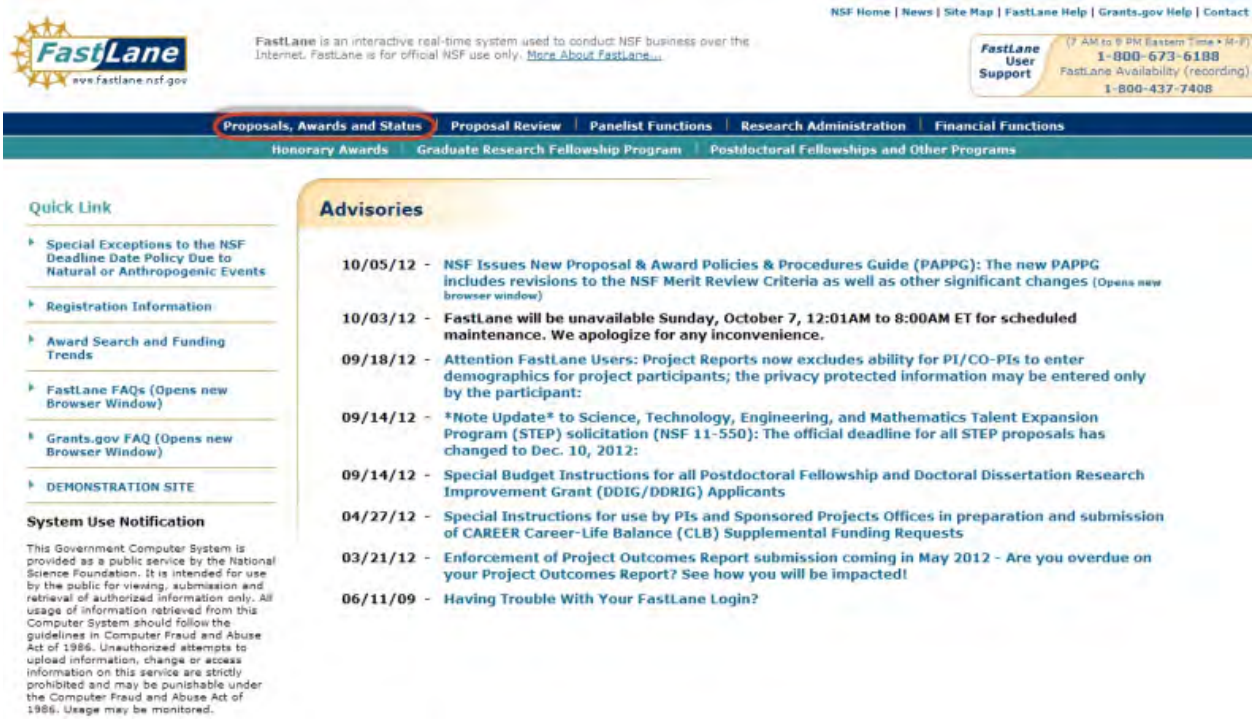

Figure 1 FastLane Home Page screen. The Proposals, Awards, and Status link is circled.

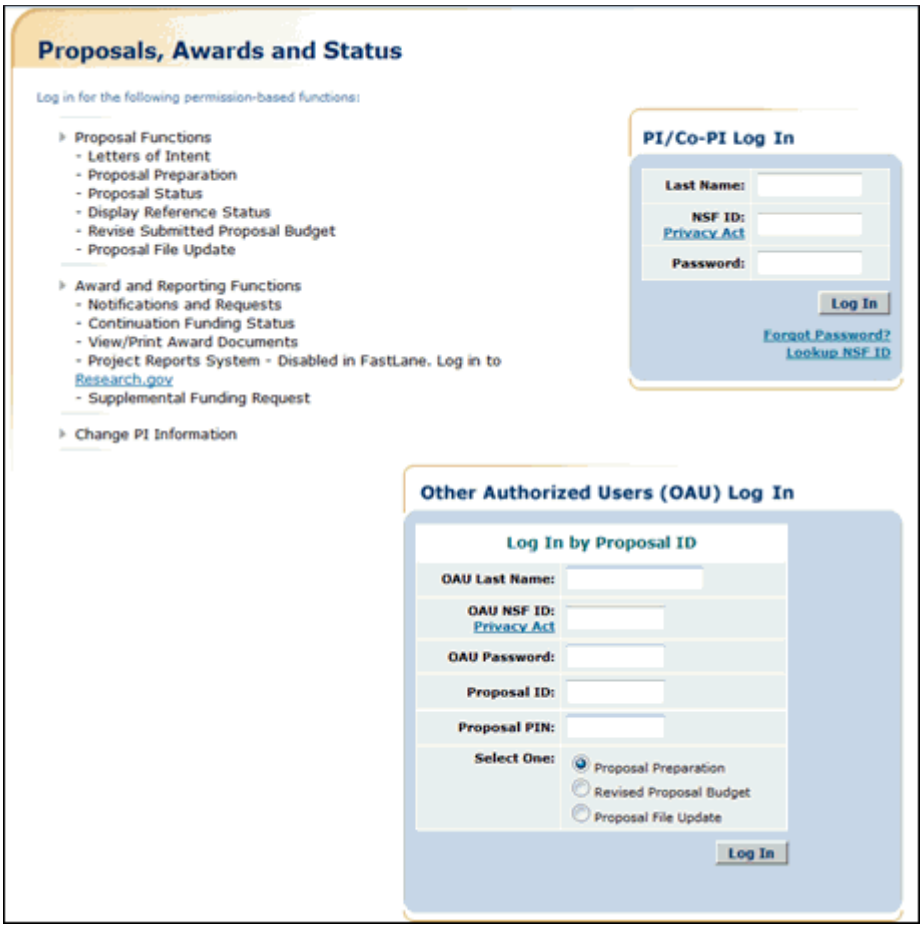

Figure 2 Proposals, Awards, and Status screen.

2. In the **OAU Login** section (Figure 1), type the following information in the boxes:
   - **Last Name**
   - **NSF ID**
     Your National Science Foundation Identification number
   - **Password**
   - **Proposal ID**
     The Proposal ID number that you received from the Principal Investigator (PI)
   - **Proposal PIN**
     The Proposal PIN that you received from the PI

   OR

   - **Award Number**
   - **NSF ID**
     Your National Science Foundation Identification number
   - **Award PIN**
     The Award ID that you received from the Principal Investigator (PI)
3. Click the radio button for one of the following for the function you want to perform (Figure 2):
   - Proposal Preparation
   - Revised Proposal Budget

- Proposal File Update
- Project Report

4. Click the **Log In** button (Figure 2).

If you selected ***Proposal Preparation***, the **Form Preparation** screen displays (Figure 3) for the proposal whose ID and PIN you entered. See Prepare Proposal Forms for instructions.

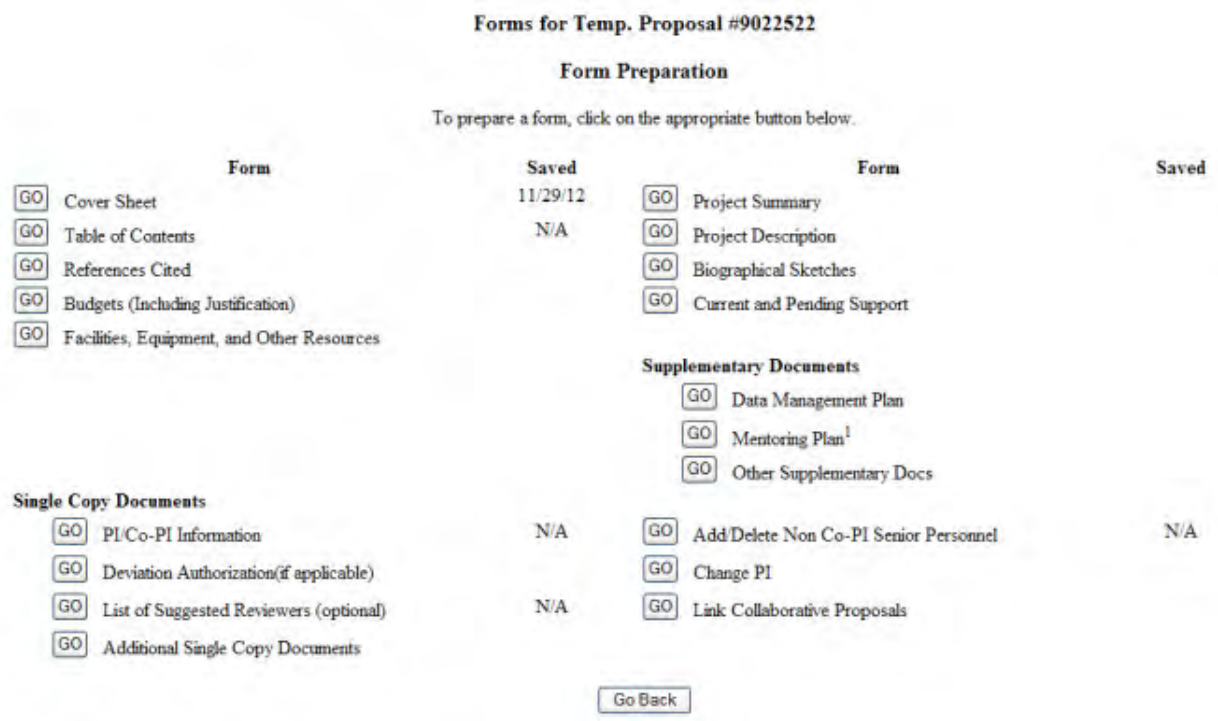

Figure 3 Form Preparation screen for the proposal.

If you selected ***Revised Proposal Budget***, the **Proposal Revised Budget** screen displays (Figure 4) for the proposal whose ID and PIN you entered. See View the Budget, Edit the Submitted Budget, and Refresh to the Last Submitted Budget for instructions.

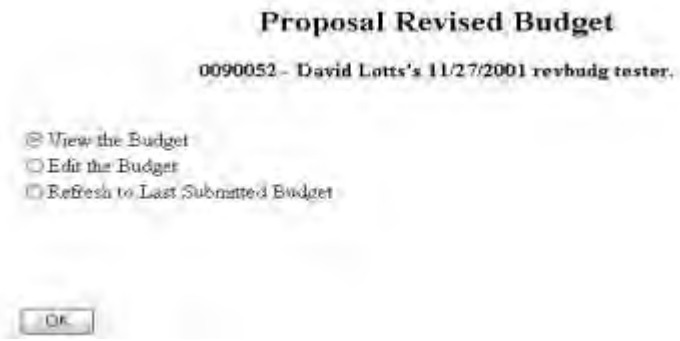

Figure 4 Proposal Revised Budget screen for the proposal.

If you selected ***Proposal File Update****,* the **Proposal File Update Control** screen displays (Figure 5) for the proposal whose ID and PIN you entered. See Create a Proposal Update, View and Edit an Update, View an Update Summary, Delete an Update, and Create an Update PIN for instructions.

Figure 5 Proposal File Update Control screen for the proposal.

See FastLane Help for Proposal Functions.

Sponsored Project Office (SPO) Representative and Authorized Organizational Representative (AOR) Login to Proposal Functions

1. On the **FastLane Home Page** screen (Figure 1), click **Research Administration**. The **Research Administration** screen displays (Figure 2).

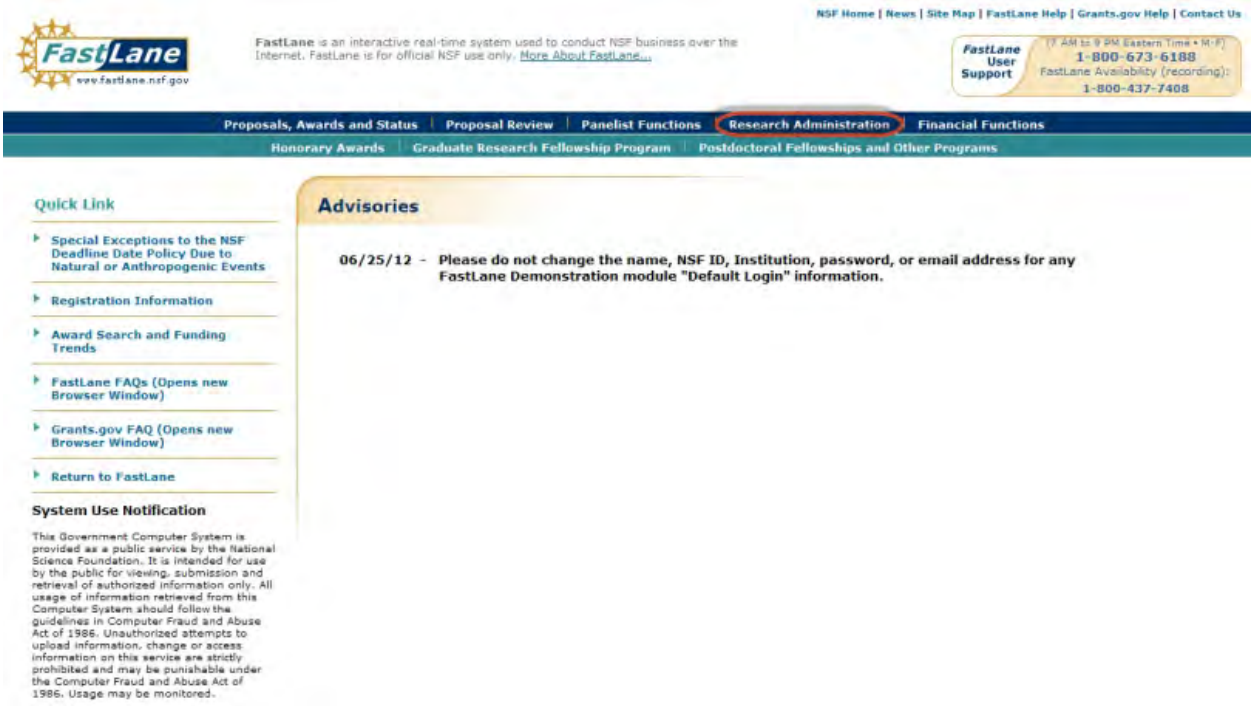

Figure 1 FastLane Home Page screen. The Research Administration link is circled.

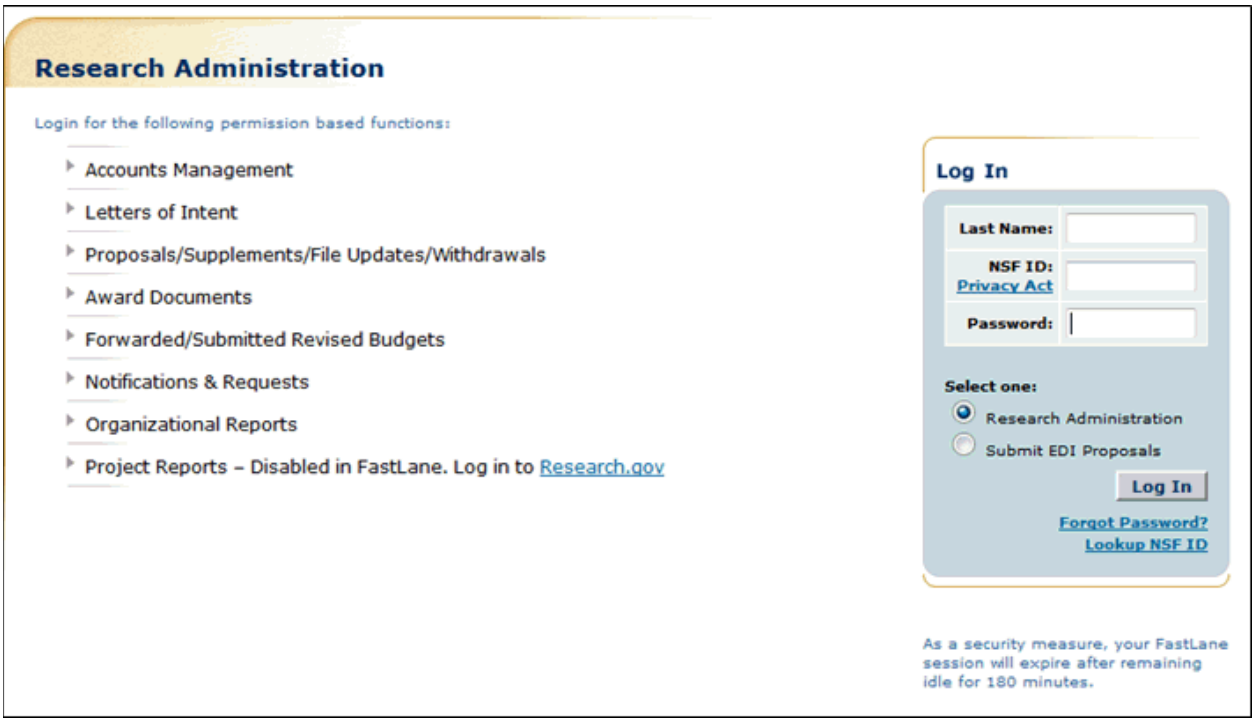

Figure 2 Research Administration screen.

2. In the **Login** section, type the following information in the boxes (Figure 2):
   - **Last Name**
   - **NSF ID**
     Your National Science Foundation Identification number
   - **Password**
3. Click the radio button for Research Administration (Figure 2).
4. Click the **Login** button (Figure 2). The **Research Administration** screen displays (Figure 3).

Figure 3 Research Administration screen.

See FastLane Help for Proposal Functions.

Letters of Intent

Letters of Intent Introduction

Print the contents of the Letters of Intent book.

Some NSF program solicitations require or request submission of a letter of intent (LOI) in advance of submission of a full proposal. The predominant reason for its use is to help NSF program staff to gauge the size and range of the competition, enabling earlier selection and better management of reviewers and panelists. The requirement to submit an LOI will be identified in the program solicitation. Failure to submit a required LOI identified in a program solicitation may result in a full proposal not being accepted or returned without review. See PAPPG Chapter I.D.1 for further information.

You can create more than one Letter of Intent for a single program solicitation. However, a warning message displays that a Letter of Intent has already been submitted for that solicitation.

Roles

The PI can do the following:

- Create a Letter of Intent for any solicitation that has requested or required it
- Submit directly to the NSF Letters of Intent for certain types of solicitations
- Forward a Letter of Intent to the SPO for those types of solicitations that require AOR approval

The Sponsored Project Office (SPO)/ Authorized Organizational Representative (AOR) can do the following:

- Create a Letter of Intent for certain types of solicitations
- View all Letters of Intent created by PIs in their organization, including those the PI directly submitted to NSF
- Edit Letters of Intent forwarded by the PI
- Submit a Letter of Intent (AOR only)
- Return a Letter of Intent to a PI

To work on Letters of Intent, see one of the following for instructions:
- Create a Letter of Intent Introduction
- Work on Saved and Submitted Letters of Intent

Create a New Letter of Intent

Create a Letter of Intent Introduction

The process of creating a Letter of Intent involves four steps:

1. **Access** the **Letters of Intent** screen on the **Create New LOI from Solicitation** tab.
   See Access the Letters of Intent Screen as a PI or Access the Letters of Intent Screen as an SPO/AOR for instructions.
2. Find the solicitation that you want to prepare a Letter of Intent in response to.
   See Step 2 Find a Solicitation.
3. Access and complete the Letter of Intent.
   See What Information is Requested in the Letter of Intent? and Complete the Letter of Intent for instructions.
4. Process the Letter of Intent.
   See one of the following for instructions:
   - Save a New Letter of Intent
   - Forward a New Letter of Intent to the SPO
   - Submit a New Letter of Intent

Create a Letter of Intent Introduction

The process of creating a Letter of Intent involves four steps:

1. **Access** the **Letters of Intent** screen on the **Create New LOI from Solicitation** tab.
   See Access the Letters of Intent Screen as a PI or Access the Letters of Intent Screen as an SPO/AOR for instructions.
2. Find the solicitation that you want to prepare a Letter of Intent in response to.
   See Step 2 Find a Solicitation.
3. Access and complete the Letter of Intent.
   See What Information is Requested in the Letter of Intent? and Complete the Letter of Intent for instructions.
4. Process the Letter of Intent.
   See one of the following for instructions:
   - Save a New Letter of Intent
   - Forward a New Letter of Intent to the SPO
   - Submit a New Letter of Intent

Step 1 Access the Letters of Intent Screen

Step 1 Access the Letters of Intent Screen

Access the **Letters of Intent** screen by role:

- As a PI
- As an SPO

Step 1 Access the Letters of Intent Screen

Access the **Letters of Intent** screen by role:

- As a PI
- As an SPO

Access the Letters of Intent Screen as a PI

1. On the **FastLane Home Page** screen, log in as a PI to Proposals, Status, and Awards (see PI/Co-PI Login). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management** screen displays (Figure 1).

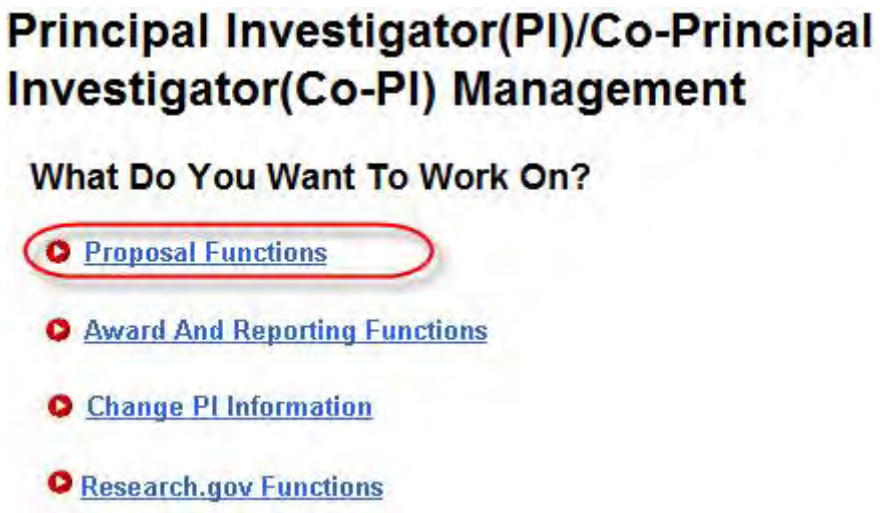

Figure 1 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management screen. The Proposal Functions link is circled.

2. Click **Proposal Functions** (Figure 1). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Proposal Functions** screen displays (Figure 2).

Figure 2 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Proposal Functions screen. The Letters of Intent link is circled.

3. Click **Letters of Intent** (Figure 2). The **Letters of Intent** screen displays on the **Create New LOI from Program Solicitation** tab (Figure 3) with a listing of the available solicitations. You have these options on this screen:
   - View all program solicitations
   - Search for solicitations
   - View a program solicitation
   - Complete the Letter of Intent

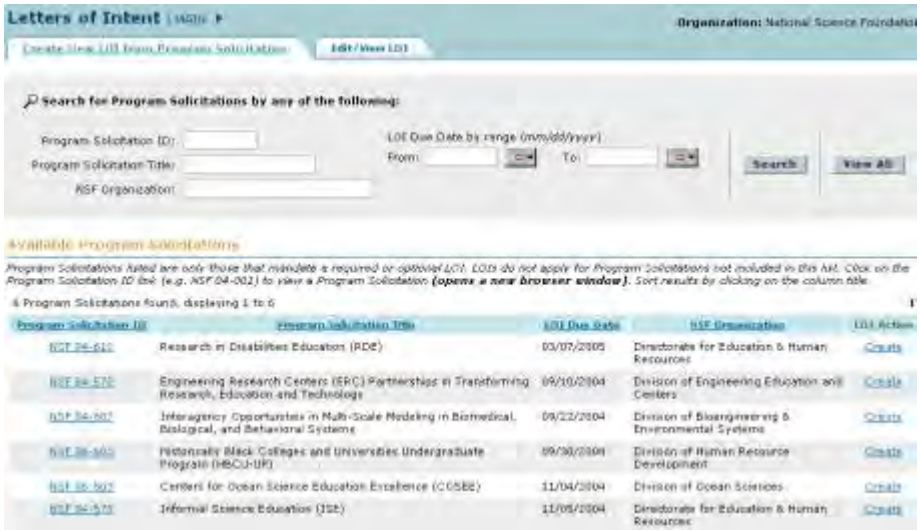

Figure 3 Letters of Intent screen on the Create New LOI from Program Solicitation tab.

See Step 2 Find a Solicitation.

Access the Letters of Intent Screen as an SPO/AOR

1. On the **FastLane Home Page** screen, log in to Research Administration (see SPO/AOR Login). The **Research Administration** screen displays (Figure 1).

Figure 1 Research Administration screen. The Letters of Intent link is circled.

2. Click **Letters of Intent** (Figure 1). The **Letters of Intent** screen displays on the **Edit/View LOI** tab (Figure 2).

Figure 2 Letters of Intent screen on the Edit/View LOI tab. The Create New LOI from Program Solicitation tab is circled.

3. Click the **Create New LOI from Program Solicitation** tab (Figure 2). The **Letters of Intent** screen displays on the **Create New LOI from Program Solicitation** tab (Figure 3) with a listing of available solicitations. You have these options:
   - View all program solicitations
   - Search for solicitations
   - View a program solicitation
   - Complete the Letter of Intent

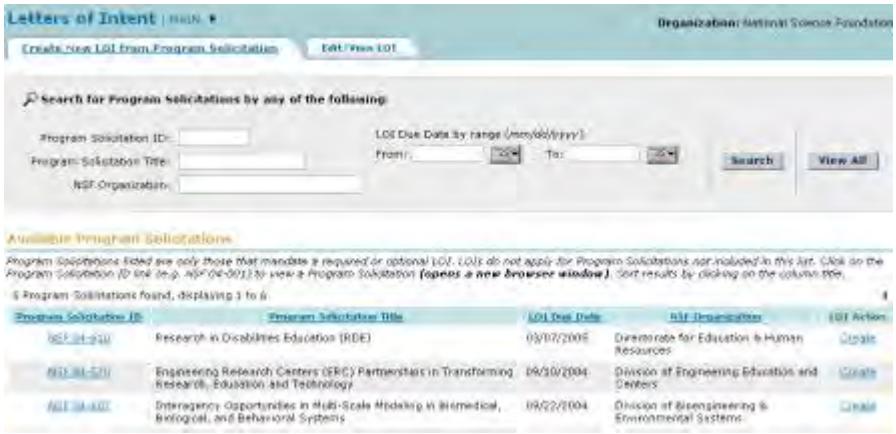

Figure 3 Letters of Intent screen on the Create New LOI from Program Solicitation tab.

See Step 2 Find a Solicitation.

Step 2 Find a Solicitation

Step 2 Find a Solicitation

There are three ways to find a solicitation:
- View all solicitations
- Search for a solicitation
- View a solicitation

View All Program Solicitations

1. Access the **Letters of Intent** screen on the **Create New LOI from Program Solicitation** tab (Figure 1) (see Access the Letters of Intent Screen as PI or Access the Letters of Intent Screen as an SPO/AOR).

Figure 1 Letters of Intent screen on the Create New LOI from Program Solicitation tab. The View All button is circled.

2. Click the **View All** button (Figure 1). The **Letters of Intent** screen displays on the **Create New LOI from Program Solicitation** tab, with all program solicitations listed in the **Available Program Solicitations** section (Figure 2). You have these options:
   - View a program solicitation
   - Complete the Letter of Intent

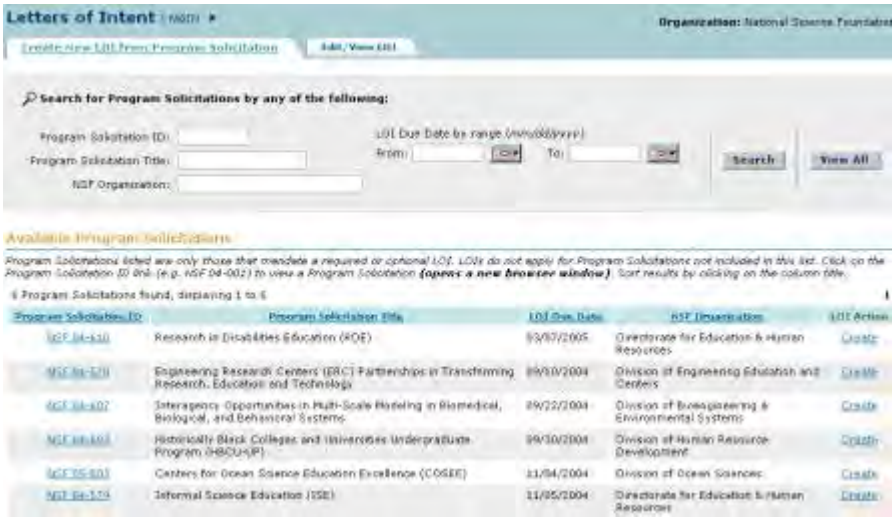

Figure 2 Letters of Intent screen on the Create New LOI from Program Solicitation tab. All the available solicitations are listed.

See also:
- Search for Solicitations
- View a Program Solicitation
- Step 3 Complete the Letter of Intent

Search for Solicitations

1. Access the **Letters of Intent** screen on the **Create New LOI from Program Solicitation** tab (Figure 1) (see Access the Letters of Intent Screen as PI or Access the Letters of Intent Screen as an SPO/AOR).

Figure 1 Letters of Intent screen on the Create New LOI from Program Solicitation tab. The Search button is circled.

2. In the **Search for Program Solicitations** section (Figure 1), you can search for solicitations by any one or a combination of the following:
   - **Program Solicitation ID**
     In the **Program Solicitation ID** box (Figure 1), type the Program Solicitation ID.
   - **Program Solicitation Title**
     In the **Program Solicitation Title** box (Figure 1), type the Program Solicitation title.
   - **NSF Organization**
     In the **NSF Organization** box (Figure 1), type the name of the NSF organization. See http://www.nsf.gov/funding/research_edu_community.jsp for a listing of NSF organizations.
   - **Letter of Intent Due Date Range**
     In the **From** box (Figure 1), type the start date for the date range.
     In the **To** box (Figure 1), type the end date for the date range.
3. Click the **Search** button (Figure 1). The **Letters of Intent** screen displays on the **Create New LOI from Program Solicitation** tab (Figure 2) with the results of your search listed in the **Available Program Solicitations** section.

Figure 2 Letters of Intent screen on the Create New LOI from Program Solicitation tab. The search results are listed in the Available Program Solicitations section.

See also:
- View All Program Solicitations
- View a Program Solicitation
- Step 3 Complete the Letter of Intent

View a Program Solicitation

1. Access the **Letters of Intent** screen on the **Create New LOI from Program Solicitation** tab (Figure 1) (see Access the Letters of Intent Screen as PI or Access the Letters of Intent Screen as an SPO/AOR).

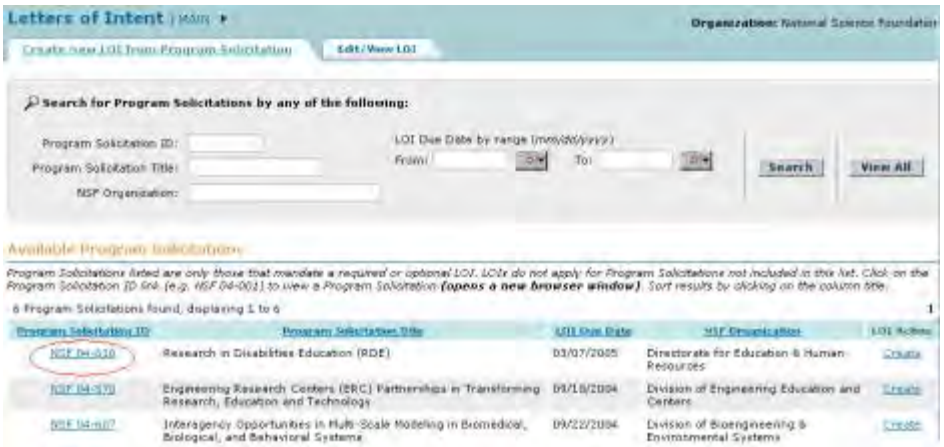

Figure 1 Letters of Intent screen on the Create New LOI from Program Solicitation tab. The Program Solicitation ID is circled for a solicitation.

2. In the **Available Program Solicitation** section, click the Program Solicitation ID (Figure 1) on the row of the Program Solicitation you want to view. The link for the solicitation displays in a new window (Figure 2).

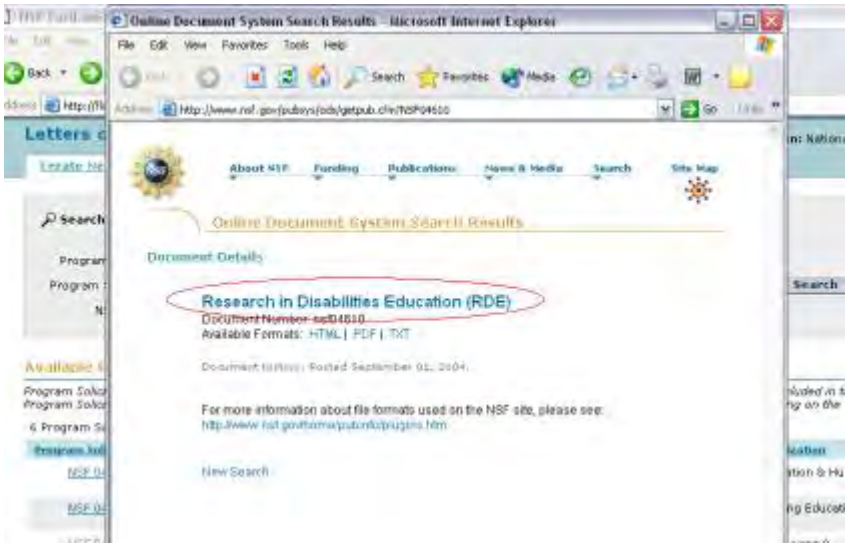

Figure 2 Program Solicitation link (circled) in a new window

3. In the new window, click the title of the solicitation (Figure 2). The solicitation displays in PDF format (Figure 3). You can also click on the link for the HTML or the text version to view the solicitation in either of those formats.

Figure 3 Text of the solicitation in the new window.

Note: If you need Adobe Reader to read the PDF file, click **Adobe Acrobat Reader** at the bottom of the **Letters of Intent** screen.

See also:

- View All Program Solicitations
- Search for Solicitations
- Step 3 Complete the Letter of Intent

Step 3 Complete Letter of Intent Form

Step 3 Complete Letter of Intent

See What Information is Requested in the Letter of Intent? for an overview of the requested or required information.

1. Access the **Letters of Intent** screen on the **Create New LOI from Program Solicitation** tab (Figure 1) (see Access the Letters of Intent Screen as PI or Access the Letters of Intent Screen as an SPO/AOR).

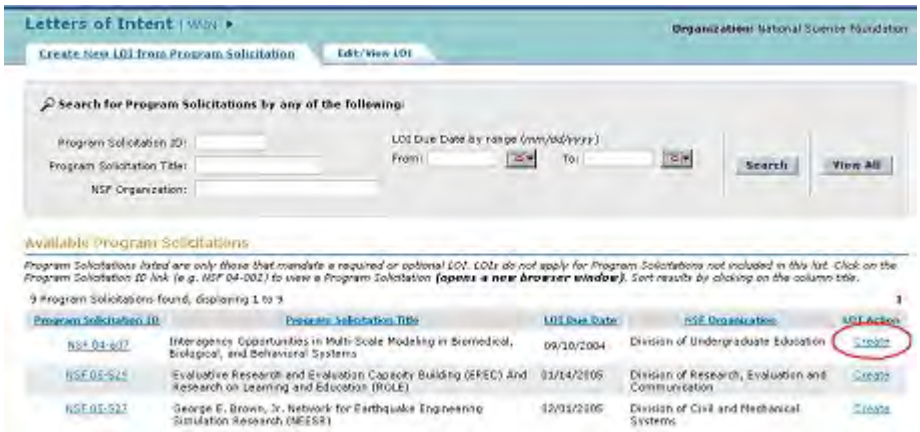

Figure 1 Letters of Intent screen on the Create New LOI from Program Solicitation tab. The Create link is circled.

2. Determine which solicitation you want to create a Letter of Intent for (see Search for Solicitations, View All Program Solicitations, and View a Program Solicitation).
3. In the **Available Program Solicitations** section of the **Letters of Intent** screen on the **Create New LOI from Program Solicitations** tab (Figure 1), click **Create** on the row for the solicitation that you want to create a Letter of Intent for. The **Create New LOI** screen displays (Figure 2).

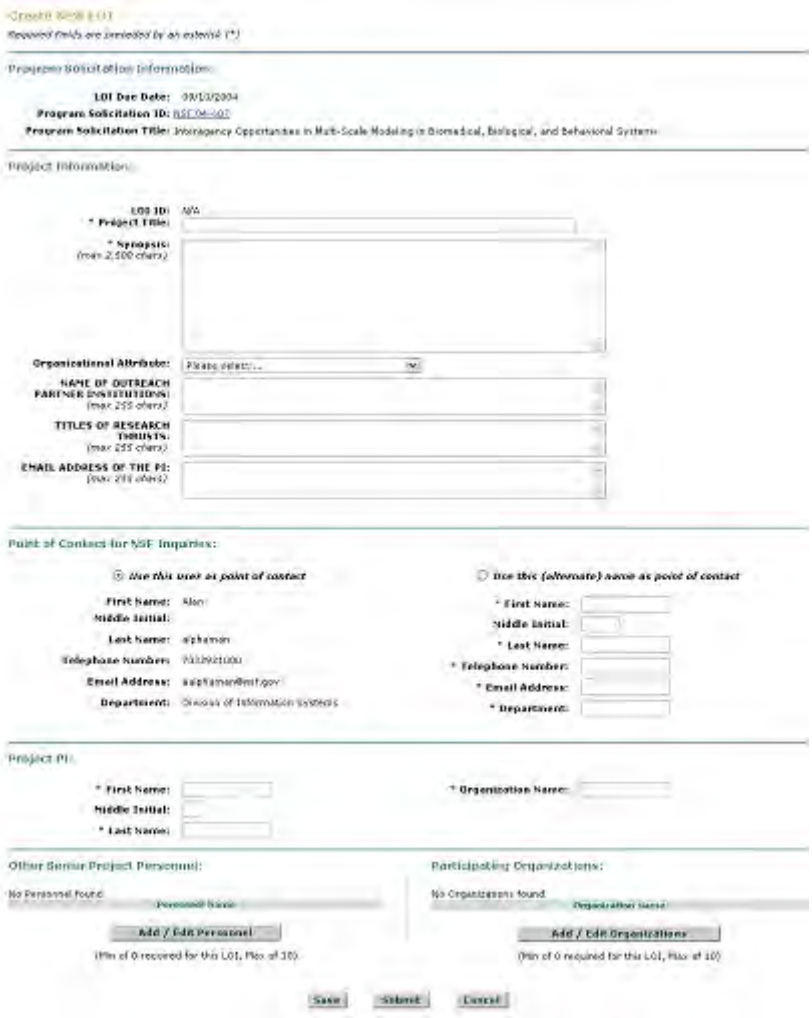

Figure 2 Create LOI screen.

4. In the **Project Information** section, in the **Project Title** box (Figure 2), type the Project Title of the Letter of Intent.
5. In the **Synopsis** box (Figure 2), type or copy and paste a synopsis of the proposed project.
6. From the **Organizational Attribute** drop-down list (Figure 2), choose the organizational attribute (optional).
7. Type messages to any or all of the following (Figure 2):
   - NSF division, NIH Institute, NASA, or DOE for the primary assignment (optional)
   - NSF division, NIH Institute, NASA, or DOE for the second assignment (optional)
   - The Program Officer who has expressed interest in the project (optional)
8. In the **Point of Contact for NSF Inquiries** section (Figure 2), click the radio button for either of the following:
   - Use this user as point of contact (individual's information is displayed already)
   - Use (alternate) name as point of contact
9. *If you use the alternate point of contact:*
   - In the **First Name** box (Figure 2), type the alternate's first name.
   - In the **Middle Initial** box (Figure 2), type the alternate's middle initial (optional).

- In the **Last Name** box (Figure 2), type the alternate's last name.
- In the **Telephone Number** box (Figure 2), type the alternate's telephone number.
- In the **Email Address** box (Figure 2), type the alternate's email address.

10. In the **Project PI** section (Figure 2), type the following:
    - In the **First Name** box, type the PI's first name.
    - In the **Middle Initial** box, type the PI's middle initial (optional).
    - In the **Last Name** box, type the PI's last name.
    - In the **Organization** box, type the name of your organization.
11. In the **Other Senior Project Personnel** section (Figure 2), *if you need to change information on Senior Personnel or add or delete Senior Personnel*, click the **Add/Edit Personnel** button. See Add/Edit Personnel for instructions.
12. In the **Participating Organizations** section (Figure 2), *if you need to add or delete participating organizations*, click the **Add/Edit Organizations** button. See Add/Edit Organizations for instructions.
13. After you have completed the Letter of Intent, you have these options:
    - Save the Letter of Intent
    - Forward the Letter of Intent to the SPO (PI only)
    - Submit the Letter of Intent (AOR for all Letters of Intent and PI for some types of Letters of Intent)

Step 3 Complete Letter of Intent

See What Information is Requested in the Letter of Intent? for an overview of the requested or required information.

1. Access the **Letters of Intent** screen on the **Create New LOI from Program Solicitation** tab (Figure 1) (see Access the Letters of Intent Screen as PI or Access the Letters of Intent Screen as an SPO/AOR).

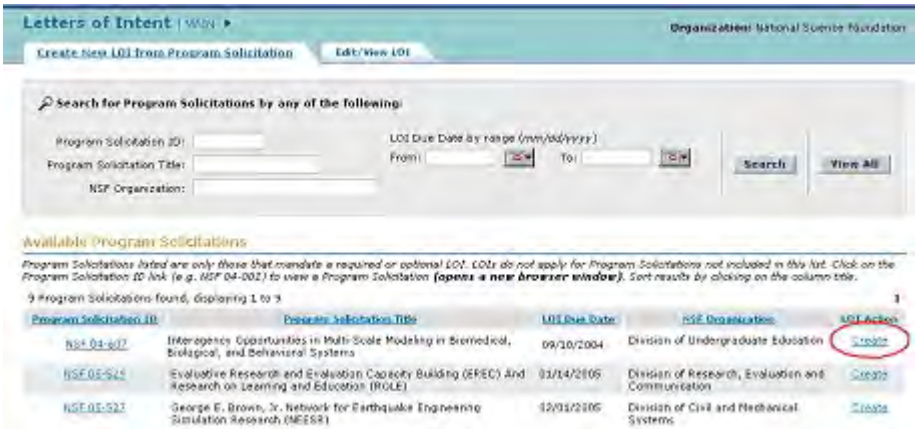

Figure 1 Letters of Intent screen on the Create New LOI from Program Solicitation tab. The Create link is circled.

2. Determine which solicitation you want to create a Letter of Intent for (see Search for Solicitations, View All Program Solicitations, and View a Program Solicitation).
3. In the **Available Program Solicitations** section of the **Letters of Intent** screen on the **Create New LOI from Program Solicitations** tab (Figure 1), click **Create** on the row

for the solicitation that you want to create a Letter of Intent for. The **Create New LOI** screen displays (Figure 2).

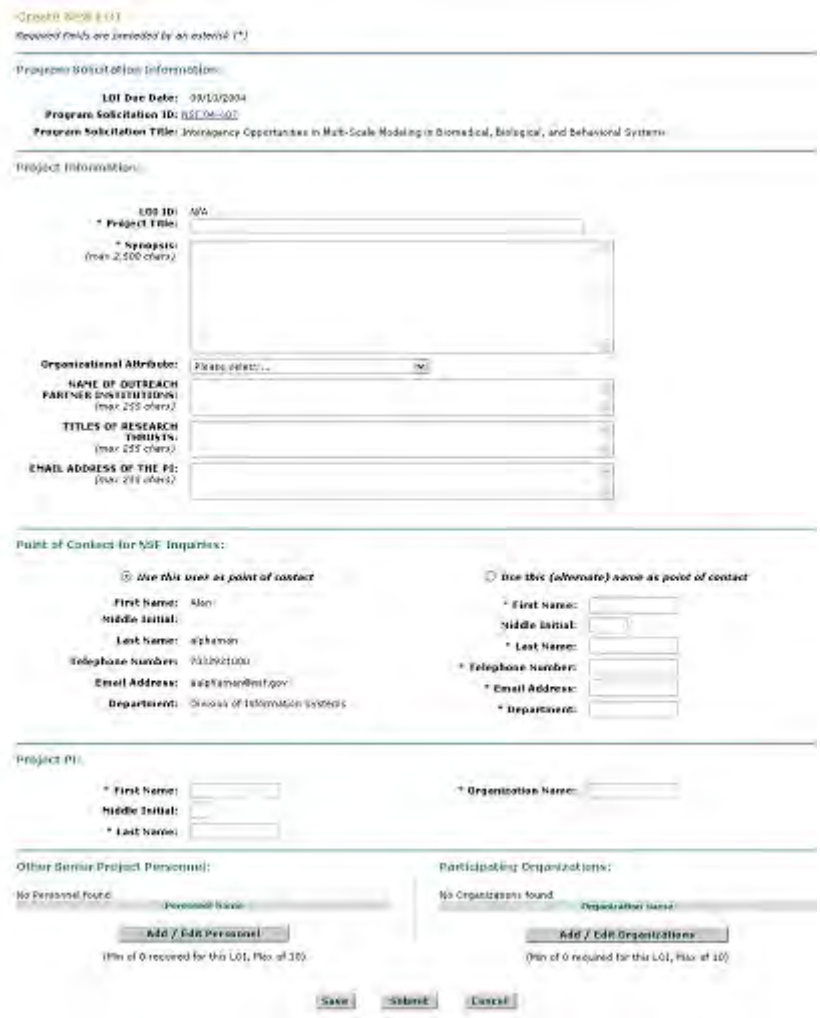

Figure 2 Create LOI screen.

4. In the **Project Information** section, in the **Project Title** box (Figure 2), type the Project Title of the Letter of Intent.
5. In the **Synopsis** box (Figure 2), type or copy and paste a synopsis of the proposed project.
6. From the **Organizational Attribute** drop-down list (Figure 2), choose the organizational attribute (optional).
7. Type messages to any or all of the following (Figure 2):
   - NSF division, NIH Institute, NASA, or DOE for the primary assignment (optional)
   - NSF division, NIH Institute, NASA, or DOE for the second assignment (optional)
   - The Program Officer who has expressed interest in the project (optional)
8. In the **Point of Contact for NSF Inquiries** section (Figure 2), click the radio button for either of the following:
   - Use this user as point of contact (individual's information is displayed already)

- Use (alternate) name as point of contact

9. *If you use the alternate point of contact:*
   - In the **First Name** box (Figure 2), type the alternate's first name.
   - In the **Middle Initial** box (Figure 2), type the alternate's middle initial (optional).
   - In the **Last Name** box (Figure 2), type the alternate's last name.
   - In the **Telephone Number** box (Figure 2), type the alternate's telephone number.
   - In the **Email Address** box (Figure 2), type the alternate's email address.
10. In the **Project PI** section (Figure 2), type the following:
    - In the **First Name** box, type the PI's first name.
    - In the **Middle Initial** box, type the PI's middle initial (optional).
    - In the **Last Name** box, type the PI's last name.
    - In the **Organization** box, type the name of your organization.
11. In the **Other Senior Project Personnel** section (Figure 2), *if you need to change information on Senior Personnel or add or delete Senior Personnel*, click the **Add/Edit Personnel** button. See Add/Edit Personnel for instructions.
12. In the **Participating Organizations** section (Figure 2), *if you need to add or delete participating organizations*, click the **Add/Edit Organizations** button. See Add/Edit Organizations for instructions.
13. After you have completed the Letter of Intent, you have these options:
    - Save the Letter of Intent
    - Forward the Letter of Intent to the SPO (PI only)
    - Submit the Letter of Intent (AOR for all Letters of Intent and PI for some types of Letters of Intent)

What Information is Requested in the Letter of Intent?

Solicitations vary in their requirements for a Letter of Intent. FastLane displays only those information fields that are required for the solicitation you are creating the Letter of Intent for.

All Letters of Intent request this information:

- Title of the project
- Synopsis of the project
- Confirmation of the point of contact for NSF inquiries
- The name and relevant information of the project PI

The Letters of Intent for some Solicitations may also display fields for any or all of the following:

- Comments other than the Synopsis (always optional)
- Answers to one to three questions that the Program Officer presents for that solicitation
- Selection of an organizational attribute for your organization
- Selection of Primary Division, Secondary Division, and Tertiary Division for cross-directorate/multi-disciplinary Letters of Intent
- Sending messages to the Program Officer
- Sending messages to relevant NSF divisions or other agencies for the primary and second assignment

The Letter of Intent also may provide the opportunity to do the following:

- Add or edit the information for Senior Personnel
- Add or edit the information for organizations

See Complete the Letter of Intent for instructions on how to work on the Letter of Intent.

Add/Edit Personnel

1. Access the **Create New LOI** screen (Figure 1) (see Complete the Letter of Intent).

Figure 1 Create LOI screen. The Add/Edit Personnel button is circled.

2. In the **Other Senior Personnel** section (Figure 1), click the **Add/Edit Personnel** button. The **Create LOI—Add/Edit Other Senior Personnel** screen displays (Figure 2).
3. In the **Other Senior Personnel** section (Figure 2), complete the following:
   - In the **First Name** box, type the Senior Person's first name.
   - In the **Middle Initial** box, type the Senior Person's middle initial (optional).
   - In the **Last Name** box, type the Senior Person's last name.

- In the **Organization Name** box, type the Senior Person's organization.
- In the **Department** box, type the Senior Person's department.
- In the **City** box, type the city of the Senior Person's organization.
- In the **State** box, select the state of the organization from the drop-down list (required for United States only).
- In the **Country** box, select the country of the organization from the drop-down list.

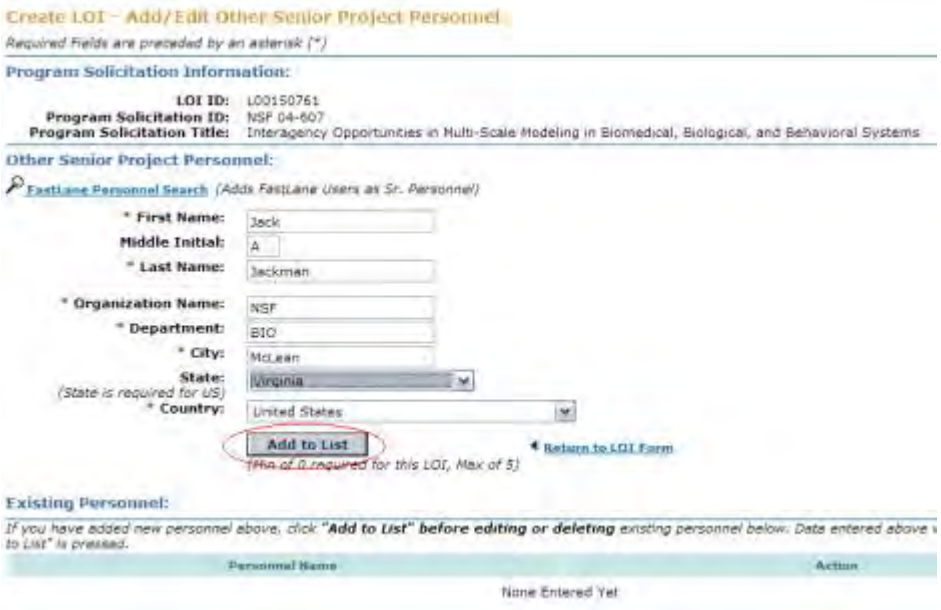

Figure 2 Create LOI—Add/Edit Other Senior Personnel screen. The Add to List button is circled.

4. Click the **Add to List** button (Figure 2). The **Create the LOI—Add/Edit Other Senior Personnel** screen displays (Figure 3) again with the name of the added individual listed in the **Existing Personnel** section. You have two new options:
   - Edit the Senior Person's information
   - Delete a Senior Person

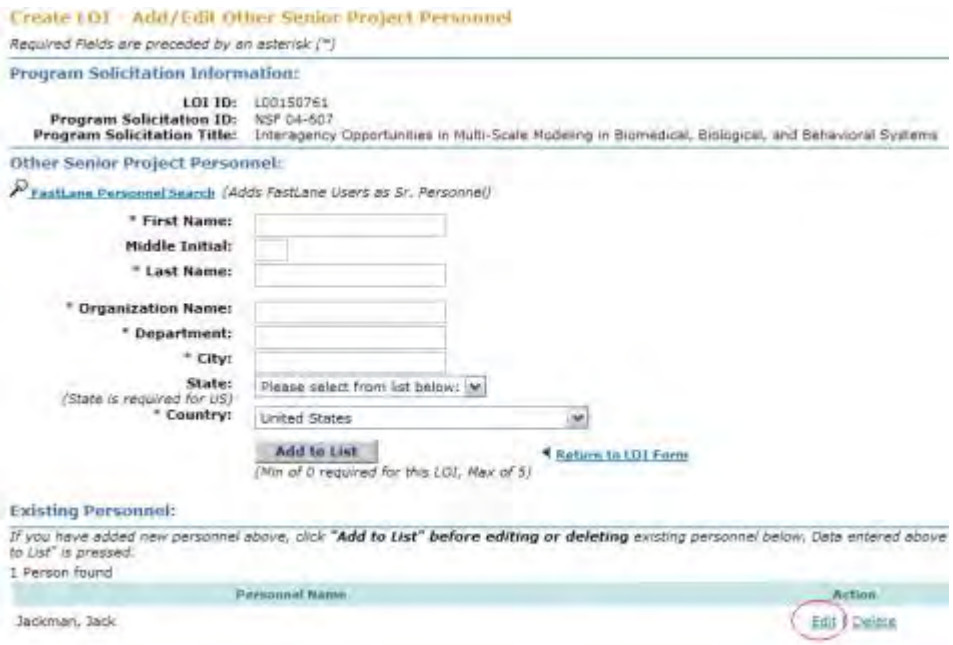

Figure 3 Create LOI—Add/Edit Other Senior Personnel screen. The Edit link is circled.

Edit the Senior Person's Information

1. On the **Create LOI—Add/Edit Other Senior Personnel** screen (Figure 3), click **Edit**. The **Create LOI—Add/Edit Other Senior Personnel** screen displays (Figure 4) with the Senior Person's information.

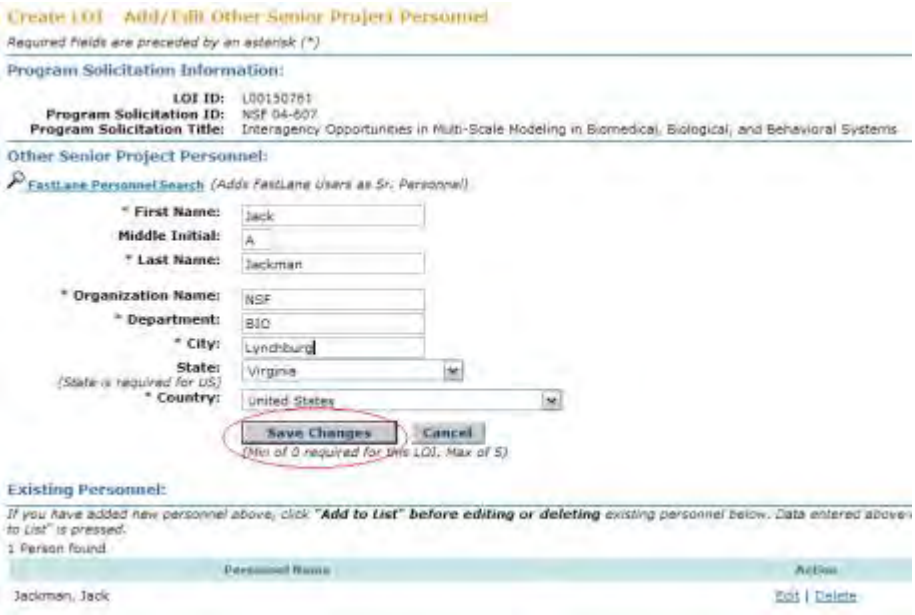

Figure 4 Create LOI—Add/Edit Other Senior Personnel screen. The Save Changes button is circled.

2. Edit the information as you require (see Step 3, Add/Edit Personnel).
3. Click the **Save Changes** button (Figure 4). The **Create LOI—Add/Edit Other Senior Personnel** screen displays again.

Delete the Senior Person

On the **Create LOI—Add/Edit Other Senior Personnel** screen (Figure 5), click **Delete** in the row for the Senior Person whose name you want to delete. The **Create LOI—Add/Edit Other Senior Personnel** screen displays (Figure 6) with the Senior Person's name no longer listed in the **Existing Personnel** section.

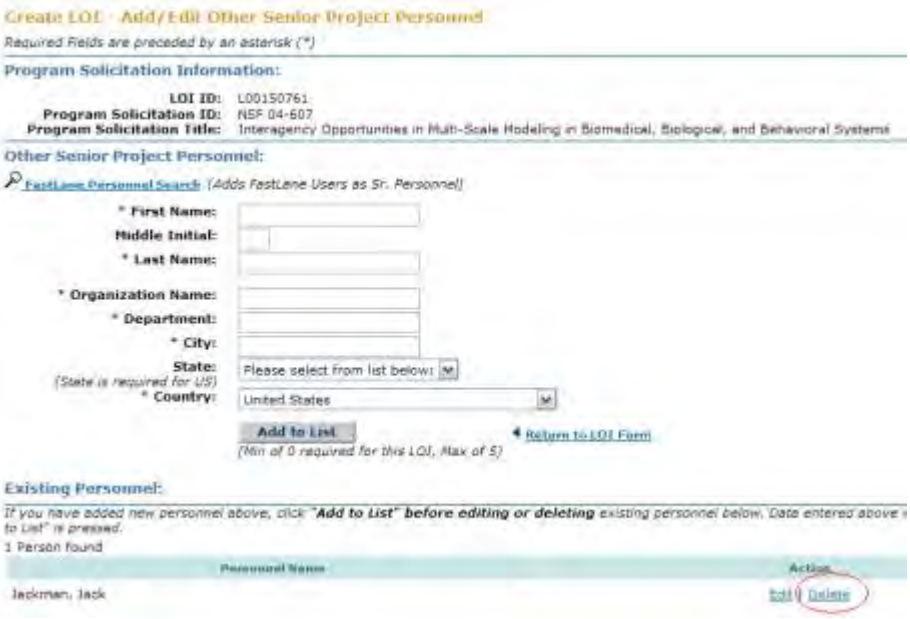

Figure 5 Create LOI—Add/Edit Other Senior Personnel screen. The Delete link is circled.

Figure 6 Create LOI—Add/Edit Other Senior Personnel screen with the Senior Person's name no longer listed in the Existing Personnel section.

See Step 3 Complete the Letter of Intent.

Add/Edit Organizations

1. Access the **Create New LOI** screen (Figure 1) (see Complete the Letter of Intent).

Figure 1 Create New LOI screen. The Add/Edit Organizations button is circled.

2. In the **Participating Organizations** section (Figure 1), click the **Add/Edit Organizations** button. The **Create LOI—Add/Edit Participating Organizations** screen displays (Figure 2).

Figure 2 Create LOI—Add/Edit Participating Organizations screen. The FastLane Organization Search link is circled.

3. Click **FastLane Organization Search** (Figure 2) to find the name of the participating organization as it is registered with FastLane. The **FastLane Organization Search** screen displays (Figure 3).

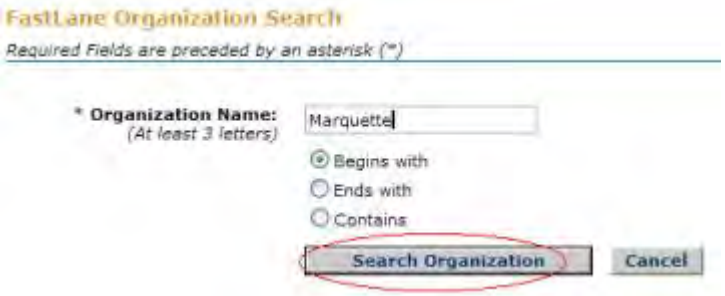

Figure 3 FastLane Organization Search screen. The Search Organization button is circled.

4. In the **Organization Name** box (Figure 3), type at least three letters of the organization you are searching for.
5. Click the radio button for one of the following search criteria (Figure 3):
   - **Begins with** returns all organizations whose name begins with the text entered.
   - **Ends with** returns all organizations whose name ends with the text entered.
   - **Contains** returns all organizations whose name contains the text entered.
6. Click the **Search Organization** button (Figure 3). The **FastLane Organization Search Result** screen displays (Figure 4) with a list of the organizations that meet your search criteria.

Figure 4 FastLane Organization Search Result screen. The Select button is circled.

7. Click the radio button next to an organization name to select an organization (Figure 4).
8. Click the **Select** button (Figure 4). The **Create LOI—Add/Edit Participating Organization** screen displays (Figure 5) with the name of the organization in the **Organization Name** box.

Figure 5 Create LOI—Add/Edit Participating Organization screen. The Add to List button is circled.

9. Click the **Add to List** button (Figure 5). The **Create LOI—Add/Edit Participating Organization** screen displays (Figure 6) with the name of the organization listed in the **Existing Organizations** section. You now have the option to delete the organization.

Figure 6 Create LOI—Add/Edit Participating Organization screen. The Delete button is circled.

Delete an Organization

On the **Create LOI—Add/Edit Participating Organization** screen (Figure 6), in the **Existing Organizations** section, click **Delete** on the row of the organization you want to delete. The **Create LOI—Add/Edit Participating Organization** screen displays (Figure 7) with the organization's name removed from the **Existing Organizations** section.

Figure 7 Create LOI—Add/Edit Participating Organization screen with the name of the organization no longer listed in the Existing Organizations section.

See Step 3 Complete the Letter of Intent.

Step 4 Process a New Letter of Intent

Step 4 Process a New Letter of Intent

There are three ways to process a newly created Letter of Intent:

- Save a new Letter of Intent
- Forward a new Letter of Intent to the SPO (PI only)
- Submit a Letter of Intent (AOR only)

Step 4 Process a New Letter of Intent

There are three ways to process a newly created Letter of Intent:

- Save a new Letter of Intent
- Forward a new Letter of Intent to the SPO (PI only)
- Submit a Letter of Intent (AOR only)

Save a New Letter of Intent

1. Access the **Create New LOI** screen (Figure 1) and complete the Letter of Intent information (see Complete the Letter of Intent).

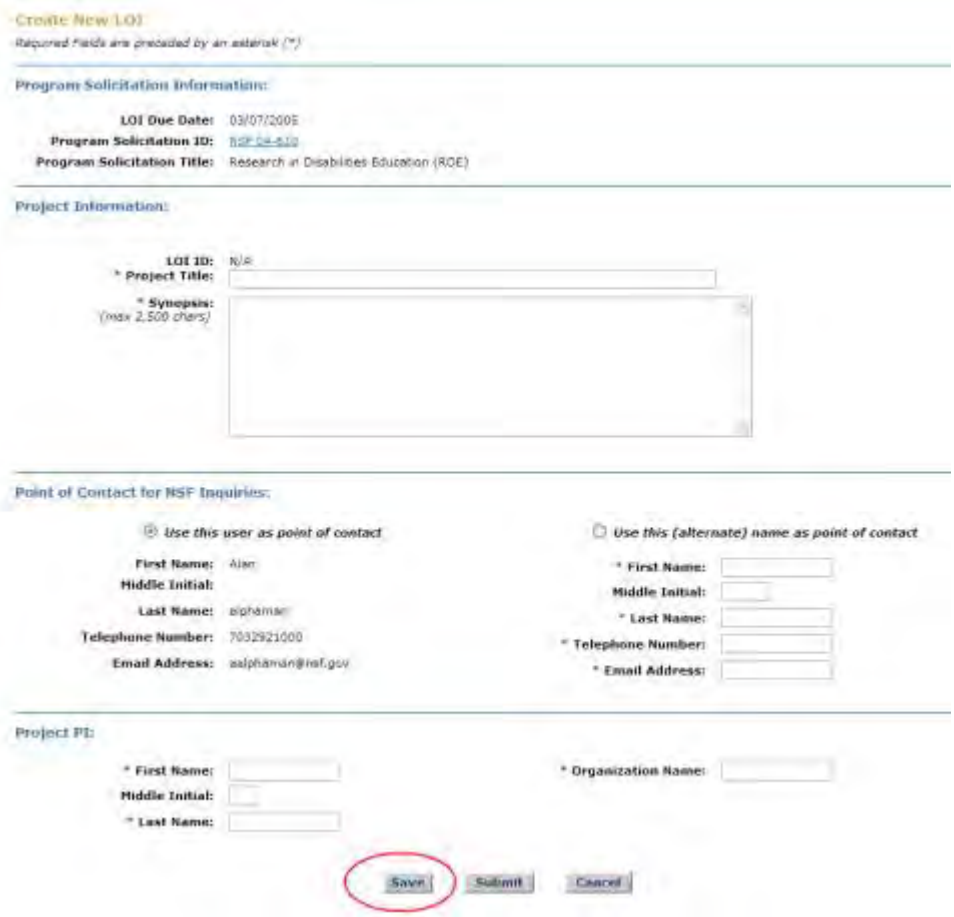

Figure 1 Create New LOI screen. The Save button is circled.

2. Click the **Save** button (Figure 1). The **Confirmation LOI Saved** screen displays (Figure 2) with the message that the Letter of Intent is now saved. The Letter of Intent is now listed in the **LOI Work in Progress** section of the **Letters of Intent** screen on the **Edit/View LOI** tab (Figure 3). To work on the Letter of Intent again, see Access

Saved or Submitted Letters of Intent as a PI or Access Saved or Submitted Letters of Intent as an SPO/AOR.

Figure 2 Confirmation LOI Saved screen.

Figure 3 Letters of Intent screen on the Edit/View LOI tab. In the LOI Work in Progress section, the newly saved Letter of Intent is circled.

See also:

- Forward a New Letter of Intent to the SPO
- Submit a New Letter of Letter

Forward a New Letter of Intent to the SPO

Only the PI has the option to forward a Letter of Intent to the SPO.

1. Access the **Create New LOI** screen (Figure 1) and complete the Letter of Intent (see Complete the Letter of Intent).

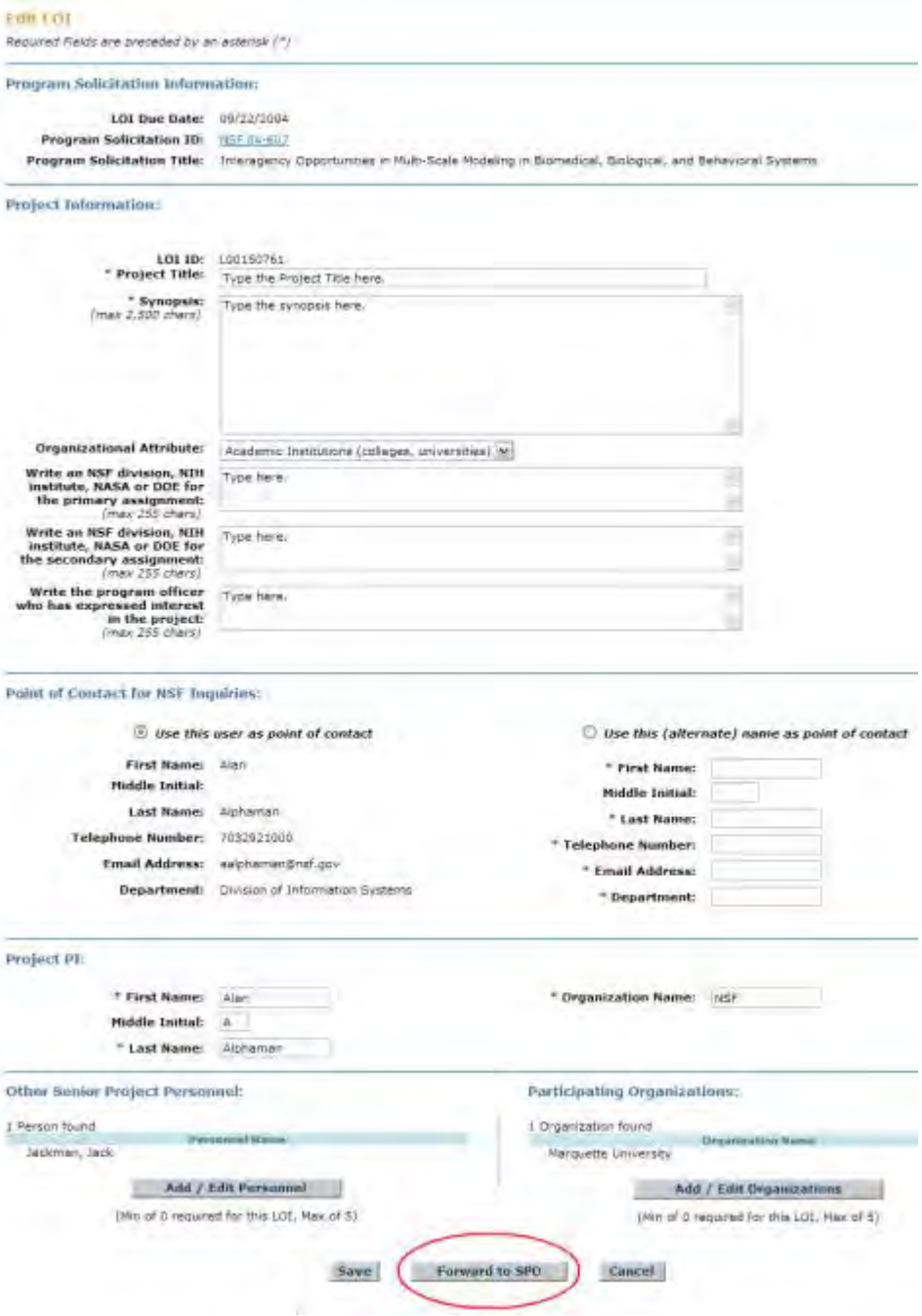

Figure 1 Create LOI screen. The Forward to SPO button is circled.

2. Click the **Forward to SPO** button (Figure 1). The **Confirm LOI** screen displays (Figure 2) with a message for you to confirm that you want to forward the Letter of Intent to the SPO.

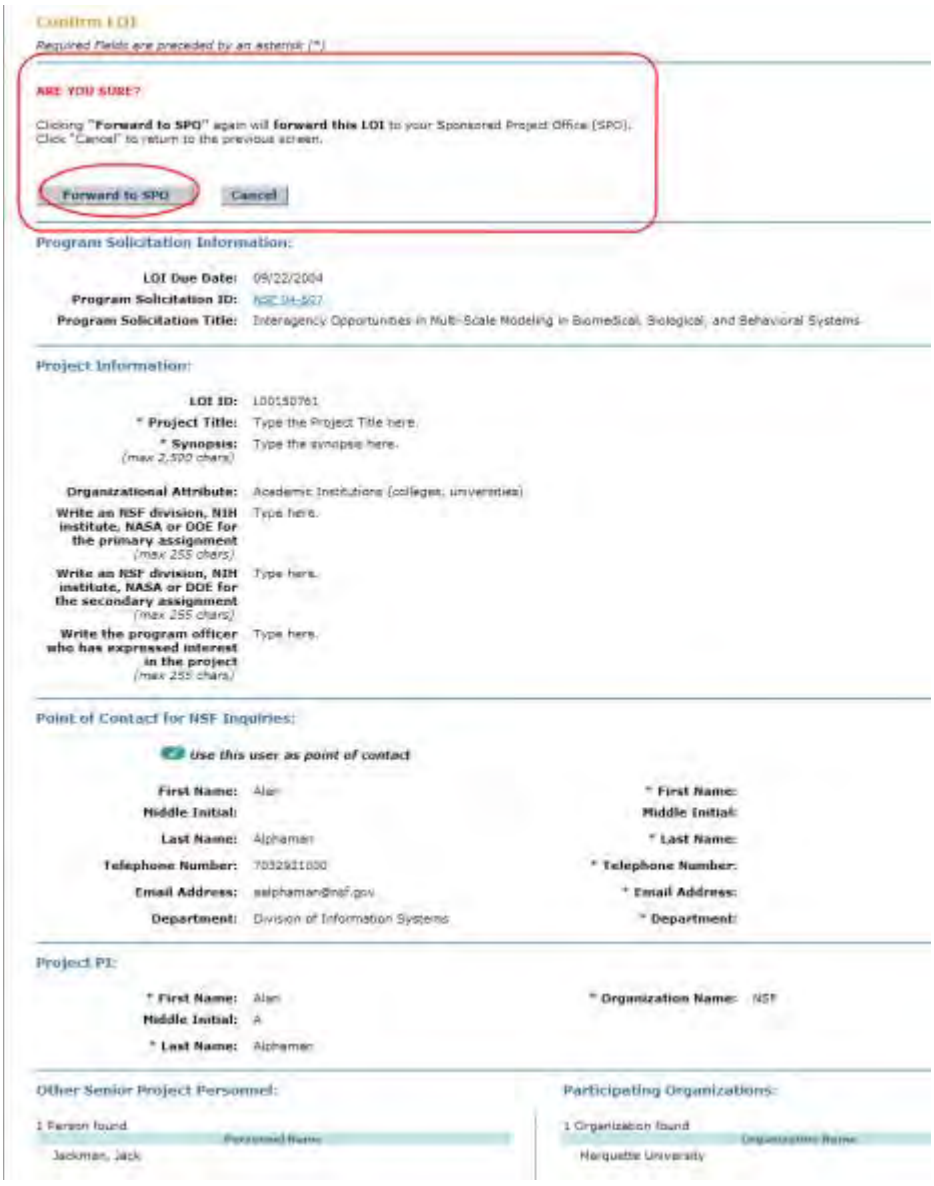

Figure 2 Confirm LOI screen. The Forward to SPO button is circled.

3. Click the **Forward to SPO** button (Figure 2). The **Confirmation LOI Forwarded to SPO** screen displays (Figure 3) with the message that the Letter of Intent has been forwarded to the SPO.

Figure 3 Confirmation LOI Forwarded to SPO screen.

See also:

- Save a New Letter of Intent
- Submit a New Letter of Intent

Submit a New Letter of Intent

An AOR may submit any Letter of Intent.

A PI may directly submit Letters of Intent for certain types of solicitations. If a PI can submit a Letter of Intent, the **Submit to NSF** button displays, rather than the **Forward to SPO** button, on the **Create New LOI** screen.

1. Access the **Create New LOI** screen (Figure 1) and complete the Letter of Intent information (see Complete the Letter of Intent).

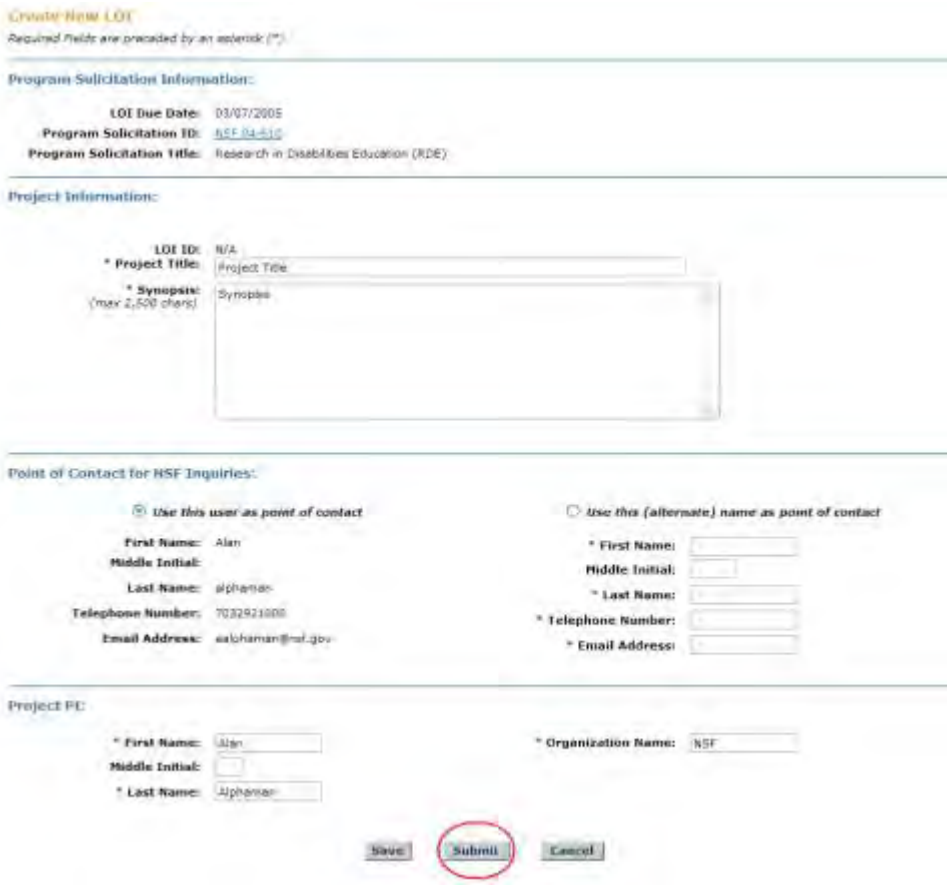

Figure 1 Create New LOI screen. The Submit button is circled.

2. Click the **Submit** button (Figure 1). The **Confirm LOI** screen displays (Figure 2) with a message for you to confirm that you want to submit the Letter of Intent to NSF.

Figure 2 Confirm LOI screen. The Submit button is circled.

3. Click the **Submit** button (Figure 2). The **Confirmation LOI Submitted to NSF** screen displays (Figure 3) with the message that the Letter of Intent has been submitted.

Figure 3 Confirmation LOI Submitted to NSF screen.

See also:

- Save a New Letter of Intent
- Forward a New Letter of Intent to the SPO

Work on Saved and Submitted Letters of Intent

Work on Saved and Submitted Letters of Intent

You have these options in working on saved and submitted Letters of Intent:

- Search for Letters of Intent
- View Letters of Intent
- View a Program Solicitation for a Letter of Intent
- Edit a Letter of Intent
- Forward a Letter of Intent to the SPO (PI only)
- Submit a Letter of Intent to NSF (AOR only)
- Return a Letter of Intent to the PI
- Delete a Letter of Intent

See Access Saved and Submitted Letters of Intent as a PI or Access Saved and Submitted Letters of Intent as an SPO/AOR to begin working.

Access Saved and Submitted Letters of Intent

Access Saved or Submitted Letters of Intent as a PI

1. On the **FastLane Home Page** screen, log in as a PI to Proposals, Status, and Awards (see PI/Co-PI Login). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management** screen displays (Figure 1).

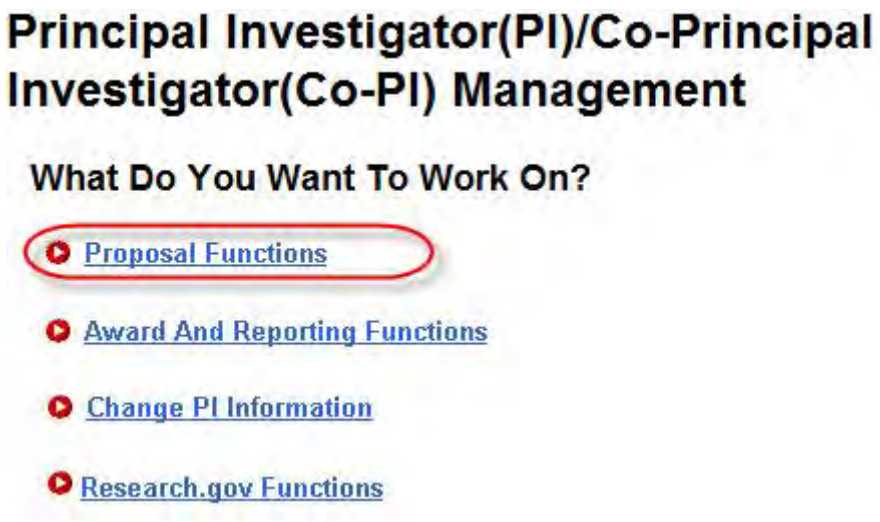

Figure 1 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management screen. The Proposal Functions link is circled.

2. Click **Proposal Functions** (Figure 1). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Proposal Functions** screen displays (Figure 2).

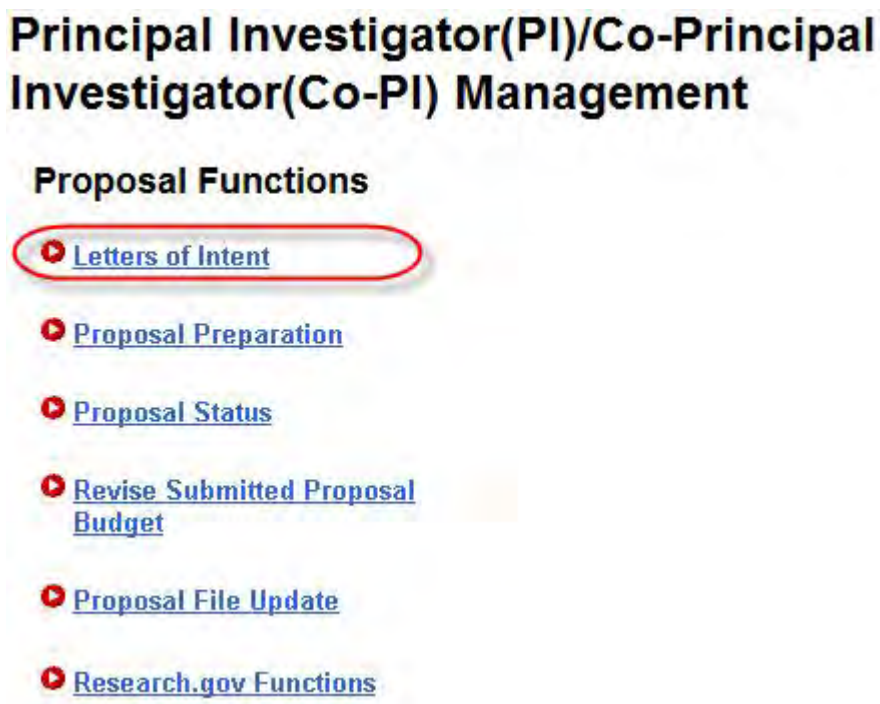

Figure 2 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Proposal Functions screen. The Letters of Intent link is circled.

3. Click **Letters of Intent** (Figure 2). The **Letters of Intent** screen displays on the **Create New LOI from Solicitation** tab (Figure 3).

Figure 3 Letters of Intent screen on the Create New LOI from Program Solicitation tab. The Edit/View LOI tab is circled.

4. Click the **Edit/View LOI** tab (Figure 3). The **Letters of Intent** screen displays on the **Edit/View LOI** tab (Figure 4). You have these options, depending upon the status of the Letter of Intent:
   - Search for Letters of Intent
   - Edit a Letter of Intent
   - Forward a Letter of Intent to the SPO or Submit a Letter of Intent to NSF
   - View a Letter of Intent in HTML format
   - View a Letter of Intent in PDF format
   - View a Program Solicitation for a Letter of Intent
   - Delete a Letter of Intent

   (Click on any link above to see instructions for that action.)

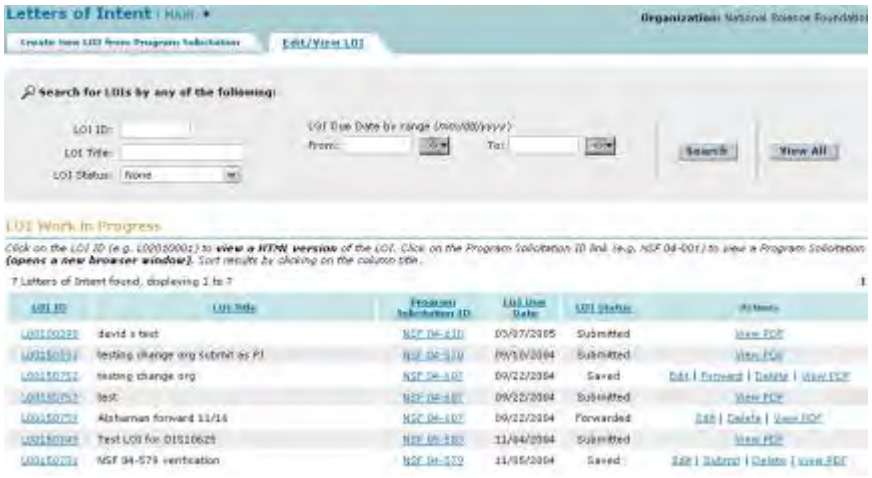

Figure 4 Letters of Intent screen on the Edit/View LOI tab.

See also:
- Search for Saved and Submitted Letters of Intent
- View Saved and Submitted Letters of Intent

Access Saved or Submitted Letters of Intent as an SPO/AOR

1. On the **FastLane Home Page** screen, log in to Research Administration (see SPO/AOR Login). The **Research Administration** screen displays (Figure 1).

Figure 1 Research Administration screen. The Letters of Intent link is circled.

2. Click **Letters of Intent** (Figure 1). The **Letters of Intent** screen displays on the **Edit/View LOI** tab (Figure 2). You have these options on this screen:
   - Search for Letters of Intent
   - Edit a Letter of Intent
   - Submit a Letter of Intent to NSF (AOR only)
   - Return a Letter of Intent to the PI
   - View a Letter of Intent in HTML format
   - View a Letter of Intent in PDF format
   - View a Program Solicitation for a Letter of Intent
   - Delete a Letter of Intent

   (Click on any link above to see instructions for that action.)

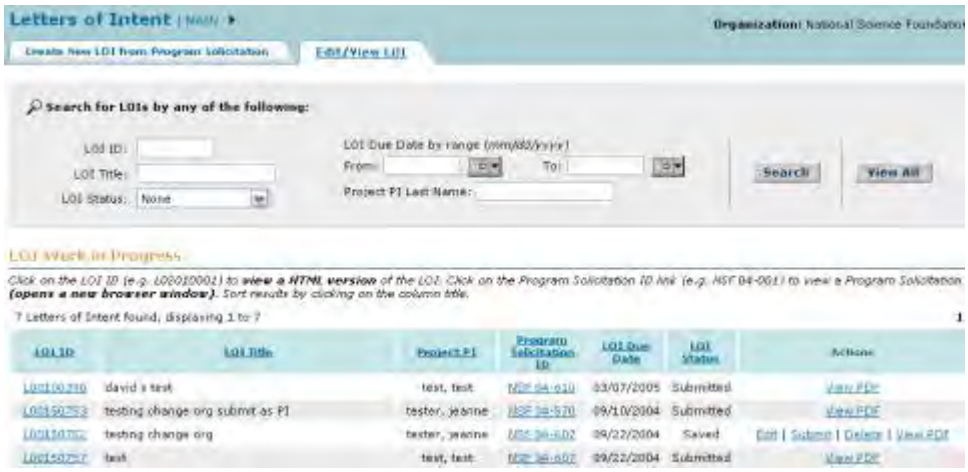

Figure 2 Letters of Intent screen on the Edit/View LOI tab.

See also:

- Search for Saved and Submitted Letters of Intent
- View Saved and Submitted Letters of Intent

Search for Saved and Submitted Letters of Intent

Search for Saved and Submitted Letters of Intent

Search for saved and submitted Letters of Intent by role:

- As a PI
- As an SPO/AOR

Search for Saved and Submitted Letters of Intent

Search for saved and submitted Letters of Intent by role:

- As a PI
- As an SPO/AOR

Search for Letters of Intent as a PI

1. Access the **Letters of Intent** screen on the **Edit/View LOI** tab (Figure 1) (see Access Saved or Submitted Letters of Intent as PI).

Figure 1 Letters of Intent screen on the Edit/View LOI tab. The Search button is circled.

2. In the **Search for LOIs** section (Figure 1), you can search for Letters of Intent by any one or a combination of the following:
   - **Letter of Intent ID**
     In the **LOI ID** box (Figure 1), type the Letter of Intent ID.
   - **Letter of Intent Title**
     In the **LOI Title** box (Figure 1), type the Letter of Intent title.
   - **LOI Status**
     Select the status you want to search for from the drop-down list (Figure 1).
   - **Letter of Intent Due Date Range**
     In the **From** box (Figure 1), type the start date for the date range.
     In the **To** box (Figure 1), type the end date for the date range.
3. Click the **Search** button (Figure 1). The **Letters of Intent** screen displays on the **Edit/View LOI** tab (Figure 2) with the results of your search in the **LOI Work in Progress** section.

Figure 2 Letters of Intent screen on the Edit/View LOI tab with the search results in the LOI Work in Progress section.

See also View Saved and Submitted Letters of Intent.

Search for Letters of Intent as an SPO/AOR

1. Access the **Letters of Intent** screen on the **Edit/View LOI** tab (Figure 1) (see Access Saved or Submitted Letters of Intent as SPO/AOR).

Figure 1 Letters of Intent screen on the Edit/View LOI tab. The Search button is circled.

2. In the **Search for LOIs** section (Figure 1), you can search for Letters of Intent by any one or a combination of the following:

- **Letter of Intent ID**
  In the **LOI ID** box (Figure 1), type the Letter of Intent ID.
- **Letter of Intent Title**
  In the **LOI Title** box (Figure 1), type the Letter of Intent title.
- **LOI Status**
  Select the status you want to search for from the drop-down list (Figure 1).
- **Letter of Intent Due Date Range**
  In the **From** box (Figure 1), type the start date for the date range.
  In the **To** box (Figure 1), type the end date for the date range.
- **Project PI Last Name**
  In the **Project PI Last Name** box (Figure 1), type the last name of the PI who forwarded the Letter of Intent.

3. Click the **Search** button (Figure 1). The **Letters of Intent** screen displays on the **Edit/View LOI** tab (Figure 2) with the results of your search in the **LOI Work in Progress** section.

Figure 2 Letters of Intent screen on the Edit/View LOI tab with the search results in the LOI Work in Progress section.

See also View Saved and Submitted Letters of Intent.

View Saved and Submitted Letters of Intent

There are three ways to view Letters of Intent:

- View all Letters of Intent
- View a Letter of Intent in HTML format
- View a Letter of Intent in PDF format

See also Search for Saved and Submitted Letters of Intent

View All Letters of Intent

1. Access the **Letters of Intent** screen on the **Edit/View LOI** tab (Figure 1) (see Access Saved or Submitted Letters of Intent as a PI or Access Saved or Submitted Letters of Intent as an SPO/AOR).

Figure 1 Letters of Intent screen on the Edit/View LOI tab. The View All button is circled.

2. Click the **View All** button (Figure 1). The **Letters of Intent** screen displays on the **Edit/View LOI** tab (Figure 2) with a full listing of all Letters of Intent in the **LOI Work in Progress** section:
   - For the PI, all Letters of Intent created by the PI, including Letters of Intent that have been forwarded to the SPO or submitted to NSF
   - For the SPO/AOR, all Letters of Intent created by the SPO's organization

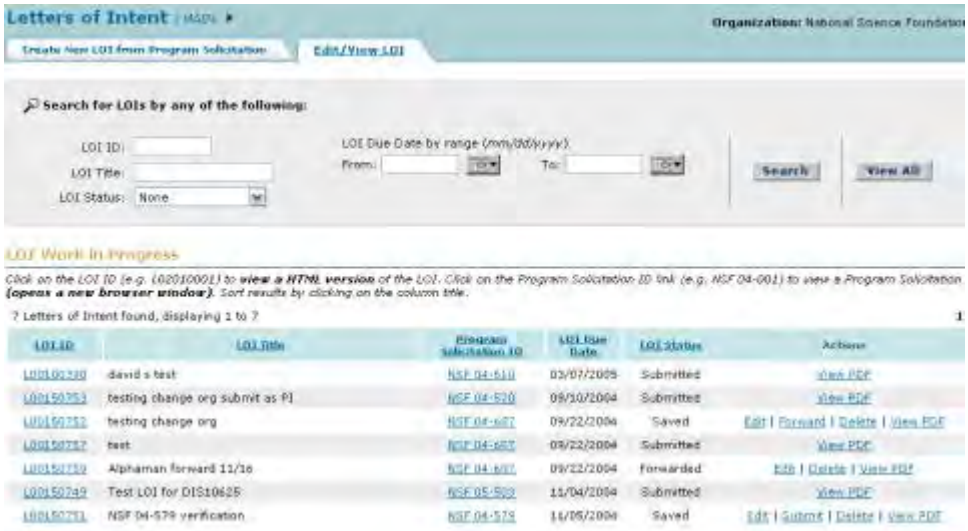

Figure 2 Letters of Intent screen on the Edit/View tab with a full listing of all Letters of Intent.

See also:

- View a Letter of Intent in HTML Format
- View a Letter of Intent in PDF Format

View a Letter of Intent in HTML Format

1. Access the **Letters of Intent** screen on the **Edit/View LOI** tab (Figure 1) (see Access Saved or Submitted Letters of Intent as a PI or Access Saved or Submitted Letters of Intent as an SPO/AOR).

Figure 1 Letters of Intent screen on the Edit/View LOI tab. The LOI ID number is circled for a Letter of Intent.

2. In the **LOI Work in Progress** section (Figure 1), click the LOI ID number on the row for the Letter of Intent that you want to view in HTML format. The Letter of Intent displays (Figure 2).

Figure 2 Screen with the Letter of Intent displayed.

See also:

- View All Letters of Intent
- View a Letter of Intent in PDF Format

View a Letter of Intent in PDF Format

1. Access the **Letters of Intent** screen on the **Edit/View LOI** tab (Figure 1) (see Access Saved or Submitted Letters of Intent as a PI or Access Saved or Submitted Letters of Intent as an SPO/AOR).

Figure 1 Letters of Intent screen on the Edit/View tab. The View PDF link is circled for a Letter of Intent.

2. Click **View PDF** on the row for the Letter of Intent whose PDF you want to view (Figure 1). A new screen displays with the Letter of Intent in PDF format.

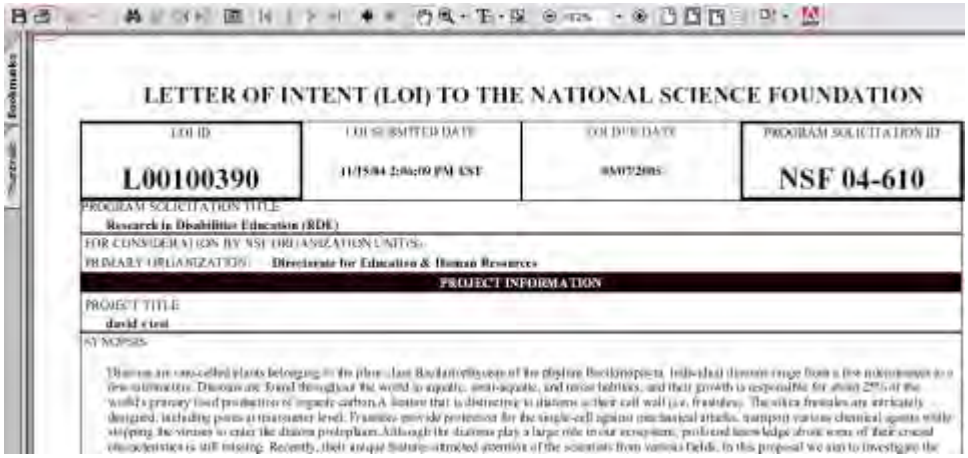

Figure 2 Screen with the Letter of Intent in PDF format.

3. Click the browser back button to return to the **Letters of Intent** screen on the **Edit/View LOI** tab (Figure 1).

Note: If you need Adobe Reader to read the PDF file, click **Adobe Acrobat Reader** at the bottom of the **Letters of Intent** screen (Figure 3).

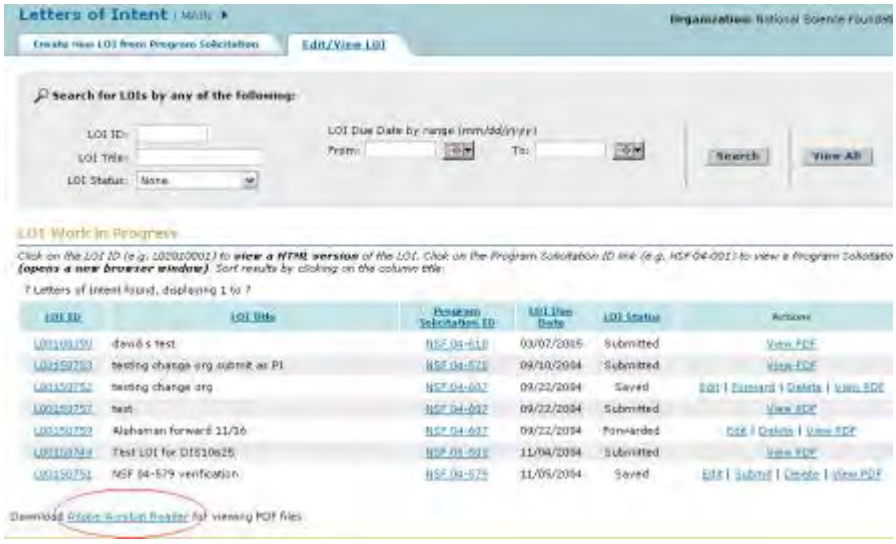

Figure 3 Letters of Intent screen on the Edit/View LOI tab. The Adobe Acrobat Reader link is circled.

See also:

- View All Letters of Intent
- View a Letter of Intent in HTML Format

View the Program Solicitation for a Letter of Intent

1. Access the **Letters of Intent** screen on the **Edit/View LOI** tab (Figure 1) (see Access Saved or Submitted Letters of Intent as a PI or Access Saved or Submitted Letters of Intent as an SPO/AOR).

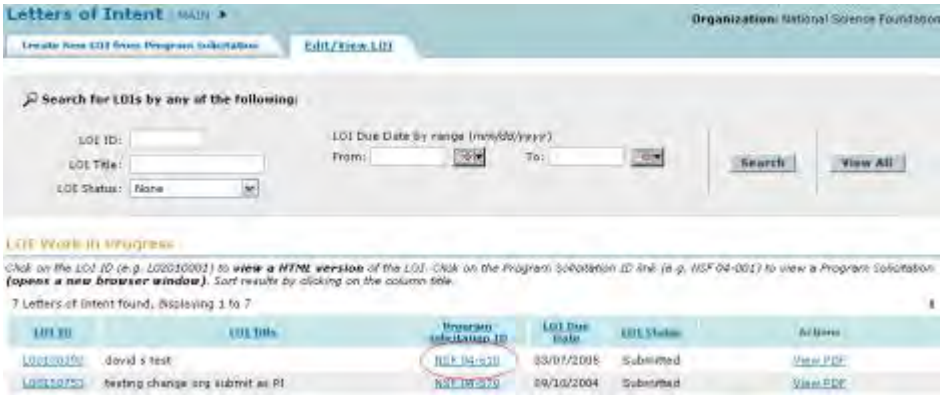

Figure 1 Letters of Intent screen on the Edit/View LOI tab. The Program Solicitation ID is circled for a Letter of Intent.

2. In the **LOI in Progress** section, click the Program Solicitation ID in the row for the Letter of Intent that you want to view the program solicitation for (Figure 1). The link for the solicitation displays in a new window (Figure 2).

Figure 2 Program Solicitation link (circled) in a new window

3. In the new window, click the title of the solicitation (Figure 2). The solicitation displays in PDF format (Figure 3). (You can also click the link for the HTML or the text version to view the solicitation in either of those formats.)

Figure 3 Text of the solicitation in the new window.

Note: If you need Adobe Reader to read the PDF file, click **Adobe Acrobat Reader** at the bottom of the **Letters of Intent** screen (Figure 4).

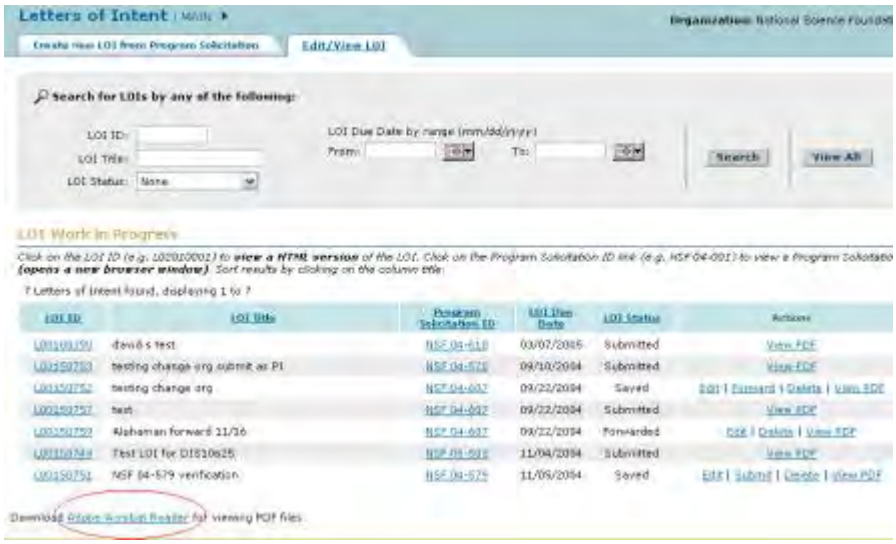

Figure 4 Letters of Intent screen on the Edit/View LOI tab. The Adobe Acrobat Reader link is circled.

See also:

- Edit a Saved Letter of Intent
- Forward a Saved Letter of Intent to the SPO
- Submit a Letter of Intent to NSF
- Return a Letter of Intent to the PI
- Delete a Letter of Intent

Edit a Saved Letter of Intent

1. Access the **Letters of Intent** screen on the **Edit/View LOI** tab (Figure 1) (see Access Saved or Submitted Letters of Intent as a PI or Access Saved or Submitted Letters of Intent as an SPO/AOR).

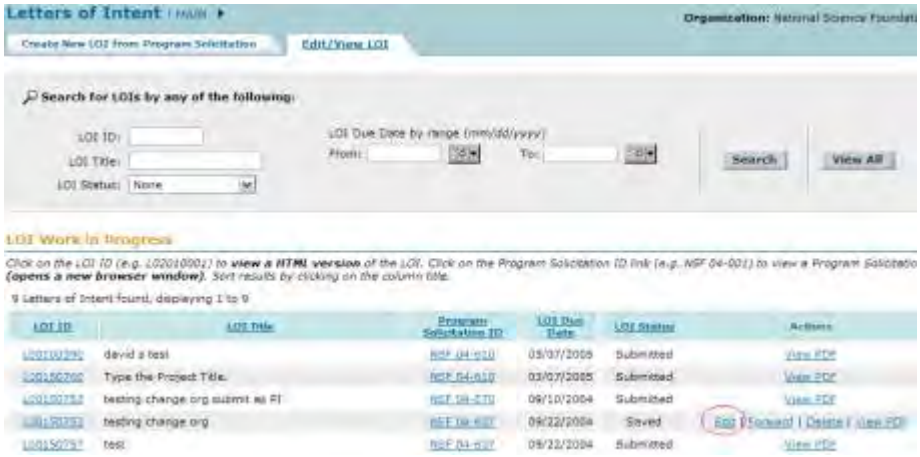

Figure 1 Letters of Intent screen on the Edit/View LOI. The Edit link is circled.

2. Click **Edit** (Figure 1) on the row for the Letter of Intent that you want to edit. The **Edit LOI** screen displays (Figure 2), and you can change any of the fields in the following steps.

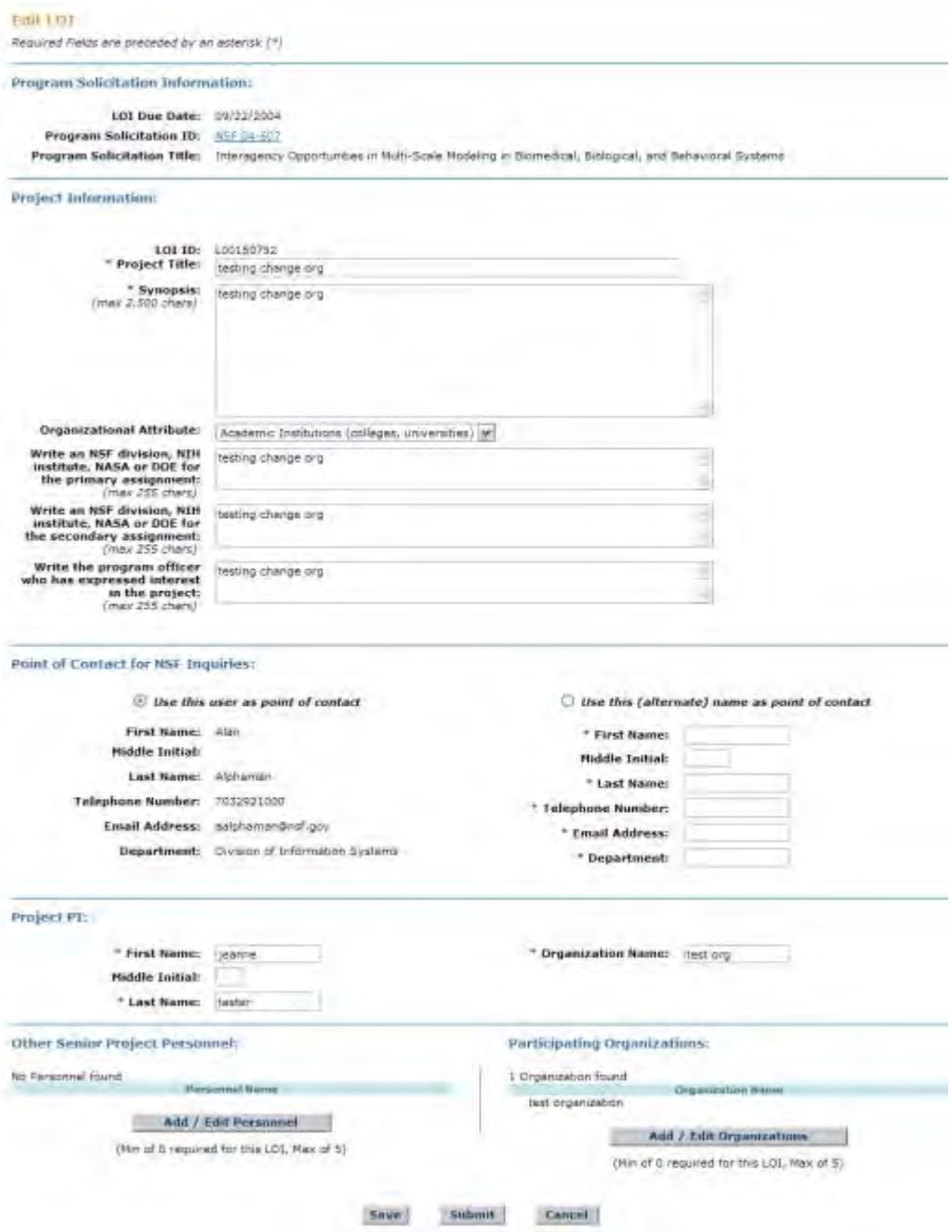

Figure 2 Edit LOI screen.

3. In the **Project Information** section, in the **Project Title** box (Figure 2), type the Project Title of the Letter of Intent.
4. In the **Synopsis** box (Figure 2), type or copy and paste a synopsis of the proposed project.

5. From the **Organizational Attribute** drop-down list (Figure 2), choose the organizational attribute (optional).
6. Type messages to any or all of the following (Figure 2):
   - NSF division, NIH Institute, NASA, or DOE for the primary assignment (optional)
   - NSF division, NIH Institute, NASA, or DOE for the second assignment (optional)
   - The Program Officer who has expressed interest in the project (optional)
7. In the **Point of Contact for NSF Inquiries** section (Figure 2), click the radio button for either of the following:
   - Use this user as point of contact (individual's information is displayed already)
   - Use (alternate) name as point of contact
8. *If you use the alternate point of contact:*
   - In the **First Name** box (Figure 2), type the alternate's first name.
   - In the **Middle Initial** box (Figure 2), type the alternate's middle initial (optional).
   - In the **Last Name** box (Figure 2), type the alternate's last name.
   - In the **Telephone Number** box (Figure 2), type the alternate's telephone number.
   - In the **Email Address** box (Figure 2), type the alternate's email address.
9. In the **Project PI** section (Figure 2), type the following:
   - In the **First Name** box, type the PI's first name.
   - In the **Middle Initial** box, type the PI's middle initial (optional).
   - In the **Last Name** box, type the PI's last name.
   - In the **Organization** box, type the name of your organization.
10. In the **Other Senior Personnel** section (Figure 2), *if you need to change information on Senior Personnel or add or delete Senior Personnel*, click the **Add/Edit Personnel** button. See Add/Edit Personnel for instructions.
11. In the **Participating Organizations** section (Figure 2), *if you need to add or delete participating organizations*, click the **Add/Edit Organizations** button. See Add/Edit Organizations for instructions.

See also:

- View the Program Solicitation for a Letter of Intent
- Forward a Saved Letter of Intent to the SPO
- Submit a Letter of Intent to NSF
- Return a Letter of Intent to the PI
- Delete a Letter of Intent

Forward a Saved Letter of Intent to the SPO/AOR

Only a PI may forward a Letter of Intent to the SPO.

1. Access the **Letters of Intent** screen on the **Edit/View LOI** tab (Figure 1) (see Access Saved or Submitted Letters of Intent as a PI).

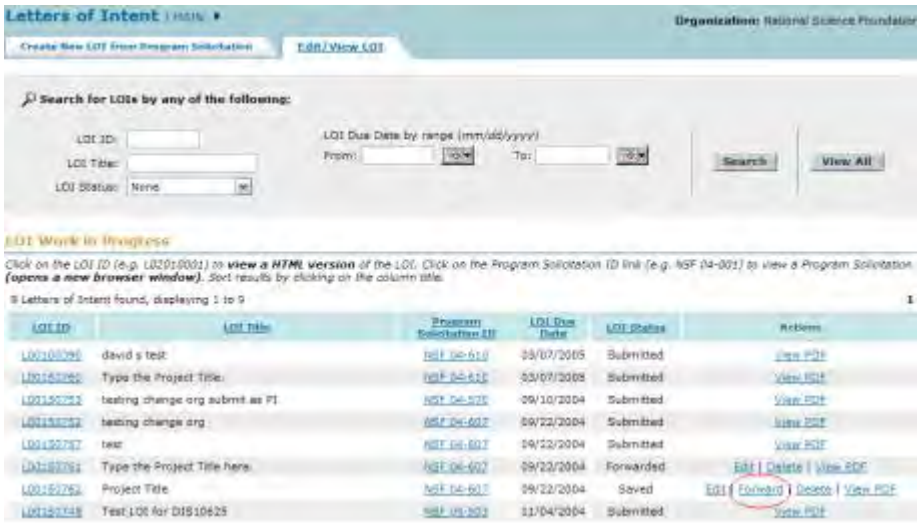

Figure 1 Letters of Intent screen on the Edit/View LOI tab. The Forward link is circled.

2. In the **LOI Work in Progress** section (Figure 1), click **Forward** on the row for the Letter of Intent that you want to forward to the SPO. The **Confirm LOI** screen displays (Figure 2) with a message for you to confirm that you want to forward the Letter of Intent to the SPO.

Figure 2 Confirm LOI screen with the message for you to confirm that you want to forward the Letter of Intent to the SPO. The Forward to SPO button is circled.

3. Click the **Forward to SPO** button (Figure 2). The **Confirmation LOI Forwarded to SPO** screen displays (Figure 3) with the message that the Letter of Intent has been forwarded to the SPO.

Figure 3 Confirmation LOI Forwarded to SPO screen.

See also:

- View the Program Solicitation for a Letter of Intent
- Edit a Saved Letter of Intent
- Submit a Letter of Intent to NSF
- Return a Letter of Intent to the PI
- Delete a Letter of Intent

Submit a Letter of Intent to NSF

A PI may submit certain types of Letters of Intent to NSF directly.

An AOR may submit any Letter of Intent.

1. Access the **Letters of Intent** screen on the **Edit/View LOI** tab (Figure 1) (see Access Saved or Submitted Letters of Intent as a PI or Access Saved or Submitted Letters of Intent as an SPO/AOR).

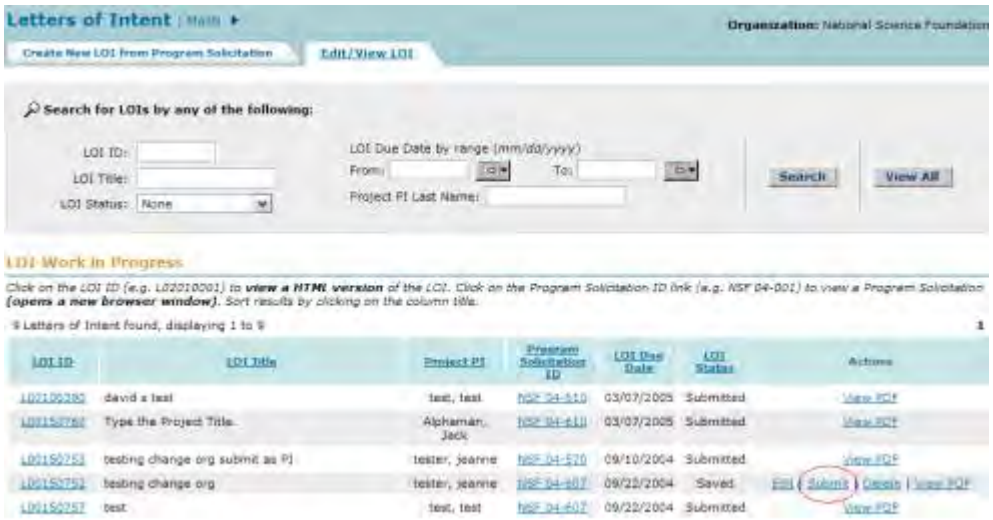

Figure 1 Letters of Intent screen on the Edit/View LOI tab. The Submit link is circled.

2. In the **LOI Work in Progress** section (Figure 1), click **Submit** on the row for the Letter of Intent you want to submit. The **Confirm LOI** screen displays (Figure 2) with the message for you to confirm that you want to submit the Letter of Intent.

Figure 2 Confirm LOI screen with a message for you to confirm that you want to submit the Letter of Intent to NSF.

3. Click the **Submit** button (Figure 2). The **Confirmation LOI Submitted to NSF** screen displays (Figure 3) with the message that the Letter of Intent has been submitted.

Figure 3 Confirmation LOI Submitted to NSF screen.

See also:

- View the Program Solicitation for a Letter of Intent
- Edit a Saved Letter of Intent
- Forward a Saved Letter of Intent to the SPO
- Return a Letter of Intent to the PI
- Delete a Letter of Intent

Return a Letter of Intent to the PI

Only an SPO may return a Letter of Intent to the PI.

1. Access the **Letters of Intent** screen on the **Edit/View LOI** tab (Figure 1) (see Access Saved or Submitted Letters of Intent as an SPO/AOR).

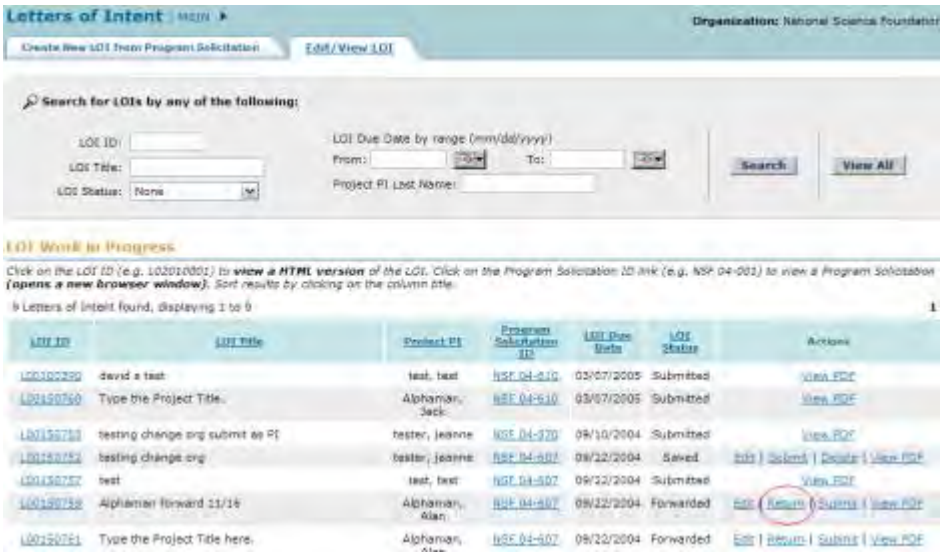

Figure 1 Letters of Intent screen on the Edit/View LOI tab. The Return link is circled.

2. In the **LOI Work in Progress** section (Figure 1), click **Return** on the row for the Letter of Intent that you want to return to the PI. The **Confirm LOI** screen displays (Figure 2) with a message for you to confirm that you want to return the Letter of Intent to the PI.

Figure 2 Confirm LOI screen with the message for you to confirm that you want to return the Letter of Intent to the PI. The Return to PI button is circled.

3. In the **Comments for PI** box (Figure 2), type a note to the PI on why you are returning the Letter of Intent (optional).

4. Click the **Return to PI** button (Figure 2). The **Confirmation LOI Returned to PI** screen displays (Figure 3) with the message that the Letter of Intent has been returned.

Figure 3 Confirmation LOI Returned to PI screen.

See also:

- View the Program Solicitation for a Letter of Intent
- Edit a Saved Letter of Intent
- Forward a Saved Letter of Intent to the SPO
- Submit a Letter of Intent to NSF
- Delete a Letter of Intent

Delete a Letter of Intent

An SPO/AOR may only delete a Letter of Intent that the SPO/AOR has created. An SPO cannot delete a Letter of Intent a PI has created.

1. Access the **Letters of Intent** screen on the **Edit/View LOI** tab (Figure 1) (see Access Saved or Submitted Letters of Intent as a PI or Access Saved or Submitted Letters of Intent as an SPO/AOR).

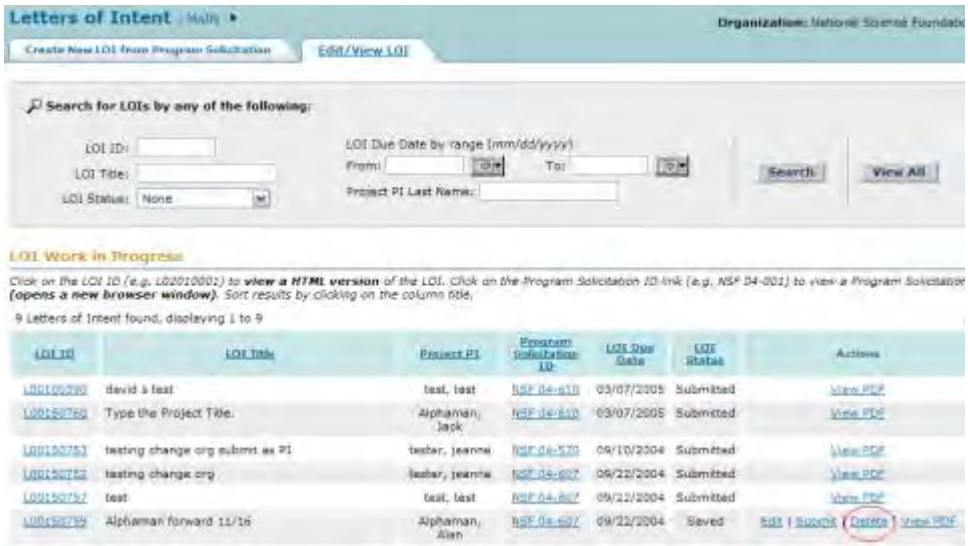

Figure 1 Letters of Intent screen on the Edit/View LOI tab. The Delete link is circled.

2. Click **Delete** (Figure 1) on the row for the Letter of Intent that you want to delete. The **Confirm LOI** screen displays (Figure 2) with a message for you to confirm that you want to delete the Letter of Intent.
3. Click the **Delete** button (Figure 2). The Letter of Intent is deleted, and the **Letters of Intent** screen displays on the **Edit/View LOI** tab.

Figure 2 Confirm LOI screen with a message for you to confirm that you want to delete the Letter of Intent. The Delete button is circled.

See also:

- View the Program Solicitation for a Letter of Intent
- Edit a Saved Letter of Intent
- Forward a Saved Letter of Intent to the SPO
- Submit a Letter of Intent to NSF
- Return a Letter of Intent to the PI

Prepare a Proposal

Prepare a Proposal Introduction

You must electronically prepare and submit a proposal to the NSF through either FastLane or Grants.gov. For instructions on submitting via Grants.gov, see the Grants.gov Application Guide.

For all instructions on the contents of a proposal, see the *Grant Proposal Guide (GPG)*, Chapter II.

Who Prepares and Submits Proposals?

These individuals may have roles in preparing and submitting a proposal:
- Principal Investigator (PI)
- Co-PIs
- Other Authorized Users (OAUs)
- Sponsored Project Office (SPO) representative
- Authorized Organizational Representative (AOR)

If you are a PI, you may take these actions in preparing and submitting a proposal:
- Create a proposal
- Edit a proposal
- Give your SPO access to view and edit the proposal
  - Give your AOR access to view, edit and submit the proposal

If you are an SPO, you may take these actions:
- View and edit a proposal forwarded by a PI

If you are an Authorized Organizational Representative (AOR), you may take these actions:
- View, edit and submit the proposal forwarded by a PI

An AOR must sign the proposal in the process of submitting it to NSF. See Submit and Sign a Proposal Introduction for instructions.

Prepare a Proposal Introduction

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- Create a proposal
- Edit a proposal
- Give your SPO access to view and edit the proposal
  - Give your AOR access to view, edit and submit the proposal

If you are an SPO, you may take these actions:
- View and edit a proposal forwarded by a PI

If you are an Authorized Organizational Representative (AOR), you may take these actions:
- View, edit and submit the proposal forwarded by a PI

An AOR must sign the proposal in the process of submitting it to NSF. See Submit and Sign a Proposal Introduction for instructions.

Prepare a Proposal Functions

Proposal Functions Introduction

Print the contents of the Prepare a Proposal Functions book.

You have these options for working on proposals:
- Create a new proposal
- Edit a proposal
- Assign a PIN to a proposal
- Check a proposal for completeness
- Allow or Remove SPO access to a proposal
- Copy a submitted proposal

Proposal Functions Introduction

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You have these options for working on proposals:
- Create a new proposal
- Edit a proposal
- Assign a PIN to a proposal
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- Allow or Remove SPO access to a proposal
- Copy a submitted proposal

Create a New Proposal

1. On the **FastLane Home Page** screen, log in to Proposals, Awards, and Status as a PI (see PI/Co-PI Login). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management** screen displays (Figure 1).

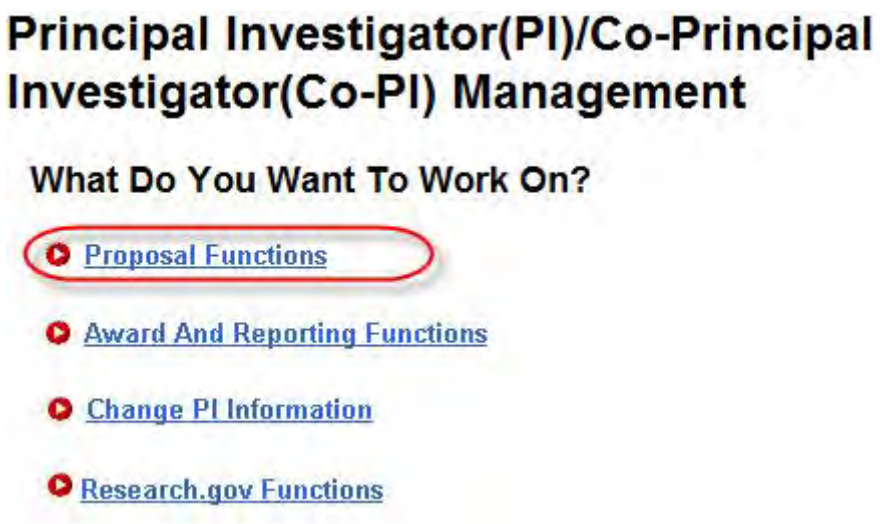


Figure 1 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management screen. The Proposal Functions link is circled.

2. Click **Proposal Functions** (Figure 1). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Proposal Functions** screen displays (Figure 2).

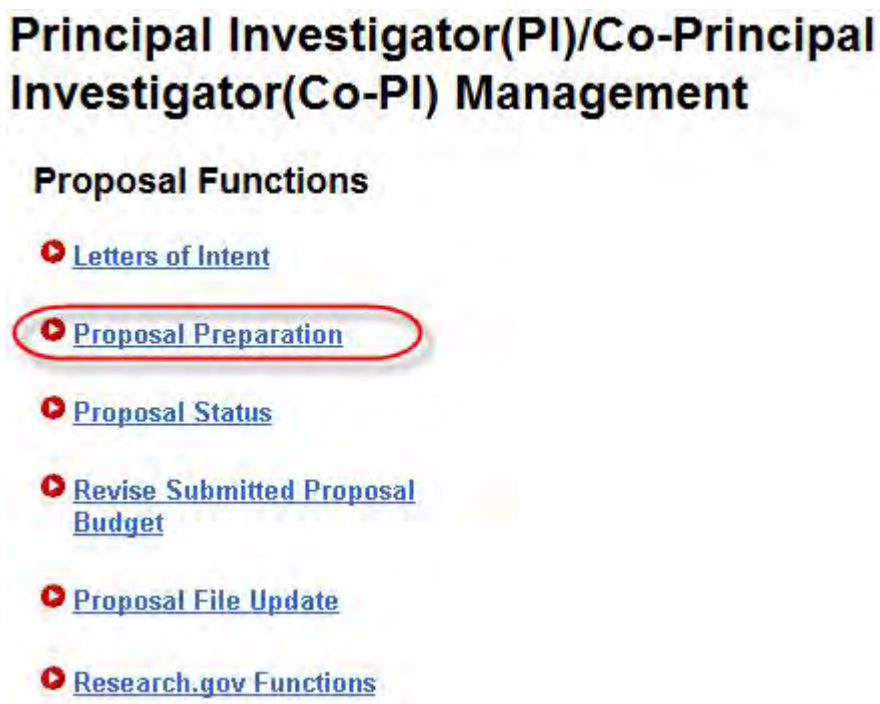


Figure 2 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Proposal Functions screen. The Proposal Preparation link is circled.

3. Click **Proposal Preparation** (Figure 2). The **Principal Investigator (PI) Information** screen displays (Figure 3).

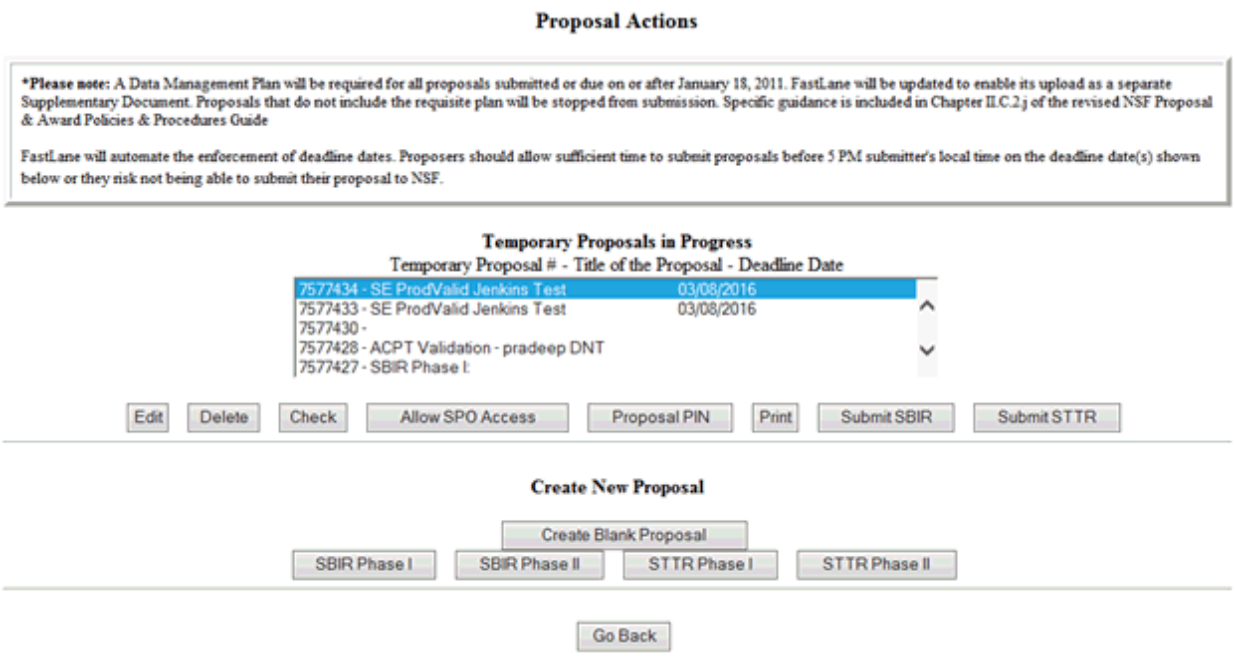


Figure 3 Principal Investigator (PI) Information screen. The Prepare Proposal button is circled.

4. Click either one of the **Prepare Proposal** buttons (Figure 3). The **Proposal Actions** screen displays (Figure 4).

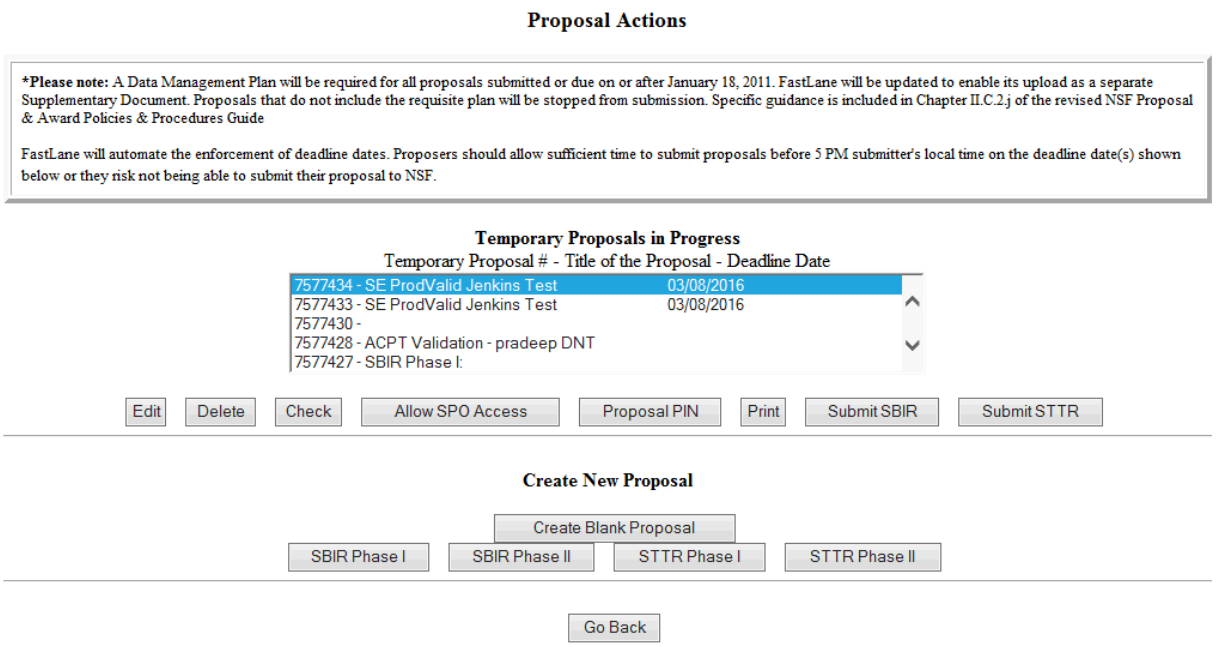
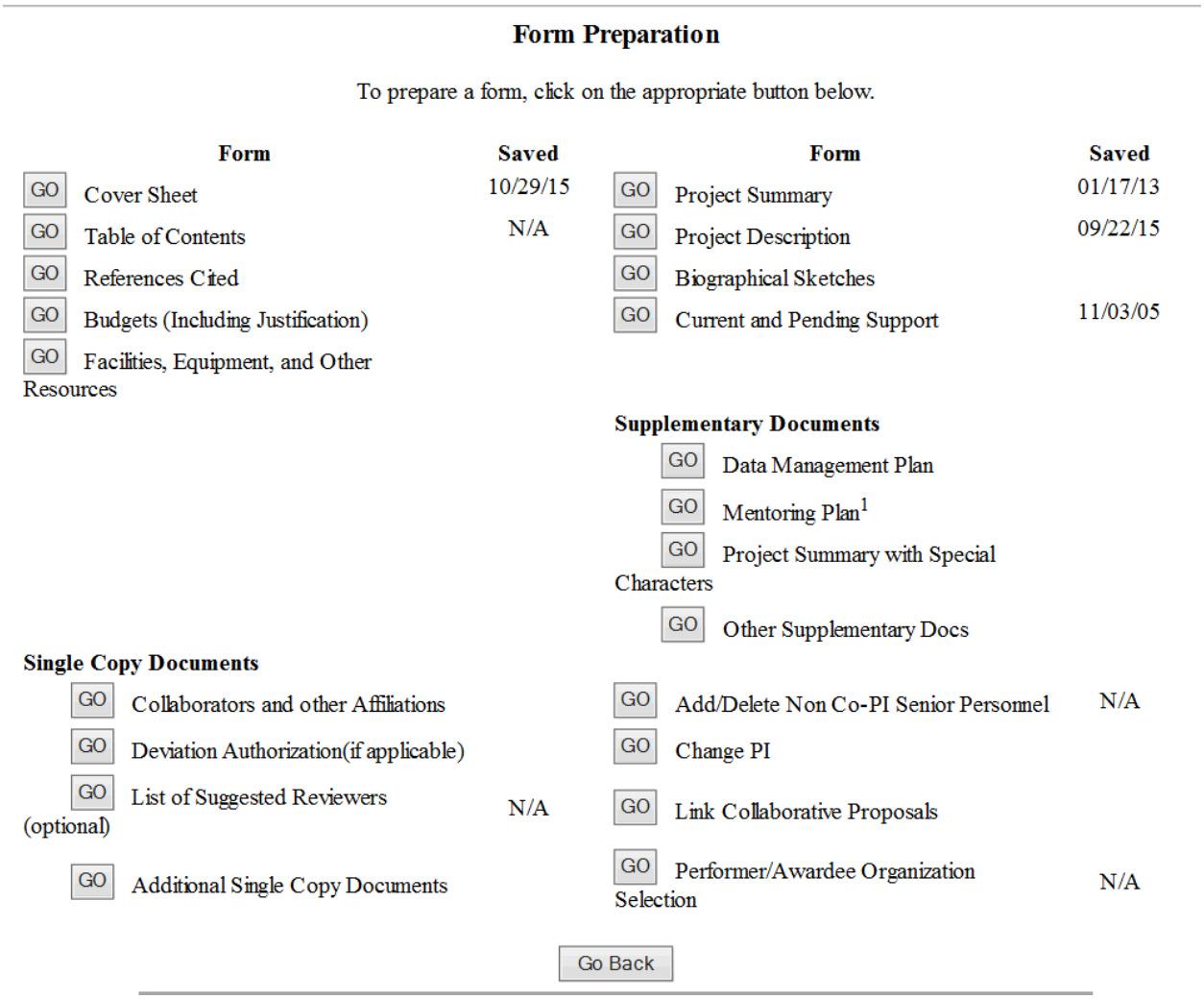


Figure 4 Proposal Actions screen. The Create Blank Proposal button is circled.

5. Click the **Create Blank Proposal** button (Figure 4). The **Form Preparation** screen displays (Figure 5). See Prepare Proposal Forms for instructions on how to work on all the proposal forms on the **Form Preparation** screen.



Form Preparation

To prepare a form, click on the appropriate button below.

Form	Saved	Form	Saved
GO Cover Sheet	10/29/15	GO Project Summary	01/17/13
GO Table of Contents	N/A	GO Project Description	09/22/15
GO References Cited		GO Biographical Sketches	
GO Budgets (Including Justification)		GO Current and Pending Support	11/03/05
GO Facilities, Equipment, and Other Resources			

Supplementary Documents

GO Data Management Plan

GO Mentoring Plan[1]

GO Project Summary with Special Characters

GO Other Supplementary Docs

Single Copy Documents

GO Collaborators and other Affiliations		GO Add/Delete Non Co-PI Senior Personnel	N/A
GO Deviation Authorization(if applicable)		GO Change PI	
GO List of Suggested Reviewers (optional)	N/A	GO Link Collaborative Proposals	
GO Additional Single Copy Documents		GO Performer/Awardee Organization Selection	N/A

Go Back

Figure 5 Form Preparation screen.

See also:

- Prepare proposal forms
- Edit a proposal
- Assign a PIN to a proposal
- Check a proposal for completeness
- Allow or Remove SPO access to a proposal
- Copy a submitted proposal

Edit a Proposal

1. On the **FastLane Home Page** screen, log in to Proposals, Awards, and Status as a PI (see PI/Co-PI Login). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management** screen displays (Figure 1).

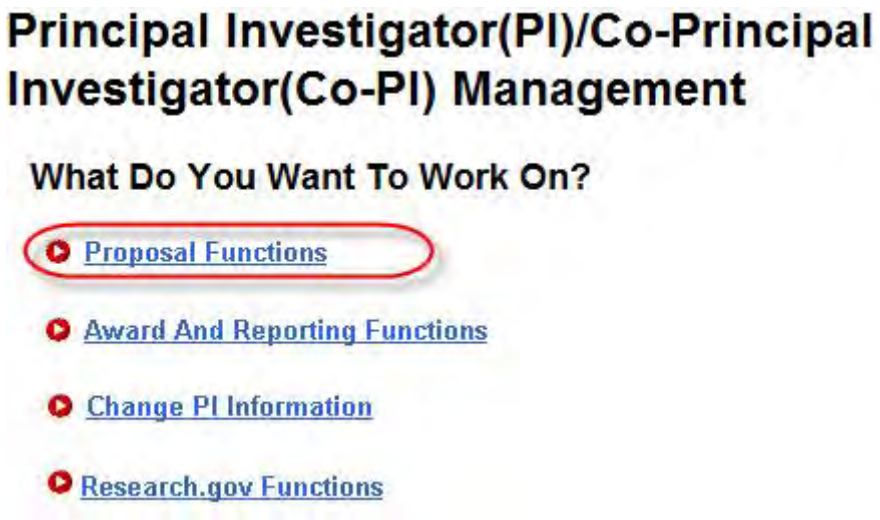


Figure 1 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management screen. The Proposal Functions link is circled.

2. Click **Proposal Functions** (Figure 1). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Proposal Functions** screen displays (Figure 2).

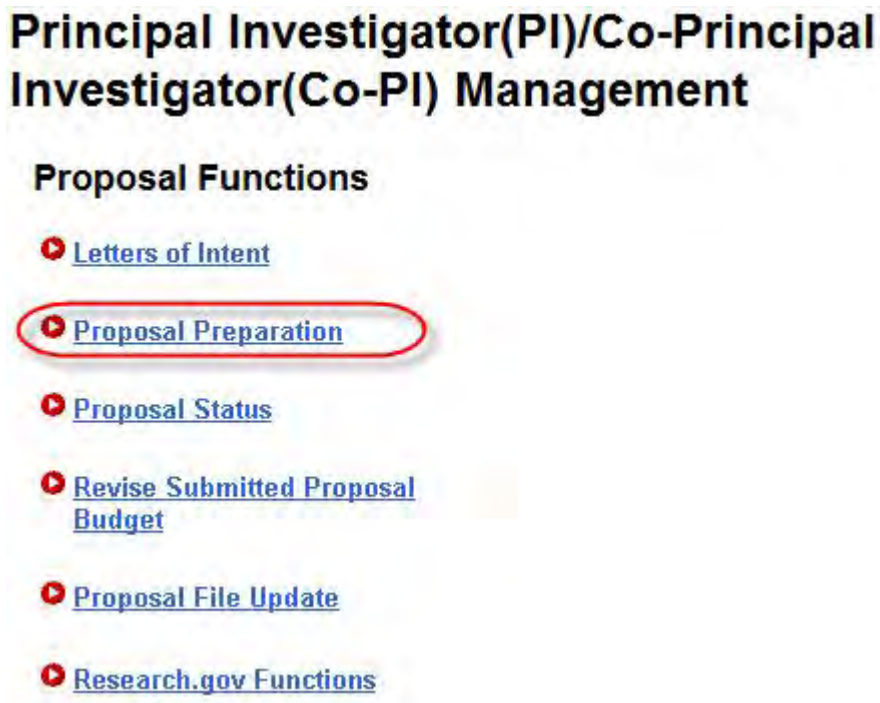


Figure 2 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Proposal Functions screen. The Proposal Preparation link is circled.

3. Click **Proposal Preparation** (Figure 2). The **Principal Investigator (PI) Information** screen displays (Figure 3).

Principal Investigator (PI) Information

Notice: Effective January 14, 2013, the National Science Foundation implemented revised merit review criteria based on the National Science Board (NSB) report, National Science Foundation's Merit Review Criteria: Review and Revisions. While the two merit review criteria remain unchanged (Intellectual Merit and Broader Impacts), guidance has been provided to clarify and improve the function of the criteria.

Revisions based on the NSB report have been incorporated into the Proposal & Award Policies & Procedures Guide (PAPPG), including the Project Summary Section (opens new window) and Project Description Section (opens new window). Now, if the Project Summary requirements are not met, the proposal will not be accepted by FastLane or will be returned without review. The PAPPG also states that the Project Description must now contain, as a separate section within the narrative, a discussion of the broader impacts of the proposed activities.

These requirements should be carefully considered by PIs when preparing proposals for submission to NSF.

Edit PI Information | Prepare Proposal | View Submitted

Go Back

Name	**Alan Alphaman**		
Organization	**National Science Foundation 4102852000**		
Department	**Information Systems**		
Address	**4201 Wilson BoulevardO.** **DIS ESB** **Arlington, VA 22230**	Phone Fax EMail	**(703) 292-7777** **(703) 292-9999** **gblock@nsf.gov**
Country	**US**		

Gender	**Male**		
Citizenship	**US citizen**	Degree Year	**2005**
Ethnicity	**Hispanic or Latino**	Degree	**MCE**
Disability Status		ORCID Identifier	
Race	**White**		

Serving or ever served on a Federally Funded Project as a PI or Co-PI. - **Yes**

Edit PI Information | Prepare Proposal | View Submitted

Go Back

Figure 3 Principal Investigator (PI) Information screen. The Prepare Proposal buttons are circled.

4. Click either one of the **Prepare Proposal** buttons (Figure 3). The **Proposal Actions** screen displays (Figure 4).

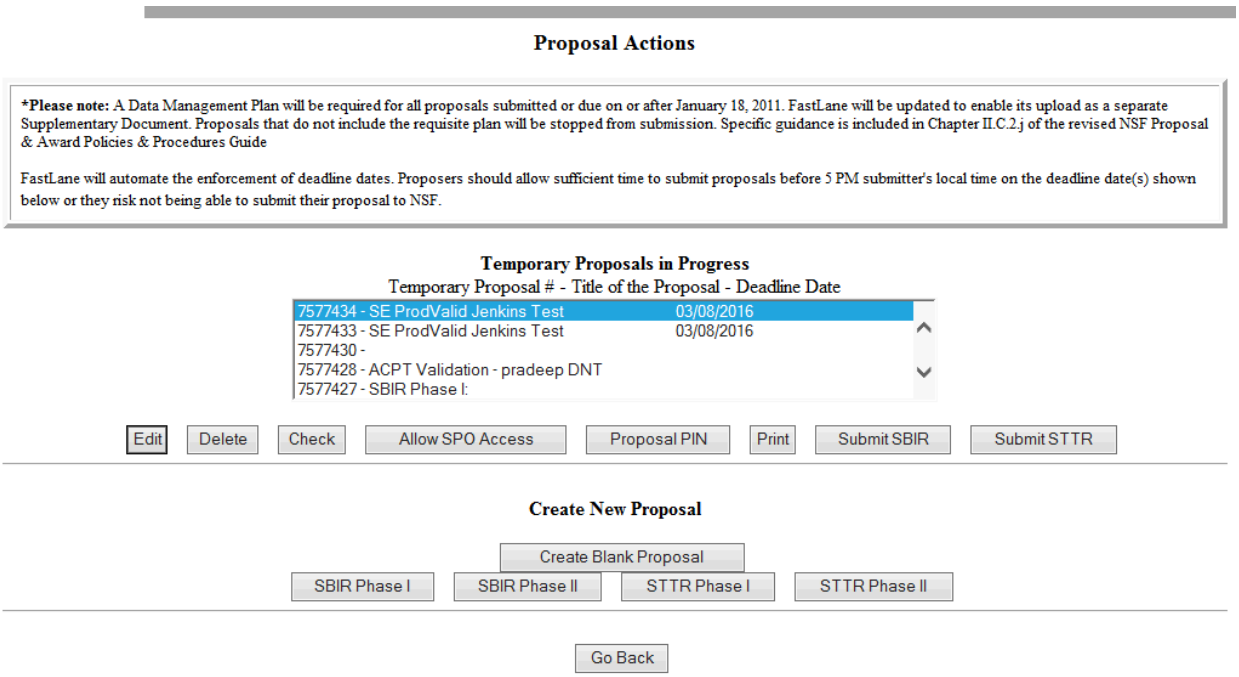
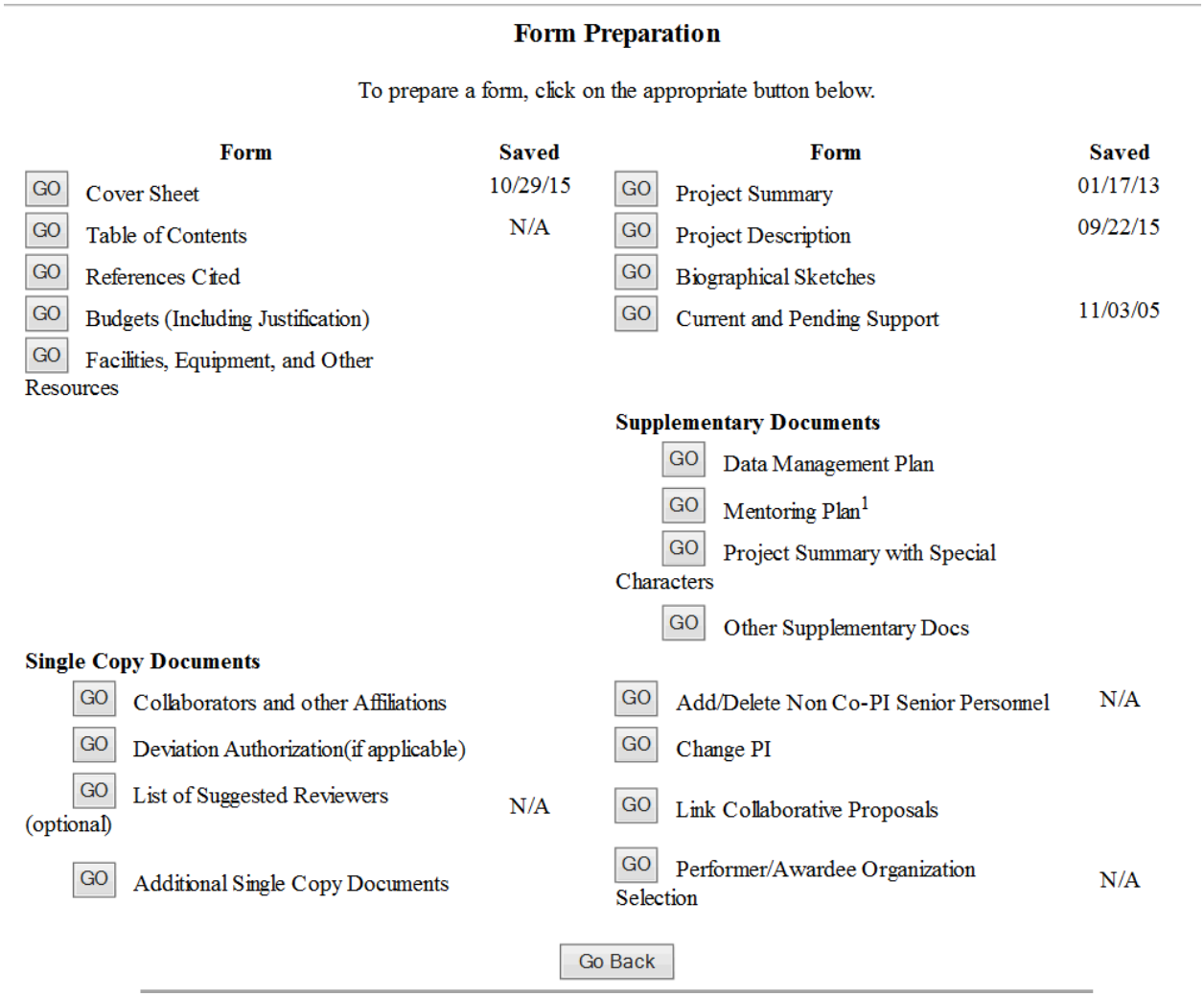


Figure 4 Proposal Actions screen. The Edit button is highlighted

5. Highlight the proposal you want to edit from the **Temporary Proposals in Progress** list (Figure 4).
6. Click the **Edit** button (Figure 4). The **Form Preparation** screen displays (Figure 5) for that proposal. See Prepare Proposal Forms for instructions on how to work on all the forms on the **Form Preparation** screen.



Form Preparation

To prepare a form, click on the appropriate button below.

Form	Saved	Form	Saved
GO Cover Sheet	10/29/15	GO Project Summary	01/17/13
GO Table of Contents	N/A	GO Project Description	09/22/15
GO References Cited		GO Biographical Sketches	
GO Budgets (Including Justification)		GO Current and Pending Support	11/03/05
GO Facilities, Equipment, and Other Resources			

Supplementary Documents

GO Data Management Plan

GO Mentoring Plan[1]

GO Project Summary with Special Characters

GO Other Supplementary Docs

Single Copy Documents

GO Collaborators and other Affiliations		GO Add/Delete Non Co-PI Senior Personnel	N/A
GO Deviation Authorization(if applicable)		GO Change PI	
GO List of Suggested Reviewers (optional)	N/A	GO Link Collaborative Proposals	
GO Additional Single Copy Documents		GO Performer/Awardee Organization Selection	N/A

Go Back

Figure 5 Form Preparation screen for the proposal you have selected to edit.

See also:

- Create a new proposal
- Assign a PIN to a proposal
- Check a proposal for completeness
- Allow or Remove SPO access to a proposal
- Copy a submitted proposal

Assign a PIN to a Proposal

You can assign a Personal Identification Number (PIN) to a proposal. An Other Authorized User (OAU), who is not a PI or Co-PI, needs a proposal's PIN to log in to Proposals, Awards, and Status and work on the proposal (see OAU Login).

1. Access the **Proposal Actions** screen (Figure 1) (see Steps 1 through 4 of Create a New Proposal, Edit a Proposal, or Create a New Proposal from a Template).

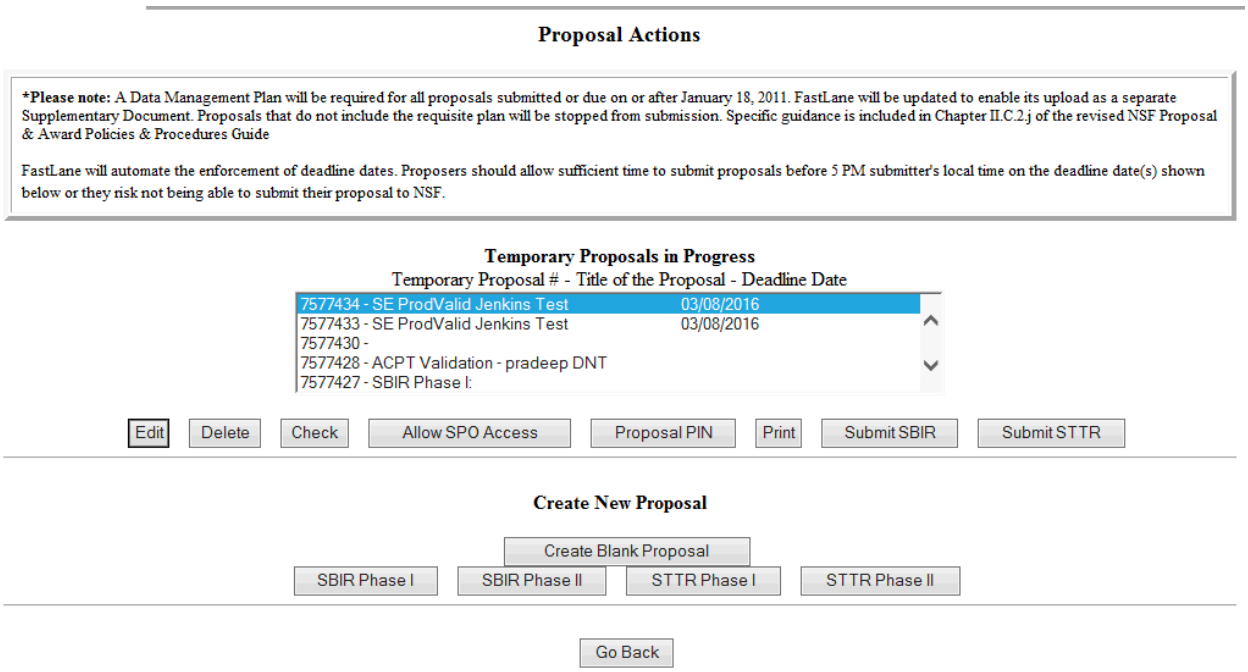


Figure 1 Proposal Actions screen. The Proposal PIN button is circled.

2. In the **Temporary Proposals in Progress** list (Figure 1), highlight the proposal that you want to assign a PIN to.
3. Click the **Proposal PIN** button (Figure 1). The **Proposal PIN Control** screen displays (Figure 2) for that proposal.

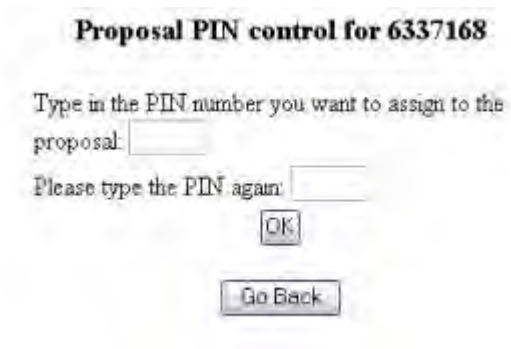


Figure 2 Proposal PIN Control screen.

4. Type the PIN in the boxes provided (Figure 2).
5. Click the **OK** button (Figure 2). The **PIN Changed for Proposal** screen displays (Figure 3).

Figure 3 PIN Changed for Proposal screen.

6. Click the **OK** button (Figure 3). The **Proposal Actions** screen displays (Figure 1).

See also:

- Create a new proposal
- Edit a proposal
- Check a proposal for completeness
- Allow or Remove SPO access to a proposal
- Copy a submitted proposal

Check a Proposal for Completeness

You can check the progress of a proposal's preparation through the **Check** function. This is especially helpful if a number of people—Co-PIs and Other Authorized Users—are working on the proposal.

The results tell you what documents are missing and which of those missing documents are required for NSF consideration of the proposal.

1. Access the **Proposal Actions** screen (Figure 1) (see Steps 1 through 4 of Create a New Proposal or of Edit a Proposal).

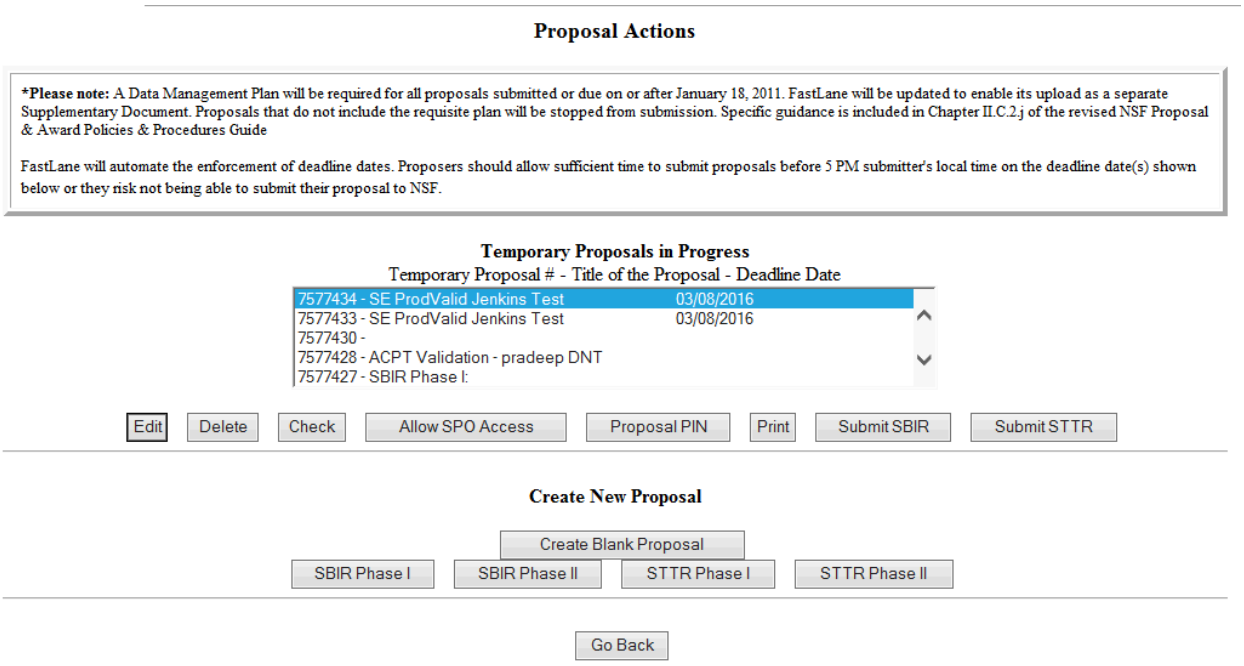
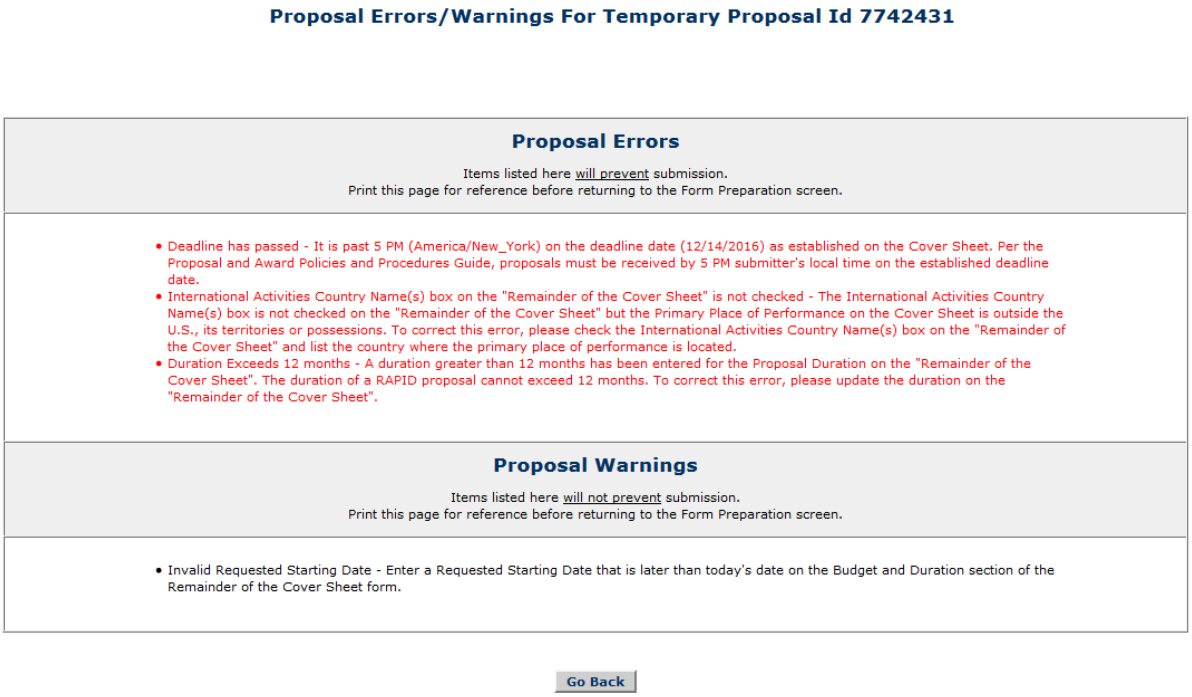


Figure 1 Proposal Actions screen. The Check button is circled.

2. Highlight the proposal that you want to check from the **Temporary Proposals in Progress** list (Figure 1).
3. Click the **Check** button (Figure 1).

4. The **Proposal Errors / Warnings** screen (Figure 2) is displayed with a list of proposal items that have not been completed.



Proposal Errors/Warnings For Temporary Proposal Id 7742431

Proposal Errors

Items listed here will prevent submission.
Print this page for reference before returning to the Form Preparation screen.

- Deadline has passed - It is past 5 PM (America/New_York) on the deadline date (12/14/2016) as established on the Cover Sheet. Per the Proposal and Award Policies and Procedures Guide, proposals must be received by 5 PM submitter's local time on the established deadline date.
- International Activities Country Name(s) box on the "Remainder of the Cover Sheet" is not checked - The International Activities Country Name(s) box is not checked on the "Remainder of the Cover Sheet" but the Primary Place of Performance on the Cover Sheet is outside the U.S., its territories or possessions. To correct this error, please check the International Activities Country Name(s) box on the "Remainder of the Cover Sheet" and list the country where the primary place of performance is located.
- Duration Exceeds 12 months - A duration greater than 12 months has been entered for the Proposal Duration on the "Remainder of the Cover Sheet". The duration of a RAPID proposal cannot exceed 12 months. To correct this error, please update the duration on the "Remainder of the Cover Sheet".

Proposal Warnings

Items listed here will not prevent submission.
Print this page for reference before returning to the Form Preparation screen.

- Invalid Requested Starting Date - Enter a Requested Starting Date that is later than today's date on the Budget and Duration section of the Remainder of the Cover Sheet form.

Go Back

Figure 2 Proposal Errors / Warnings screen.

See Also:
- Create a new proposal
- Edit a proposal
- Assign a PIN to a proposal
- Allow or Remove SPO access to a proposal
- Copy a submitted proposal

Allow or Remove SPO Access to Proposal

Allow or Remove Sponsored Project Office (SPO)/Authorized Organizational Representative (AOR) Access to a Proposal

1. Access the **Proposal Actions** screen (Figure 1) (see Steps 1 through 4 of Create a New Proposal or of Edit a Proposal).

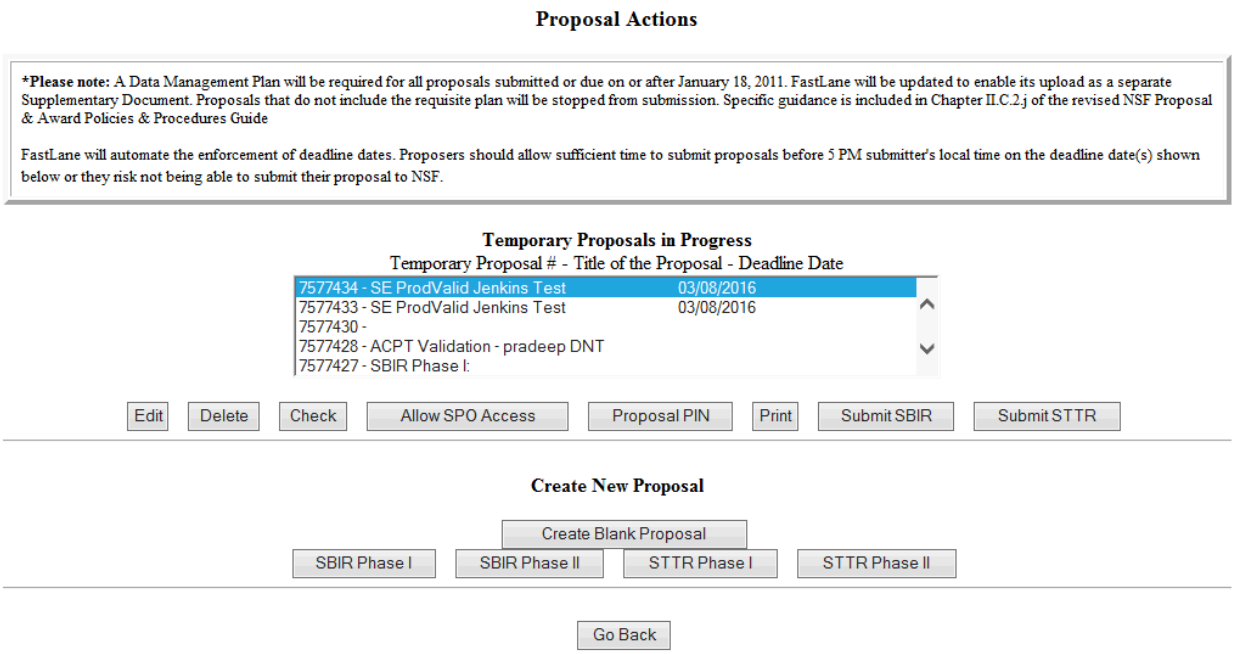


Figure 1 Proposal Actions screen. The Allow SPO Access button is circled.

2. Highlight the proposal you want to give the SPO access to in the **Temporary Proposals in Progress** list (Figure 1).
3. Click the **Allow SPO Access** button (Figure 1).
4. The **Proposal Errors/Warnings Screen** is displayed (Figure 2).
5. Click the **Proceed** button (Figure 2).

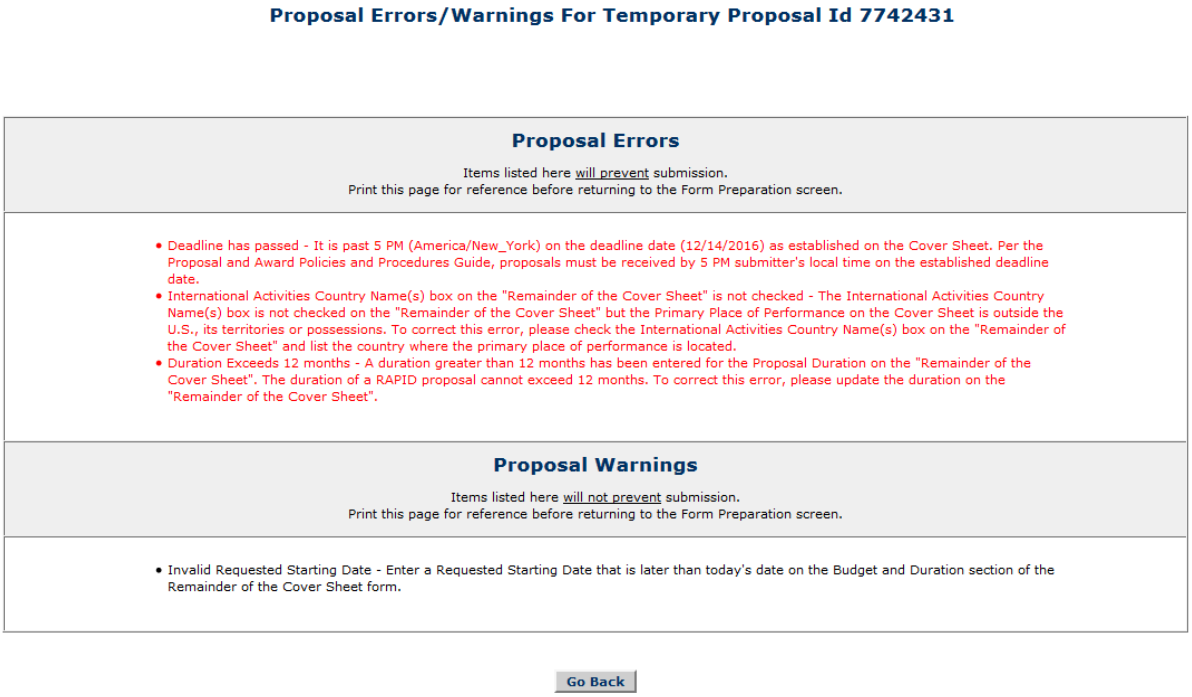


Figure 2 Proposal Errors / Warnings screen.

6. The **Sponsored Project Office (SPO) Access Control** screen displays (Figure 3) with these control options:
   - Allow SPO to view proposal
   - Allow SPO to view and edit the proposal
   - Allow AOR to view, edit, and submit proposal

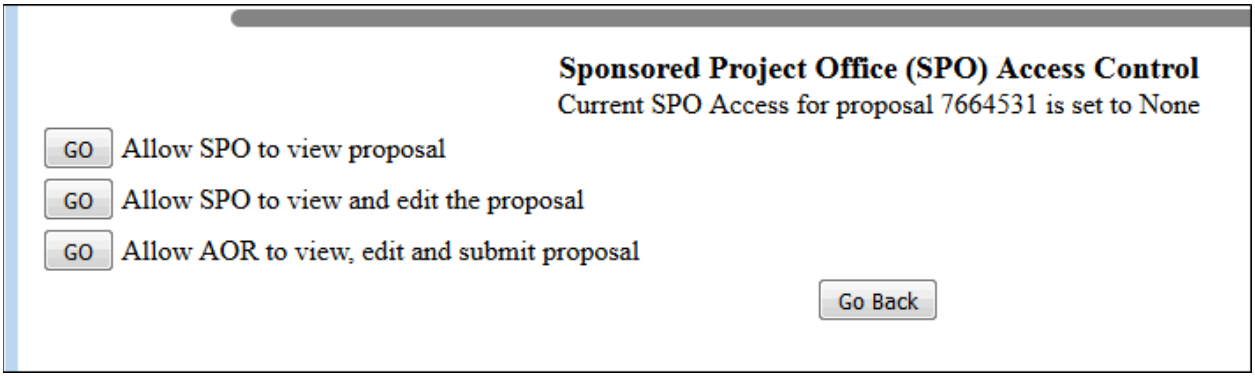


Figure 3 Sponsored Project Office (SPO) Access Control screen.

If the SPO already has access to a proposal, the **Sponsored Project Office (SPO) Access Control** screen displays as in Figure 4 with these options:

- Allow SPO to view the proposal
- Allow AOR to view, edit, and submit proposal
- Remove all SPO access to this proposal

Figure 4 Sponsored Projects Office (SPO) Access Control screen if the SPO already has access to the proposal.

See also:

- Create a new proposal
- Edit a proposal
- Assign a PIN to a proposal
- Check a proposal for completeness
- Copy a submitted proposal

Allow or Remove Sponsored Project Office (SPO) / Authorized Organizational Representative (AOR) Access to a Proposal

1. Access the **Proposal Actions** screen (Figure 1) (see Steps 1 through 4 of Create a New Proposal or of Edit a Proposal).

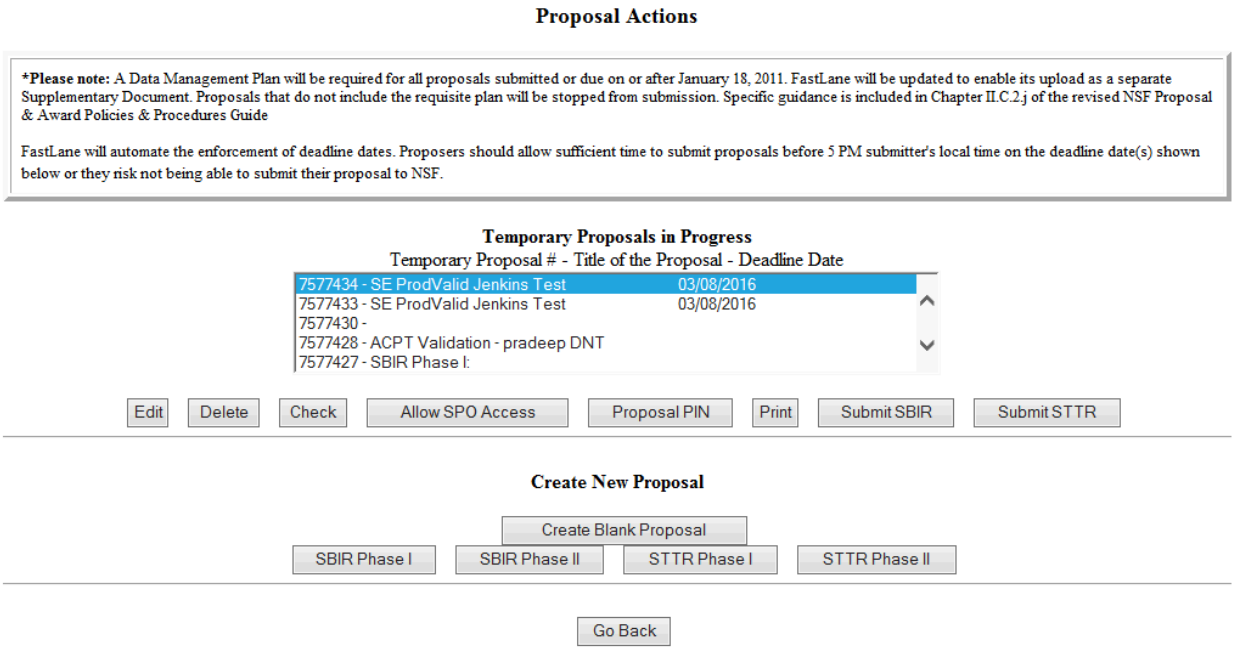
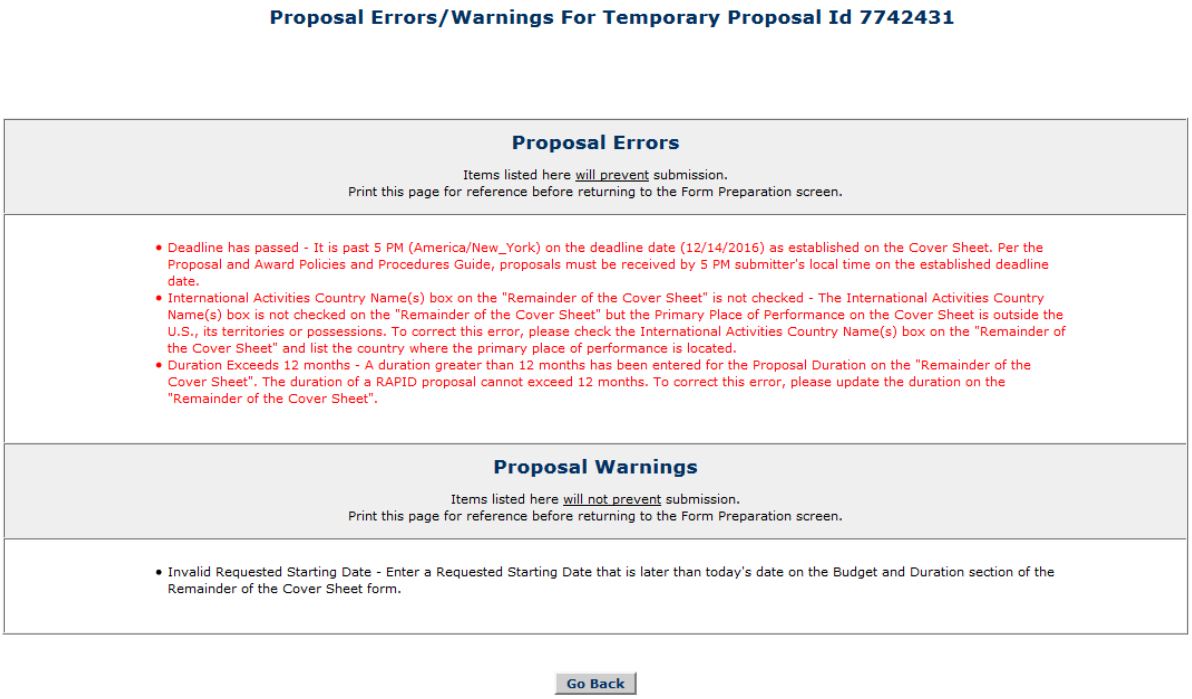


Figure 1 Proposal Actions screen. The Allow SPO Access button is circled.

2. Highlight the proposal you want to give the SPO access to in the **Temporary Proposals in Progress** list (Figure 1).
3. Click the **Allow SPO Access** button (Figure 1).
4. The **Proposal Errors / Warnings Screen** is displayed (Figure 2).
5. Click the **Proceed** button (Figure 2).



Proposal Errors/Warnings For Temporary Proposal Id 7742431

Proposal Errors

Items listed here will prevent submission.
Print this page for reference before returning to the Form Preparation screen.

- Deadline has passed - It is past 5 PM (America/New_York) on the deadline date (12/14/2016) as established on the Cover Sheet. Per the Proposal and Award Policies and Procedures Guide, proposals must be received by 5 PM submitter's local time on the established deadline date.
- International Activities Country Name(s) box on the "Remainder of the Cover Sheet" is not checked - The International Activities Country Name(s) box is not checked on the "Remainder of the Cover Sheet" but the Primary Place of Performance on the Cover Sheet is outside the U.S., its territories or possessions. To correct this error, please check the International Activities Country Name(s) box on the "Remainder of the Cover Sheet" and list the country where the primary place of performance is located.
- Duration Exceeds 12 months - A duration greater than 12 months has been entered for the Proposal Duration on the "Remainder of the Cover Sheet". The duration of a RAPID proposal cannot exceed 12 months. To correct this error, please update the duration on the "Remainder of the Cover Sheet".

Proposal Warnings

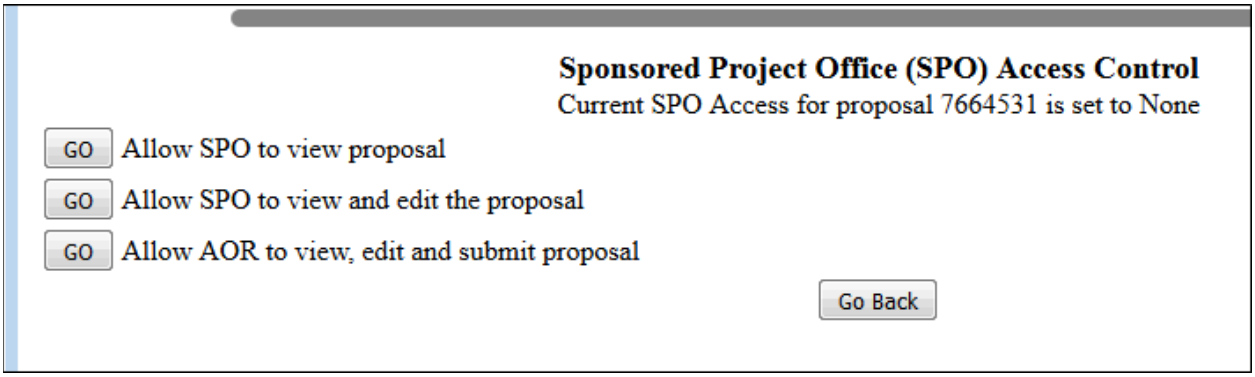
Items listed here will not prevent submission.
Print this page for reference before returning to the Form Preparation screen.

- Invalid Requested Starting Date - Enter a Requested Starting Date that is later than today's date on the Budget and Duration section of the Remainder of the Cover Sheet form.

Go Back

Figure 2 Proposal Errors/Warnings screen.

6. The **Sponsored Project Office (SPO) Access Control** screen displays (Figure 3) with these control options:
   - Allow SPO to view proposal
   - Allow SPO to view and edit the proposal
   - Allow AOR to view, edit, and submit proposal



Sponsored Project Office (SPO) Access Control
Current SPO Access for proposal 7664531 is set to None

GO Allow SPO to view proposal
GO Allow SPO to view and edit the proposal
GO Allow AOR to view, edit and submit proposal

Go Back

Figure 3 Sponsored Project Office (SPO) Access Control screen.

If the SPO already has access to a proposal, the **Sponsored Project Office (SPO) Access Control** screen displays as in Figure 4 with these options:

- Allow SPO to view the proposal
- Allow AOR to view, edit, and submit proposal
- Remove all SPO access to this proposal

Figure 4 Sponsored Projects Office (SPO) Access Control screen if the SPO already has access to the proposal.

See also:

- Create a new proposal
- Edit a proposal
- Assign a PIN to a proposal
- Check a proposal for completeness
- Copy a submitted proposal

Allow Sponsored Project Office (SPO) to Only View a Proposal

1. Access the **Sponsored Project Office (SPO) Access Control** screen (Figure 1) (see Allow or Remove SPO Access to a Proposal).

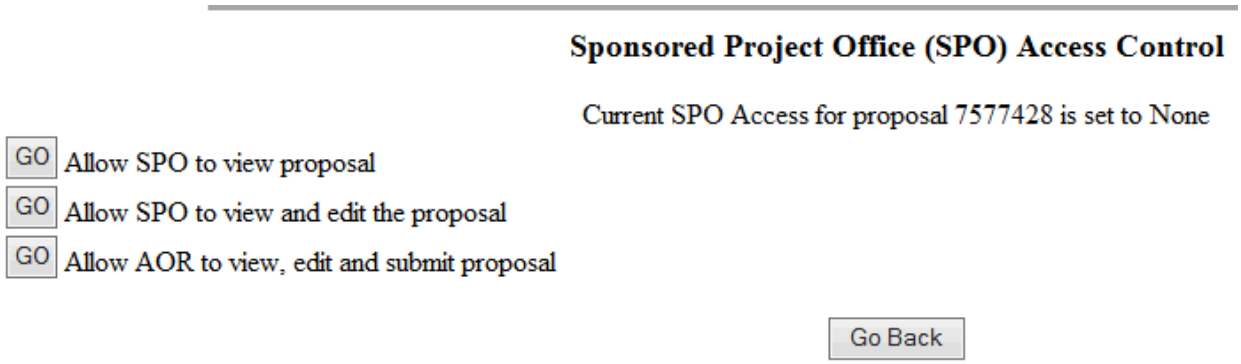


Figure 1 Sponsored Project Office (SPO) Access Control screen. The Go button for Allow SPO to Only View Proposal .

2. Click the **Go** button for Allow SPO to Only View Proposal (Figure 1). A screen displays (Figure 2) with a message that the SPO can now view but not edit or submit the proposal.

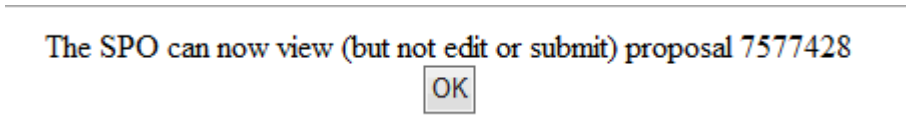


Figure 2 Screen with the message that the SPO can now view but not edit or submit the proposal.

3. Click the **OK** button (Figure 2). The **Proposal Actions** screen displays.

See also:
- Allow AOR to view, edit, and submit a proposal
- Allow SPO to view and edit the proposal
- Remove all SPO access to this proposal

Allow Sponsored Project Office (SPO) to View and Edit the Proposal

1. Access the **Sponsored Project Office (SPO) Access Control** screen (Figure 1) (see Allow or Remove SPO Access to a Proposal).

Figure 1 Sponsored Research Office (SPO) Access Control screen with the Go button for Allow SPO to View and Edit Proposal

2. Click the **Go** button for Allow SPO to View and Edit But Not Submit Proposal (Figure 1). A screen displays (Figure 2) with a message that the SPO can now view and edit but not submit the proposal.

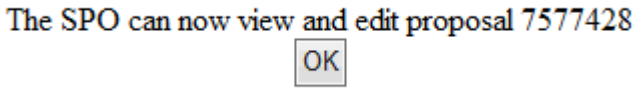


Figure 2 Screen with the message that the SPO can now view and edit proposal.

3. Click the **OK** button (Figure 2). The **Proposal Actions** screen displays.

Allow Authorized Organizational Representative (AOR) to View, Edit, and Submit a Proposal

1. Access the **Sponsored Project Office (SPO) Access Control** screen (Figure 1) (see Allow or Remove SPO Access to a Proposal).

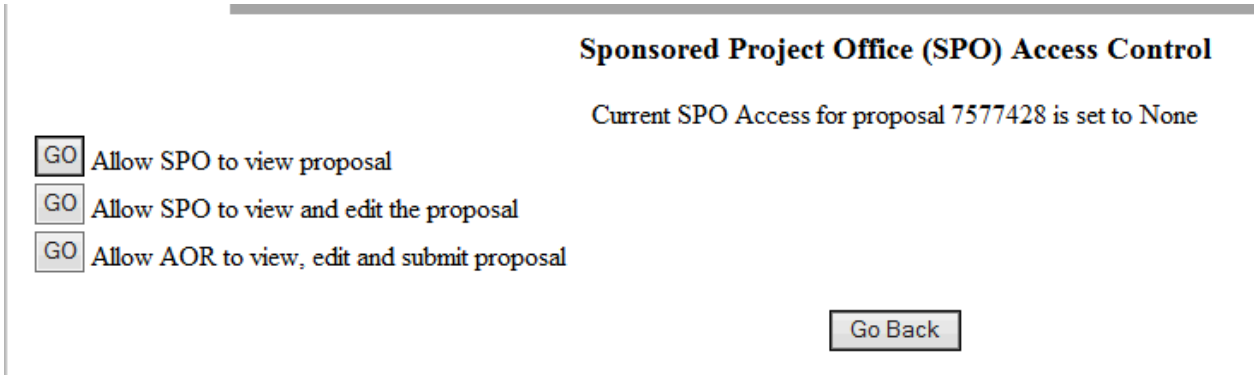


Figure 1 Sponsored Project Office (SPO) Access Control screen. The Go button for Allow SPO to View, Edit, and Submit Proposal is circled.

2. Click the **Go** button for Allow AOR to View, Edit, and Submit Proposal (Figure 1). A screen displays (Figure 2) with a message that the AOR now has full access to the proposal and with a list of the individuals who will receive emails from FastLane on the proposal's new access status.

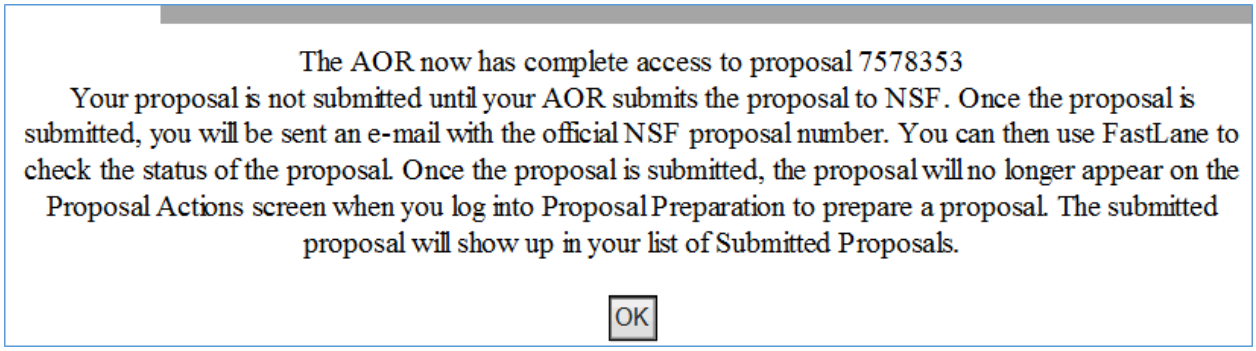


Figure 2 Screen with the message that the SPO now has full access to the proposal and with the list of people the NSF will notify of the SPO's access.

3. Click the **OK** button (Figure 2). The **Proposal Actions** screen displays.

See also:

- Allow SPO to only view proposal but not submit
- Allow SPO to view and edit the proposal
- Remove all SPO access to this proposal

Remove Sponsored Project Office (SPO) Access to a Proposal

1. Access the **Sponsored Project Office (SPO) Access Control** screen (Figure 1) (see Allow or Remove SPO Access to a Proposal).

Figure 1 Sponsored Project Office (SPO) Access Control screen. The Go button for Remove All SPO Access to This Proposal is circled.

2. On the **Sponsored Research Office (SPO) Access Control** screen (Figure 1), click the **Go** button for Remove All SPO Access to This Proposal. A screen displays (Figure 2) with the message that SPO access to the proposal is blocked.

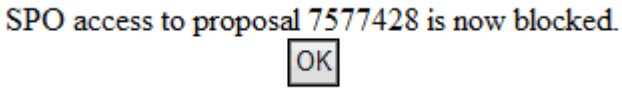


Figure 2 Screen with the message that SPO access to the proposal is blocked.

3. Click the **OK** button (Figure 2). The **Proposal Actions** screen displays.

See also:

- Allow SPO to only view proposal but not submit
- Allow SPO to view and edit the proposal
- Allow AOR to view, edit, and submit proposal

Copy a Submitted Proposal

1. On the **FastLane Home Page** screen, log in to Proposals, Awards and Status as a PI (see PI/Co-PI Login. The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management** screen displays (Figure 1).

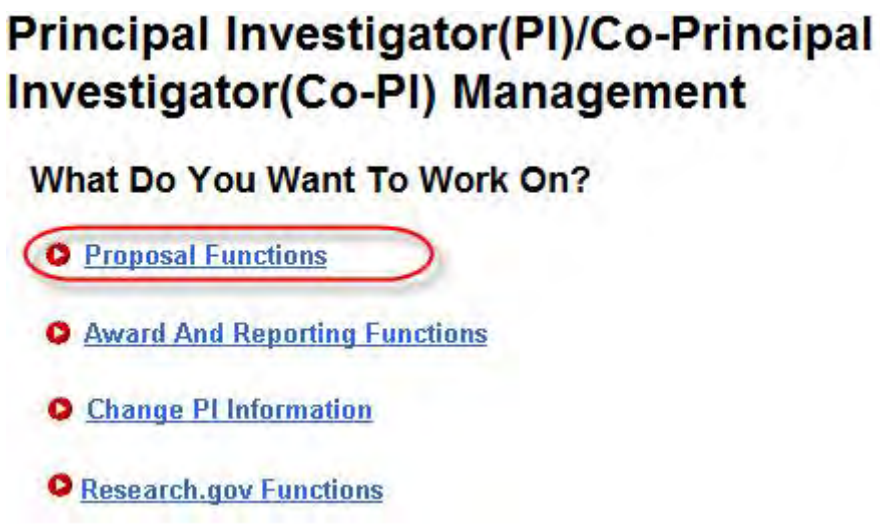


Figure 1 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management screen. The Proposal Functions link is circled.

2. Click **Proposal Functions** (Figure 1). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Proposal Functions** screen displays (Figure 2).

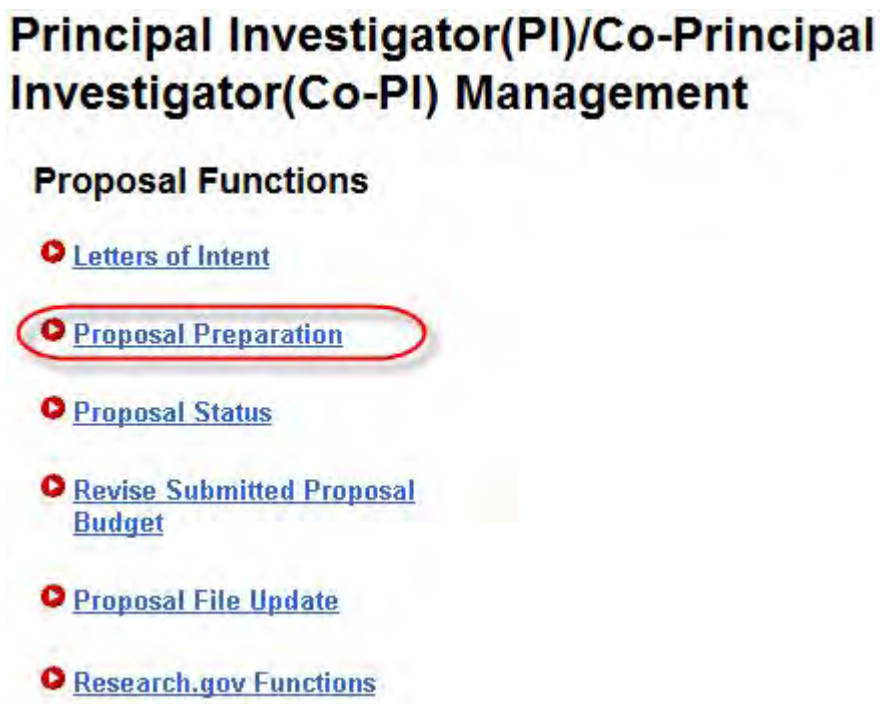


Figure 2 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Proposal Functions screen. The Proposal Preparation link is circled.

3. Click **Proposal Preparation** (Figure 2). The **Principal Investigator (PI) Information** screen displays (Figure 3).

Figure 3 Principal Investigator (PI) Information screen. The View Submitted buttons are circled.

4. Click either of the **View Submitted** buttons (Figure 3). The **Submitted Proposals** screen displays (Figure 4).

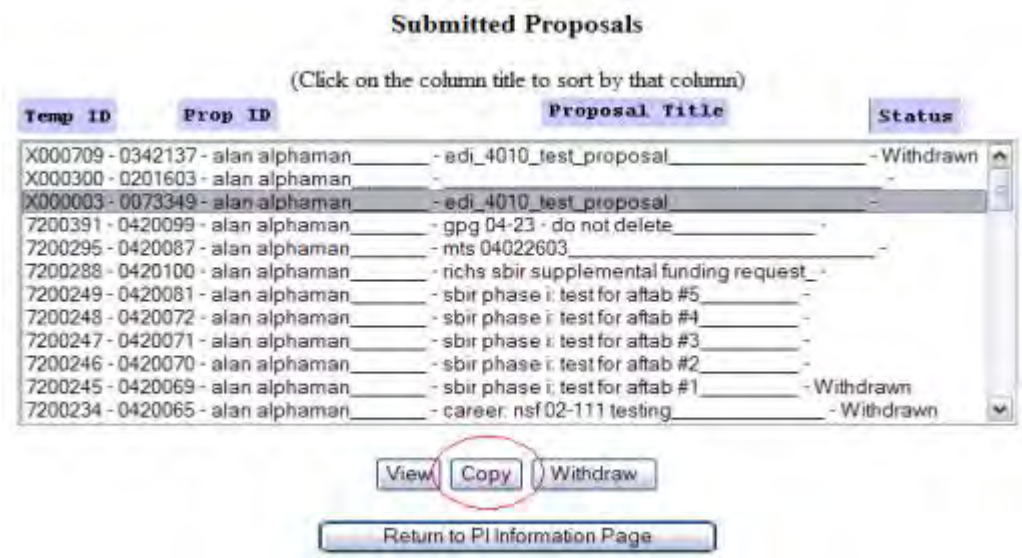


Figure 4 Submitted Proposals screen. The Copy button is circled.

5. Highlight the proposal you want to copy from the **Submitted Proposals** list (Figure 4).
6. Click the **Copy** button (Figure 4). If the proposal that is selected was submitted to the current GPG version, the screen displays (Figure 5) a message that the proposal you selected is now copied to a new work in progress with a Temporary Proposal Number. If the proposal was submitted to an older GPG version, screen displays (Figure 5.1) a message that the proposal that you selected cannot be copied as it does not belong to current the GPG. A new Proposal can be created via the "Prepare Proposal" process.

Figure 5 Screen with the message that the proposal is copied as a new proposal in progress with a Temporary Proposal Number. The OK button is circled.

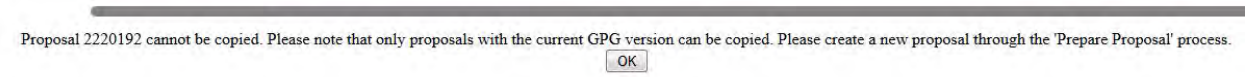


Figure 5.1 Screen with message that proposal cannot be copied as selected proposal does not belong to current GPG.

7. Click the **OK** button (Figure 5 or 5.1). The **Submitted Proposals** screen displays (Figure 6).

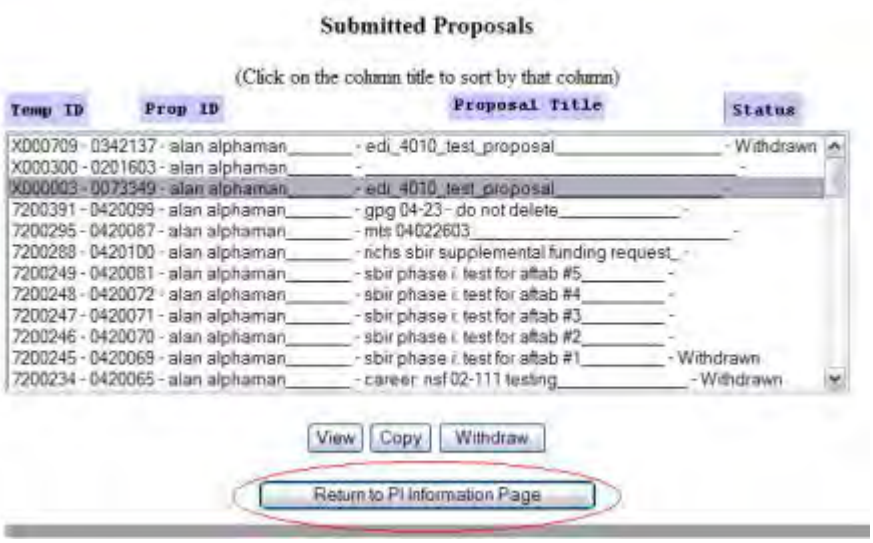


Figure 6 Submitted Proposals screen. The Return to PI Information Page button is circled.

8. To edit the copied proposal, click the **Return to PI Information Page** button (Figure 6). The **Principal Investigator (PI) Information** screen displays (Figure 7).

Principal Investigator (PI) Information

Notice: Effective January 14, 2013, the National Science Foundation implemented revised merit review criteria based on the National Science Board (NSB) report, National Science Foundation's Merit Review Criteria: Review and Revisions. While the two merit review criteria remain unchanged (Intellectual Merit and Broader Impacts), guidance has been provided to clarify and improve the function of the criteria.

Revisions based on the NSB report have been incorporated into the Proposal & Award Policies & Procedures Guide (PAPPG), including the Project Summary Section (opens new window) and Project Description Section (opens new window). Now, if the Project Summary requirements are not met, the proposal will not be accepted by FastLane or will be returned without review. The PAPPG also states that the Project Description must now contain, as a separate section within the narrative, a discussion of the broader impacts of the proposed activities.

These requirements should be carefully considered by PIs when preparing proposals for submission to NSF.

Edit PI Information | Prepare Proposal | View Submitted

Go Back

Name	**Alan Alphaman**		
Organization	**National Science Foundation 4102852000**		
Department	**Information Systems**		
Address	**4201 Wilson BoulevardO.** **DIS ESB** **Arlington, VA 22230**	Phone Fax EMail	**(703) 292-7777** **(703) 292-9999** **gblock@nsf.gov**
Country	**US**		

Gender	**Male**		
Citizenship	**US citizen**	Degree Year	**2005**
Ethnicity	**Hispanic or Latino**	Degree	**MCE**
Disability Status		ORCID Identifier	
Race	**White**		

Serving or ever served on a Federally Funded Project as a PI or Co-PI. - **Yes**

Edit PI Information | Prepare Proposal | View Submitted

Figure 7 Principal Investigator (PI) Information screen. The Prepare Proposal buttons are circled.

9. Click one of the **Prepare Proposal** buttons (Figure 7). The **Proposal Actions** screen displays (Figure 8).

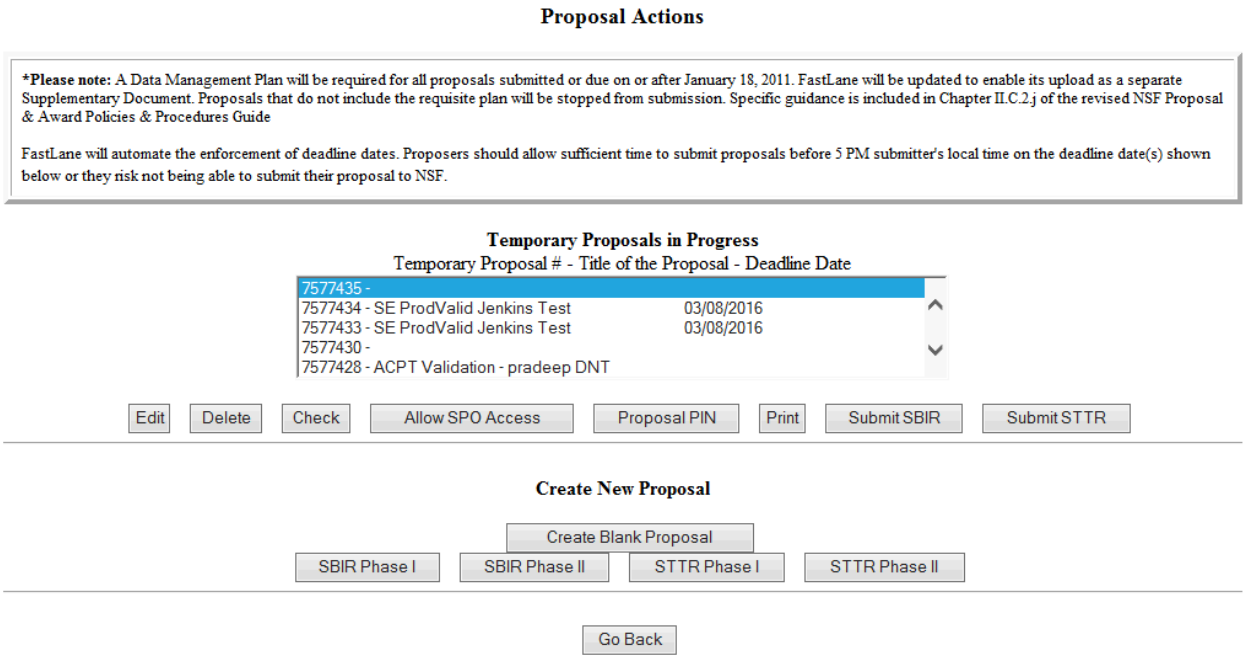


Figure 8 Proposal Actions screen with the newly copied proposal highlighted. The Edit button is circled.

10. Highlight the copied proposal in the **Temporary Proposals in Progress** list (Figure 8).
11. Click the **Edit** button (Figure 8). The **Form Preparation** screen displays (Figure 9) for the copied proposal. See Prepare Proposal Forms for instructions on how to work on all the forms in the **Form Preparation** screen.

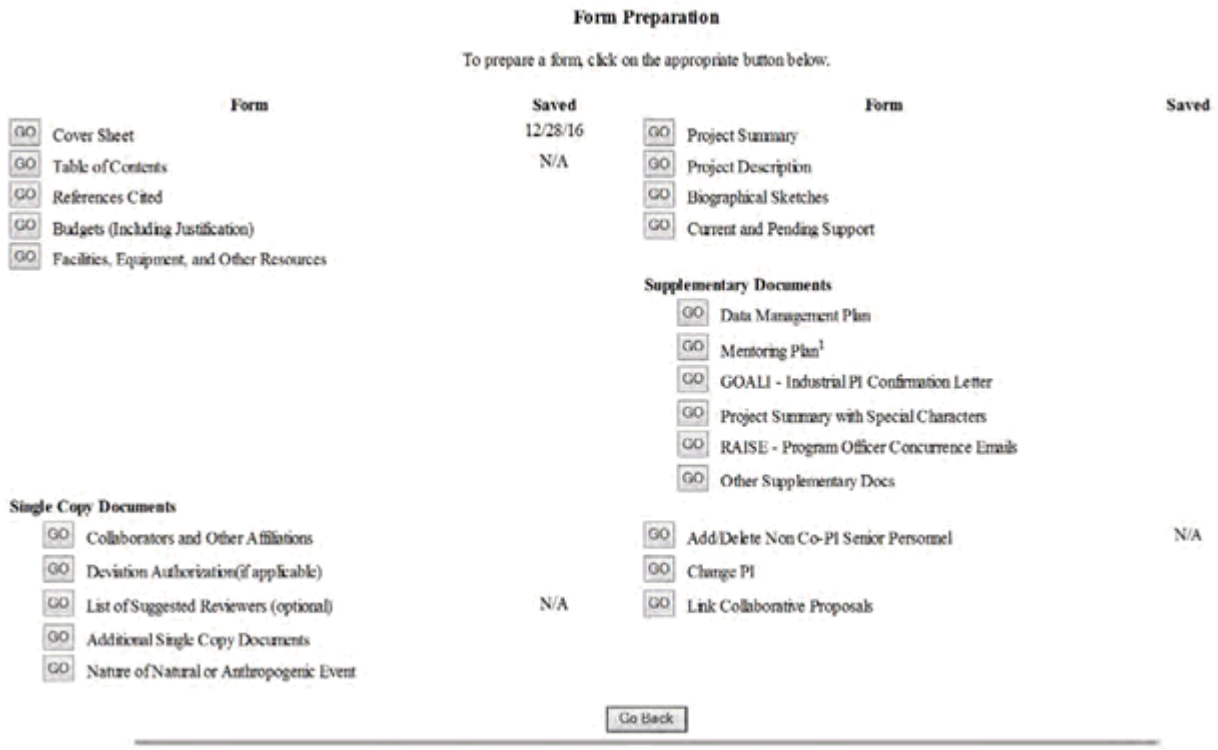


Figure 9 Form Preparation screen for the copied proposal.

See also:

- Create a new proposal
- Edit a proposal
- Assign a PIN to a proposal
- Check a proposal for completeness
- Allow or Remove SPO access to a proposal

Proposal Forms

Prepare Proposal Forms

Print the contents of the Proposal Forms book.

To complete the necessary information for a proposal, access the **Form Preparation** screen (Figure 1) (see Create a New Proposal, Edit a Proposal). The **Form Preparation** screen lists all the proposal formats (click on a link below to see instructions):

- Cover Sheet
- Table of Contents
- References Cited
- Budgets (Including Justification)
- Facilities, Equipment, and Other Resources
- Deviation Authorization
- List of Suggested Reviewers
- Additional Single Copy Documents

- Project Summary
- Project Description
- Biographical Sketches
- Current and Pending Support
- Supplementary Docs
- Add/Delete Non-Co-PI Senior Personnel
- Change PI
- Link Collaborative Proposals
- Proposal Classification Form

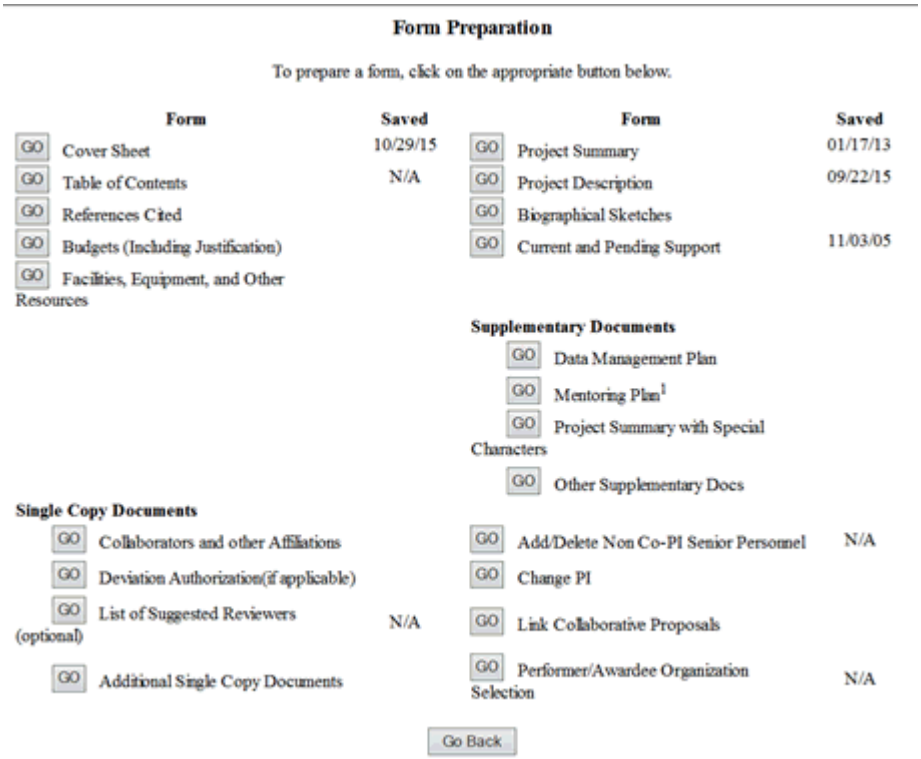


Figure 1 Form Preparation screen.

Prepare Proposal Forms

Print the contents of the Proposal Forms book.

To complete the necessary information for a proposal, access the **Form Preparation** screen (Figure 1) (see Create a New Proposal, Edit a Proposal). The **Form Preparation** screen lists all the proposal formats (click on a link below to see instructions):

- Cover Sheet
- Table of Contents
- References Cited
- Budgets (Including Justification)
- Facilities, Equipment, and Other Resources
- Deviation Authorization
- List of Suggested Reviewers

- Additional Single Copy Documents
- Project Summary
- Project Description
- Biographical Sketches
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- Add/Delete Non-Co-PI Senior Personnel
- Change PI
- Link Collaborative Proposals
- Proposal Classification Form

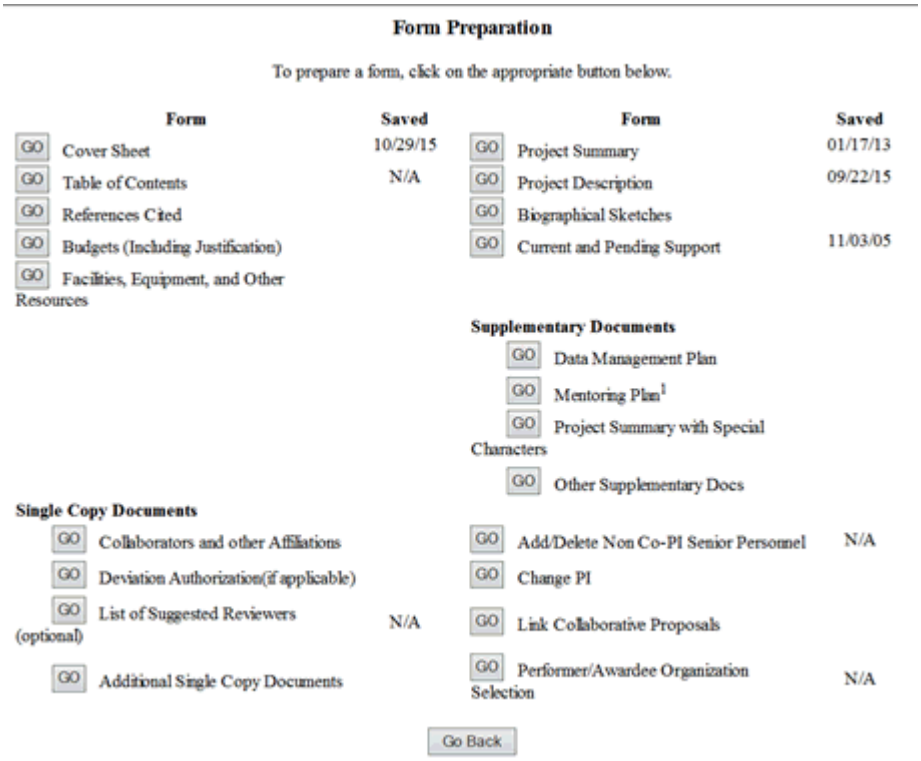

Figure 1 Form Preparation screen.

Cover Sheet

What Is the Cover Sheet?

There are four major components to the proposal Cover Sheet, and you must complete them in the order that they appear in the **Cover Sheet Components Form** screen, as follows:

1. Awardee & Project/Performance Site Primary Location
2. Program Description/Announcement/Solicitation/ No.
3. NSF Unit of Consideration
4. Remainder of the Cover Sheet

You may want to print the Cover Sheet to gain a quick overview of its components.

See also:
- Table of Contents
- References Cited
- Budgets (Including Justification)
- Facilities, Equipment, and Other Resources
- Deviation Authorization
- List of Suggested Reviewers
- Additional Single Copy Documents
- Project Summary
- Project Description
- Biographical Sketches
- Current and Pending Support
- Supplementary Docs
- Add/Delete Non-Co-PI Senior Personnel
- Change PI
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- Proposal Classification Form

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See also:
- Table of Contents
- References Cited
- Budgets (Including Justification)
- Facilities, Equipment, and Other Resources
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- List of Suggested Reviewers
- Additional Single Copy Documents
- Project Summary
- Project Description
- Biographical Sketches
- Current and Pending Support
- Supplementary Docs
- Add/Delete Non-Co-PI Senior Personnel
- Change PI
- Link Collaborative Proposals
- Proposal Classification Form

Access and Print the Cover Sheet

1. Access the **Form Preparation** screen (Figure 1) (see Create a New Proposal,or Edit a Proposal).

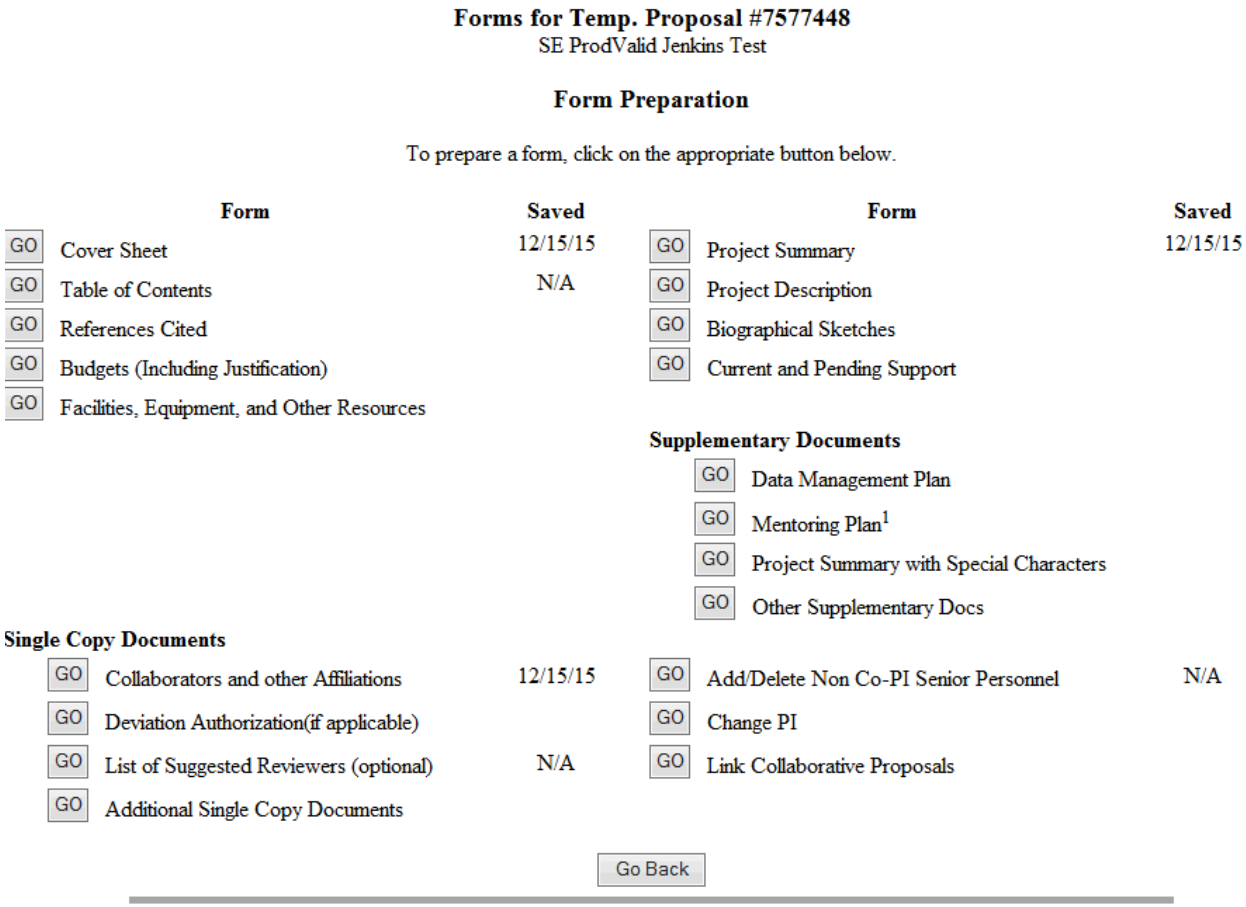


Figure 1 Form Preparation screen.

2. Click the **Go** button for Cover Sheet (Figure 1). The **Cover Sheet Components Form** screen displays (Figure 2).

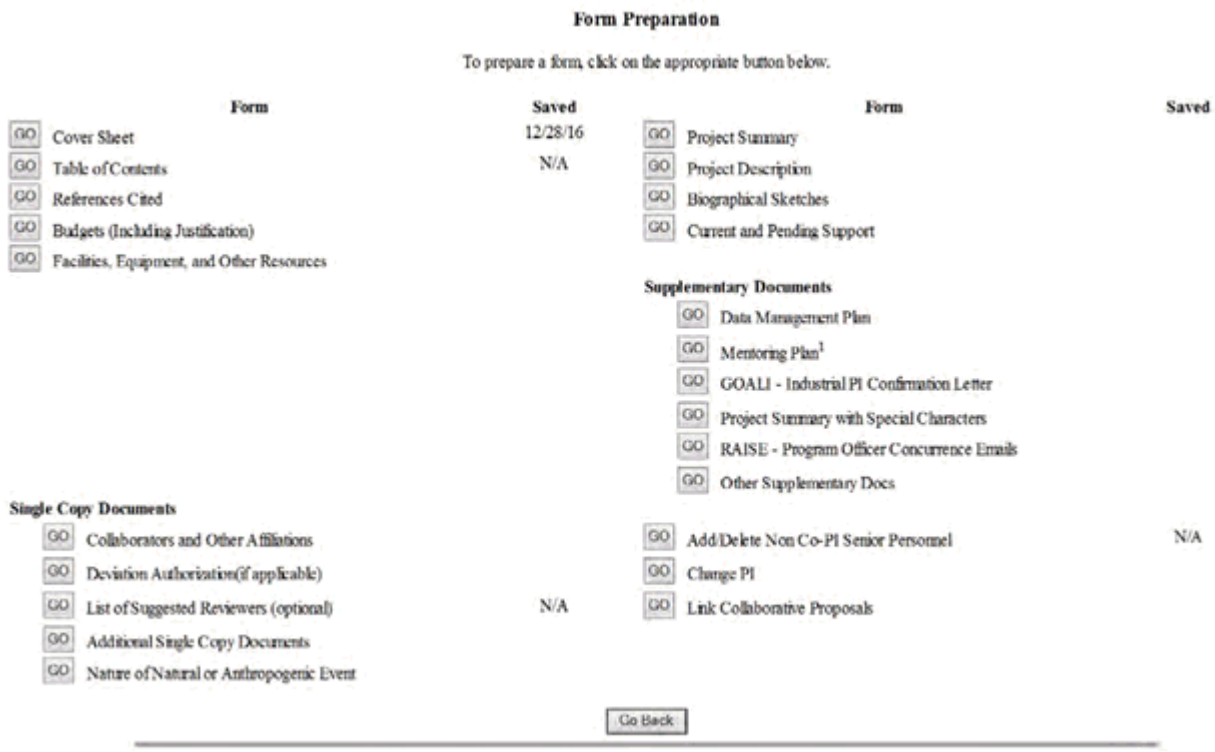


Figure 2 Cover Sheet Components Form screen. The Print link is circled.

3. Click **Print** in the right navigation bar (Figure 2). The **Print Menu** screen (Figure 3) displays.

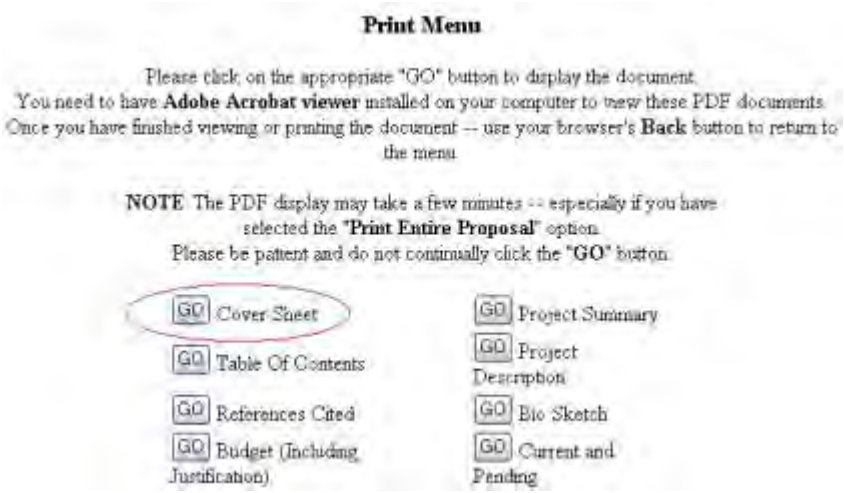
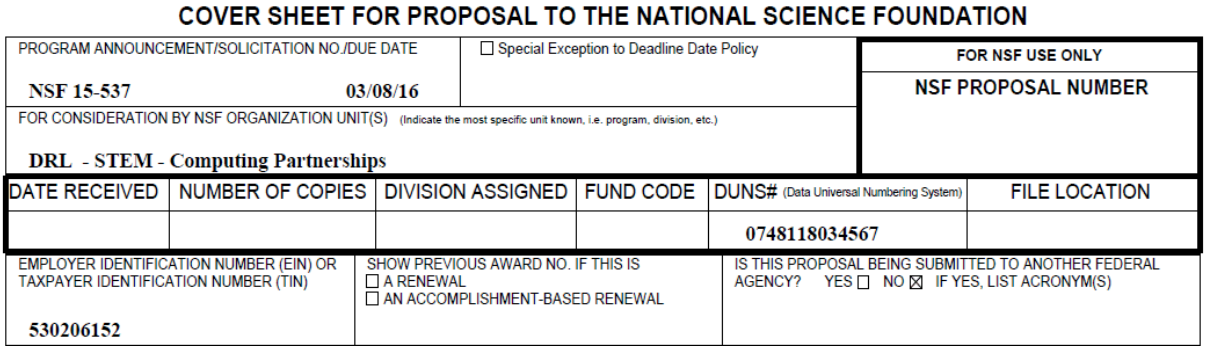


Figure 3 Print Menu screen. The Go button for Cover Sheet is circled.

4. Click the **Go** button for Cover Sheet (Figure 3). The Cover Sheet displays (Figure 4) in PDF format. If you need to download Adobe Reader, see Adobe Reader for FastLane.



COVER SHEET FOR PROPOSAL TO THE NATIONAL SCIENCE FOUNDATION

PROGRAM ANNOUNCEMENT/SOLICITATION NO./DUE DATE	☐ Special Exception to Deadline Date Policy	FOR NSF USE ONLY
NSF 15-537 03/08/16		NSF PROPOSAL NUMBER
FOR CONSIDERATION BY NSF ORGANIZATION UNIT(S) (Indicate the most specific unit known, i.e. program, division, etc.)		
DRL - STEM - Computing Partnerships		

DATE RECEIVED	NUMBER OF COPIES	DIVISION ASSIGNED	FUND CODE	DUNS# (Data Universal Numbering System)	FILE LOCATION
				0748118034567	

EMPLOYER IDENTIFICATION NUMBER (EIN) OR TAXPAYER IDENTIFICATION NUMBER (TIN)	SHOW PREVIOUS AWARD NO. IF THIS IS ☐ A RENEWAL ☐ AN ACCOMPLISHMENT-BASED RENEWAL	IS THIS PROPOSAL BEING SUBMITTED TO ANOTHER FEDERAL AGENCY? YES ☐ NO ☒ IF YES, LIST ACRONYM(S)
530206152		

Figure 4 Cover Sheet in PDF format. The Print icon is circled.

5. Click the **Print** icon in the toolbar of the PDF Cover Sheet (Figure 4). The Cover Sheet prints.
6. Click the back button on the browser. The **Print Menu** screen displays (Figure 3).

Awardee & Project/Performance Site Primary Location

Awardee & Project/Performance Site Primary Location Seclection

You may change both the Awardee Organization and Project/Performance Site Primary Location as necessary.

1. Access the **Cover Sheet Components Form** screen (Figure 1) (see Access and Print the Cover Sheet, Steps 1 and 2).

Cover Sheet Components Form

The NSF Cover Sheet within FastLane has been divided into 3 sections:

- Program Announcement / Solicitation Number Selection
- NSF Unit Consideration
- Remainder of Cover Sheet

To complete a section, click on the Go button, and click on OK to save the data.

GO Awardee Organization/Primary Place Of Performance Selection

Awardee Organization	Primary Place of Performance
National Science Foundation	

Address

Arlington, VA 222301000

Time Zone US-America/New_York(GMT-5:00)

Inst. Code 4102852000

DUNS # 074811803

GO Program Announcement / Solicitation / Program Description No., or In response to Proposal & Award Policies & Procedures Guide (PAPPG).

No Program Announcement has been selected yet.
*You must select one or the PAPPG prior to filling out the rest of the Cover Sheet

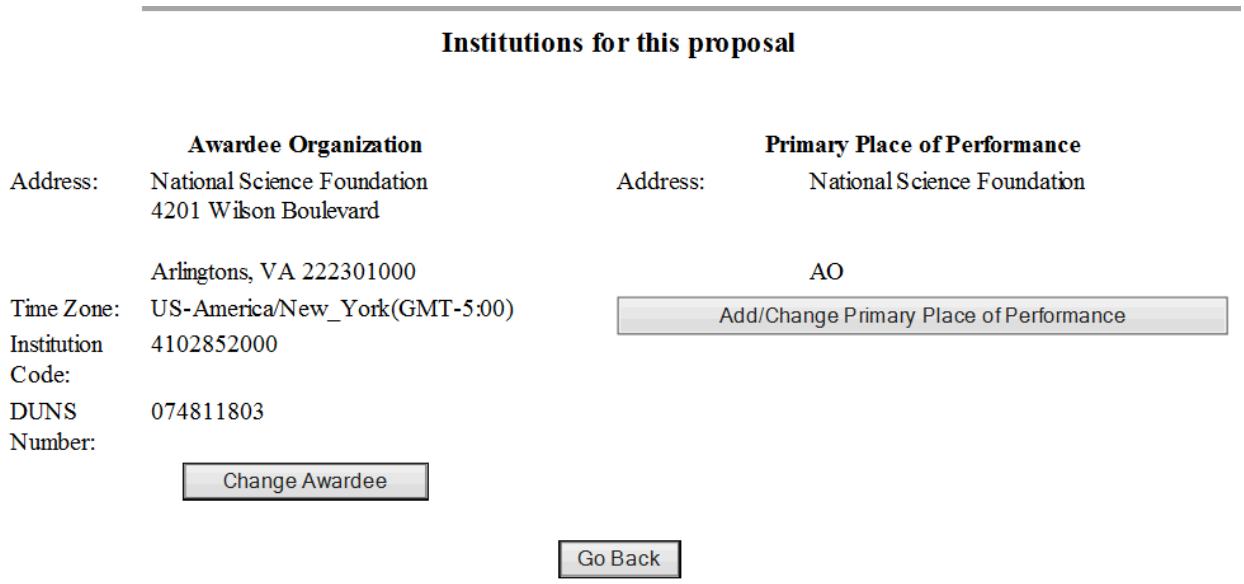
GO NSF Unit Consideration
No NSF Units have been selected yet.
*You must select one prior to filling out the rest of the Cover Sheet

GO *Remainder of the Cover Sheet

Go Back

Figure 1 Cover Sheet Components Form. The Go button for Awardee & Project/Performance Site Primary Location Selection is circled.

2. Click the **Go** button for Awardee & Primary Performance Site Primary Location (Figure 1). The **Institutions for This Proposal** screen displays (Figure 2) with the information on the Awardee & Primary Performance Site Primary Location. You have these options:
   - Change Awardee
   - Add/Change Project /Performance Site Primary Location



Institutions for this proposal

Awardee Organization		Primary Place of Performance	
Address:	National Science Foundation 4201 Wilson Boulevard Arlingtons, VA 222301000	Address:	National Science Foundation AO
Time Zone:	US-America/New_York(GMT-5:00)		Add/Change Primary Place of Performance
Institution Code:	4102852000		
DUNS Number:	074811803		

Change Awardee

Go Back

Figure 2 Institutions for This Proposal screen.

See also:

- Program Description/Announcement/Solicitation Number
- NSF Unit of Consideration
- Remainder of the Cover Sheet

Awardee & Project/Performance Site Primary Location Seclection

You may change both the Awardee Organization and Project/Performance Site Primary Location as necessary.

1. Access the **Cover Sheet Components Form** screen (Figure 1) (see Access and Print the Cover Sheet, Steps 1 and 2).

Cover Sheet Components Form

The NSF Cover Sheet within FastLane has been divided into 3 sections:

- Program Announcement / Solicitation Number Selection
- NSF Unit Consideration
- Remainder of Cover Sheet

To complete a section, click on the Go button, and click on OK to save the data.

GO Awardee Organization/Primary Place Of Performance Selection

Awardee Organization	Primary Place of Performance
National Science Foundation	

Address

Arlington, VA 222301000

Time Zone US-America/New_York(GMT-5:00)

Inst. Code 4102852000

DUNS # 074811803

GO Program Announcement / Solicitation / Program Description No., or In response to Proposal & Award Policies & Procedures Guide (PAPPG).

No Program Announcement has been selected yet.
*You must select one or the PAPPG prior to filling out the rest of the Cover Sheet

GO NSF Unit Consideration
No NSF Units have been selected yet.
*You must select one prior to filling out the rest of the Cover Sheet

GO *Remainder of the Cover Sheet

Go Back

Figure 1 Cover Sheet Components Form. The Go button for Awardee & Project/Performance Site Primary Location Selection is circled.

2. Click the **Go** button for Awardee & Primary Performance Site Primary Location (Figure 1). The **Institutions for This Proposal** screen displays (Figure 2) with the information on the Awardee & Primary Performance Site Primary Location. You have these options:
   - Change Awardee
   - Add/Change Project /Performance Site Primary Location

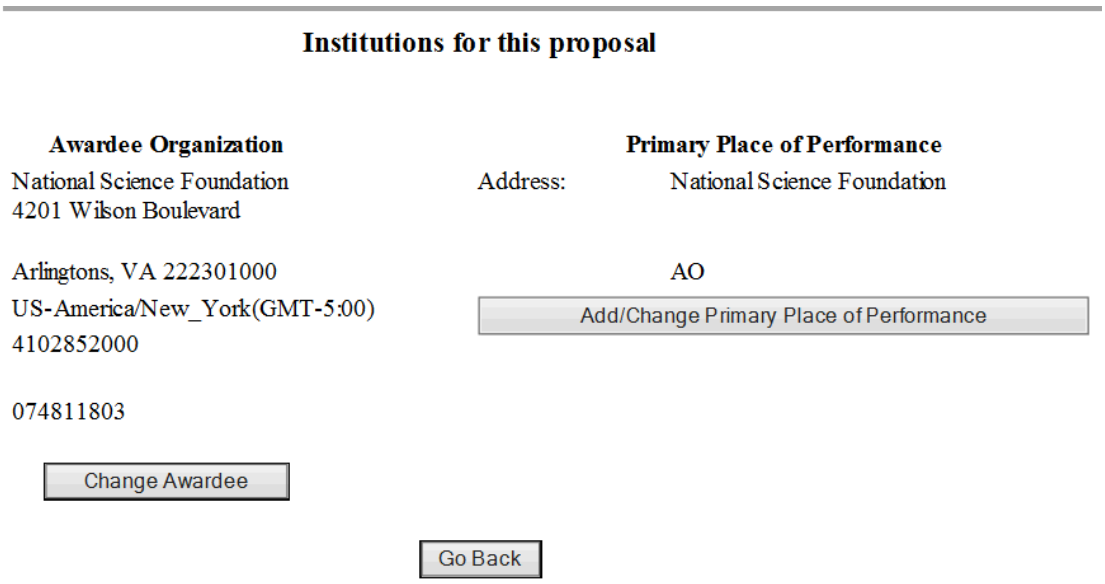


Figure 2 Institutions for This Proposal screen.

See also:

- Program Description/Announcement/Solicitation Number
- NSF Unit of Consideration
- Remainder of the Cover Sheet

Add/Change Project/Performance Site Primary Location

1. Access the **Institutions for This Proposal** screen (Figure 1) (see Awardee & Project/ Performance Site Primary Location).

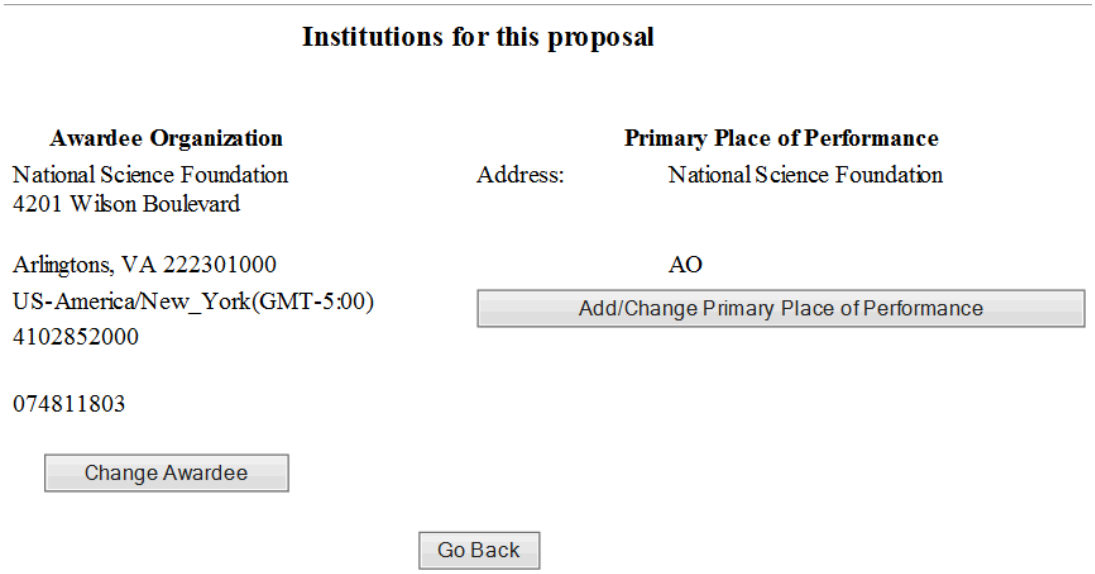


Figure 1 Institutions for This Proposal screen. The Add/Change Primary Place of Performance button is circled.

2. Click the **Add/Change Primary Place of Performance** button (Figure 1). The **Add/Change Primary Place of Performance** screen displays (Figure 2), where you enter the Primary Place of Performance.

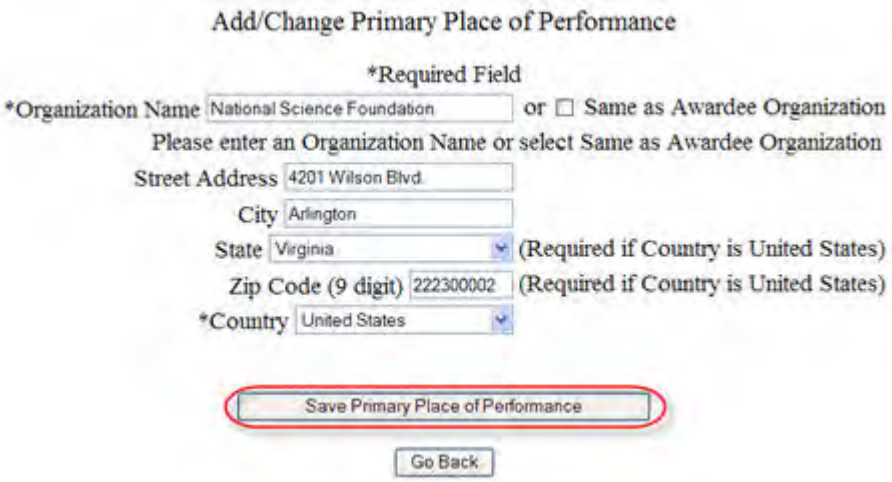


Figure 2 Add/Change Primary Place of Performance screen. The Save Primary Place of Performance button is circled.

3. Either enter the Organization Name or click Same as Awardee Organization (Figure 2):
   - If the Same as Awardee Organization box is clicked, the Organization Name will match the Awardee Organization.
   - Enter the full address for the Primary Place of Performance
   - If the Country selected is the United States, a State must be selected.
4. Click the **Add/Change Primary Place of Performance** button (Figure 2). A screen displays (Figure 3) with the message that the Primary Place of Performance has successfully been saved.

Figure 3 Screen with message that the Primary Place of Performance has been successfully saved.

5. Click the **Go Back** button (Figure 3). The **Institutions for This Proposal** screen displays (Figure 4) with the information for the organization you selected.

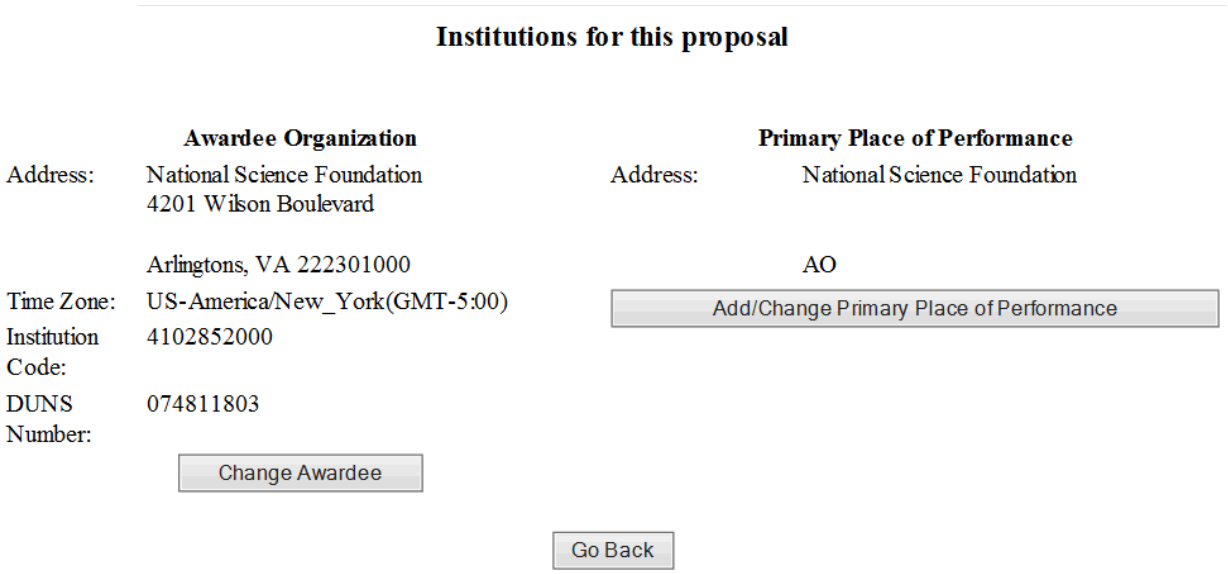


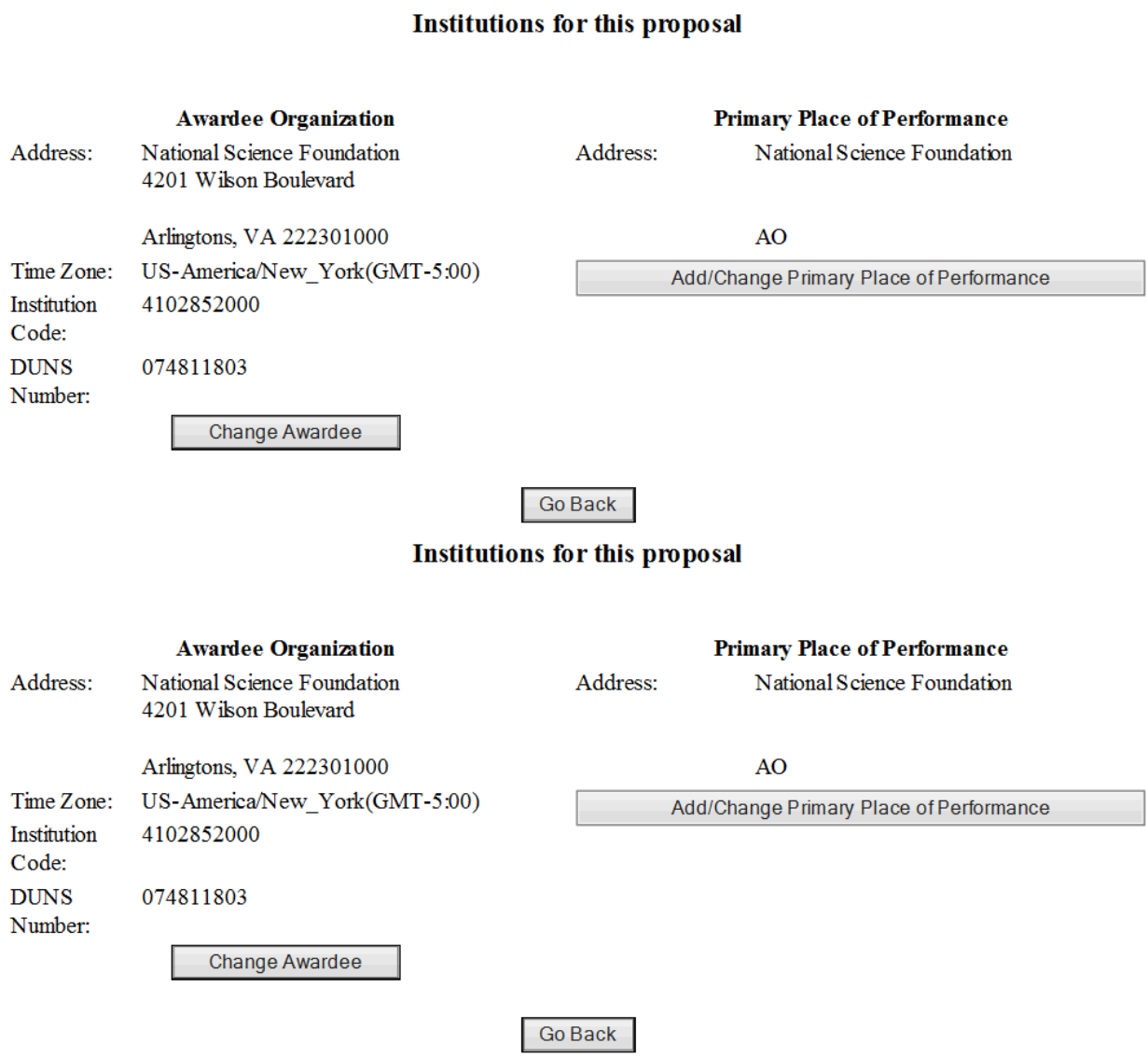
Figure 4 Institutions for This Proposal screen. The Primary Place of Performance section is boxed.

See also:

- Program Description/Announcement/Solicitation Number.
- NSF Unit of Consideration
- Remainder of the Cover Sheet

Change Awardee

1. Access the **Institutions for This Proposal** screen (Figure 1) (see Awardee & Project/Performance Site Primary Location).



Institutions for this proposal

Awardee Organization		Primary Place of Performance	
Address:	National Science Foundation 4201 Wilson Boulevard Arlingtons, VA 222301000	Address:	National Science Foundation AO
Time Zone:	US-America/New_York(GMT-5:00)		Add/Change Primary Place of Performance
Institution Code:	4102852000		
DUNS Number:	074811803		

Change Awardee

Go Back

Institutions for this proposal

Awardee Organization		Primary Place of Performance	
Address:	National Science Foundation 4201 Wilson Boulevard Arlingtons, VA 222301000	Address:	National Science Foundation AO
Time Zone:	US-America/New_York(GMT-5:00)		Add/Change Primary Place of Performance
Institution Code:	4102852000		
DUNS Number:	074811803		

Change Awardee

Go Back

Figure 1 Institutions for This Proposal screen. The Change Awardee button is circled.

2. Click the **Change Awardee** button (Figure 1). The **Institution Search** screen displays (Figure 2), where you can search for and select the organization.

Figure 2 Institution Search screen. The Locate Awardee button is circled.

3. Select the type of search option (Figure 2):
   - **Begins with** returns all organizations whose name begins with the text entered.
   - **Ends with** returns all organizations whose name ends with the text entered.
   - **Contains** returns all organizations whose name contains the text entered.
4. Type in the text box the search string (at least three characters) to search for (Figure 2).
5. Click the **Locate Awardee** button (Figure 2). The **Institutions Located** screen displays (Figure 3).

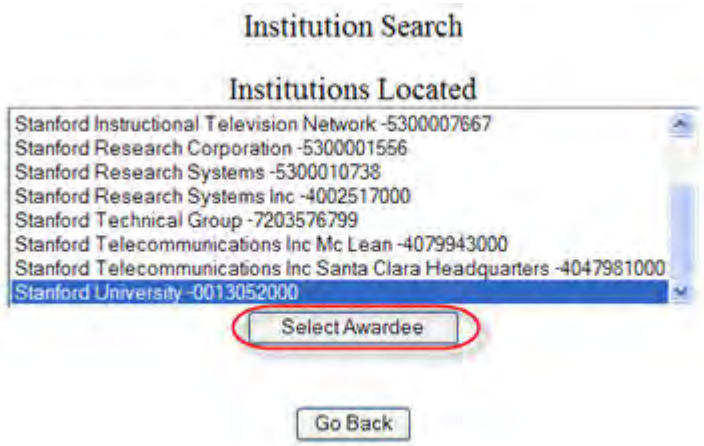


Figure 3 Institutions Located screen. The Select Awardee button is circled.

6. Highlight the organization on the **Institutions Located** list (Figure 3).
7. Click the **Select Awardee** button (Figure 3). A screen displays (Figure 4) with the message that the Awardee Organization has been changed.

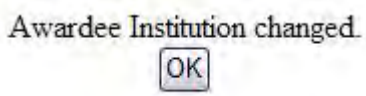


Figure 4 Screen with the message that the Awardee Organization has been changed.

8. Click the **OK** button (Figure 4). The **Institutions for This Proposal** screen displays (Figure 5) with the information for the organization you selected.

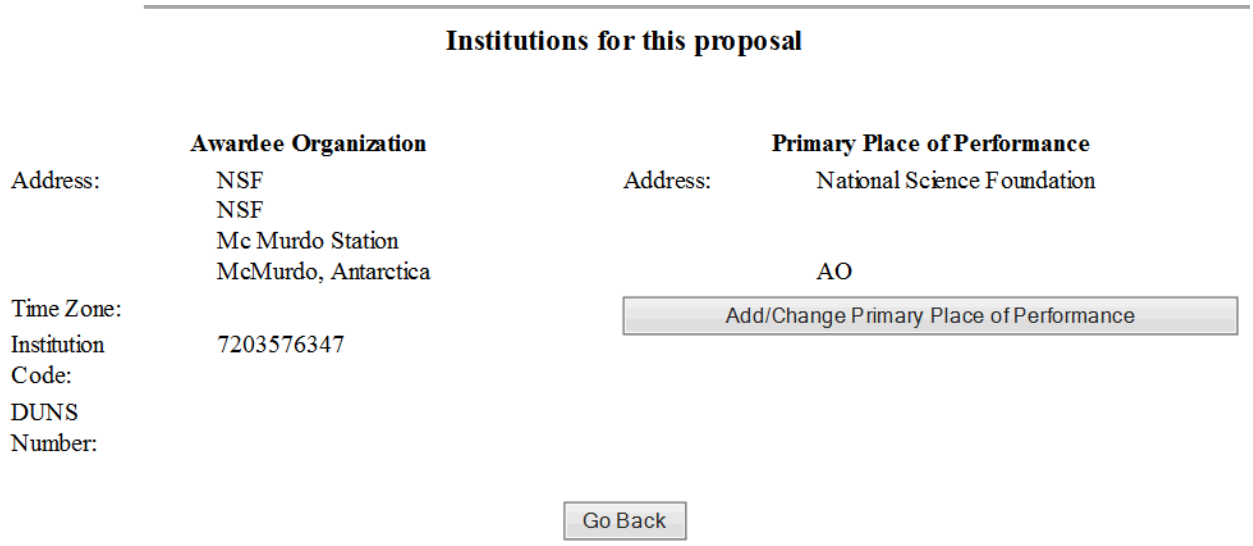


Figure 5 Institutions for This Proposal screen. The Awardee Organization section is boxed.

See also:

- Program Description/Announcement/Solicitation Number
- NSF Unit of Consideration
- Remainder of the Cover Sheet

Program Description/Announcement/Solicitation Number

You must select the applicable program description, announcement, or solicitation to which theproposal is responding. If you are not submitting the proposal in response to any of these options, highlight — ***Proposal & Award Policies & Procedures Guide (PAPPG)*** on the **Program Announcements and Solicitation Number** list.

Compliance with this requirement is critical to NSF's ability to determine the relevant guidelines for processing the proposal.

1. Access the **Cover Sheet Components Form** screen (Figure 1) (see Access and Print the Cover Sheet, Steps 1 and 2).

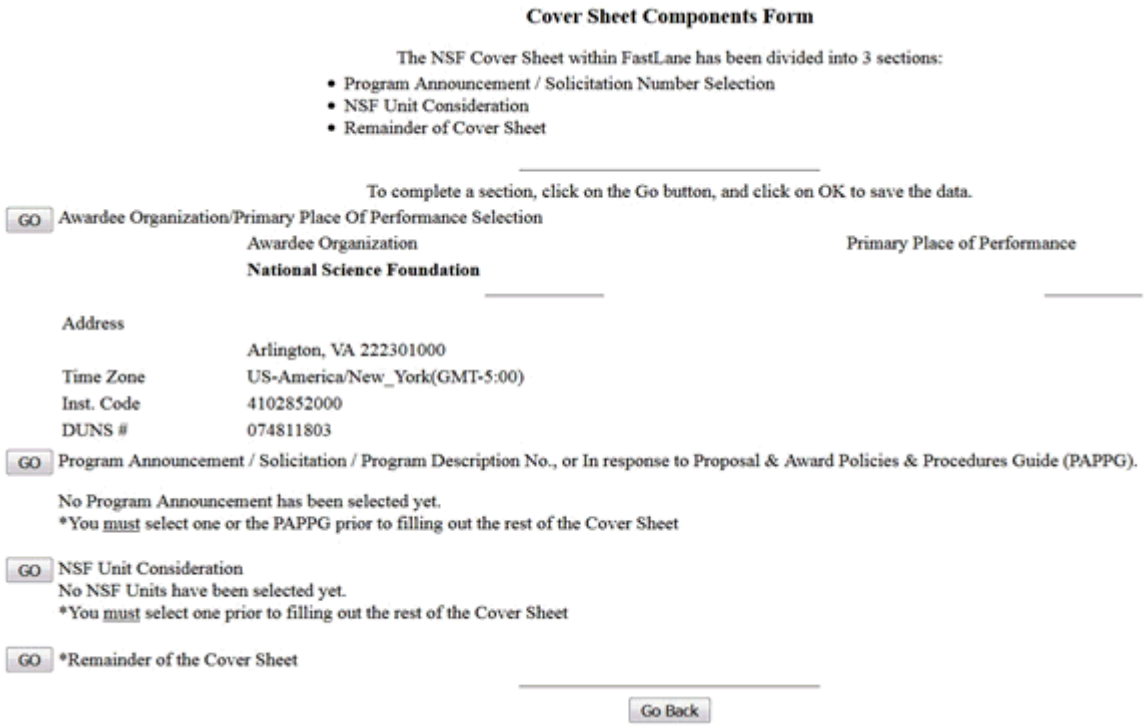


Figure 1 Cover Sheet Components Form screen. The Go button for Program Announcement/Solicitation/Program Description No. is circled.

2. Click the **Go** button for Program Announcement/Solicitation/Program Description No. (Figure 1). The **Program Announcements/Solicitation Number Selection** screen displays (Figure 2) with a listing of every current NSF Program Announcement or Solicitation.

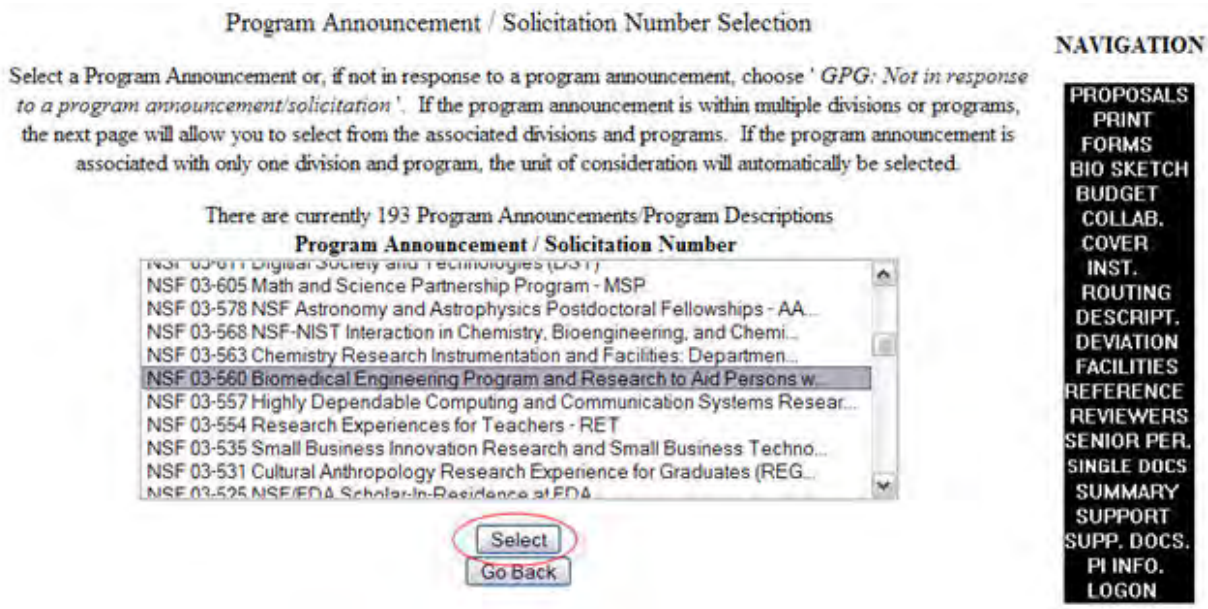


Figure 2 Program Announcement / Solicitation Number Selection screen. The Select button is circled.

3. Highlight the Program Announcement or Solicitation Number for the proposal from the **Program Announcement / Solicitation Number** list (Figure 2). If the proposal is not in response to a Program Announcement, highlight — ***Proposal & Award Policies & Procedures Guide***
4. Click the **Select** button (Figure 2). The **Unit Selection Lists** (Figure 3) screen displays. See NSF Unit of Consideration for instructions.

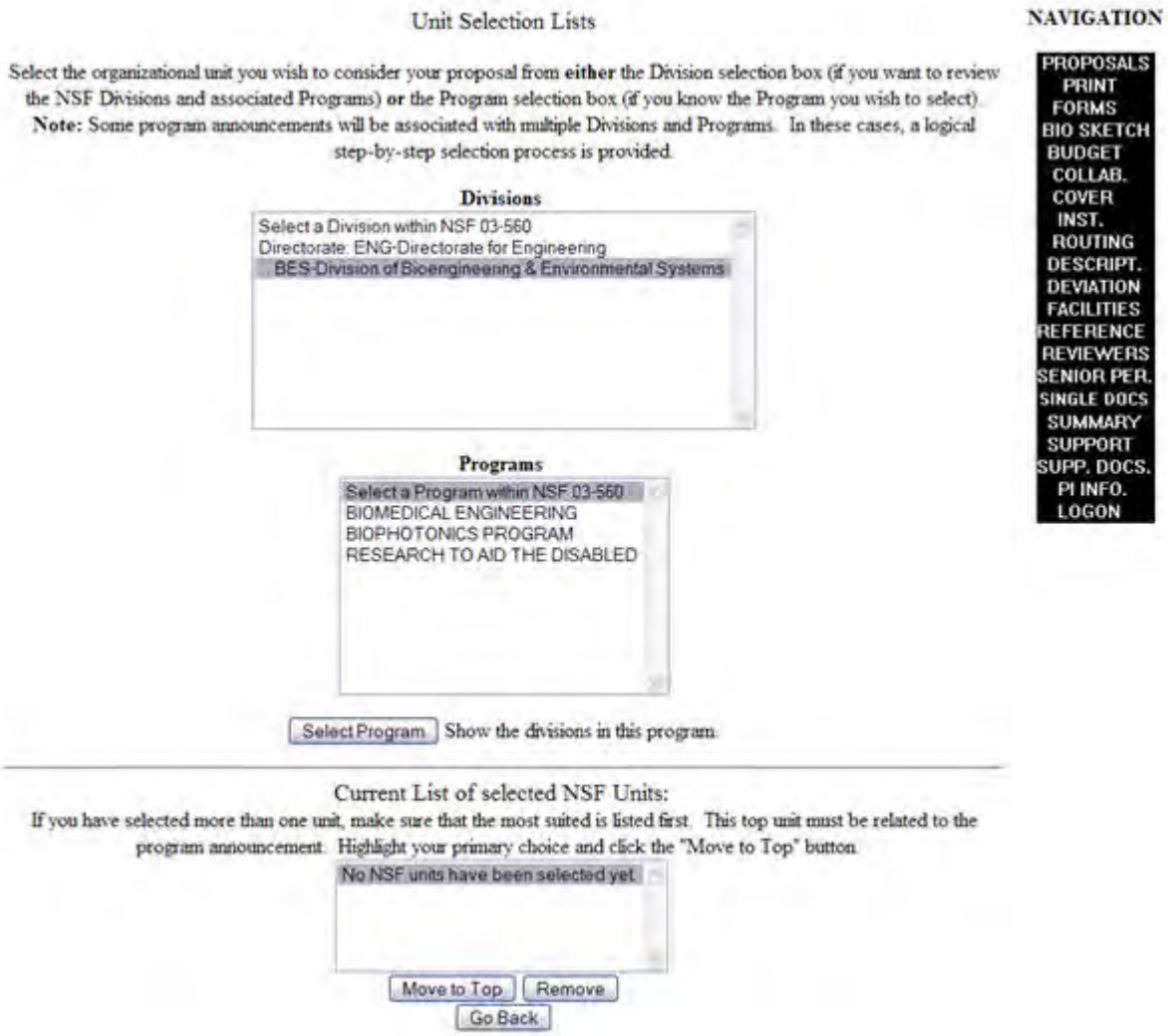


Figure 3 Unit Selection Lists screen.

See also:

- NSF Unit of Consideration
- Remainder of the Cover Sheet

NSF Unit of Consideration

NSF Unit of Consideration

You must select the NSF Unit associated with your selection for Program Description/Announcement/Solicitation Number.

You cannot enter the NSF Unit of Consideration component on the Cover Sheet, until you have completed the Program Description/Announcement/Solicitation Number component (see Program Description/Announcement/Solicitation Number. for instructions).

Access the **Unit Selection Lists** screen (Figure 1) in either of these ways:

- Choose a Program Announcement or Solicitation for the proposal (see Program Description/Announcement/Solicitation Number for instructions). The **Unit Selection List** screen displays automatically.
- On the **Cover Sheet Components Form** screen, click the **Go** button for NSF Unit Consideration. The **Unit Selection Lists** screen *if you have already completed the Program Description/Announcement/Solicitation Number section.*

Figure 1 Unit Selection Lists screen.

On the **Unit Selection Lists** screen (Figure 1), you can do the following:

- Select the NSF Division
- Select the NSF Primary Program
- Remove a Selected NSF Unit

See also Remainder of the Cover Sheet.

NSF Unit of Consideration

You must select the NSF Unit associated with your selection for Program Description/Announcement/Solicitation Number.

You cannot enter the NSF Unit of Consideration component on the Cover Sheet, until you have completed the Program Description/Announcement/Solicitation Number component (see Program Description/Announcement/Solicitation Number. for instructions).

Access the **Unit Selection Lists** screen (Figure 1) in either of these ways:

- Choose a Program Announcement or Solicitation for the proposal (see Program Description/Announcement/Solicitation Number for instructions). The **Unit Selection List** screen displays automatically.
- On the **Cover Sheet Components Form** screen, click the **Go** button for NSF Unit Consideration. The **Unit Selection Lists** screen *if you have already completed the Program Description/Announcement/Solicitation Number section.*

Figure 1 Unit Selection Lists screen.

On the **Unit Selection Lists** screen (Figure 1), you can do the following:

- Select the NSF Division
- Select the NSF Primary Program
- Remove a Selected NSF Unit

See also Remainder of the Cover Sheet.

Select the NSF Division

1. Access the **Unit Selection Lists** screen (Figure 1) (see NSF Unit of Consideration).

Note: *If there is only one division for the Program Announcement/Solicitation you selected,* that division automatically displays in the **Divisions** list. Proceed to the **Programs** list on the **Unit Selections Lists** screen (see Select the NSF Primary Program for instructions).

If the division is not automatically listed:

2. On the **Unit Selection Lists** screen (Figure 1), highlight the division in the **Divisions** list.

Figure 1 Unit Selection Lists screen. The Select Division button is circled.

3. Click the **Select Division** button (Figure 1). The page refreshes and displays only the programs associated with that division in the **Programs** list.

Figure 2 Unit Selections List screen with the Programs listed that are associated only with the Division that you selected.

4. Proceed to the **Programs List** on the **Unit Selections List** screen (see Select the NSF Primary Program for instructions).

Select the NSF Primary Program

1. Access the **Unit Selection Lists** screen (Figure1) (see NSF Unit of Consideration).

Figure 1 Unit Selection Lists screen. The Select Program button is circled.

2. In the **Programs** list (Figure 1), highlight the program to select it.
3. Click the **Select Program** button (Figure 1). The **Unit Selection Lists** screen displays (Figure 2) with the division and program you selected at the bottom of the screen.

Figure 2 Unit Selections List showing the NSF unit, which was added automatically once the program was selected.

4. You can continue on the **Unit Selections Lists** screen to select secondary divisions and programs as you require. Each time, FastLane will show the appropriate NSF unit in the **Current List of Selected NSF Units** section.

Remove a Selected NSF Unit

You can only remove a unit if more than one unit displays in the **Current List of Selected NSF Units**.

1. Access the **Unit Selection Lists** screen (Figure 1) (see NSF Unit of Consideration).

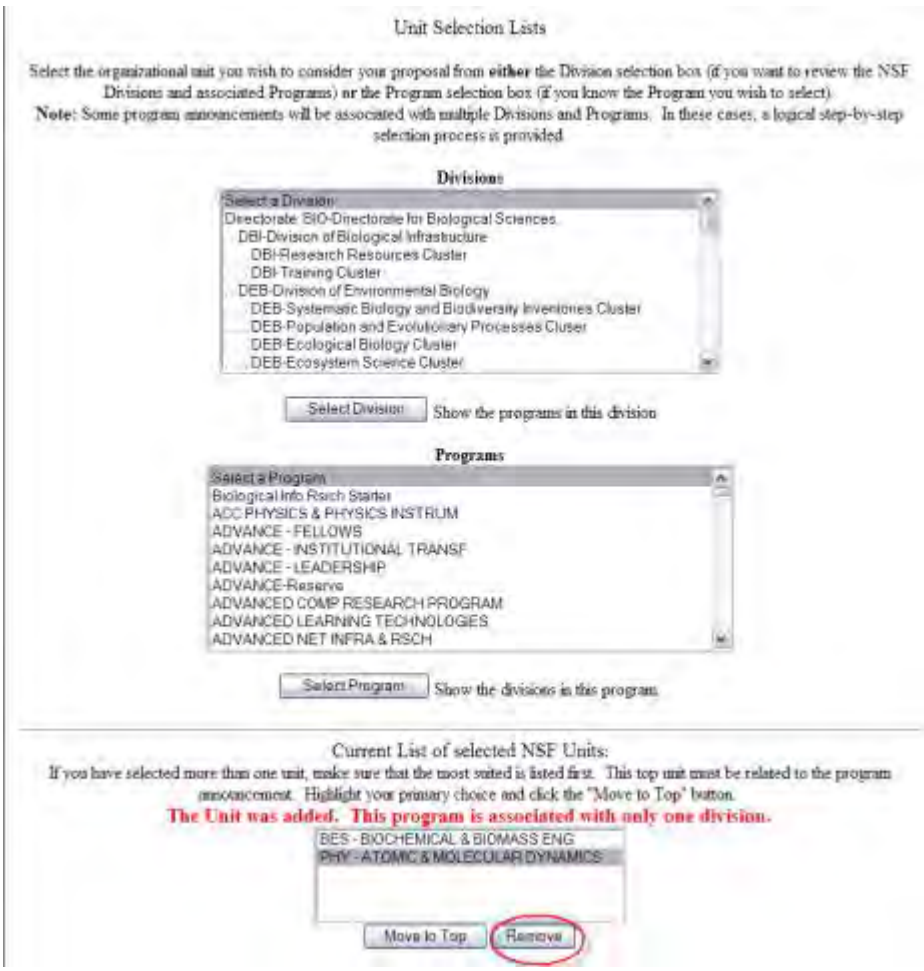


Figure 1 Current List of Selected NSF Units screen. The Remove button is circled.

2. From the **Current List of Selected NSF Units** (Figure 1), highlight the unit to be removed.
3. Click the **Remove** button (Figure 1). The **Unit Selection Lists** screen displays (Figure 2) with the message that the unit has been removed.

Figure 2 Unit Selection Lists screen with the unit now removed.

Remainder of Cover Sheet

Remainder of the Cover Sheet

You cannot enter the Remainder of the Cover Sheet component until you have completed the first three components of the Cover Sheet.

The Remainder of the Cover Sheet component consists of:

- Information pertinent to this proposal specifically:
  - Proposal Title
  - Budget and Duration Information
  - Announcement and Consideration
  - PI Information (automatically displayed)
  - Co-PI Information
  - Previous NSF Awards
  - Other Federal Agencies
  - Awardee Organization
  - Primary Place of Performance (automatically displayed)
  - Other Information
- Certifications the Authorized Organizational Representative (AOR) signs by electronically signing the proposal

- Certification for Authorized Organizational Representative (or Equivalent) or Individual Applicant
- Drug-Free Workplace Certification
- Conflict of Interest Certification
- Debarment and Suspension Certification (the AOR must complete this section)
- Certification Regarding Lobbying (see "Disclosing Lobbying Activities")
- Certification for Contracts, Grants, Loans, and Cooperative Agreements
- Certification Regarding Nondiscrimination
- Certification Regarding Flood Hazard Insurance
- Certification Regarding Responsible Conduct of Research (RCR)
- Certification Regarding Organizational Support
- Certification Regarding Federal Tax Obligations
- Certification Regarding Unpaid Federal Tax Liability
- Certification Regarding Criminal Convictions
- Certification Regarding Dual Use Research of Concern

• Authorized Organizational Representative Information (which is automatically added when the AOR electronically signs the proposal)

See Work on the Remainder of the Cover Sheet for instructions on how to complete the Cover Sheet.

Remainder of the Cover Sheet

You cannot enter the Remainder of the Cover Sheet component until you have completed the first three components of the Cover Sheet.

The Remainder of the Cover Sheet component consists of:

• Information pertinent to this proposal specifically:
- Proposal Title
- Budget and Duration Information
- Announcement and Consideration
- PI Information (automatically displayed)
- Co-PI Information
- Previous NSF Awards
- Other Federal Agencies
- Awardee Organization
- Primary Place of Performance (automatically displayed)
- Other Information

• Certifications the Authorized Organizational Representative (AOR) signs by electronically signing the proposal
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- Conflict of Interest Certification
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- Certification Regarding Criminal Convictions
- Certification Regarding Dual Use Research of Concern

• Authorized Organizational Representative Information (which is automatically added when the AOR electronically signs the proposal)

See Work on the Remainder of the Cover Sheet for instructions on how to complete the Cover Sheet.

Work on the Remainder of the Cover Sheet

This document shows you how to:

- Access the **Remainder of the Cover Sheet** screen
- Print the **Remainder of the Cover Sheet** screen
- Navigate the **Remainder of the Cover Sheet** screen
- Save your work on the **Remainder of the Cover Sheet** screen

Access the Remainder of the Cover Sheet Screen

1. Access the **Cover Sheet Components Form** screen (Figure 1) (see Access and Print the Cover Sheet, Steps 1 and 2).

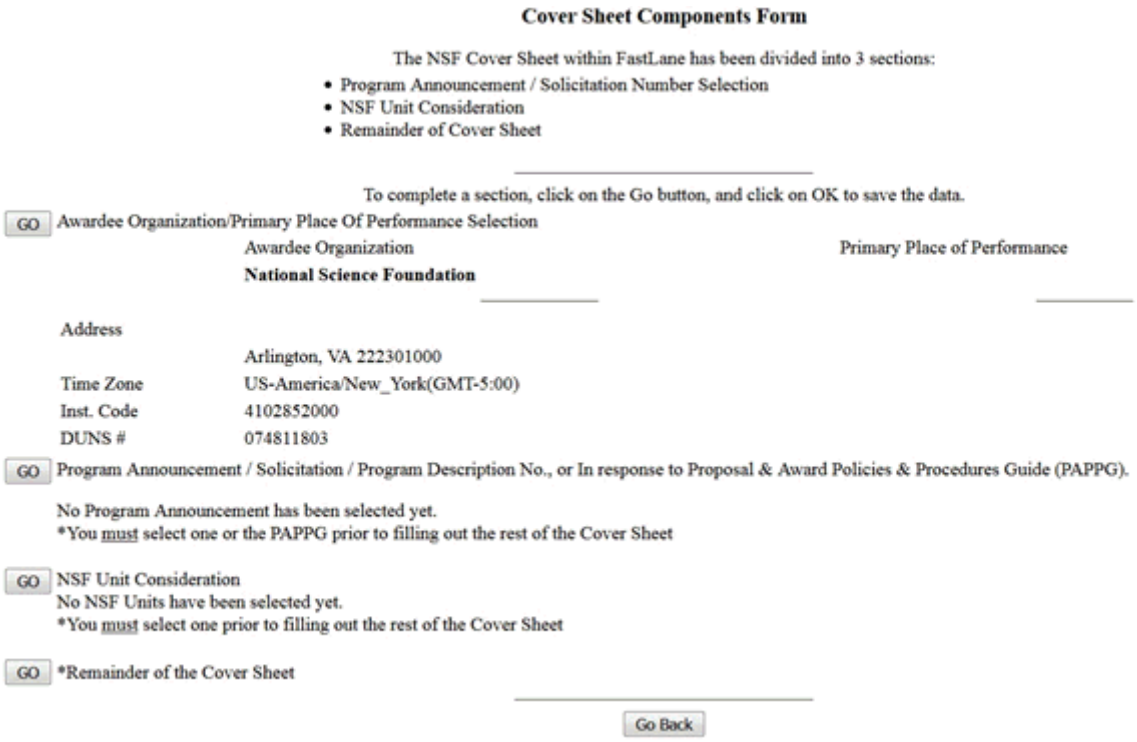


Figure 1 Cover Sheet Components Form screen. The Go button for Remainder of the Cover Sheet is circled.

2. Click the **Go** button for Remainder of the Cover Sheet (Figure 1). **The Remainder of the Cover Sheet** screen displays (Figure 2) with these sections for you to work on:
   - Proposal Title
   - Budget and Duration
   - Announcement and Consideration
   - PI Information
   - Co-PI Information
   - Previous NSF Awards
   - Other Federal Agencies
   - Awardee Organization
   - Primary Place of Performance
   - Other Information
   - Certification
   - Authorized Representative

   Click on a link above for the instructions for that section.

Not for distribution

Remainder of the Cover Sheet

Proposal Title | Budget and Duration | Announcement and Consideration | PI Information
Co-PI Information | Previous NSF Awards | Other Federal Agencies | Awardee Organization
Primary Place of Performance | Other Information | Certification | Authorized Representative
Top of Page | Bottom of Page

Title of Proposed Project

Enter the Title of Your Proposed Project:
SE ProdValid Jenkins Test

Proposal Title | Budget and Duration | Announcement and Consideration | PI Information
Co-PI Information | Previous NSF Awards | Other Federal Agencies | Awardee Organization
Primary Place of Performance | Other Information | Certification | Authorized Representative
Top of Page | Bottom of Page

Budget And Duration Information

Requested Amount: $ 4444.00 (Note: The requested amount is calculated from the budget forms.)

Proposal Duration (in months): 24 Requested Starting Date (MM/DD/YYYY): 12/12/2016

Proposal Title | Budget and Duration | Announcement and Consideration | PI Information
Co-PI Information | Previous NSF Awards | Other Federal Agencies | Awardee Organization
Primary Place of Performance | Other Information | Certification | Authorized Representative
Top of Page | Bottom of Page

Announcement And Consideration Information

Program Announcement/Solicitation Number: **NSF 15-537**

Deadline/Target Date: Deadline Date 03/08/2016

For consideration by the following listed NSF Organization Unit(s):

- **DRL - STEM - Computing Partnerships**

Figure 2 Upper portion of the Remainder of the Cover Sheet screen. The navigation links are circled that appear at the top of each section.

Print the Remainder of the Cover Sheet Screen

On the **Remainder of the Cover Sheet** screen (Figure 2), use the **Print** command on your browser to print the entire screen.

Navigate the Remainder of the Cover Sheet Screen

On the **Remainder of the Cover Sheet** screen, use the navigation links at the top of each section to go from section to section (Figure 2 and Figure 3). These also include links to go to the top and bottom of the screen.

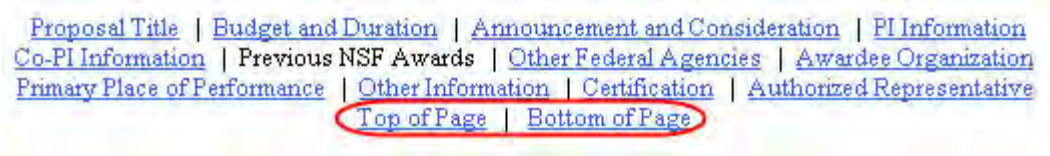


Figure 3 Navigation links at the top of each section on the Remainder of the Cover Sheet screen. The Top of Page and Bottom of Page links are circled.

Save Your Work on the Remainder of the Cover Sheet Screen

Click the **OK** button (Figure 4) at the bottom of the **Remainder of the Cover Sheet** screen every time you leave the **Remainder of the Cover Sheet** form screen to save newly entered information. (You have to type in only the **Proposal Title** to save the **Remainder of the Cover Sheet**.) A screen displays (Figure 5) with the message that the Cover Sheet has been saved.

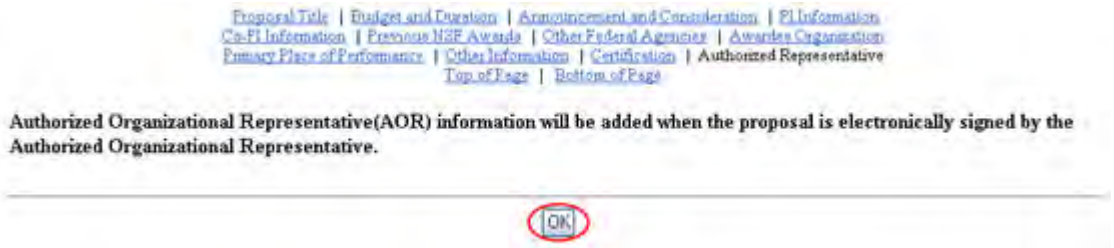


Figure 4 Lower portion of the Remainder of the Cover Sheet screen. The OK button is circled.

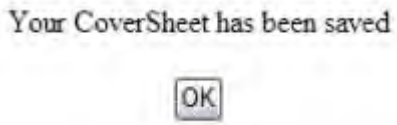


Figure 5 Screen with the message that the Cover Sheet has been saved.

See also:

- Proposal Title
- Budget and Duration Information
- Announcement and Consideration
- Co-PI Information
- Previous NSF Awards
- Other Federal Agencies
- Awardee Organization
- Other Information

Proposal Title

The title of the proposal must be brief, scientifically or technically valid, intelligible to scientifically or technically literate readers, and suitable for use in the public press. NSF may edit the title of the project before making an award. The title is limited to 180 characters.

1. Access the **Remainder of the Cover Sheet** screen (Figure 1) (see Access the Remainder of the Cover Sheet Screen).

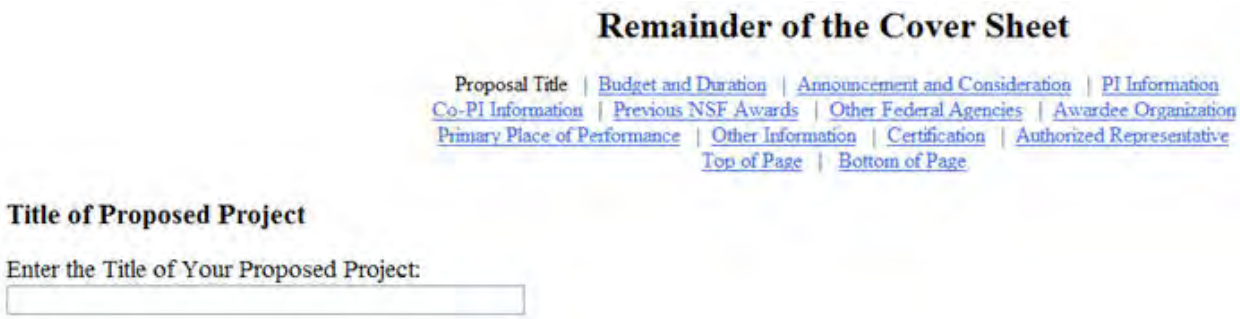


Figure 1 Proposal Title section of the Remainder of the Cover Sheet screen.

2. Type the proposal title.

See also:

- Budget and Duration Information
- Announcement and Consideration
- Co-PI Information
- Previous NSF Awards
- Other Federal Agencies
- Awardee Organization
- Other Information

Budget and Duration Information

1. Access the **Remainder of the Cover Sheet** screen (Figure 1) (see Access the Remainder of the Cover Sheet Screen). Click **Budget and Duration** (Figure 1). The **Budget and Duration** section displays (Figure 2).

Figure 1 Remainder of the Cover Sheet screen. The Budget and Duration link is circled.

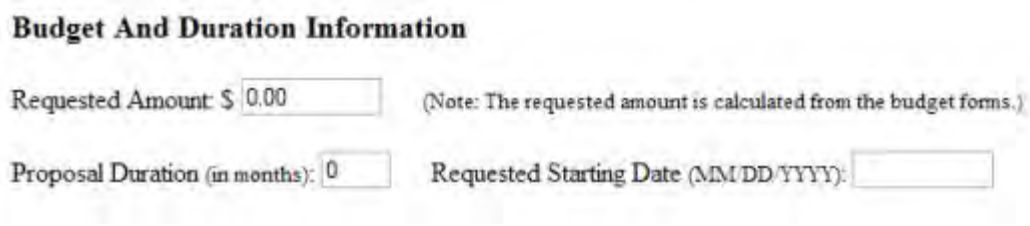


Figure 2 Budget and Duration Information section of the Remainder of the Cover Sheet screen.

2. In the **Requested Amount** box (Figure 2), type the requested amount only if you are not filling out the Budget form. If you have filled out the Budget form, the amount you requested on the Budget form automatically displays in this box.
3. In the **Proposal Duration** box (Figure 2), type the duration in months for which you have requested NSF support.
4. In the **Requested Start Date** box (Figure 2), type the requested start date in mm/dd/yyyy format with the slashes. Please allow at least 6 months for the NSF review, processing, and decision process, except in special situations.

See also:

- Proposal Title
- Announcement and Consideration
- Co-PI Information
- Previous NSF Awards
- Other Federal Agencies
- Awardee Organization
- Other Information

Announcement and Consideration

1. Access the **Remainder of the Cover Sheet** screen (Figure 1) (see Access the Remainder of the Cover Sheet Screen).

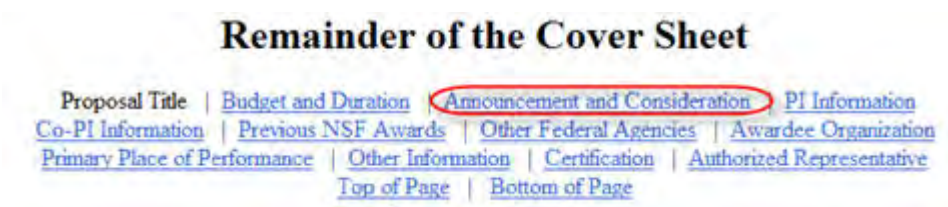


Figure 1 Remainder of the Cover Sheet screen. The Announcement and Consideration link is circled.

2. Click **Announcement and Consideration** (Figure 1). The **Announcement and Consideration** section displays (Figure 2). FastLane automatically displays these sections:
   - Program Announcement/Solicitation Number
   - Listed NSF Organization Unit

Figure 2 Announcement and Consideration section of the Remainder of the Cover Sheet screen.

3. Select the closing date from the **Closing Date** menu (Figure 2). You must submit the proposal on or before this date.

See also:

- Proposal Title
- Budget and Duration Information
- Co-PI Information
- Previous NSF Awards
- Other Federal Agencies
- Awardee Organization
- Other Information

Co-PI Information

NSF permits a maximum of four Co-PIs on a proposal. The Co-PI must already be registered with FastLane as a PI or Co-PI.

1. Access the **Remainder of the Cover Sheet** screen (Figure 1) (see Access the Remainder of the Cover Sheet Screen).

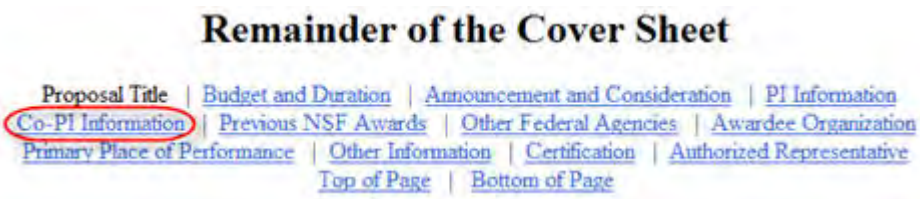


Figure 1 Remainder of the Cover Sheet screen. The Co-PI Information link is circled.

2. Click **Co-PI Information** (Figure 1). The **Co-Principal Investigator (Co-PI) Information** section displays (Figure 2).

Co-Principal Investigator (Co-PI) Information

NSF proposals can have at most four co-Principal Investigators

Only co-PIs entered here will be available on other forms in this proposal.

To add co-PIs, enter NSF ID or primary registered email addresses of the co-PIs and then save the remainder of the cover sheet by clicking on the **"OK"** button at the bottom of this screen.
To remove co-PIs, check the "Remove co-PI" checkbox and then save the remainder of the cover sheet by clicking on the **"OK"** button at the bottom of this screen.

Name	Enter the co-PI's NSF ID (000######) or primary registered email address (abc@xyz.gov) to add a co-PI		
	NSF ID/Email:		Enter NSF ID or email address to add a co-PI
	NSF ID/Email:		Enter NSF ID or email address to add a co-PI
	NSF ID/Email:		Enter NSF ID or email address to add a co-PI
	NSF ID/Email:		Enter NSF ID or email address to add a co-PI

Figure 2 Co-Principal Investigator (Co-PI) Information section of the Remainder of the Cover Sheet screen.

3. Type only the email address for each Co-PI that you want to add (Figure 2).
4. Click the **OK** button at the bottom of the **Remainder of the Cover Sheet** screen. When the information is saved, the **Co-Principal Investigator (Co-PI) Information** section displays as in Figure 3. You can remove a Co-PI by clicking in the check mark box for that Co-PI.

Co-Principal Investigator (Co-PI) Information

NSF proposals can have at most four co-Principal Investigators

Only co-PIs entered here will be available on other forms in this proposal.

To add co-PIs, enter NSF ID or primary registered email addresses of the co-PIs and then save the remainder of the cover sheet by clicking on the **"OK"** button at the bottom of this screen.
To remove co-PIs, check the "Remove co-PI" checkbox and then save the remainder of the cover sheet by clicking on the **"OK"** button at the bottom of this screen.

Name	Enter the co-PI's NSF ID (000######) or primary registered email address (abc@xyz.gov) to add a co-PI		
Greg Block	☐ (Check to remove Greg Block as a co-PI)		
	NSF ID/Email:		Enter NSF ID or email address to add a co-PI
	NSF ID/Email:		Enter NSF ID or email address to add a co-PI
	NSF ID/Email:		Enter NSF ID or email address to add a co-PI

Figure 3 The Co-Principal Investigator (Co-PI) Information section of the Remainder of the Cover Sheet screen with a check mark box to remove a Co-PI.

See also:

- Proposal Title
- Budget and Duration Information
- Announcement and Consideration
- Previous NSF Awards
- Other Federal Agencies
- Awardee Organization

- Other Information

Previous NSF Awards

1. Access the **Remainder of the Cover Sheet** screen (Figure 1) (see Access the Remainder of the Cover Sheet Screen).

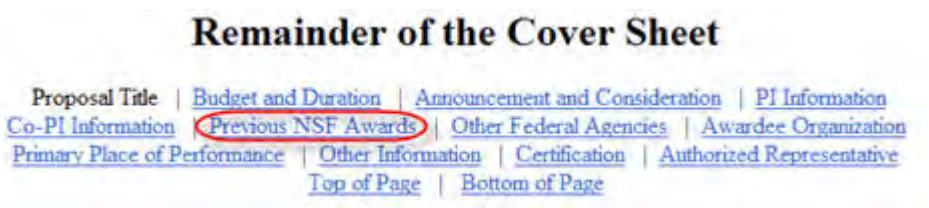


Figure 1 Remainder of the Cover Sheet screen. The Previous NSF Awards link is circled.

2. Click **Previous NSF Awards** (Figure 1). The **Previous NSF Awards** section displays (Figure 2).

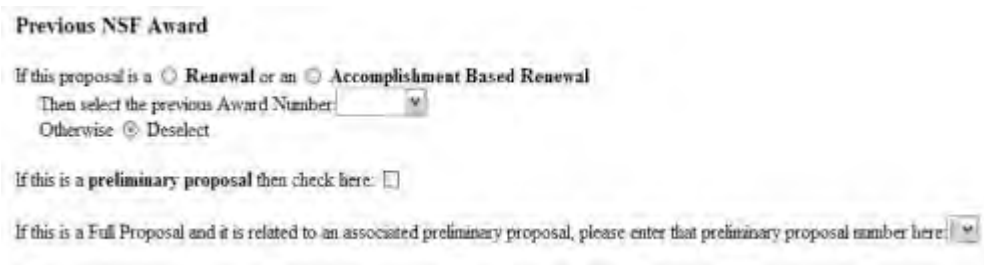


Figure 2 Previous NSF Awards section of the Remainder of the Cover Sheet screen.

3. Click the radio button for either **Renewal** or **Accomplishment-Based Renewal** *if the proposal fits either of these categories* (Figure 2).
4. In the previous **Award Number** box (Figure 2), type in the previous NSF Award Number *if you have a previous award.*
5. Click the check mark box for preliminary proposal (Figure 2) *if the proposal is preliminary and not a full proposal* (Figure 2).
6. Type the Preproposal ID *if the proposal is a full proposal related to that prepreposal* (Figure 2).

See also:

- Proposal Title
- Budget and Duration Information
- Announcement and Consideration
- Co-PI Information
- Other Federal Agencies
- Awardee Organization
- Other Information

Other Federal Agencies

1. Access the **Remainder of the Cover Sheet** screen (Figure 1) (see Access the Remainder of the Cover Sheet Screen).

Figure 1 Remainder of the Cover Sheet screen. The Other Federal Agencies link is circled.

2. Click **Other Federal Agencies** on the **Remainder of the Cover Sheet** screen (Figure 1). The **Other Federal Agencies** section displays (Figure 2).

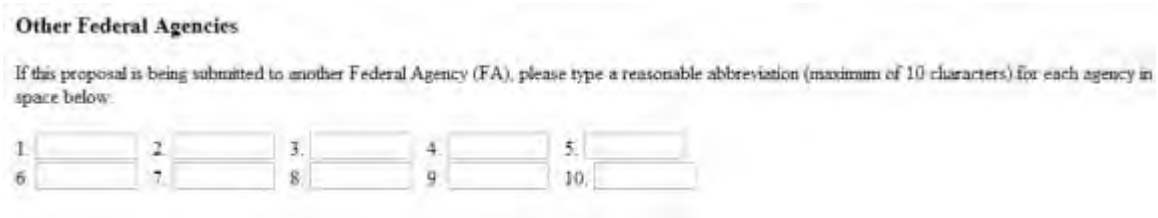


Figure 2 Other Federal Agencies section of the Remainder of the Cover Sheet screen.

3. In the boxes provided (Figure 2), type the abbreviated name (10 characters maximum) of any other federal agencies that you are submitting the proposal to.

See also:

- Proposal Title
- Budget and Duration Information
- Announcement and Consideration
- Co-PI Information
- Previous NSF Awards
- Awardee Organization
- Other Information

Awardee Organization

1. Access the **Remainder of the Cover Sheet** screen (Figure 1) (see Access the Remainder of the Cover Sheet Screen).

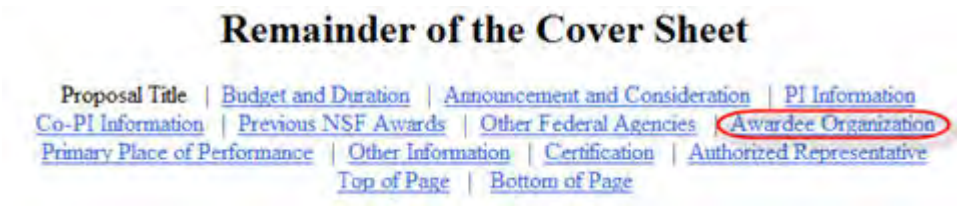


Figure 1 Remainder of the Cover Sheet screen. The Awardee Organization link is circled.

2. Click **Awardee Organization** (Figure 1). The **Awardee Organization** section displays (Figure 2).

Figure 2 Awardee Organization Information section of the Remainder of the Cover Sheet screen.

The Awardee Organization information automatically displays if you submitted this information when you or another person registered your organization. The cover requires the following information:

- Organization name
- Address
- Organization code
- Data Universal Numbering System (DUNS) number
- Employer Identification Number (EIN) or Taxpayer Identification Number (TIN)

The Office of Management and Budget (OMB) issued a policy directive which requires proposers to provide a DUNS number when applying for a new award or renewal of an award under Federal grants or cooperative agreements. In accordance with this mandate, NSF requires that institutions registering to use NSF's electronic systems have a valid and active System for Award Management (SAM) registration and an active DUNS number. *If your organization does not have a unique nine-digit DUNS number,* contact Dun and Bradstreet at (866) 705-5711 or http://fedgov.dnb.com/webform . Dun and Bradstreet will provide a DUNS number by telephone at no charge. If the DUNS number is not on the Cover Sheet, you can add it when you submit the proposal.

If your organization is a profit-making entity, you must certify this status by checking each of the organization type boxes that apply. The options and the guidelines for each are as follows:

- **For Profit**
  A U.S. commercial organization, especially small business with strong capabilities in scientific or engineering research or education
- **Small Business**

For profit, privately owned, no more than 500 employees, and not dominant in its field (Check this box also when the proposal involves a cooperative effort between an academic organization and a small business.)

- **Minority Business**
  At least 51% owned by one or more minority or disadvantaged individuals (If a publicly owned business, at least one or more minority or disadvantaged individuals must own 51% of the voting stock. One or more such individuals must also control the management and daily business operations.)
- **Woman-Owned Business**
  At least 51% owned by a woman or women who also control it and operate it

See also:

- Proposal Title
- Budget and Duration Information
- Announcement and Consideration
- Co-PI Information
- Previous NSF Awards
- Other Federal Agencies
- Other Information

Other Information

1. Access the **Remainder of the Cover Sheet** screen (see Access the Remainder of the Cover Sheet Screen).

Figure 1 Remainder of the Cover Sheet screen. The Other Information link is circled.

2. Click **Other Information** (Figure 1). The **Other Information** section displays (Figure 2).

Other Information

Check Appropriate Box(es) if this proposal includes any of the items listed below:

- [x] Beginning Investigator (PAPPG II.D.2)
- [ ] Disclosure of Lobbying Activities (PAPPG II.D.1)
- [ ] Proprietary & Privileged Information (PAPPG II.C.1.c & II.D.1)
- [ ] Historic Places (PAPPG II.C.2.j)
- [ ] Vertebrate Animals (PAPPG II.E.8)
  - IACUC App. Date (MM/DD/YY)
  - PHS Animal Welfare Assurance Number
- [ ] Human Subjects (PAPPG II.D.4)
  - Exemption Subsection
  - IRB App. Date (MM/DD/YY)
  - Human Subjects Assurance Number
- [x] International Activities Country Name (PAPPG II.C.2.j)

Country 1. Australia Country 2. Country 3.
Country 4. Country 5.

Type of Proposal (select one)
GOALI

- [x] This proposal is being submitted under the Special Exception to the Deadline Date Policy (see PAPPG I.F)

Collaborative Status (select one)
- ( ) A collaborative proposal from one organization (PAPPG II.E.6.a)
- ( ) A collaborative proposal from multiple organizations (PAPPG II.E.6.b)
- (•) Not a collaborative proposal

Figure 2 Other Information section of the Remainder of the Cover Sheet screen.

3. 1. Check the appropriate boxes (Figure 2), if the proposal includes any of the items of Other Information. See the *Proposal & Award Policies & Procedures Guide (PAPPG)* chapter and section noted at the end of each item line for more information. The categories of Other Information are:
   - Beginning Investigator
   - Disclosure of Lobbying Activities (see "Disclosing Lobbying Activities")
   - Proprietary and Privileged Information
   - Historic Places
   - Vertebrate Animals with IACUC App. Date or PHS Animal Welfare Assurance Number.(PAPPG Chapter II.D.4)
   - Human Subjects with Exemption Subsection, IRB App. Date or Human Subjects Assurance Number. (PAPPG Chapter II.D.5)
   - International Activities Country Name (select countries involved) in the boxes (Figure 2)

See also:

- Proposal Title
- Budget and Duration Information
- Announcement and Consideration
- Co-PI Information
- Previous NSF Awards
- Other Federal Agencies
- Awardee Organization

Table of Contents

FastLane automatically generates the Table of Contents for you. You cannot edit the Table of Contents.

1. Access the **Form Preparation** screen (Figure 1) (see Create a New Proposal, or Edit a Proposal).

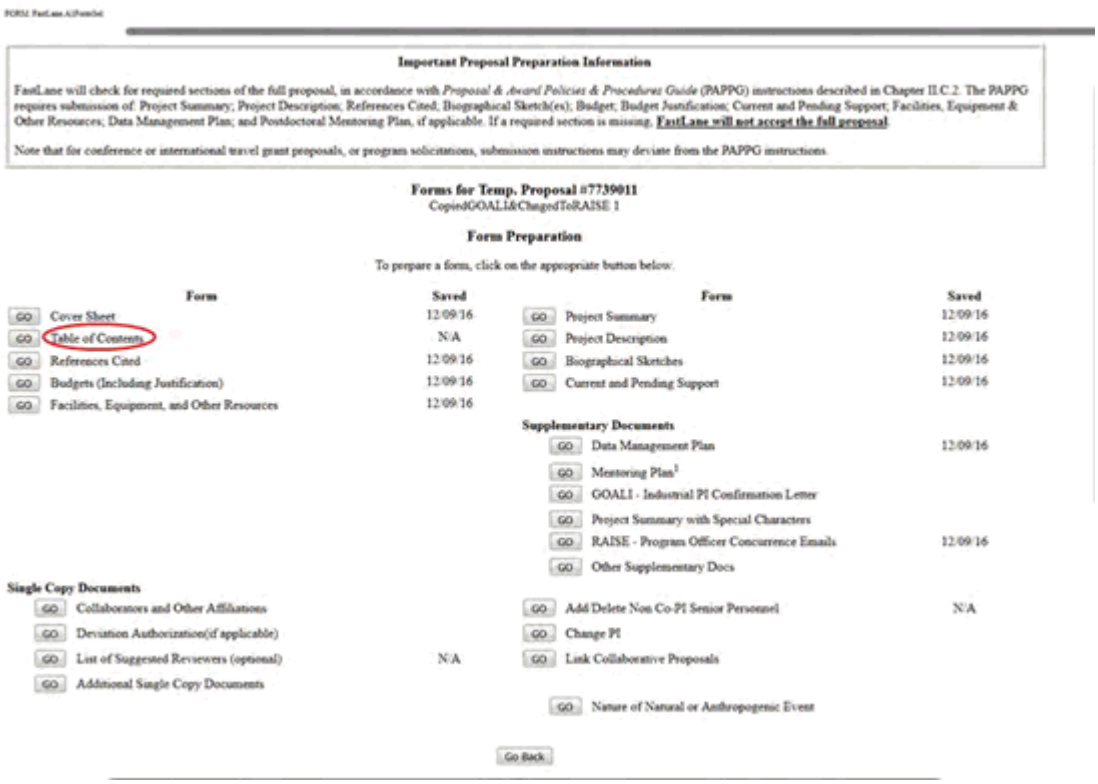


Figure 1 Form Preparation screen. The Go button for Table of Contents is circled.

2. Click the **Go** button for the **Table of Contents** (Figure 1). The **Table of Contents** screen displays (Figure 2).

Table Of Contents

	Total No. of Pages
Cover Sheet for Proposal to the National Science Foundation	
Project Summary (not to exceed 1 page)	1
Table of Contents	1
Project Description (Including Results from Prior NSF Support) (not to exceed 15 pages) (Exceed only if allowed by a specific program announcement/solicitation or if approved in advance by the appropriate NSF Assistant Director or designee)	0
References Cited	0
Biographical Sketches (Not to exceed 2 pages each)	0
Budget (Plus up to 3 pages of budget justification)	0
Current and Pending Support	0
Facilities, Equipment and Other Resources	0
Special Information/Supplementary Documents (Data Management Plan, Mentoring Plan and Other Supplementary Documents)	0
Appendix (List Below)(Include only if allowed by a specific program announcement/ solicitation or if approved in advance by the appropriate NSF Assistant Director or designee)	

Go Back

Figure 2 Table of Contents screen. This is a view-only form.

See also:

- Cover Sheet
- References Cited
- Budgets (Including Justification)
- Facilities, Equipment, and Other Resources
- Deviation Authorization
- List of Suggested Reviewers
- Additional Single Copy Documents
- Project Summary
- Project Description
- Biographical Sketches
- Current and Pending Support
- Supplementary Docs
- Add/Delete Non-Co-PI Senior Personnel
- Change PI
- Link Collaborative Proposals
- Proposal Classification Form

References Cited

What Are References Cited?

References Cited is a listing of thereferences that you want to cite for a proposal. You may only include bibliographic citations and may not add parenthetical information outside of the 15-page Project Description. See PAPPGChapter II.C.2.e for further information.

Work on References Cited

1. Access the **Form Preparation** screen (Figure 1) (see Create a New Proposal or Edit a Proposal)

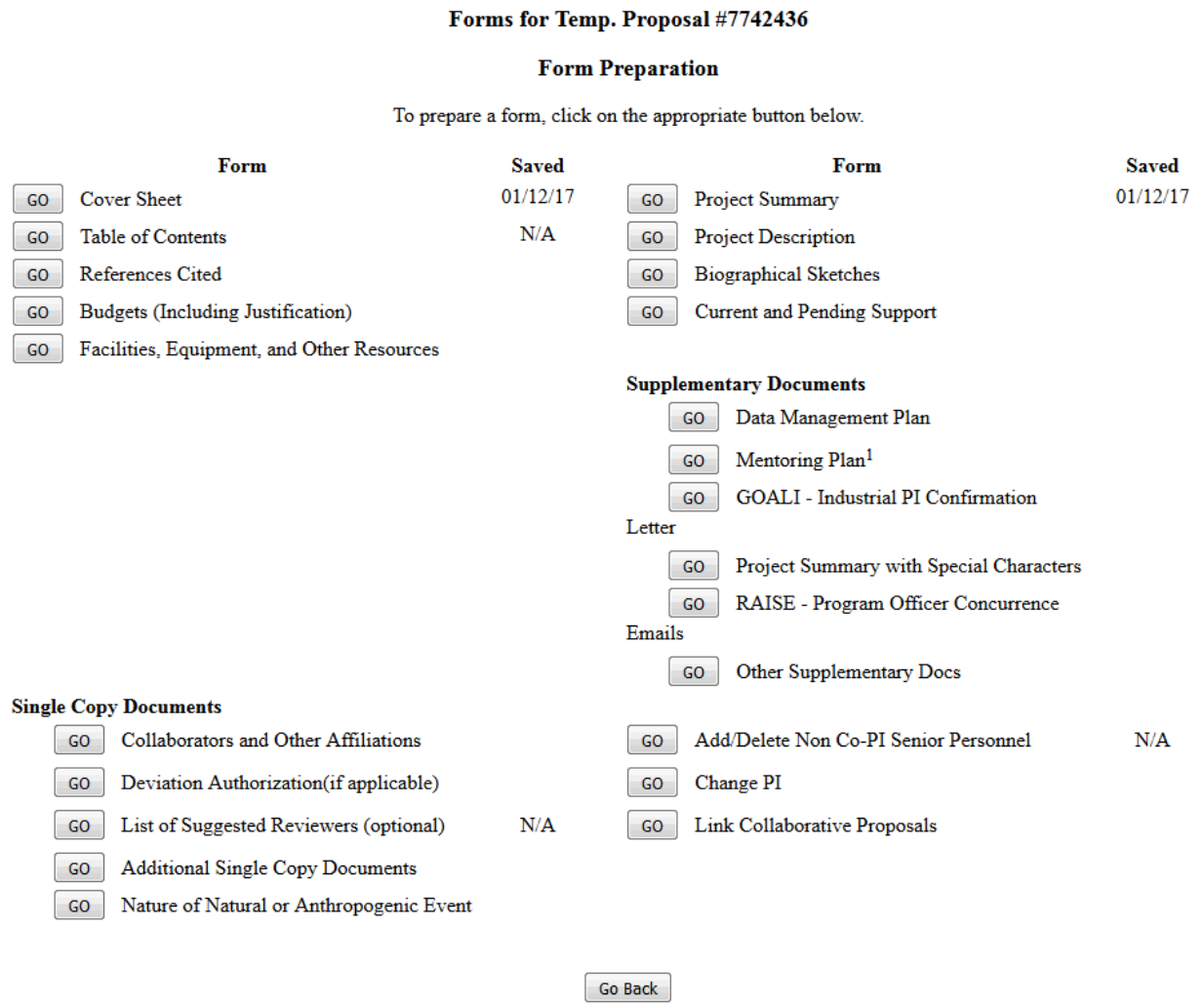


Figure 1 Form Preparation screen. The Go button for References Cited is circled.

2. Click the **Go** button for References Cited (Figure 1). The **References Cited** screen displays (Figure 2).

Figure 2 References Cited screen.

You have these options:

- Enter References Cited in the text box
- Upload References Cited

See also:

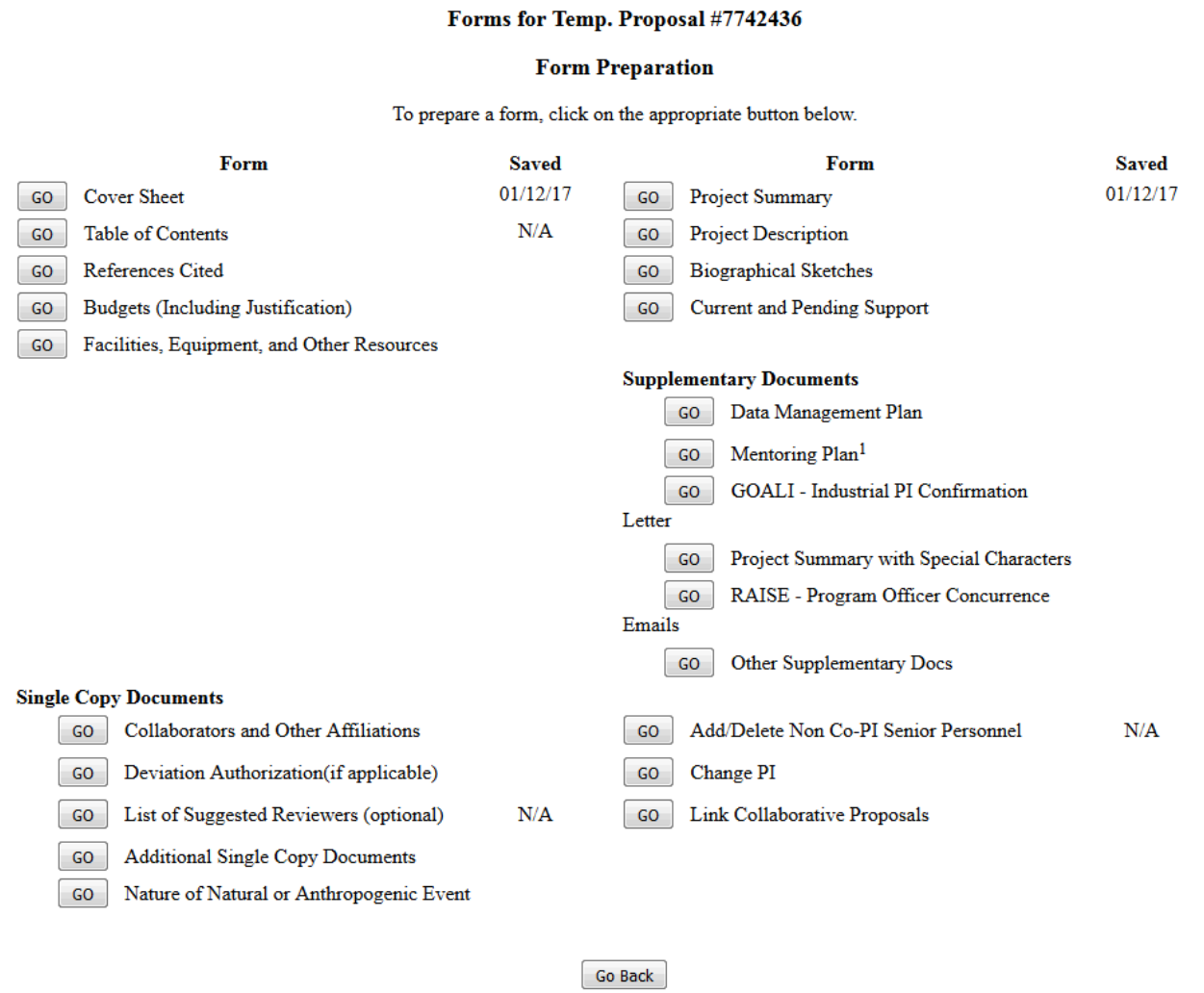
- Cover Sheet
- Table of Contents
- Budgets (Including Justification)
- Facilities, Equipment, and Other Resources
- Deviation Authorization
- List of Suggested Reviewers
- Additional Single Copy Documents
- Project Summary
- Project Description
- Biographical Sketches
- Current and Pending Support
- Supplementary Docs
- Add/Delete Non-Co-PI Senior Personnel
- Change PI
- Link Collaborative Proposals
- Proposal Classification Form

What Are References Cited?

References Cited is a listing of thereferences that you want to cite for a proposal. You may only include bibliographic citations and may not add parenthetical information outside of the 15-page Project Description. See PAPPGChapter II.C.2.e for further information.

Work on References Cited

1. Access the **Form Preparation** screen (Figure 1) (see Create a New Proposal or Edit a Proposal)



Forms for Temp. Proposal #7742436

Form Preparation

To prepare a form, click on the appropriate button below.

Form	Saved	Form	Saved
GO Cover Sheet	01/12/17	GO Project Summary	01/12/17
GO Table of Contents	N/A	GO Project Description	
GO References Cited		GO Biographical Sketches	
GO Budgets (Including Justification)		GO Current and Pending Support	
GO Facilities, Equipment, and Other Resources			

Supplementary Documents

GO Data Management Plan

GO Mentoring Plan[1]

GO GOALI - Industrial PI Confirmation Letter

GO Project Summary with Special Characters

GO RAISE - Program Officer Concurrence Emails

GO Other Supplementary Docs

Single Copy Documents

GO Collaborators and Other Affiliations		GO Add/Delete Non Co-PI Senior Personnel	N/A
GO Deviation Authorization(if applicable)		GO Change PI	
GO List of Suggested Reviewers (optional)	N/A	GO Link Collaborative Proposals	
GO Additional Single Copy Documents			
GO Nature of Natural or Anthropogenic Event			

Go Back

Figure 1 Form Preparation screen. The Go button for References Cited is circled.

2. Click the **Go** button for References Cited (Figure 1). The **References Cited** screen displays (Figure 2).

Figure 2 References Cited screen.

You have these options:

- Enter References Cited in the text box
- Upload References Cited

See also:

- Cover Sheet
- Table of Contents
- Budgets (Including Justification)
- Facilities, Equipment, and Other Resources
- Deviation Authorization
- List of Suggested Reviewers
- Additional Single Copy Documents
- Project Summary
- Project Description
- Biographical Sketches
- Current and Pending Support
- Supplementary Docs
- Add/Delete Non-Co-PI Senior Personnel
- Change PI
- Link Collaborative Proposals
- Proposal Classification Form

Enter References Cited in the Text Box

1. Access the **References Cited** screen (Figure 1) (see Work on References Cited).

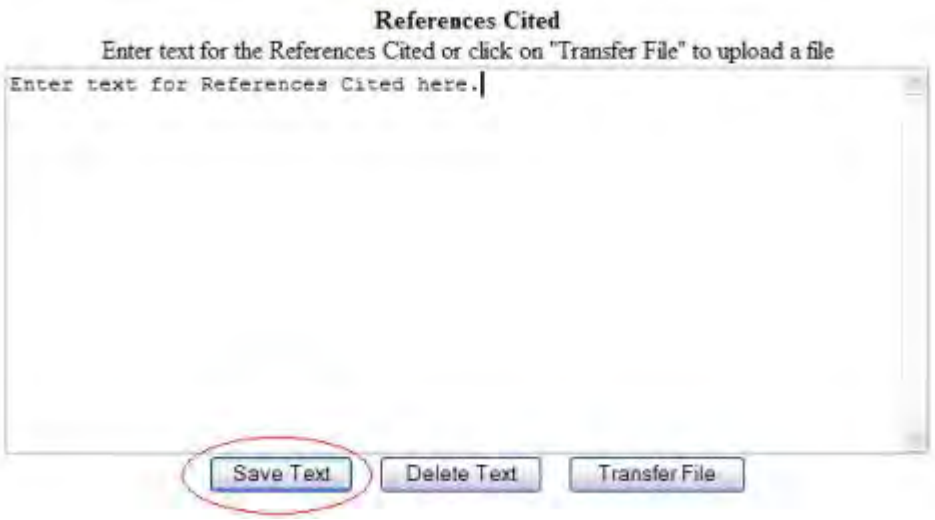


Figure 1 References Cited screen. The Save Text button is circled.

2. Type in or copy and paste the References Cited in the text box (Figure 1).
3. Click the **Save Text** button (Figure 1). A screen displays (Figure 2) with the confirmation message that the References Cited data is saved.

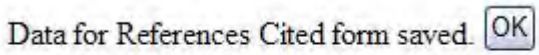


Figure 2 Screen with the message that the References Cited text is saved.

4. Click the **OK** button (Figure 2). The **Form Preparation** screen displays.

Upload References Cited

1. Access the **References Cited** screen (Figure 1) (see Work on References Cited).

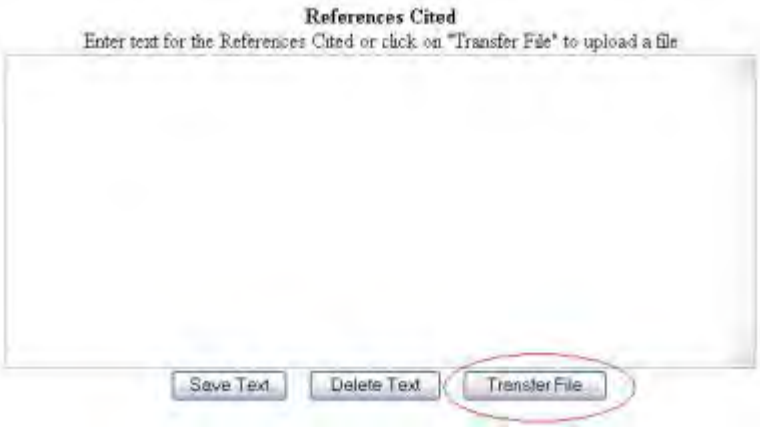


Figure 1 References Cited screen. The Transfer File button is circled.

2. Click the **Transfer File** button (Figure 1). The **References Cited File Upload** screen displays (Figure 2). See Upload a File for directions.

Figure 2 References Cited File Upload screen.

If References Cited have already been uploaded, when you click the **Go** button for References Cited on the **Form Preparation** screen, the **References Cited File Upload** screen displays (Figure 3) with these options:

- Display Current References Cited
- Delete Current References Cited
- Upload a New References Cited (This option automatically replaces the already uploaded file.)

Figure 3 References Cited File Upload screen if a file has already been uploaded.

Display Current References Cited

Click the **Display Current References Cited** button (Figure 3). The previously uploaded References Cited displays in PDF format. If you need to download Adobe Reader, see Adobe Reader for FastLane.

Delete Current References Cited

1. Click the **Delete Current References Cited** button (Figure 3). A screen displays with a message for you to confirm that you want to delete the file.
2. Click the **OK** button. The **Form Preparation** screen displays.

Upload a New References Cited

Follow the directions in Upload a File. Uploading a new References Cited document automatically replaces the previously uploaded file.

Enter a New References Cited in the Text Box

If a References Cited has already been uploaded and you want to enter a new References Cited in the text box, do the following:

1. Click the **Delete Current References Cited** button (Figure 3). A screen displays with a message for you to confirm that you want to delete the file.
2. Click the **OK** button. The **References Cited File Upload** screen displays (Figure 2).
3. Return to the **Form Preparation** screen.
4. Click the **Go** button for References Cited. The **References Cited** screen displays with the text box (Figure 1). See Enter References Cited in the Text Box for instructions.

Budgets (Including Justification)

What Are Budgets (Including Justification)?

A proposal must have a budget for each year that you are requesting NSF support. It must also have a cumulative budget for the full term of supportyou request from NSF.
See the Proposal & Award Policies & Procedures Guide (PAPPG) Chapter II.C.2.g for details including information on the various budget categories.

You must also justify the proposed budget in the Budgets (Including Justification) component.

The Budget Justification is limited to three pages per proposal.

In the Budgets (Including Justification) component you can do the following:
- Add a year for which you will submit a yearly budget
- Enter the budget data for a year, either online or on a downloaded spreadsheet
- Justify the budget
- Copy a budget from one year for another year
- Edit a budget
- Add or change your organization's personnel for whom you are requesting funds

You can add a sub recipient organization for the proposal and do the following for that organization:
- Add a year for which you will submit a yearly budget for that organization
- Create a budget for that organization
- Copy a budget from one year for another year for that organization
- Justify that organization's budget
- Change the PI for that organization
- Change the sub recipient organization, and transfer the personnel and budget from the old organization to the new

You can also:
- Add or delete personnel for whom you are requesting funds for any organization
- Delete a budget year for any organization
- Delete a sub recipient organization

(Click on a link above for the instructions for that function.)

To begin working on Budgets (Including Justification), see Create a Budget for instructions.

Note: The sub recipient organization can access the budget either through the proposal PIN, a Co-PI at the sub recipient organization, or circulation of the budget as a spreadsheet.

See also:
- Cover Sheet
- Table of Contents
- References Cited
- Facilities, Equipment, and Other Resources
- Deviation Authorization
- List of Suggested Reviewers
- Additional Single Copy Documents
- Project Summary

- Project Description
- Biographical Sketches
- Current and Pending Support
- Supplementary Docs
- Add/Delete Non-Co-PI Senior Personnel
- Change PI
- Link Collaborative Proposals
- Proposal Classification Form

What Are Budgets (Including Justification)?

A proposal must have a budget for each year that you are requesting NSF support. It must also have a cumulative budget for the full term of supportyou request from NSF.
See the Proposal & Award Policies & Procedures Guide (PAPPG) Chapter II.C.2.g for details including information on the various budget categories.

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- Add a year for which you will submit a yearly budget for that organization
- Create a budget for that organization
- Copy a budget from one year for another year for that organization
- Justify that organization's budget
- Change the PI for that organization
- Change the sub recipient organization, and transfer the personnel and budget from the old organization to the new

You can also:
- Add or delete personnel for whom you are requesting funds for any organization
- Delete a budget year for any organization
- Delete a sub recipient organization

(Click on a link above for the instructions for that function.)

To begin working on Budgets (Including Justification), see Create a Budget for instructions.

Note: The sub recipient organization can access the budget either through the proposal PIN, a Co-PI at the sub recipient organization, or circulation of the budget as a spreadsheet.

See also:
- Cover Sheet
- Table of Contents

- References Cited
- Facilities, Equipment, and Other Resources
- Deviation Authorization
- List of Suggested Reviewers
- Additional Single Copy Documents
- Project Summary
- Project Description
- Biographical Sketches
- Current and Pending Support
- Supplementary Docs
- Add/Delete Non-Co-PI Senior Personnel
- Change PI
- Link Collaborative Proposals
- Proposal Classification Form

What Is the Budget Year Form?

The yearly budget form presents the sections for information that are listed below. In no section are you required to supply information.

Senior Personnel

Supply the following for each Senior Person:
- Title
- Number of calendar months working on the project
- Number of academic months working on the project
- Number of summer months working on the project
- Total funds you are requesting for that individual

Other Personnel

List the number of personnel under the following categories:
- Postdoctoral Scholars
- Other Professionals
- Graduate Students
- Undergraduate Students
- Secretarial and Clerical
- Other

For the Postdoctoral Scholars and Other Professionals, enter:
- Number of calendar months working on the project
- Number of academic months working on the project
- Number of summer months working on the project

Enter the total funds you are requesting for each category.

Fringe Benefits

Enter any funds you are requesting for fringe benefits.

Equipment

List each piece of equipment costing more than $5,000 that you propose to use for the project and the total funds you are requesting for each piece of equipment you list.

Travel

Enter the funds you are requesting for any travel you propose for the project in these categories:

- Domestic travel (United States, Canada, Mexico, and U.S. Possessions)
- International travel

Participant Support Costs

List the total participant costs by:

- Stipend
- Travel
- Subsistence
- Other

Enter the number of participants.

Other Direct Costs

Enter the amount of funds requested in any of these categories:

- Materials and supplies
- Publication costs/documentation/dissemination
- Consultant services
- Computer services
- Subawards
- Other

Indirect Costs

Enter the following for indirect costs:

- Item
- Rate as a percentage
- Base amount in dollars

Residual Funds

Enter the total amount of residual funds. If you are requesting further support for a current project, see the *Proposal & Award Policies &Procedures Guide Chapter VI.E.2*.

Cost Sharing

Inclusion of voluntary committed cost sharing is prohibited and, in almost all cases, Line M on the proposal budget will not be available for use by the proposer.

Mandatory cost sharing will only be required for NSF programs when explicitly authorized by legislation, the National Science Board, or the NSF Director. In those rare instances, cost sharing requirements will be clearly identified in the solicitation and must be included on Line M of the proposal budget. Proposers are advised not to exceed the mandatory cost sharing level or amount specified in the solicitation.

Consult *Proposal & Award Policies & Procedures Guide (PAPPG) Chapter II.C.2.g.xii* for a full description.
See Create a Budget.

Create a Budget

Create a Budget

1. Access the **Form Preparation** screen (Figure 1) (see Create a New Proposal, Edit a Proposal, or Create a New Proposal from a Template).

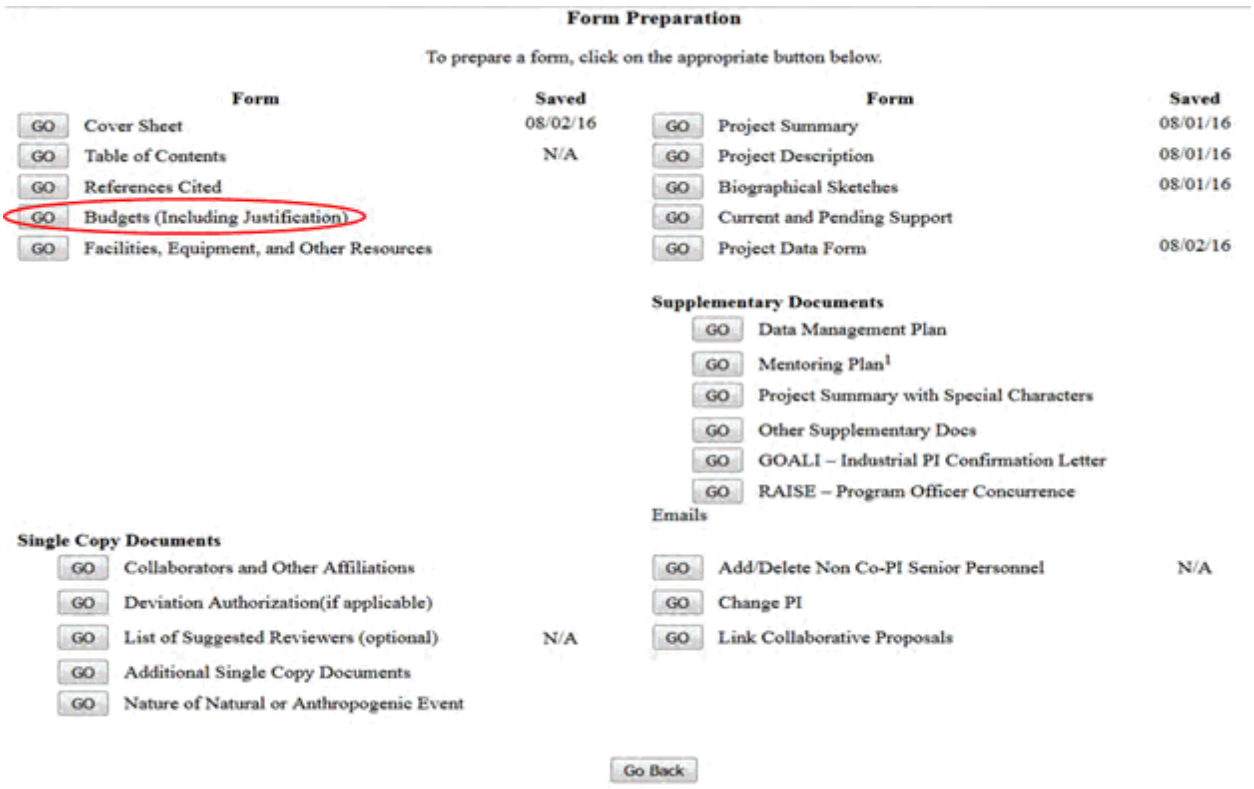


Figure 1 Form Preparation screen. The Go button for Budgets (Including Justification) is circled.

2. Click the **Go** button for Budgets (Including Justification) (Figure 1). The **Project Budget** screen displays (Figure 2). The **Project Budget** screen is the gateway for creating a

budget for your organization or for a partnering organization for the proposal. There are three steps for creating a budget:

- Step 1 Add a year for which you will create the budget
- Step 2 Enter the budget data—either in the online form or offline in an Excel spreadsheet
- Step 3 Justify the budget

Click on a link above for instructions for that step.

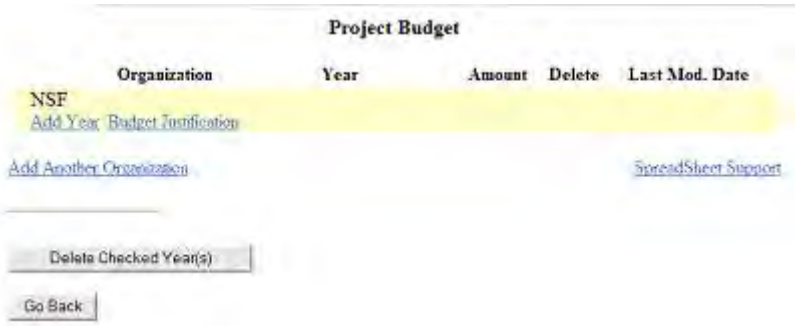


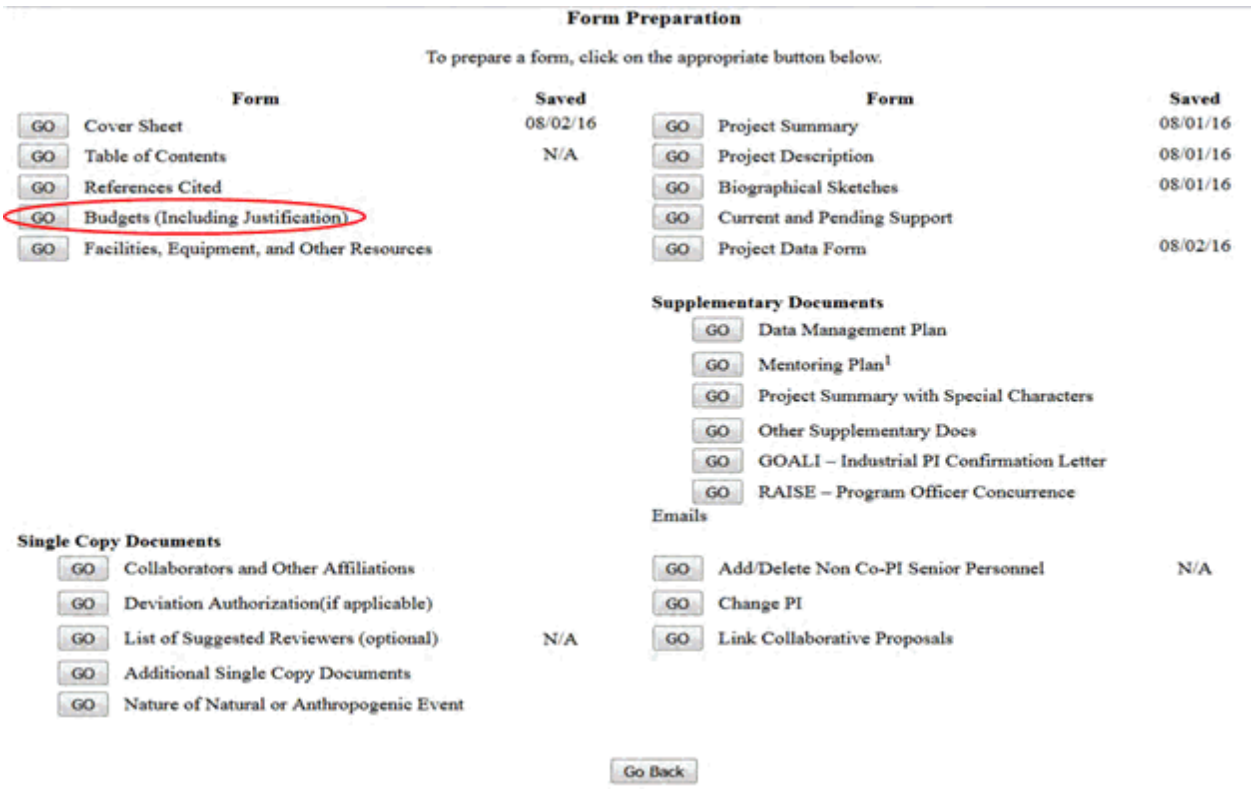
Figure 2 Project Budget screen.

See also:

- Copy a Budget from One Year for Another Year
- Edit a Budget
- Add or Delete Senior Personnel
- Delete a Budget Year
- Work on a Budget for a Sub recipient Organization

Create a Budget

1. Access the **Form Preparation** screen (Figure 1) (see Create a New Proposal, Edit a Proposal, or Create a New Proposal from a Template).



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   - Step 1 Add a year for which you will create the budget
   - Step 2 Enter the budget data—either in the online form or offline in an Excel spreadsheet
   - Step 3 Justify the budget

   Click on a link above for instructions for that step.

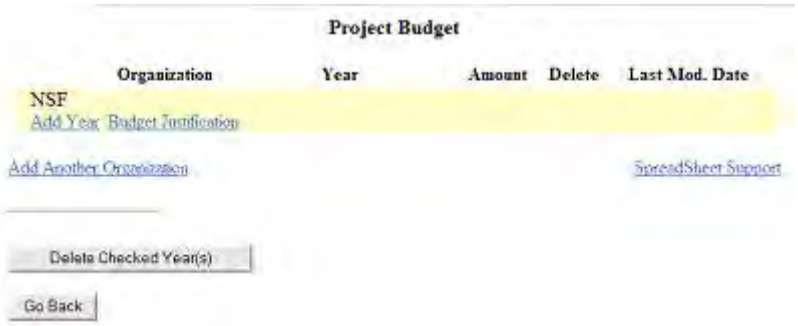


Figure 2 Project Budget screen.

See also:

- Copy a Budget from One Year for Another Year
- Edit a Budget
- Add or Delete Senior Personnel
- Delete a Budget Year
- Work on a Budget for a Sub recipient Organization

Step 1 Add a Year

1. Access the **Project Budget** screen (Figure1) (see Create a Budget).

Figure 1 Project Budget screen. The Add Year link is circled.

2. Click **Add Year** under the name of your organization (Figure 1). The **Budget Year Add** screen displays (Figure 2) for your organization.

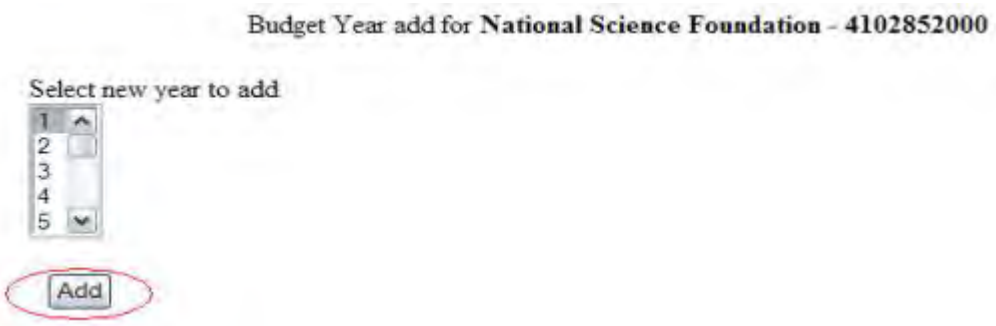


Figure 2 Budget Year Add screen. The Add button is circled.

3. Highlight a year to add from the **Select New Year to Add** drop-down list (Figure 2).
4. Click the **Add** button (Figure 2). The **Project Budget** screen displays (Figure 3) with the year listed in the **Year** column for your organization. The screen also displays **Funds** and **Personnel** links for that budget year. Now you are ready to enter the budget data for that year.

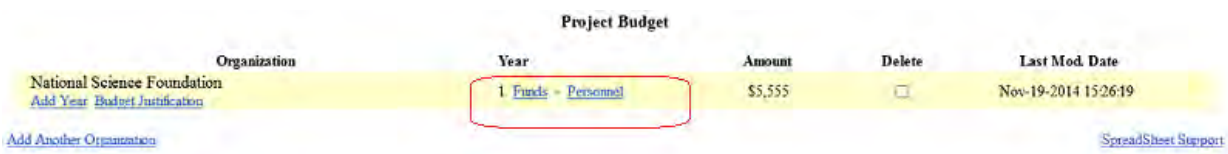


Figure 3 Project Budget screen with Year 1 added for creating a budget. The Funds link and the Personnel link are circled.

See also:

- Step 2 Enter the budget data
- Step 3 Justify the budget

Step 2 Enter Budget Data

Step 2 Enter the Budget Data

1. Access the **Project Budget** screen (Figure 1) (see Create a Budget).

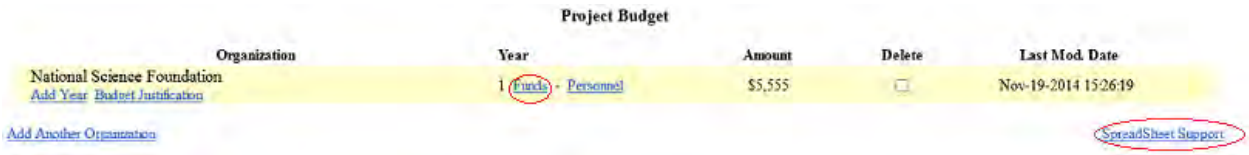


Figure 1 Project Budget screen. The Funds link and the Spreadsheet Support link are circled.

2. Complete Step 1 Add a Year. Now you are ready to enter the budget data. You have these options for entering the budget data:
   - On the **Project Budget** screen (Figure 1), click **Spreadsheet Support** to complete the budget offline.
   - On the **Project Budget** screen (Figure 1), click **Funds** on the line for that budget year to enter the budget data online.

Step 2 Enter the Budget Data

1. Access the **Project Budget** screen (Figure 1) (see Create a Budget).

Figure 1 Project Budget screen. The Funds link and the Spreadsheet Support link are circled.

2. Complete Step 1 Add a Year. Now you are ready to enter the budget data. You have these options for entering the budget data:
   - On the **Project Budget** screen (Figure 1), click **Spreadsheet Support** to complete the budget offline.
   - On the **Project Budget** screen (Figure 1), click **Funds** on the line for that budget year to enter the budget data online.

Complete the Budget Offline

1. Access the **Project Budget** screen (Figure 1) (see Step 2 Enter the Budget Data).

Figure 1 Project Budget screen. The Spreadsheet Support link is circled.

2. Click **Spreadsheet Support** (Figure 1). The **Spreadsheet Support Select Organization** screen displays (Figure 2).

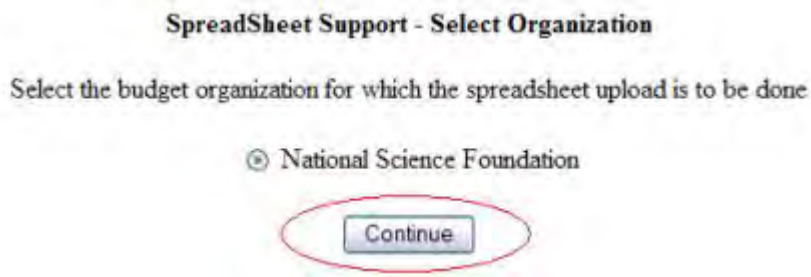


Figure 2 Spreadsheet Support Select Organization screen. The Continue button is circled.

3. Click the radio button for the organization for which you are creating the budget (Figure 2).
4. Click the **Continue** button (Figure 2). The **Spreadsheet Support** screen displays (Figure 3).

Figure 3 Spreadsheet Support screen. The Download link and the Upload link are circled.

5. Click the **Download** button to download the Spreadsheet template (Figure 3).
6. Save the Excel spreadsheet to your computer with a new name.
7. Enter the budget data into the Excel spreadsheet offline using the instructions accompanying the template.
8. When finished, on the **Spreadsheet Support** screen (Figure 3), upload the completed spreadsheet to FastLane. See Upload a File.

Enter Budget Data Online

Enter the Budget Data Online

1. Access the **Project Budget** screen (Figure 1) (see Step 2 Enter the Budget Data).

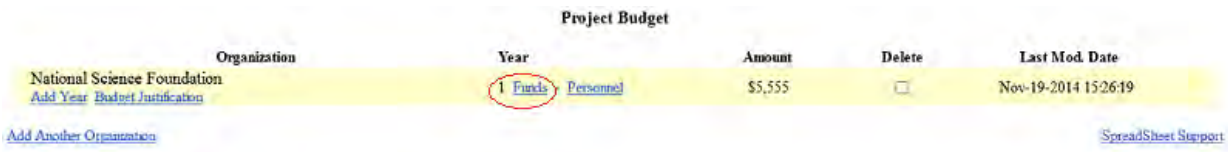


Figure 1 Project Budget screen with the Funds link circled.

2. Click **Funds** on the line for the year for which you want to create a budget (Figure 1). The **Budget Year** screen displays (Figure 2).

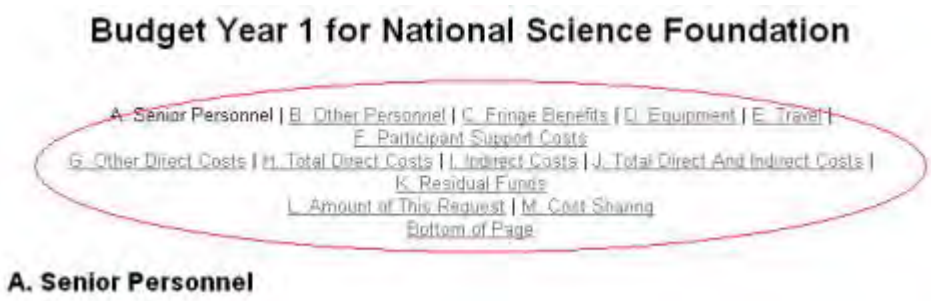


Figure 2 Upper portion of the Budget Year screen with the navigating links for the Budget sections.

Navigate the Budget Year Screen

- The top of the **Budget Year** screen has links to all sections of the budget. To navigate the **Budget Year** screen (Figure 2), click on any of the links to sections that you want to view or work on:
  - Senior Personnel
  - Other Personnel
  - Fringe Benefits
  - Equipment
  - Travel
  - Participant Support Costs

- Other Direct Costs
- Indirect Costs
- Cost Sharing

(Click on a link above for instructions on how to complete that section of the **Budget Year** screen.)

- In each section, you can click the **Calculate** button (Figure 3), and FastLane will calculate the totals for that section.

Figure 3 Calculate button, for example, in the Participant Support Costs section of the Budget Year screen.

- Click the **Calculate and Save** button often at the bottom of the screen (Figure 4), to save the data as you work through the different sections of the **Budget Year** screen.

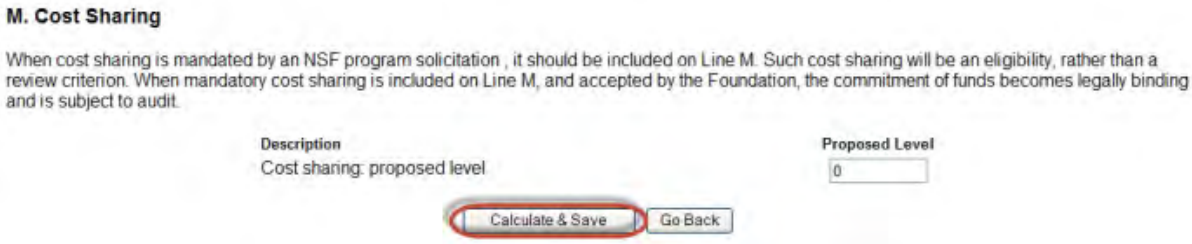


Figure 4 Calculate and Save button at the bottom of the Budget Year screen.

See also Save and Calculate the Budget.

Enter the Budget Data Online

1. Access the **Project Budget** screen (Figure 1) (see Step 2 Enter the Budget Data).

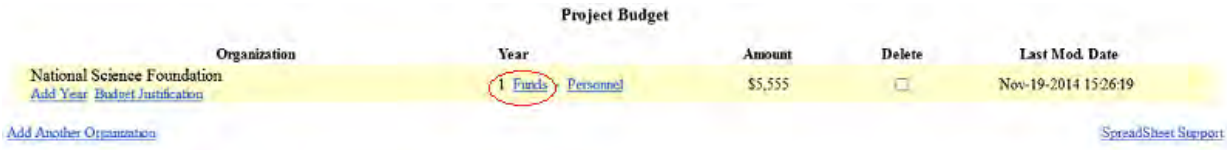


Figure 1 Project Budget screen with the Funds link circled.

2. Click **Funds** on the line for the year for which you want to create a budget (Figure 1). The **Budget Year** screen displays (Figure 2).

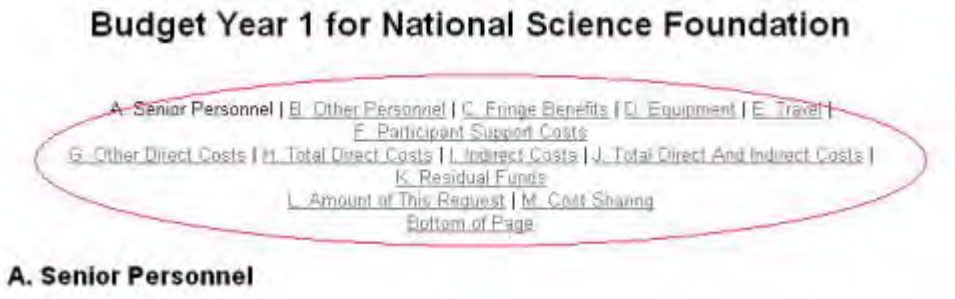


Figure 2 Upper portion of the Budget Year screen with the navigating links for the Budget sections.

Navigate the Budget Year Screen

- The top of the **Budget Year** screen has links to all sections of the budget. To navigate the **Budget Year** screen (Figure 2), click on any of the links to sections that you want to view or work on:
  - Senior Personnel
  - Other Personnel
  - Fringe Benefits
  - Equipment
  - Travel
  - Participant Support Costs
  - Other Direct Costs
  - Indirect Costs
  - Cost Sharing

  (Click on a link above for instructions on how to complete that section of the **Budget Year** screen.)

- In each section, you can click the **Calculate** button (Figure 3), and FastLane will calculate the totals for that section.

Figure 3 Calculate button, for example, in the Participant Support Costs section of the Budget Year screen.

- Click the **Calculate and Save** button often at the bottom of the screen (Figure 4), to save the data as you work through the different sections of the **Budget Year** screen.

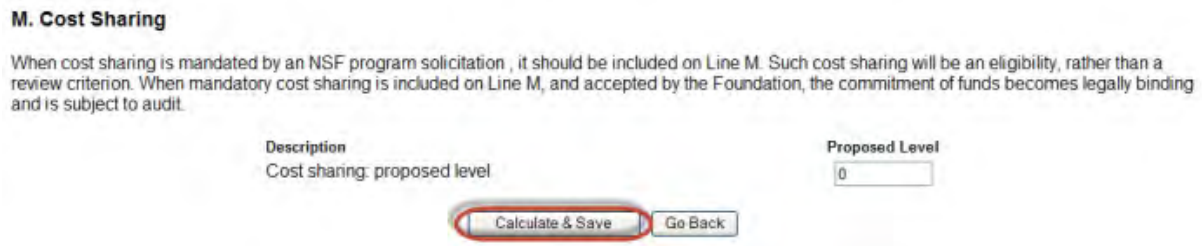


Figure 4 Calculate and Save button at the bottom of the Budget Year screen.

See also Save and Calculate the Budget.

Senior Personnel

1. Access the **Budget Year** screen (Figure 1) (see Enter the Budget Data Online).

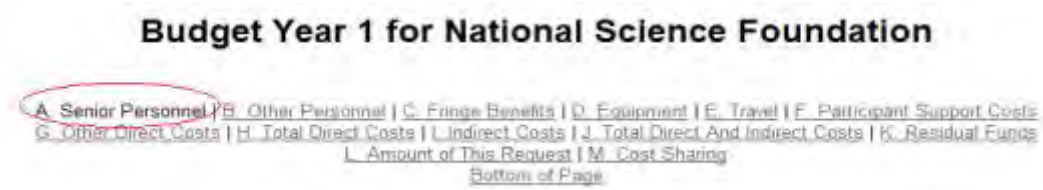


Figure 1 Budget Year screen. The Senior Personnel link is circled.

2. Click **Senior Personnel** (Figure 1). The **Senior Personnel** section of the **Budget Year** screen displays (Figure 2) with a listing of the Senior Personnel assigned to the proposal.

Figure 2 Senior Personnel section of the Budget Year screen.

3. For each individual listed (Figure 2), enter the following:
   - In the **Title** box, type the individual's title.

- In the **Calendar Months** box, type the number of calendar months the person will work on the project.
- In the **Academic Months** box, type the number of academic months the person will work on the project.
- In the **Summer Months** box, type the number of summer months the person will work on the project.
- In the **Funds Requested by the Proposer** box, type the amount of funds requested for the individual (no dollar signs, no commas).

4. When you have finished typing the information for all senior personnel, click the **Calculate** button (Figure 2) to calculate the total amount you are requesting for all senior personnel listed.

All fields are optional.

*If you need to add or delete personnel to the **Senior Persons** list,* click the **Add/Remove Senior Personnel** button (Figure 2). The **Budget Personnel** screen displays (Figure 3). See Add a Senior Person or Delete a Senior Person for instructions on adding or removing a senior person.

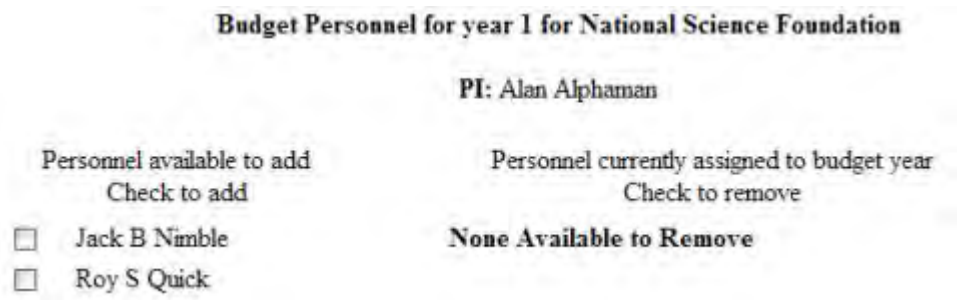


Figure 3 Budget Personnel screen.

See also:

- Senior Personnel
- Other Personnel
- Fringe Benefits
- Equipment
- Travel
- Participant Support Costs
- Other Direct Costs
- Indirect Costs
- Cost Sharing
- Save and calculate the budget

Other Personnel

1. Access the **Budget Year** screen (Figure 1) (see Enter the Budget Data Online).

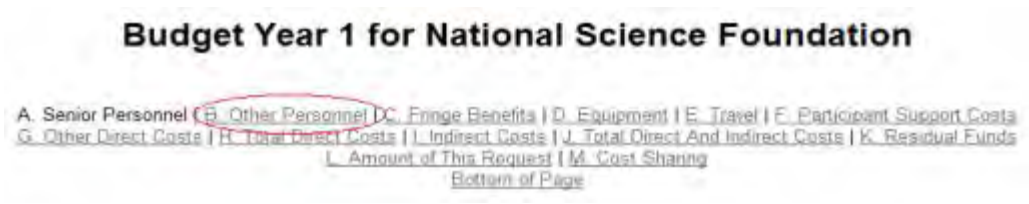
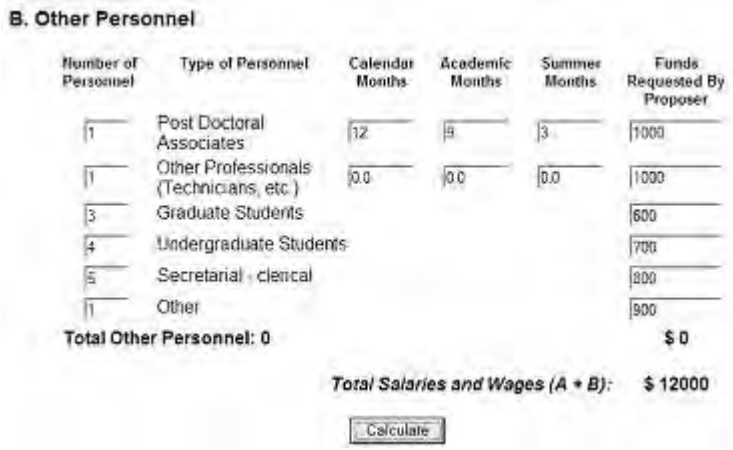


Figure 1 Budget Year screen. The Other Personnel link is circled.

2. Click **Other Personnel** (Figure 1). The **Other Personnel** section of the **Budget Year** screen displays (Figure 1).



B. Other Personnel

Number of Personnel	Type of Personnel	Calendar Months	Academic Months	Summer Months	Funds Requested By Proposer
1	Post Doctoral Associates	12	9	3	1000
1	Other Professionals (Technicians, etc.)	0.0	0.0	0.0	1000
3	Graduate Students				600
4	Undergraduate Students				700
5	Secretarial - clerical				800
1	Other				900

Total Other Personnel: 0 $ 0

Total Salaries and Wages (A + B): $ 12000

Calculate

Figure 2 Other Personnel section of the Budget Year screen.

3. For each category of **Type of Personnel** (Figure 2), enter the following:
   - In the **Number of Personnel** box, type the number of personnel in that category.
   - In the **Calendar Months** box, type the number of calendar months the person will work on the project.
   - In the **Academic Months** box, type the number of academic months the person will work on the project.
   - In the **Summer Months** box, type the number of summer months the person will work on the project
   - In the **Funds Requested by the Proposer** box, type the amount of funds requested for the individual (no dollar signs, no commas).

   Consistent with 2 CFR § 200.413, the salaries of administrative and clerical staff should normally be treated as indirect (F&A) costs. Inclusion of such costs on a proposal budget may be appropriate only if all of the following conditions are met:
   (a) Administrative or clerical services are integral to a project or activity.
   (b) Individuals involved can be specifically identified with the project or activity.
   (c) Such costs are explicitly included in the approved budget or have the prior written approval of the cognizant NSF Grants Officer; and
   (d) The costs are not also recovered as indirect costs.
4. When you have finished typing the information for all types of other personnel, click the **Calculate** button (Figure 2) to calculate the total amount you are requesting for all other personnel.

All fields are optional.

See also:

- Senior Personnel
- Other Personnel
- Fringe Benefits
- Equipment
- Travel
- Participant Support Costs
- Other Direct Costs
- Indirect Costs
- Cost Sharing
- Save and calculate the budget

Fringe Benefits

1. Access the **Budget Year** screen (Figure 1) (see Enter the Budget Data Online).

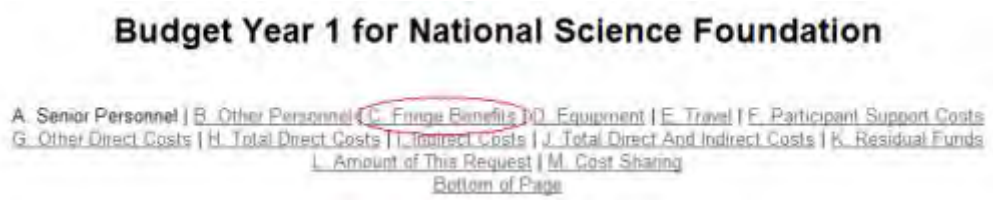


Figure 1 Budget Year screen. The Fringe Benefits link is circled.

2. Click **Fringe Benefits** (Figure 1). The **Fringe Benefits** section of the **Budget Year** screen displays (Figure 2).

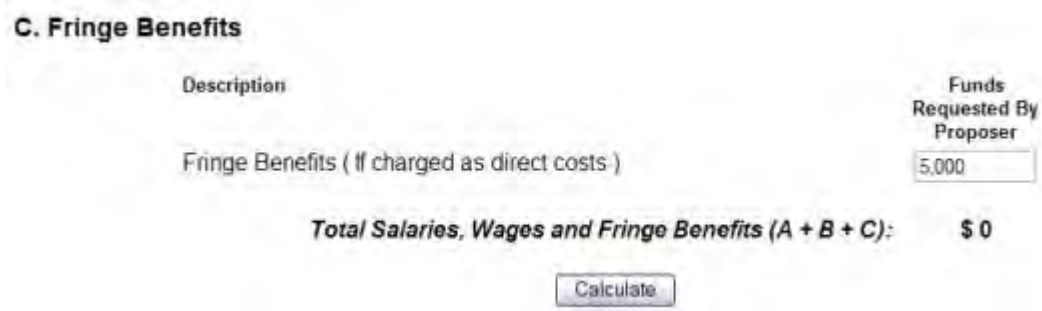


Figure 2 Fringe Benefits section of the Budget Year screen.

3. In the **Funds Requested by Proposer** box (Figure 2), type the amount of funds you are requesting for fringe benefits (no dollar signs, no commas). See 2 CFR § 200.431 for the definition and allowability of inclusion of fringe benefits on a proposal budget.
4. Click the **Calculate** button (Figure 2) to total the amount of total salaries, wages, and fringe benefits you are requesting.

See also:

- Senior Personnel

- Other Personnel
- Fringe Benefits
- Equipment
- Travel
- Participant Support Costs
- Other Direct Costs
- Indirect Costs
- Cost Sharing
- Save and calculate the budget

Equipment

1. Access the **Budget Year** screen (Figure 1) (see Enter the Budget Data Online).

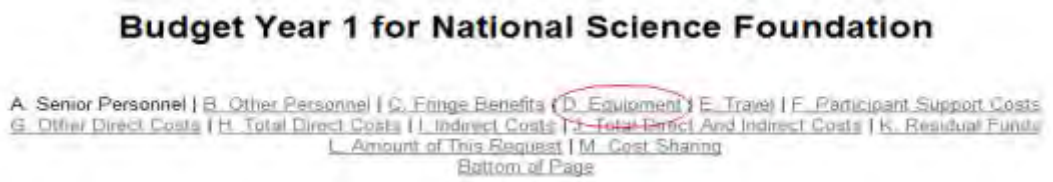


Figure 1 Budget Year screen. The Equipment link is circled.

2. Click **Equipment** (Figure 1). The **Equipment** section of the **Budget Year** screen displays (Figure 2).

Figure 2 Equipment section of the Budget Year screen.

3. Enter information in the **Equipment Item** column (Figure 2), consistent with the GPG Chapter II.C.2.g.(iii). Guidance on the allowability of equipment items can be found in 2 CFR § 200.439.
4. In the boxes for **Dollar Amount** (Figure 2), type the amount of Funds Requested by Proposer next to each item of equipment listed (no dollar signs, no commas).
5. Click the **Calculate** button (Figure 2) to calculate the total amount you are requesting for equipment.

After you have calculated the section, you can also delete an item:

1. Under the **Check Here to Delete Item** column (Figure 3), check the box for the item you want to delete.
2. Click the **Calculate** button again (Figure 3).

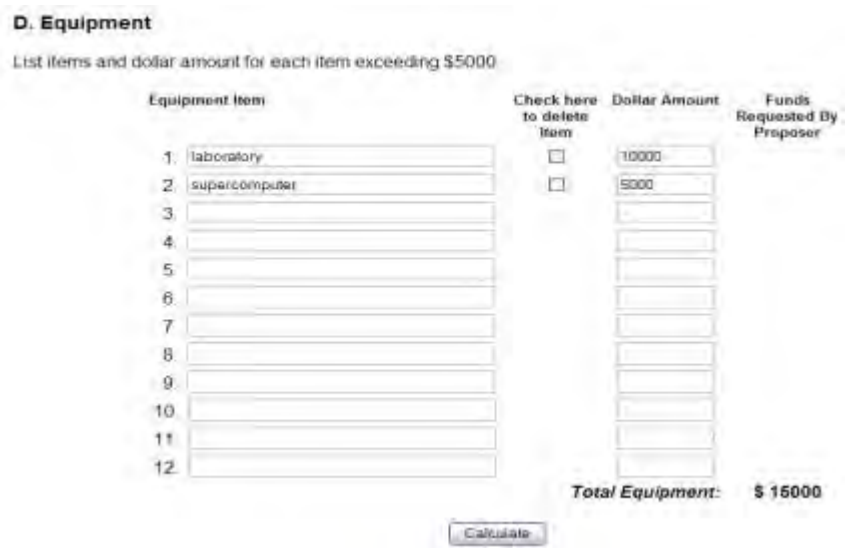


Figure 3 Equipment section of the Budget Year screen after you have clicked the Calculate button.

See also:

- Senior Personnel
- Other Personnel
- Fringe Benefits
- Equipment
- Travel
- Participant Support Costs
- Other Direct Costs
- Indirect Costs
- Cost Sharing
- Save and calculate the budget

Travel

1. Access the **Budget Year** screen (Figure 1) (see Enter the Budget Data Online).

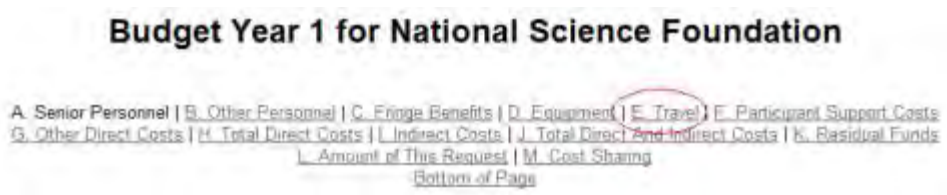


Figure 1 Budget Year screen. The Travel link is circled.

2. Click **Travel** (Figure 1). The **Travel** section of the **Budget Year** screen displays (Figure 2).

Figure 2 Travel section of the Budget Year form screen.

3. In the **Travel Domestic** box (Figure 2), type the amount of total funds you are requesting for all domestic travel for the project (no dollar signs, no commas). Domestic travel includes travel within and between the U.S., its territories and possessions.
4. In the **Travel Foreign** box (Figure 2), type the amount of total funds you are requesting for all international travel for the project (no dollar signs, no commas).
5. Click the **Calculate** button (Figure 2) to calculate the total amount you are requesting for all travel.

See also:

- Senior Personnel
- Other Personnel
- Fringe Benefits
- Equipment
- Travel
- Participant Support Costs
- Other Direct Costs
- Indirect Costs
- Cost Sharing
- Save and calculate the budget

Participant Support Costs

1. Access the **Budget Year** screen (Figure 1) (see Enter the Budget Data Online).

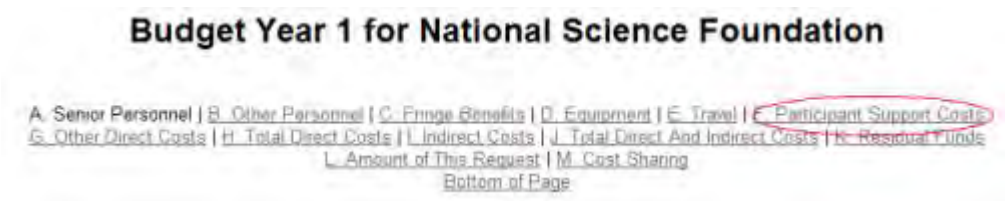


Figure 1 Budget Year screen. The Participant Support Costs link is circled.

2. Click **Participant Support Costs** (Figure 1). The **Participant Support Costs** section of the **Budget Year** screen displays (Figure 2).

Figure 2 Participant Support Costs section of the Budget Year screen.

3. Under the **Costs** column (Figure 2), type the amounts you are requesting for costs of those who are participants or trainees (but not employees) in connection with NSF-sponsored conferences. :
   - In the **Stipends** box, type the amount of funds for stipends for participants (no dollar signs, no commas).
   - In the **Travel** box, type the amount of funds for travel for participants (no dollar signs, no commas).
   - In the **Subsistence** box, type the amount of funds for subsistence for participants (no dollar signs, no commas).
   - In the **Other** box, type the amount of funds for other costs associated with participant support costs (no dollar signs, no commas).

   Any additional categories of participant support costs such as incentives, gifts, souvenirs, t-shirts and memorabilia must receive the prior written approval of the cognizant NSF Grants Officer per 2 CFR § 200.456.

   Consistent with 2 CFR § 200.68, indirect costs (F&A) are not allowed on participant support costs.
4. In the **Number of Participants** box (Figure 2), type the number of participants for whom you are requesting the funds.
5. Click the **Calculate** button (Figure 2) to calculate the total amount of funds for participant support costs.

See also:

- Senior Personnel

- Other Personnel
- Fringe Benefits
- Equipment
- Travel
- Participant Support Costs
- Other Direct Costs
- Indirect Costs
- Cost Sharing
- Save and calculate the budget

Other Direct Costs

1. Access the **Budget Year** screen (Figure 1) (see Enter the Budget Data Online).

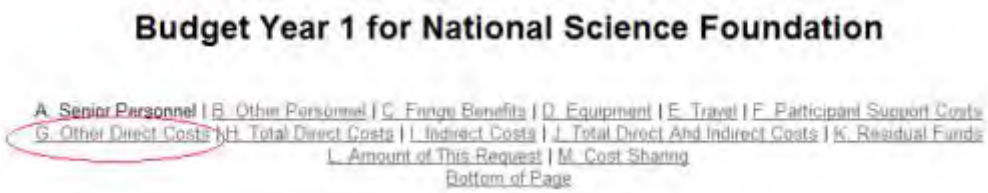


Figure 1 Budget Year screen. The Other Direct Costs link is circled.

2. Click **Other Direct Costs** (Figure 2). The **Other Direct Costs** section of the **Budget Year** screen displays (Figure 2).

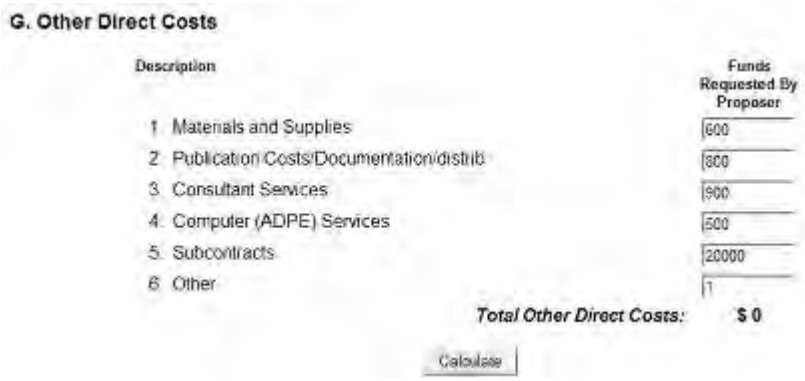


Figure 2 Other Direct Costs section of the Budget Year screen.

3. Type in the amounts you are requesting under the **Funds Requested by Proposer** column (Figure 2):
   - In the **Materials and Supplies** box, type the amount of funds for materials and supplies (no dollar signs, no commas), including the costs of computing devices. See 2 CFR § 200.20 for a definition of computing device.
   - In the **Publication Costs / Documentation / Dissemination** box, type the amount of funds for publication costs, documentation, and distribution (no dollar signs, no commas).
   - In the **Consultant Services** box, type the amount of funds for consultant services (also referred to as Professional Service Costs, the allowability of which is outlined in 2 CFR § 200.459) (no dollar signs, no commas).

- In the **Computer Services** box, type the amount of funds for the cost of computer services where it is institutional policy to charge such costs as direct charges (no dollar signs, no commas).
- In the **Subrecipients** box, type the amount of funds for any subawards (no dollar signs, no commas).
- In the **Other** box, type the amount of funds for any other direct costs (no dollar signs, no commas).

4. Click the **Calculate** button (Figure 2) to calculate the total amount of funding for other direct costs.

See also:

- Senior Personnel
- Other Personnel
- Fringe Benefits
- Equipment
- Travel
- Participant Support Costs
- Other Direct Costs
- Indirect Costs
- Cost Sharing
- Save and calculate the budget

Indirect Costs

For instructions on Indirect Costs, go to the GPG.II.C.2.g(viii).

See also:

- Senior Personnel
- Other Personnel
- Fringe Benefits
- Equipment
- Travel
- Participant Support Costs
- Other Direct Costs
- Indirect Costs
- Cost Sharing
- Save and calculate the budget

Cost Sharing

The ability to enter cost sharing will only be available for those solicitations where cost sharing is required.

1. Access the **Budget Year** screen (Figure 1) (see Enter the Budget Data Online).

Figure 1 Budget Year screen. The Cost Sharing link is circled.

2. Click **Cost Sharing** (Figure 1). The **Cost Sharing** section of the **Budget Year** screen displays (Figure 1).

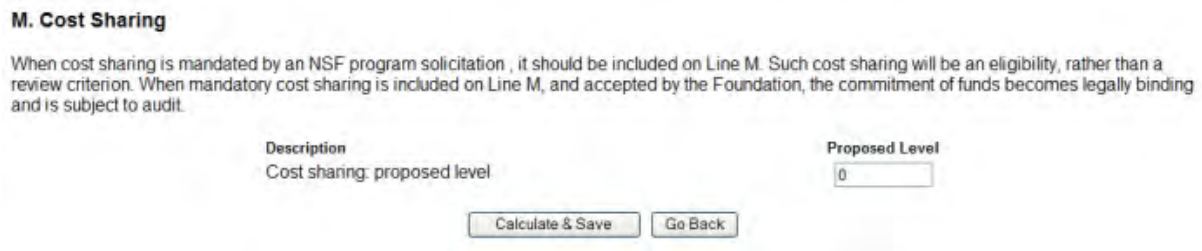


Figure 2 Cost Sharing section of the Budget Year form screen.

3. In the **Proposed Level** box (Figure 2), type the proposed level of cost sharing (no dollar signs, no commas).

See also:

- Senior Personnel
- Other Personnel
- Fringe Benefits
- Equipment
- Travel
- Participant Support Costs
- Other Direct Costs
- Indirect Costs
- Cost Sharing
- Save and calculate the budget

Save and Calculate the Budget

1. Access the **Budget Year** screen (Figure 1) (see Enter the Budget Data Online).

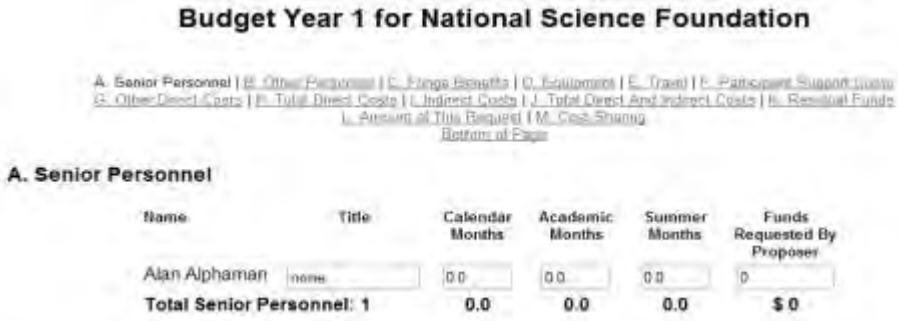


Figure 1 Upper portion of the Budget Year screen.

2. Whenever you finish a session or when you have finished entering the budget data, click the **Calculate and Save** button at the bottom of the **Budget Year** screen (Figure 2). The calculated amount for the entire budget for that year displays in the **Amount of This Request** section of the **Budget Year** screen (Figure 3).

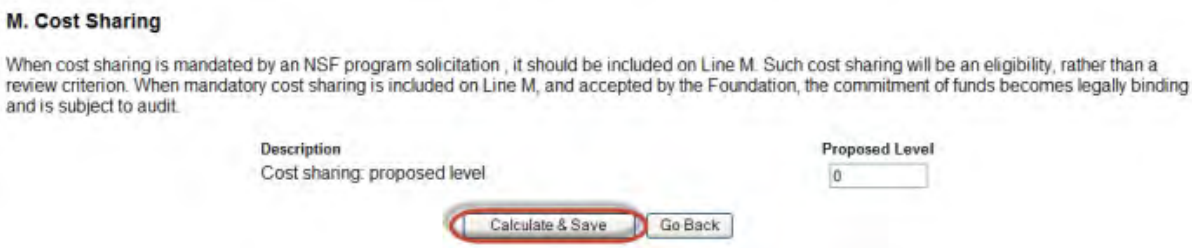


Figure 2 Calculate and Save button (circled) at the bottom of the Budget Year screen.

Figure 3 Amount of This Request section of the Budget Year screen with the total amount of the budget for that year displayed.

3. Click the **Go Back** button (Figure 2) at the bottom of the **Budget Year** screen. The **Project Budget** screen displays (Figure 4) with the budget total for that year shown.

Figure 4 Project Budget screen. The budget total is circled for the year you entered data.

Step 3 Justify the Budget

1. Access the **Project Budget** screen (Figure 1) (see Create a Budget).

Figure 1 Project Budget screen. The Budget Justification link is circled.

2. Click **Budget Justification** (Figure 1).

Figure 2 Budget Justification screen.

Upload the Budget Justification

The **Budget Justification File Upload** screen displays (Figure 3). See Upload a File for directions.

Figure 2 Budget Justification File Upload screen.

When a Budget Justification has been uploaded, the **Budget Justification File Upload** screen displays as in Figure 5. This screen gives you three options:

- Display Current Budget Justification
- Delete Current Budget Justification
- Upload a New Budget Justification (This option automatically replaces the already uploaded Budget Justification.)

Figure 5 Budget Justification File Upload screen if a Justification has been uploaded.

Display Current Justification

On the **Budget Justification File Upload** screen (Figure 5), click the **Display Current Budget Justification** button. The previously uploaded Budget Justification displays in PDF format. If you need to download Adobe Reader, see Adobe Reader for FastLane.

Delete Current Budget Justification

1. On the **Budget Justification File Upload** screen (Figure 5), click the **Delete Current Budget Justification** button. A screen displays with a message for you to confirm that you want to delete the file.
2. Click the **Yes** button. The **Budget Justification File Upload** screen displays as in Figure 4.

Upload a New Budget Justification

Follow the directions in Upload a File. Uploading a new Budget Justification automatically replaces the previous one.

Copy a Budget from One Year for Another Year

If you have completed a budget for one year, you can copy that budget for another year. If you need to edit the copied budget, see Edit a Budget.

1. Access the **Project Budget** screen (Figure 1) (see Create a Budget).

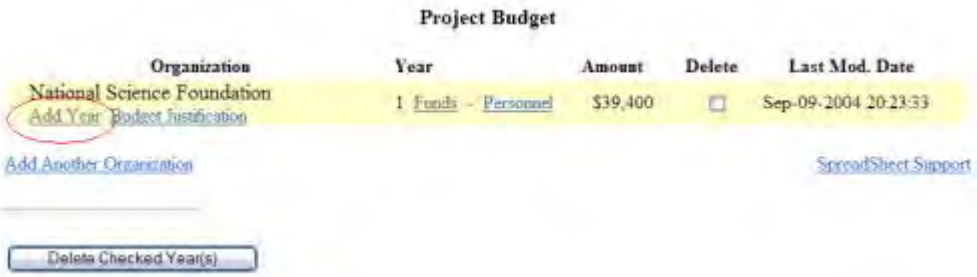


Figure 1 Project Budget screen. The Add Year link is circled.

2. Click **Add Year** under your organization's name (Figure 1). The **Add Year** screen displays (Figure 2) for your organization with two lists on the page:
   - The list of budget years you can add to create a budget
   - The list of budget years for which a budget exists

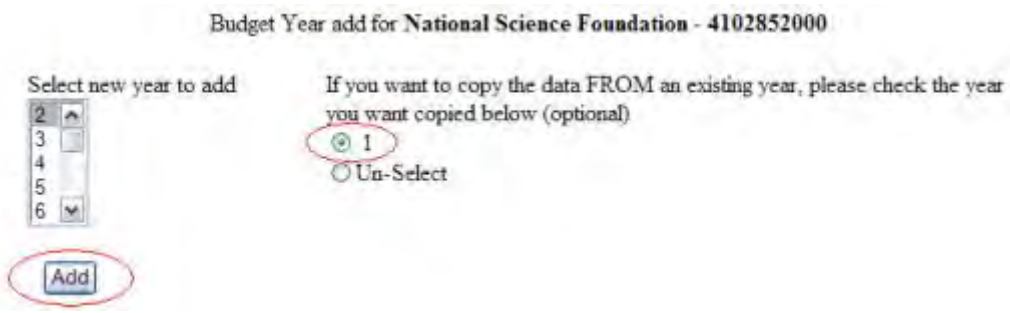


Figure 2 Budget Year Add screen with a list of years to add (left) and a list of years for which a budget exists (right). The Add button and the radio button for a year are circled.

3. Highlight a year to add from the **Select New Year to Add** list (Figure 2).
4. On the right side of the **Budget Year Add** screen (Figure 2), click the radio button for the year you want to copy the budget from.
5. Click the **Add** button (Figure 2). The **Project Budget** screen displays (Figure 3) with the copied budget listed for the year you selected.

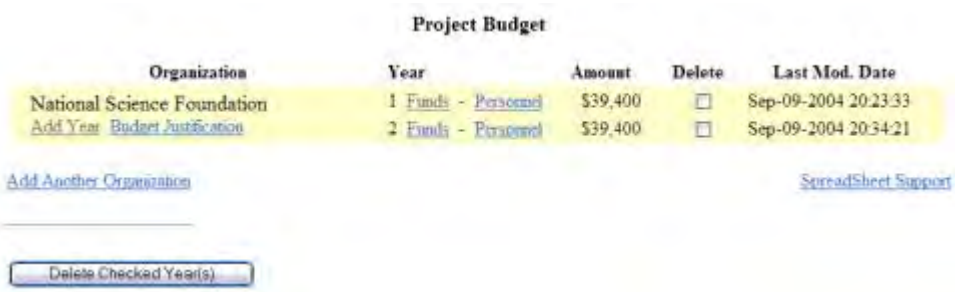


Figure 3 Project Budget screen with the new budget listed for the newly selected year.

See also:

- Create a Budget
- Edit a Budget
- Add or Delete Senior Personnel
- Delete a Budget Year
- Work on a Budget for a Subrecipient Organization

Edit a Budget

1. Access the **Project Budget** screen (Figure 1) (see Create a Budget).

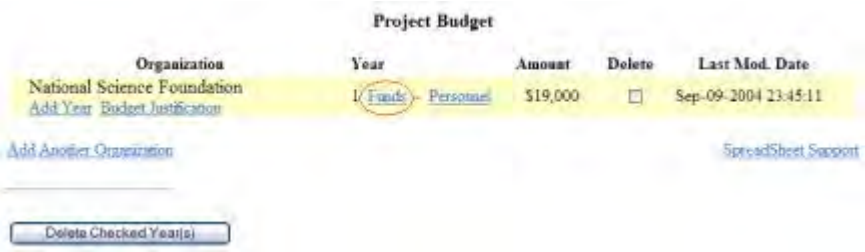


Figure 1 Project Budget screen. The Funds link is circled for a budget year.

2. Click **Funds** for the budget year that you want to edit. The **Budget Year** screen displays (Figure 2) for that year's budget.

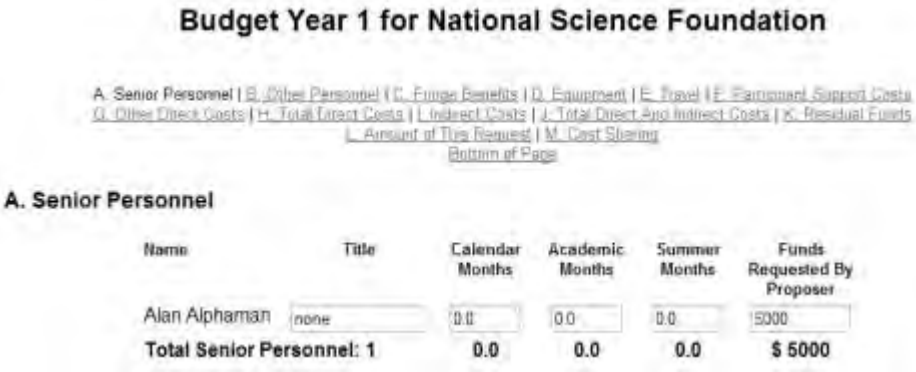


Figure 2 Budget Year screen.

3. Edit the budget as you require (see Enter Budget Data Online for instructions).
4. Click the **Calculate and Save** button at the bottom of the screen (Figure 3) when you are finished.

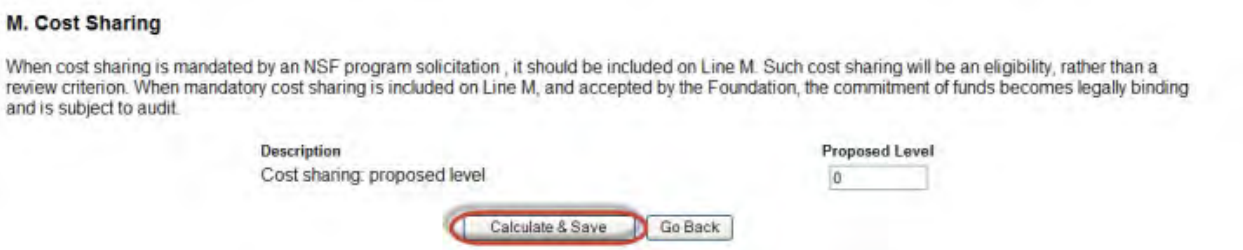


Figure 3 Calculate and Save button (circled) at the bottom of the Budget Year screen.

See also:

- Create a Budget
- Copy a Budget from One Year for Another Year
- Add or Delete Senior Personnel
- Delete a Budget Year
- Work on a Budget for a Sub recipient Organization

Add or Delete Senior Personnel

1. Access the **Project Budget** screen (Figure 1) (see Create a Budget).

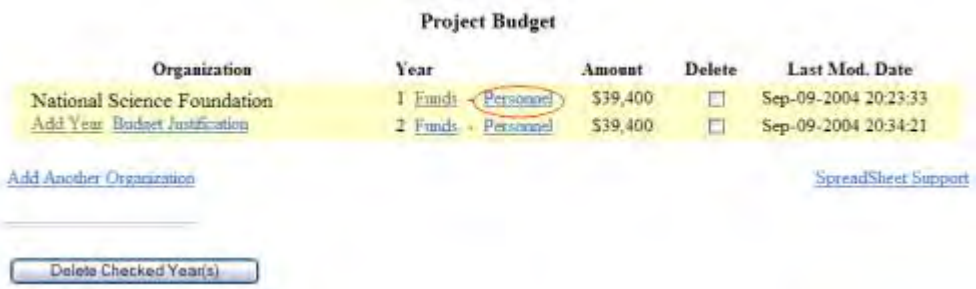


Figure 1 Project Budget screen. The Personnel link is circled.

2. Click **Personnel** for the organization and budget year for which you want to add or delete the personnel. The **Budget Personnel** screen displays (Figure 2).

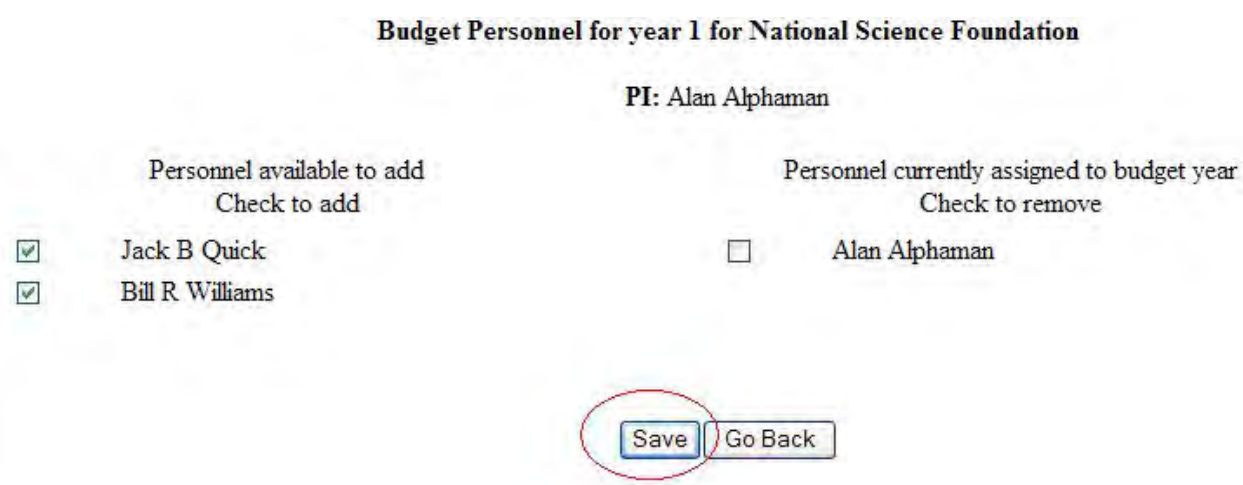


Figure 2 Budget Personnel screen with check marks next to the two senior persons. The Save button is circled.

Add a Senior Person

1. On the **Budget Personnel** screen (Figure 2), click the check mark box of the person in the **Personnel Available to Add** list that you want to add as a senior person for whom you are requesting funds.
2. Click the **Save** button (Figure 2). The **Project Budget** screen displays (Figure 1).

Delete a Senior Person

1. On the **Budget Personnel** screen (Figure 3), click the check mark box of the person in the **Personnel Currently Assigned to Budget Year** list that you want to delete.

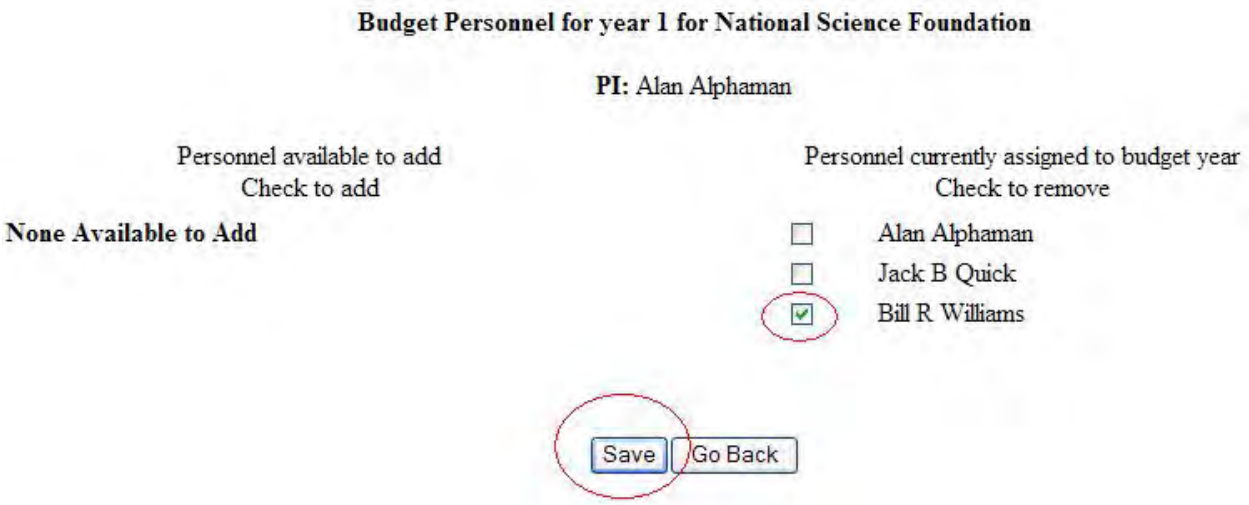


Figure 3 Budget Personnel screen with the check mark by the name of a senior person. The Save button is circled.

2. Click the **Save** button (Figure 3). The **Project Budget** screen displays (Figure 1).

See also:

- Create a Budget
- Copy a Budget from One Year for Another Year
- Edit a Budget
- Delete a Budget Year
- Work on a Budget for a Sub recipient Organization

Delete a Budget Year

You can delete a budget year and all the data entered for it.

1. Access the **Project Budget** screen (Figure 1) (see Create a Budget).

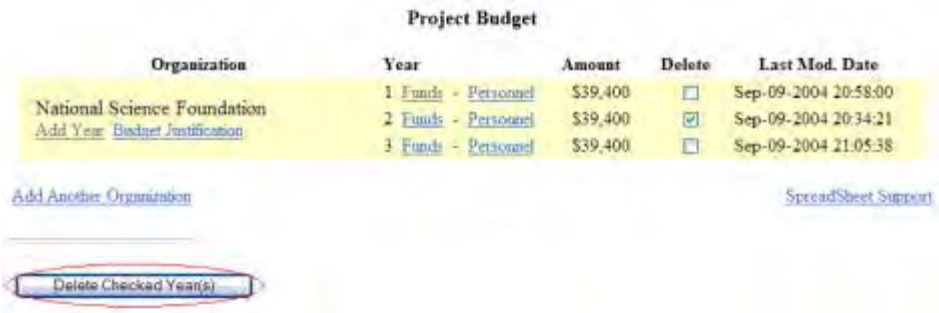


Figure 1 Project Budget screen. The Delete Checked Year(s) button is circled.

2. In the **Delete** column (Figure 1), click the check mark box for the budget year you want to delete.
3. Click the **Delete Checked Year(s)** button (Figure 1). A screen displays (Figure 2) with a message for you to confirm that you want to delete this budget year.

Figure 2 Screen with a message for you to confirm that you want to delete the checked budget year. The Yes button is circled.

4. Click the **Yes** button (Figure 2). The **Project Budget** screen budget screen displays (Figure 3) without that budget year.

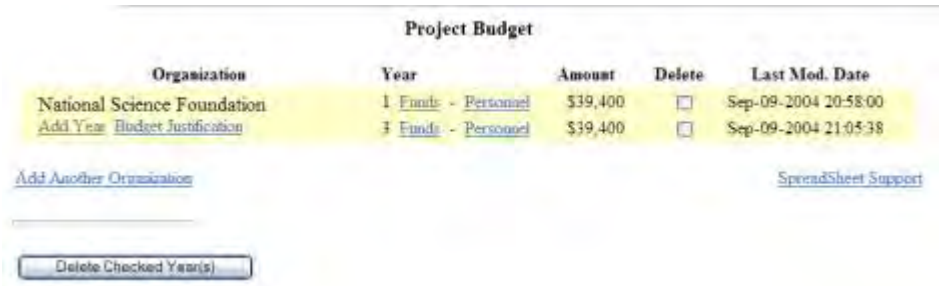


Figure 3 Project Budget screen without the deleted budget year.

See also:

- Create a Budget
- Copy a Budget from One Year for Another Year
- Edit a Budget
- Add or Delete Senior Personnel
- Work on a Budget for a Sub recipient Organization

Work on Budget for Subrecipient Organization

Add a Subrecipient Organization

A separate budget should be provided for each subrecipient along with a description of the work performed.

1. Access the **Project Budget** screen (Figure 1) (see Create a Budget).

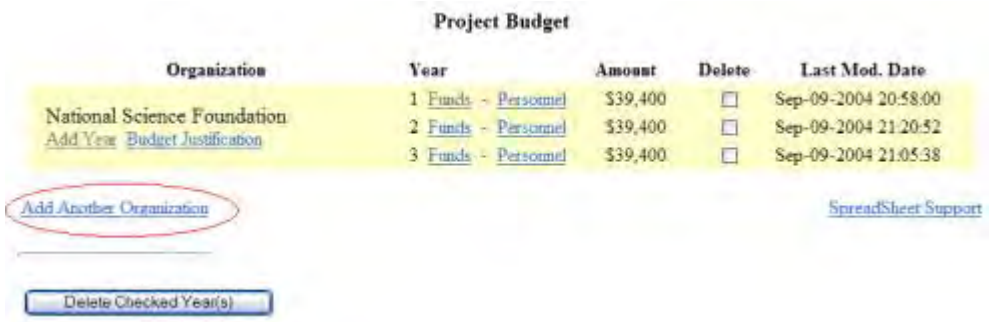


Figure 1 Project Budget screen. The Add Another Organization link is circled.

2. Click **Add Another Organization** (Figure 1). The **Current Budget Organizations** screen displays (Figure 2) with all the budget organizations listed at the top. At the bottom of the screen is the link to search for the organization you want to add.

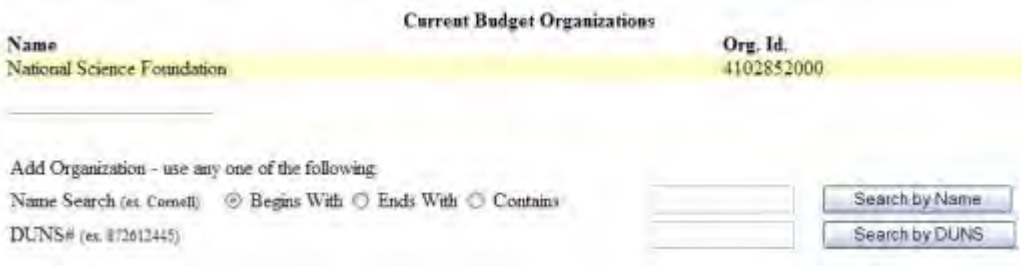


Figure 2 Current Budget Organizations screen.

You have two options for searching for the organization you want to add:
- Search by name
- Search by DUNS (Data Universal Numbering System) number

Search by Name

1. On the **Current Budget Organizations** screen (Figure 2), select the search type option:
   - **Begins with** returns all organizations whose name begins with the text entered.
   - **Ends with** returns all organizations whose name ends with the text entered.
   - **Contains** returns all organizations whose name contains the text entered.
2. Type in the box the string (at least three characters) to search for.
3. Click the **Search by Name** button (Figure 2). The **Name-Inst ID** screen displays (Figure 3) (see Select the Organization from the Results).

Figure 3 Name-Inst ID screen. The Select button is circled.

Search by DUNS Number

1. On the **Current Budget Organizations** screen (Figure 2), type in the nine-digit DUNS number.
2. Click the **Search by DUNS** button (Figure 2). The **Name-Inst ID** screen displays (Figure 3).

Select the Organization from the Results

1. On the **Name-Inst ID** screen (Figure 3), highlight the name of the organization you want to add to the project from the list.
2. Click the **Select** button (Figure 3). *If the organization has a registered PI(s)*, the **Principal Investigation Designation** screen displays (Figure 4).

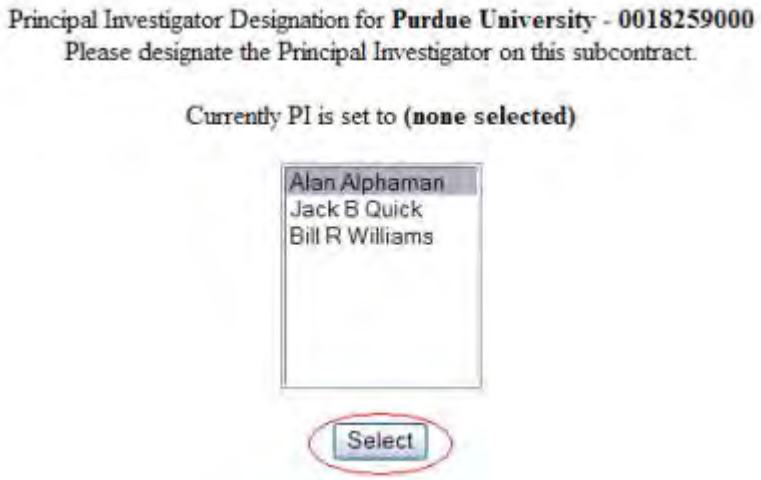


Figure 4 Principal Investigator Designation screen. The Select button is circled.

3. In the **Currently PI Is Set To** list (Figure 4), highlight the name of the person designated as the PI for the proposal.

4. Click the **Select** button (Figure 4). The **Project Budget** screen displays (Figure 5) with the subrecipient organization added and the first budget year added for the organization, although the budget has not yet been completed. You can now take the following actions for this organization:
   - Add a year for the subrecipient organization
   - Create a budget for the subrecipient organization for a year
   - Copy a budget from one year to another year for the subrecipient organization
   - Justify the budget for the subrecipient organization
   - Change the PI for the subrecipient organization
   - Change the subrecipient organization and transfer the personnel and budget from the old to the new organization

Figure 5 Project Budget screen. The subrecipient organization section is circled.

See also:
- Create a Budget
- Copy a Budget from One Year for Another Year
- Edit a Budget
- Add or Delete Senior Personnel
- Delete a Budget Year

Add a Subrecipient Organization

A separate budget should be provided for each subrecipient along with a description of the work performed.

1. Access the **Project Budget** screen (Figure 1) (see Create a Budget).

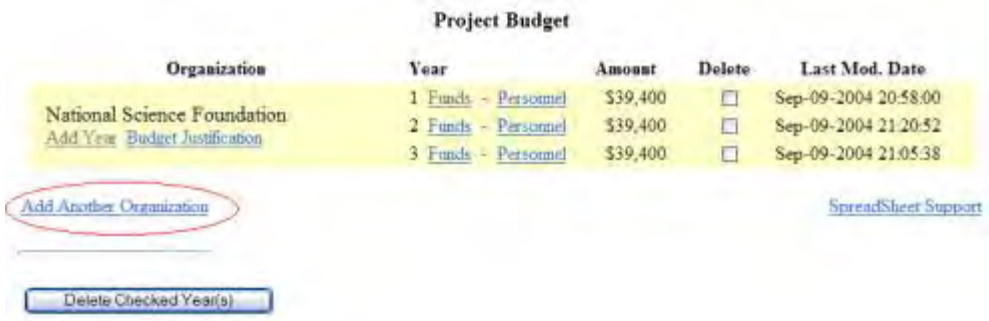


Figure 1 Project Budget screen. The Add Another Organization link is circled.

2. Click **Add Another Organization** (Figure 1). The **Current Budget Organizations** screen displays (Figure 2) with all the budget organizations listed at the top. At the bottom of the screen is the link to search for the organization you want to add.

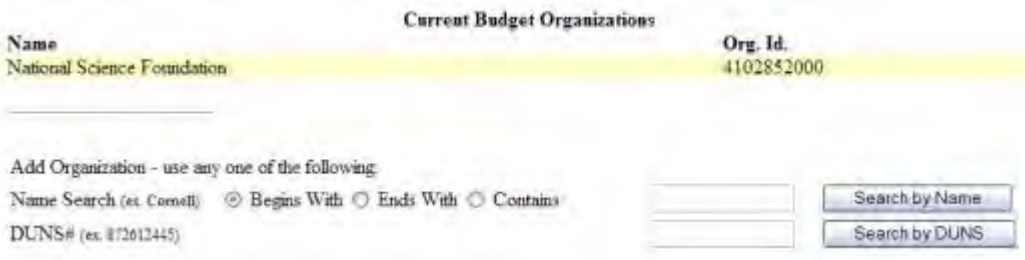


Figure 2 Current Budget Organizations screen.

You have two options for searching for the organization you want to add:

- Search by name
- Search by DUNS (Data Universal Numbering System) number

Search by Name

1. On the **Current Budget Organizations** screen (Figure 2), select the search type option:
   - **Begins with** returns all organizations whose name begins with the text entered.
   - **Ends with** returns all organizations whose name ends with the text entered.
   - **Contains** returns all organizations whose name contains the text entered.
2. Type in the box the string (at least three characters) to search for.
3. Click the **Search by Name** button (Figure 2). The **Name-Inst ID** screen displays (Figure 3) (see Select the Organization from the Results).

Figure 3 Name-Inst ID screen. The Select button is circled.

Search by DUNS Number

1. On the **Current Budget Organizations** screen (Figure 2), type in the nine-digit DUNS number.
2. Click the **Search by DUNS** button (Figure 2). The **Name-Inst ID** screen displays (Figure 3).

Select the Organization from the Results

1. On the **Name-Inst ID** screen (Figure 3), highlight the name of the organization you want to add to the project from the list.
2. Click the **Select** button (Figure 3). *If the organization has a registered PI(s)*, the **Principal Investigation Designation** screen displays (Figure 4).

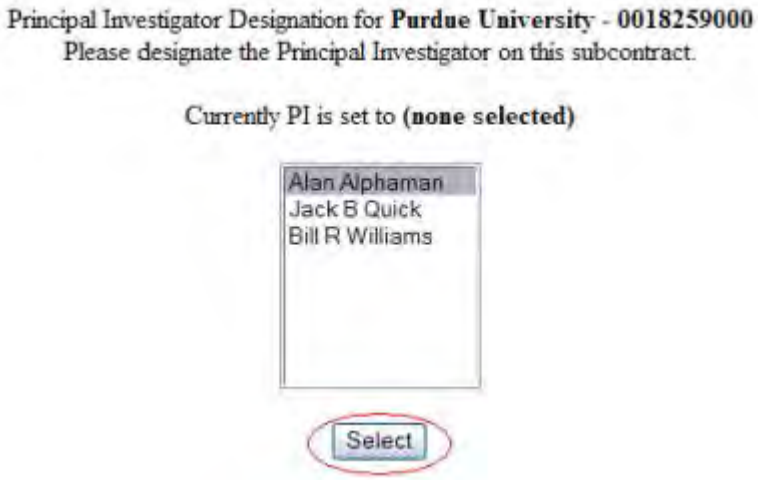


Figure 4 Principal Investigator Designation screen. The Select button is circled.

3. In the **Currently PI Is Set To** list (Figure 4), highlight the name of the person designated as the PI for the proposal.

4. Click the **Select** button (Figure 4). The **Project Budget** screen displays (Figure 5) with the subrecipient organization added and the first budget year added for the organization, although the budget has not yet been completed. You can now take the following actions for this organization:
   - Add a year for the subrecipient organization
   - Create a budget for the subrecipient organization for a year
   - Copy a budget from one year to another year for the subrecipient organization
   - Justify the budget for the subrecipient organization
   - Change the PI for the subrecipient organization
   - Change the subrecipient organization and transfer the personnel and budget from the old to the new organization

Figure 5 Project Budget screen. The subrecipient organization section is circled.

See also:
- Create a Budget
- Copy a Budget from One Year for Another Year
- Edit a Budget
- Add or Delete Senior Personnel
- Delete a Budget Year

Add a Year for the Subrecipient Organization

1. Access the **Project Budget** screen (Figure 1) (see Add a Subrecipient Organization).

Figure 1 Project Budget screen. The Add Year link for the subrecipient organization is circled.

2. Click **Add Year** under the name of the subrecipient organization (Figure 1). The **Budget Year Add** screen displays (Figure 2) for that organization.

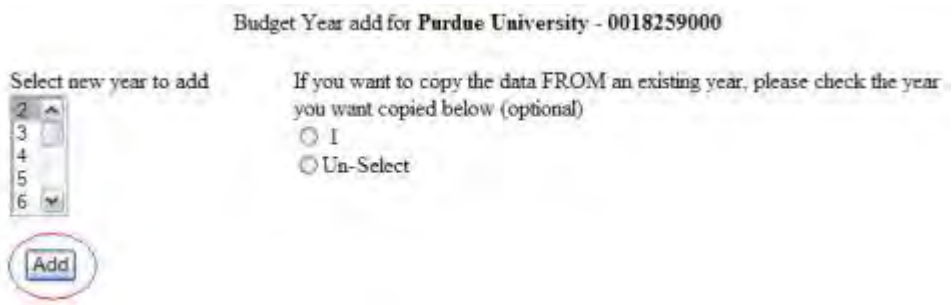


Figure 2 Budget Year Add screen. The Add button is circled.

3. Select a year to add from the **Select New Year to Add** list (Figure 2).
4. Click the **Add** button (Figure 2). The **Project Budget** screen displays (Figure 3) with the year listed in the **Year** column for that organization. The screen also displays **Funds** and **Personnel** options for that budget year.

Figure 3 Project Budget screen with Years 1 and 3 added for creating a budget for a subrecipient organization.

See also:

- Create a budget for the subrecipient organization for a year
- Copy a budget from one year to another year for the subrecipient organization
  - Justify the budget
  - Change the PI for the subrecipient organization
  - Change the subrecipient organization
  - Delete a subrecipient organization

Create a Budget for the Subrecipient Organization

Access the **Project Budget** screen (Figure 1) (see Add a subrecipient Organization).

Figure 1 Project Budget screen. The Funds link and the Spreadsheet Support link are circled.

To create a budget for a selected year, you have these options:

- On the **Project Budget** screen (Figure 1), click **Funds** on the line for that budget year and enter the budget data online in the form provided.
- On the **Project Budget** screen (Figure 1), click **Spreadsheet Support** to complete the budget offline.

After you have completed the budget for the subrecipient organization, you must also justify the budget.

You can also copy a budget from one year to another for a subrecipient organization.

See also:

- Add a year for the subrecipient organization
- Copy a budget from one year to another year for the subrecipient organization
  - Justify the budget
  - Change the PI for the subrecipient organization
  - Change the subrecipient organization
  - Delete a subrecipient organization

Change the PI for a Subrecipient Organization

1. Access the **Project Budget** screen (Figure 1) (see Add a subrecipient Organization).

Figure 1 Project Budget screen. The Change PI link is circled.

2. Under the name of the subrecipient organization, click **Change PI** (Figure 1). The **Principal Investigator Designation** screen displays (Figure 2).

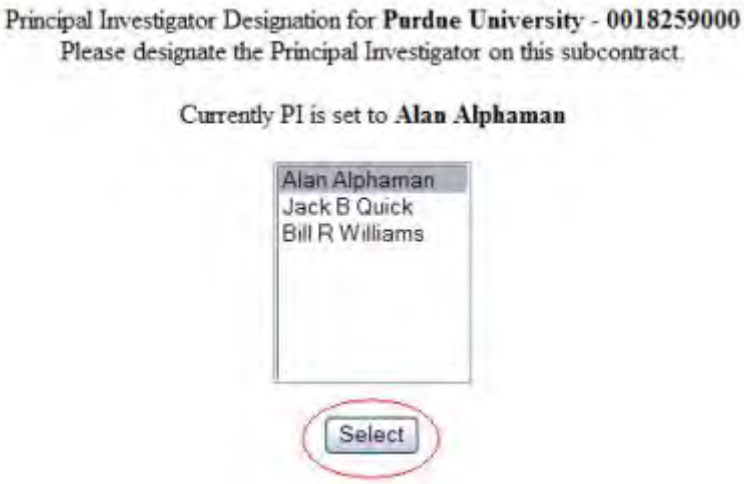


Figure 2 Principal Investigator Designation screen. The Select button is circled.

3. In the **Currently PI Is Set To** list (Figure 2), highlight the name of the person you are designating as the new PI.
4. Click the **Select** button (Figure 2). The **Project Budget** screen displays (Figure 1).

See also:

- Add a year for the subrecipient organization
- Create a budget for the subrecipient organization for a year
- Copy a budget from one year to another year for the subrecipient organization
  - Justify the budget
  - Change the subrecipient organization
  - Delete a subrecipient organization

subrecipient Change the Subrecipient Organization

1. Access the **Project Budget** screen (Figure 1) (see Add a subrecipient Organization).

Figure 1 Project Budget screen. The Change Org. link is circled.

2. Click **Change Org.** under the name of the subrecipient organization you want to change (Figure 1). The **Change Organization** screen displays (Figure 2).

Figure 2 Change Organization screen.

You have two options for searching for the organization you want to add:

- Search by name
- Search by DUNS (Data Universal Numbering System) number

Search by Name

1. On the **Current Budget Organizations** screen (Figure 2), select the search type option:
   - **Begins with** returns all organizations whose name begins with the text entered.
   - **Ends with** returns all organizations whose name ends with the text entered.
   - **Contains** returns all organizations whose name contains the text entered.
2. Type in the box the string (at least three characters) to search for.
3. Click the **Search by Name** button (Figure 2). The **Name-Inst ID** screen displays (Figure 3) (see Select the Organization from the Results).

Figure 3 Name-Inst ID screen. The Select button is circled.

Search by DUNS Number

1. On the **Current Budget Organizations** screen (Figure 2), type in the nine-digit DUNS number.
2. Click the **Search by DUNS** button (Figure 2). The **Name-Inst ID** screen displays (Figure 3) (see Select the Organization from the Results).

Select the Organization from the Results

1. On the **Name-Inst ID** screen (Figure 3), highlight the name of the organization you want to add to the project from the list.
2. Click the **Select** button (Figure 3). The **Project Budget** screen displays (Figure 4) with the name of the new organization added and the name of the original subrecipient organization deleted.

Figure 4 Project Budget screen with the name of the new subrecipient organization.

See also:

- Add a year for the subrecipient organization
- Create a budget for the subrecipient organization for a year

- Copy a budget from one year to another year for the subrecipient organization
  - Justify the budget
  - Change the PI for the subrecipient organization
  - Delete a subrecipient organization

Delete a Subrecipient Organization

1. Access the **Project Budget** screen (Figure 1) (see Add a subrecipient Organization).

Figure 1 Project Budget screen. The Delete Checked Organization(s) button is circled.

2. On the **Project Budget** screen (Figure 1), click the check mark box to the left of the organization that you want to delete from the proposal.
3. Click **Delete Checked Organization(s)** (Figure 1). A screen displays (Figure 2) with a message for you to confirm that you want to delete this organization.

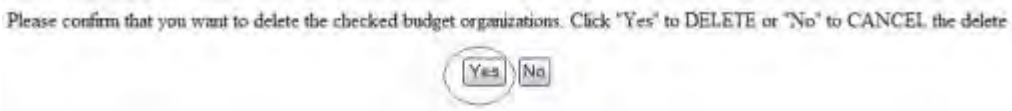


Figure 2 Screen with a message for you to confirm that you want to delete the organization. The Yes button is circled.

4. Click the **Yes** button (Figure 1). The **Project Budget** screen displays (Figure 3) without the name of the organization you deleted.

Figure 3 Project Budget screen with the name of the deleted organization removed.

See also:

- Add a year for the subrecipient organization
- Create a budget for the subrecipient organization for a year
- Copy a budget from one year to another year for the subrecipient organization
  - Justify the budget
  - Change the PI for the subrecipient organization
  - Change the subrecipient organization

Facilities, Equipment, and Other Resources

What Are Facilities, Equipment, and Other Resources?

In the Facilities, Equipment, and Other Resources section, you describe theresources available to perform the effort you are proposing. Consult the *Proposal &Award Policies & Procedure's Guide (PAPPG)* Chapter II.C.2.i for a full description.

Work on Facilities, Equipment, and Other Resources

1. Access the **Form Preparation** screen (Figure 1) (see Create a New Proposal, or Edit a Proposal,).

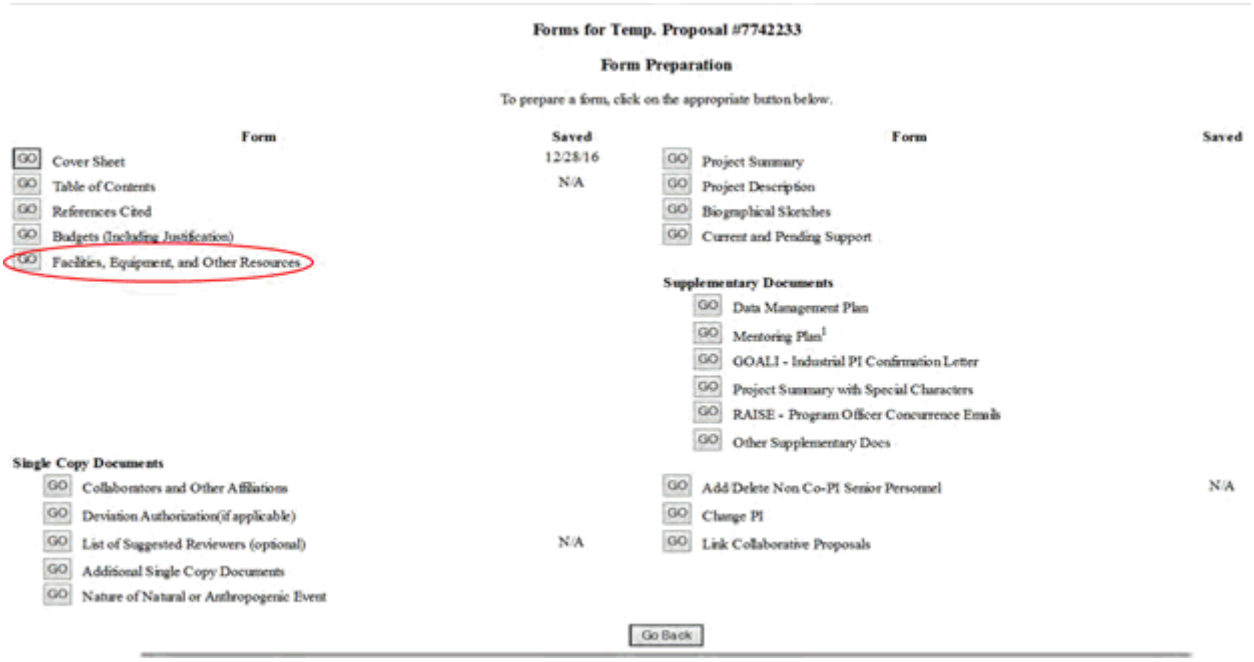


Figure 1 Form Preparation screen. The Go button for Facilities, Equipment, and Other Resources is circled.

2. Click the **Go** button for Facilities, Equipment, and Other Resources (Figure 1). The **Facilities, Equipment, and Other Resources** screen displays (Figure 2).

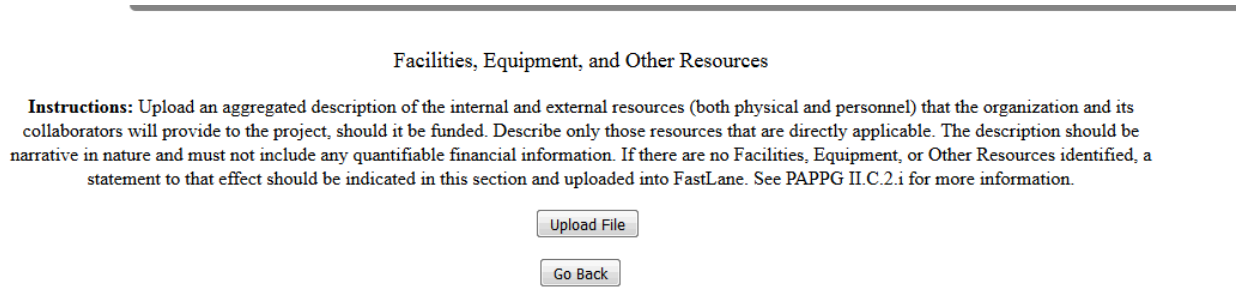


Figure 2 Facilities, Equipment, and Other Resources form screen.

You have this option:

- Upload Facilities, Equipment, and Other Resources

See also:

- Cover Sheet
- Table of Contents
- References Cited
- Budgets (Including Justification)
- Deviation Authorization
- List of Suggested Reviewers

- Additional Single Copy Documents
- Project Summary
- Project Description
- Biographical Sketches
- Current and Pending Support
- Supplementary Docs
- Add/Delete Non-Co-PI Senior Personnel
- Change PI
- Link Collaborative Proposals
- Proposal Classification Form

What Are Facilities, Equipment, and Other Resources?

In the Facilities, Equipment, and Other Resources section, you describe theresources available to perform the effort you are proposing. Consult the *Proposal &Award Policies & Procedure's Guide (PAPPG)* Chapter II.C.2.i for a full description.

Work on Facilities, Equipment, and Other Resources

1. Access the **Form Preparation** screen (Figure 1) (see Create a New Proposal, or Edit a Proposal,).

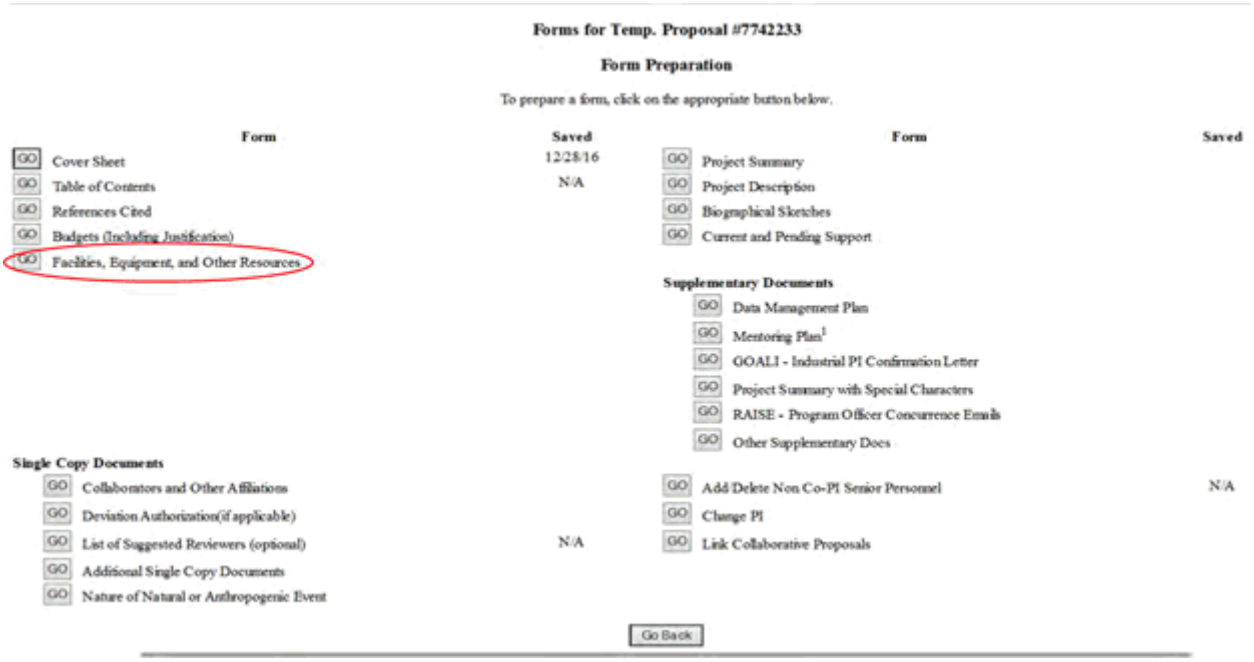


Figure 1 Form Preparation screen. The Go button for Facilities, Equipment, and Other Resources is circled.

2. Click the **Go** button for Facilities, Equipment, and Other Resources (Figure 1). The **Facilities, Equipment, and Other Resources** screen displays (Figure 2).

Facilities, Equipment, and Other Resources

Instructions: Upload an aggregated description of the internal and external resources (both physical and personnel) that the organization and its collaborators will provide to the project, should it be funded. Describe only those resources that are directly applicable. The description should be narrative in nature and must not include any quantifiable financial information. If there are no Facilities, Equipment, or Other Resources identified, a statement to that effect should be indicated in this section and uploaded into FastLane. See PAPPG II.C.2.i for more information.

Upload File

Go Back

Figure 2 Facilities, Equipment, and Other Resources form screen.

You have this option:

- Upload Facilities, Equipment, and Other Resources

See also:

- Cover Sheet
- Table of Contents
- References Cited
- Budgets (Including Justification)
- Deviation Authorization
- List of Suggested Reviewers
- Additional Single Copy Documents
- Project Summary
- Project Description
- Biographical Sketches
- Current and Pending Support
- Supplementary Docs
- Add/Delete Non-Co-PI Senior Personnel
- Change PI
- Link Collaborative Proposals
- Proposal Classification Form

Upload Facilities, Equipment, and Other Resources

1. Access the **Facilities, Equipment, and Other Resources** screen (Figure 1) (see Work on Facilities, Equipment, and Other Resources).

Facilities, Equipment, and Other Resources

Instructions: Upload an aggregated description of the internal and external resources (both physical and personnel) that the organization and its collaborators will provide to the project, should it be funded. Describe only those resources that are directly applicable. The description should be narrative in nature and must not include any quantifiable financial information. If there are no Facilities, Equipment, or Other Resources identified, a statement to that effect should be indicated in this section and uploaded into FastLane. See PAPPG II.C.2.i for more information.

Upload File

Go Back

Figure 1 Facilities, Equipment, and Other Resources form screen. The Upload File button is circled.

2. Click the Upload **File** button (Figure 1). The **Facilities, Equipment, and Other Resources File Upload** screen displays (Figure 2). See Upload a File.

Figure 2 Facilities, Equipment, and Other Resources File Upload screen.

If a file on Facilities, Equipment, and Other Resources has already been uploaded, when you click the **Go** button for **Facilities, Equipment, and Other Resources** on the **Form Preparation** screen, the **Facilities, Equipment, and Other Resources File Upload** screen displays (Figure 3) with these options:

- Display Current Facilities, Equipment, and Other Resources
- Delete Current Facilities, Equipment, and Other Resources
- Upload a New Facilities, Equipment, and Other Resources (This option automatically replaces the already uploaded file.)

Figure 3 Facilities, Equipment, and Other Resources File Upload screen after a file has been uploaded.

Display Current Facilities, Equipment, and Other Resources

Click the **Display Current Facilities, Equipment, and Other Resources** button (Figure 3). The previously uploaded file displays in PDF format. If you need to download Adobe Reader, see Adobe Reader for FastLane.

Delete Current Facilities, Equipment, and Other Resources

1. Click the **Delete Current Facilities, Equipment, and Other Resources** button (Figure 3). A screen displays with a message for you to confirm that you want to delete the file.
2. Click the **OK** button. The **Form Preparation** screen displays.

Upload a New Facilities, Equipment, and Other Resources

Follow the directions in Upload a File. Uploading a new **Facilities, Equipment, and Other Resources** file automatically replaces the previous one.

What Is a Deviation Authorization?

A Deviation Authorization grants you exceptions to the requirements of the *Proposal & Award Policies & Procedures Guide (PAPPG)*. See PAPPG Chapter II.A for more on deviations.

In this form, you provide either one of the following:

- Program Solicitation number, in the appropriate block on the Cover Sheet
- Name and title of the NSF official who authorized the deviation and the date of authorization

Work on Deviation Authorization

1. Access the **Form Preparation** screen (Figure 1) (see Create a New Proposal, or Edit a Proposal).

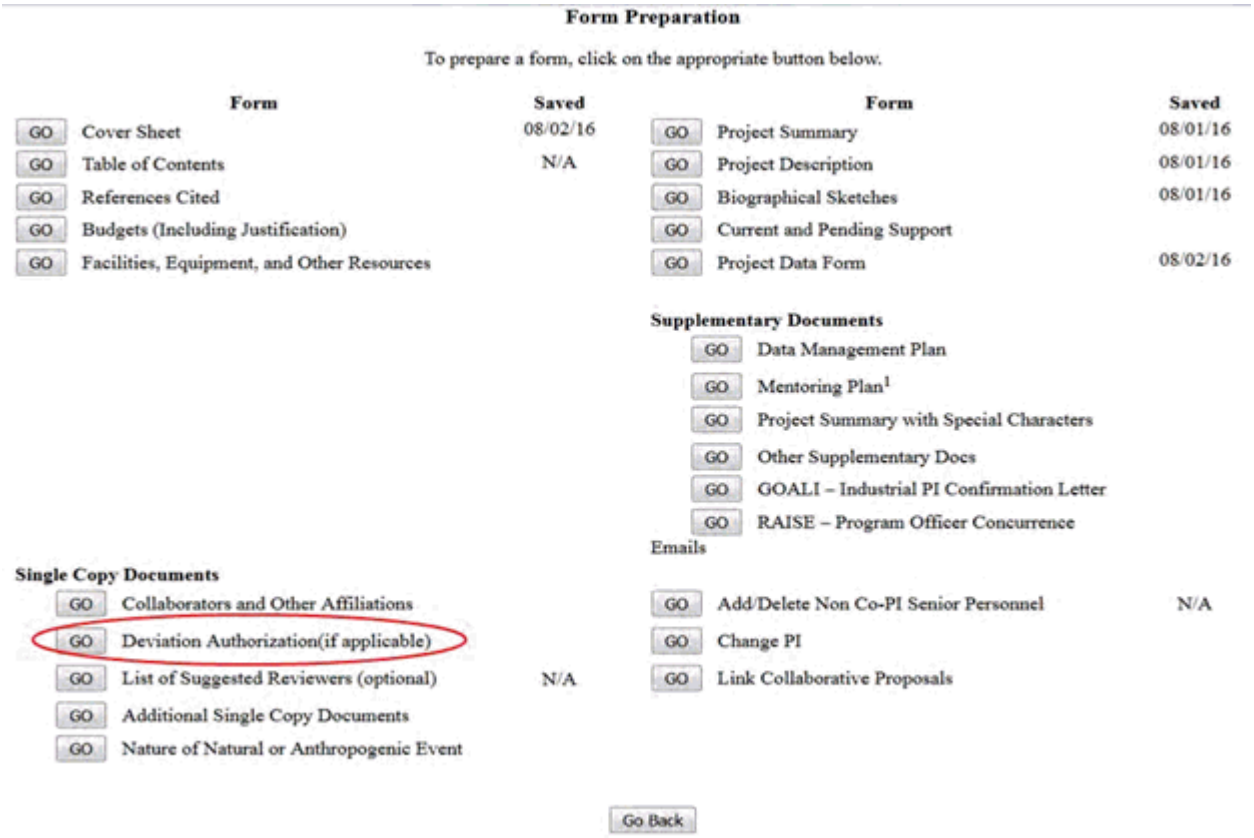


Figure 1 Form Preparations screen. The Go button for Deviation Authorization is circled.

2. Click the **Go** button for Deviation Authorization (Figure 1). The **Deviation Authorization** screen displays (Figure 2).

Deviation Authorization (If Applicable)

Deviation Authorization: It is important that all proposals conform to the instructions provided in the PAPPG. **Conformance is required and will be strictly enforced unless a deviation has been approved.** Proposals that are not consistent with these instructions may not be considered by NSF. Particular attention is given to proposal length, content and formatting, including the page limitation on the Project Description and other proposal sections, such as the use of Appendices and required content of the Biographical Sketches. Any deviations from these instructions must be authorized in advance by NSF. Deviations may be authorized in one of two ways:

1. through specification of different requirements in an NSF Announcement; or
2. by the written approval of the cognizant NSF Assistant Director/Office Head or designee.

Such deviations may be a "blanket deviation" for a particular program or programs, or in rare instances, an "individual" deviation for a particular proposal. Proposers may deviate from these instructions only to extent authorized. Proposals must identify the deviation in one of the following ways as appropriate: (a) by identifying the program announcement number in the appropriate block on the NSF Form 1207; or (b) by identifying the name, date and title of the NSF official authorizing the deviation in the space provided below.

Type the Deviation Authorization information in this box (if applicable)

Save Text | Delete Text

Go Back

Figure 2 Deviation Authorization screen. The Save Text button is circled.

3. Type in or copy and paste either one of the following into the text box (Figure 2):
   - Program Solicitation number, in the appropriate block on the Cover Sheet
   - Name and title of the NSF official who authorized the deviation and the date of authorization
4. Click the **Save Text** button (Figure 2). A screen displays (Figure 3) with a message that the Deviation Authorization has been saved.

Data for Deviation Authorization form saved.

OK

Figure 3 Screen with message that the text has been saved.

5. Click the **OK** button (Figure 3). The **Form Preparation** screen displays (Figure 1).

See also:

- Cover Sheet
- Table of Contents
- References Cited
- Budgets (Including Justification)
- Facilities, Equipment, and Other Resources
- List of Suggested Reviewers
- Additional Single Copy Documents
- Project Summary
- Project Description
- Biographical Sketches
- Current and Pending Support
- Supplementary Docs
- Add/Delete Non-Co-PI Senior Personnel

- Change PI
- Link Collaborative Proposals
- Proposal Classification Form

What Is the List of Suggested Reviewers?

Proposers may enter the names of reviewers whom you recommend as reviewers for the proposal. You may also enter the names of reviewers whom you recommend not review the proposal along with the reason why they should not. The *Proposal & Award Policies & Procedures Guide* (*PAPPG*) Exhibit II-2 contains information on conflicts of interest that may be useful in the preparation of this list.

Providing information for the List of Suggested Reviewers is optional.

Create a List of Suggested Reviewers

1. Access the **Form Preparation** screen (Figure 1) (see Create a New Proposal,or Edit a Proposal)

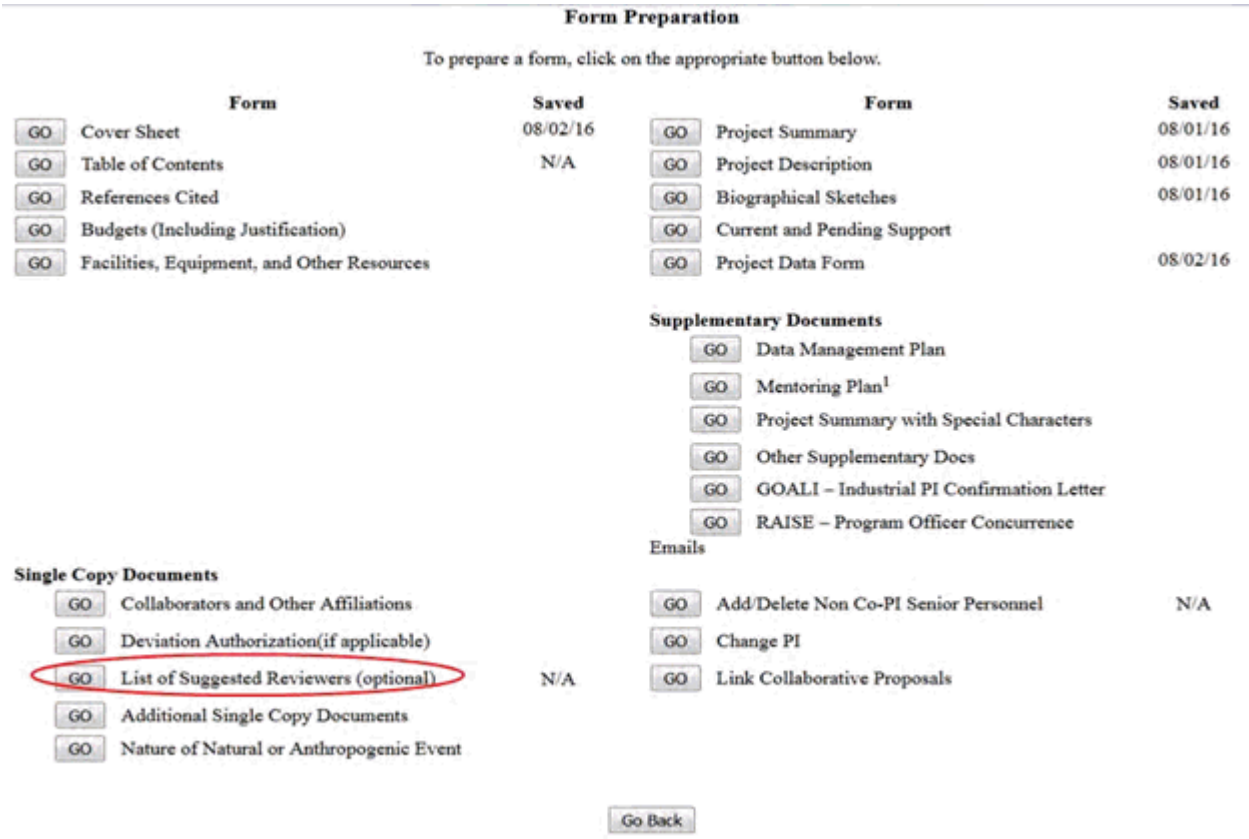


Figure 1 Form Preparations screen. The Go button for List of Suggested Reviewers is circled.

2. Click the **Go** button for **List of Suggested Reviewers** (Figure 1). The **List of Suggested Reviewers** screen displays (Figure 2).

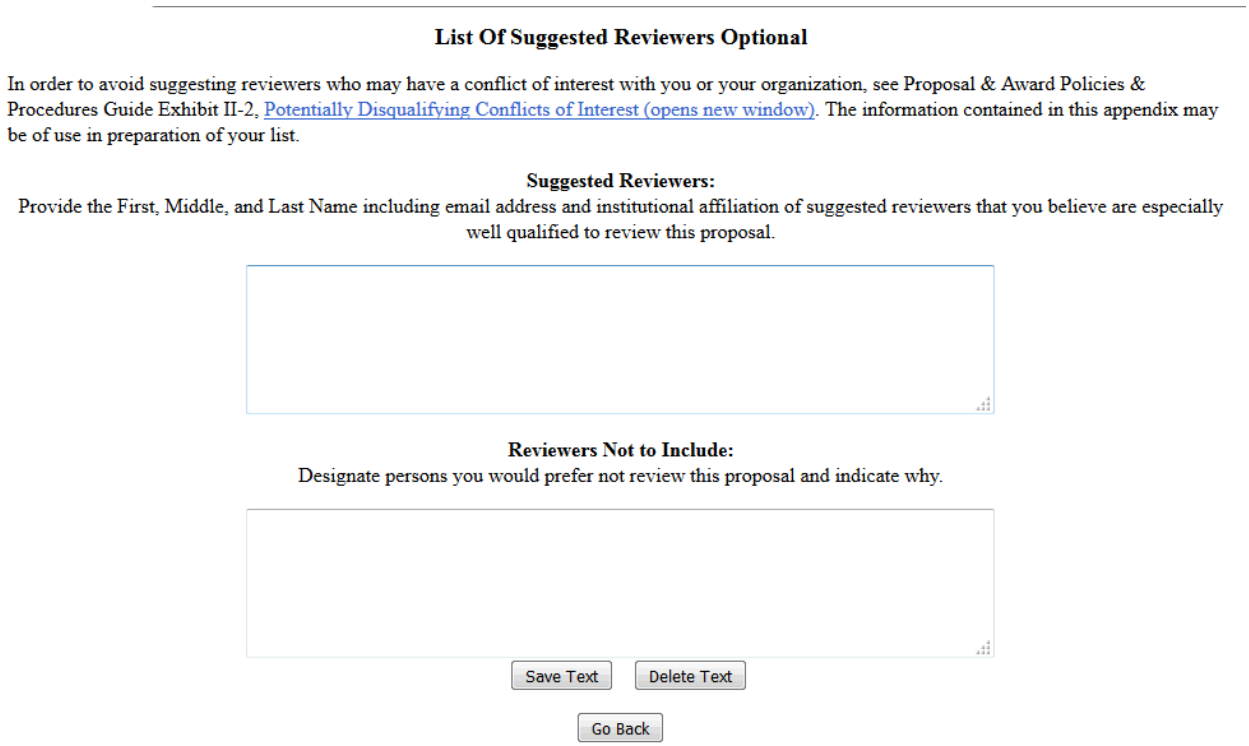


Figure 2 List of Suggested Reviewers screen. The Save Text button is circled.

3. **In the Suggested Reviewers** box (Figure 2), type in or copy and paste the first and last names and middle initials of those who you think are especially qualified to review the proposal (optional).
4. In the **Reviewers Not to Include** box (Figure 2), type in or copy and paste the names of those you think should not review the proposal and your reasons why (optional).
5. Click the **Save Text** button (Figure 2). A screen displays with a confirmation message that FastLane has saved the data.

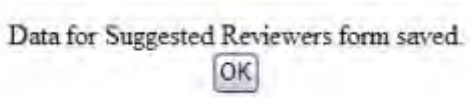


Figure 3 Screen with a message that the lists have been saved.

6. Click the **OK** button (Figure 3). The **Form Preparation** screen displays (Figure 1).

See also:

- Cover Sheet
- Table of Contents
- References Cited
- Budgets (Including Justification)
- Facilities, Equipment, and Other Resources
- Deviation Authorization
- Additional Single Copy Documents

- Project Summary
- Project Description
- Biographical Sketches
- Current and Pending Support
- Supplementary Docs
- Add/Delete Non-Co-PI Senior Personnel
- Change PI
- Link Collaborative Proposals
- Proposal Classification Form

Additional Single Copy Document

What Are Additional Single Copy Documents?

Additional single copy documents (PAPPG Chapter II.C) may be documents such as thefollowing:

- Collaborators and Other Affiliations Information (PAPPG ChapterII.C.1.e)
- Proprietary or Privileged Information included in your proposal as a separate statement (PAPPG Chapter II.D.1)
- Certification Regarding Lobbying (PAPPG Exhibit II-5)
- Confidential Budgetary Information (PAPPG Chapter II.C.2.g(i)(d)).
  - Nature of Natural or Anthropogenic Event (PAPPG Chapter I.F)

NSF does not give these documents to the reviewers of the proposal.

Information you enter here is not considered as part of the 15-page limit for the Project Description or as an appendix.

For instructions on how to upload single copy documents, see Work on Additional Single Copy Documents.

What Are Additional Single Copy Documents?

Additional single copy documents (PAPPG Chapter II.C) may be documents such as thefollowing:

- Collaborators and Other Affiliations Information (PAPPG ChapterII.C.1.e)
- Proprietary or Privileged Information included in your proposal as a separate statement (PAPPG Chapter II.D.1)
- Certification Regarding Lobbying (PAPPG Exhibit II-5)
- Confidential Budgetary Information (PAPPG Chapter II.C.2.g(i)(d)).
  - Nature of Natural or Anthropogenic Event (PAPPG Chapter I.F)

NSF does not give these documents to the reviewers of the proposal.

Information you enter here is not considered as part of the 15-page limit for the Project Description or as an appendix.

For instructions on how to upload single copy documents, see Work on Additional Single Copy Documents.

Work on Additional Single Copy Documents

1. Access the **Form Preparation** screen (Figure 1) (see Create a New Proposal,or Edit a Proposal)

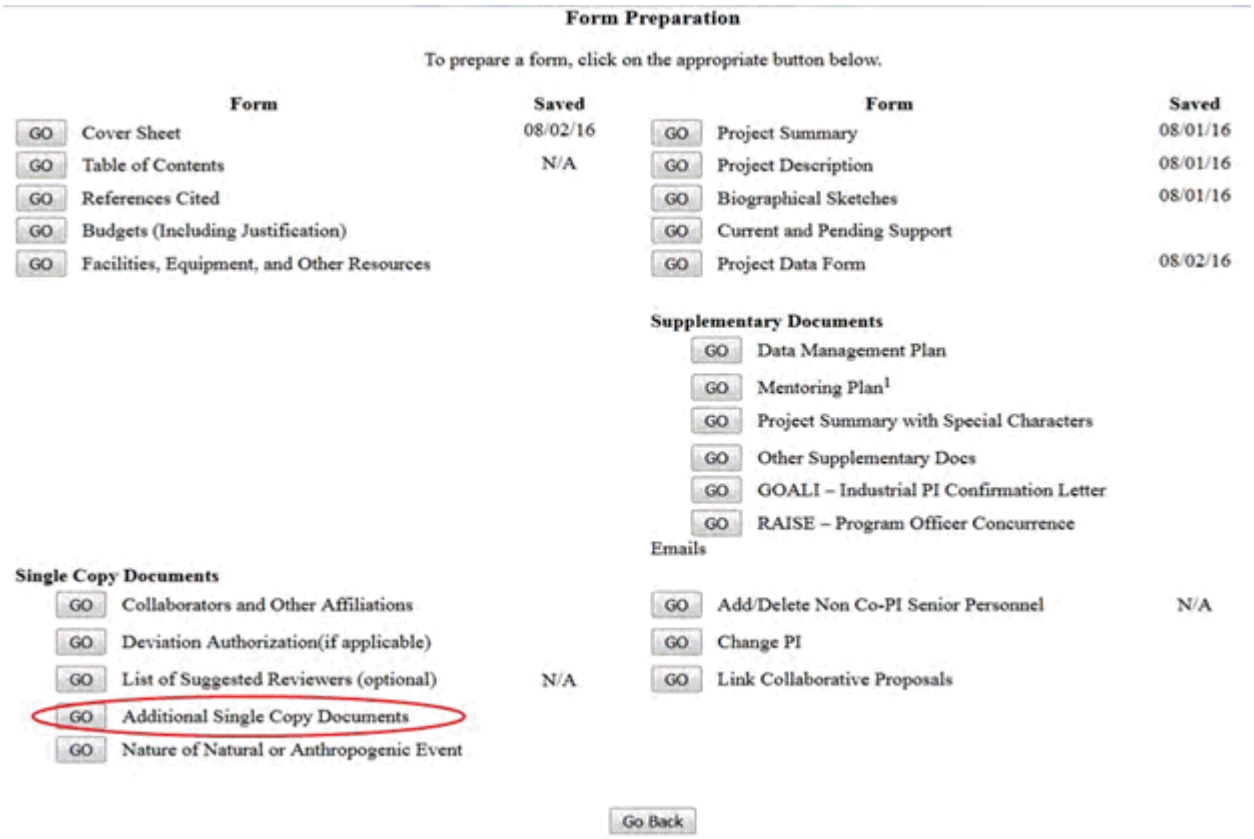


Figure 1 Form Preparation screen. The Go button for Additional Single Copy Documents is circled.

2. Click the **Go** button next to Additional Single Copy Documents (Figure 1). The **Additional Single Copy Documents** screen displays (Figure 2).

Figure 2 Additional Single Copy screen.

You have these options for submitting an Additional Single Copy Document:

- Enter an Additional Single Copy Document in the text box
- Upload an Additional Single Copy Document

See also:

- Cover Sheet
- Table of Contents
- References Cited
- Budgets (Including Justification)
- Facilities, Equipment, and Other Resources
- Deviation Authorization
- List of Suggested Reviewers
- Project Summary
- Project Description
- Biographical Sketches
- Current and Pending Support
- Supplementary Docs
- Add/Delete Non-Co-PI Senior Personnel
- Change PI
- Link Collaborative Proposals
- Proposal Classification Form

Enter an Additional Single Copy Document in the Text Box

1. Access the **Additional Single Copy Documents** screen (Figure 1) (see Work on Additional Single Copy Documents).

Figure 1 Additional Single Copy screen. The Save Text button is circled.

2. Type in or copy and paste the Additional Single Copy Document in the text box (Figure 1).
3. Click the **Save Text** button (Figure 1). A screen displays with a message that the Additional Single Copy Document data is saved.

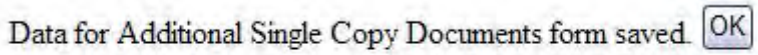


Figure 2 Screen with the message that the Additional Single Copy Document data is saved.

4. Click the **OK** button (Figure 2). The **Form Preparation** screen displays.

Upload an Additional Single Copy Document

1. Prepare a word-processing document for the Additional Single Copy Document. See Acceptable Formats for FastLane to see a listing of the many formats FastLane accepts.
2. Access the **Additional Single Copy Documents** screen (Figure 1) (see Work on Additional Single Copy Documents).

Figure 1 Additional Single Copy screen. The Transfer File button is circled.

3. Click the **Transfer File** button (Figure 1). The **Supplementary Document File Upload** screen displays (Figure 2). See Upload a File for directions.

Figure 2 Additional Single Copy Documents File Upload screen.

If an Additional Single Copy Document has already been uploaded, when you click the ***Go*** *button for Additional Single Copy Documents on the* ***Form Preparation*** *screen,* the **Additional Single Copy Documents File Upload** screen displays (Figure 3).

Figure 3 Additional Single Copy Documents File Upload screen after a file has been uploaded.

This screen gives you these options:

- Display Current Single Copy Documents
- Delete Current Single Copy Documents
- Upload a Single Copy Document

Note: Uploading a new Single Copy Document will not result in deleting a previously uploaded file.

Display Current Single Copy Documents

1. Highlight the Additional Single Copy Document you want to view from the **Current Documents to Display** list (Figure 3).
2. Click the **Display Current Additional Single Copy Documents** button (Figure 3). The file displays in PDF format. If you need to download Adobe Reader, see Adobe Reader for FastLane.

Delete Current Single Copy Documents

1. Highlight the Additional Single Copy Document you want to delete from the **Current Documents to Delete** list (Figure 3).
2. Click the **Delete Current Additional Single Copy Documents** button (Figure 3). A screen displays with a message for you to confirm that you want to delete the file.
3. Click the **OK** button. The **Form Preparation** screen displays.

Upload a Single Copy Document

Follow the directions in Upload a File. Uploading a new file will not replace any previously uploaded files.

Enter a New Supplementary Document in the Text Box

If an Additional Single Copy Document has already been uploaded and you want to write a new Additional Single Copy Document in the text box, do the following:

1. Highlight all the documents in the **Current Documents to Delete** list (Figure 3).
2. Click the **Delete Current Additional Single Copy Document** button (Figure 3). A screen displays with a message for you to confirm that you want to delete the file.
3. Click the **OK** button.
4. Return to the **Form Preparation** screen.
5. Click the **Go** button for Additional Single Copy Document. The **Additional Single Copy Document** screen displays with the text box. See Enter an Additional Single Copy Document in the Text Box.

Project Summary

What Is the Project Summary?

TheProject Summary consists of an overview, a statement on the intellectual merit of the proposed activity, and a statement on the broader impacts of the proposed activity. Consult the *Proposal & Award Policies & Procedures Guide (PAPPG) Chapter II.C.2.b* for afull description.

Work on the Project Summary

1. Access the **Form Preparation** screen (Figure 1) (see Create a New Proposal,OR Edit a Proposal,).You have these options:

- Enter the Project Summary in the text boxes
- Only if special characters are required, upload the Project Summary as a Supplementary Document

   a. Enter the Project Summary in the text boxes: This option should be used in most cases. If your Project Summary requires the use of special characters, see Upload the Project Summary as a Supplementary Document.

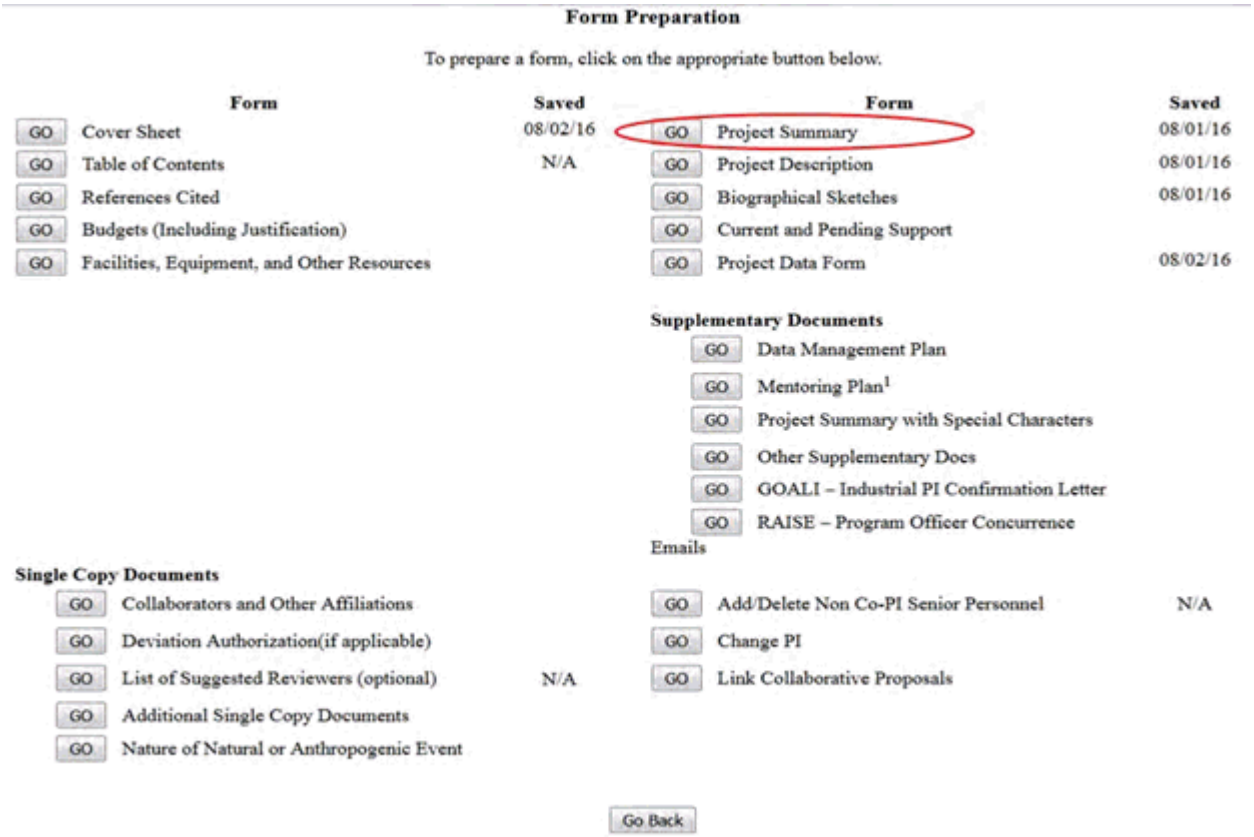


Figure 1 Form Preparation screen. The Go button for Project Summary is circled.

2. Click the **Go** button for Project Summary (Figure 1). See Enter the Project Summary in the Text Boxes.

Project Summary

*Instructions for Preparation of the Project Summary in FastLane

Each proposal must contain a summary of the proposed project not more than one page in length. The Project Summary consists of an overview, a statement on the intellectual merit of the proposed activity, and a statement on the broader impacts of the proposed activity.

The overview includes a description of the activity that would result if the proposal were funded and a statement of objectives and methods to be employed. The statement on intellectual merit should describe the potential of the proposed activity to advance knowledge. The statement on broader impacts should describe the potential of the proposed activity to benefit society and contribute to the achievement of specific, desired societal outcomes. The Project Summary should be written in the third person, informative to other persons working in the same or related fields, and, insofar as possible, understandable to a scientifically or technically literate lay reader. It should not be an abstract of the proposal.

Proposals that do not contain the Project Summary, including an overview and separate statements on intellectual merit and broader impacts, will not be accepted or will be returned without review.

What should I enter in each of the three text boxes?

Overview: Insert a self-contained description of the activity that would result if the proposal were funded and include a statement of objectives and methods to be employed.

Intellectual Merit: Describe the potential of the proposed activity to meet the Intellectual Merit criterion

Broader Impacts: Describe the potential of the proposed activity to meet the Broader Impacts criterion

Information must be entered into all three text boxes, or the proposal will not be accepted.

What is the limit on the total number of characters allowed for the Project Summary (i.e., the sum of the three boxes)?

Project Summary should be limited to 1 page in length. Please ensure that the Project Summary is limited to 1 page prior to submission.

What should I do if I have to use "special characters" ?

Most proposers will not need to use special characters, e.g., mathematical symbols or Greek letters. If special characters are required, then upload the Project Summary as a Supplementary Document and check the box to indicate this. The Project Summary may ONLY be uploaded as a Supplementary Document if the use of special characters is required. **Project Summaries submitted as a PDF must be formatted with separate headings for the overview, statement on the intellectual merit of the proposed activity, and statement on the broader impacts of the proposed activity. Failure to include these headings may result in the proposal being returned without review.**

Figure 2 Project Summary Preparation Instructions screen.

See:

- Upload the Project Summary with Special Characters

See also:

- Cover Sheet
- Table of Contents
- References Cited
- Budgets (Including Justification)
- Facilities, Equipment, and Other Resources
- Deviation Authorization
- List of Suggested Reviewers
- Additional Single Copy Documents
- Project Description
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Work on the Project Summary

1. Access the **Form Preparation** screen (Figure 1) (see Create a New Proposal,OR Edit a Proposal,).You have these options:

- Enter the Project Summary in the text boxes
- Only if special characters are required, upload the Project Summary as a Supplementary Document
    a. Enter the Project Summary in the text boxes: This option should be used in most cases. If your Project Summary requires the use of special characters, see Upload the Project Summary as a Supplementary Document.

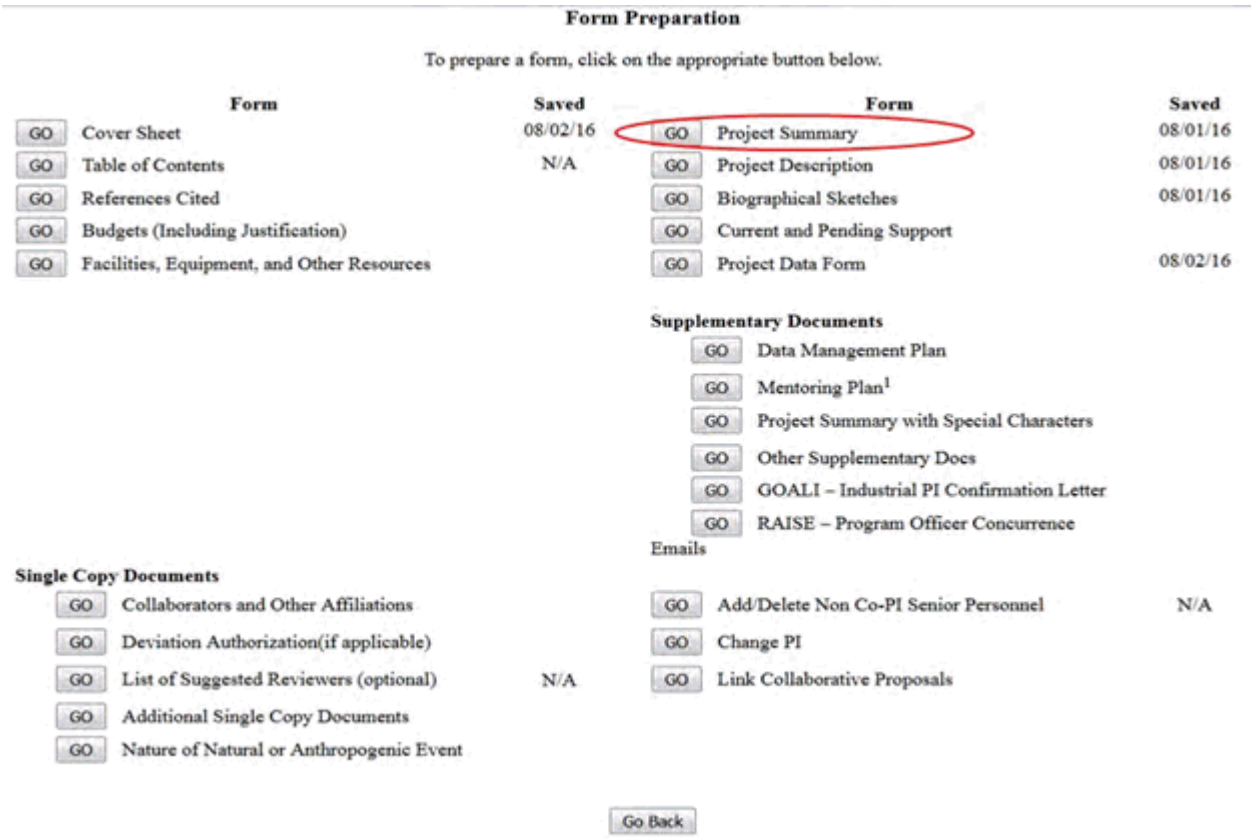

Figure 1 Form Preparation screen. The Go button for Project Summary is circled.

2. Click the **Go** button for Project Summary (Figure 1). See Enter the Project Summary in the Text Boxes.

Project Summary

*Instructions for Preparation of the Project Summary in FastLane

Each proposal must contain a summary of the proposed project not more than one page in length. The Project Summary consists of an overview, a statement on the intellectual merit of the proposed activity, and a statement on the broader impacts of the proposed activity.

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Figure 2 Project Summary Preparation Instructions screen.

See:

- Upload the Project Summary with Special Characters

See also:

- Cover Sheet
- Table of Contents
- References Cited
- Budgets (Including Justification)
- Facilities, Equipment, and Other Resources
- Deviation Authorization
- List of Suggested Reviewers
- Additional Single Copy Documents
- Project Description
- Biographical Sketches
- Current and Pending Support
- Supplementary Docs
- Add/Delete Non-Co-PI Senior Personnel
- Change PI
- Link Collaborative Proposals
- Proposal Classification Form

Enter the Project Summary in the Text Boxes

1. Access the **Project Summary** screen (Figure 1) (see Work on the Project Summary).

Project Summary
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Figure 1 Project Summary screen.

2. Type in or copy and paste the Project Summary in the boxes, per the instructions displayed on screen. (Figure 1).
3. Click the **Save Text** button. A screen displays (Figure 2) with a confirmation message that the Project Summary data is saved.

Data for Project Summary form saved. OK

Figure 2 Screen with the message that the Project Summary has been saved.

4. Click the **OK** button (Figure 2). The **Form Preparation** screen displays (Figure 1).

Upload the Project Summary with Special Characters

1. Access the **Project Summary** screen (Figure 1) (see Work on the Project Summary).

Project Summary

*Instructions for Preparation of the Project Summary in FastLane

Each proposal must contain a summary of the proposed project not more than one page in length. The Project Summary consists of an overview, a statement on the intellectual merit of the proposed activity, and a statement on the broader impacts of the proposed activity.

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Figure 1 Project Summary screen. The check box for a Project Summary uploaded as a Supplementary Document is circled.

2. If the Project Summary requires the use of special characters, then click the checkbox on this screen next to the sentence, "Check here if your Project Summary is uploaded as a Supplementary Document." Proceed to the **Form Preparation** screen, Supplementary Documents section to upload the **Project Summary with Special Characters** (Figure 2).

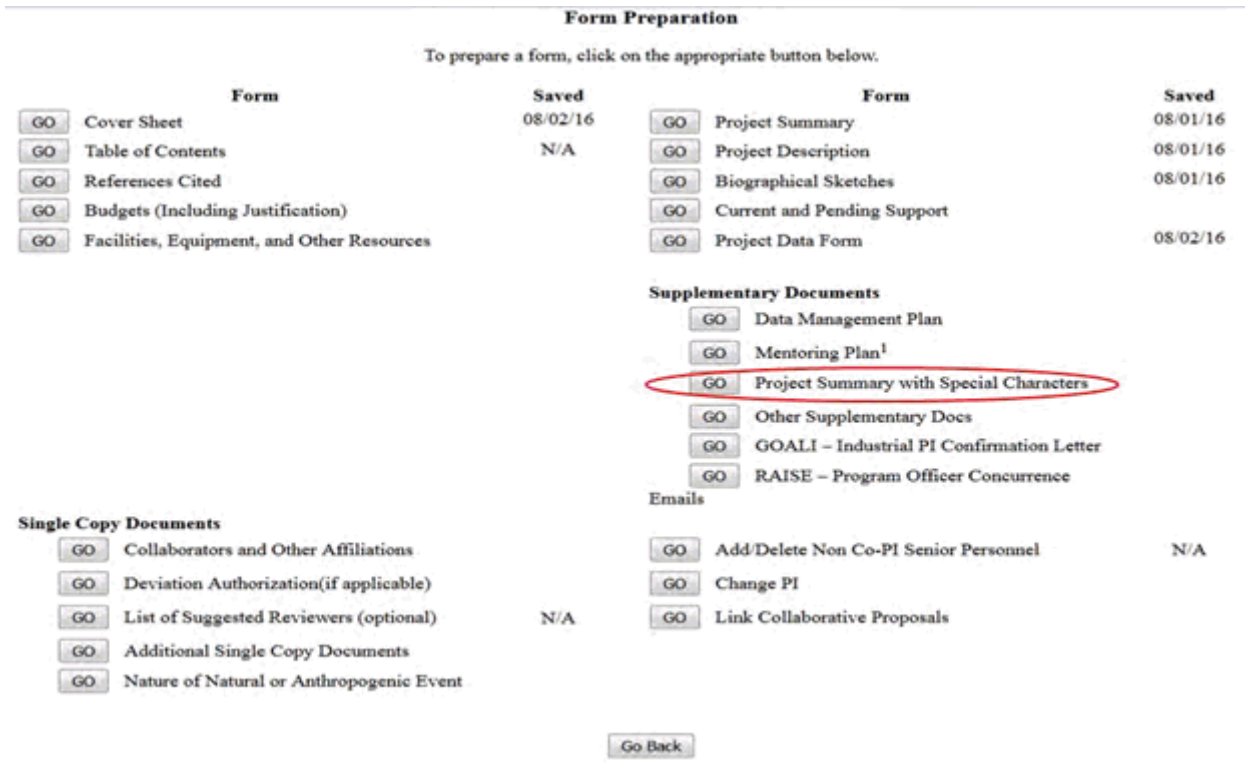

Figure 2 The Form Preparation screen. Project Summary with Special Characters is circled.

3. Click on the **Go** button for the Project Summary with Special Characters on the **Form Preparation** screen. The **Project Summary with Special Characters File Upload** screen displays (Figure 2). See Upload a File for directions.

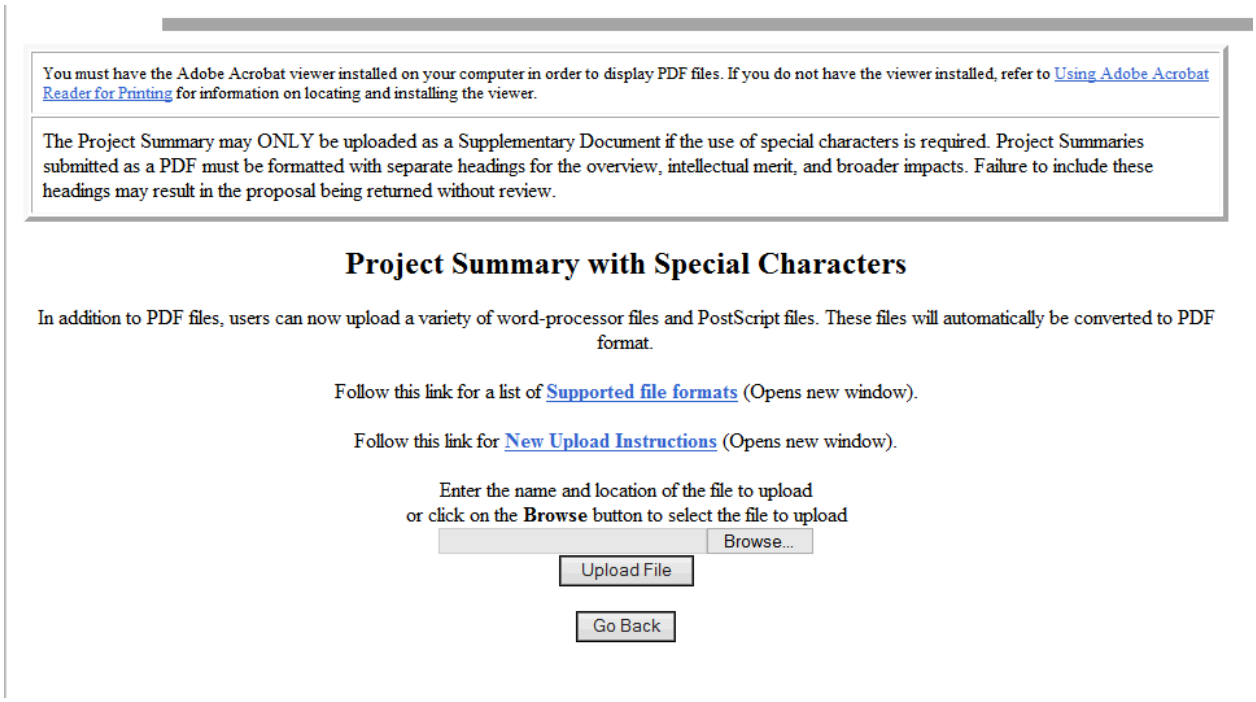

Figure 3 Project Summary with Special Characters File Upload screen.

If a Project Summary has already been uploaded, when you click the **Go** button for Project Summary with Special Characters on the **Form Preparation** screen, the **Project Summary with Special Characters File Upload** screen displays as in Figure 3 with these options:

- Display Current Project Summary with Special Characters
- Delete Current Project Summary with Special Characters
- Upload a New Project Summary with Special Characters (This option automatically replaces the already uploaded file.)

Display Current Project Summary with Special Characters

Click the **Display Current Project Summary with Special Characters** button (Figure 3). The previously uploaded Project Summary with Special Characters displays in PDF format. If you need to download Adobe Reader, see Adobe Reader for FastLane.

Delete Current Project Summary with Special Characters

Click the **Delete Current Project Summary with Special Characters** button (Figure 3). A screen displays with a message for you to confirm that you want to delete the file. Click the **OK** button. The **Form Preparation** screen displays.

Upload a New Project Summary with Special Characters

Follow the directions in Upload a File. Uploading a new Project Summary with Special Characters automatically replaces the previous one.

Enter a New Project Summary in the Text Boxes

If a Project Summary with Special Characters has already been uploaded and you want to enter a new Project Summary in the text boxes, do the following:

1. Click the **Delete Current Project Summary with Special Characters** button (Figure 3). A screen displays with a message for you to confirm that you want to delete the file.
2. Click the **OK** button. The **Project Summary with Special Characters File Upload** screen displays (Figure 4).
3. Return to the **Form Preparation** screen.
4. Click the **Go** button next to Project Summary. The **Project Summary** screen displays with the text boxes (Figure 1). Uncheck the checkbox next to the sentence, "Check here if your Project Summary is uploaded as a Supplementary Document." See Enter the Project Summary in the Text Boxes

What Is the Project Description?

The Project Description is a clear statement of the work you propose to undertake. Consult the *Proposal & Award Policies & Procedures Guide (PAPPG) Chapter II.C.2.d* for a full description.

The Project Description should outline the general plan of work and the broad design of the proposed activities.

The Project Description *must* include:

- Objectives for the period of the proposed work and expected significance
- The proposed activities' relation to:
  - Longer-term goals of the project
  - The present state of knowledge in the field
  - The PI's work in progress under other support
  - Work in progress elsewhere

Where appropriate, clearly describe experimental methods and procedures.

Proposers should address:

- what they want to do;
- why they want to do it;
- how they plan to do it;
- how they will know if they succeed; and
- what benefits could accrue if the project is successful.

The project activities may be based on previously established and/or innovative methods and approaches, but in either case must be well-justified. These issues apply to both the technical aspects of the proposal and the way in which the project may make broader contributions.

It *must* contain, as a separate section within the narrative, a discussion of the broader impacts of the proposed activities. Broader impacts may be accomplished through the research itself, through the activities that are directly related to specific research projects, or through activities that are supported by, but are complementary to, the project. NSF values the advancement of scientific knowledge and activities that contribute to the

achievement of societally relevant outcomes. Such outcomes include, but are not limited to: full participation of women, persons with disabilities, and underrepresented minorities in science, technology, engineering, and mathematics (STEM); improved STEM education and educator development at any level; increased public scientific literacy and public engagement with science and technology; improved well-being of individuals in society; development of a diverse, globally competitive STEM workforce; increased partnerships between academia, industry, and others; improved national security; increased economic competitiveness of the United States; and enhanced infrastructure for research and education.

If any PI or co-PI identified on the project has received any NSF support (including current funding) with a start date in the past five years, information on the award(s) is required. See *PAPPGChapter II.C.2.d(iii)* for further instructions on Results from Prior NSF Support.

Work on the Project Description

1. Prepare a word-processing document with the Project Description. See Acceptable Formats for FastLane to see all the formats that FastLane can accept.
2. Access the **Form Preparation** screen (Figure 1) (see Create a New Proposal, or Edit a Proposal).

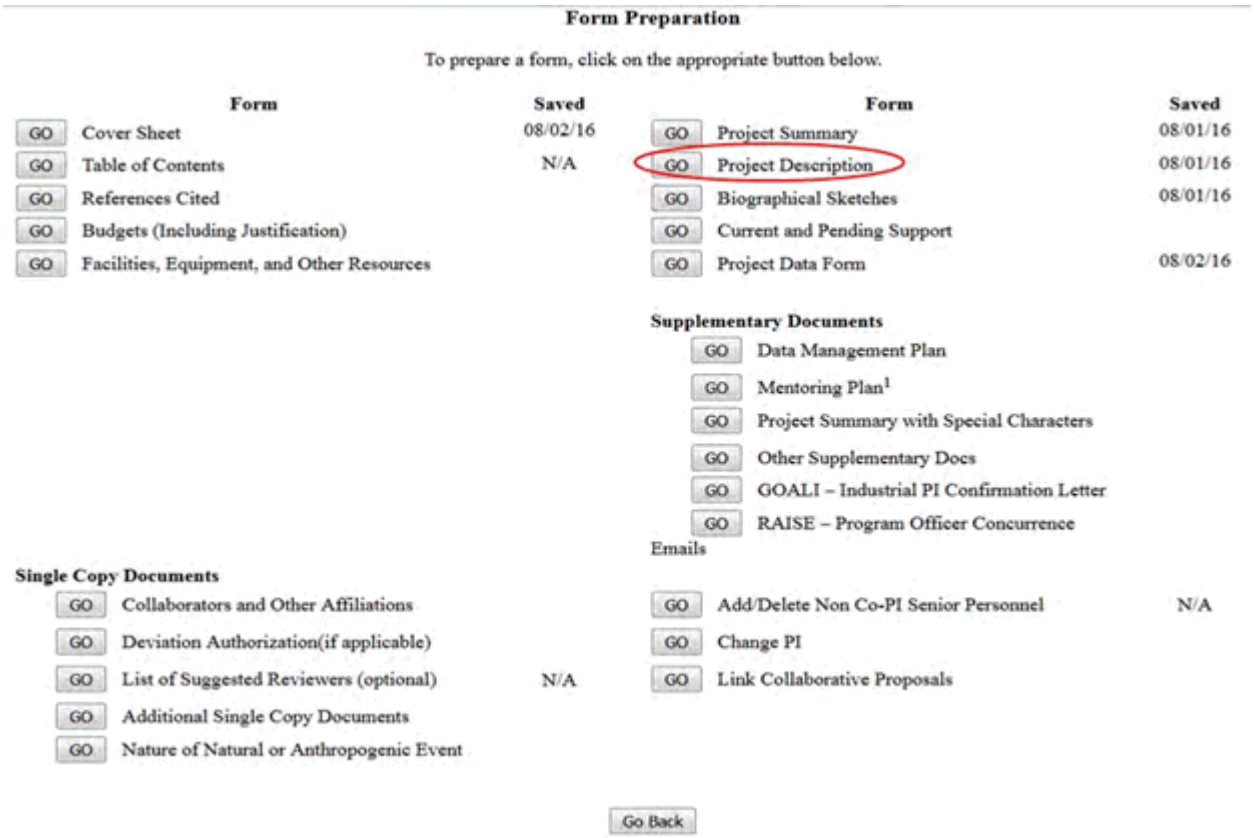

Figure 1 Form Preparation screen. The Go button for Project Description is circled.

3. Click the **Go** button for Project Description (Figure 1). The **Project Description File Upload** screen displays (Figure 2).

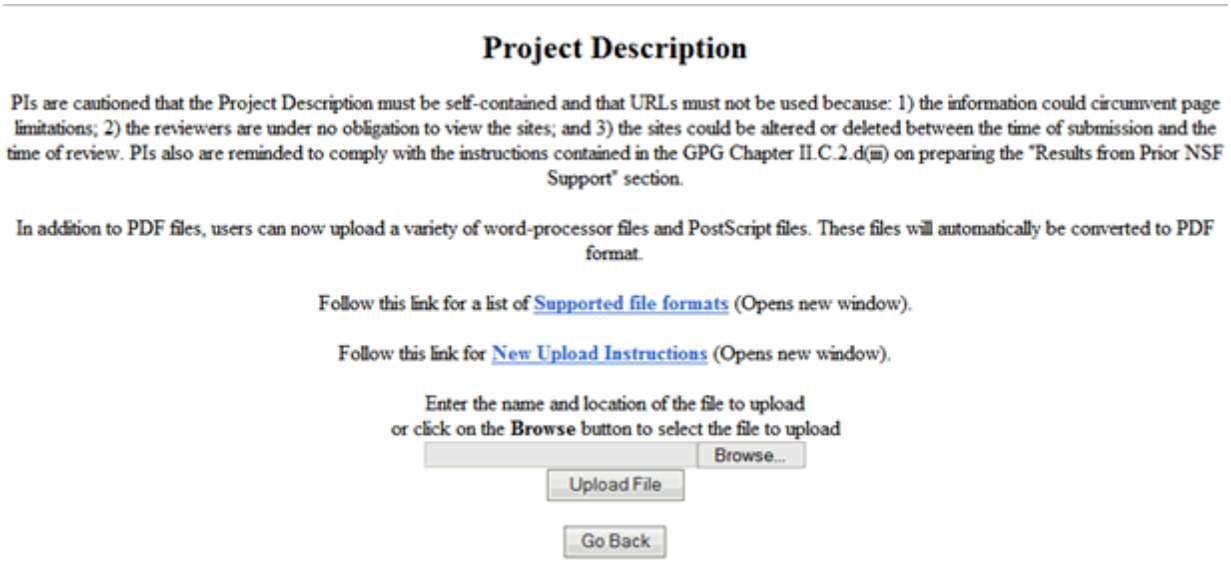

Figure 2 Project Description File Upload screen.

4. Upload the Project Description. See Upload a File for instructions.

When you have accepted the upload, the **Project Description File Upload** screen displays (Figure 3) with these options:

- Display Current Project Description
- Delete Current Project Description
- Upload a New Project Description (This option automatically replaces the already uploaded file.)

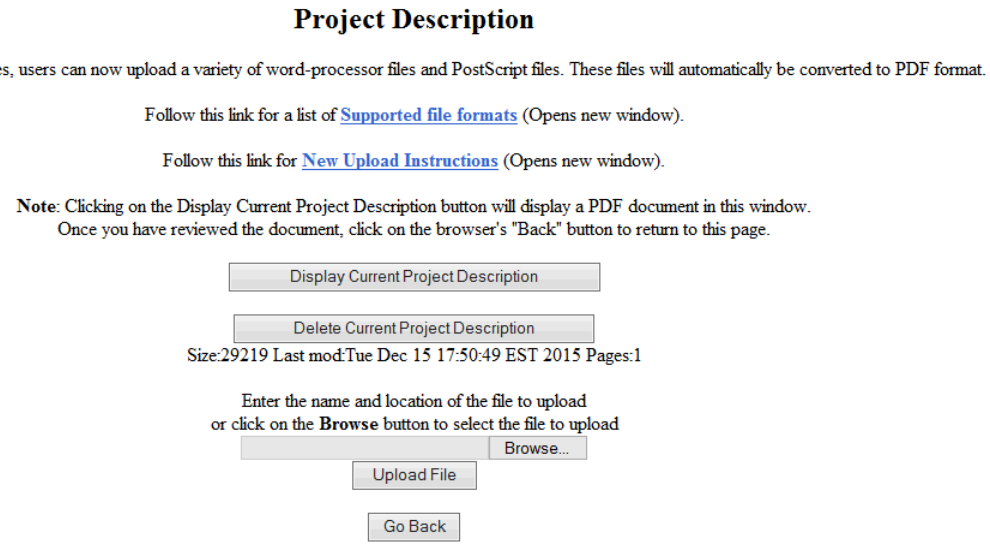

Figure 3 Project Description Upload screen after a document has been uploaded.

Display Current Project Description

Click the **Display Current Project Description** button (Figure 3). The file displays in PDF format. If you need to download Adobe Reader, see Adobe Reader for FastLane.

Delete Current Project Description

1. Click the **Delete Current Project Description** button (Figure 3). A screen displays with a message for you to confirm that you want to delete the file.
2. Click the **OK** button. The **Form Preparation** screen displays.

Upload a New Project Description

Follow the directions in Upload a File. Uploading a new Project Description automatically replaces the file that was previously uploaded.

See also:

- Cover Sheet
- Table of Contents
- References Cited
- Budgets (Including Justification)
- Facilities, Equipment, and Other Resources
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- List of Suggested Reviewers
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- Biographical Sketches
- Current and Pending Support
- Supplementary Docs
- Add/Delete Non-Co-PI Senior Personnel
- Change PI
- Link Collaborative Proposals
- Proposal Classification Form

Biographical Sketches

What Are Biographical Sketches?

A Biographical Sketch is required for all Senior Personnel and each individual's biographical sketch must be uploaded as a PDF file. This information must be separately provided for each individual identified as senior project personnel. Consult the *Proposal & Award Policies & Procedures Guide (PAPPG) Chapter II.C.2.f*, for a full description of a Biographical Sketch.

Work on Biographical Sketches

1. Access the **Form Preparation** screen (Figure 1) (see Create a New Proposal or Edit a Proposal,).

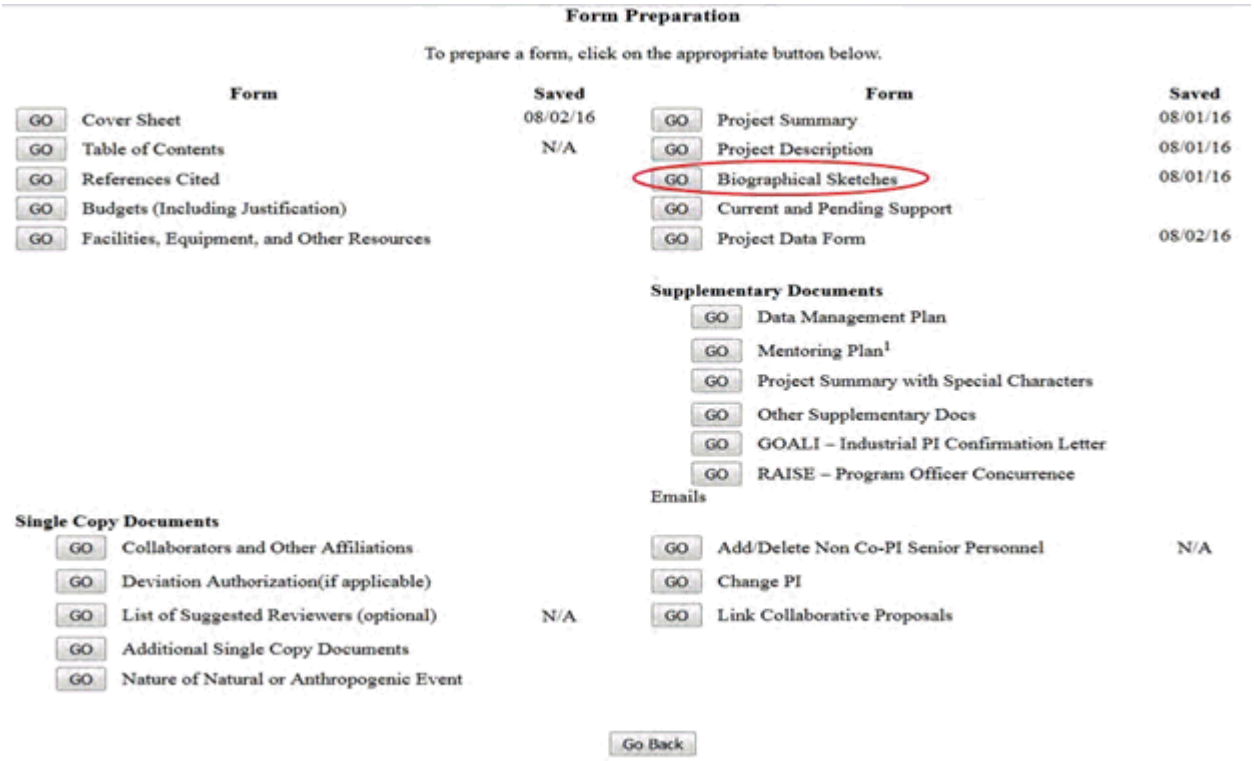


Figure 1 Form Preparation screen. Select the Biographical Sketches Go button.

2. Click the **Go** button for Biographical Sketches (Figure 1). The **Personnel Assigned** screen displays (Figure 2). This screen shows all people assigned to the proposal. To the right of the individual's name is the status of the Biographical Sketch:
   - **Nothing** if no Sketch has yet been entered
   - **Text** and number of characters if a Sketch was entered in the text box
   - **PDF** and number of pages if a Sketch was uploaded as a file

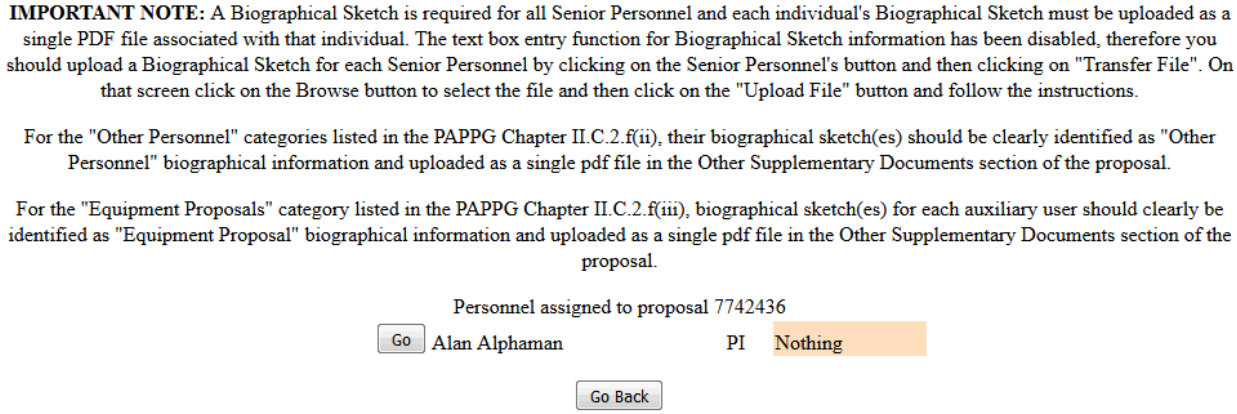


Figure 2 Assigned Personnel screen.

If an individual assigned to the proposal is not listed:

1. Return to the **Form Preparation** screen (Figure 1).
2. Click the **Go** button for Add/Delete Senior Personnel to add the person's name to the proposal (see Add/Delete Non-Co-PI Senior Personnel for instructions).

From the **Assigned Personnel** screen (Figure 2), you have to:

- Submit each Biographical Sketch separately

See also:

- Cover Sheet
- Table of Contents
- References Cited
- Budgets (Including Justification)
- Facilities, Equipment, and Other Resources
- Deviation Authorization
- List of Suggested Reviewers
- Additional Single Copy Documents
- Project Summary
- Project Description
- Current and Pending Support
- Supplementary Docs
- Add/Delete Non-Co-PI Senior Personnel
- Change PI
- Link Collaborative Proposals
- Proposal Classification Form

What Are Biographical Sketches?

A Biographical Sketch is required for all Senior Personnel and each individual's biographical sketch must be uploaded as a PDF file. This information must be separately provided for each individual identified as senior project personnel. Consult the *Proposal & Award Policies & Procedures Guide (PAPPG) Chapter II.C.2.f*, for a full description of a Biographical Sketch.

Work on Biographical Sketches

1. Access the **Form Preparation** screen (Figure 1) (see Create a New Proposal or Edit a Proposal,).

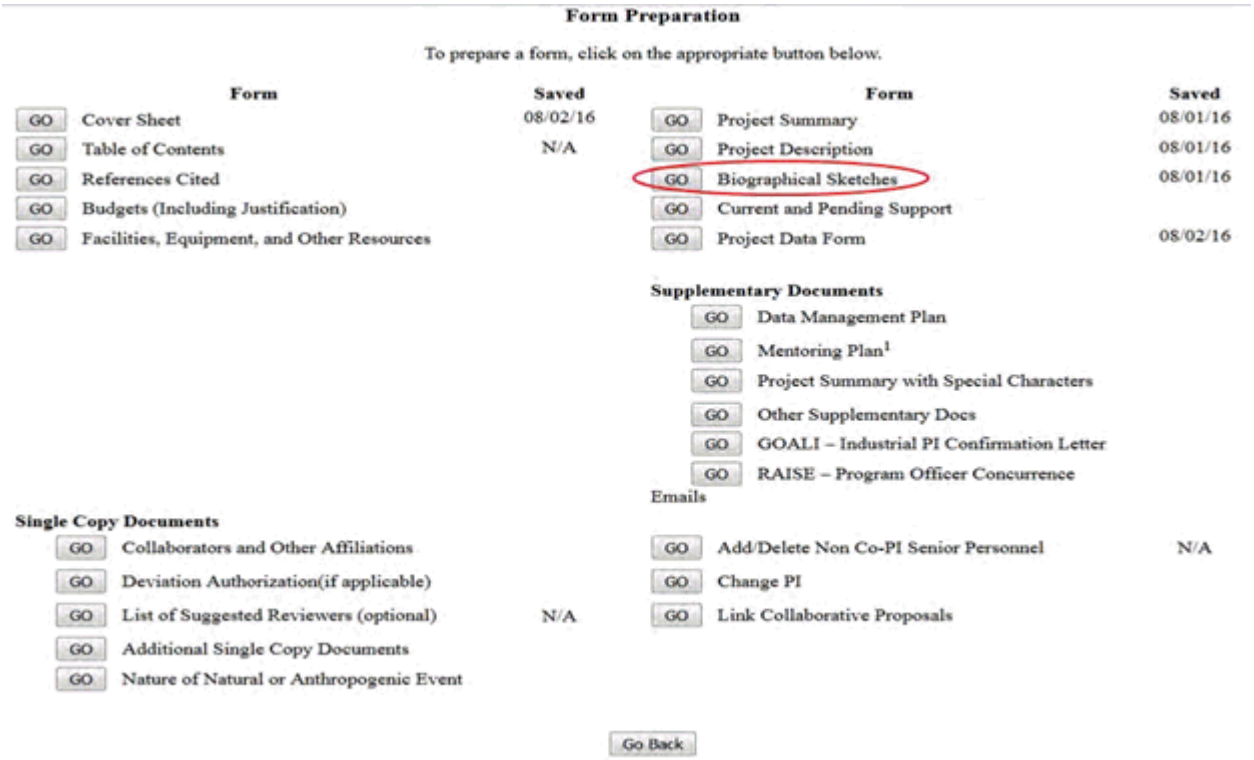


Figure 1 Form Preparation screen. Select the Biographical Sketches Go button.

2. Click the **Go** button for Biographical Sketches (Figure 1). The **Personnel Assigned** screen displays (Figure 2). This screen shows all people assigned to the proposal. To the right of the individual's name is the status of the Biographical Sketch:
   - **Nothing** if no Sketch has yet been entered
   - **Text** and number of characters if a Sketch was entered in the text box
   - **PDF** and number of pages if a Sketch was uploaded as a file

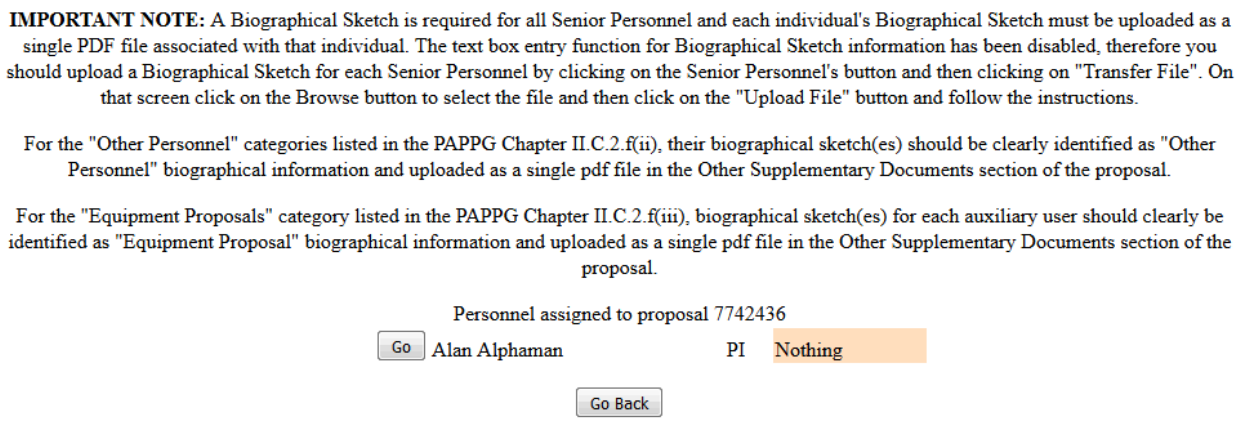


Figure 2 Assigned Personnel screen.

If an individual assigned to the proposal is not listed:

1. Return to the **Form Preparation** screen (Figure 1).
2. Click the **Go** button for Add/Delete Senior Personnel to add the person's name to the proposal (see Add/Delete Non-Co-PI Senior Personnel for instructions).

From the **Assigned Personnel** screen (Figure 2), you have to:

- Submit each Biographical Sketch separately

See also:

- Cover Sheet
- Table of Contents
- References Cited
- Budgets (Including Justification)
- Facilities, Equipment, and Other Resources
- Deviation Authorization
- List of Suggested Reviewers
- Additional Single Copy Documents
- Project Summary
- Project Description
- Current and Pending Support
- Supplementary Docs
- Add/Delete Non-Co-PI Senior Personnel
- Change PI
- Link Collaborative Proposals
- Proposal Classification Form

Submit Each Biographical Sketch Separately

1. Access the **Assigned Personnel** screen (Figure 1) (see Work on Biographical Sketches).

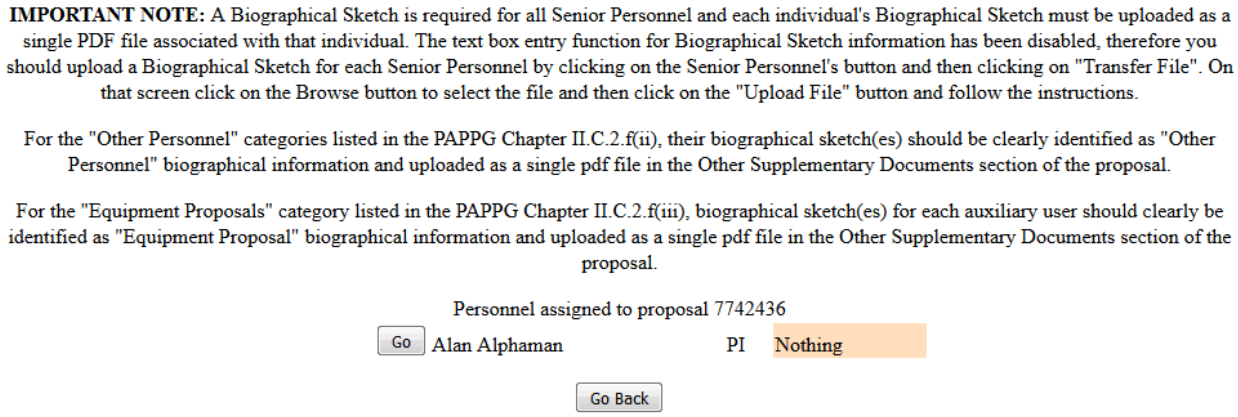


Figure 1 Assigned Personnel screen. The Go button for a Senior Person is circled.

2. Click the **Go** button next to the name of the person whose Biographical Sketch you are submitting. The **Biographical Sketch** screen provides the option to upload a Biographical Sketch

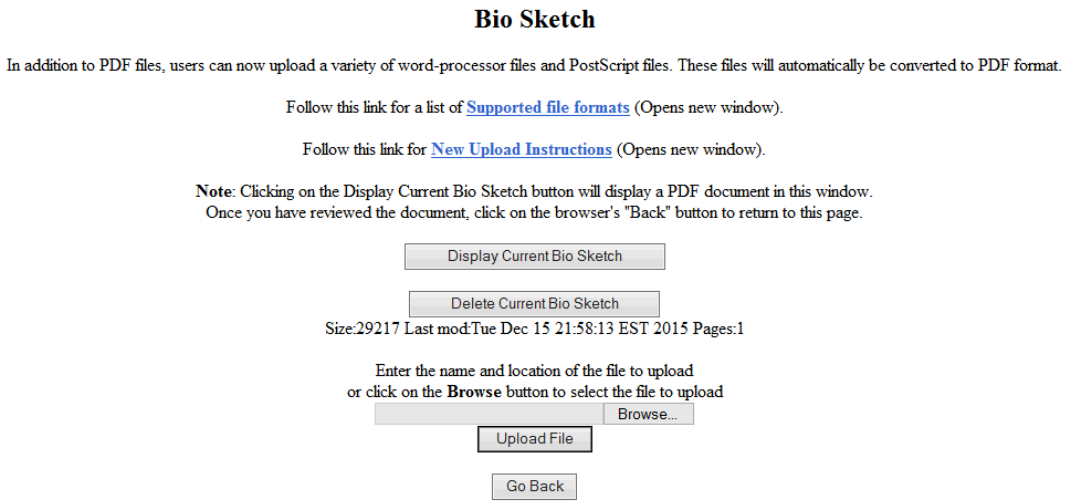


Figure 2 Bio Sketch File Upload screen after a Sketch has been uploaded.

Upload the Biographical Sketch

1. Access the **Biographical Sketch** screen (Figure 1) (see Submit Each Biographical Sketch Separately).

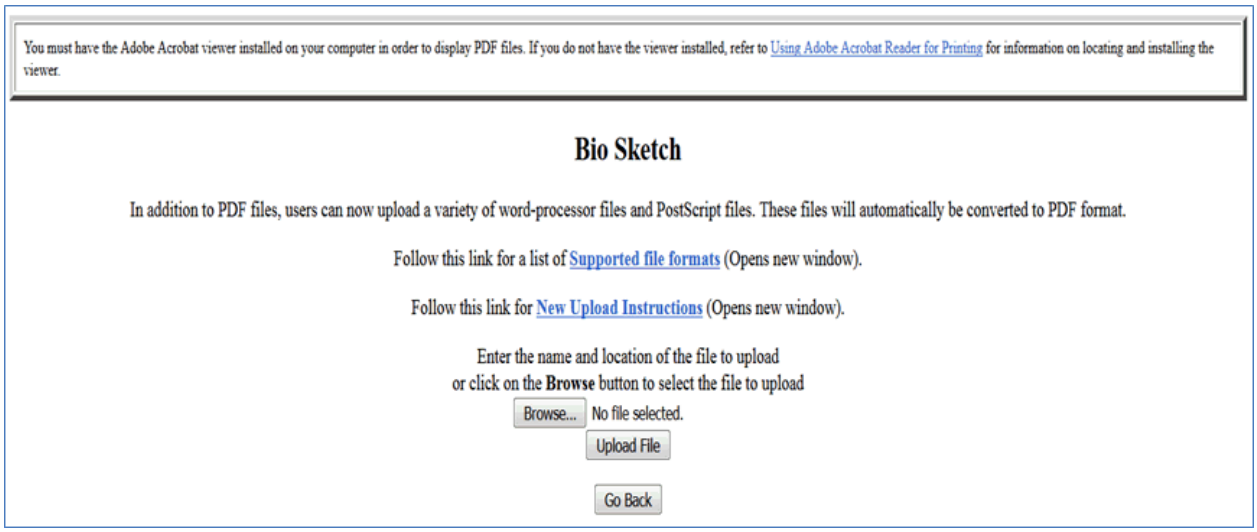


Figure 1 Biographical Sketch screen. Select the 'Browse' and then the 'Upload' button

2. Click the **Transfer File** button (Figure 1). The **Bio Sketch File Upload** screen displays (Figure 2). See Upload a File for directions.

When you have accepted the upload, the **Bio Sketch File Upload** screen displays (Figure 2) with these new options:
1. Display Current Bio Sketch
2. Delete Current Bio Sketch

Figure 2 Bio Sketch File Upload screen after a Sketch has been uploaded.

Current and Pending Support

What Is Current and Pending Support?

NSF requires that you submit information on any current and pending support for the project and proposals, including this project, and any subsequent funding for continuing grants. All current project support from whatever source (e.g. Federal, State, local or foreign government agencies, public or private foundations, industrial or other commercial organizations, or internal funds allocated toward specific projects) must be listed, in accordance with PAPPG Chapter II.C.2.h

Work on Current and Pending Support

1. Access the **Form Preparation** screen (Figure 1) (see Create a New Proposal,or Edit a Proposal).

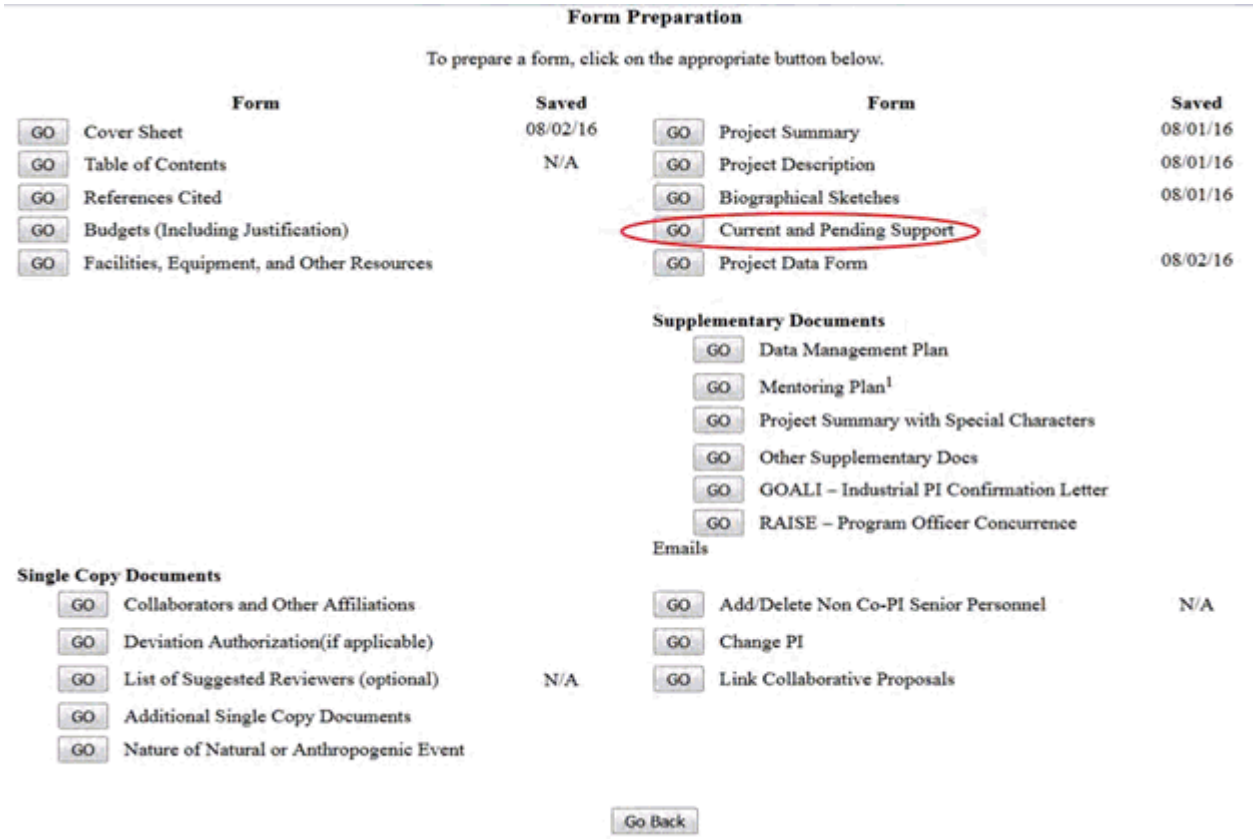


Figure 1 Form Preparation screen. Select the Go button for Current and Pending Support.

2. On the **Form Preparation** screen (Figure 1), click the **Go** button for Current and Pending Support (Figure 1). The **Current and Pending Support** screen displays (Figure 2). The right side of the screen lists the PI, Co-PIs, and other Senior Personnel assigned to the proposal. You must report on current and pending support for each individual listed.

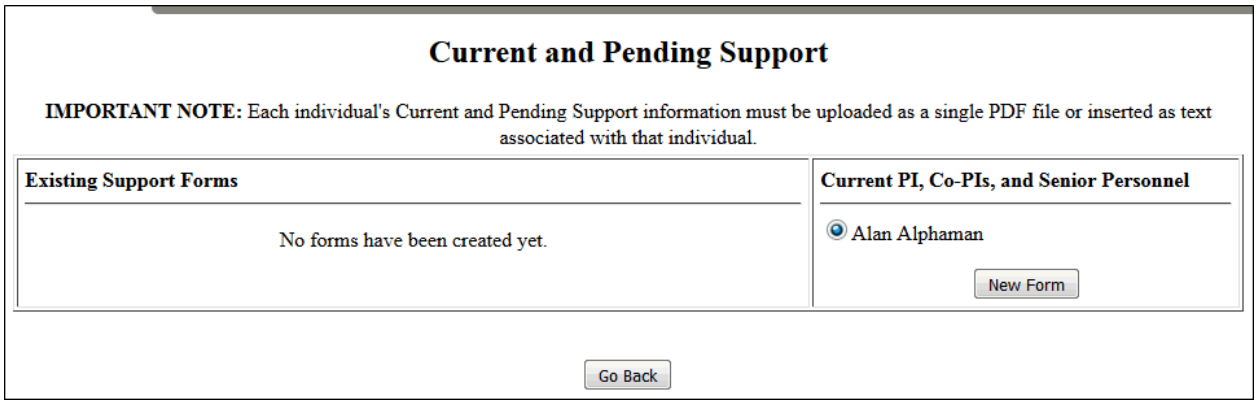


Figure 2 Upper portion of the Current and Pending Support form screen.

You have these options for submitting Current and Pending Support:

- Upload a single file for all Current and Pending Support information for all the individuals
- Submit Current and Pending Support information for each individual separately

See also:

- Cover Sheet
- Table of Contents
- References Cited
- Budgets (Including Justification)
- Facilities, Equipment, and Other Resources
- Deviation Authorization
- List of Suggested Reviewers
- Additional Single Copy Documents
- Project Summary
- Project Description
- Biographical Sketches
- Supplementary Docs
- Add/Delete Non-Co-PI Senior Personnel
- Change PI
- Link Collaborative Proposals
- Proposal Classification Form

What Is Current and Pending Support?

NSF requires that you submit information on any current and pending support for the project and proposals, including this project, and any subsequent funding for continuing grants. All current project support from whatever source (e.g. Federal, State, local or foreign government agencies, public or private foundations, industrial or other commercial organizations, or internal funds allocated toward specific projects) must be listed, in accordance with PAPPG Chapter II.C.2.h

Work on Current and Pending Support

1. Access the **Form Preparation** screen (Figure 1) (see Create a New Proposal,or Edit a Proposal).

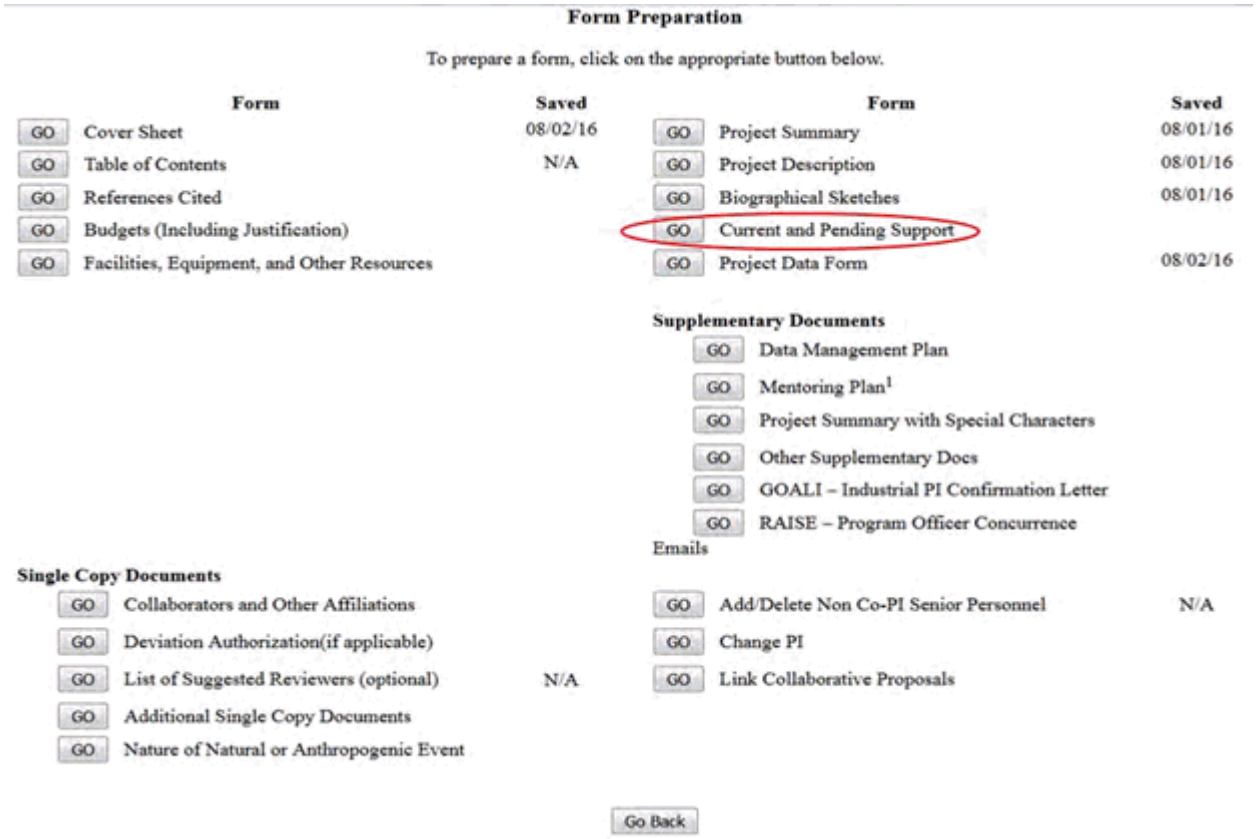


Figure 1 Form Preparation screen. Select the Go button for Current and Pending Support.

2. On the **Form Preparation** screen (Figure 1), click the **Go** button for Current and Pending Support (Figure 1). The **Current and Pending Support** screen displays (Figure 2). The right side of the screen lists the PI, Co-PIs, and other Senior Personnel assigned to the proposal. You must report on current and pending support for each individual listed.

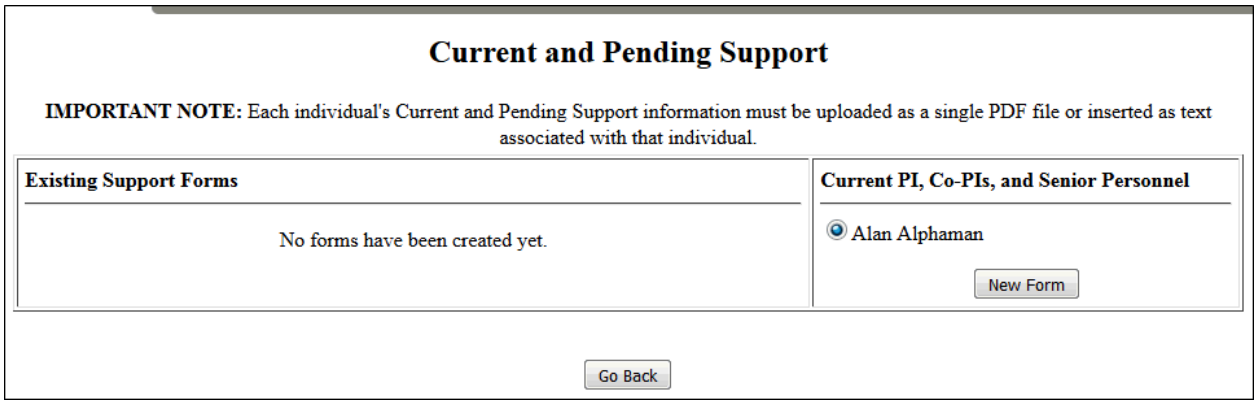


Figure 2 Upper portion of the Current and Pending Support form screen.

You have these options for submitting Current and Pending Support:

- Upload a single file for all Current and Pending Support information for all the individuals
- Submit Current and Pending Support information for each individual separately

See also:

- Cover Sheet
- Table of Contents
- References Cited
- Budgets (Including Justification)
- Facilities, Equipment, and Other Resources
- Deviation Authorization
- List of Suggested Reviewers
- Additional Single Copy Documents
- Project Summary
- Project Description
- Biographical Sketches
- Supplementary Docs
- Add/Delete Non-Co-PI Senior Personnel
- Change PI
- Link Collaborative Proposals
- Proposal Classification Form

Submit Current and Pending Support for Each Individual Separately

1. Access the **Current and Pending Support** screen (Figure 1) (see Work on Current and Pending Support).

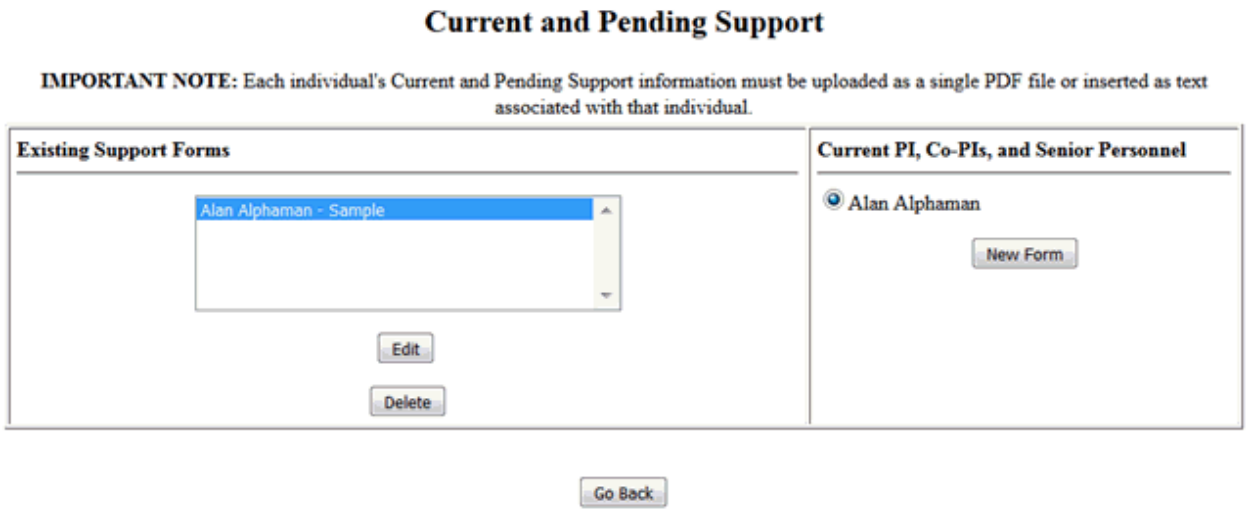


Figure 1 Current and Pending Support form screen. The New Form button is circled.

2. Click the radio button for the person whose support you want to report (Figure 1).

3. Click the **New Form** button (Figure 1). The **Current and Pending Support Form** screen displays (Figure 2). You have two options for submitting the report:
   - Enter the information on the Current and Pending Support form
   - Upload a file with all the Current and Pending Support information for that individual

Figure 2 Current and Pending Support form for a Senior Person.

Enter the Information in the Current and Pending Support Form

1. Access the **Current and Pending Support Form** screen (Figure 1) (see Submit Current and Pending for Each Individual Support Separately).

Figure 1 Current and Pending Support Form screen for a Senior Person. The Save Text button is circled.

2. In the **Project Proposal Title** box (Figure 1), type the proposal title.
3. In the **Source of Support** box (Figure 1), type the source of support.
4. In the **Project Location** box (Figure 1), type the location of the project.
5. In the **Total Award Amount** (Figure 1), type the total amount of the award (no dollar sign, no commas).
6. In the **Start Date** box (Figure 1), type the start date (in mm/dd/yyyy format).
7. In the **End Date** box (Figure 1), type the end date (in mm/dd/yyyy format).
8. Under **Support Type** (Figure 1), click the radio button for the type of support.
9. Under **Person-Months Per Year Committed to the Project** (Figure 1), type the Calendar months, the Academic months, and the Summer months in the boxes.
10. Click the **Save Text** button (Figure 1). A screen displays (Figure 2) with confirmation that FastLane has saved the data.

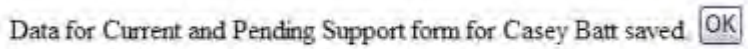


Figure 2 Screen with the message that the data has been saved.

11. Click the **OK** button (Figure 2). **The Current and Pending Support** screen displays (Figure 3) with the report listed in the **Existing Support Forms** section.

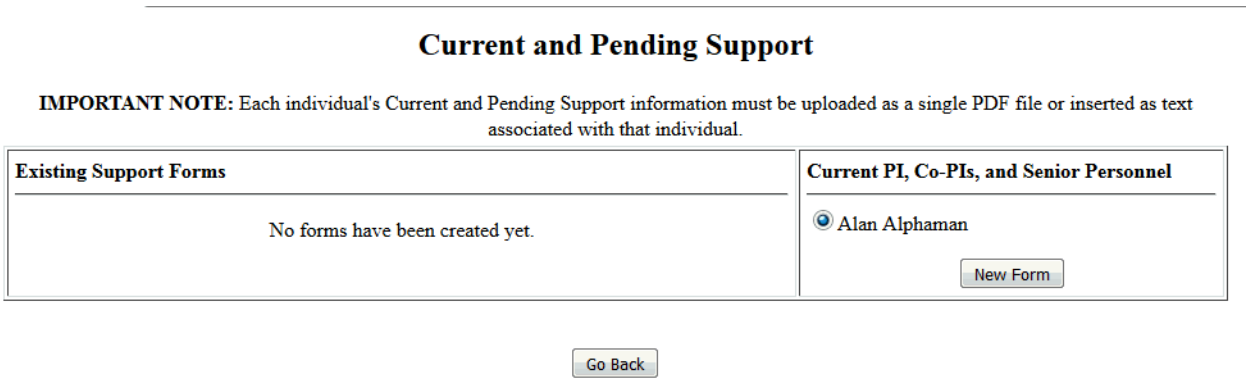


Figure 3 Current and Pending Support screen with the report for a Senior Person highlighted under Existing Support Forms.

12. Repeat the process for each project that a listed individual is involved in.

Edit a Current and Pending Support Form

1. Access the **Current and Pending Support** screen (Figure 1) (see Work on Current and Pending Support).

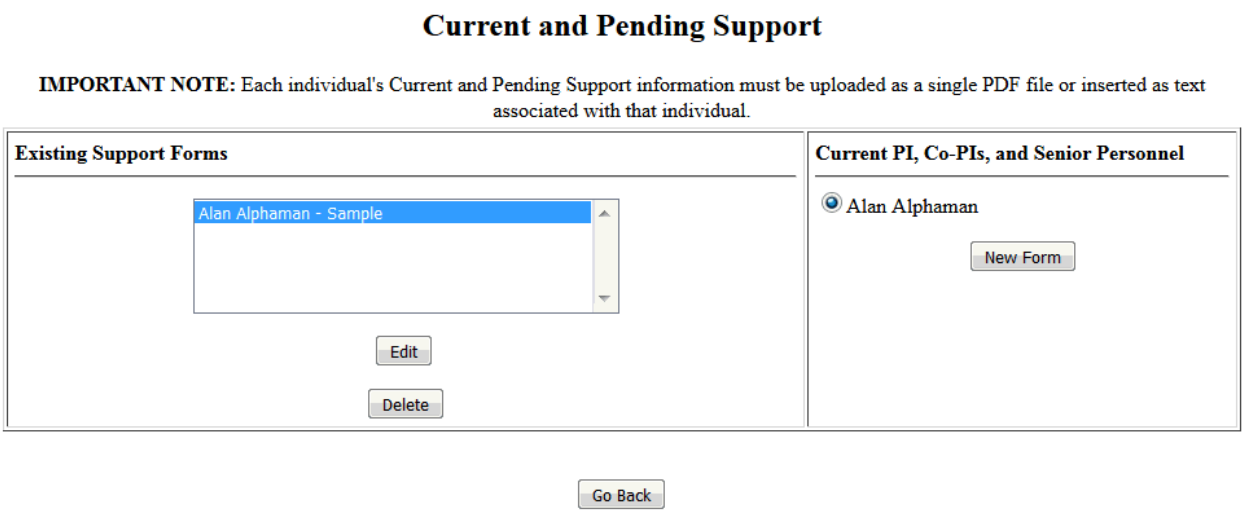


Figure 1 Current and Pending Support screen. The Edit button is circled.

2. In the **Existing Support Forms** section (Figure 1), highlight the report that you want to edit that was entered in the **Current and Pending Support Form** screen (Project Title).
3. Click the **Edit** button (Figure 1). The **Current and Pending Support Form** screen displays (Figure 2).

Figure 2 Current and Pending Support Form screen. The Save Text button is circled.

4. Edit the report as you require (Figure 2).
5. Click the **Save Text** button (Figure 2). A screen displays (Figure 3) with confirmation that FastLane has saved the data.

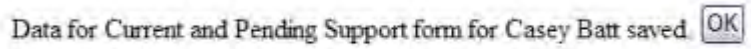


Figure 3 Screen with the message that the data has been saved.

6. Click the **OK** button (Figure 3). **The Current and Pending Support** screen displays (Figure 1).

Upload a File with Current and Pending Support for an Individual

1. Create a word-processing document that lists the current and pending support by project/proposal for an individual (see Acceptable Formats for FastLane for a listing of all the formats FastLane accepts). We encourage you to report using these fields for each project/proposal for a person:
   - Project/proposal title
   - Source of support
   - Project location
   - Total award amount
   - Starting date
   - Ending date
   - Support type—current, pending, submission planned in near future, or transfer of support
   - Person-months per year committed to the project—calendar, academic, and summer

2. Access the **Current and Pending Support** screen (Figure 1) (see Work on Current and Pending Support).

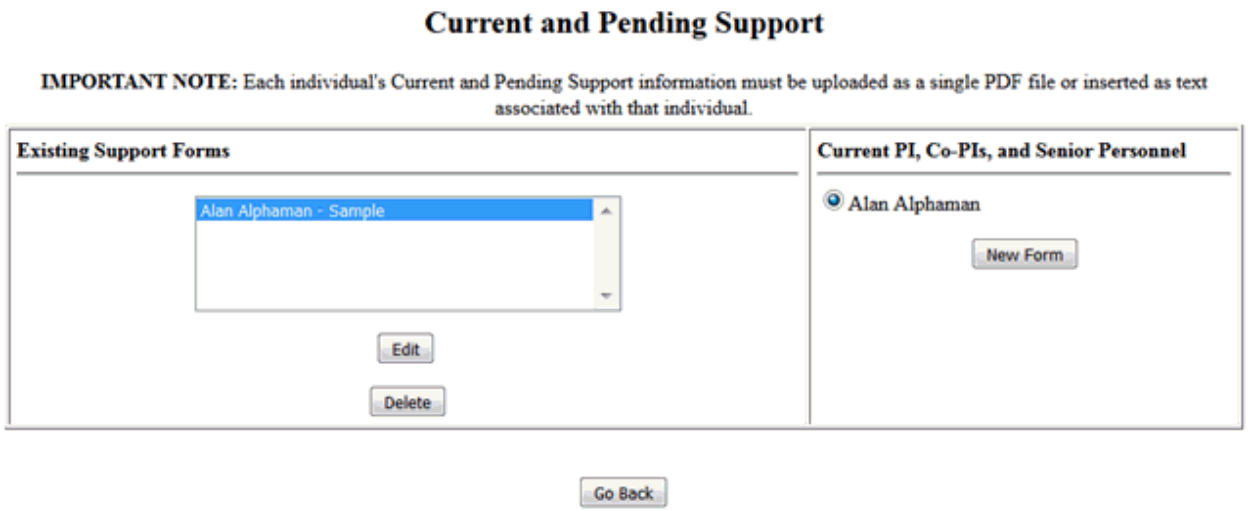


Figure 1 Current and Pending Support screen. The New Form button is circled.

3. In the **Current PI, Co-PIs, and Senior Personnel** section (Figure 1), click the radio button for the individual's name.
4. Click the **New Form** button (Figure 1). The **Current and Pending Support Form** screen displays (Figure 2).

Figure 2 Current and Pending Support Form screen. The Transfer File button is circled.

5. Click the **Transfer File** button (Figure 2). The **Current and Pending Support File Upload** screen displays (Figure 3).

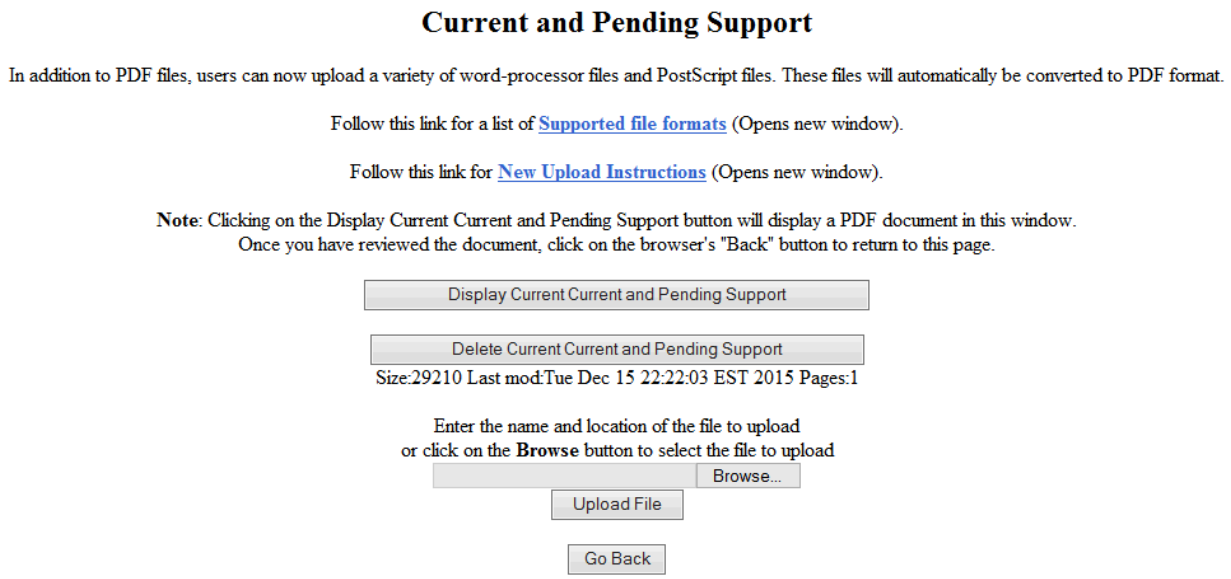


Figure 3 Current and Pending Support File Upload screen.

6. Upload the file. See Upload a File for directions.

When you have accepted the upload, the **Current and Pending Support File Upload** screen displays (Figure 4) with these new options:

- Display Current Current and Pending Support
- Delete Current Current and Pending Support

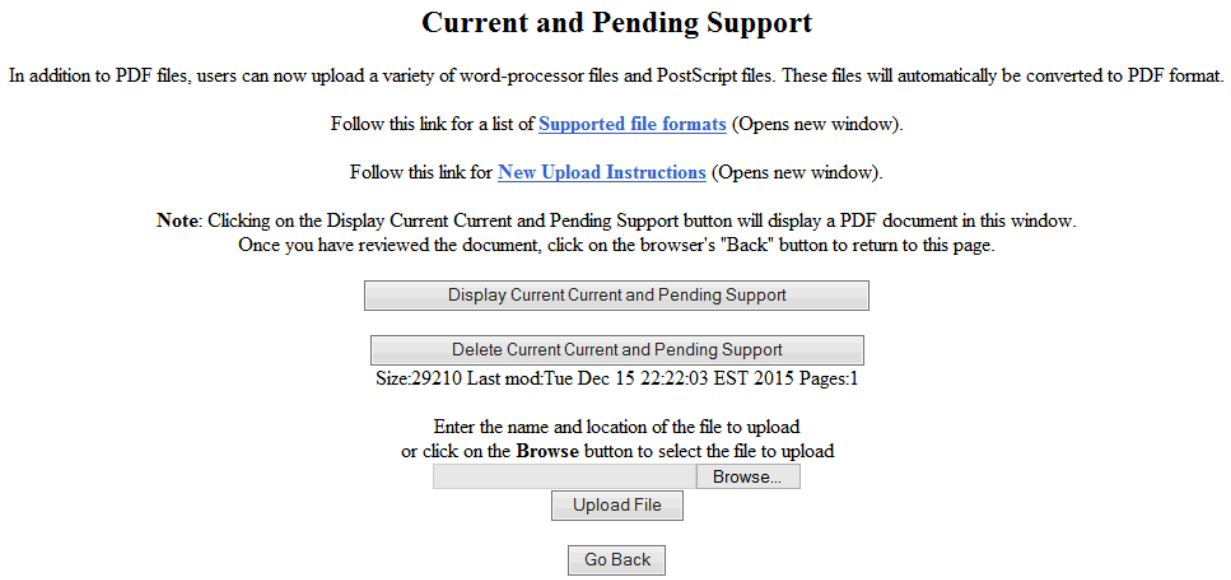


Figure 4 Current and Pending Support File Upload screen with options to Display and Delete current files.

Display Current Current and Pending Support

Click the **Display Current Current and Pending Support** button (Figure 4). The previously uploaded file displays in PDF format. If you need to download Adobe Reader, see Adobe Reader for FastLane.

Delete Current Current and Pending Support

1. Click the **Delete Current Current and Pending Support** button (Figure 4). A screen displays with a message for you to confirm that you want to delete the file.
2. Click the **OK** button. The **Form Preparation** screen displays.

To change the report, you have these options:

- Upload a new file, which will automatically delete the old file
- Delete the file and enter the information on the **Current and Pending Support Form** screen (see Enter the Information in the Current and Pending Support Form).

Edit an Uploaded Current and Pending Support Form

1. On a word-processor, edit the document that you originally uploaded.
2. Access the **Current and Pending Support** screen (Figure 1) (see Work on Current and Pending Support).

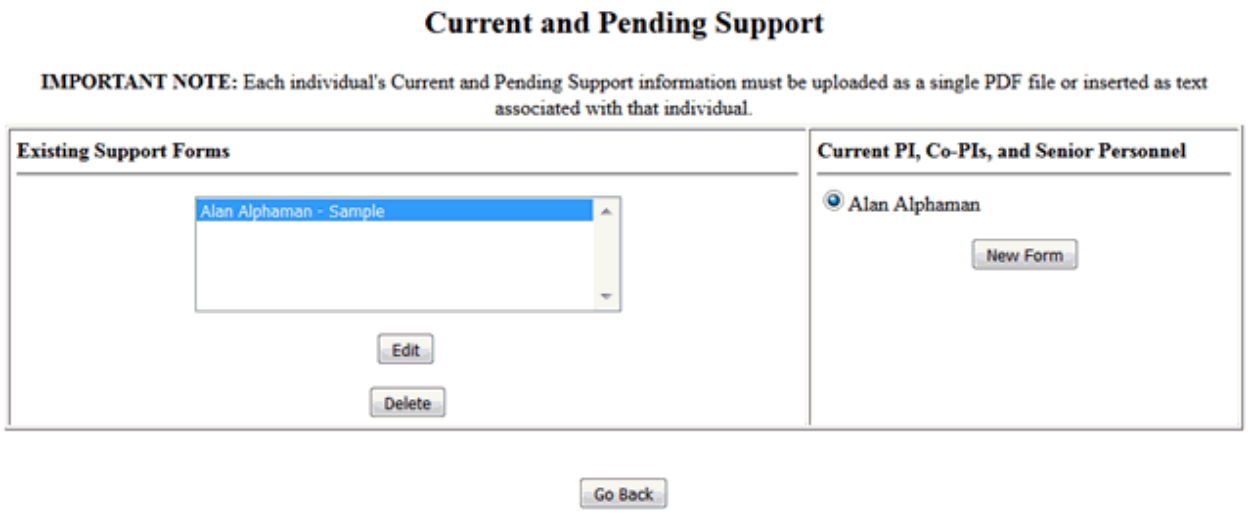


Figure 1 Current and Pending Support screen. The Edit button is circled.

3. In the **Existing Support Forms** section (Figure 1), highlight the uploaded report you want to edit (PDF File).
4. Click the **Edit** button (Figure 1). The **Current and Pending Support File Upload** screen displays (Figure 2).

Figure 2 Current and Pending Support File Upload screen.

5. Upload the edited document. See Upload a File. This will automatically replace the original document with the edited document.

Supplementary Documents

What Are Supplementary Documents?

This area allows for entering Mentoring Plans and Other Supplementary Documents that either your Sponsored Projects Office or the *Proposal & Award Policies & Procedures Guide (PAPPG)* specifies for the proposal. Each proposal that requests funding to support postdoctoral researchers must include, as a supplementary document, a description of the mentoring activities that will be provided for such individuals. If a Postdoctoral Researcher Mentoring Plan is required, FastLane will not permit submission of a proposal if the Plan is missing. See the PAPPGChapter II.C.2.j for further guidance. In very limited circumstances, that is, ONLY when the use of special characters is required, may you upload theProject Summary in this area. See Uploadthe Project Summary with Special Characters for guidance

Work on Data Management Plan

1. Access the **Form Preparation** screen (Figure 1) (see Create a New Proposal, Edit a Proposal, or Create a New Proposal from a Template).

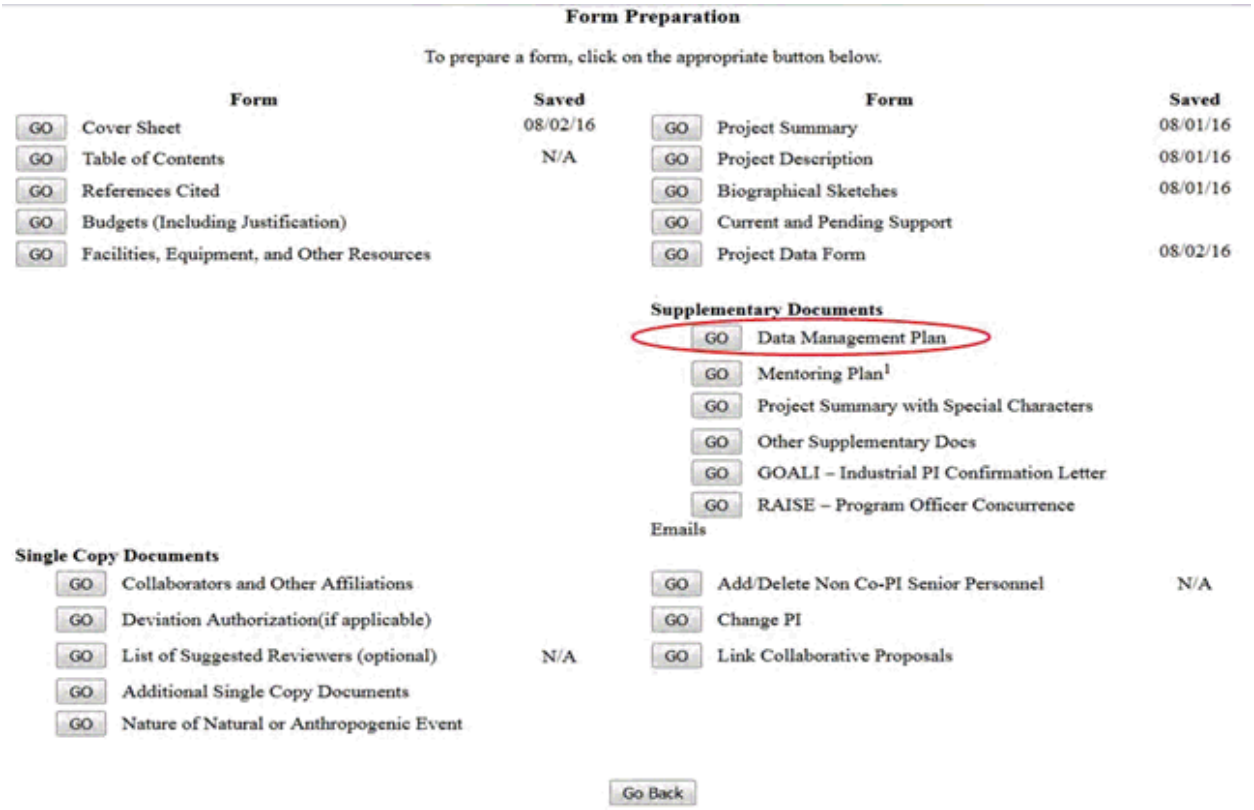


Figure 1 Form Preparation screen. The Go button for Data Management Plan is circled.

2. Click the **Go** button for Data Management Plan on the **Form Preparation** screen (Figure 1). The **Data Management Plan Upload** screen displays (Figure 2).

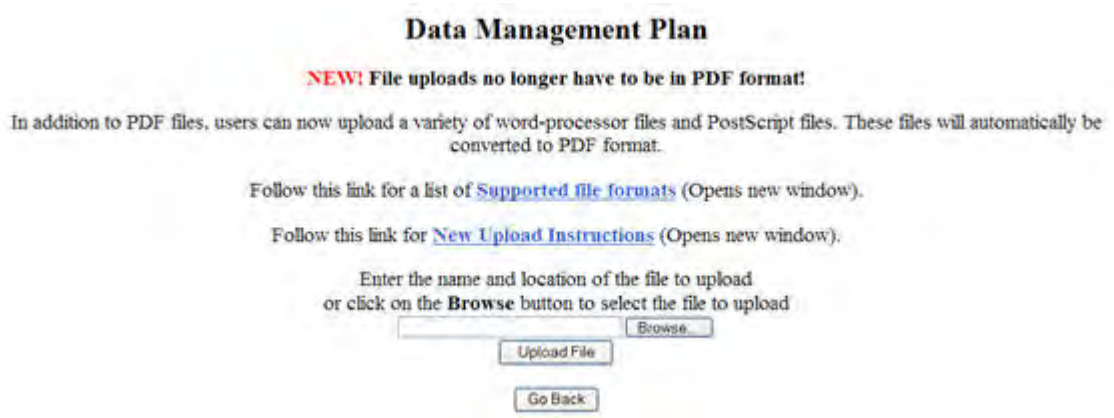


Figure 2 Data Management Plan Upload screen with browse field.

3. See Upload a File instructions to upload a Data Management Plan.

Work on Mentoring Plan

1. Access the **Form Preparation** screen (Figure 3) (see Create a New Proposal or Edit a Proposal).

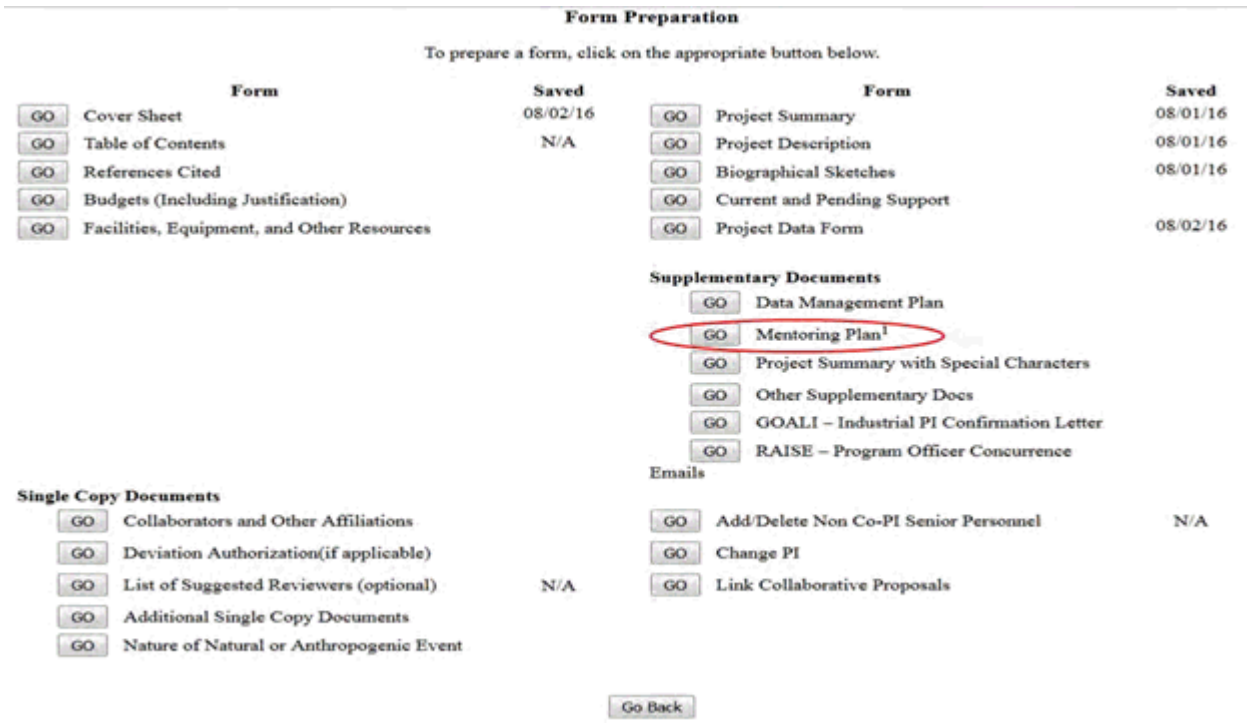


Figure 3 Form Preparation screen. The Go button for Mentoring Plan is circled.

2. Click the **Go** button for Mentoring Plan on the **Form Preparation** screen (Figure 3). The **Mentoring Plan Upload** screen displays (Figure 4).

Figure 4 Mentoring Plan Upload screen with browse field.

3. See Upload a File instructions to upload a Mentoring Plan.

Work on GOALI - Industrial PI Confirmation Letter

1. Access the **Form Preparation** screen (Figure 3) (see Create a New Proposal or Edit a Proposal).

Forms for Temp. Proposal #7742436

Form Preparation

To prepare a form, click on the appropriate button below.

	Form	Saved		Form	Saved
GO	Cover Sheet	01/12/17	GO	Project Summary	01/12/17
GO	Table of Contents	N/A	GO	Project Description	
GO	References Cited		GO	Biographical Sketches	
GO	Budgets (Including Justification)		GO	Current and Pending Support	01/12/17
GO	Facilities, Equipment, and Other Resources				

Supplementary Documents

GO Data Management Plan

GO Mentoring Plan[1]

GO GOALI - Industrial PI Confirmation Letter

GO Project Summary with Special Characters

GO RAISE - Program Officer Concurrence Emails

GO Other Supplementary Docs

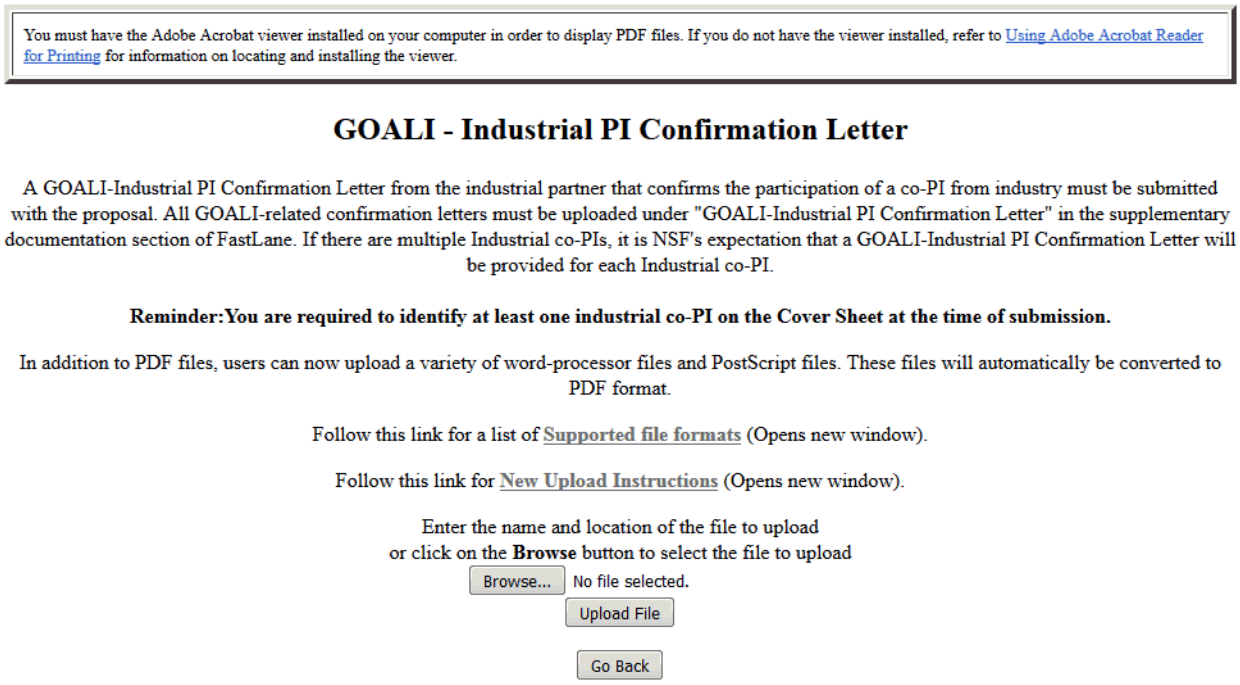
Single Copy Documents

GO	Collaborators and Other Affiliations		GO	Add/Delete Non Co-PI Senior Personnel	N/A
GO	Deviation Authorization(if applicable)		GO	Change PI	
GO	List of Suggested Reviewers (optional)	N/A	GO	Link Collaborative Proposals	
GO	Additional Single Copy Documents				
GO	Nature of Natural or Anthropogenic Event				

Go Back

Figure 3 Form Preparation screen.

2. Click the **Go** button for GOALI - Industrial PI Confirmation Letter on the **Form Preparation** screen (Figure 3). The GOALI - Industrial PI Confirmation Letter Upload screen displays (Figure 4).



You must have the Adobe Acrobat viewer installed on your computer in order to display PDF files. If you do not have the viewer installed, refer to Using Adobe Acrobat Reader for Printing for information on locating and installing the viewer.

GOALI - Industrial PI Confirmation Letter

A GOALI-Industrial PI Confirmation Letter from the industrial partner that confirms the participation of a co-PI from industry must be submitted with the proposal. All GOALI-related confirmation letters must be uploaded under "GOALI-Industrial PI Confirmation Letter" in the supplementary documentation section of FastLane. If there are multiple Industrial co-PIs, it is NSF's expectation that a GOALI-Industrial PI Confirmation Letter will be provided for each Industrial co-PI.

Reminder:You are required to identify at least one industrial co-PI on the Cover Sheet at the time of submission.

In addition to PDF files, users can now upload a variety of word-processor files and PostScript files. These files will automatically be converted to PDF format.

Follow this link for a list of Supported file formats (Opens new window).

Follow this link for New Upload Instructions (Opens new window).

Enter the name and location of the file to upload
or click on the **Browse** button to select the file to upload

Browse... No file selected.

Upload File

Go Back

Figure 4 GOALI - Industrial PI Confirmation Letter Upload screen with browse field.

3. See Upload a File instructions to upload a GOALI - Industrial PI Confirmation Letter

Work on RAISE - Program Officer Concurrence Emails

1. Access the **Form Preparation** screen (Figure 3) (see Create a New Proposal or Edit a Proposal).

Forms for Temp. Proposal #7742436

Form Preparation

To prepare a form, click on the appropriate button below.

	Form	Saved		Form	Saved
GO	Cover Sheet	01/12/17	GO	Project Summary	01/12/17
GO	Table of Contents	N/A	GO	Project Description	
GO	References Cited		GO	Biographical Sketches	
GO	Budgets (Including Justification)		GO	Current and Pending Support	01/12/17
GO	Facilities, Equipment, and Other Resources				

Supplementary Documents

GO	Data Management Plan	
GO	Mentoring Plan[1]	
GO	GOALI - Industrial PI Confirmation Letter	
GO	Project Summary with Special Characters	
GO	RAISE - Program Officer Concurrence Emails	
GO	Other Supplementary Docs	

Single Copy Documents

GO	Collaborators and Other Affiliations		GO	Add/Delete Non Co-PI Senior Personnel	N/A
GO	Deviation Authorization(if applicable)		GO	Change PI	
GO	List of Suggested Reviewers (optional)	N/A	GO	Link Collaborative Proposals	
GO	Additional Single Copy Documents				
GO	Nature of Natural or Anthropogenic Event				

Go Back

Figure 3 Form Preparation screen.

2. Click the **Go** button for RAISE - Program Officer Concurrence Emails on the **Form Preparation** screen (Figure 3). The RAISE - Program Officer Concurrence Emails Upload screen displays (Figure 4).

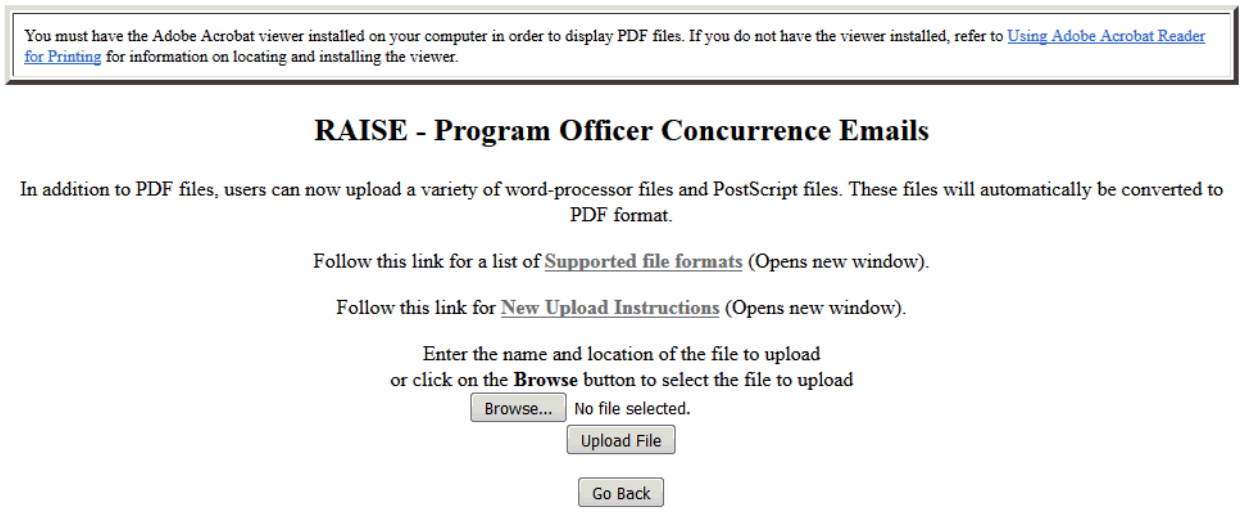


Figure 4 RAISE - Program Officer Concurrence Emails Upload screen with browse field.

3. See Upload a File instructions to upload a RAISE - Program Officer Concurrence Emails

Work on Other Supplementary Documents

The types of Other Supplementary Documents are described in the PAPPG Chapter II.C.2.j.

1. Access the **Form Preparation** screen (Figure 5) (see Create a New Proposal, Edit a Proposal, or Create a New Proposal from a Template).

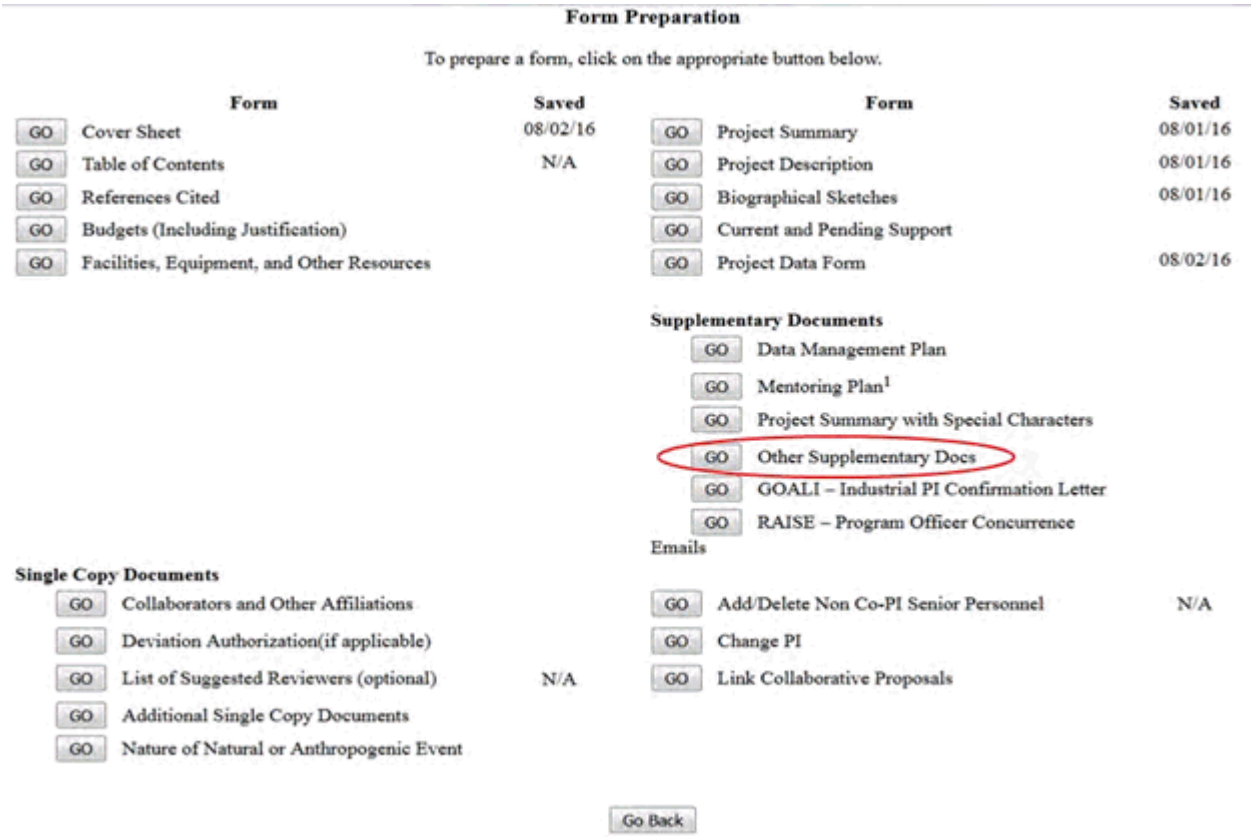


Figure 5 Form Preparation screen. The Go button for Other Supplementary Docs is circled.

2. Click the **Go** button for Other Supplementary Docs on the **Form Preparation** screen (Figure 5). The **Other Supplementary Docs** screen displays (Figure 6).

Figure 6 Other Supplementary Docs screen with text box.

You have these options:

- Enter the Other Supplementary Document in the text box
- Upload the Other Supplementary Document

See also:

- Cover Sheet
- Table of Contents
- References Cited
- Budgets (Including Justification)
- Facilities, Equipment, and Other Resources
- Deviation Authorization
- List of Suggested Reviewers
- Additional Single Copy Documents
- Project Summary
- Project Description
- Biographical Sketches
- Current and Pending Support
- Add/Delete Non-Co-PI Senior Personnel
- Change PI
- Link Collaborative Proposals
- Proposal Classification Form

What Are Supplementary Documents?

This area allows for entering Mentoring Plans and Other Supplementary Documents that either your Sponsored Projects Office or the *Proposal & Award Policies & Procedures Guide (PAPPG)* specifies for the proposal. Each proposal that requests funding to support postdoctoral researchers must include, as a supplementary document, a description of the mentoring activities that will be provided for such individuals. If a Postdoctoral Researcher Mentoring Plan is required, FastLane will not permit submission of a proposal if the Plan is missing. See the PAPPGChapter II.C.2.j for further guidance. In very limited circumstances, that is, ONLY when the use of special characters is required, may you upload theProject Summary in this area. See Uploadthe Project Summary with Special Characters for guidance

Work on Data Management Plan

1. Access the **Form Preparation** screen (Figure 1) (see Create a New Proposal, Edit a Proposal, or Create a New Proposal from a Template).

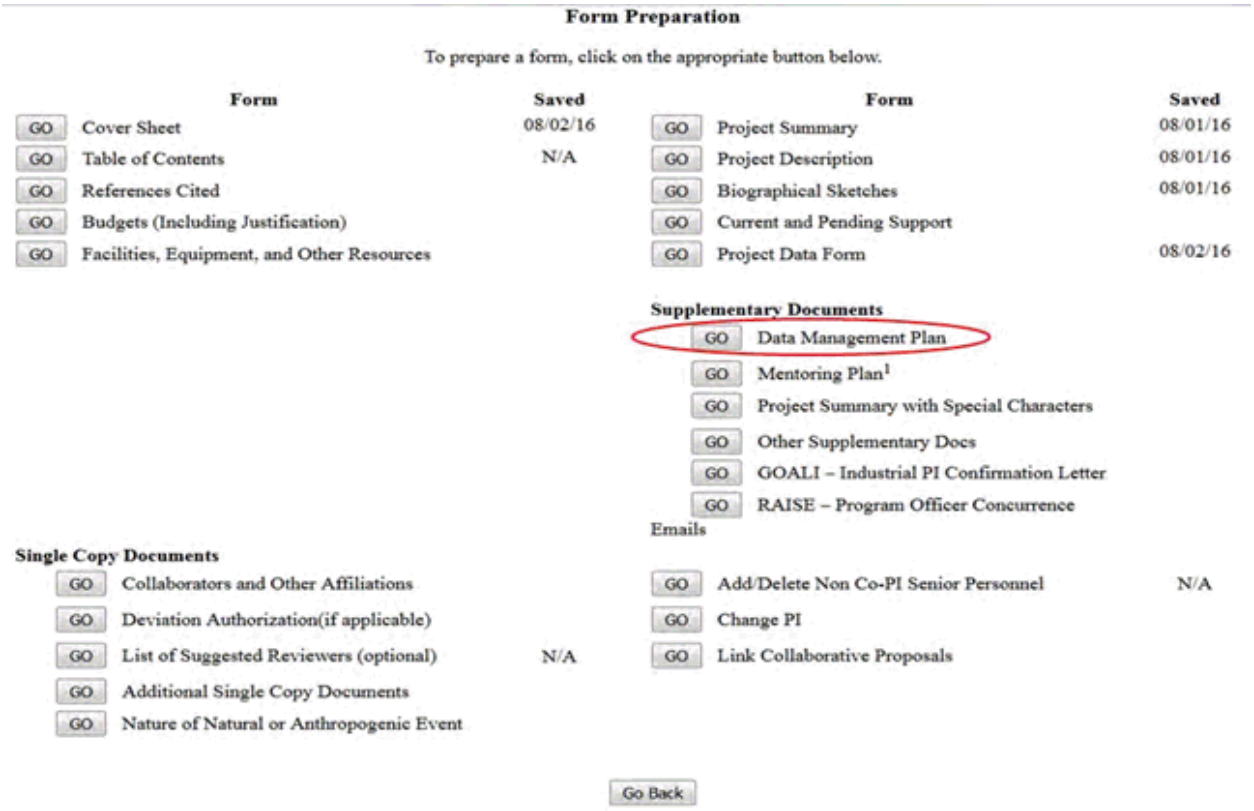


Figure 1 Form Preparation screen. The Go button for Data Management Plan is circled.

2. Click the **Go** button for Data Management Plan on the **Form Preparation** screen (Figure 1). The **Data Management Plan Upload** screen displays (Figure 2).

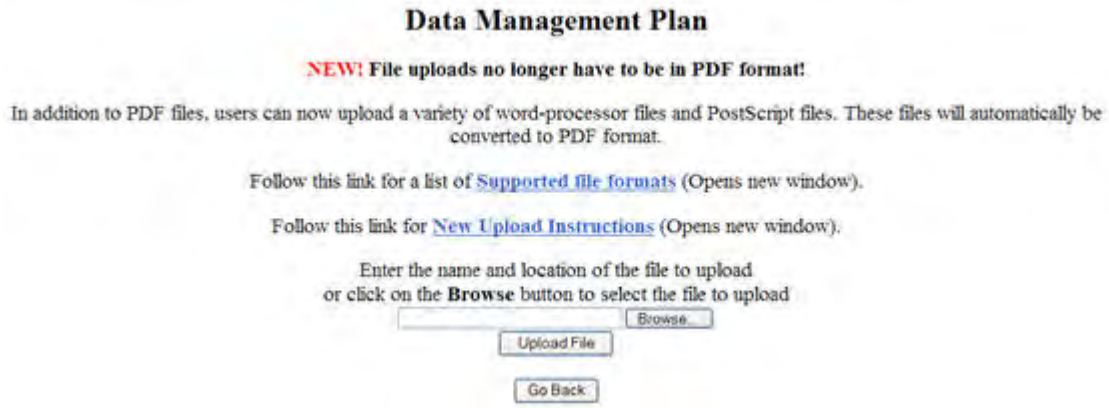


Figure 2 Data Management Plan Upload screen with browse field.

3. See Upload a File instructions to upload a Data Management Plan.

Work on Mentoring Plan

1. Access the **Form Preparation** screen (Figure 3) (see Create a New Proposal or Edit a Proposal).

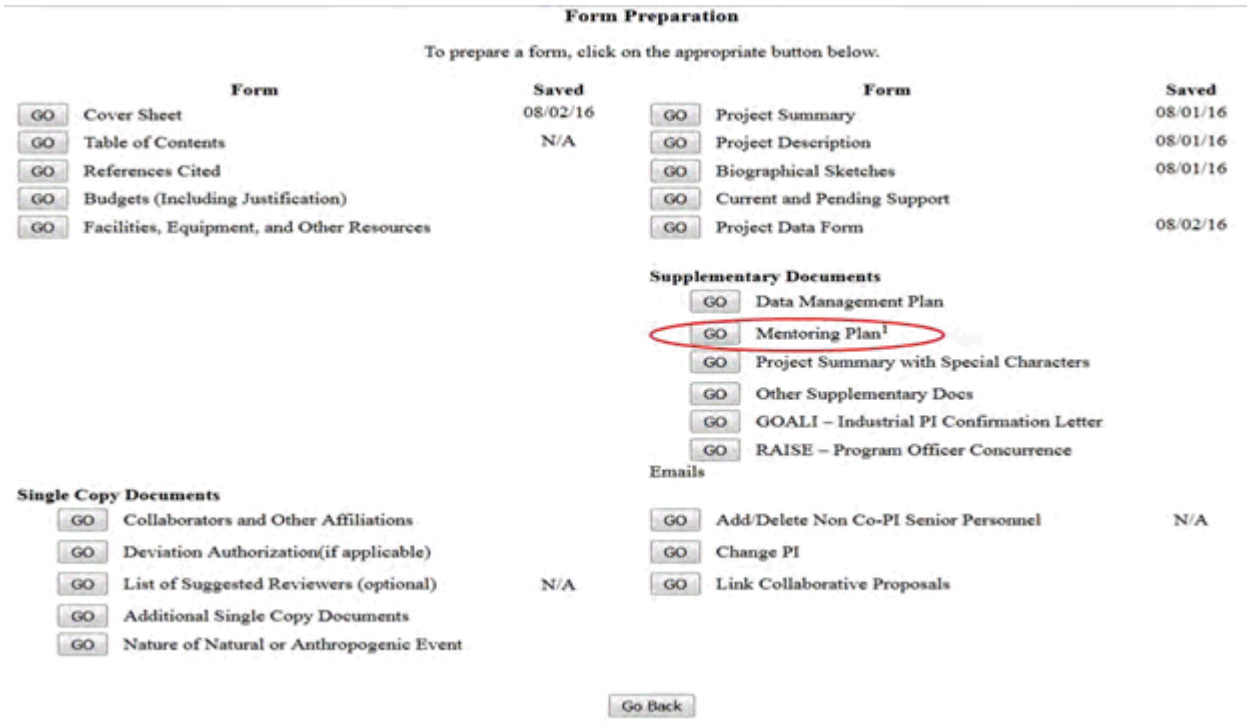


Figure 3 Form Preparation screen. The Go button for Mentoring Plan is circled.

2. Click the **Go** button for Mentoring Plan on the **Form Preparation** screen (Figure 3). The **Mentoring Plan Upload** screen displays (Figure 4).

Figure 4 Mentoring Plan Upload screen with browse field.

3. See Upload a File instructions to upload a Mentoring Plan.

Work on GOALI - Industrial PI Confirmation Letter

1. Access the **Form Preparation** screen (Figure 3) (see Create a New Proposal or Edit a Proposal).

Forms for Temp. Proposal #7742436

Form Preparation

To prepare a form, click on the appropriate button below.

	Form	Saved		Form	Saved
GO	Cover Sheet	01/12/17	GO	Project Summary	01/12/17
GO	Table of Contents	N/A	GO	Project Description	
GO	References Cited		GO	Biographical Sketches	
GO	Budgets (Including Justification)		GO	Current and Pending Support	01/12/17
GO	Facilities, Equipment, and Other Resources				

Supplementary Documents

GO Data Management Plan

GO Mentoring Plan[1]

GO GOALI - Industrial PI Confirmation Letter

GO Project Summary with Special Characters

GO RAISE - Program Officer Concurrence Emails

GO Other Supplementary Docs

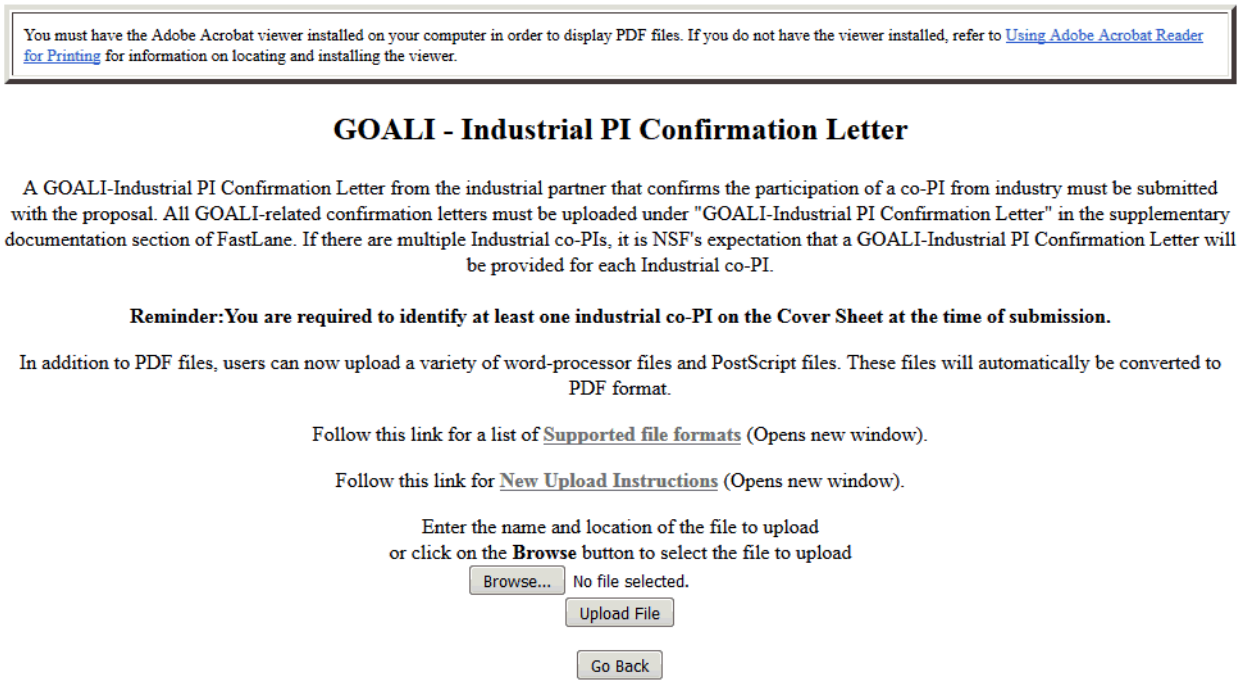
Single Copy Documents

GO	Collaborators and Other Affiliations		GO	Add/Delete Non Co-PI Senior Personnel	N/A
GO	Deviation Authorization(if applicable)		GO	Change PI	
GO	List of Suggested Reviewers (optional)	N/A	GO	Link Collaborative Proposals	
GO	Additional Single Copy Documents				
GO	Nature of Natural or Anthropogenic Event				

Go Back

Figure 3 Form Preparation screen.

2. Click the **Go** button for GOALI - Industrial PI Confirmation Letter on the **Form Preparation** screen (Figure 3). The GOALI - Industrial PI Confirmation Letter Upload screen displays (Figure 4).



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GOALI - Industrial PI Confirmation Letter

A GOALI-Industrial PI Confirmation Letter from the industrial partner that confirms the participation of a co-PI from industry must be submitted with the proposal. All GOALI-related confirmation letters must be uploaded under "GOALI-Industrial PI Confirmation Letter" in the supplementary documentation section of FastLane. If there are multiple Industrial co-PIs, it is NSF's expectation that a GOALI-Industrial PI Confirmation Letter will be provided for each Industrial co-PI.

Reminder:You are required to identify at least one industrial co-PI on the Cover Sheet at the time of submission.

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Follow this link for a list of Supported file formats (Opens new window).

Follow this link for New Upload Instructions (Opens new window).

Enter the name and location of the file to upload
or click on the **Browse** button to select the file to upload

Browse... No file selected.

Upload File

Go Back

Figure 4 GOALI - Industrial PI Confirmation Letter Upload screen with browse field.

3. See Upload a File instructions to upload a GOALI - Industrial PI Confirmation Letter

Work on RAISE - Program Officer Concurrence Emails

1. Access the **Form Preparation** screen (Figure 3) (see Create a New Proposal or Edit a Proposal).

Forms for Temp. Proposal #7742436

Form Preparation

To prepare a form, click on the appropriate button below.

	Form	Saved		Form	Saved
GO	Cover Sheet	01/12/17	GO	Project Summary	01/12/17
GO	Table of Contents	N/A	GO	Project Description	
GO	References Cited		GO	Biographical Sketches	
GO	Budgets (Including Justification)		GO	Current and Pending Support	01/12/17
GO	Facilities, Equipment, and Other Resources				

Supplementary Documents

GO Data Management Plan

GO Mentoring Plan[1]

GO GOALI - Industrial PI Confirmation Letter

GO Project Summary with Special Characters

GO RAISE - Program Officer Concurrence Emails

GO Other Supplementary Docs

Single Copy Documents

GO	Collaborators and Other Affiliations		GO	Add/Delete Non Co-PI Senior Personnel	N/A
GO	Deviation Authorization(if applicable)		GO	Change PI	
GO	List of Suggested Reviewers (optional)	N/A	GO	Link Collaborative Proposals	
GO	Additional Single Copy Documents				
GO	Nature of Natural or Anthropogenic Event				

Go Back

Figure 3 Form Preparation screen.

2. Click the **Go** button for RAISE - Program Officer Concurrence Emails on the **Form Preparation** screen (Figure 3). The RAISE - Program Officer Concurrence Emails Upload screen displays (Figure 4).

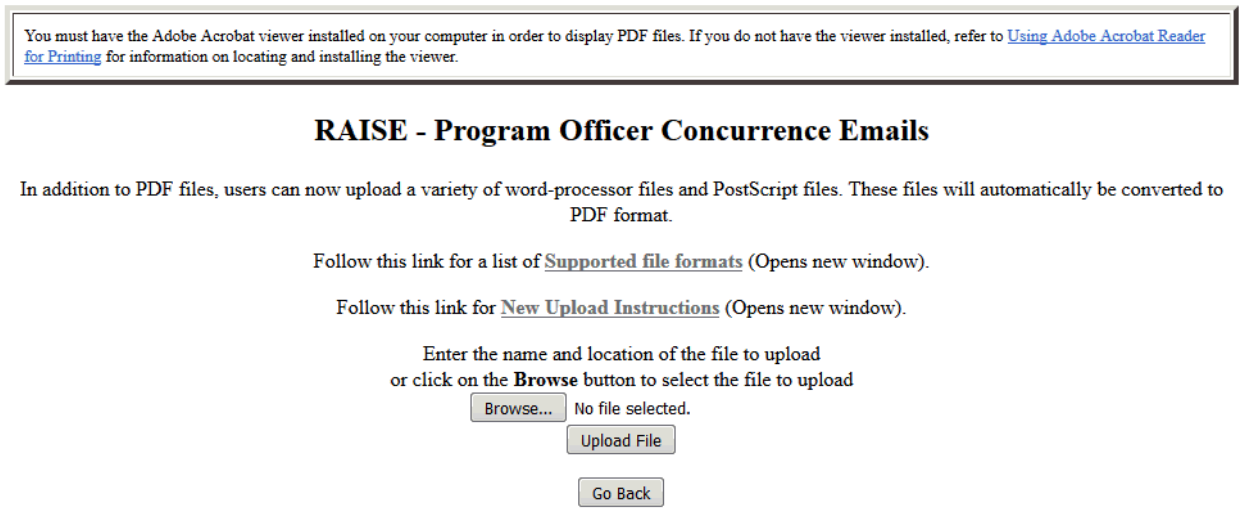

Figure 4 RAISE - Program Officer Concurrence Emails Upload screen with browse field.

3. See Upload a File instructions to upload a RAISE - Program Officer Concurrence Emails

Work on Other Supplementary Documents

The types of Other Supplementary Documents are described in the PAPPG Chapter II.C.2.j.

1. Access the **Form Preparation** screen (Figure 5) (see Create a New Proposal, Edit a Proposal, or Create a New Proposal from a Template).

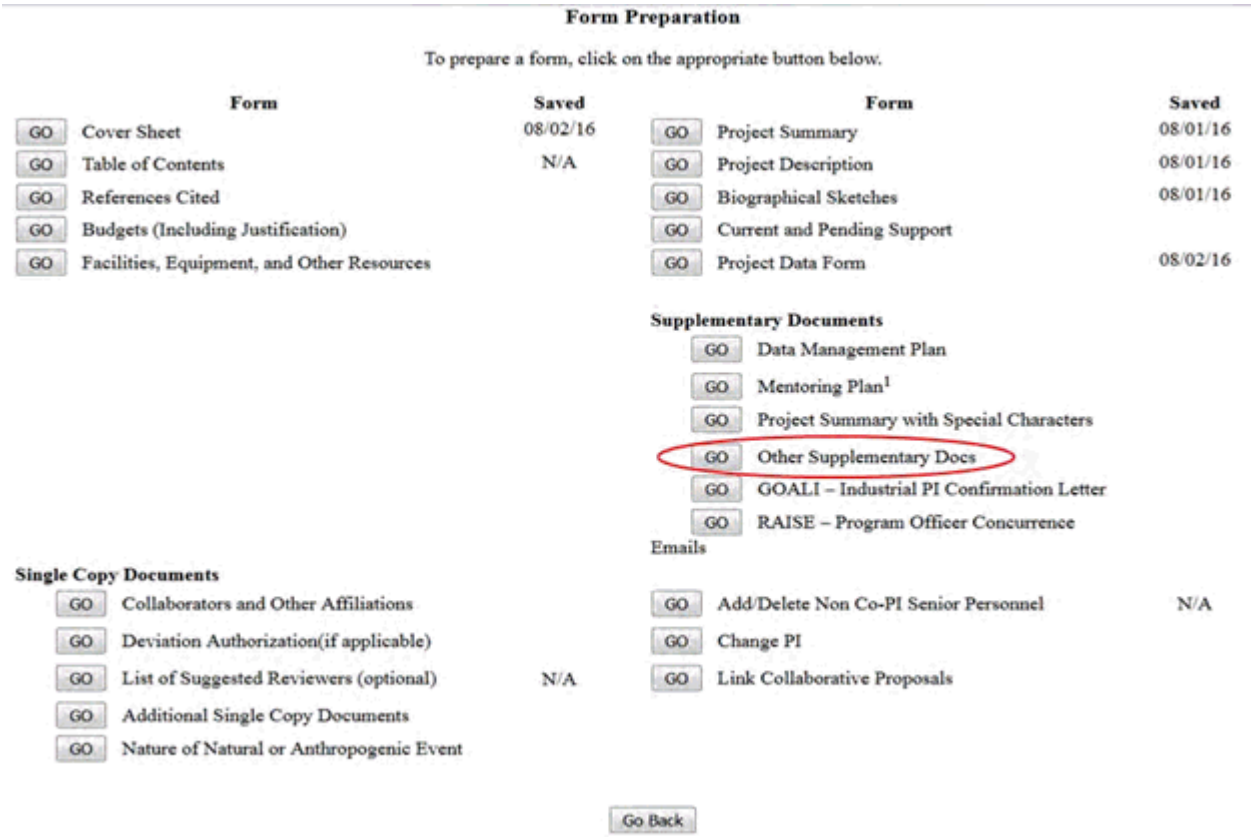

Figure 5 Form Preparation screen. The Go button for Other Supplementary Docs is circled.

2. Click the **Go** button for Other Supplementary Docs on the **Form Preparation** screen (Figure 5). The **Other Supplementary Docs** screen displays (Figure 6).

Figure 6 Other Supplementary Docs screen with text box.

You have these options:

- Enter the Other Supplementary Document in the text box
- Upload the Other Supplementary Document

See also:

- Cover Sheet
- Table of Contents
- References Cited
- Budgets (Including Justification)
- Facilities, Equipment, and Other Resources
- Deviation Authorization
- List of Suggested Reviewers
- Additional Single Copy Documents
- Project Summary
- Project Description
- Biographical Sketches
- Current and Pending Support
- Add/Delete Non-Co-PI Senior Personnel
- Change PI
- Link Collaborative Proposals
- Proposal Classification Form

Enter Your Other Supplementary Document in the Text Box

1. Access the **Other Supplementary Docs** screen (Figure 1) (see Work on Supplementary Documents).

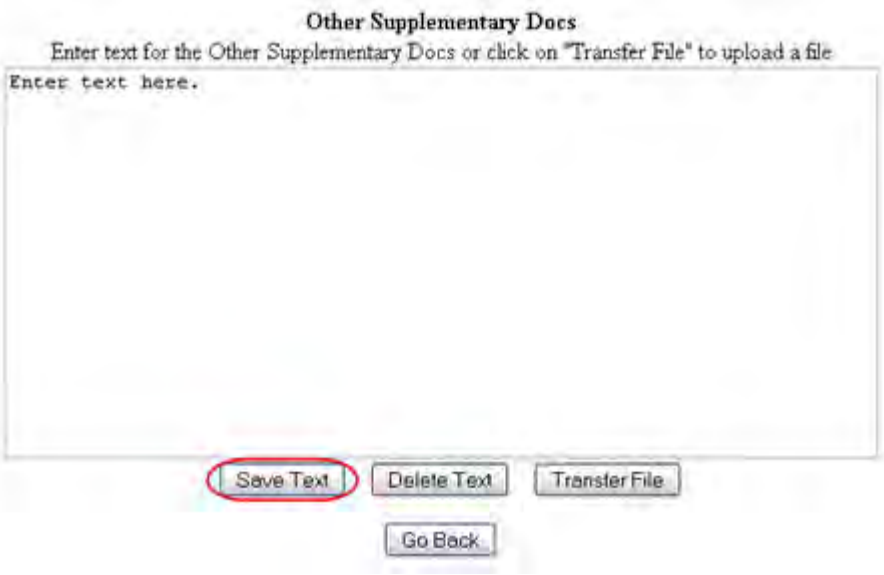

Figure 1 Other Supplementary Docs screen. The Save Text button is circled.

2. Type in or copy and paste the Supplementary Document in the text box (Figure 1).

3. Click the **Save Text** button (Figure 1). A screen displays (Figure 2) with the message that the Supplementary Document data is saved.

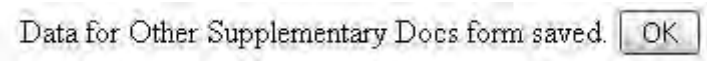

Figure 2 Screen with the message that the Other Supplementary Document text has been saved.

4. Click the **OK** button (Figure 2). The **Form Preparation** screen displays.

Upload Your Other Supplementary Document

1. Access the **Other Supplementary Docs** screen (Figure 1) (see Work on Supplementary Documents).

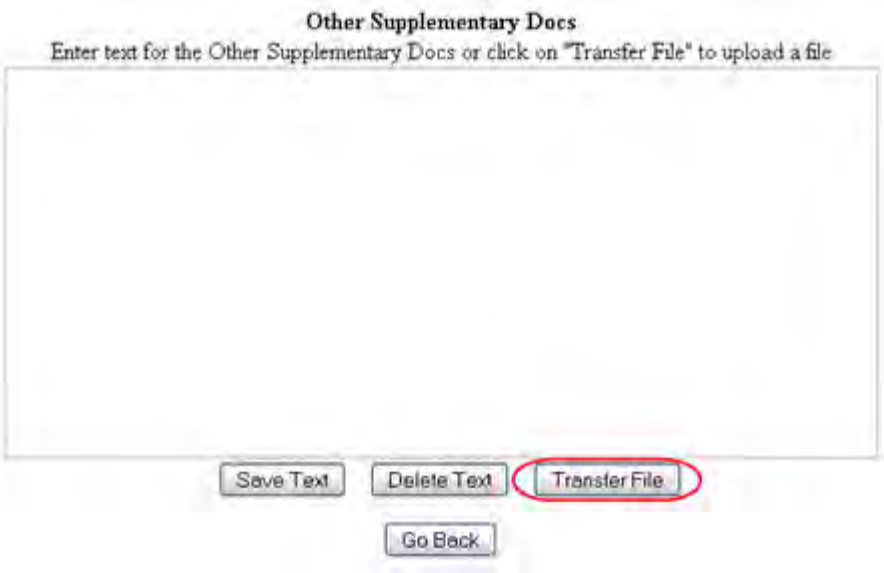

Figure 1 Other Supplementary Docs screen. The Transfer File button is circled.

2. Click the **Transfer File** button (Figure 1). The **Supplementary Document File Upload** screen displays (Figure 2). See Upload a File for directions.

Figure 2 Supplementary Documents File Upload screen.

If a Supplementary Document has already been uploaded, when you click the **Go** button for Other Supplementary Document on the **Form Preparation** screen, the **Supplementary Document File Upload** screen displays as in Figure 3.

Figure 3 Supplementary Document File Upload screen after a file has been uploaded.

This screen gives you these options:

- Display Current Supplementary Docs
- Delete Current Supplementary Docs
- Upload a Supplementary Document

Note: Uploading a new Supplementary Document will not result in deleting a previously uploaded file.

Display Current Supplementary Docs

1. On the **Supplementary Document File Upload** screen (Figure 3), highlight the Supplementary Document you want to view in the list.
2. Click the **Display Current Supplementary Docs** button (Figure 3). The file displays in PDF format. If you need to download Adobe Reader, see Adobe Reader for FastLane.

Delete Current Supplementary Docs

1. On the **Supplementary Document File Upload** screen (Figure 3), highlight the Supplementary Document you want to delete in the list.
2. Click the **Delete Current Supplementary Docs** button (Figure 3). A screen displays asking you to confirm that you want to delete the file.
3. Click the **OK** button. The **Form Preparation** screen displays.

Upload a Supplementary Document

Follow the directions in Upload a File. Uploading a new file will not replace any previously uploaded files.

Enter a New Other Supplementary Document in the Text Box

If a Supplementary Document has already been uploaded and you want to write a new Supplementary Document in the text box, do the following:

1. On the **Supplementary Document File Upload** screen (Figure 3), click the **Delete Current Project Summary** button. A screen displays with a message for you to confirm that you want to delete the file.
2. Click the **OK** button. The **Supplementary Docs File Upload** screen displays (Figure 3).
3. Return to the **Form Preparation** screen.
4. Click the **Go** button next to Other Supplementary Docs. The **Other Supplementary Docs** screen displays with the text box. See Enter the Supplementary Document in the Text Box.

Add/Delete Non-Co-PI Senior Personnel

What Is Add/Delete Non-Co-PI Senior Personnel?

You can add Senior Personnel to the proposal or delete Senior Personnel from the proposal.

You *must* add the name of a Senior Person in this section for their name to display in the list of Senior Personnel for whom you can request NSF funds in the Budgets (Including Justification) form.

Conversely, deleting an individual as a Senior Person removes their name from the list of persons for whom you can request funding in the Budgets (Including Justification) and

removes their Biographical Sketch from the proposal if a sketch has been entered or uploaded.
In this form, you can take these actions:
- Add a Senior Person
- Delete a Senior Person

See also:
- Cover Sheet
- Table of Contents
- References Cited
- Budgets (Including Justification)
- Facilities, Equipment, and Other Resources
- Deviation Authorization
- List of Suggested Reviewers
- Additional Single Copy Documents
- Project Summary
- Project Description
- Biographical Sketches
- Current and Pending Support
- Supplementary Docs
- Change PI
- Link Collaborative Proposals
- Proposal Classification Form

What Is Add/Delete Non-Co-PI Senior Personnel?

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You *must* add the name of a Senior Person in this section for their name to display in the list of Senior Personnel for whom you can request NSF funds in the Budgets (Including Justification) form.

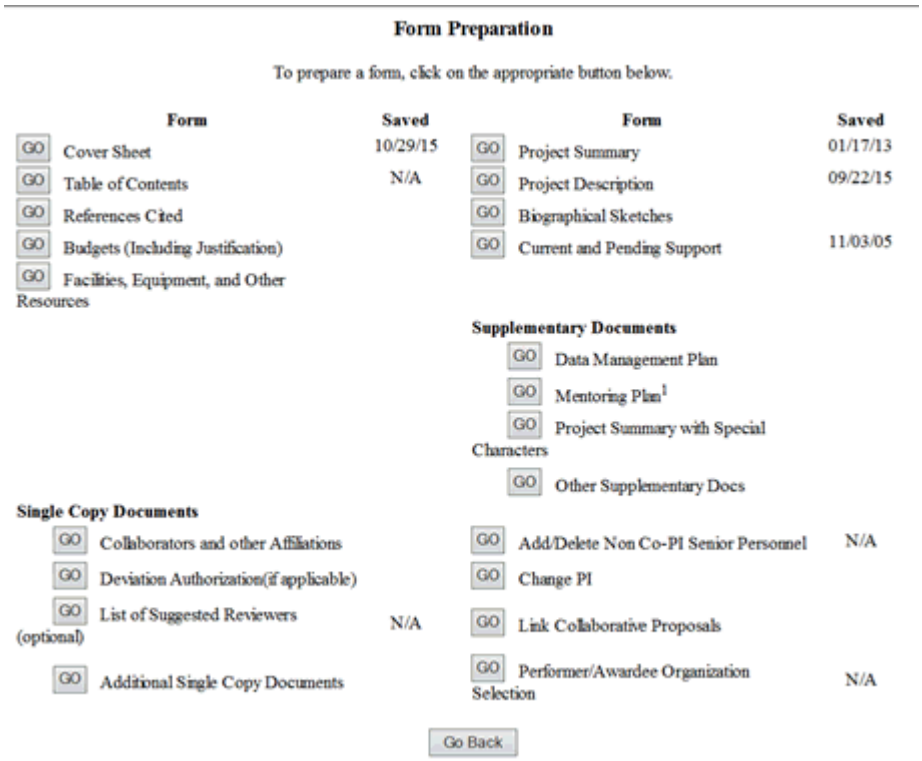
Conversely, deleting an individual as a Senior Person removes their name from the list of persons for whom you can request funding in the Budgets (Including Justification) and removes their Biographical Sketch from the proposal if a sketch has been entered or uploaded.
In this form, you can take these actions:
- Add a Senior Person
- Delete a Senior Person

See also:
- Cover Sheet
- Table of Contents
- References Cited
- Budgets (Including Justification)
- Facilities, Equipment, and Other Resources
- Deviation Authorization
- List of Suggested Reviewers
- Additional Single Copy Documents
- Project Summary

- Project Description
- Biographical Sketches
- Current and Pending Support
- Supplementary Docs
- Change PI
- Link Collaborative Proposals
- Proposal Classification Form

Add a Senior Person

1. Access the **Form Preparation** screen (Figure 1) (see Create a New Proposal or Edit a Proposal).



Form Preparation

To prepare a form, click on the appropriate button below.

Form	Saved	Form	Saved
GO Cover Sheet	10/29/15	GO Project Summary	01/17/13
GO Table of Contents	N/A	GO Project Description	09/22/15
GO References Cited		GO Biographical Sketches	
GO Budgets (Including Justification)		GO Current and Pending Support	11/03/05
GO Facilities, Equipment, and Other Resources			

Supplementary Documents

GO Data Management Plan
GO Mentoring Plan[1]
GO Project Summary with Special Characters
GO Other Supplementary Docs

Single Copy Documents

GO Collaborators and other Affiliations
GO Deviation Authorization(if applicable)
GO List of Suggested Reviewers (optional) N/A
GO Additional Single Copy Documents

GO Add/Delete Non Co-PI Senior Personnel N/A
GO Change PI
GO Link Collaborative Proposals
GO Performer/Awardee Organization Selection N/A

Go Back

Figure 1 Form Preparation screen. The Go button for Add/Delete Non Co-PI Senior Personnel is circled.

2. Click the **Go** button for Add/Delete Non-Co-PI Senior Personnel (Figure 1). The **Add/Delete Non-Co-PI Senior Personnel Assigned to Proposal** screen displays (Figure 2).

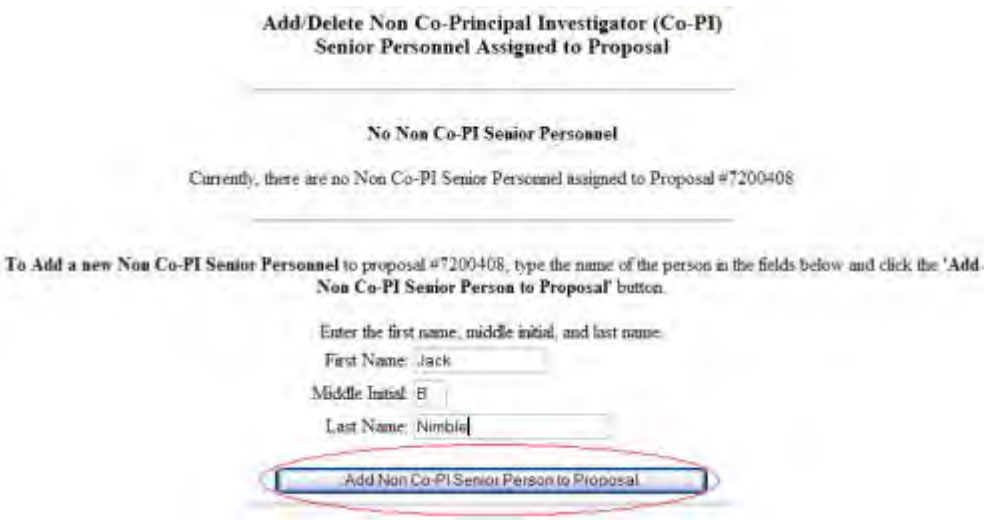


Figure 2 Add/Delete Non Co-PI Senior Personnel Assigned to Proposal screen. The Add Non-Co-PI Senior Person to Proposal button is circled.

3. In the **First Name** box (Figure 2), type the person's first name.
4. In the **Middle Initial** box (Figure 2), type the person's middle initial.
5. In the **Last Name** box (Figure 3), type the person's last name.
6. Click the **Add Non Co-PI Senior Person to Proposal** button (Figure 2). The **Add/Delete Non-Co-PI Senior Personnel** screen displays (Figure 3). The name of the added Senior Person now displays in a list at the top of the screen. The person's name also displays in the Budgets (Including Justification) in the list of people for whom you can request funds from NSF in the proposal budget.

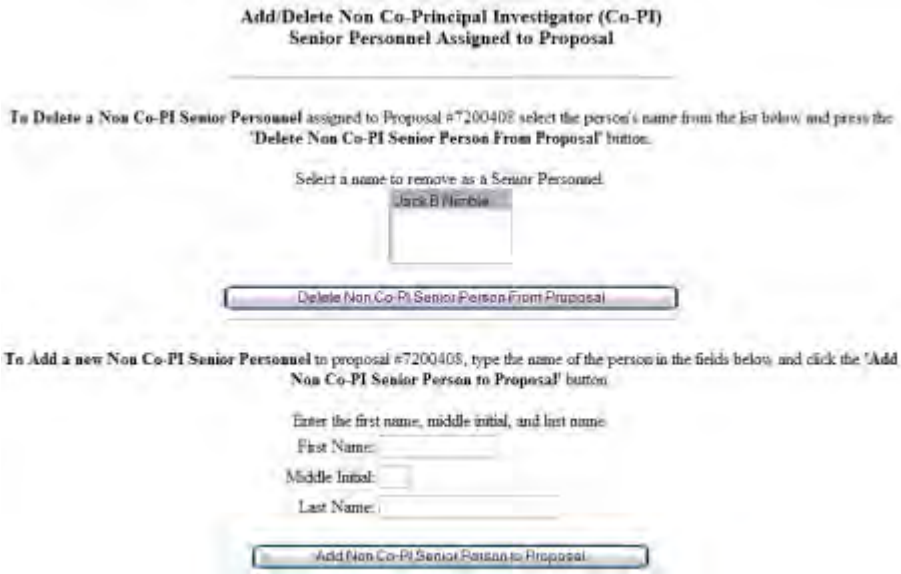
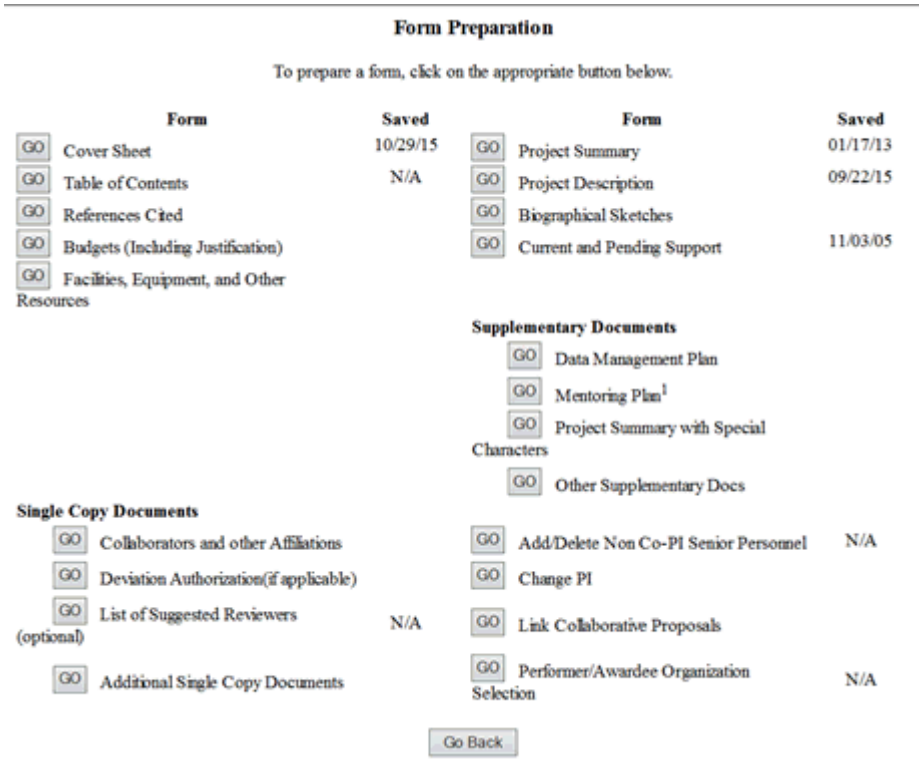


Figure 3 Add/Delete Non-Co-PI Senior Personnel Assigned to Proposal screen with the name of the newly added Senior Person in the list of Senior Personnel at the top.

Delete a Senior Person

1. Access the **Form Preparation** screen (Figure 1) (see Create a New Proposal or Edit a Proposal).



Form Preparation

To prepare a form, click on the appropriate button below.

Form	Saved	Form	Saved
GO Cover Sheet	10/29/15	GO Project Summary	01/17/13
GO Table of Contents	N/A	GO Project Description	09/22/15
GO References Cited		GO Biographical Sketches	
GO Budgets (Including Justification)		GO Current and Pending Support	11/03/05
GO Facilities, Equipment, and Other Resources			

Supplementary Documents

- GO Data Management Plan
- GO Mentoring Plan[1]
- GO Project Summary with Special Characters
- GO Other Supplementary Docs

Single Copy Documents

GO Collaborators and other Affiliations		GO Add/Delete Non Co-PI Senior Personnel	N/A
GO Deviation Authorization(if applicable)		GO Change PI	
GO List of Suggested Reviewers (optional)	N/A	GO Link Collaborative Proposals	
GO Additional Single Copy Documents		GO Performer/Awardee Organization Selection	N/A

Go Back

Figure 1 Form Preparation screen. The Go button for Add/Delete Non Co-PI Senior Personnel is circled.

2. Click the **Go** button for Add/Delete Non-Co-PI Senior Personnel (Figure 1). The **Add/Delete Non-Co-PI Senior Personnel Assigned to Proposal** screen displays (Figure 2).

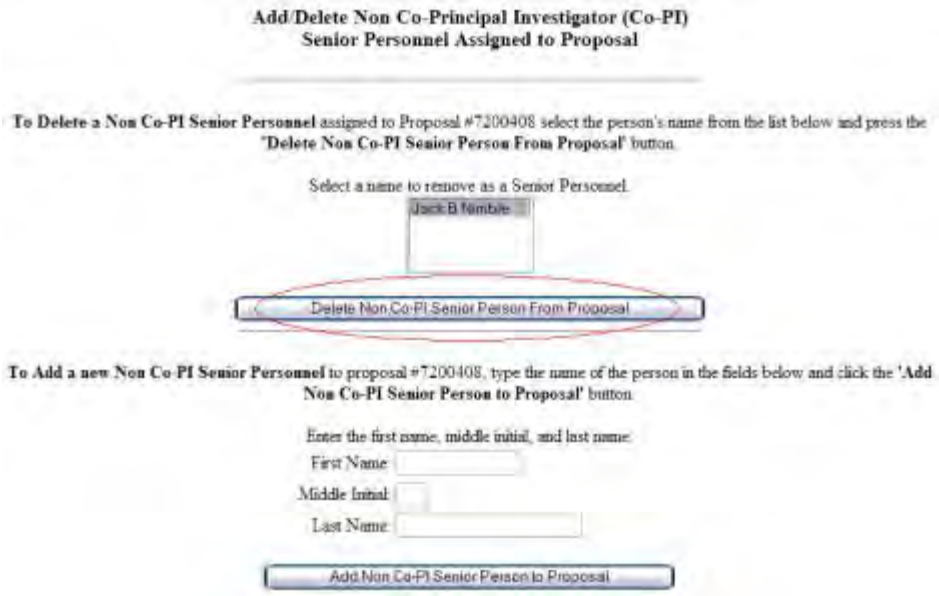


Figure 2 Add/Delete Non-Co-Principal Investigator Senior Personnel Assigned to Proposal screen. The Delete Non-Co-PI Senior Person from Proposal button is circled.

2. Highlight the name of the Senior Person you want to delete from the list of Senior Persons (Figure 2).
3. Click the **Delete Non-Senior Person From Proposal** button (Figure 2). A screen displays (Figure 3) with a message for you to confirm that you want to delete this Senior Person from the proposal.

Figure 3 Screen with a message for you to confirm that you want to delete this Senior Person from the proposal.

4. Click the **OK** button (Figure 3). A screen displays (Figure 4) with a message that the name you selected has been deleted.

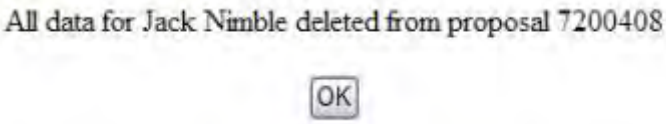


Figure 4 Screen with a message that the Senior Person has been deleted.

5. Click the **OK** button (Figure 4). The **Add/Delete Non-Co-Principal Investigator Senior Personnel Assigned to Proposal** screen displays with the person's name no longer on the list of Senior Persons.

What Is Change PI?

In this section, you can designate a Co-PI as a PI for the proposal. The former PI then becomes a Co-PI.

The person being made a PI for the proposal *must* meet these conditions:

- Be registered with NSF
  If not, request your SPO to register the person.
- Be listed as a Co-PI for the proposal
  If the person is not currently listed as a Co-PI on the proposal, they should be added as a Co-PI in the Co-PI Information section of the Remainder of the Cover Sheet component of the Cover Sheet.

Work on Change PI

1. **Access the Form Preparation** screen (Figure 1) (see Create a New Proposalor Edit a Proposal).

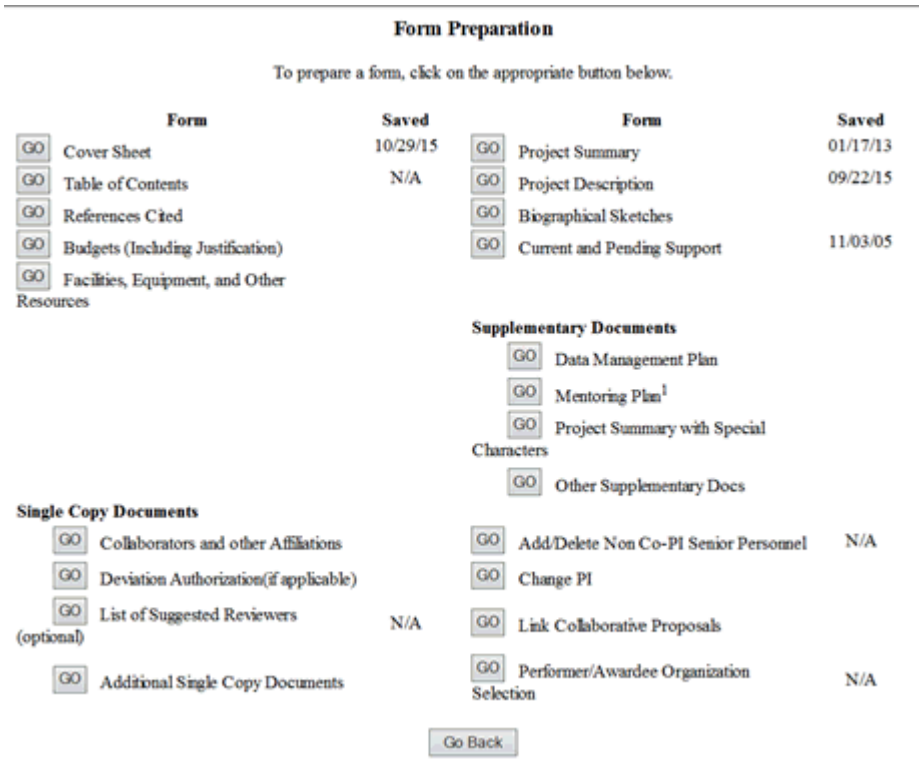


Figure 1 Form Preparation screen. The Go button next to Change PI is circled.

2. Click the **Go** button for Change PI (Figure 1). The **Change PI on Proposal** screen displays (Figure 2) and lists all the Co-PIs on the proposal.

Figure 2 Change PI on Proposal screen. The Change PI button is circled.

3. Highlight the name of the person you want to designate PI from the list of Co-PIs (Figure 2).
4. Click the **Change PI** button (Figure 2). A screen displays (Figure 3) with a warning that you are about to change the PI of the proposal.

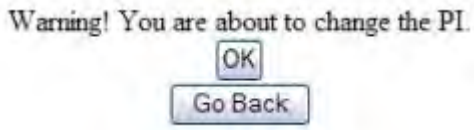


Figure 3 Screen with a warning that you are about to change the PI.

5. Click the **OK** button (Figure 3). A screen displays (Figure 4) with the message that the PI on the proposal is now changed.

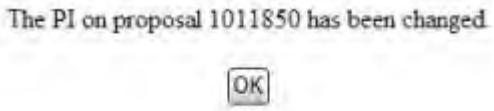


Figure 4 Screen with the message that the PI has been changed.

6. Click the **OK** button (Figure 4). The **Change PI on Proposal** screen displays (Figure 5). This time, the former PI is on the list of Co-PIs, and the new PI's name is no longer on the list.

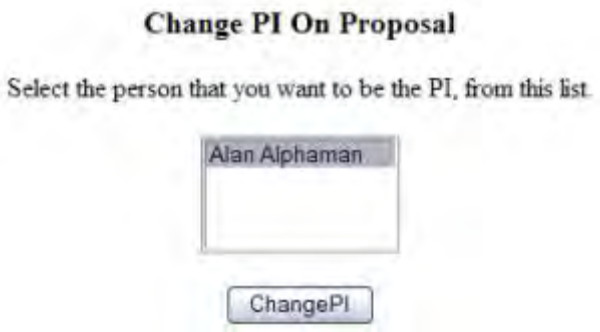


Figure 5 Change PI on Proposal screen with the original PI now listed as the Co-PI.

See also:

- Cover Sheet
- Table of Contents
- References Cited
- Budgets (Including Justification)
- Facilities, Equipment, and Other Resources
- Deviation Authorization
- List of Suggested Reviewers
- Additional Single Copy Documents
- Project Summary
- Project Description
- Biographical Sketches
- Current and Pending Support
- Supplementary Docs
- Add/Delete Non-Co-PI Senior Personnel
- Link Collaborative Proposals
- Proposal Classification Form

Link Collaborative Proposals

What Is Link Collaborative Proposals?

In this section you can link your temporary proposal with other temporary proposals. This gives NSF the ability to evaluate and consider the lead and non-lead proposals together.

Linking your proposal to another temporary proposal results in the deletion in the non-lead linked proposal of:

- Project Summary
- Project Description
- References Cited

You may link your proposal to as many other temporary proposals as you require.

You have these options in Link Collaborative Proposals:

- Link a temporary proposal
- Delete a link between proposals

See also:
- Cover Sheet
- Table of Contents
- References Cited
- Budgets (Including Justification)
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- Change PI
- Proposal Classification Form

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- Project Summary
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- References Cited

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You have these options in Link Collaborative Proposals:
- Link a temporary proposal
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See also:
- Cover Sheet
- Table of Contents
- References Cited
- Budgets (Including Justification)
- Facilities, Equipment, and Other Resources
- Deviation Authorization
- List of Suggested Reviewers
- Additional Single Copy Documents
- Project Summary
- Project Description
- Biographical Sketches
- Current and Pending Support
- Supplementary Docs
- Add/Delete Non-Co-PI Senior Personnel
- Change PI
- Proposal Classification Form

Link a Temporary Proposal

1. Access the **Form Preparation** screen (Figure 1) (see Create a New Proposal or Edit a Proposal).

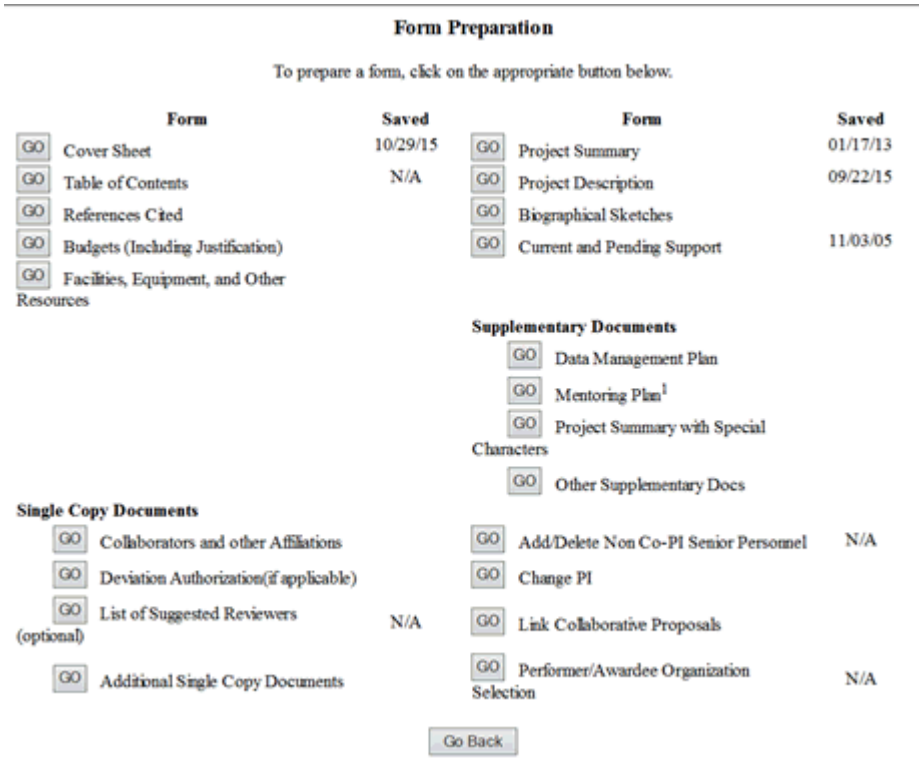

Figure 1 Form Preparation screen. The Go button for Link Collaborative Proposals is circled.

2. Click the **Go** button for Link Collaborative Proposals (Figure 1). The **Link Collaborative Temporary Proposals** screen displays (Figure 2).

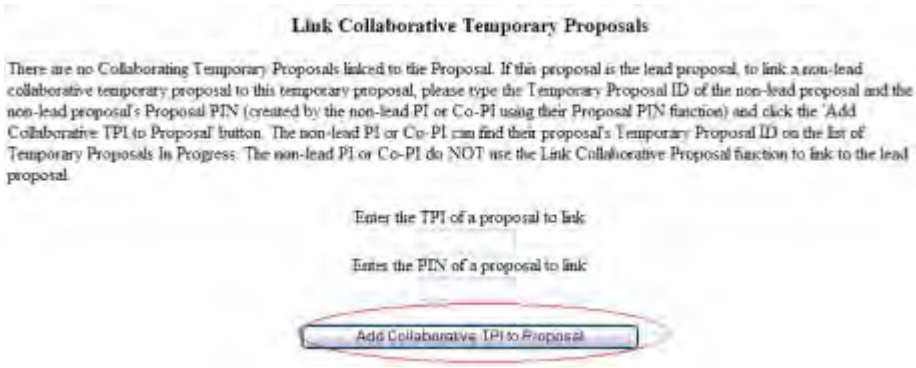

Figure 2 Link Collaborative Temporary Proposals screen. The Add Collaborative TPI to Proposal button is circled.

3. In the **Enter the TPI of a Proposal to Link** box (Figure 2), type the Temporary Proposal ID (TPI) of the temporary proposal to link.
4. In the **Enter the PIN of a Proposal to Link** box (Figure 2), type the PIN, which is provided by the PI for the collaborating proposal, of the collaborating temporary proposal to link.
5. Click the **Add Collaborative TPI to Proposal** button (Figure 2). A screen displays (Figure 3) with a message for you to confirm that you want to link the proposals.

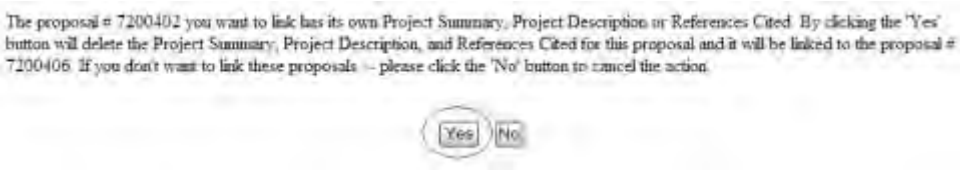

Figure 3 Screen with a message for you to confirm that you want to link a non-lead temporary proposal. The Yes button is circled.

6. Click the **Yes** button (Figure 3). The **Temp. Proposal Added** screen displays (Figure 4) with a message that the proposal is now linked.

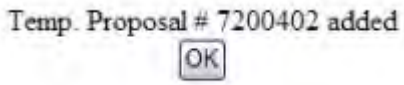

Figure 4 Temp. Proposal Added screen.

7. Click the **OK** button (Figure 4). The **Link Collaborative Temporary Proposals** screen displays (Figure 5) with the linked proposal now in a list of linked temporary proposals at the bottom of the screen. You now have the option to delete the link between the proposals.

Figure 5 Link Collaborative Temporary Proposals screen after you have linked a proposal. The section listing linked proposals is boxed.

Delete a Link Between Proposals

1. Access the **Form Preparation** screen (Figure 1) (see Create a New Proposal, Edit a Proposal, or Create a New Proposal from a Template).

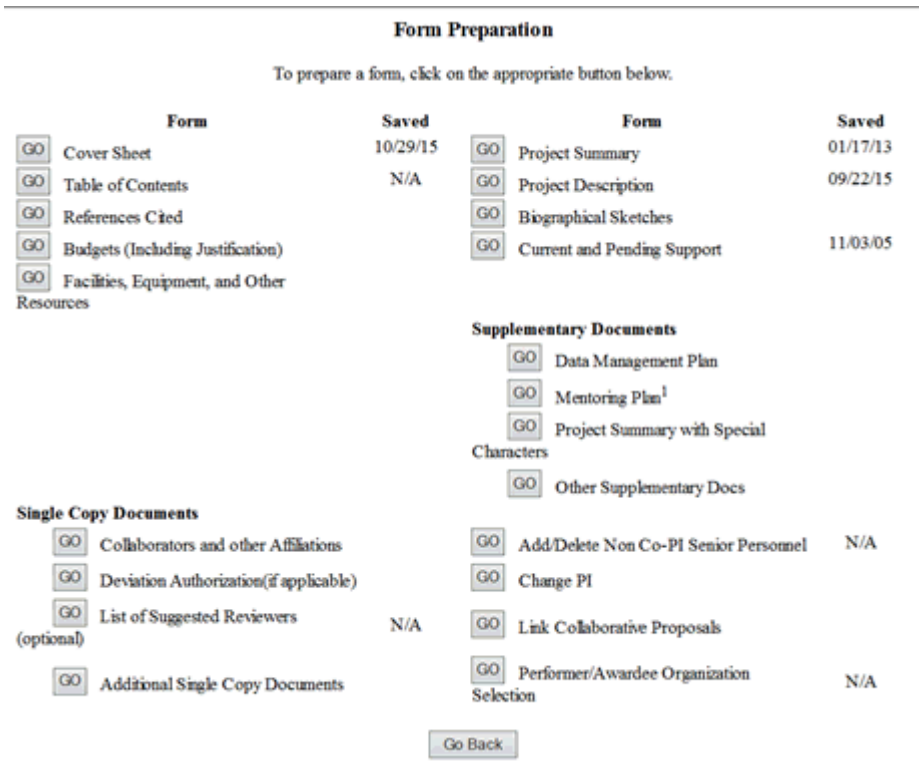

Figure 1 Form Preparation screen. The Go button for Link Collaborative Proposals is circled.

2. Click the **Go** button for Link Collaborative Proposals (Figure 1). The **Link Collaborative Temporary Proposals** screen displays (Figure 2).

Figure 2 Link Collaborative Temporary Proposals screen with the Temporary Proposal ID of a linked proposal highlighted. The Delete button is circled.

2. Highlight the Temporary Proposal ID of the proposal you want to delete (Figure 2).
3. Click the **Delete** button (Figure 2). The **Warning** screen displays (Figure 3) with a message for you to confirm that you want to delink the proposals.

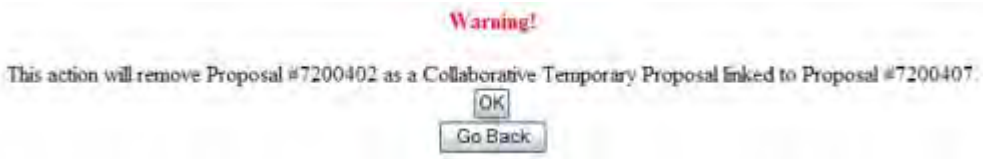

Figure 3 Warning screen with a message for you to confirm that you want to remove the proposal as a collaborative temporary proposal.

4. Click the **OK** button (Figure 3). A screen displays (Figure 4) with the message that the proposal has been delinked.

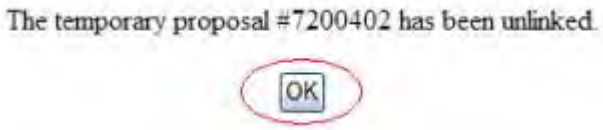

Figure 4 Screen with the message that the proposal has been delinked.

5. Click the **OK** button (Figure 3). The **Link Collaborative Temporary Proposals** screen displays with the unlinked proposal no longer in the list of linked proposals.

Proposal Classification Form

What Is the Proposal Classification Form?

If you are preparing an unsolicited proposal and designated an organizational unit in the Directorate for Biological Sciences (BIO) as your first or only choice of NSF organizational units, you *must* complete the Proposal Classification Form.

Note: The Proposal Classification Form does not appear on the **Form Preparation** screen automatically. You must first fill out the first three components of the Cover Sheet for the **Proposal Classification Form** screen to become accessible. See Access the Proposal Classification Form.

The Proposal Classification Form provides data for the accelerated processing of the proposal for the purpose of generating reports about the research that BIO reviews.

The table below indicates what information the Proposal Classification Form requires and why NSF needs the information. (Click on a link below for instructions for that part of the form.)

No.	Category Title	What Is It?	Why Does NSF Need It?
I	Investigator Status	Select the current status of the PI or Co-PI on federal grants.	Assists analysis of research requests as they may relate to current or past federal funding
II	Fields of Science Other Than Biology	Select major scientific fields, in addition to biology, involved in the proposed research.	Indicates the type and extent of interdisciplinary research reviewed in BIO
III	Substantive Area	Select broad or thematic areas or experimental systems related to the proposed research; BIO has no preference.	Enables BIO to monitor activity in these areas for generating reports on the research reviewed
IV	Infrastructure	Select infrastructure, including material, intellectual, and human resources necessary to facilitate progress in the biological research.	Assists analysis of the adequacy of current infrastructure and identifying future infrastructural needs
V	Habitat	Indicate the habit in which the experimental system being studied is normally found.	Assists analysis of the environmental breadth of the research reviewed in BIO
VI	Geographic Area of Research	Indicate research-related region (not the location of your organization).	Provides data on geographic distribution of regions and organisms involved in research reviewed in BIO
VII	Classification of Organisms	Indicate the most specific taxonomic category represented in the research. Check the next-higher level if the appropriate taxonomic level is absent.	Assists analysis of the biological diversity of research reviewed in BIO
VIII	Model Organism	Indicate traditional laboratory model species.	Gives an estimate of how frequently traditional laboratory species are used in research requests

You must choose at least one descriptor in each of the categories listed unless the form indicates **No Selection Required**. Choose the most specific descriptors.

If no descriptors apply for the proposal, select **Not Appropriate** or **None of the Above**.

If you have further questions, direct your queries to BIO as follows:

- For procedural questions on instructions for the Proposal Classification Form, contact the Information and Automation Resources Unit, BIO at biofl@nsf.gov.
- For questions on the substance and scientific review of the proposal, contact the relevant NSF Program Officer.
- For information on BIO, its staff, and related programs, click http://www.nsf.gov/bio to go to the BIO Web site.

See also:

- Cover Sheet
- Table of Contents
- References Cited
- Budgets (Including Justification)
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Access the Proposal Classification Form

The Proposal Classification Form does not appear on the **Form Preparation** screen automatically. You must first establish that the proposal is for an organizational unit of the Directorate for Biological Sciences (BIO). To do this, you must complete the first three components of the Cover Sheet for the proposal:

- Awardee Organization/Primary Place of Performance
- Program Announcement/Solicitation Number Selection
- NSF Unit Consideration

After you have filled out these required parts of the Cover Sheet, the Proposal Classification Form displays on the **Form Preparation** screen. You can then access the form and complete it.

Complete the Three Required Cover Sheet Components

1. Access the **Form Preparation** screen (Figure 1) (see Create a New Proposal, Edit a Proposal, or Create a New Proposal from a Template).

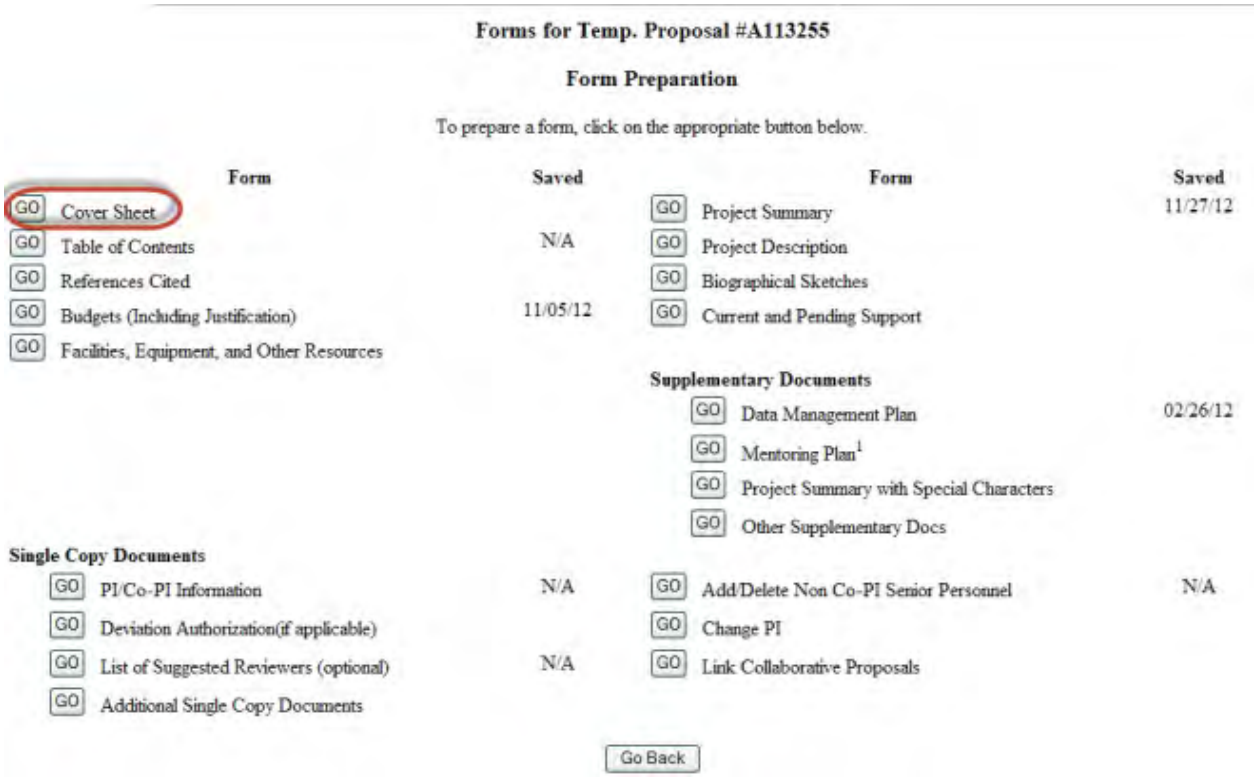


Figure 1 Form Preparation screen. The Go button for the Cover Sheet is circled.

2. Click the **Go** button for Cover Sheet (Figure 1). The **Cover Sheet Components Form** screen displays (Figure 2).

Cover Sheet Components Form

The NSF Cover Sheet within FastLane has been divided into 3 sections:

- Program Announcement / Solicitation Number Selection
- NSF Unit Consideration
- Remainder of Cover Sheet

To complete a section, click on the Go button, and click on OK to save the data.

GO Awardee Organization/Primary Place Of Performance Selection

Awardee Organization	Primary Place of Performance
National Science Foundation	

Address

Arlington, VA 222301000

Time Zone US-America/New_York(GMT-5:00)

Inst. Code 4102852000

DUNS # 074811803

GO Program Announcement / Solicitation / Program Description No., or In response to Proposal & Award Policies & Procedures Guide (PAPPG).

No Program Announcement has been selected yet.
*You must select one or the PAPPG prior to filling out the rest of the Cover Sheet

GO NSF Unit Consideration
No NSF Units have been selected yet.
*You must select one prior to filling out the rest of the Cover Sheet

GO *Remainder of the Cover Sheet

Go Back

Figure 2 Cover Sheet Components Form screen. Boxed are the three components you must complete to access the Proposal Classification Form.

3. Click the **Go** button for Awardee Organization/Primary Place of Performance (Figure 2).
4. See Awardee Organization/Primary Place of Performance for instructions on how to complete the Awardee Organization/Primary Place of Performance component.
5. Click the **Go** button for Program Announcement/Solicitation Number Selection (Figure 2). The **Program Announcement Solicitation Number Selection** screen displays (Figure 3).

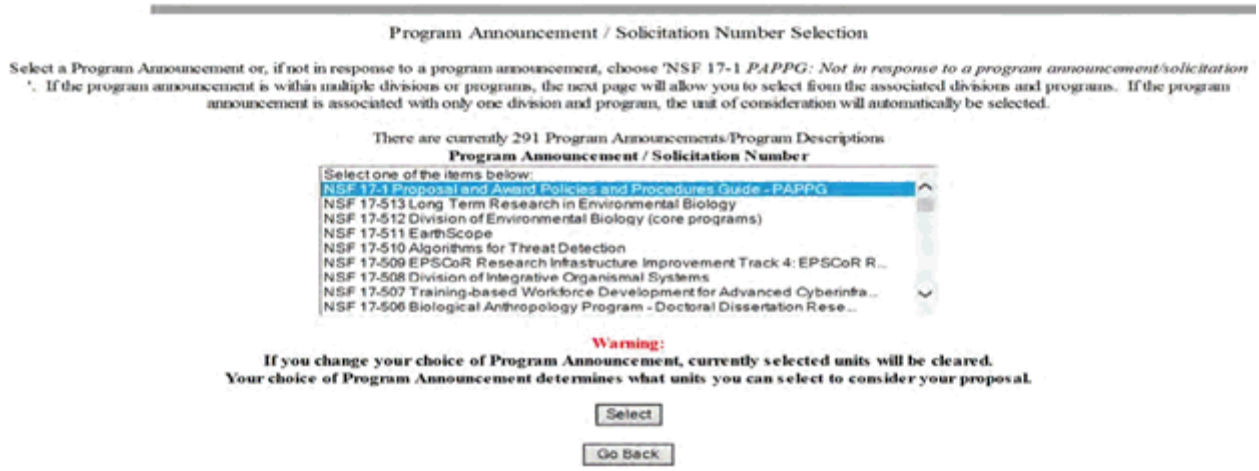


Figure 3 Program Announcement / Solicitation Number Selection screen. The GPG Grant Proposal Guide selection and the Select button are circled.

6. Highlight **GPG Grant Proposal Guide** in the **Program Announcement / Solicitation Number** list (Figure 3).
7. Click the **Select** button (Figure 3). The **Unit Selection Lists** screen displays (Figure 4).

Figure 4 Unit Selection Lists screen. The Directorate BIO and the Select Division button are circled.

8. In the **Divisions** list (Figure 4), scroll through the divisions to highlight your division under the Directorate BIO heading from the **Divisions** list.
9. Click the **Select Division** button (Figure 4). The division you selected displays in the **Divisions** list, and the **Programs** list for that division displays (Figure 5).

Figure 5 Unit Selection Lists screen with a program highlighted. The Select Program button is circled.

10. Highlight a program from the **Programs** list (Figure 5).
11. Click the **Select Program** button (Figure 5). The **Current List of Selected NSF Units** screen displays (Figure 6) showing the unit that was selected for the program.

Figure 6 Unit Selections List screen. Current List of Selected NSF Units section is boxed.

12. Click the **Go Back** button (Figure 6). The **Cover Sheet Components Form** screen displays (Figure 7) with your selections displayed.

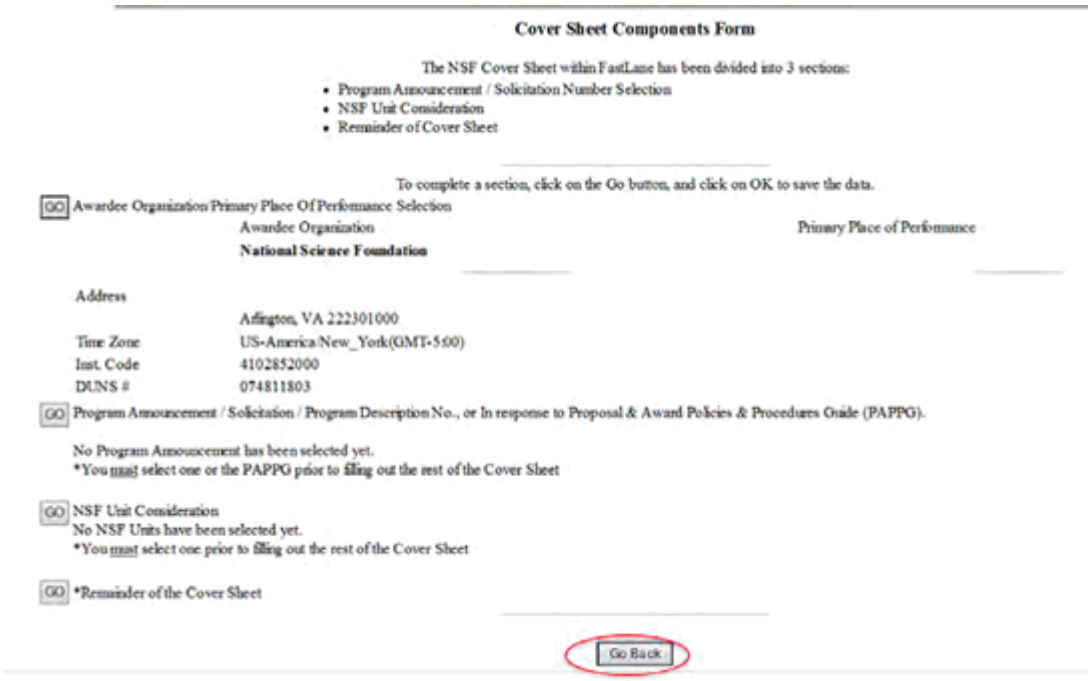


Figure 7 Cover Sheet Components Form screen. The Go Back button is circled.

13. Click the **Go Back** button (Figure 7). The **Form Preparation** screen displays (Figure 8) with the Proposal Classification form now in the list of proposal forms.

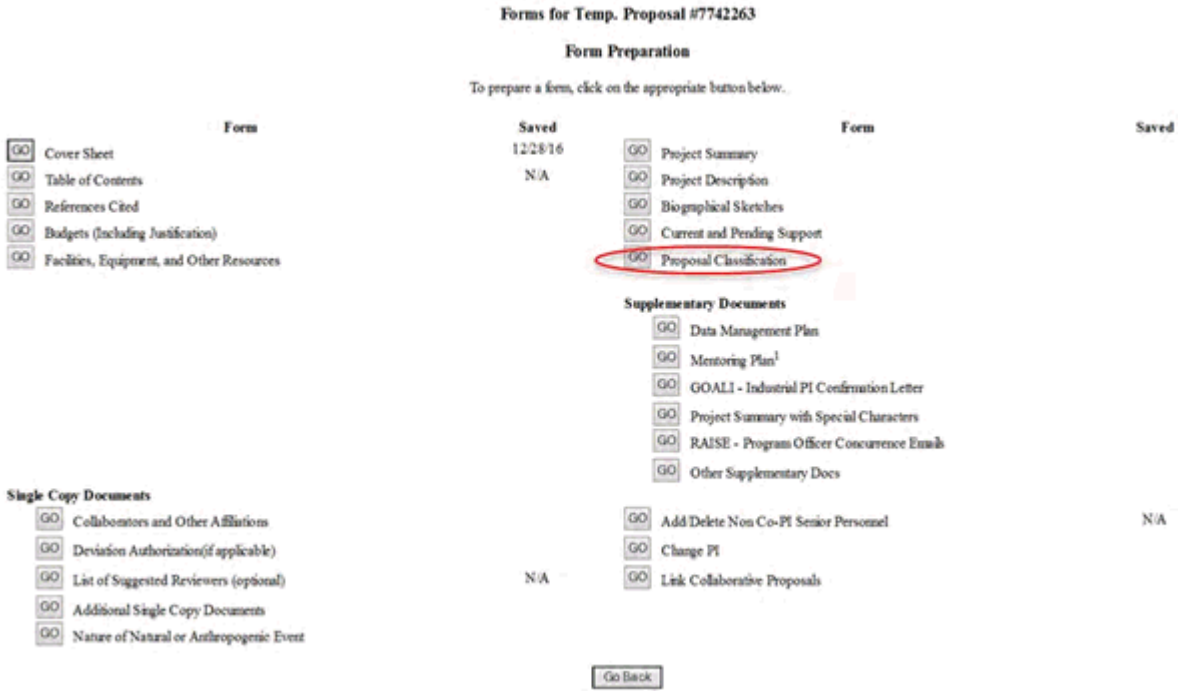


Figure 8 Form Preparation screen. The Go button for Proposal Classification form is circled.

14. Click the **Go** button for Proposal Classification (Figure 8). The **Proposal Classification Form** screen displays (Figure 9). See Work on the Proposal Classification Form.

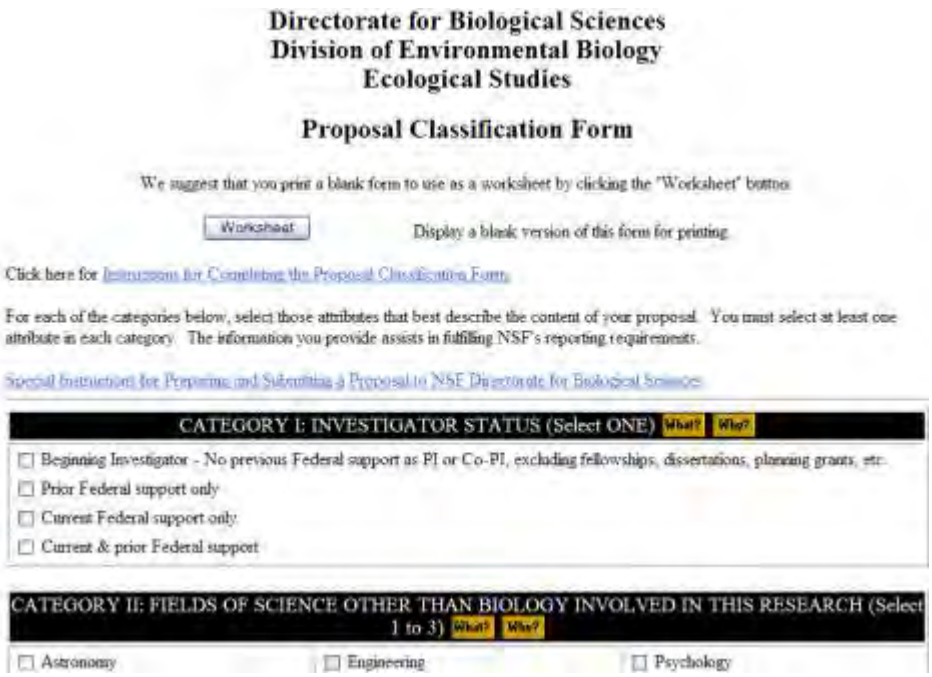


Figure 9 Upper portion of the Proposal Classification Form screen.

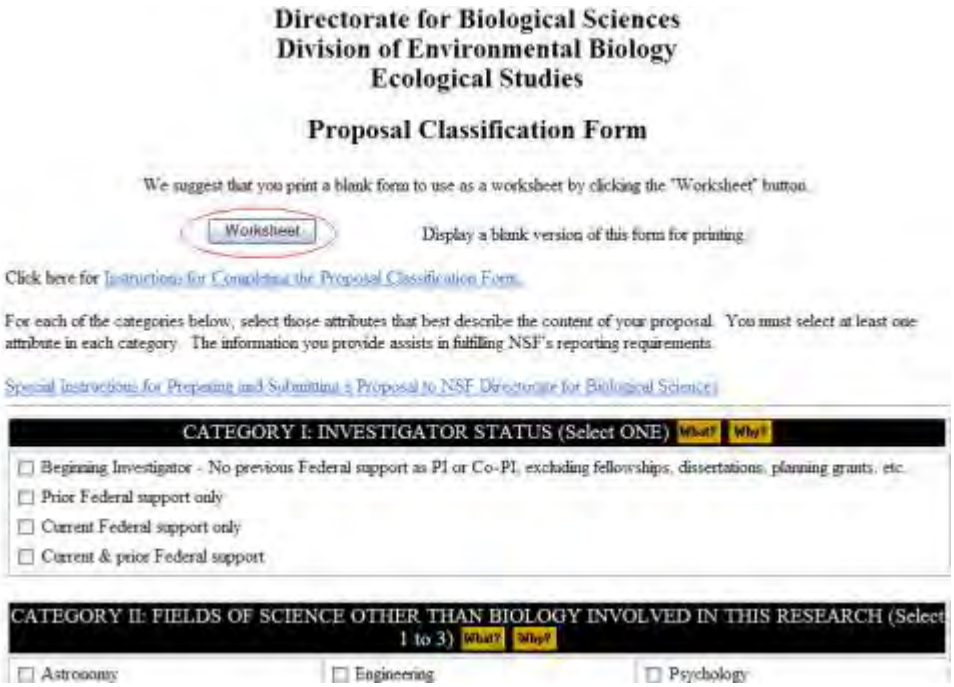
Work on the Proposal Classification Form

The Proposal Classification form is a long form. To help you complete the form, you have these options on the Proposal Classification Form:

- Print the Proposal Classification Form to gain an overview of the form and what you need to complete it.
- Check the What and Why for each category.
- Save the Proposal Classification Form for the proposal for further work in the future

Print the Proposal Classification Form

1. Access the **Proposal Classification Form** screen (Figure 1) (see Access the Proposal Classification Form).



Directorate for Biological Sciences
Division of Environmental Biology
Ecological Studies

Proposal Classification Form

We suggest that you print a blank form to use as a worksheet by clicking the "Worksheet" button.

Worksheet — Display a blank version of this form for printing.

Click here for Instructions for Completing the Proposal Classification Form.

For each of the categories below, select those attributes that best describe the content of your proposal. You must select at least one attribute in each category. The information you provide assists in fulfilling NSF's reporting requirements.

Special Instructions for Preparing and Submitting a Proposal to NSF Directorate for Biological Sciences

CATEGORY I: INVESTIGATOR STATUS (Select ONE) What? Why?

- ☐ Beginning Investigator - No previous Federal support as PI or Co-PI, excluding fellowships, dissertations, planning grants, etc.
- ☐ Prior Federal support only
- ☐ Current Federal support only
- ☐ Current & prior Federal support

CATEGORY II: FIELDS OF SCIENCE OTHER THAN BIOLOGY INVOLVED IN THIS RESEARCH (Select 1 to 3) What? Why?

☐ Astronomy ☐ Engineering ☐ Psychology

Figure 1 Upper portion of the Proposal Classification Form screen. The Worksheet button is circled.

2. Click the **Worksheet** button (Figure 1). The entire form displays in PDF format (Figure 2). If you need to download Adobe Reader, see Adobe Reader for FastLane.

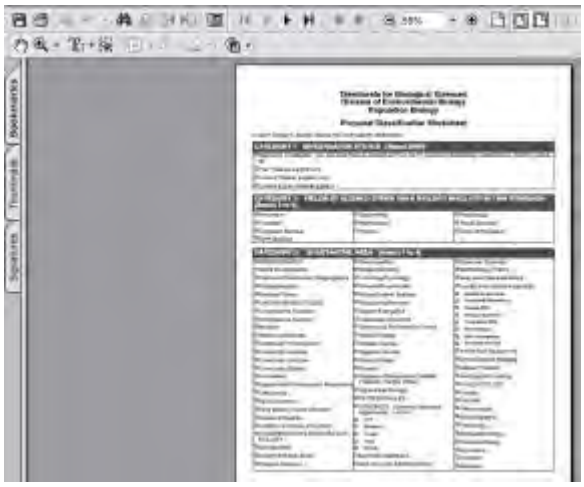


Figure 2 Proposal Classification Form in PDF format.

3. Click the **Print** icon on the upper left of the PDF toolbar (Figure 2). The Proposal Classification form prints.
4. Click the browser back button to return to the **Proposal Classification Form** screen (Figure 1).

Check the What and Why for Each Category

The eight categories of the Proposal Classification Form display in succession on the **Proposal Classification Form** screen. For each category, you can:

- Click the **What** button to find out what information NSF is seeking for that category (as for Category IV shown in Figure 3).
- Click the **Why** button to find out why NSF needs the information (as for Category IV shown in Figure 3).

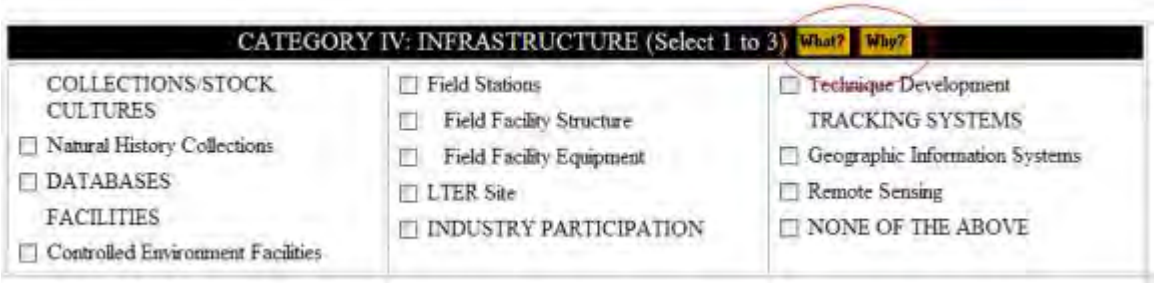


Figure 3 Category IV section of the Proposal Classification screen. The What button and the Why button are circled.

Save the Proposal Classification Form

When you are finished working on the form, at the bottom of the **Proposal Classification Form** screen (Figure 4), you have these options:

- Save the responses
- Cancel changes
- Clear all entries

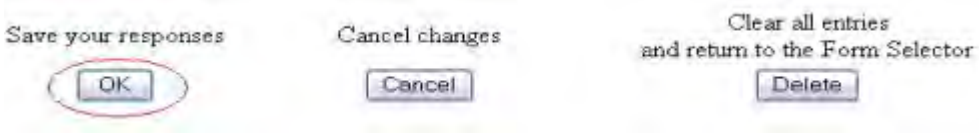
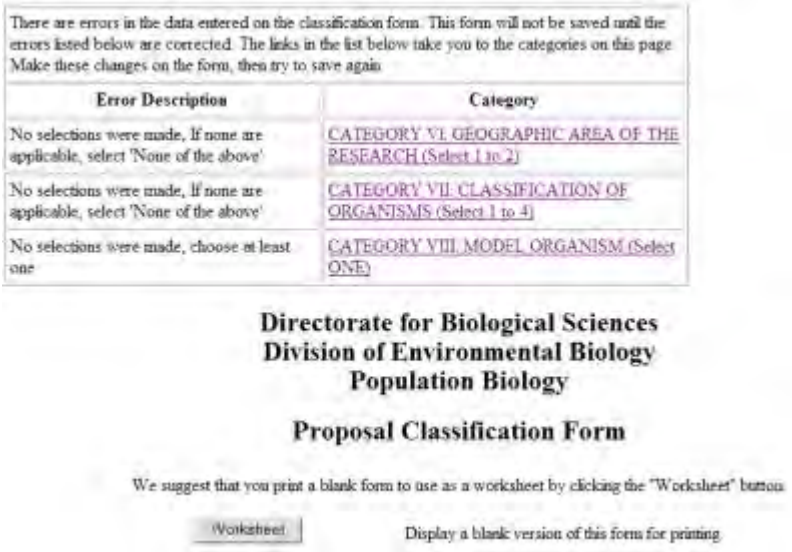


Figure 4 Lower portion of the Proposal Classification Form screen with the option buttons. The OK button is circled.

Save the Responses

At the bottom of the **Proposal Classification Form** screen (Figure 4), click the **OK** button. FastLane saves the changes. If you have not completed the form, the **Proposal Classification** screen displays (Figure 5) with a message at the top of the screen on what you must do to complete the form for submission.



There are errors in the data entered on the classification form. This form will not be saved until the errors listed below are corrected. The links in the list below take you to the categories on this page. Make these changes on the form, then try to save again.

Error Description	Category
No selections were made, If none are applicable, select 'None of the above'	CATEGORY VI. GEOGRAPHIC AREA OF THE RESEARCH (Select 1 to 2)
No selections were made, If none are applicable, select 'None of the above'	CATEGORY VII. CLASSIFICATION OF ORGANISMS (Select 1 to 4)
No selections were made, choose at least one	CATEGORY VIII. MODEL ORGANISM (Select ONE)

Directorate for Biological Sciences
Division of Environmental Biology
Population Biology

Proposal Classification Form

We suggest that you print a blank form to use as a worksheet by clicking the "Worksheet" button.

Worksheet Display a blank version of this form for printing

Figure 5 Upper portion of the Proposal Classification Form screen with a message on any changes that must be made for the form to be ready for submission to NSF.

Cancel Changes

1. At the bottom of the **Proposal Classification Form** screen (Figure 4), click the **Cancel** button. A screen displays with a message that the form has been saved, although any new changes you have made in this session are deleted.
2. Click the **OK** button. The **Form Preparation** screen displays.

Clear All Entries

1. At the bottom of the **Proposal Classification Form** screen (Figure 4), click the **Delete** button. A screen displays with the message that the form has been cleared of all entries.
2. Click the **OK** button. The **Form Preparation** screen displays.

Fill Out the Proposal Classification Form

1. Access the **Proposal Classification Form** screen (Figures 1 through 9) (see Access the Proposal Classification Form).

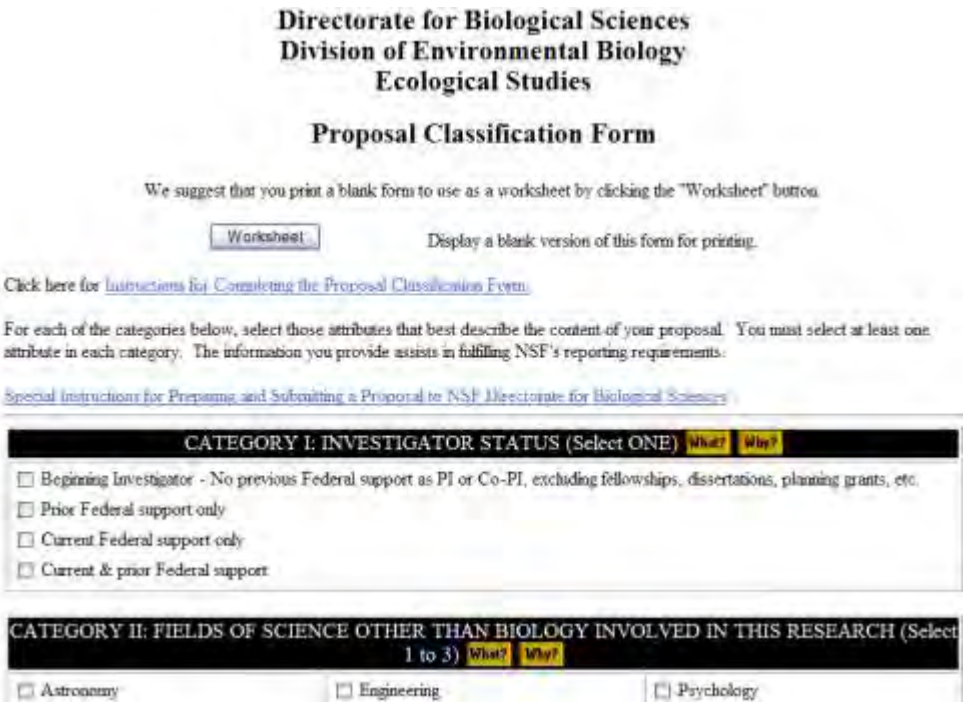


Figure 1 Upper portion of the Proposal Classification Form screen.

2. For Category I (Figure 2), click the radio button for the appropriate selection for investigator status. Select one item.

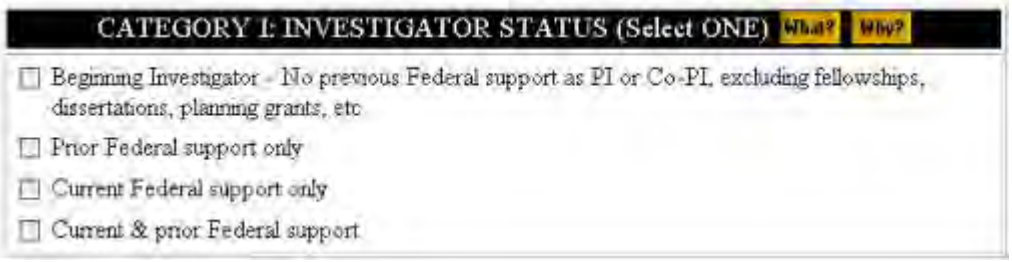


Figure 2 Category I: Investigator Status.

3. For Category II (Figure 3), select the radio button for the appropriate selection for fields of science other than biology involved in the research. You may select one to three items.

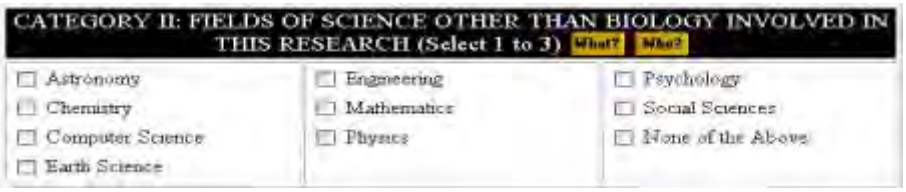


Figure 3 Category II: Fields of Science Other Than Biology.

4. For Category III (Figure 4), select the radio button for the appropriate selection for substantive area. You may select one to four items.

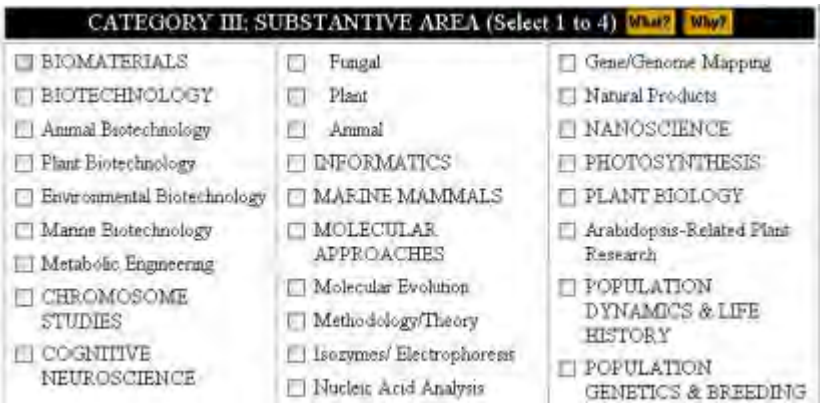


Figure 4 Category III: Substantive Area.

5. For Category IV (Figure 5), select the radio button for the appropriate selection for infrastructure. You may select one to three items.

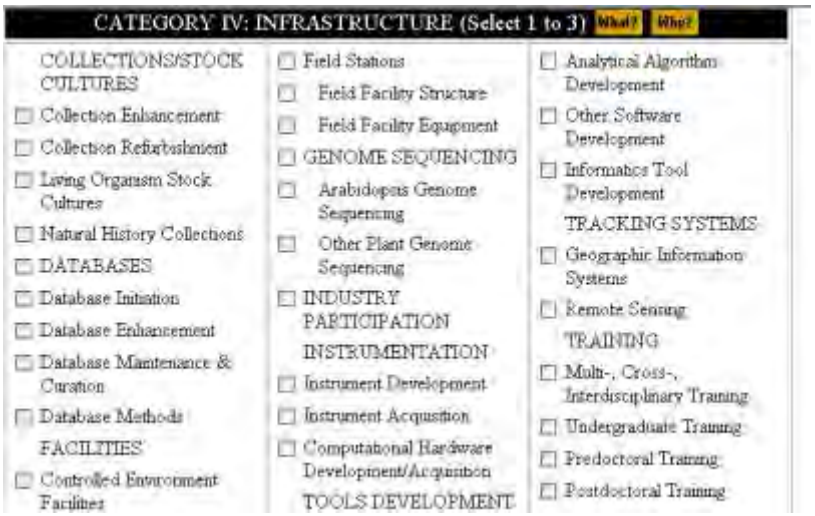


Figure 5 Category IV: Infrastructure.

6. For Category V (Figure 6), select the radio button for the appropriate selection for habitat. You may select one to two items.

Figure 6 Category V: Habitat.

7. For Category VI (Figure 7), select the radio button for the appropriate selection for geographic area of the research. You may select one to two items.

Figure 7 Category VI: Geographic Area of the Research.

8. For Category VII (Figure 8), select the radio button for the appropriate selection for classification of organisms. You may select one to four items.

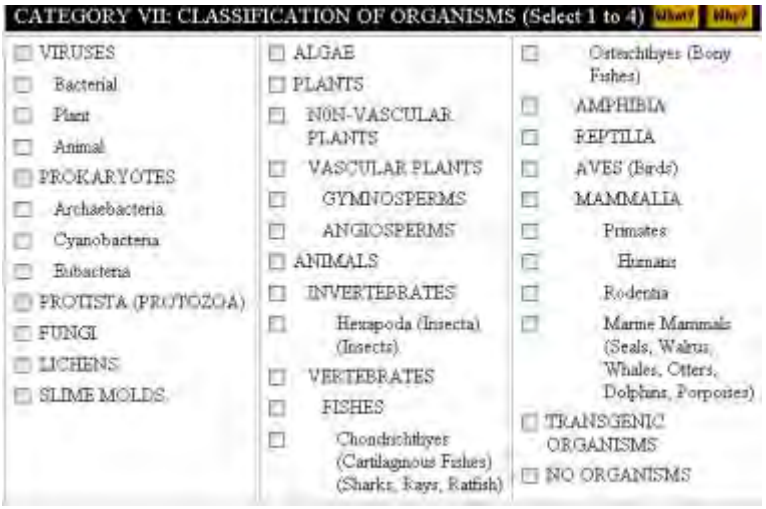


Figure 8 Category VII: Classification of Organisms.

9. For Category VIII (Figure 9), select the radio button for the appropriate selection for model organism. Select one.

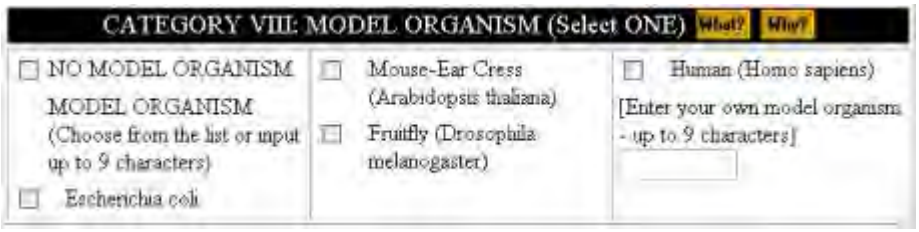


Figure 9 Category VIII: Model Organism.

Submit and Sign a Proposal

Sign and Submit a Proposal Introduction

Print the contents of the Submit and Sign a Proposal book.

Submitting a proposal to NSF
(AOR) to provide the proposal certifications concurrently with submission of the proposal.

Reviewing a Proposal

In Research Administration, the Sponsored Projects Office (SPO) can View/Edit or Return the Proposal back to the PI.
In Research Administration, the Authorized Organizational Representative (AOR) signs and submits the proposal to NSF electronically.

In Research Administration, the SPO can perform these functions in the Proposals/Supplements/File Updates/Withdrawals section of Research Administration:

- Check a proposal for completeness
- Edit a proposal
- Return a proposal to the PI
- View and print a submitted proposal

Signing and Submitting a Proposal

In Research Administration, the Authorized Organizational Representative (AOR) can perform these functions in the Proposals/Supplements/File Updates/Withdrawals section of Research Administration:

- Check a proposal for completeness
- Edit a proposal
- Return a proposal to the PI
- View and print a submitted proposal
- Submit a proposal

Sign and Submit a Proposal Introduction

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- View and print a submitted proposal

Signing and Submitting a Proposal

In Research Administration, the Authorized Organizational Representative (AOR) can perform these functions in the Proposals/Supplements/File Updates/Withdrawals section of Research Administration:

- Check a proposal for completeness
- Edit a proposal
- Return a proposal to the PI
- View and print a submitted proposal
- Submit a proposal

Check a Proposal for Completeness as an SPO/AOR

1. On the **FastLane Home Page** screen, log in to Research Administration as an SPO (see SPO/AOR Login). The **Research Administration** screen displays (Figure 1).

Figure 1 Research and Administration screen. The Proposals/Supplements/File Updates/Withdrawals link is circled.

2. Click **Proposals/Supplements/File Updates/Withdrawals** (Figure 1). The **Proposals/Supplements/File Updates/Withdrawals** screen displays on the **Documents in Progress** tab (Figure 2).

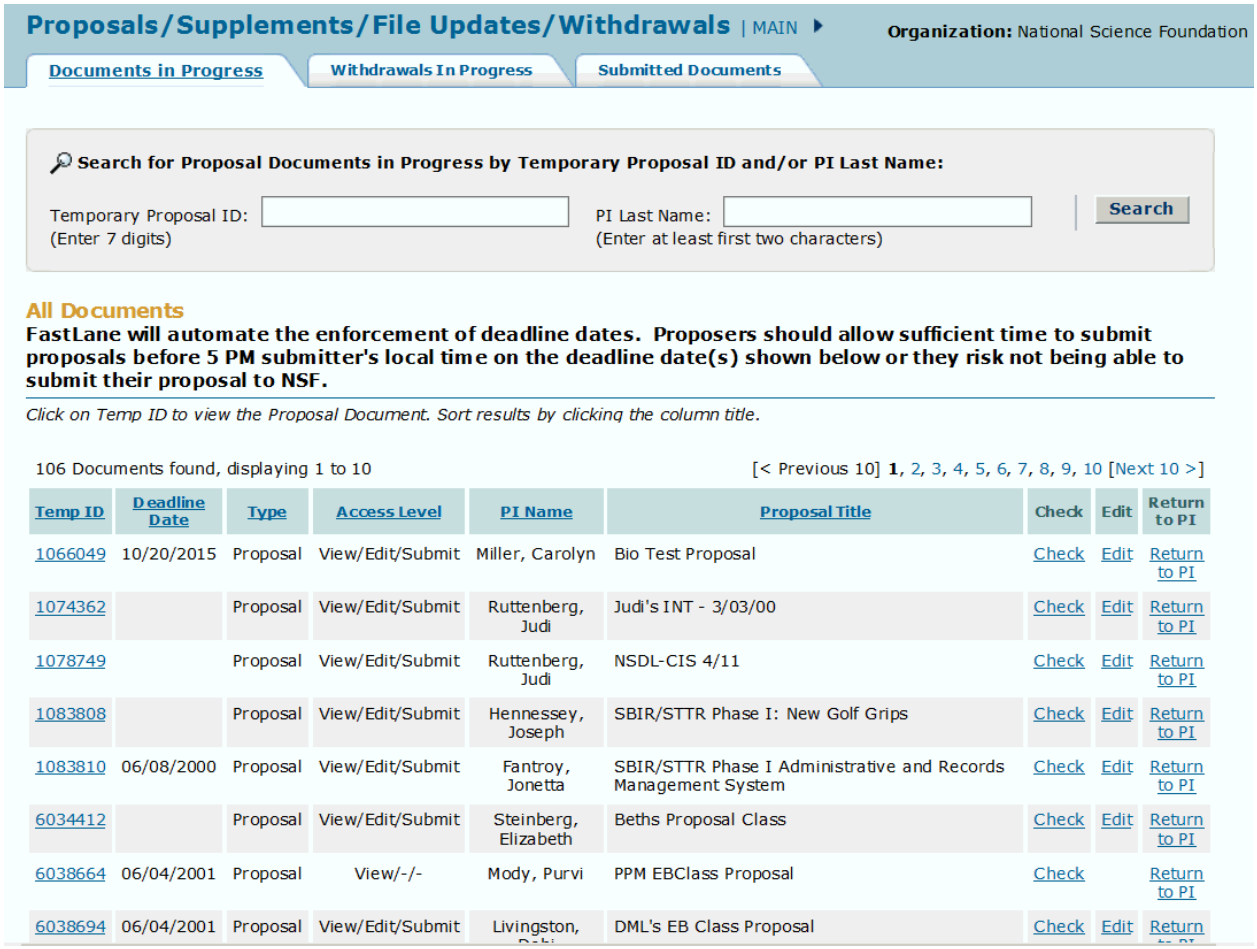

Figure 2 Proposals/Supplements/File Updates/Withdrawals screen on the Documents in Progress tab. The Check link is circled.

3. Find the proposal whose readiness you want to check (Figure 2). You can sort the documents by clicking on one of the column heads:
   - **Temp ID** groups the documents in succession by Temp ID number.
   - **Type** groups the documents by type, proposals, supplements, file updates, and withdrawals.
   - **Access Level** groups the documents by the access level the PI has granted to you.
   - **PI Name** groups the documents by the PI assigned to the document.
   - **Proposal Title** groups the documents alphabetically by title.
4. Click the **Check** link on the row for the proposal you want to check (Figure 2). The **Proposal Errors/Warnings** screen (Figure 3) is displayed with a list of proposal items that have not been completed. To make changes, see Edit a Proposal as an SPO/AOR.

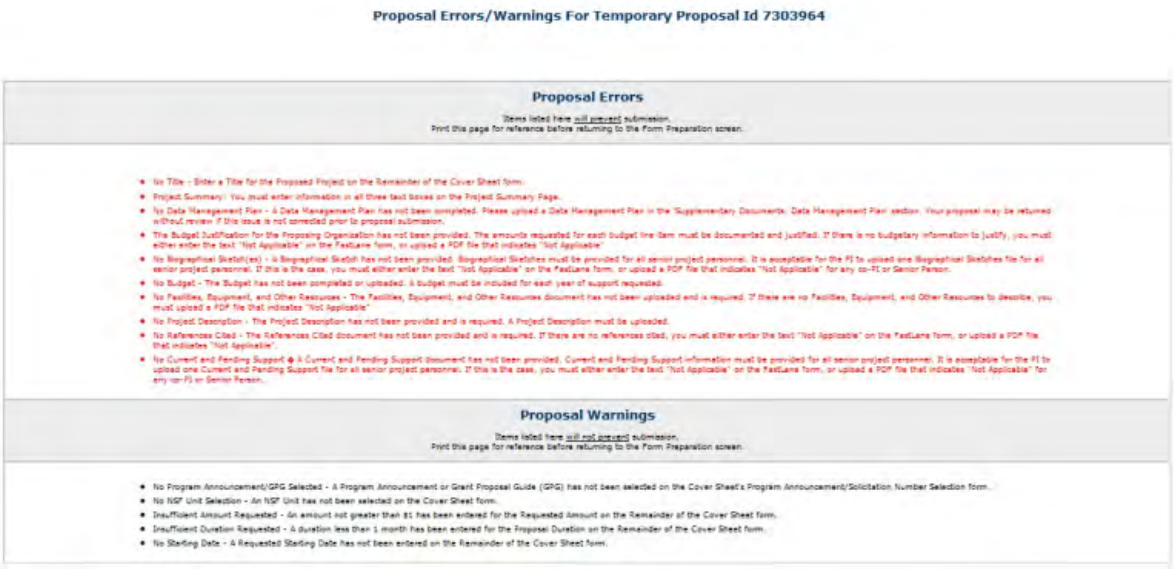

Figure 3 Proposal Errors / Warnings screen.

Edit a Proposal as an SPO / AOR

1. On the **FastLane Home Page** screen, log in to Research Administration as an SPO (see SPO/AOR Login). The **Research Administration** screen displays (Figure 1).

Figure 1 Research Administration screen. The Proposals / Supplements / File Updates / Withdrawals link is circled.

2. Click **Proposals / Supplements / File Updates / Withdrawals** (Figure 1). The **Proposals / Supplements / File Updates / Withdrawals** screen displays at the **Documents in Progress** tab (Figure 2).

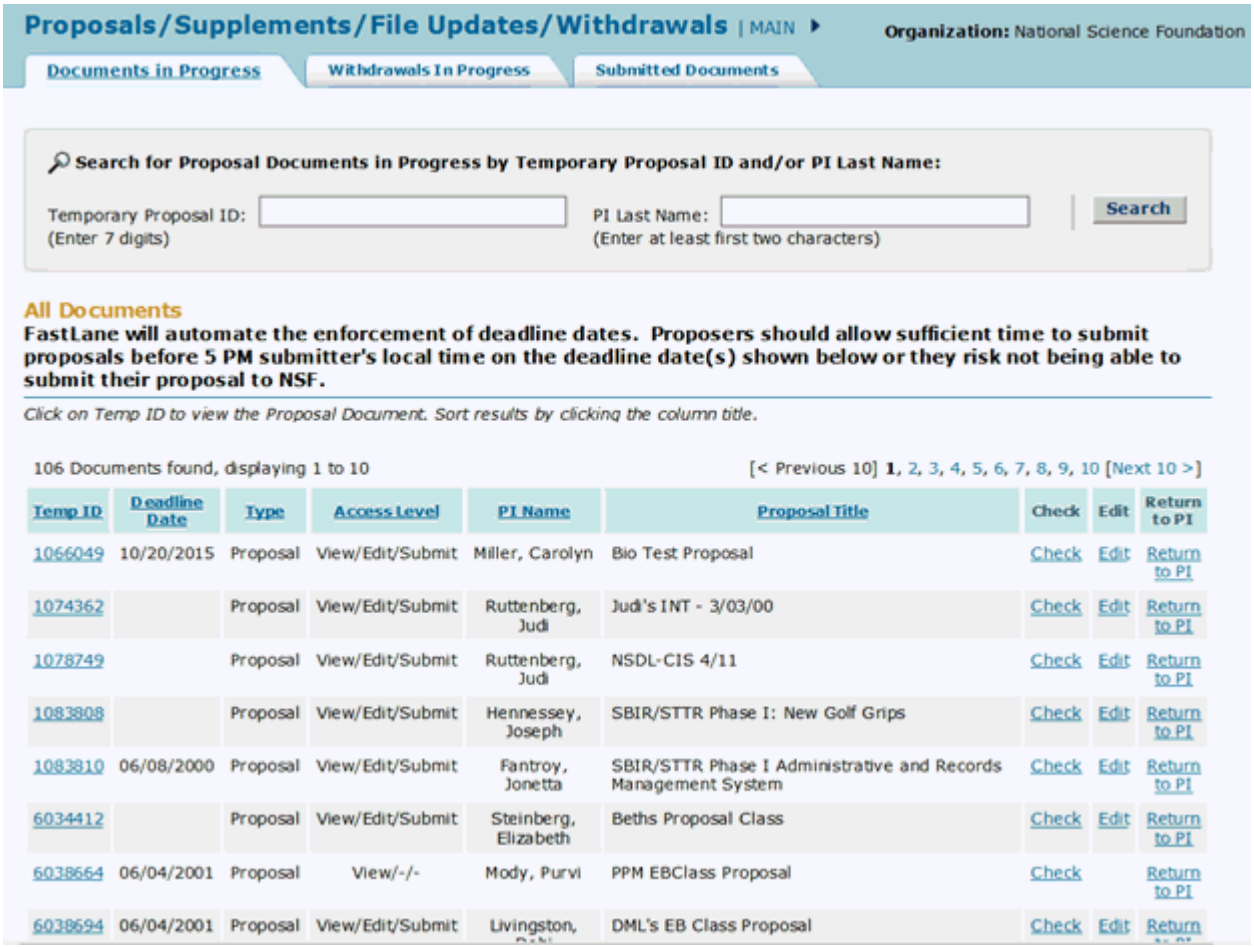

Figure 2 Proposals / Supplements / File Updates / Withdrawals screen on the Documents in Progress tab. Select the Edit link.

3. Click **Edit** in the row for the proposal you want to edit (Figure 2). The **Form Preparation** screen displays (Figure 3) for that proposal.

Forms for Temp. Proposal #7742436

Form Preparation

To prepare a form, click on the appropriate button below.

	Form	Saved		Form	Saved
GO	Cover Sheet	01/12/17	GO	Project Summary	01/12/17
GO	Table of Contents	N/A	GO	Project Description	
GO	References Cited		GO	Biographical Sketches	
GO	Budgets (Including Justification)		GO	Current and Pending Support	01/12/17
GO	Facilities, Equipment, and Other Resources				

Supplementary Documents

GO Data Management Plan

GO Mentoring Plan[1]

GO GOALI - Industrial PI Confirmation Letter

GO Project Summary with Special Characters

GO RAISE - Program Officer Concurrence Emails

GO Other Supplementary Docs

Single Copy Documents

GO	Collaborators and Other Affiliations		GO	Add/Delete Non Co-PI Senior Personnel	N/A
GO	Deviation Authorization(if applicable)		GO	Change PI	
GO	List of Suggested Reviewers (optional)	N/A	GO	Link Collaborative Proposals	
GO	Additional Single Copy Documents				
GO	Nature of Natural or Anthropogenic Event				

Go Back

Figure 3 Form Preparation screen for the proposal you selected to edit.

4. See Prepare Proposal Forms for instructions on how to work on all the forms in the **Form Preparation** screen (Figure 3).

Submit a Proposal to NSF (AOR only)

If a proposal is ready for submission to NSF, the AOR may submit it via NSF's electronic systems. (See Check a Proposal for Completeness for instructions on how to check the proposal for its readiness for submission.)

1. On the **FastLane Home Page** screen, log in to Research Administration (see SPO/AOR Login). The **Research Administration** screen displays (Figure 1).

Figure 1 Research Administration screen. The Proposals/Supplements/File Updates/Withdrawals link is circled.

2. Click **Proposals/Supplements/File Updates/Withdrawals** (Figure 1). The **Proposals/Supplements/File Updates/Withdrawals** screen displays on the **Documents in Progress** tab (Figure 2).

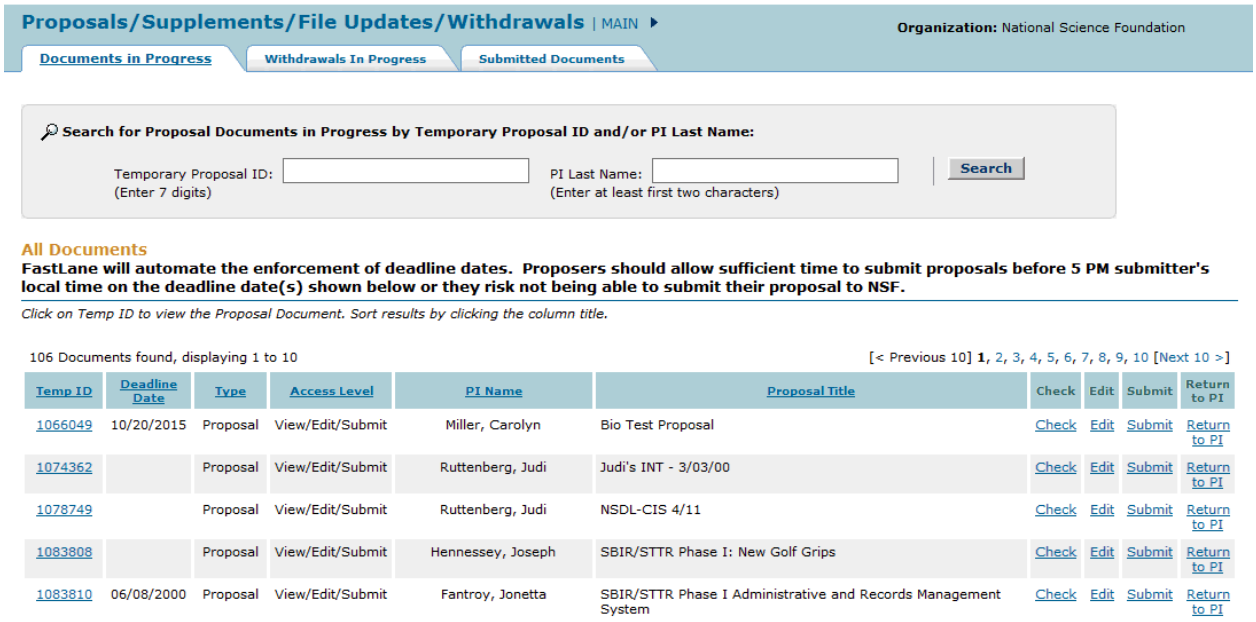

Figure 2 Proposals/Supplements/File Updates/Withdrawals screen on the Documents in Progress tab. The Submit link is circled.

3. Click **Submit** in the row for the proposal you want to submit (Figure 2). The **Proposal Errors / Warnings** screen displays (Figure 3) giving you the capability to submit the proposal, if there are no errors that prohibit submission. You can either submit the proposal or submit and also sign the proposal.

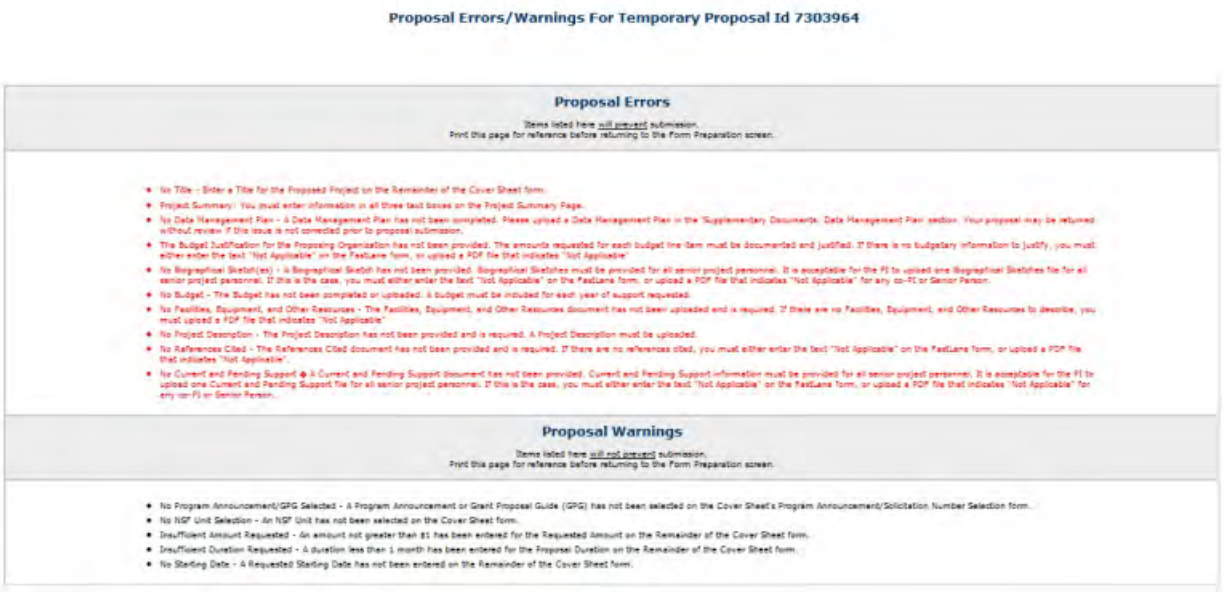

Figure 3 Upper portion of the Proposal Errors / Warnings screen for the proposal if the proposal is ready for submission.

Sign and Submit the Proposal

If you have AOR permissions, you have the capability to sign and submit the proposal.

1. In the **Debarment and Suspension** section of the **Proposal Errors / Warnings** screen (Figure 4), click the radio button for Yes or No if there are any debarments or suspensions of you or of your organization from transactions with federal agencies.

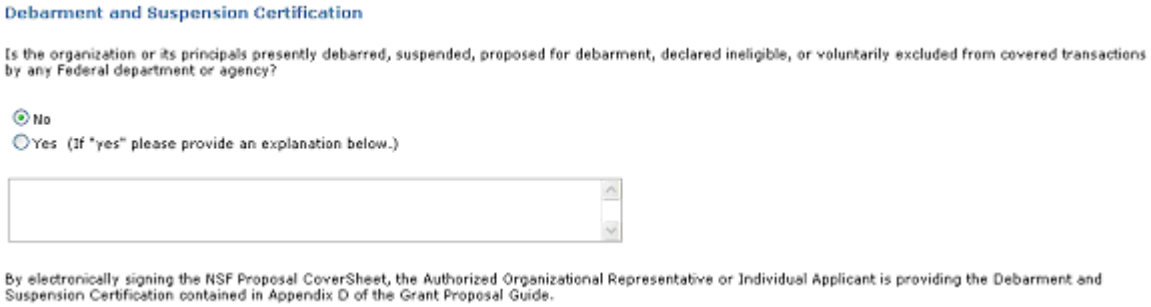

Figure 4 Debarment and Suspension Certification section of the Proposal Errors / Warnings screen.

2. *If you answered Yes,* in the text box under the radio buttons (Figure 4), type an explanation.
3. In the **Institution Information** section of the **Proposal Errors / Warnings** screen (Figure 5), check the accuracy of the information for your organization.

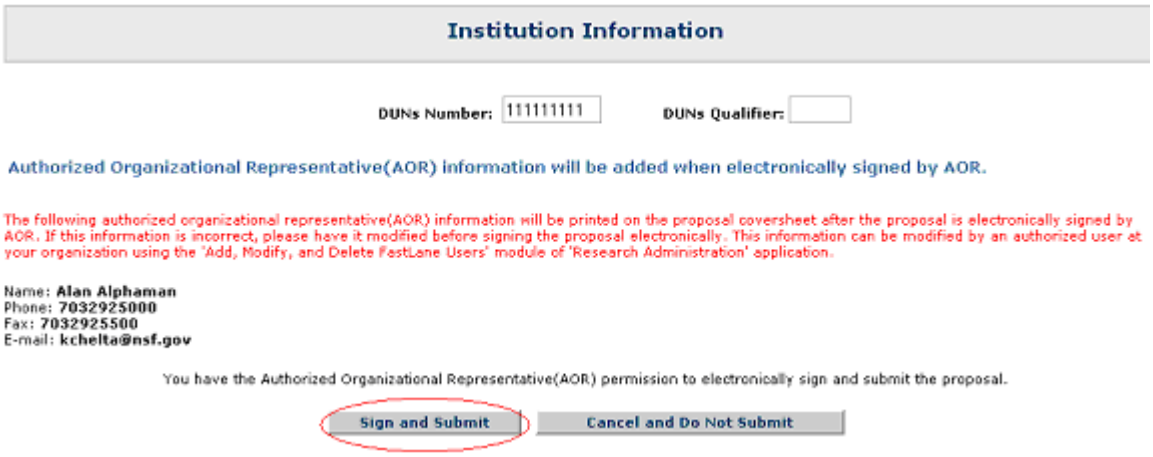

Figure 5 Institution Information section of the Proposal Errors / Warnings screen. The Sign and Submit button is circled.

4. At the bottom of the **Proposal Errors / Warnings** screen (Figure 5), click the **Sign and Submit** button. The **Proposal Submission Confirmation** screen displays (Figure 6) with a message that the proposal has been successfully submitted to NSF. It also displays the official NSF number for the proposal.

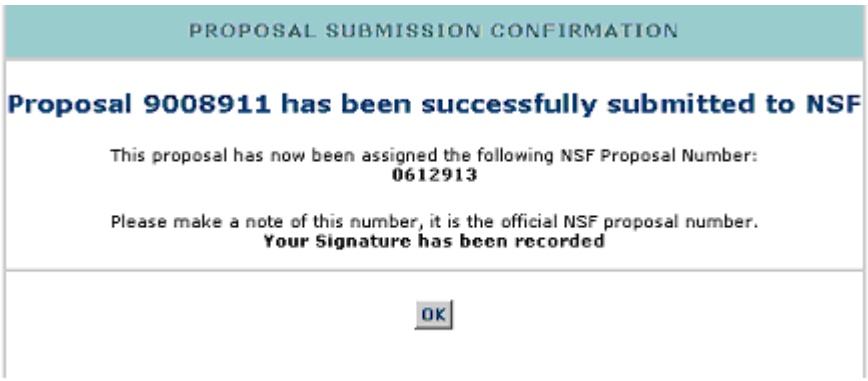

Figure 6 Proposal Submission Confirmation screen with the message that the proposal has been submitted to NSF and with the NSF number for the proposal.

5. Write down the NSF proposal number.
6. Click the **OK** button (Figure 6). The **Proposals / Supplements / File Updates / Withdrawals** screen displays on the **Documents in Progress** tab (Figure 2).

Return a Proposal to the PI

1. On the **FastLane Home Page** screen, log in to Research Administration (see SPO/AOR Login). The **Research Administration** screen displays (Figure 1).

Figure 1 Research Administration screen. The Proposals/Supplements/File Updates/Withdrawals link is circled.

2. Click **Proposals/Supplements/File Updates/Withdrawals** (Figure 1). The **Proposals/Supplements/File Updates/Withdrawals** screen displays on the **Documents in Progress** tab (Figure 2).

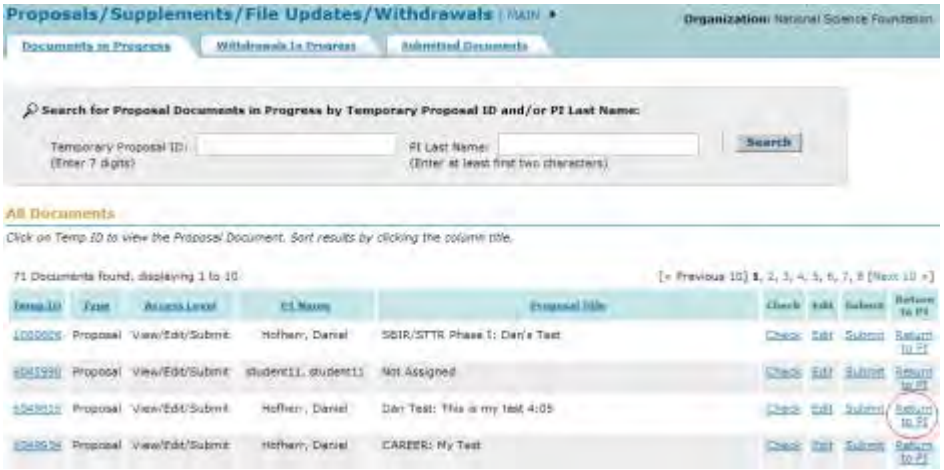

Figure 2 Proposals/Supplements/File Updates/Withdrawals screen on the Documents in Progress tab. The Return to PI link is circled.

3. Click **Return to PI** (Figure 2) on the row for the proposal you want to return. A screen displays (Figure 3) with a message for you to confirm this action.

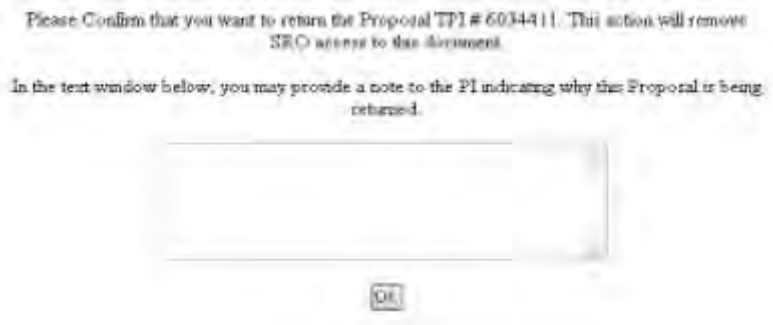

Figure 3 Screen with the message for you to confirm that you want to return the proposal to the PI.

4. Write a note to the PI in the text box (Figure 3) (optional). Once you return the proposal to the PI, you no longer have access to the proposal as an SPO.
5. Click the **OK** button (Figure 3). A screen displays (Figure 4) with the message that the proposal has been returned to the PI.

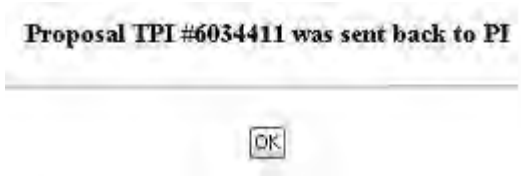

Figure 4 Screen with a message that the proposal has been returned to the PI.

6. Click the **OK** button (Figure 4). The **Proposals/Supplements/File Updates/Withdrawals** screen displays on the **Documents in Progress** tab (Figure 2).

AOR Functions

Access AOR Functions

1. *If you are an Authorized Organizational Representative (AOR) and need to sign a proposal that has been submitted to NSF,* on the **FastLane Home Page** screen, log in to Research Administration (see SPO AOR Login). The **Research Administration** screen displays (Figure 1).

Figure 1 Research Administration screen. The Authorized Organizational Representative Functions link is circled.

2. Click **Authorized Organizational Representative Functions** (Figure 1). The **Authorized Organizational Representative Functions** screen displays (Figure 2) with a listing of all the documents that require your electronic signature.

Figure 2 Authorized Organizational Representative Functions screen.

3. Verify that the Signature Information in the upper left of the screen is correct (Figure 3). If the information is not correct, click **Account Management** to change the information.

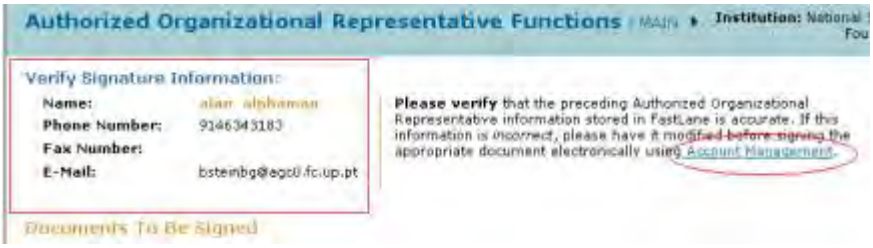

Figure 3 Verify Signature Information section of the Authorized Organizational Representative Functions screen. The Account Management link is circled.

You have these options on the **Authorized Organizational Representative Functions** screen:

- Sign a single proposal
- Sign several documents at once

Access AOR Functions

1. *If you are an Authorized Organizational Representative (AOR) and need to sign a proposal that has been submitted to NSF,* on the **FastLane Home Page** screen, log in to Research Administration (see SPO AOR Login). The **Research Administration** screen displays (Figure 1).

Figure 1 Research Administration screen. The Authorized Organizational Representative Functions link is circled.

2. Click **Authorized Organizational Representative Functions** (Figure 1). The **Authorized Organizational Representative Functions** screen displays (Figure 2) with a listing of all the documents that require your electronic signature.

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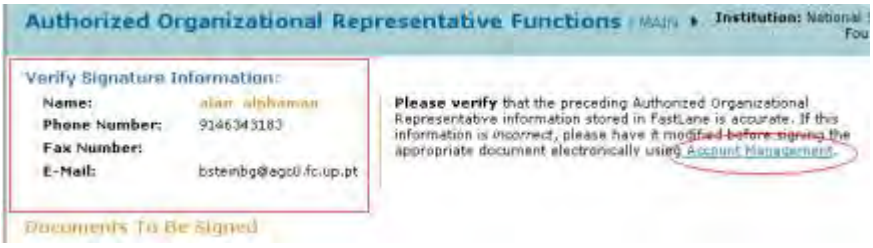


Figure 3 Verify Signature Information section of the Authorized Organizational Representative Functions screen. The Account Management link is circled.

You have these options on the **Authorized Organizational Representative Functions** screen:

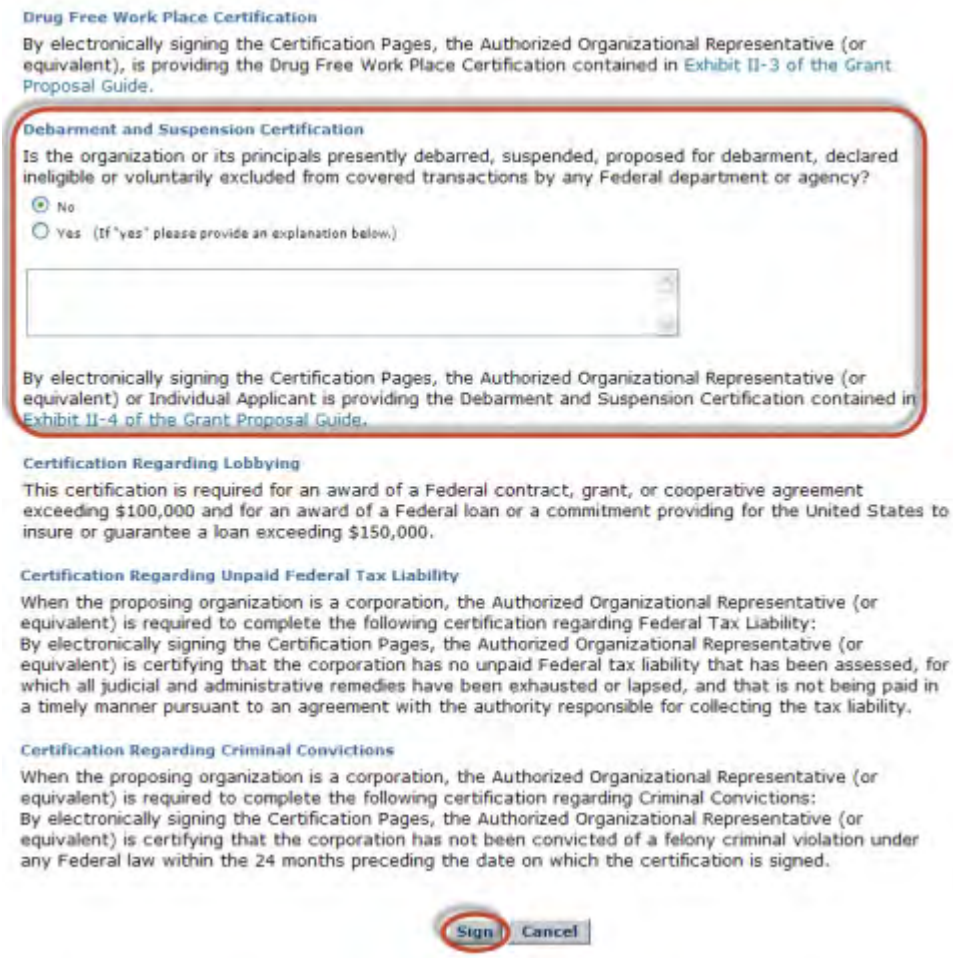
- Sign a single proposal
- Sign several documents at once

Sign a Single Proposal

1. Access the **Authorized Organizational Representative Functions** screen (Figure 1) (see Access AOR Functions).

Figure 1 Authorized Organizational Representative Functions screen. The check box for signing a proposal is circled.

2. Click the check box next to the proposal you want to electronically sign (Figure 1).
3. Click the **Sign** button (Figure 1). The **Electronic Signature Notice** screen displays (Figure 2).



Drug Free Work Place Certification

By electronically signing the Certification Pages, the Authorized Organizational Representative (or equivalent), is providing the Drug Free Work Place Certification contained in Exhibit II-3 of the Grant Proposal Guide.

Debarment and Suspension Certification

Is the organization or its principals presently debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from covered transactions by any Federal department or agency?

No

Yes (If "yes" please provide an explanation below.)

By electronically signing the Certification Pages, the Authorized Organizational Representative (or equivalent) or Individual Applicant is providing the Debarment and Suspension Certification contained in Exhibit II-4 of the Grant Proposal Guide.

Certification Regarding Lobbying

This certification is required for an award of a Federal contract, grant, or cooperative agreement exceeding $100,000 and for an award of a Federal loan or a commitment providing for the United States to insure or guarantee a loan exceeding $150,000.

Certification Regarding Unpaid Federal Tax Liability

When the proposing organization is a corporation, the Authorized Organizational Representative (or equivalent) is required to complete the following certification regarding Federal Tax Liability:
By electronically signing the Certification Pages, the Authorized Organizational Representative (or equivalent) is certifying that the corporation has no unpaid Federal tax liability that has been assessed, for which all judicial and administrative remedies have been exhausted or lapsed, and that is not being paid in a timely manner pursuant to an agreement with the authority responsible for collecting the tax liability.

Certification Regarding Criminal Convictions

When the proposing organization is a corporation, the Authorized Organizational Representative (or equivalent) is required to complete the following certification regarding Criminal Convictions:
By electronically signing the Certification Pages, the Authorized Organizational Representative (or equivalent) is certifying that the corporation has not been convicted of a felony criminal violation under any Federal law within the 24 months preceding the date on which the certification is signed.

Sign Cancel

Figure 2 Electronic Signature Notice screen. The Debarment and Suspension Certification section is boxed, and the Sign button is circled.

4. In the **Debarment and Suspension Certification** section of the **Electronic Signature Notice** screen (Figure 2), click the radio button for Yes or No to indicate if you are presently debarred, suspended, declared ineligible, or voluntarily excluded from covered transactions by any Federal department or agency.
5. If you answered **Yes**, type an explanation in the text box below the radio buttons (Figure 2).
6. Click the **Sign** button (Figure 2) to confirm your acceptance of the conditions. The **Confirmation** screen displays (Figure 3) with a message that the proposal has been signed.

CONFIRMATION
The Following Documents Have Been Signed:

Document Type	Proposal Award Number	Title
Proposal/Supplement	0455558	PWL Testing Post Doc

Return to ADR Functions Main

Figure 3 Confirmation screen with a message that the proposal has been signed.

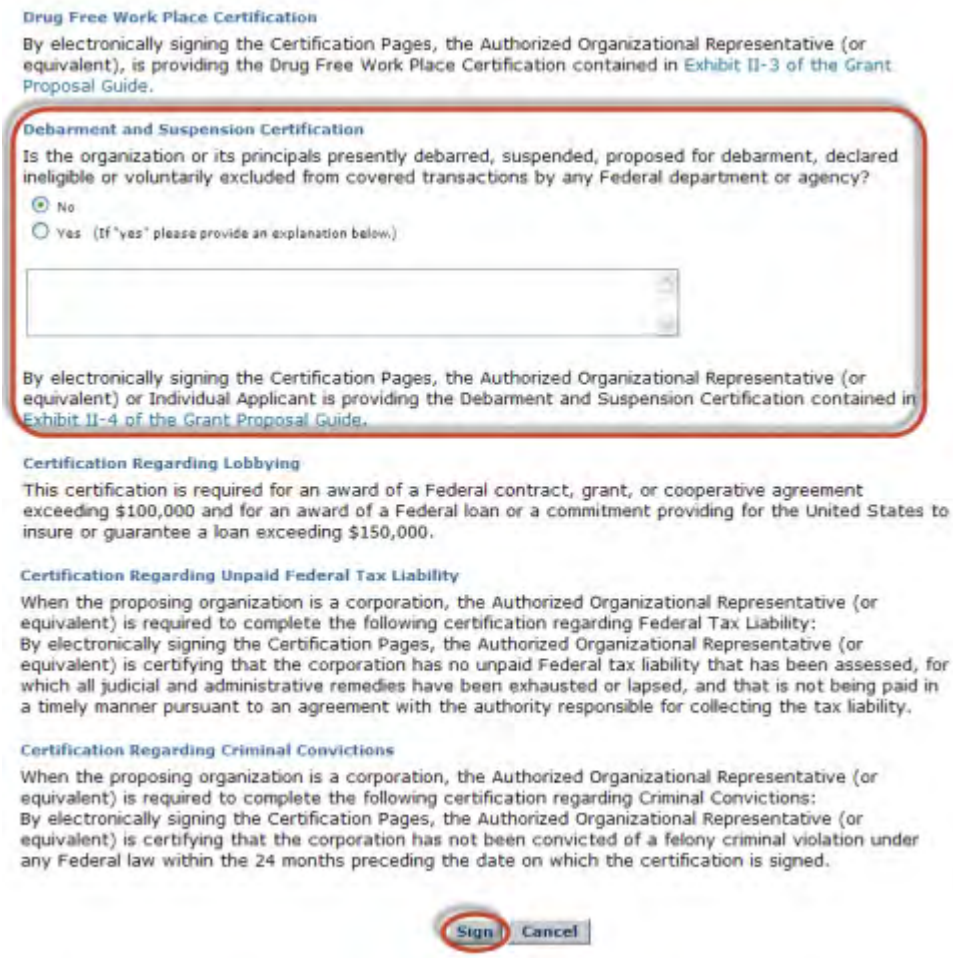
7. Click **Return to AOR Functions Main** (Figure 3). The **Authorized Organizational Representative Functions** screen displays (Figure 1).

Sign Several Documents at Once

1. Access the **Authorized Organizational Representative Functions** screen (Figure 1) (see Access AOR Functions).

Figure 1 Authorized Organizational Representative Functions screen. The Sign button is circled.

2. Select the documents you want to sign by any one of the following options (Figure 1):
   - Click the box next to **Check to Select All Proposals/Supplements** to sign only the proposals and supplements listed.
   - Click the box next to **Check to Select All Documents** to sign all documents listed.
   - Click the check mark box next to each document that you want to sign.
3. Click the **Sign** button (Figure 1). The **Electronic Signature Notice** screen displays (Figure 2).



Drug Free Work Place Certification

By electronically signing the Certification Pages, the Authorized Organizational Representative (or equivalent), is providing the Drug Free Work Place Certification contained in Exhibit II-3 of the Grant Proposal Guide.

Debarment and Suspension Certification

Is the organization or its principals presently debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from covered transactions by any Federal department or agency?

No

Yes (If "yes" please provide an explanation below.)

By electronically signing the Certification Pages, the Authorized Organizational Representative (or equivalent) or Individual Applicant is providing the Debarment and Suspension Certification contained in Exhibit II-4 of the Grant Proposal Guide.

Certification Regarding Lobbying

This certification is required for an award of a Federal contract, grant, or cooperative agreement exceeding $100,000 and for an award of a Federal loan or a commitment providing for the United States to insure or guarantee a loan exceeding $150,000.

Certification Regarding Unpaid Federal Tax Liability

When the proposing organization is a corporation, the Authorized Organizational Representative (or equivalent) is required to complete the following certification regarding Federal Tax Liability:
By electronically signing the Certification Pages, the Authorized Organizational Representative (or equivalent) is certifying that the corporation has no unpaid Federal tax liability that has been assessed, for which all judicial and administrative remedies have been exhausted or lapsed, and that is not being paid in a timely manner pursuant to an agreement with the authority responsible for collecting the tax liability.

Certification Regarding Criminal Convictions

When the proposing organization is a corporation, the Authorized Organizational Representative (or equivalent) is required to complete the following certification regarding Criminal Convictions:
By electronically signing the Certification Pages, the Authorized Organizational Representative (or equivalent) is certifying that the corporation has not been convicted of a felony criminal violation under any Federal law within the 24 months preceding the date on which the certification is signed.

Sign Cancel

Figure 2 Electronic Signature Notice screen. The Sign button is circled.

4. In the **Debarment and Suspension Certification** section of the **Electronic Signature Notice** screen (Figure 2), click the radio button for Yes or No to indicate if you are presently debarred, suspended, declared ineligible, or voluntarily excluded from covered transactions by any Federal department or agency.
5. If you answered **Yes**, type an explanation in the text box below the radio buttons (Figure 2).
6. Click the **Sign** button (Figure 2) to confirm your acceptance of the conditions. The **Confirmation** screen displays (Figure 3) with a message that the proposals have been signed.

CONFIRMATION
The Following Documents Have Been Signed:

Document Type	Proposal Award Number	Title
Proposal/Supplement	0413936	Modulation of Transmitter Release
Proposal/Supplement	0414039	Mathematical models for bacterial propulsion and pattern for
Proposal/Supplement	0414470	Multimodal (speech plus handwriting) Communication of Mathem
Proposal/Supplement	0414495	THE FUTURES OF OUR PASTS: Three-Dimensional Representations
Proposal/Supplement	0414496	Laser Interactions with Combustion Generated Nano-Particles
Proposal/Supplement	0415027	Information and Data Management in the Emerging Field of Gra
Proposal/Supplement	0415210	Video Similarity Search in Very Large Databases
Proposal/Supplement	0415258	Photosynthetic hydrogen metabolism in unicellular green alga
Proposal/Supplement	0415293	Ion Hydration and New Structural Methods in Mass Spectrometr
Proposal/Supplement	0415295	Cluster-Expanded Solids: A Strategy for Assembling Functiona

Figure 3 Confirmation screen with a message that the proposals have been signed.

Update a Submitted Proposal

Update a Submitted Proposal Introduction

It is the responsibility of the proposing organization to thoroughly review each proposal before the proposal's submission. On occasion, however, a problem is identified with a portion of the proposal after the proposal has been submitted electronically to NSF.

The FastLane Proposal File Update Module allows the organization to request the replacement of files or revision of other Proposal Attributes, associated with a previously submitted proposal. Further information on this process can be found in the PAPPG

Roles in Proposal File Update

As a PI, you can:

- Create a Proposal File Update
- View and edit an update
- View the Update Summary
- Create an update PIN
- Allow SPO access to an update
- Remove SPO access to an update
- Delete an update

As an SPO, you can:

- View the Update Summary
- Check an update for completeness
- Edit an update
- Return an update to the PI

As an AOR you can do all of the above and

- Sign and Submit an update
- Withdraw an update

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- View the Update Summary
- Check an update for completeness
- Edit an update
- Return an update to the PI

As an AOR you can do all of the above and
- Sign and Submit an update
- Withdraw an update

PI Functions

Update a Proposal as a PI

Print the contents of the PI Functions for Update a Submitted Proposal.

As a PI, you can:
- Create a Proposal File Update
- View and edit an update
- View an Update Summary
- Create an update PIN
- Allow SPO access to an update
- Delete an update
- Work with forwarded updates, including remove SPO access to an update
- View and print an updated proposal
- View and print a submitted update

Update a Proposal as a PI

Print the contents of the PI Functions for Update a Submitted Proposal.

As a PI, you can:

- Create a Proposal File Update
- View and edit an update
- View an Update Summary
- Create an update PIN
- Allow SPO access to an update
- Delete an update
- Work with forwarded updates, including remove SPO access to an update
- View and print an updated proposal
- View and print a submitted update

Create a Proposal File Update

1. On the **FastLane Home Page** screen, log in to Proposals, Awards, and Status (see PI/Co-PI Login). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management** screen displays (Figure 1).

Figure 1 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management screen. The Proposal Functions link is circled.

2. Click **Proposal Functions** (Figure 1). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Proposal Functions** screen displays (Figure 2).

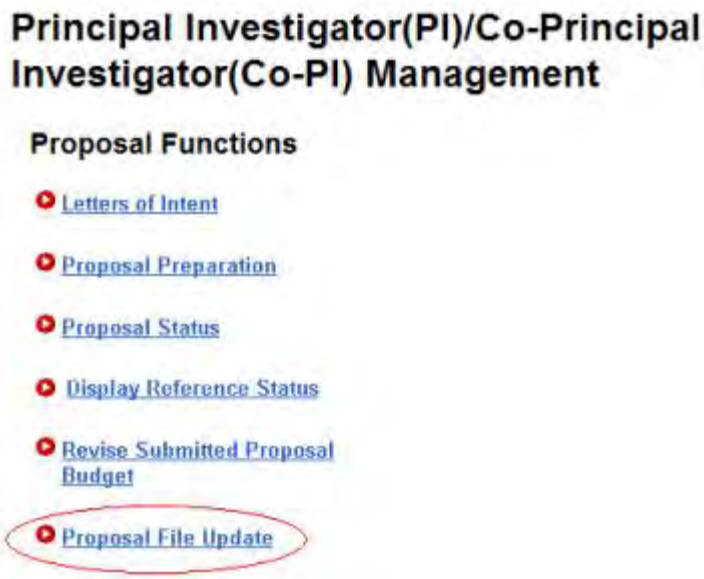


Figure 2 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Proposal Functions screen. The Proposal File Update link is circled.

3. Click **Proposal File Update** (Figure 2). The **List of Proposals Eligible for Update** screen displays (Figure 3).

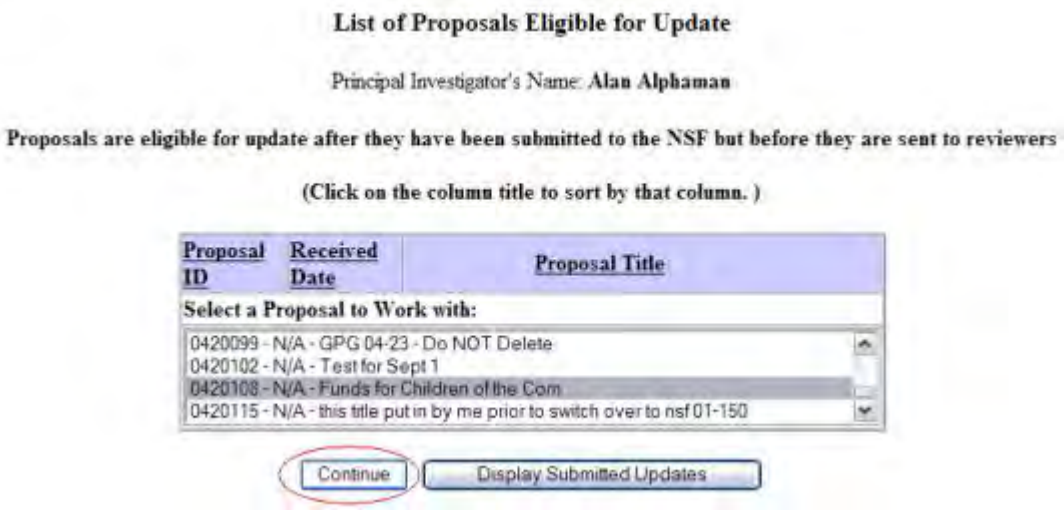


Figure 3 List of Proposals Eligible for Update screen. The Continue button is circled.

4. Highlight the proposal you want to work on in the **List of Proposals Eligible for Update** (Figure 3).
5. Click the **Continue** button (Figure 3). The **Proposal Update Control** screen for that proposal displays (Figure 4).

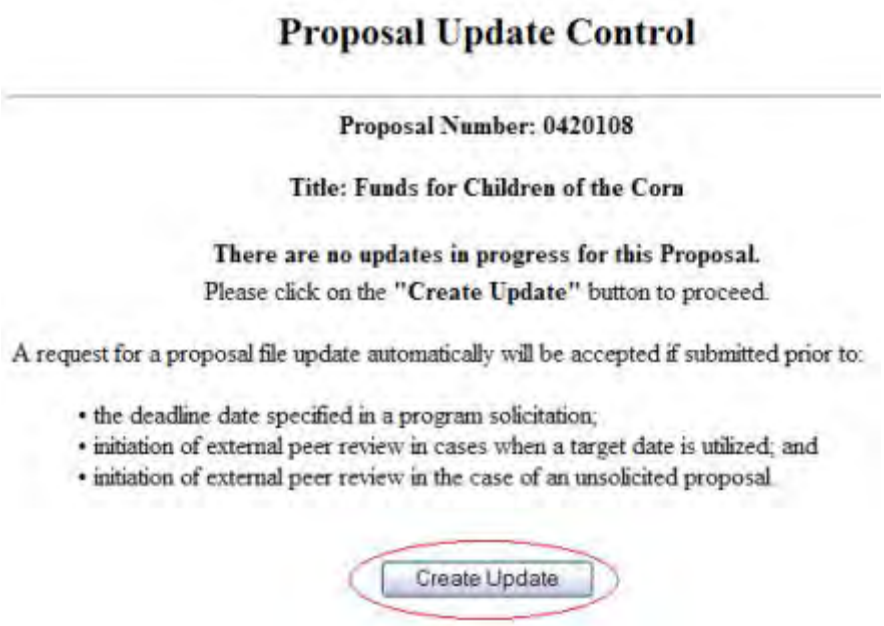


Figure 4 Proposal Update Control screen for the selected proposal. The Create Update button is circled.

6. Click the **Create Update** button (Figure 4). The **Proposal Update Control** screen for the proposal displays (Figure 5).

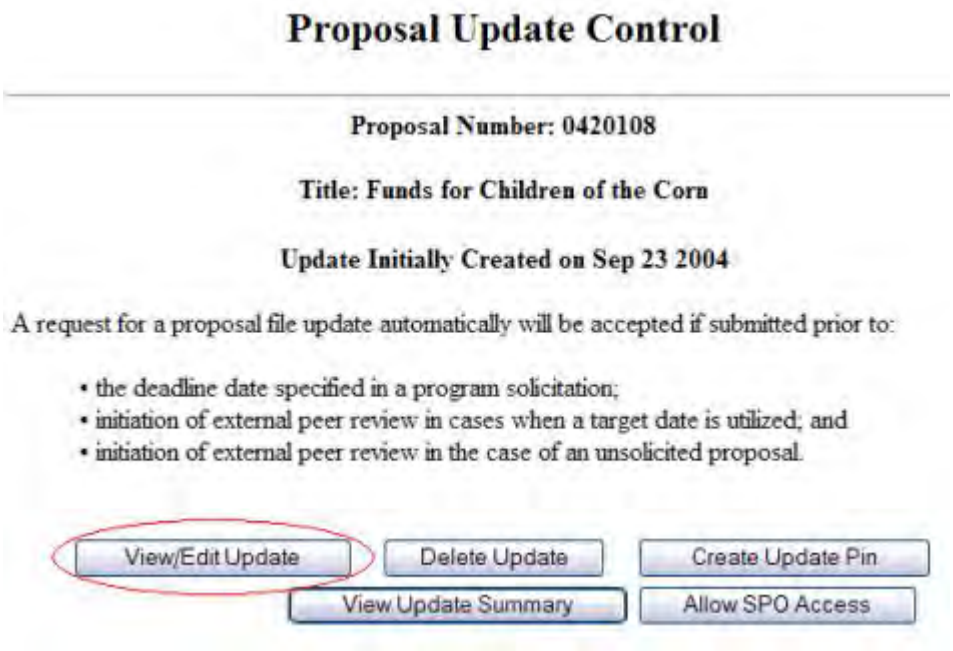


Figure 5 Proposal Update Control screen. The View / Edit Update button is circled.

7. Click the **View / Edit Update** button (Figure 5). The **Proposal Update Form Preparation** screen displays (Figure 6). This screen lists all the sections of the proposal; you can update any section except the Postdoctoral Mentoring Plan. .

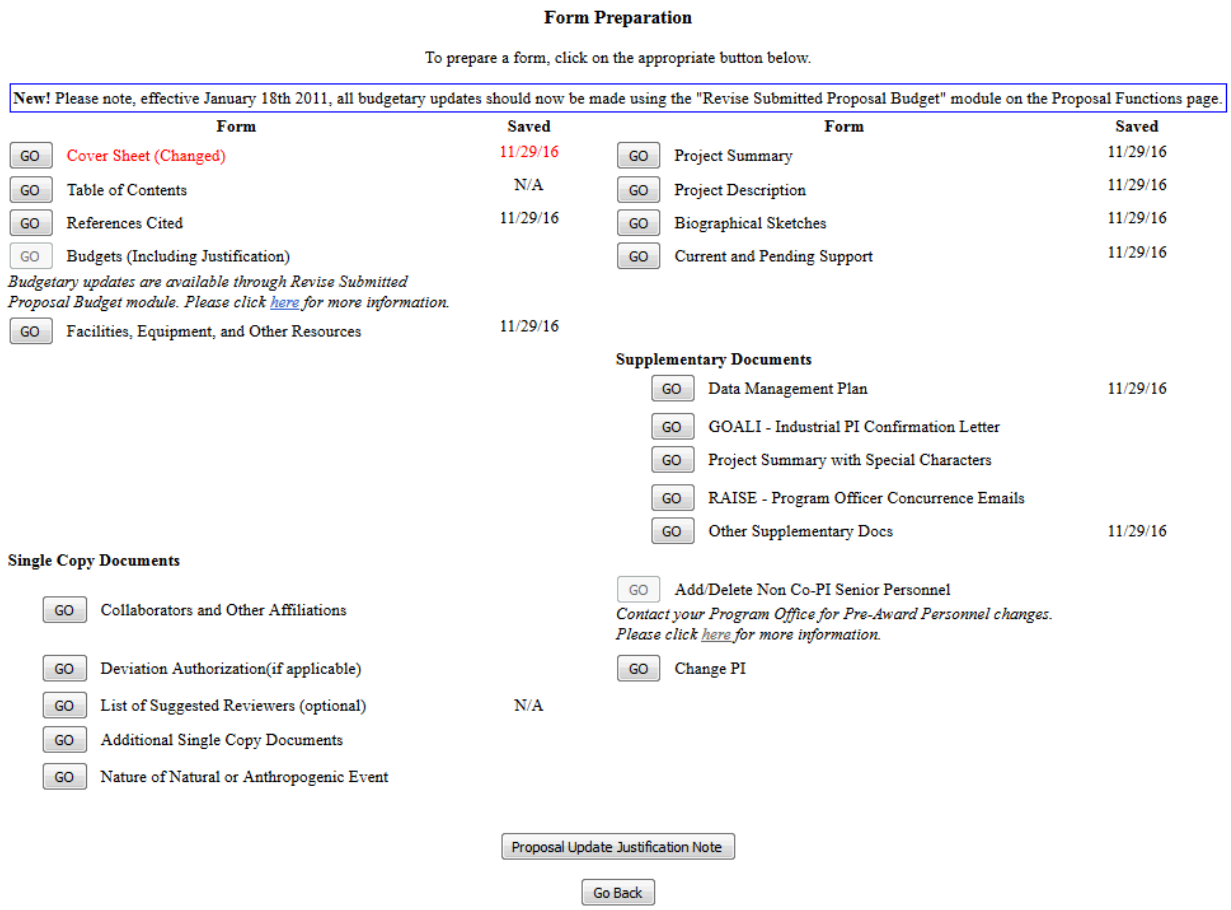


Figure 6 Proposal Update Form Preparation screen. The Go button for Project Summary is circled.

8. Click the **Go** button for the section that you want to update (Figure 6). See Prepare Proposal Forms for the instructions for any section.
9. Type or copy and paste text in the text box for the section. Or, for a Project Summary with Special Characters, upload a new file to replace the old file in the Supplementary Documents section. See Acceptable Formats for FastLane and Upload a File for instructions. After you have accepted the uploaded section or saved the text in the text box, the **Proposal Update Form Preparation** screen displays (Figure 7). The updated section (the Project Summary in Figure 7 as an example) now displays in red and is marked as Changed with the date of the change.

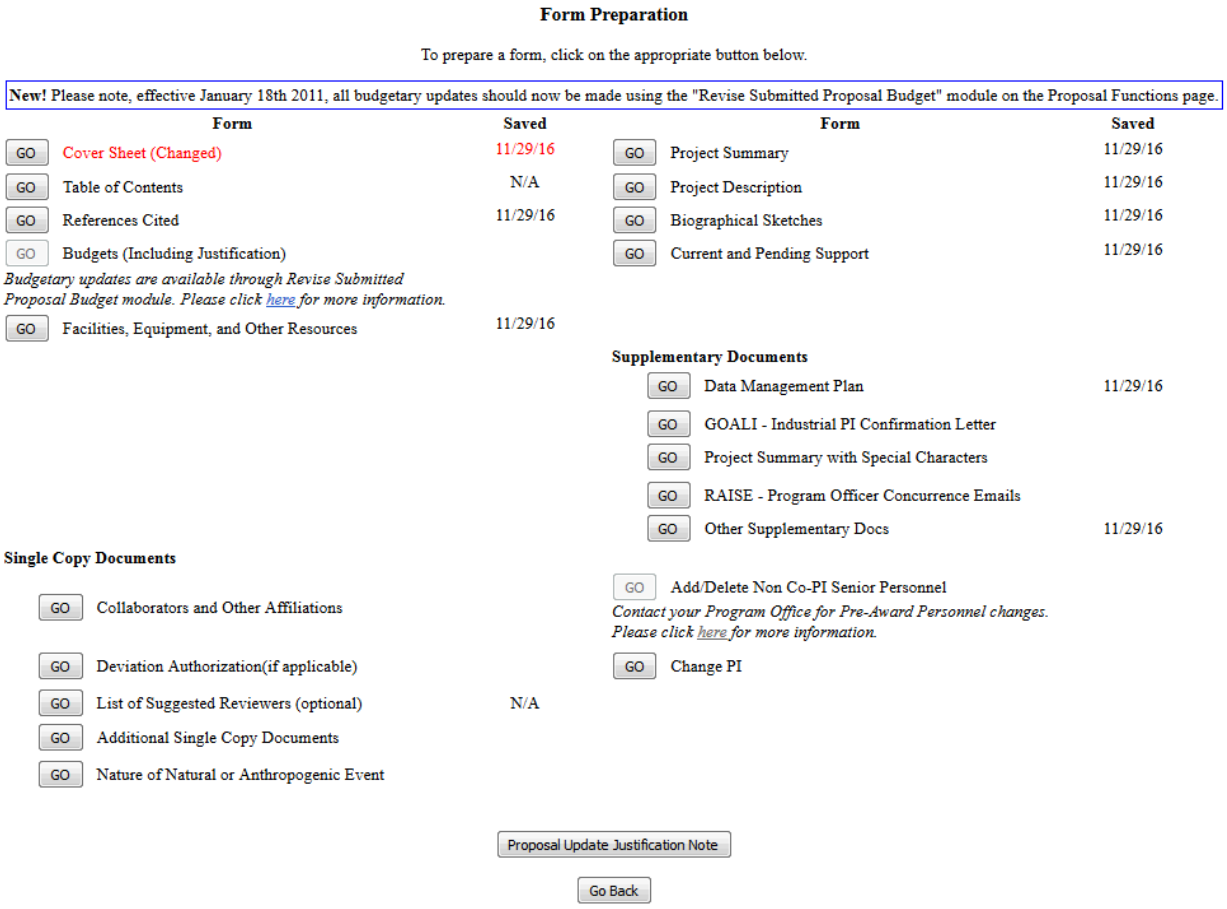


Figure 7 Proposal Update Form Preparation screen. The updated section (circled) is in red and marked as Changed with the date of the change. The Proposal Update Justification Note button is circled.

10. Repeat Step 9 for any sections you want to replace.
11. Click the **Proposal Update Justification Note** button (Figure 7). The **Justification Note** screen displays (Figure 8) with a text box for entering the justification for the Proposal File Update.

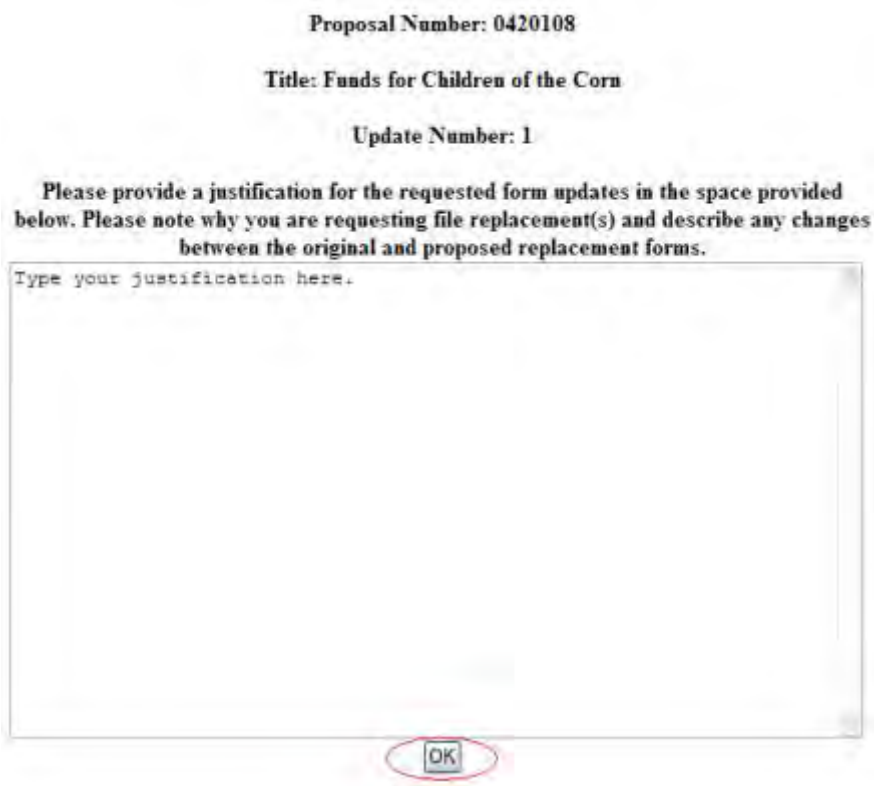


Figure 8 Justification Note screen. The OK button is circled.

12. Type or copy and paste the Justification in the text box (Figure 8).
13. Click the **OK** button (Figure 8). A screen displays (Figure 9) with the message that the Justification Note has been saved.

Figure 9 Screen with the message that the Justification Note has been saved.

14. Click the **OK** button (Figure 9). The **Proposal Update Form Preparation** screen displays (Figure 7).

View and Edit a Proposal File Update

If a Proposal File Update has already been created, you may view and also edit it.

1. On the **FastLane Home Page** screen, log in as a PI or Co-PI to Proposals, Awards, and Status (see PI/Co-PI Login). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management** screen displays (Figure 1).

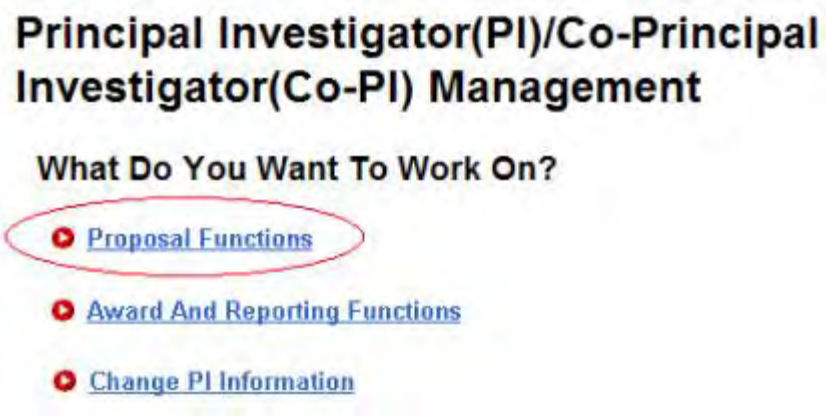


Figure 1 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management screen. The Proposal Functions link is circled.

2. Click **Proposal Functions** (Figure 1). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Proposal Functions** screen displays (Figure 2).

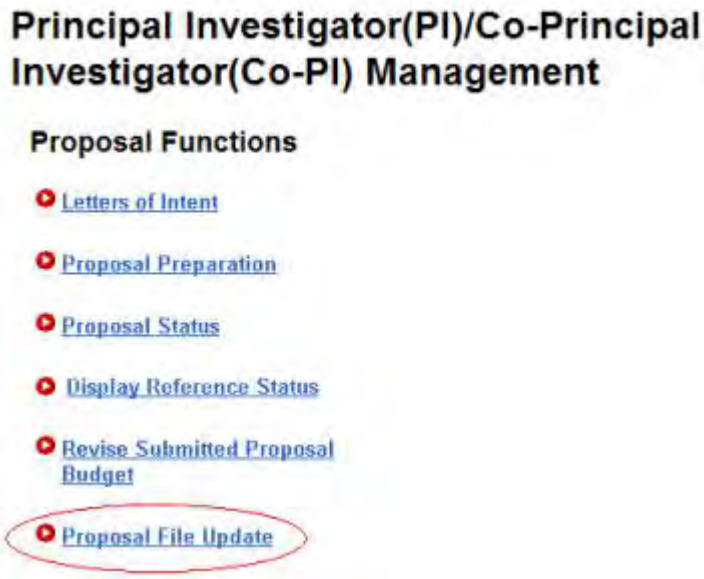


Figure 2 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Proposal Functions screen. The Proposal File Update link is circled.

3. Click the **Proposal File Update** link (Figure 2). The **List of Proposals Eligible for Update** screen displays (Figure 3).

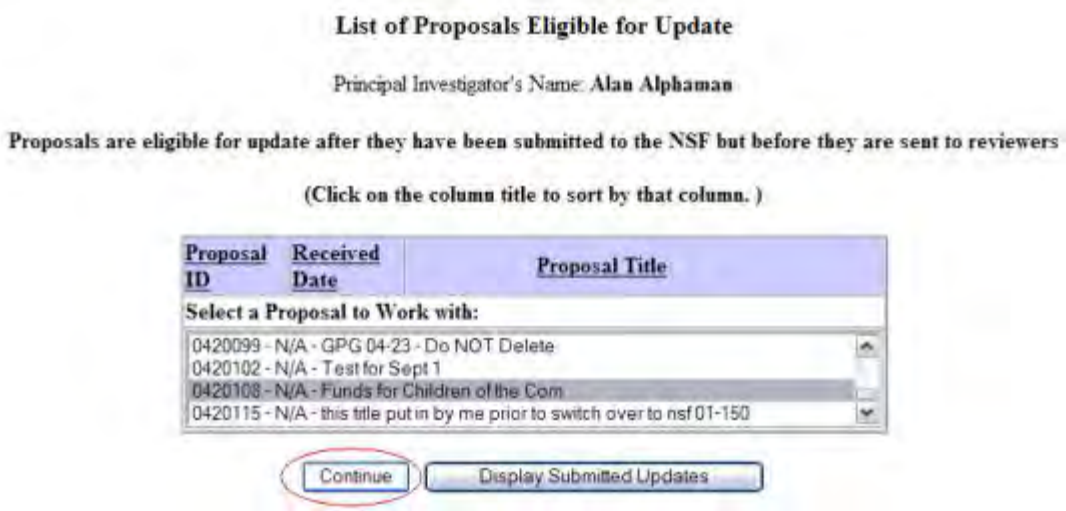


Figure 3 List of Proposals Eligible for Update screen. The Continue button is circled.

4. Highlight the proposal you want to work on in the **List of Proposals Eligible for Update** (Figure 3).
5. Click the **Continue** button (Figure 3). The **Proposal Update Control** screen for that proposal displays (Figure 4).

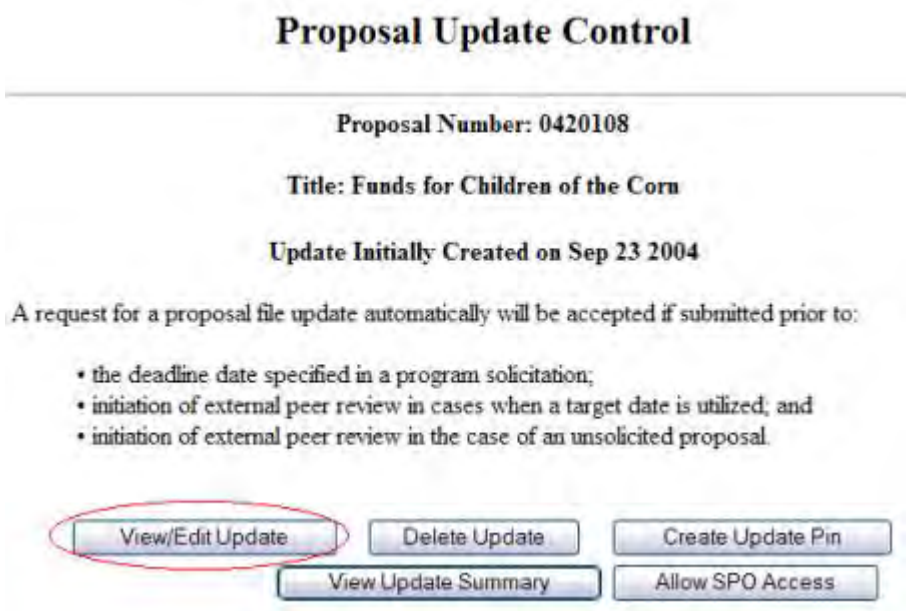


Figure 4 Proposal Update Control screen. The View / Edit Update button is circled.

6. Click the **View / Edit Update** button (Figure 4). The **Proposal Update Form Preparation** screen displays (Figure 5) with these options:
   - View a section of an updated proposal
   - Update a section or edit an updated section

- View and edit the Justification Note

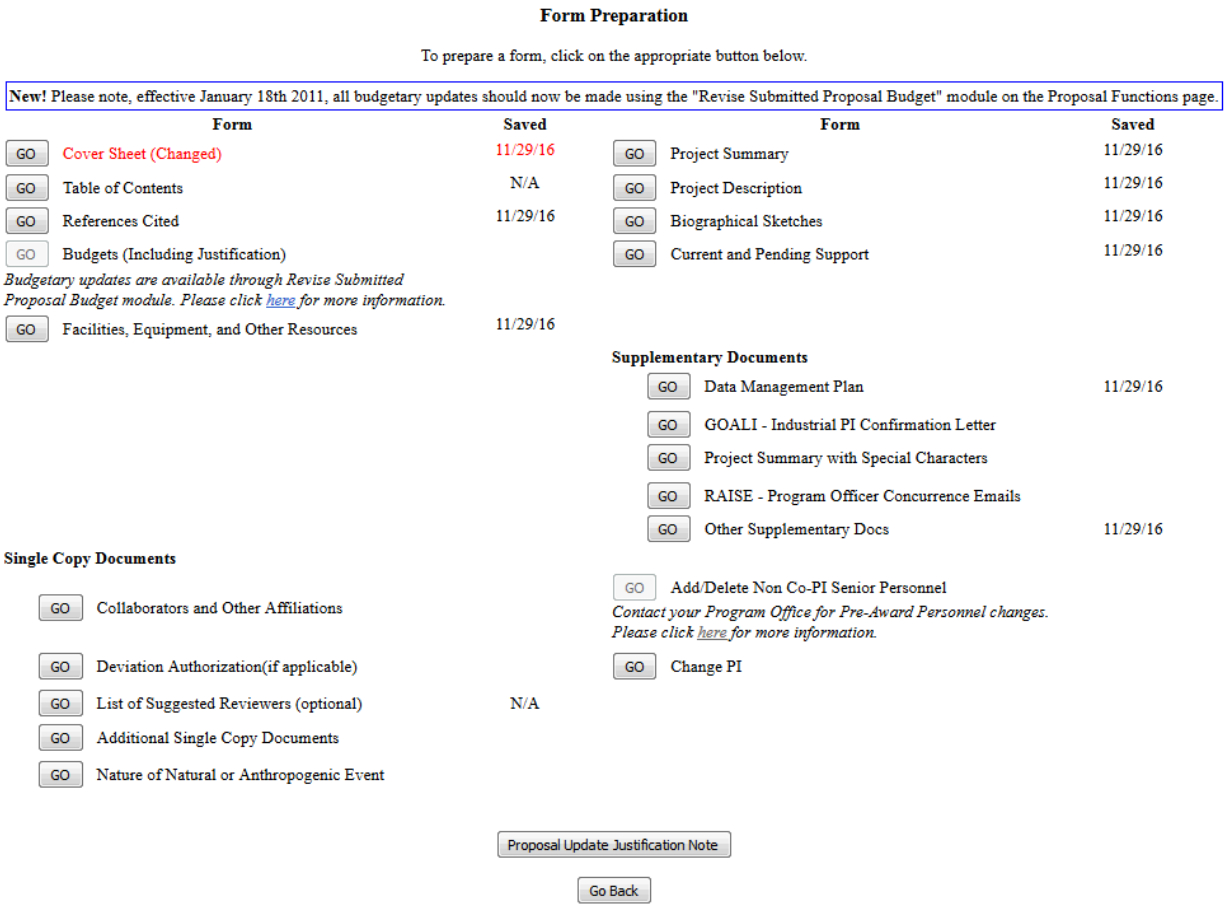


Figure 5 Proposal Update Form Preparation screen. The Go button for the updated section and the Proposal Update Justification Note button are circled.

View a Section of an Updated Proposal

1. On the **Proposal Update Form Preparation** screen (Figure 5), click the **Go** button for the updated section that you want to view. The **File Upload** screen displays for that section, for example, the Project Summary, as in Figure 6.

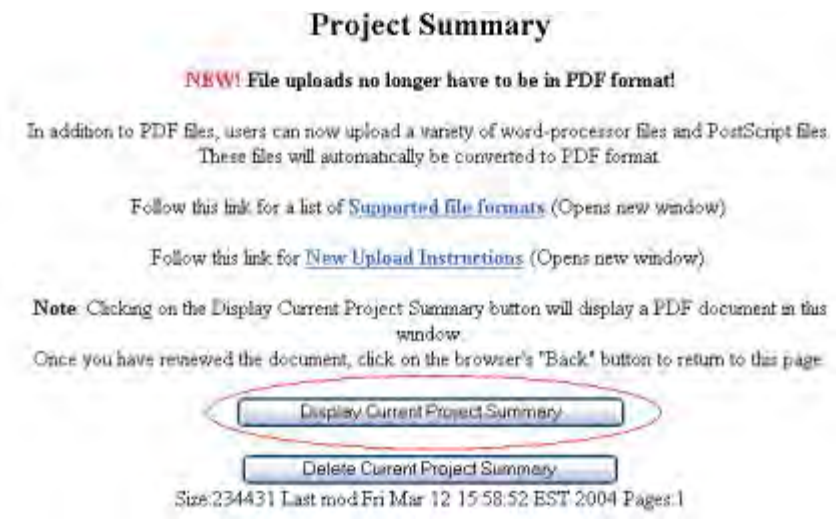


Figure 6 Project Summary File Upload screen. The Display Current Project Summary button is circled.

2. Click the **Display Current** section button for that section, as in Figure 6 for the Project Summary. The updated file displays in PDF format. If you need to download Adobe Reader, see Adobe Reader for FastLane.
3. Click the browser back button to return to the **Proposal Update Form Preparation** screen (Figure 5).

Update a Section or Edit the Updated Section

1. On the **Proposal Update Form Preparation** screen (Figure 5), click the **Go** button for the section you want to edit (see Prepare Proposal Forms for instructions for any proposal section). The text box screen or the **File Upload** screen for that section displays.
2. Type or copy and paste text in the text box or upload a new file to replace the old file. See Acceptable Formats for FastLane and Upload a File for instructions. After you have accepted the upload or saved the text in the text box, the **Proposal Update Form Preparation** screen displays (Figure 5).

View and Edit the Justification Note

1. On the **Proposal Update Form Preparation** screen (Figure 5), click the **Proposal Update Justification Note** button. The **Justification Note** screen displays (Figure 7).

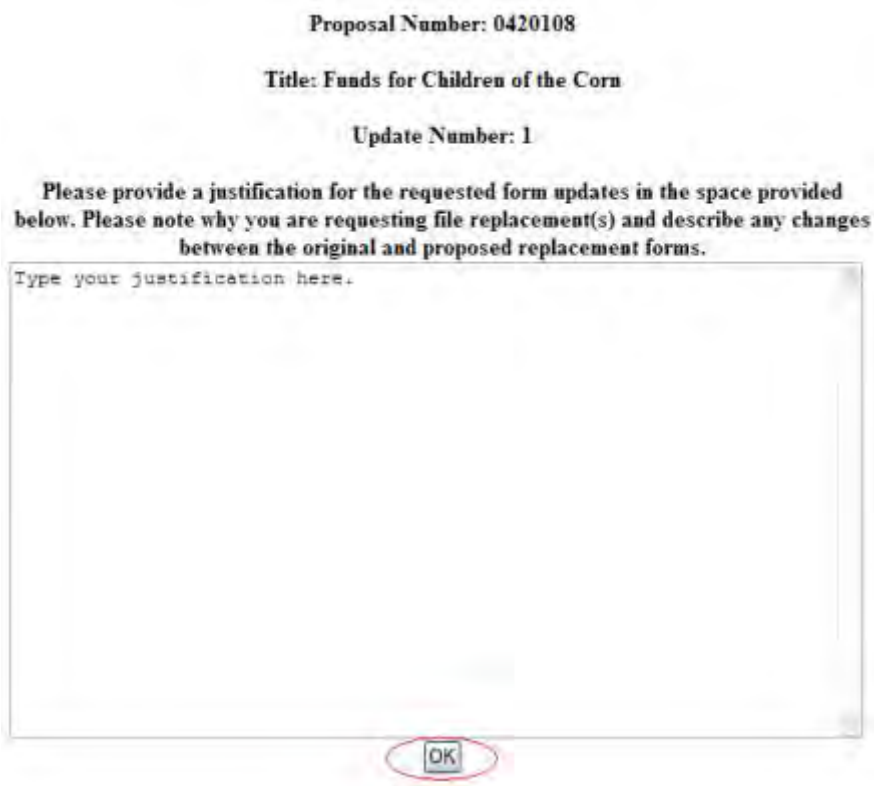


Figure 7 Justification Note screen. The OK button is circled.

2. View and edit the Justification as you require (Figure 7).
3. Click the **OK** button (Figure 7). A screen displays (Figure 8) with the message that FastLane has saved the Justification Note.

Figure 8 Screen with the message that the Justification Note has been saved.

4. Click the **OK** button (Figure 8). The **Proposal Update Form Preparation** screen displays (Figure 5).

View the Update Summary

1. Access the **Proposal Update Control** screen (Figure 1) (see View and Edit a Proposal File Update, Step 1 through Step 5).

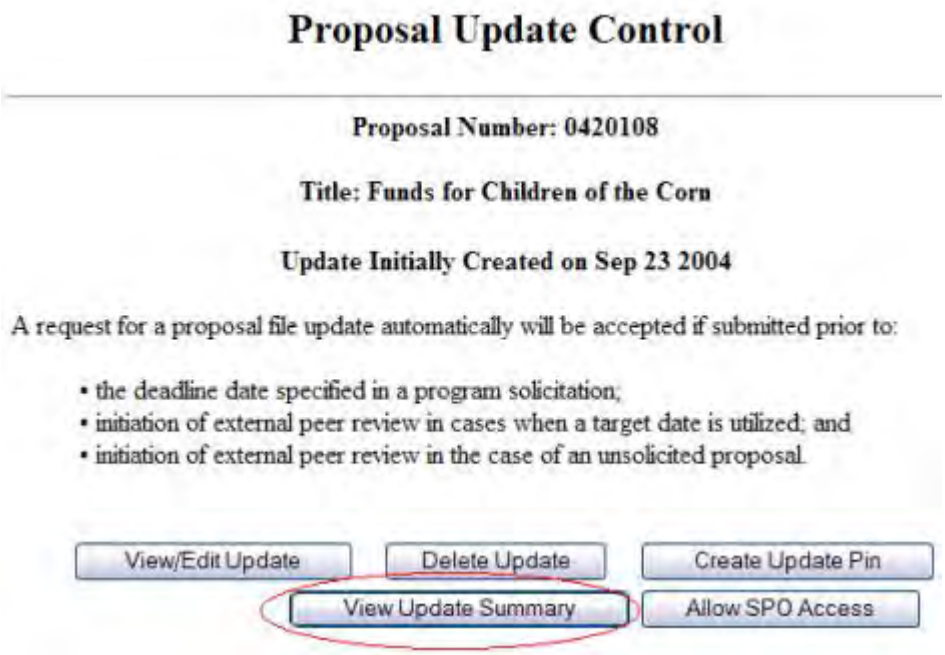


Figure 1 Proposal Update Control screen. The View Update Summary button is circled.

2. Click the **View Update Summary** button (Figure 1). The **Proposal Update Summary** screen displays (Figure 2) with the status of the update and a listing of the updated sections. You have these options:
   - View the current section, the section as it was submitted to NSF
   - View the proposed replacement section, the section as it has been updated
   - View the Justification Note for the update

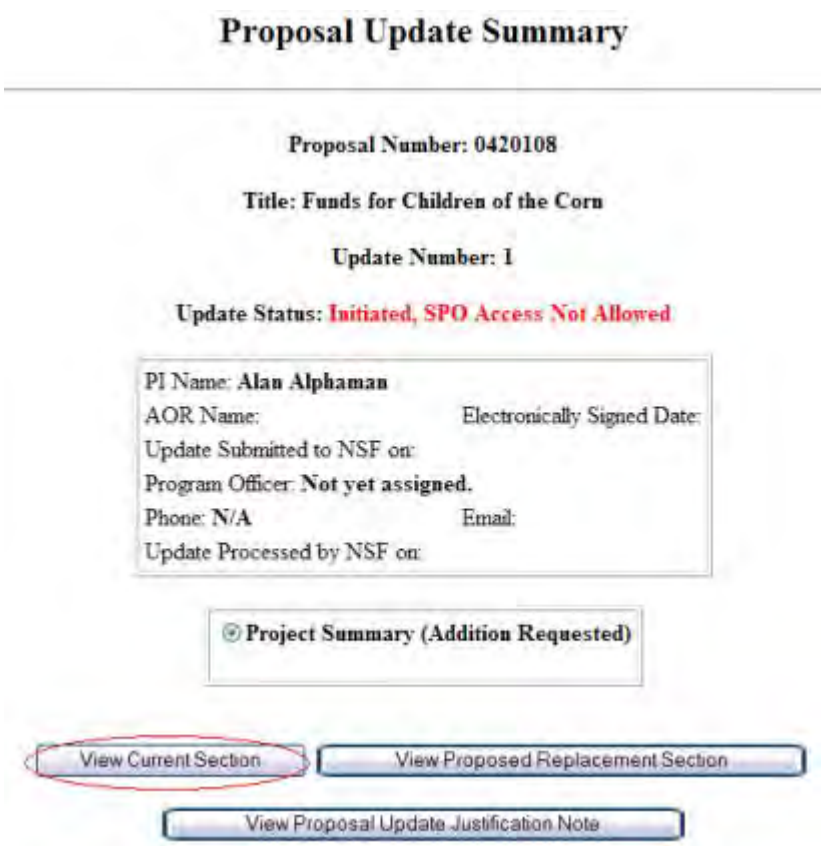


Figure 2 Proposal Update Summary screen. The View Current Section button is circled.

View the Current Section

1. On the **Proposal Update Summary** screen (Figure 2), in the box listing the updated sections, click the radio button for the current section you want to view.
2. Click the **View Current Section** button (Figure 2). The section displays in PDF format. If you need to download Adobe Reader, see Adobe Reader for FastLane.
3. Click the back button on the browser to return to the **Proposal Update Summary** screen (Figure 2).

View the Proposed Replacement Section

1. On the **Proposal Update Summary** screen (Figure 3), in the box listing the updated sections, click the radio button for the updated section that you want to view.

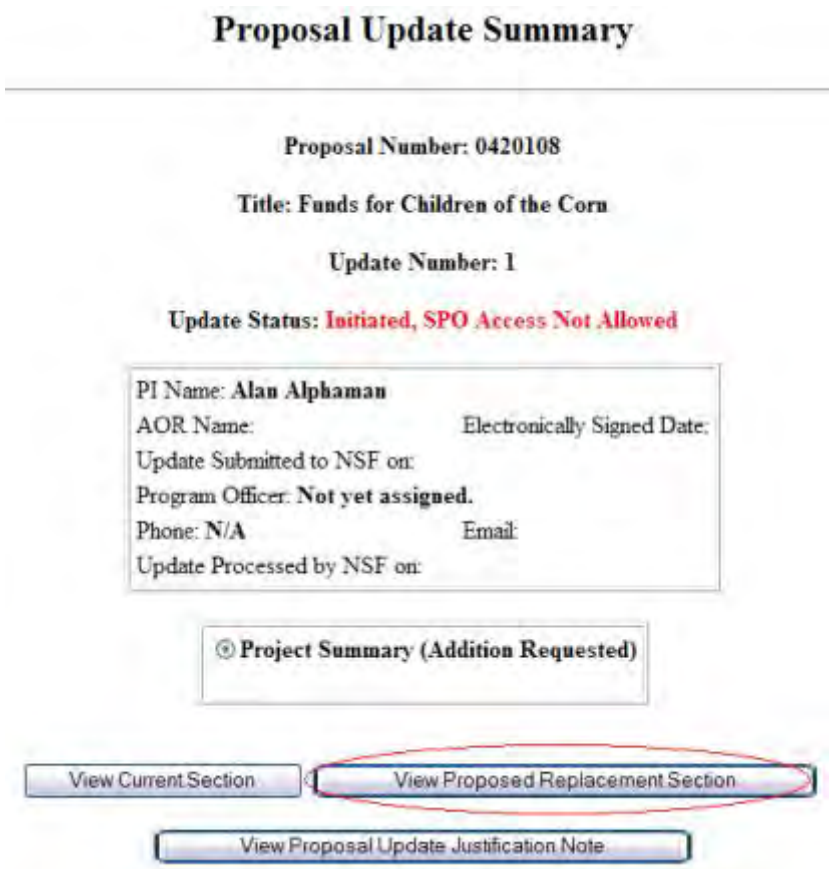


Figure 3 Proposal Update Summary screen. The View Proposed Replacement Section button is circled.

2. Click the **View Proposed Replacement Section** button (Figure 3). The form displays in PDF format. If you need to download Adobe Reader, see Adobe Reader for FastLane.
3. Click the back button on the browser to return to the **Proposal Update Summary** screen (Figure 3).

View the Justification Note

1. On the **Proposal Update Summary** screen (Figure 4), click the **View Proposal Update Justification Note** button. The **Justification Note** screen displays (Figure 5).

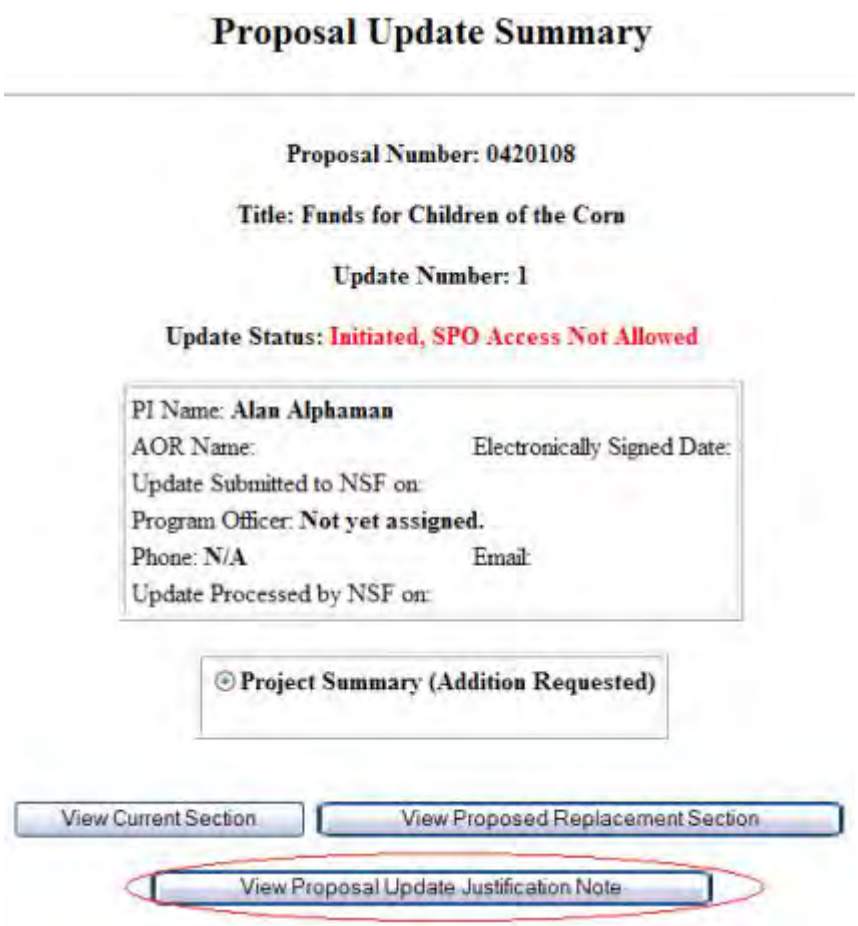


Figure 4 Proposal Update Summary screen. The View Proposal Update Justification Note button is circled.

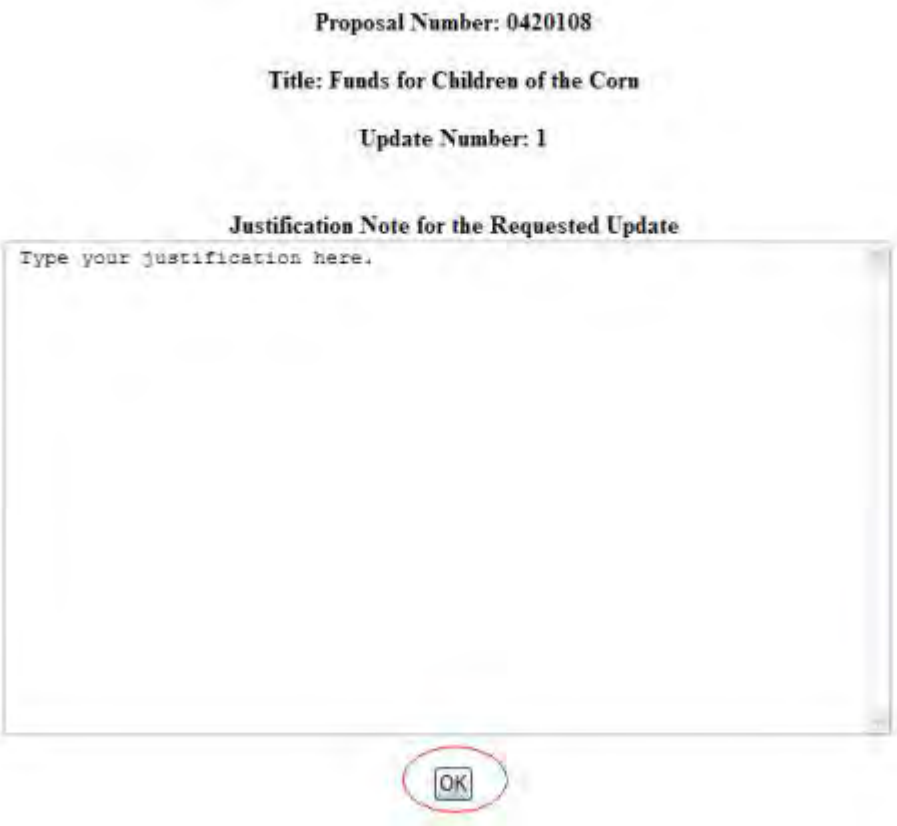


Figure 5 Justification Note screen. The OK button is circled.

2. Click the **OK** button (Figure 5). The **Proposal Update Summary** screen displays (Figure 4).

Create an Update PIN

1. Access the **Proposal Update Control** screen (Figure 1) (see View and Edit a Proposal File Update, Step 1 through Step 5).

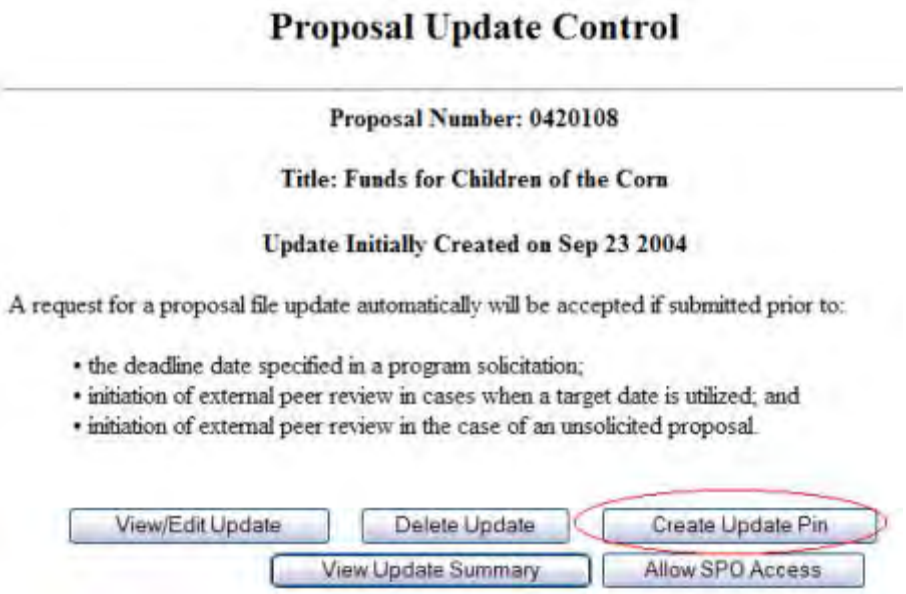


Figure 1 Proposal Update Control screen. The Create Update PIN button is circled.

2. Click the **Create Update PIN** button (Figure 1). The **Proposal File Update PIN Control** screen displays (Figure 2).

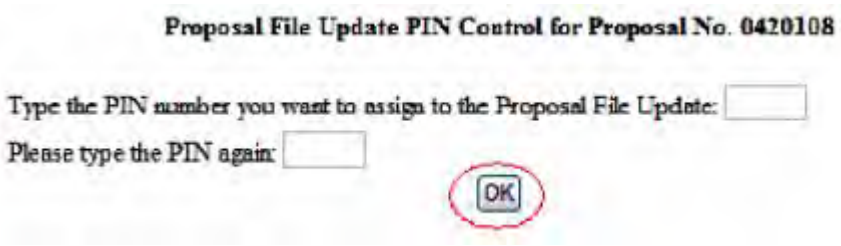


Figure 2 Proposal File Update PIN Control screen. The OK button is circled.

3. Type the PIN number in the boxes (Figure 2).
4. Click the **OK** button (Figure 2). A screen displays (Figure 3) with the message that the PIN number has been changed.
5. Click the **OK** button (Figure 3). The **Proposal Update Control** screen displays (Figure 1).

Delete a Proposal File Update

1. Access the **Proposal Update Control** screen (Figure 1) (see View and Edit a Proposal File Update, Step 1 through Step 5).

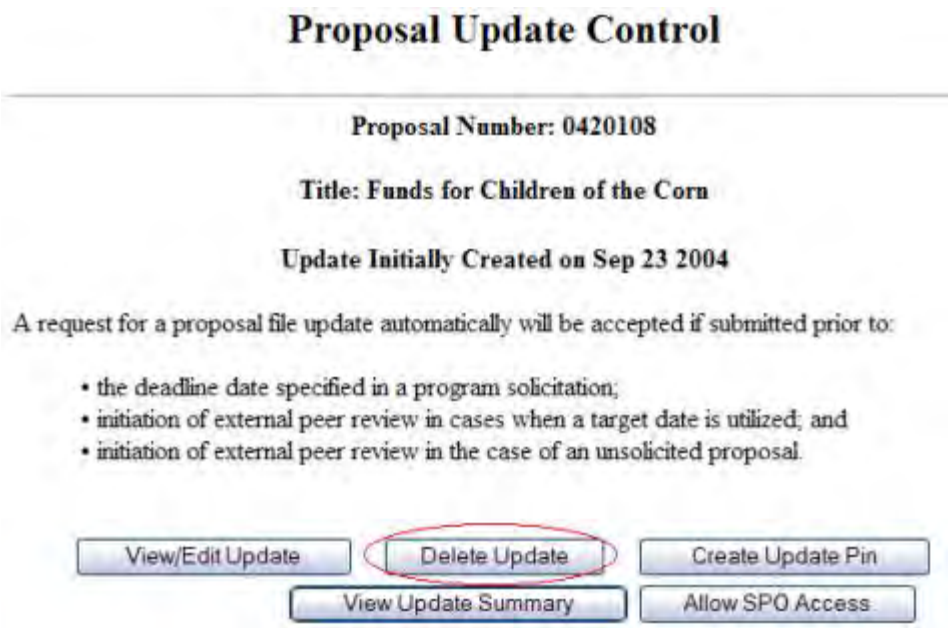


Figure 1 Proposal Update Control screen. The Delete Update button is circled.

2. Click the **Delete Update** button (Figure 1). A screen displays (Figure 2) with a message for you to confirm that you want to delete that Proposal File Update and a warning that the update cannot be restored.

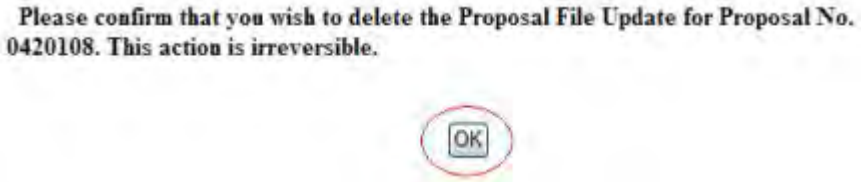


Figure 2 Screen with a message for you to confirm that you want to delete the Proposal File Update. The OK button is circled.

3. Click the **OK** button (Figure 2). A screen displays (Figure 3) with the message that the update is deleted.

Figure 3 Screen with the message that the update has been deleted.

4. Click the **OK** button (Figure 3). The **Proposal Update Control** screen displays (Figure 1).

Allow SPO Access to a Proposal File Update

1. Access the **Proposal Update Control** screen (Figure 1) (see View and Edit a Proposal File Update, Step 1 through Step 5).

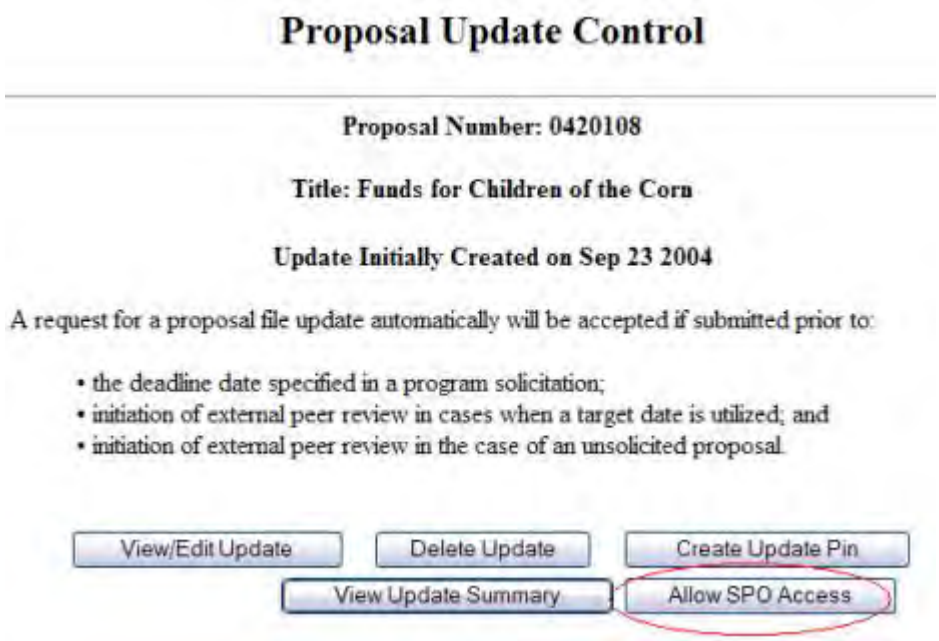


Figure 1 Proposal Update Control screen. The Allow SPO Access button is circled.

2. Click the **Allow SPO Access** button (Figure 1). A screen displays (Figure 2) with a message for you to confirm that you want to allow SPO access to the Proposal File Update.

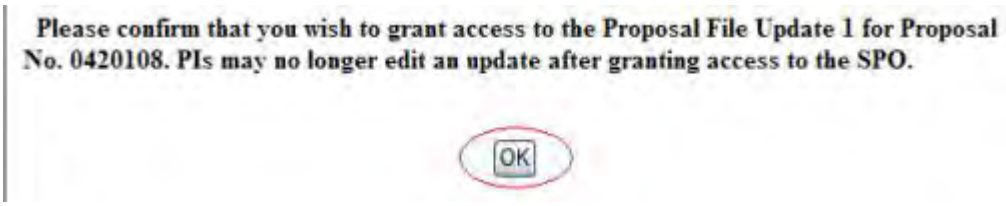


Figure 2 Screen with message for you to confirm that you want to grant the SPO access to the update. The OK button is circled.

3. Click the **OK** button (Figure 2). The **Access to Proposal File Update Has Been Given to Your SPO** screen displays (Figure 3) with the message that the SPO has access to the Proposal File Update. The screen also lists the names of people to whom FastLane has sent emails to notify them of the SPO's access.

Figure 3 Access to Proposal File Update Has Been Given to Your SPO screen.

4. Click the **OK** button (Figure 3). The **Proposal Update Control** screen displays (Figure 4) with the update now listed as a Forwarded Update.

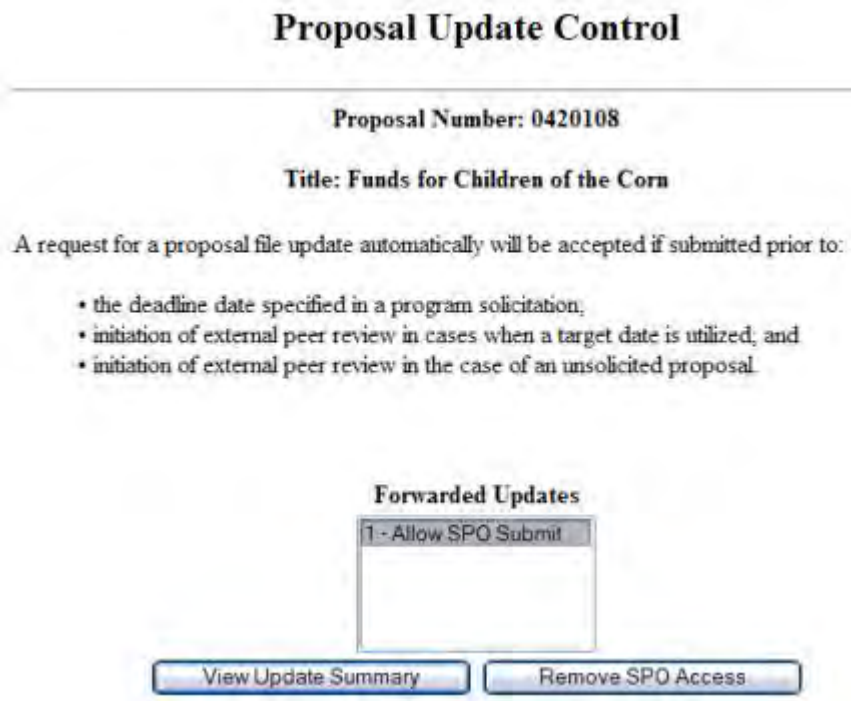


Figure 4 Proposal Update Control screen after you have given the SPO access to the Proposal File Update.

Work with Forwarded Updates

Work with Forwarded Proposal File Updates

1. On the **FastLane Home Page** screen, log in as a PI to Proposals, Awards, and Status (see PI/Co-PI Login). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management** screen displays (Figure 1).

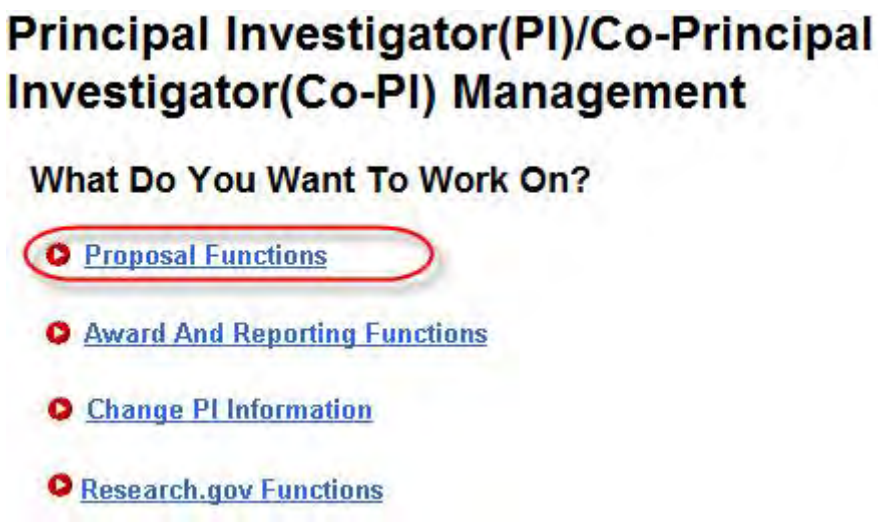


Figure 1 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management screen. The Proposal Functions link is circled.

2. Click **Proposal Functions** (Figure 1). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Proposal Functions** screen displays (Figure 2).

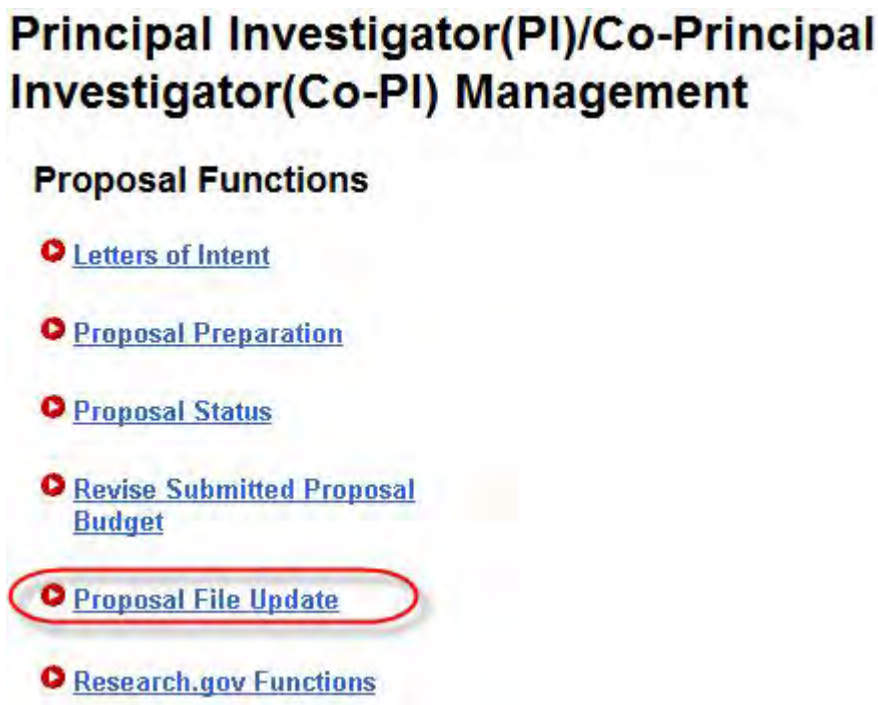


Figure 2 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Proposal Functions screen. The Proposal File Update link is circled.

3. Click **Proposal File Update** (Figure 2). The **List of Proposals Eligible for Update** screen displays (Figure 3).

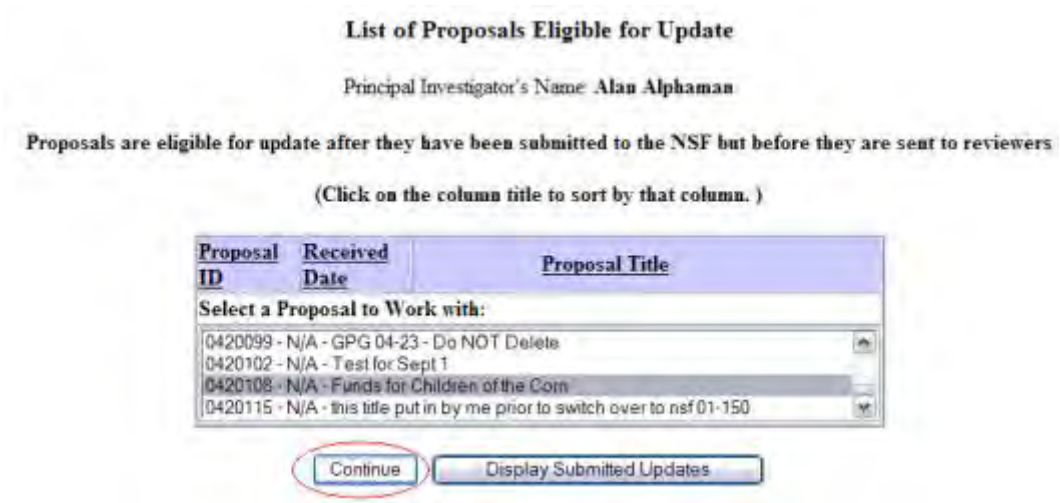


Figure 3 List of Proposals Eligible for Update screen. The Continue button is circled.

4. Highlight the proposal whose update you want to view in the **List of Proposals Eligible for Update** (Figure 3)
5. Click the **Continue** button (Figure 3). The **Proposal Update Control** screen for that proposal displays (Figure 4) with a list of the updates that the SPO has access to in the **Forward Updates** list, along with their NSF acceptance status. You have these options for working with updates that the SPO has access to:
   - View the Update Summary for a forwarded update
   - Remove SPO access to an update
   - View and print an updated proposal if the update has automatically approved status

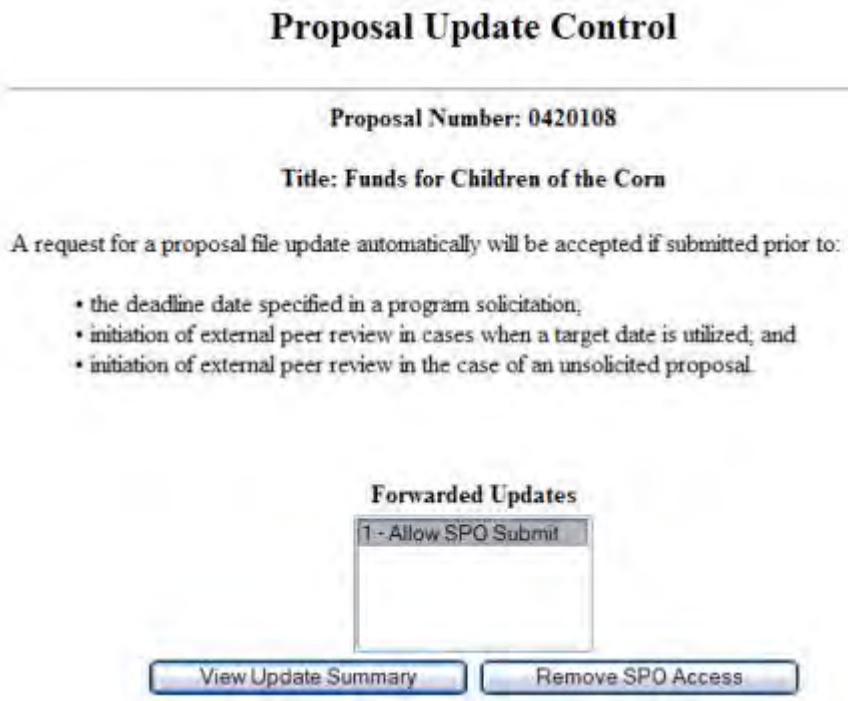


Figure 4 Proposal Update Control screen after the SPO has been given access to a Proposal File Update.

Work with Forwarded Proposal File Updates

1. On the **FastLane Home Page** screen, log in as a PI to Proposals, Awards, and Status (see PI/Co-PI Login). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management** screen displays (Figure 1).

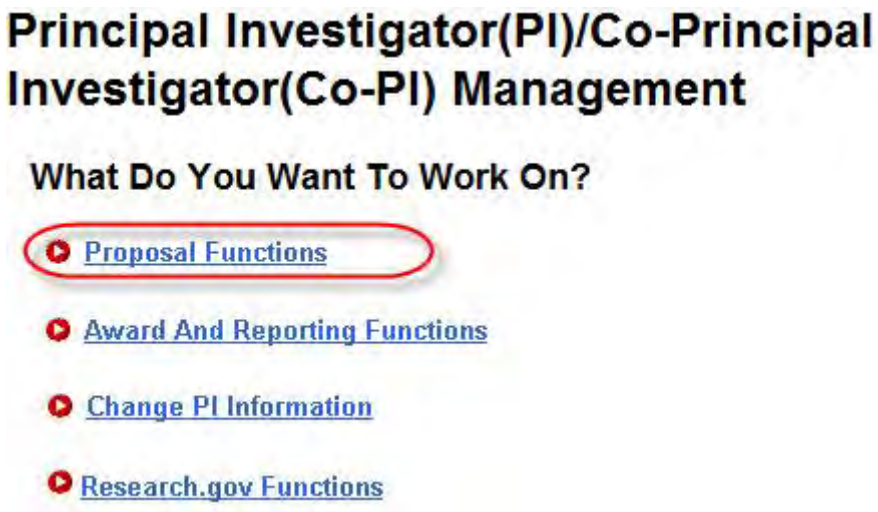


Figure 1 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management screen. The Proposal Functions link is circled.

2. Click **Proposal Functions** (Figure 1). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Proposal Functions** screen displays (Figure 2).

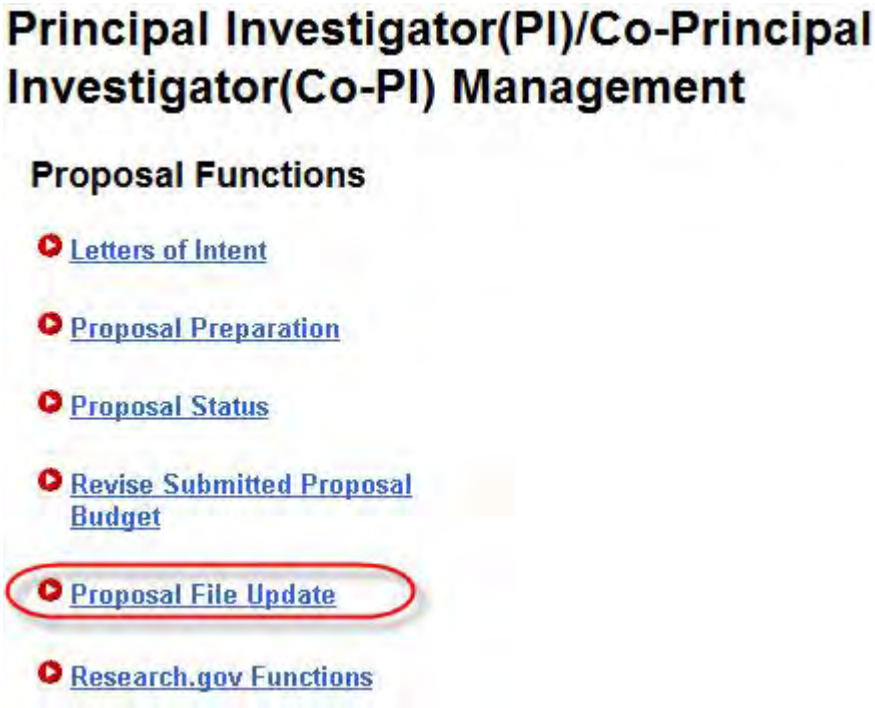


Figure 2 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Proposal Functions screen. The Proposal File Update link is circled.

3. Click **Proposal File Update** (Figure 2). The **List of Proposals Eligible for Update** screen displays (Figure 3).

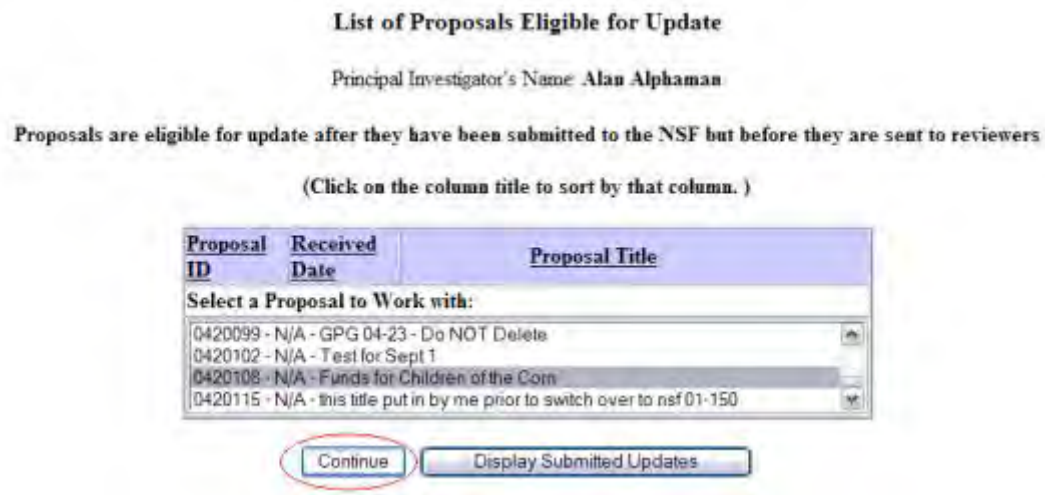


Figure 3 List of Proposals Eligible for Update screen. The Continue button is circled.

4. Highlight the proposal whose update you want to view in the **List of Proposals Eligible for Update** (Figure 3)
5. Click the **Continue** button (Figure 3). The **Proposal Update Control** screen for that proposal displays (Figure 4) with a list of the updates that the SPO has access to in the **Forward Updates** list, along with their NSF acceptance status. You have these options for working with updates that the SPO has access to:
   - View the Update Summary for a forwarded update
   - Remove SPO access to an update
   - View and print an updated proposal if the update has automatically approved status

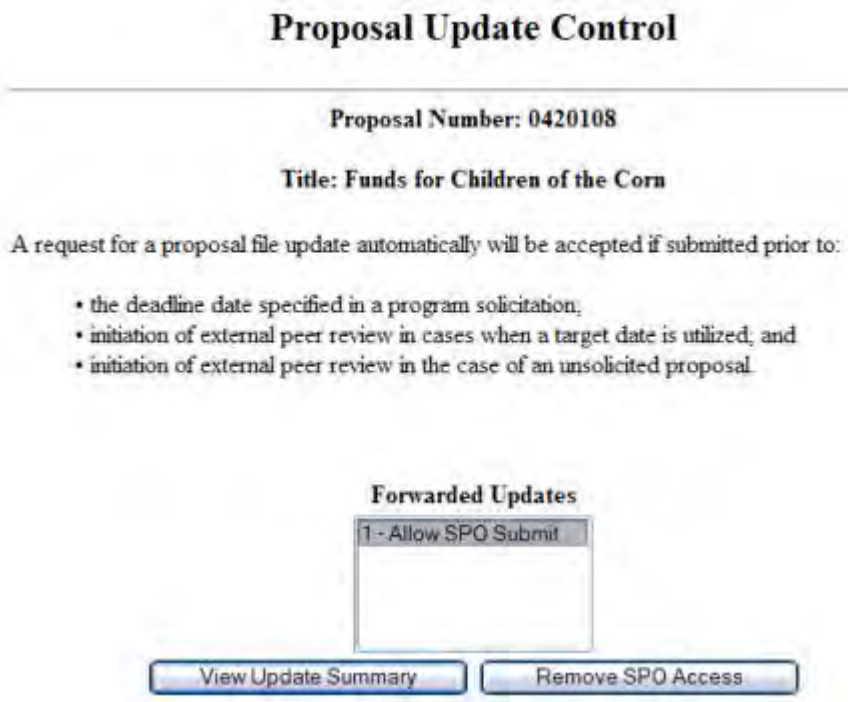


Figure 4 Proposal Update Control screen after the SPO has been given access to a Proposal File Update.

View the Update Summary for a Forwarded Update

1. Access the **Proposal File Update Control** screen (Figure 1) (see Work with Forwarded Updates).

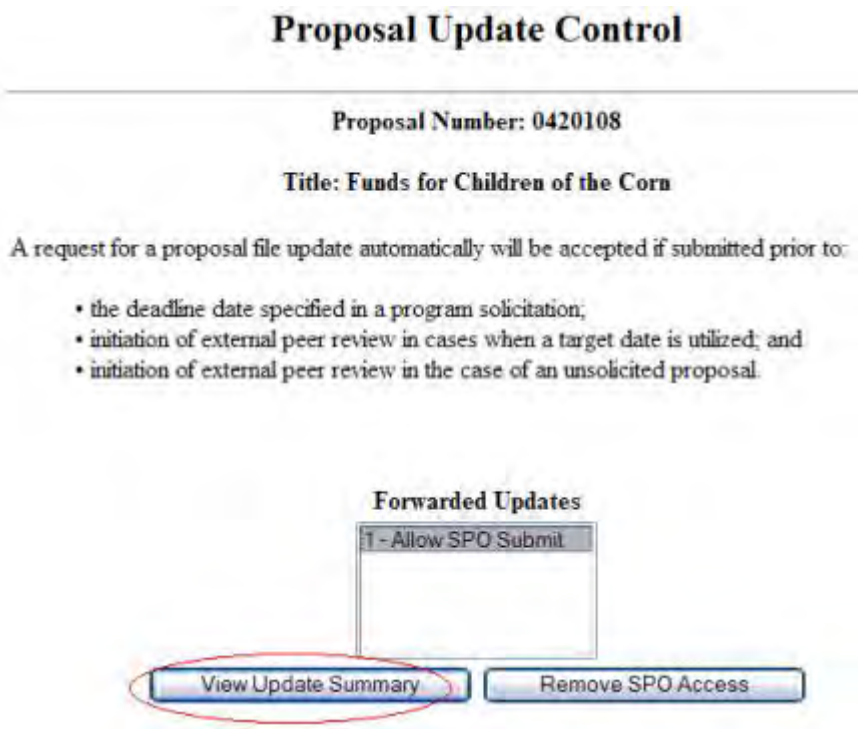


Figure 1 Proposal Update Control screen with the Forwarded Updates list. The View Update Summary button is circled.

2. Highlight in the **Forwarded Updates** list (Figure 1) the update whose Update Summary you want to view.
3. Click the **View Update Summary** button (Figure 1). The **Proposal Update Summary** screen displays (Figure 2). You have these options:
   - View the current section, the section as it was first submitted to NSF
   - View the proposed replacement section, the section as it has been updated
   - View the Justification Note for the update

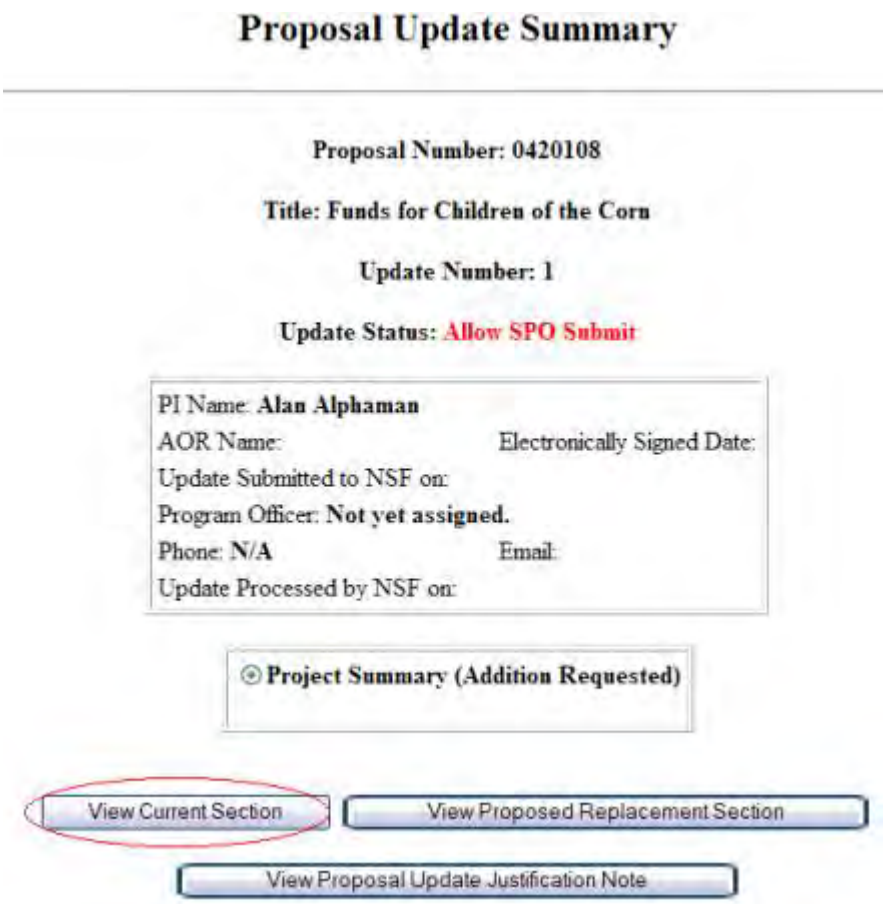


Figure 2 Proposal Update Summary screen. The View Current Section button is circled.

View the Current Section

1. On the **Proposal Update Summary** screen (Figure 2), in the box listing the updated sections, click the radio button for the current section you want to view.
2. Click the **View Current Section** button (Figure 2). The form displays in PDF format. If you need to download Adobe Reader, see Adobe Reader for FastLane.
3. Click the back button on the browser to return to the **Proposal Update Summary** screen (Figure 2).

View the Proposed Replacement Section

1. On the **Proposal Update Summary** screen (Figure 3), in the box listing the updated sections, click the radio button for the updated section that you want to view.

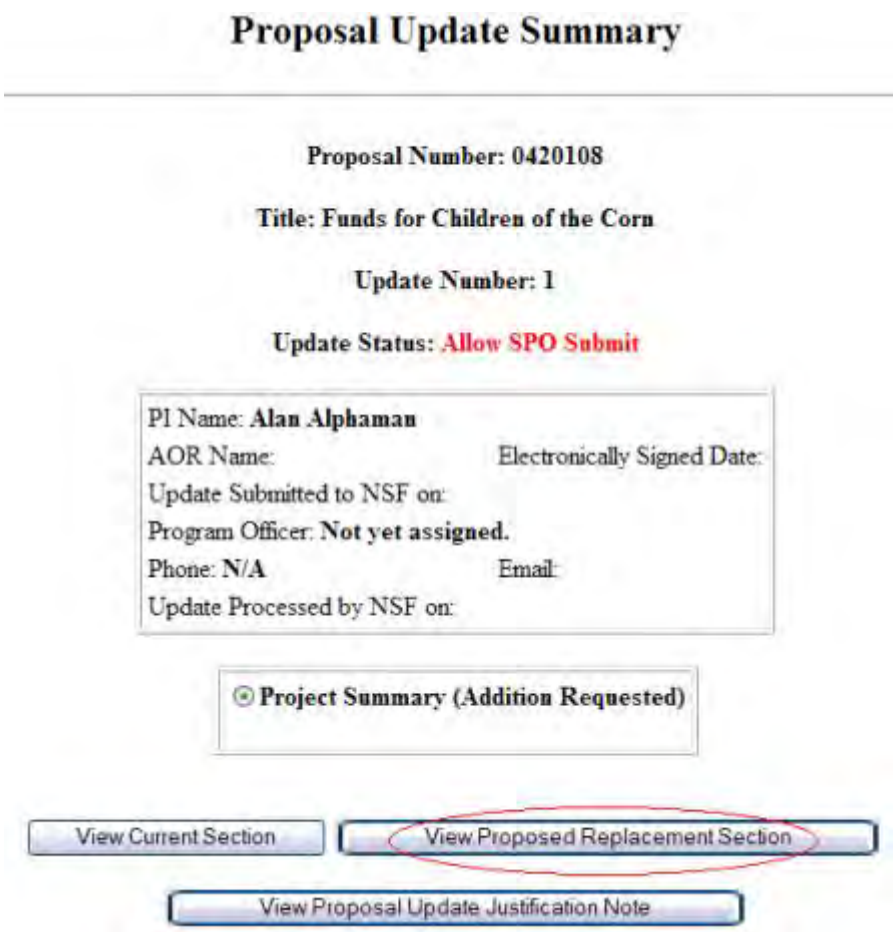


Figure 3 Proposal Update Summary screen. The View Proposed Replacement Section button is circled.

2. Click the **View Proposed Replacement Section** button (Figure 3). The section displays in PDF format. If you need to download Adobe Reader, see Adobe Reader for FastLane.
3. Click the back button on the browser to return to the **Proposal Update Summary** screen (Figure 3).

View the Justification Note

1. On the **Proposal Update Summary** screen (Figure 4), click the **View Proposal Update Justification Note** button. The **Justification Note** screen displays (Figure 5).

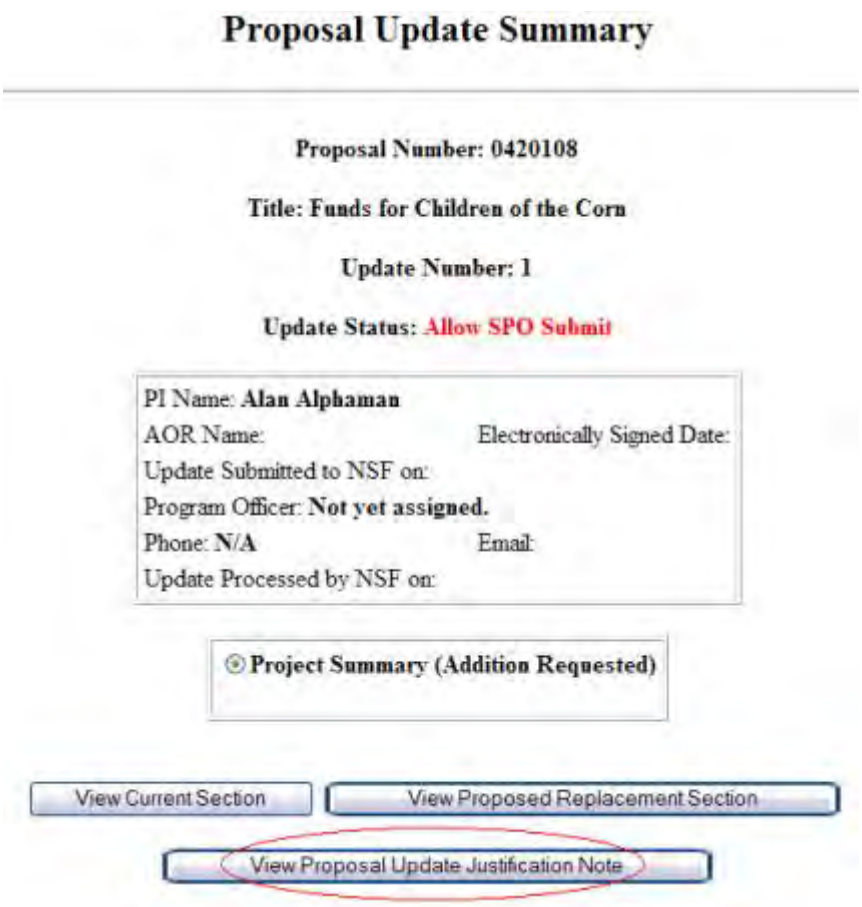


Figure 4 Proposal Update Summary screen. The View Proposal Update Justification Note button is circled.

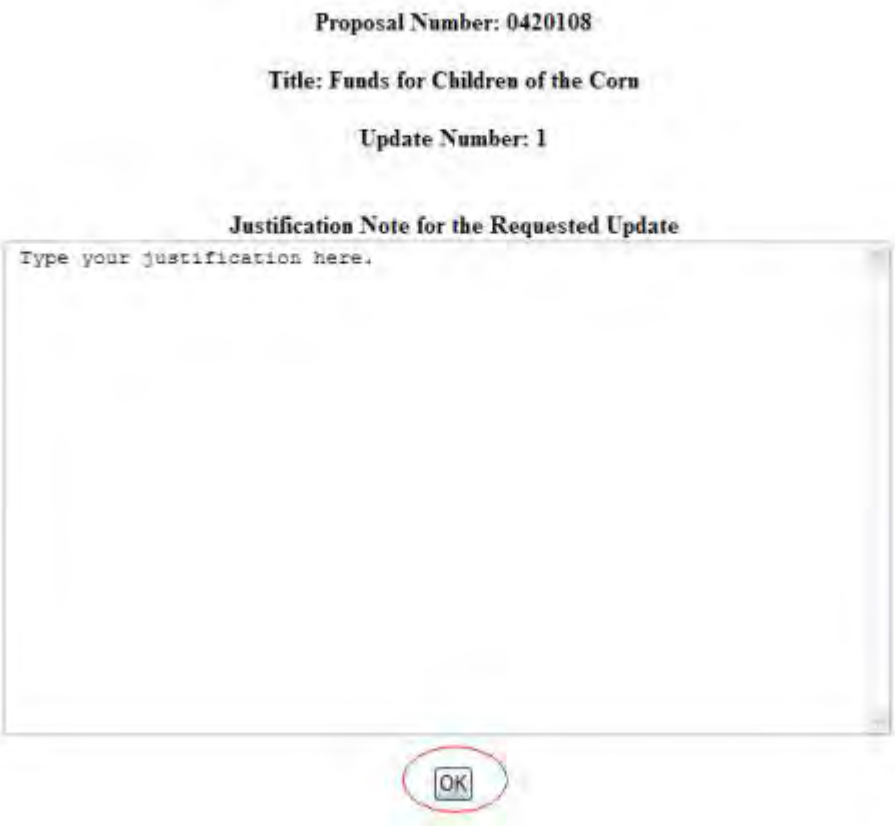


Figure 5 Justification Note screen. The OK button is circled.

2. Click the **OK** button (Figure 4). The **Proposal Update Summary** screen displays (Figure 4).

View and Print an Updated Proposal

If the Proposal File Update has the status of Automatically Accepted, on the **Proposal Update Summary** screen, you have an option to view and print the updated proposal.

1. Access the **Proposal Update Control** screen (Figure 1) (see Work with Forwarded Updates).

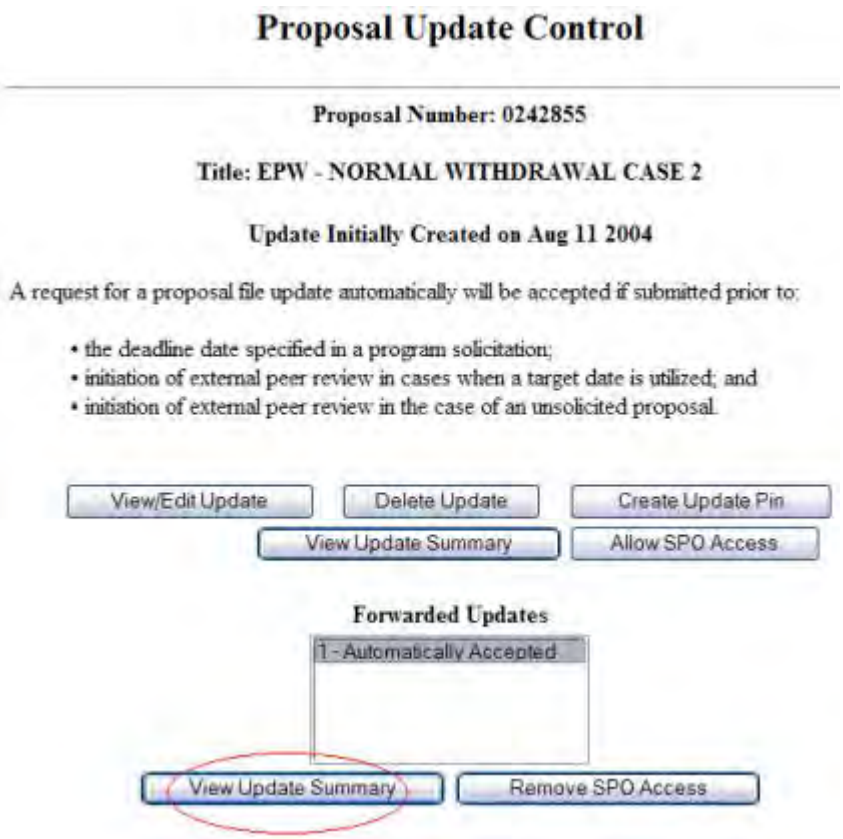


Figure 1 Proposal Update Control screen with an Automatically Accepted update highlighted. The View Update Summary button is circled.

2. Highlight the Automatically Accepted update in the **Forwarded Updates** list (Figure 1).
3. Click the **View Update Summary** button (Figure 1).The **Update Summary Log** screen displays (Figure 2).

Figure 2 Update Summary Log screen. The View / Print Proposal button is circled.

4. Click the **View / Print Proposal** button (Figure 2). The **View Submitted Proposal** screen displays (Figure 3).

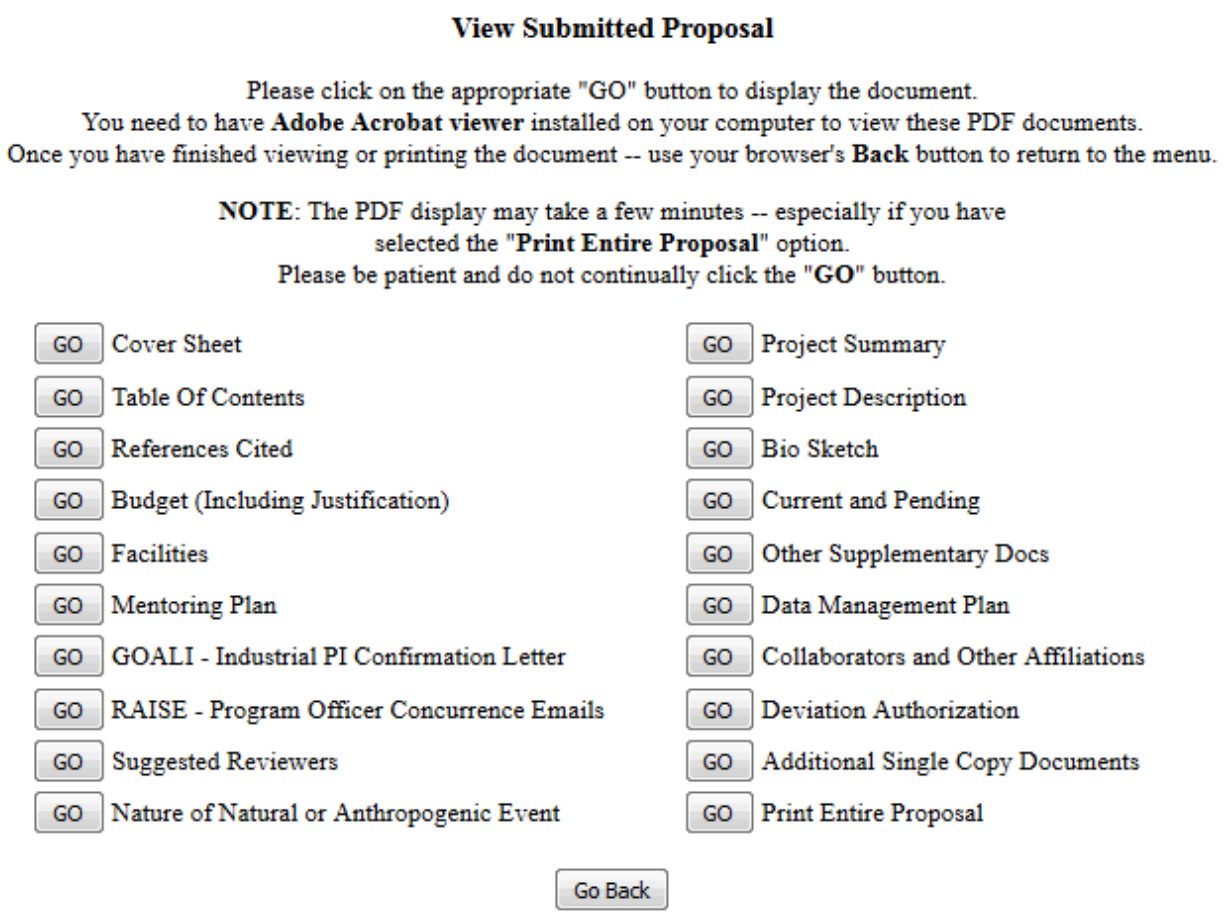


Figure 3 View Submitted Proposal screen.

5. Click the **Go** button for the section you want to view. The section displays in PDF format. If you need to download Adobe Acrobat, see Adobe Reader for FastLane.
6. Click the **Print** icon on the Adobe toolbar to print the section.
7. Click the browser back button to return to the **View Submitted Proposal** screen (Figure 3).
8. To print the entire proposal, on the **View Submitted Proposal** screen (Figure 3), click the **Go** button for Print Entire Proposal. FastLane concatenates the files for the proposal and prints the proposal as one PDF document.

View Submitted Updates

View Submitted Updates

1. On the **FastLane Home Page** screen, log in as a PI to Proposals, Awards, and Status (see PI/Co-PI Login). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management** screen displays (Figure 1).

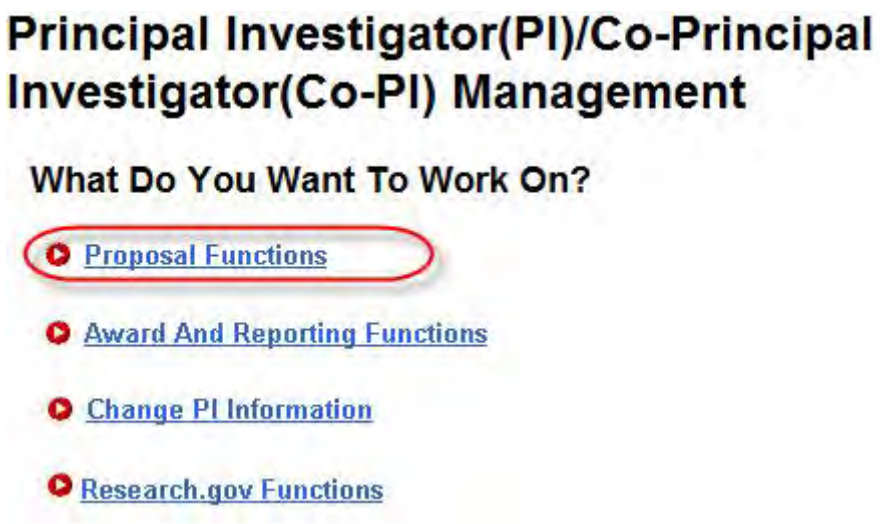


Figure 1 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management screen. The Proposal Functions link is circled.

2. Click **Proposal Functions** (Figure 1). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Proposal Functions** screen displays (Figure 2).

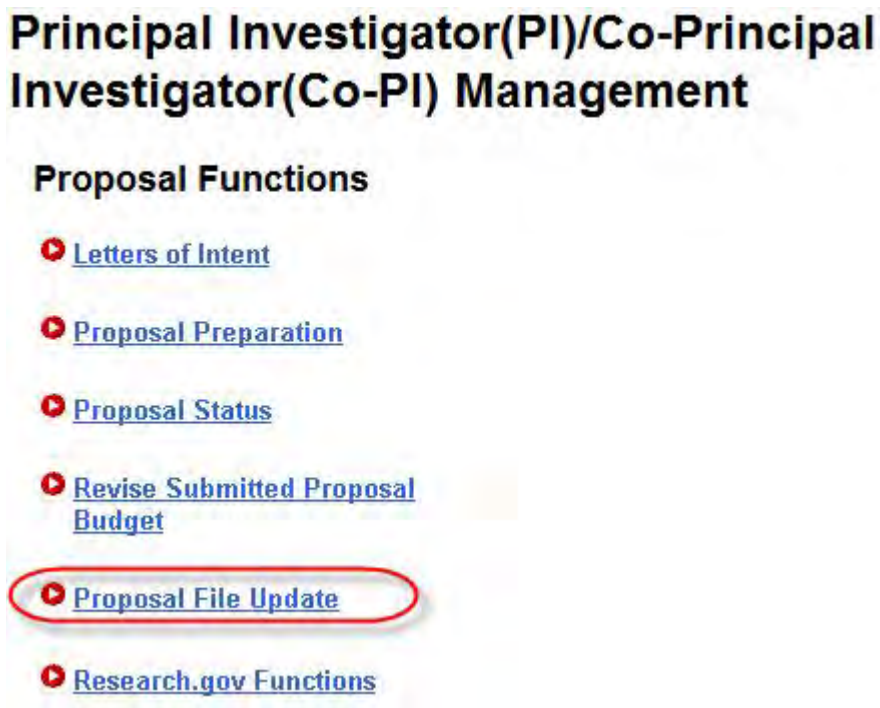


Figure 2 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Proposal Functions screen. The Proposal File Update link is circled.

3. Click **Proposal File Update** (Figure 2). The **List of Proposals Eligible for Update** screen displays (Figure 3).

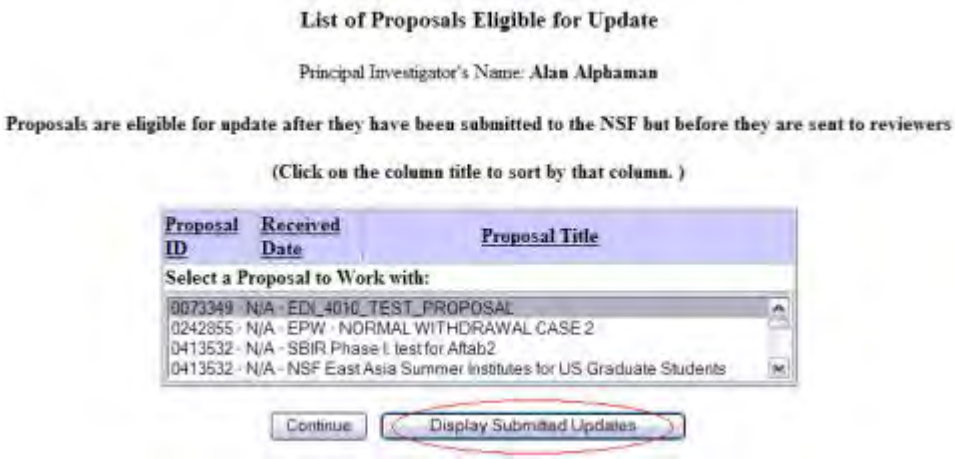


Figure 3 List of Proposals Eligible for Update screen. The Display Submitted Updates button is circled.

4. Click the **Display Submitted Updates** button (Figure 3). The **Submitted Proposal File Updates** screen displays (Figure 4).

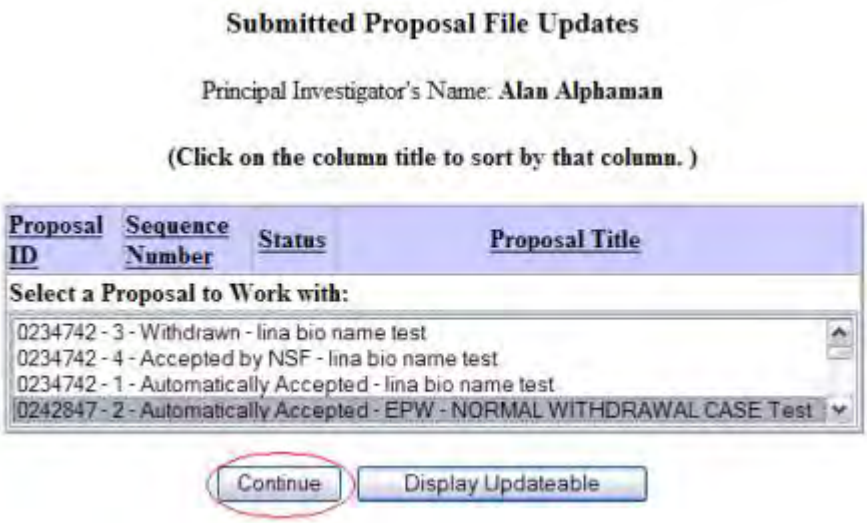


Figure 4 Submitted Proposal File Updates screen. The Continue button is circled.

5. Highlight the proposal whose update you want to check from the **Submitted Proposal File Updates** list (Figure 4).
6. Click the **Continue** button (Figure 4). The **Update Summary Log** screen displays (Figures 5) with the status of the Proposal File Update and a listing of the updated sections. You have these options:
   - View the initial file, the file as it was originally submitted to NSF
   - View the replacement file, the file as it has been updated
   - View the Justification Note for the update

- View/print the updated proposal (if the Proposal File Update has Automatically Accepted status)

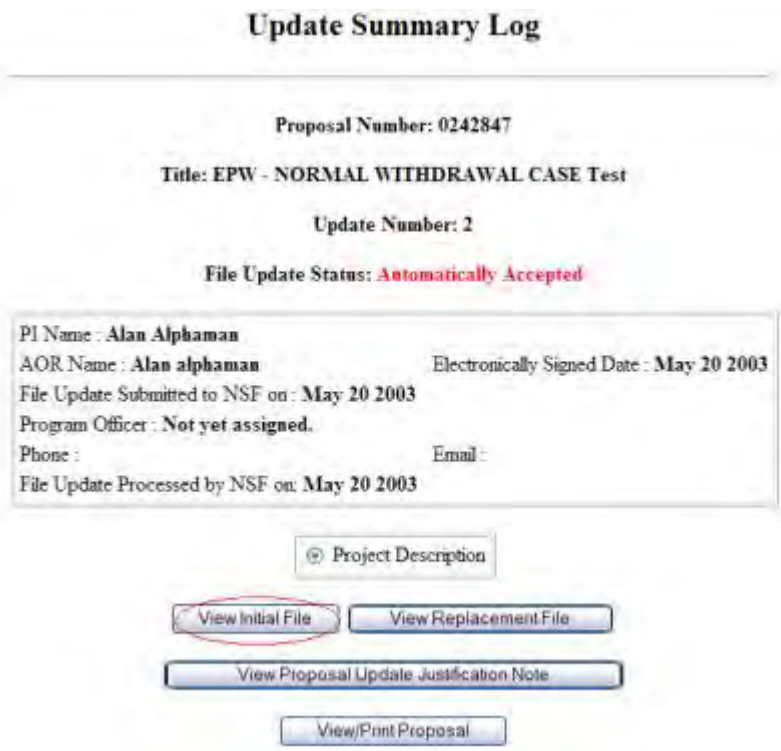


Figure 5 Update Summary Log screen. The View Initial File button is circled.

View the Initial File

1. On the **Update Summary Log** screen (Figure 5), in the box listing the updated file, click the radio button for the initial file you want to view.
2. Click the **View Initial File** button (Figure 5). The form displays in PDF format. If you need to download Adobe Reader, see Adobe Reader for FastLane.
3. Click the back button on the browser to return to the **Update Summary Log** screen (Figure 5).

View the Replacement File

1. On the **Update Summary Log** screen (Figure 6), in the box listing the updated sections, click the radio button for the replacement file you want to view.

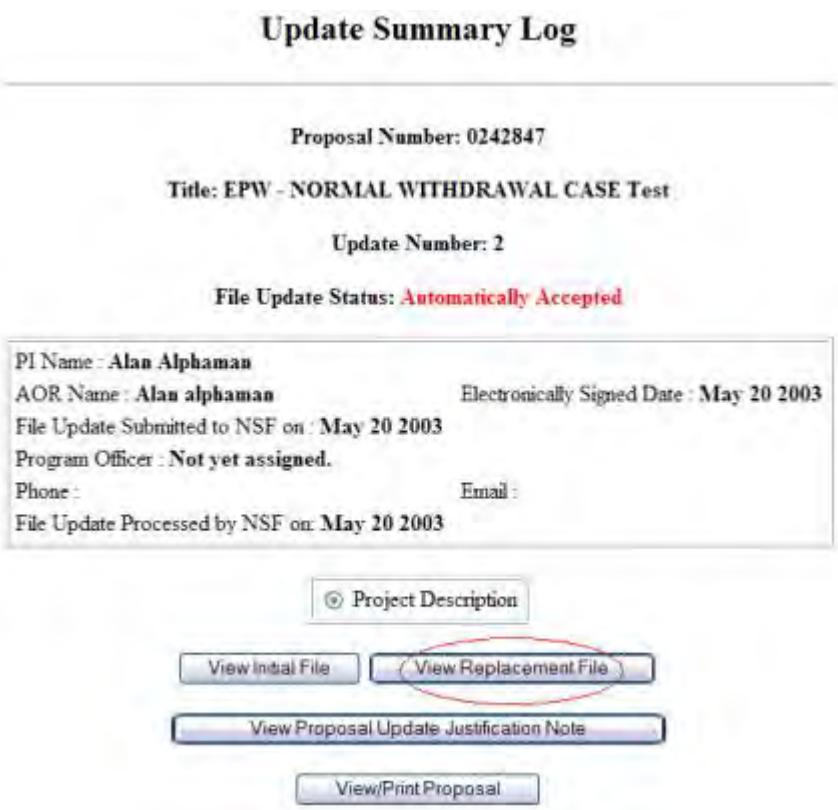


Figure 6 Update Summary Log screen. The View Replacement File button is circled.

2. Click the **View Proposed Replacement Section** button (Figure 6). The section displays in PDF format. If you need to download Adobe Reader, see Adobe Reader for FastLane.
3. Click the back button on the browser to return to the **Update Summary Log** screen (Figure 6).

View the Justification Note

1. On the **Update Summary Log** screen (Figure 7), click the **View Proposal Update Justification Note** button. The **Justification Note** screen displays (Figure 8).

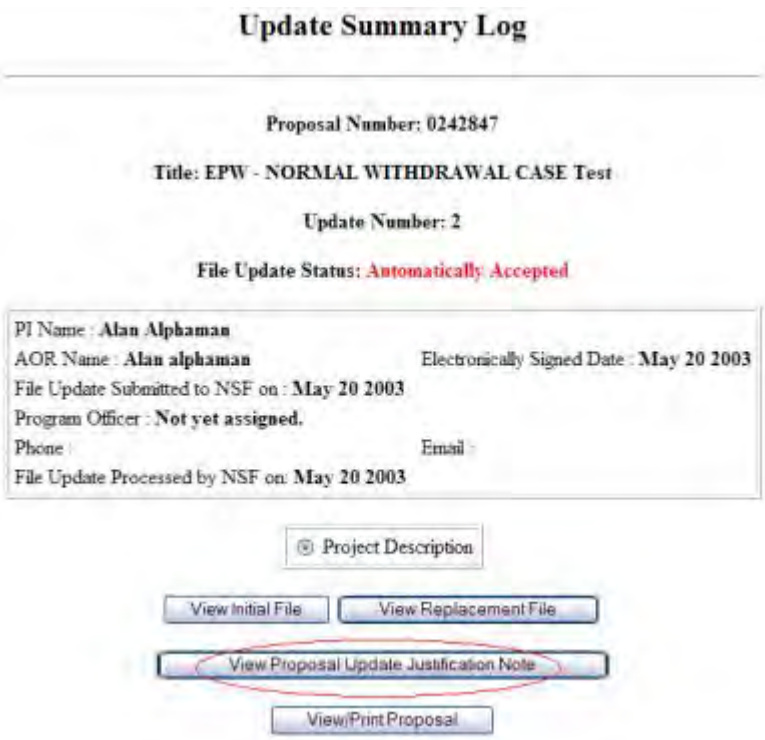


Figure 7 Update Summary Log screen. The View Proposal Update Justification Note button is circled.

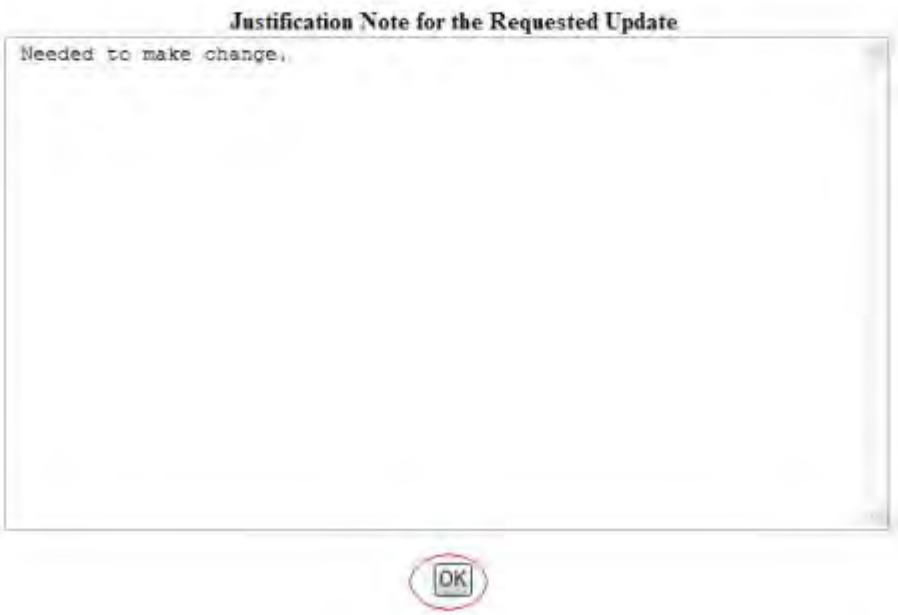


Figure 8 Justification Note screen. The OK button is circled.

2. Click the **OK** button (Figure 8). The **Update Summary Log** screen displays (Figure 7).

View Submitted Updates

1. On the **FastLane Home Page** screen, log in as a PI to Proposals, Awards, and Status (see PI/Co-PI Login). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management** screen displays (Figure 1).

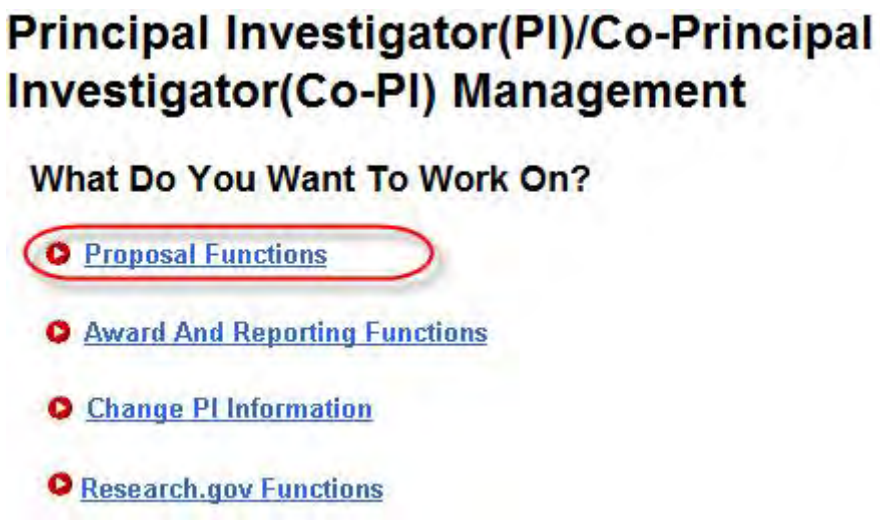


Figure 1 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management screen. The Proposal Functions link is circled.

2. Click **Proposal Functions** (Figure 1). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Proposal Functions** screen displays (Figure 2).

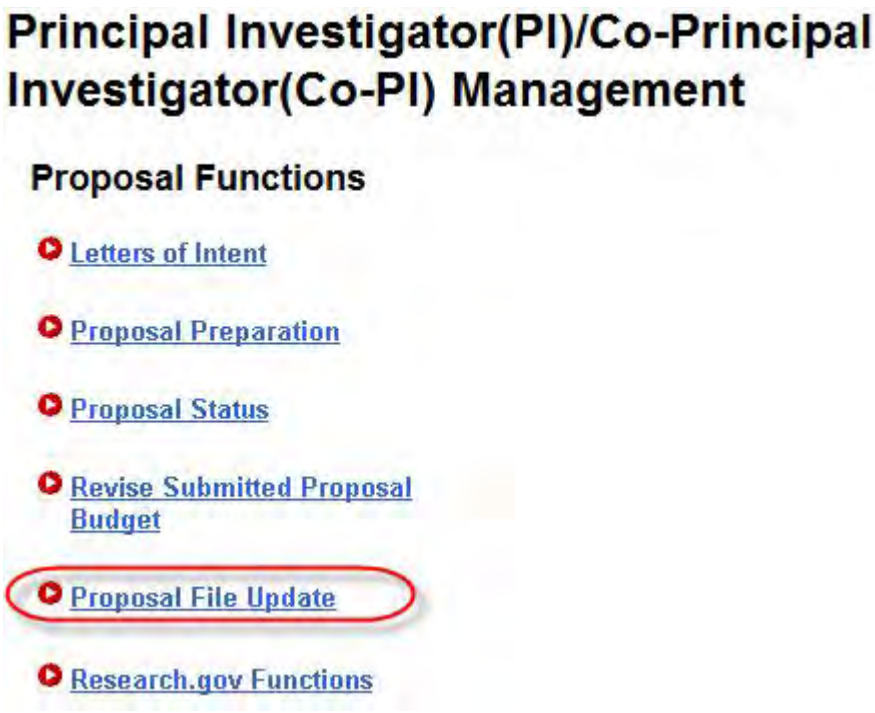


Figure 2 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Proposal Functions screen. The Proposal File Update link is circled.

3. Click **Proposal File Update** (Figure 2). The **List of Proposals Eligible for Update** screen displays (Figure 3).

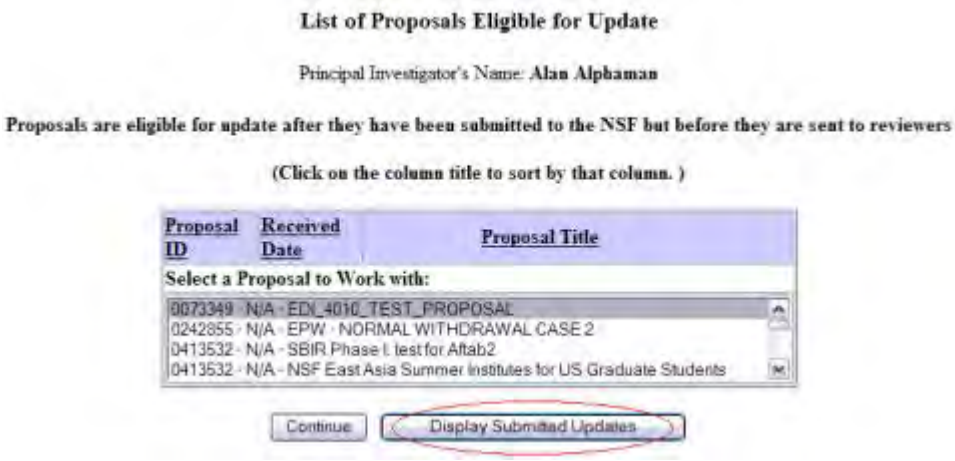


Figure 3 List of Proposals Eligible for Update screen. The Display Submitted Updates button is circled.

4. Click the **Display Submitted Updates** button (Figure 3). The **Submitted Proposal File Updates** screen displays (Figure 4).

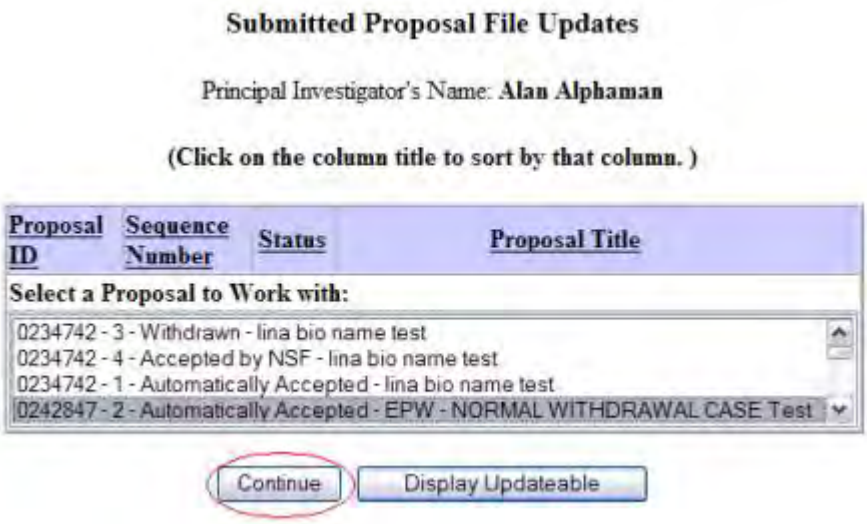


Figure 4 Submitted Proposal File Updates screen. The Continue button is circled.

5. Highlight the proposal whose update you want to check from the **Submitted Proposal File Updates** list (Figure 4).
6. Click the **Continue** button (Figure 4). The **Update Summary Log** screen displays (Figures 5) with the status of the Proposal File Update and a listing of the updated sections. You have these options:
   - View the initial file, the file as it was originally submitted to NSF
   - View the replacement file, the file as it has been updated
   - View the Justification Note for the update
   - View/print the updated proposal (if the Proposal File Update has Automatically Accepted status)

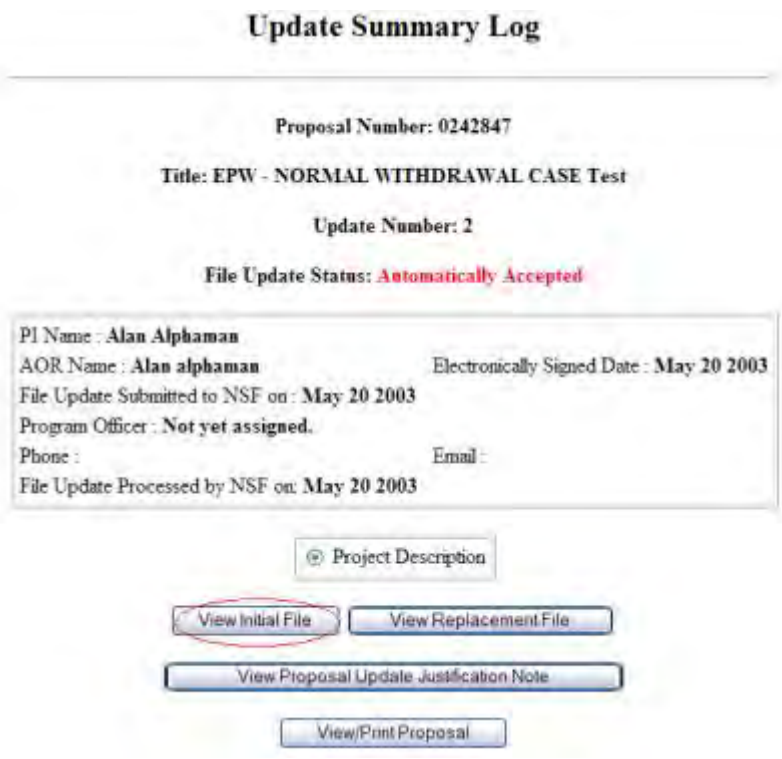


Figure 5 Update Summary Log screen. The View Initial File button is circled.

View the Initial File

1. On the **Update Summary Log** screen (Figure 5), in the box listing the updated file, click the radio button for the initial file you want to view.
2. Click the **View Initial File** button (Figure 5). The form displays in PDF format. If you need to download Adobe Reader, see Adobe Reader for FastLane.
3. Click the back button on the browser to return to the **Update Summary Log** screen (Figure 5).

View the Replacement File

1. On the **Update Summary Log** screen (Figure 6), in the box listing the updated sections, click the radio button for the replacement file you want to view.

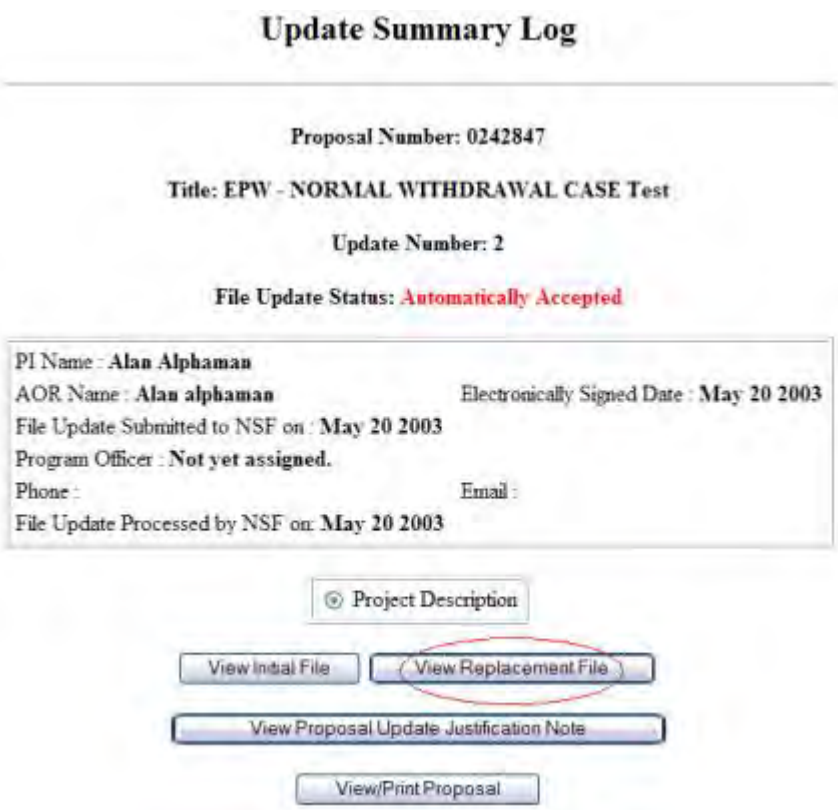


Figure 6 Update Summary Log screen. The View Replacement File button is circled.

2. Click the **View Proposed Replacement Section** button (Figure 6). The section displays in PDF format. If you need to download Adobe Reader, see Adobe Reader for FastLane.
3. Click the back button on the browser to return to the **Update Summary Log** screen (Figure 6).

View the Justification Note

1. On the **Update Summary Log** screen (Figure 7), click the **View Proposal Update Justification Note** button. The **Justification Note** screen displays (Figure 8).

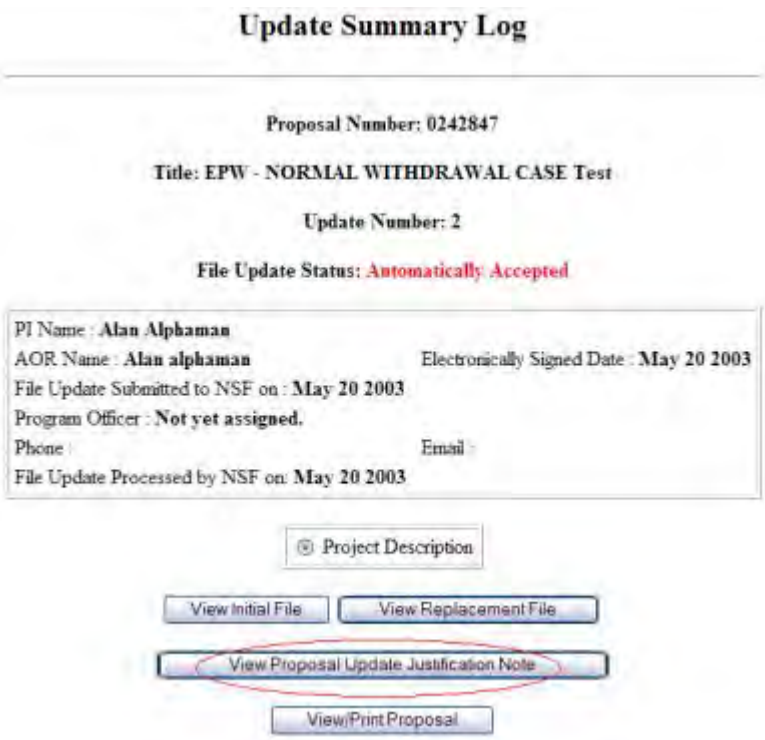


Figure 7 Update Summary Log screen. The View Proposal Update Justification Note button is circled.

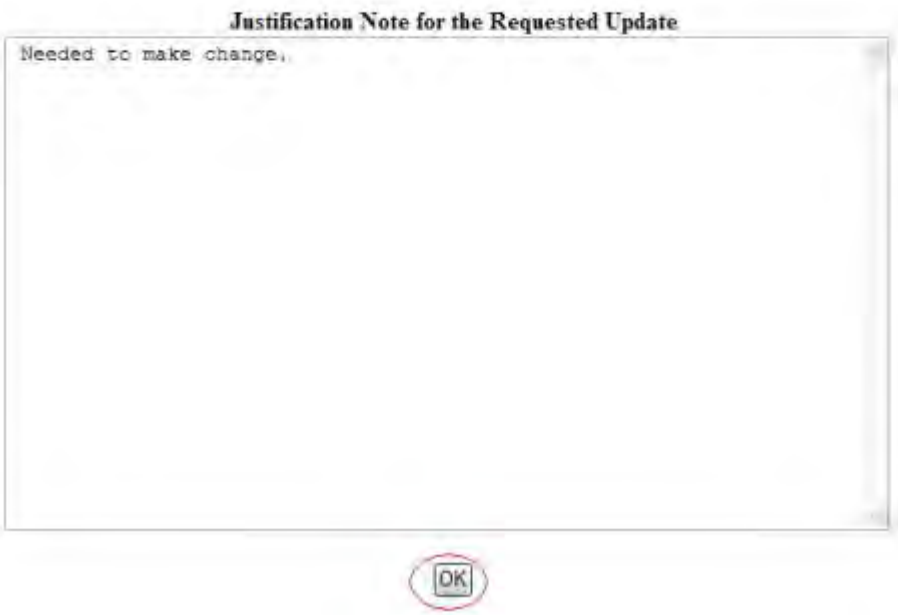


Figure 8 Justification Note screen. The OK button is circled.

2. Click the **OK** button (Figure 8). The **Update Summary Log** screen displays (Figure 7).

View and Print a Submitted Proposal File Update

If a Proposal File Update has the status of Automatically Accepted, on the **Update Summary Log** screen, you have the option to view and print the updated proposal.

1. Access the **Update Summary Log** screen (Figure 1) (see View Submitted Updates, Step 1 through Step 6).

Figure 1 Update Summary Log screen. The View / Print Proposal button is circled.

2. Click the **View / Print Proposal** button (Figure 2). The **View Submitted Proposal** screen displays (Figure 3).

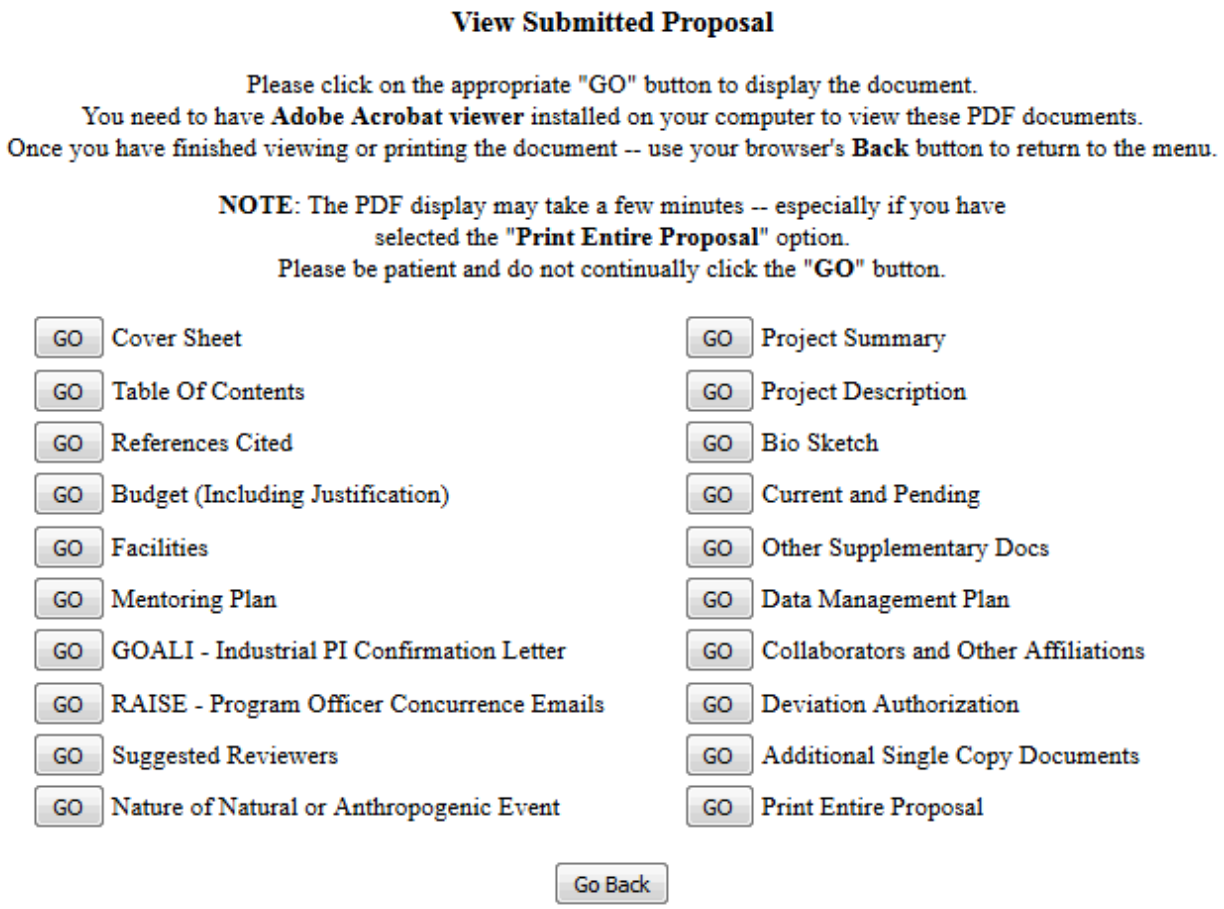


Figure 2 View Submitted Proposal screen.

3. Click the **Go** button for any section you want to view. The section displays in PDF format. If you need to download Adobe Acrobat, see Adobe Reader for FastLane.
4. Click the **Print** icon on the Adobe toolbar to print the section.
5. To print the entire proposal, click the **Go** button for Print Entire Proposal (Figure 2). FastLane concatenates the files for the proposal and prints the proposal as one PDF document.

SPO Functions

Work on Proposal File Updates as SPO

Print the contents of the SPO Functions for Updating a Submitted Proposal book.

As an SPO, you work with two kinds of Proposal File Updates:

- Updates forwarded to you by a PI
- Updates that the AOR has submitted to NSF

Work on Proposal File Updates as SPO

Print the contents of the SPO Functions for Updating a Submitted Proposal book.

As an SPO, you work with two kinds of Proposal File Updates:

- Updates forwarded to you by a PI
- Updates that the AOR has submitted to NSF

Work with Forwarded Proposal File Updates

Work on Forwarded Proposal File Updates as an SPO

1. On the **FastLane Home Page** screen, log into Research Administration as an SPO (see SPO/AOR Login). The **Research Administration** screen (Figure 1) displays.

Figure 1 Research Administration screen. The Proposals/Supplements/File Updates/Withdrawals link is circled.

2. Click **Proposals/Supplements/File Updates/Withdrawals** (Figure 1). The **Proposals/Supplements/File Updates/Withdrawals** screen displays (Figure 2) with these tabs:
   - The **Documents in Progress** tab screen shows all the documents of your organization that are now in progress.
   - The **Withdrawals in Progress** tab screen shows any proposal withdrawals that have been forwarded to the SPO.
   - The **Submitted Documents** tab screen shows all the documents that have been submitted to NSF, including submitted Proposal File Updates.

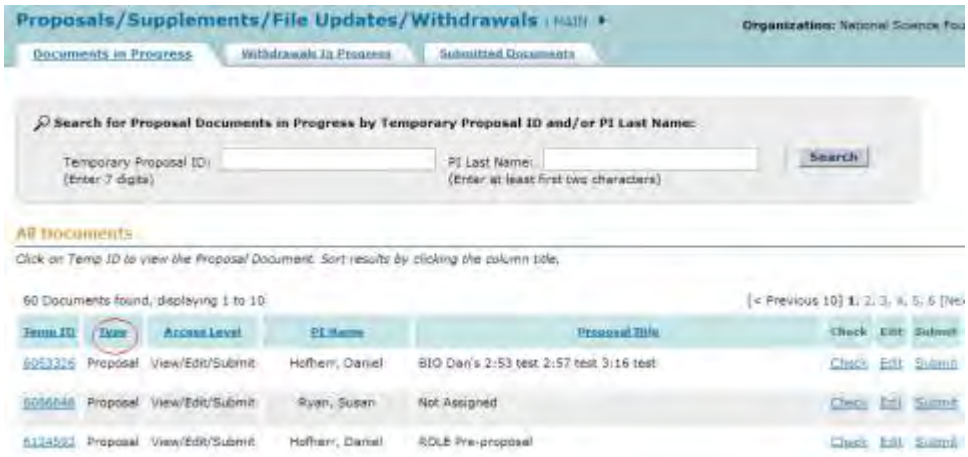


Figure 2 Proposals/Supplements/File Updates/Withdrawals screen showing the tabs for Documents in Progress, Withdrawals in Progress, and Submitted Documents. The Type column header is circled.

3. Click the **Type** column header to group all updates together (Figure 2). The **Proposals/Supplements/File Updates/Withdrawals** screen displays (Figure 3) with the updates grouped together. You have these options for working with Proposal File Updates:
   - View the Update Summary
   - Check an update for completeness for submission to NSF
   - Edit an update
   - Submit an update (AOR only)
   - Return an update to the PI

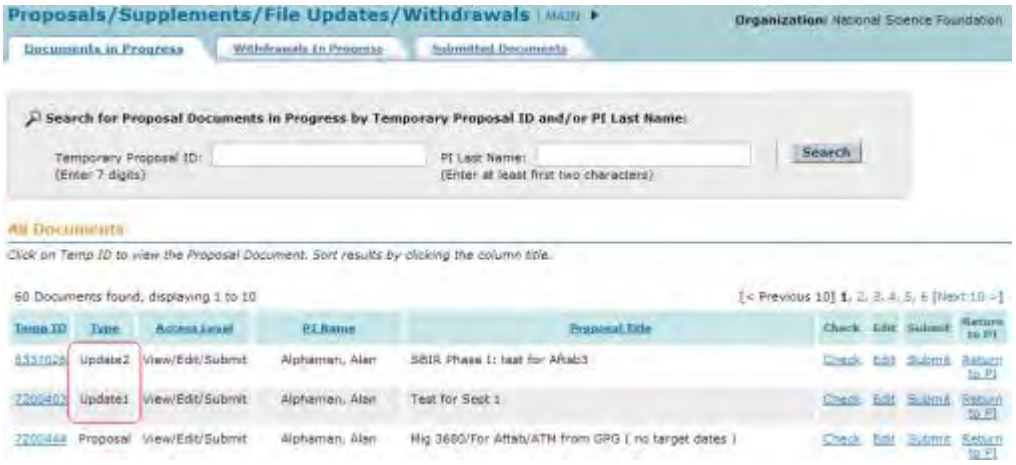


Figure 3 Documents in Progress tab on the Proposals/Supplements/File Updates/Withdrawals screen with the updates (boxed in red) now grouped together.

Work on Forwarded Proposal File Updates as an SPO

1. On the **FastLane Home Page** screen, log into Research Administration as an SPO (see SPO/AOR Login). The **Research Administration** screen (Figure 1) displays.

Figure 1 Research Administration screen. The Proposals/Supplements/File Updates/Withdrawals link is circled.

2. Click **Proposals/Supplements/File Updates/Withdrawals** (Figure 1). The **Proposals/Supplements/File Updates/Withdrawals** screen displays (Figure 2) with these tabs:
   - The **Documents in Progress** tab screen shows all the documents of your organization that are now in progress.
   - The **Withdrawals in Progress** tab screen shows any proposal withdrawals that have been forwarded to the SPO.
   - The **Submitted Documents** tab screen shows all the documents that have been submitted to NSF, including submitted Proposal File Updates.

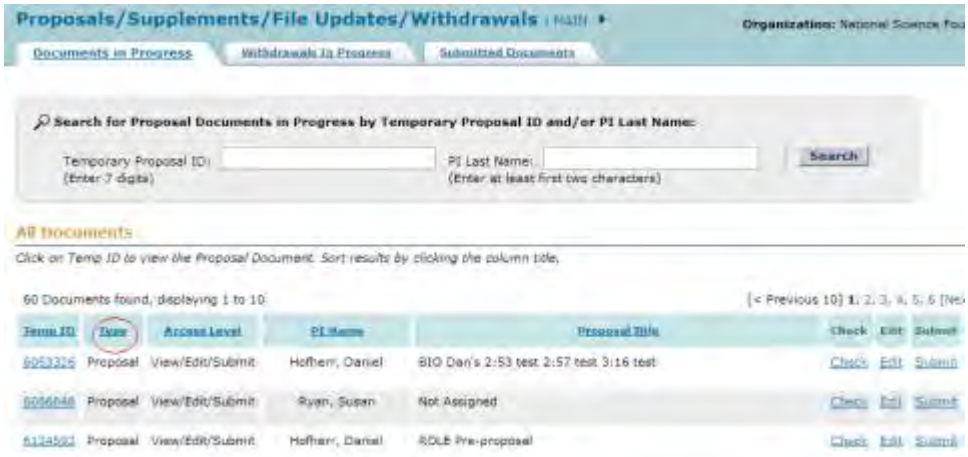


Figure 2 Proposals / Supplements / File Updates / Withdrawals screen showing the tabs for Documents in Progress, Withdrawals in Progress, and Submitted Documents. The Type column header is circled.

3. Click the **Type** column header to group all updates together (Figure 2). The **Proposals / Supplements / File Updates / Withdrawals** screen displays (Figure 3) with the updates grouped together. You have these options for working with Proposal File Updates:
   - View the Update Summary
   - Check an update for completeness for submission to NSF
   - Edit an update
   - Submit an update (AOR only)
   - Return an update to the PI

Figure 3 Documents in Progress tab on the Proposals / Supplements / File Updates / Withdrawals screen with the updates (boxed in red) now grouped together.

View the Update Summary as an SPO/AOR

1. Access the **Proposals / Supplements / File Updates / Withdrawals** screen on the **Documents in Progress** tab (Figure 1) (see Work on Forwarded Proposal File Updates).

Figure 1 Proposals/Supplements/File Updates/Withdrawals screen on the Documents in Progress tab. The Temp ID for a Proposal File Update is circled.

2. Click the **Temp ID** number (Figure 1) for the Proposal File Update that you want to view the Update Summary for. The **Proposal Update Summary** screen displays (Figure 2) with the status of the update. On the **Proposal Update Summary** screen, you have these options:
   - View the current section, the section as it was originally submitted to NSF
   - View the proposed replacement section, the section as it has been updated
   - View the Justification Note for the update

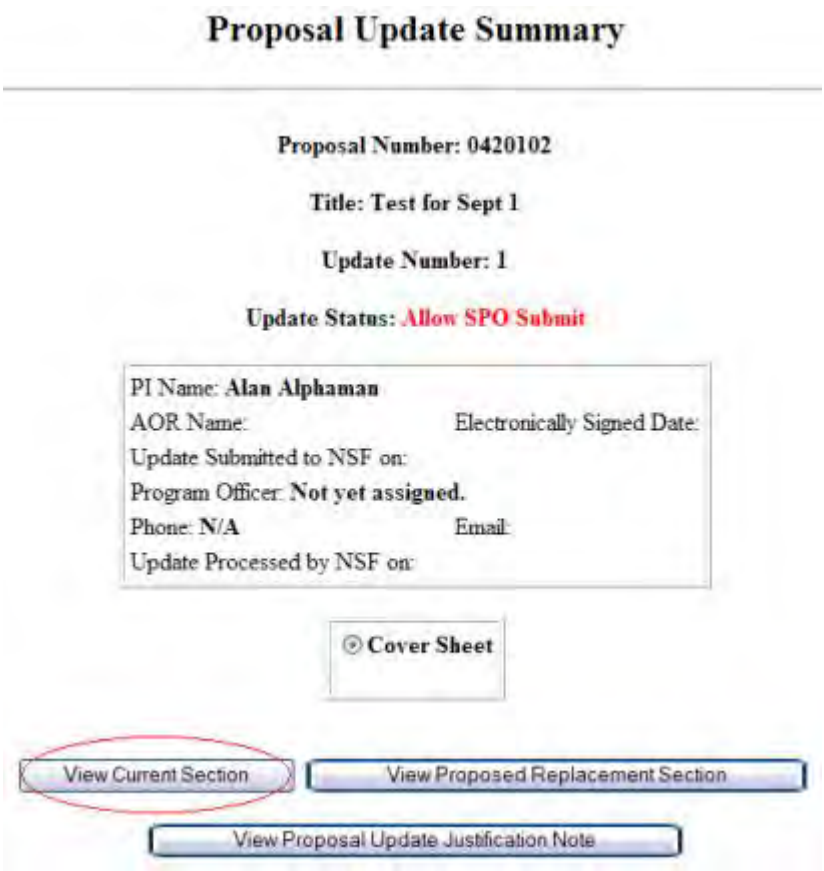


Figure 2 Proposal Update Summary screen. The View Current Section button is circled.

View the Current Section

1. On the **Proposal Update Summary** screen (Figure 2), in the box listing the updated sections, click the radio button for the current section you want to view.
2. Click the **View Current Section** button (Figure 2). The section displays in PDF format. If you need to download Adobe Reader, see Adobe Reader for FastLane.
3. Click the back button on the browser to return to the **Proposal Update Summary** screen.

View the Proposed Replacement Section

1. On the **Proposal Update Summary** screen (Figure 3), click the radio button for the updated section you want to view.

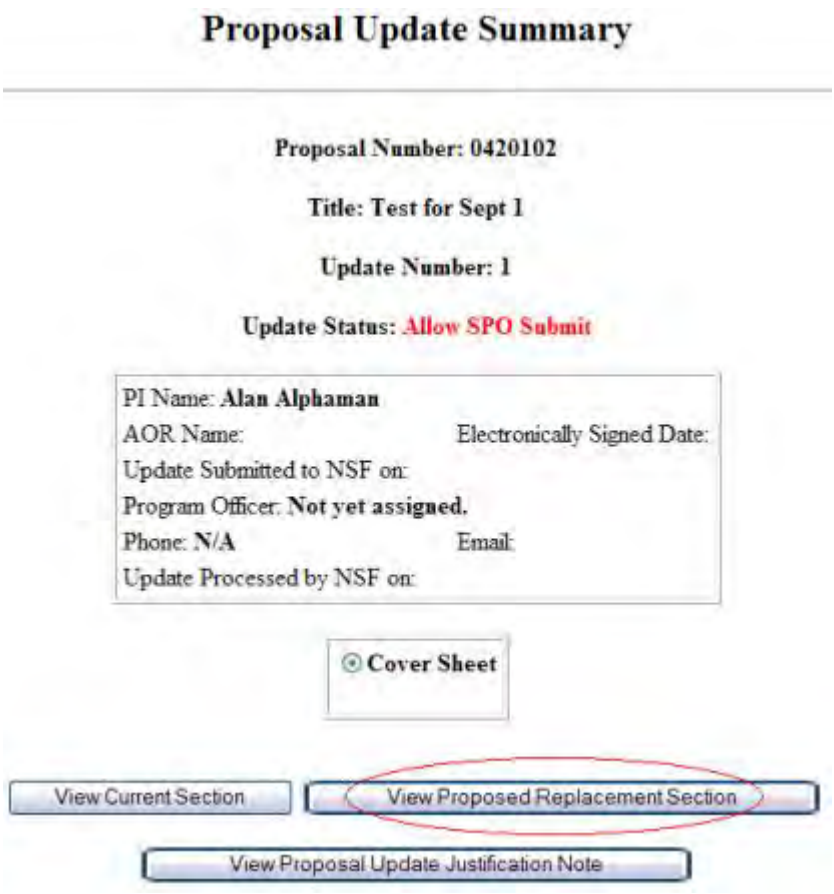


Figure 3 Proposal Update Summary screen. The View Proposed Replacement Section button is circled.

2. Click the **View Proposed Replacement Section** button (Figure 3). The section displays in PDF format. If you need to download Adobe Acrobat, see Adobe Reader for FastLane.
3. Click the back button on the browser to return to the **Proposal Update Summary** screen (Figure 3).

View the Justification Note

1. On the **Proposal Update Summary** screen (Figure 4), click the **View Proposal Update Justification Note** button. The **Justification Note** screen displays (Figure 5).

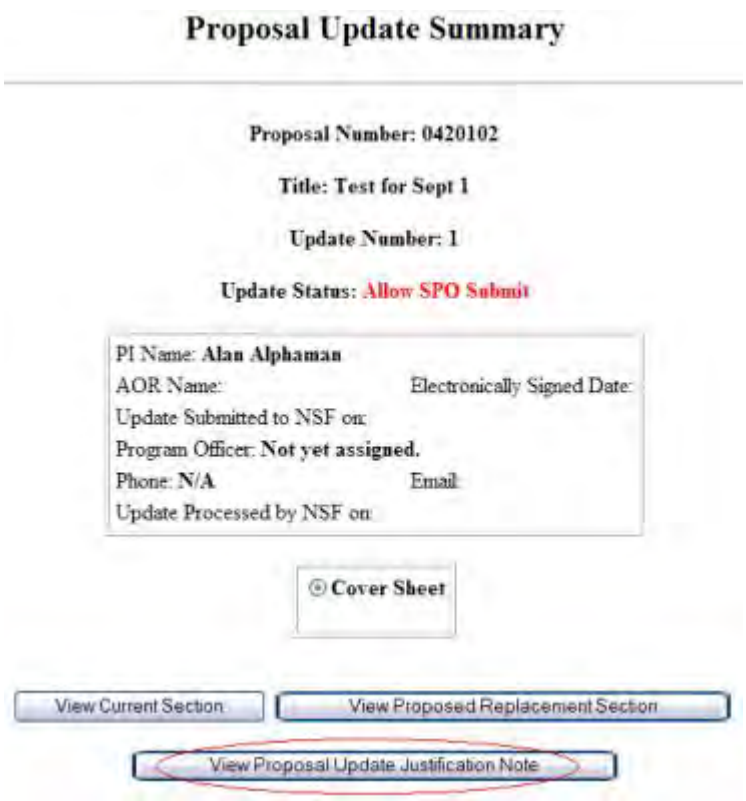


Figure 4 Proposal Update Summary screen. The View Proposal Update Justification Note button is circled.

Figure 5 Justification Note screen. The OK button is circled.

2. Click the **OK** button (Figure 5). The **Proposal Update Summary** screen displays (Figure 4).

Check a Proposal File Update for Completeness

1. Access the **Proposals / Supplements / File Updates / Withdrawals** screen on the **Documents in Progress** tab (Figure 1) (see Work on Forwarded Proposal File Updates).

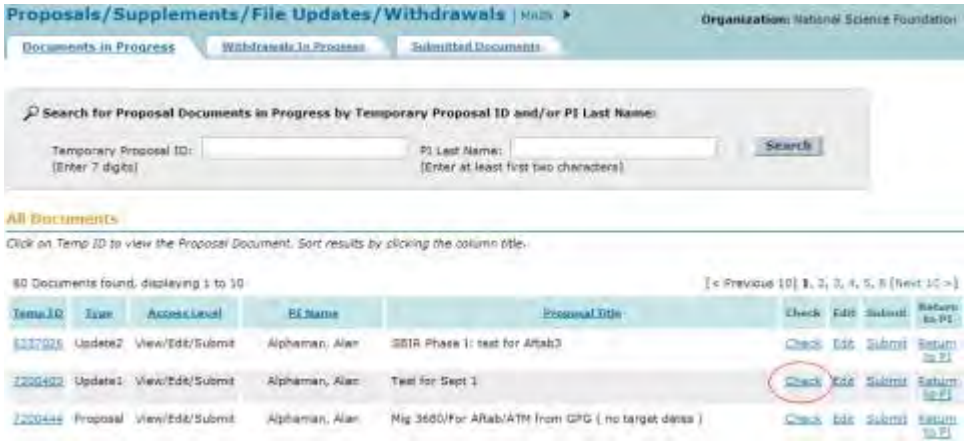


Figure 1 Proposals / Supplements / File Updates / Withdrawals screen on the Documents in Progress tab. The Check link is circled.

2. Click **Check** (Figure 1) in the row for the Proposal File Update you want to check. The **Proposal File Update Errors / Warnings** screen is displayed with a list of proposal items that have not been completed.

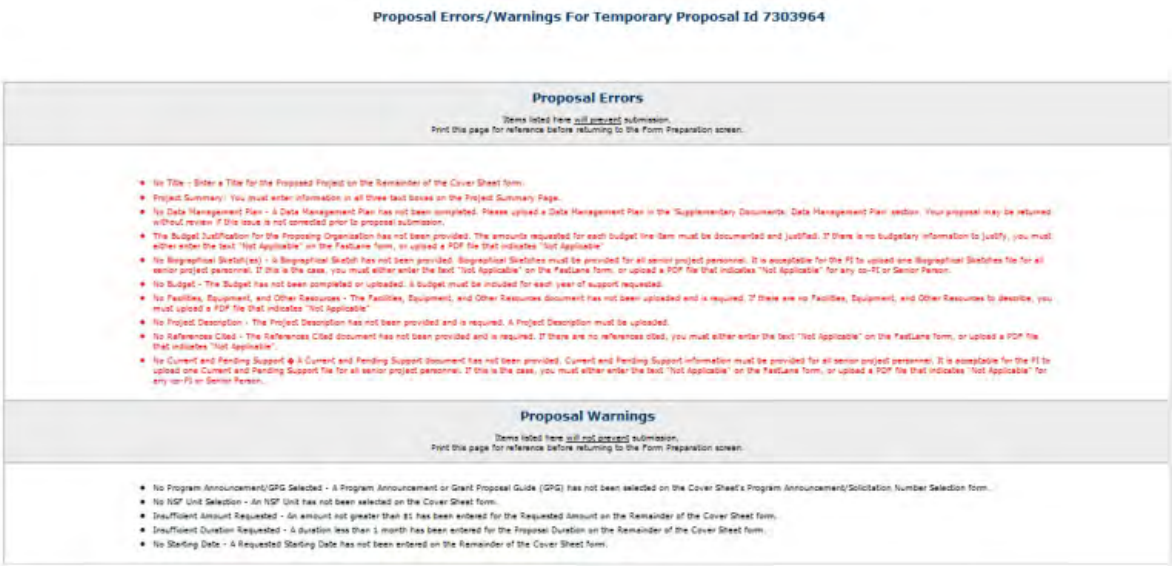


Figure 2 Proposal File Update Errors / Warnings screen.

3. Click **Return to List** to return to the **Proposals / Supplements / File Updates / Withdrawals** screen.

Edit a Proposal File Update as an SPO/AOR

1. Access the **Proposals / Supplements / File Updates / Withdrawal** screen on the **Documents in Progress** tab (Figure 1) (see Work on Forwarded Proposal File Updates).

Figure 1 Proposals / Supplements / File Updates / Withdrawal screen on the Documents in Progress tab. The Edit link is circled.

2. Click the **Edit** link (Figure 1) on the row for the Proposal File Update you want to work on. The **Proposal Update Form Preparation** screen displays (Figure 2) with the proposal as updated. You have these options for editing:
   - View the updated proposal
   - Edit a section (either an original section or an updated section)
   - Edit the Justification Note

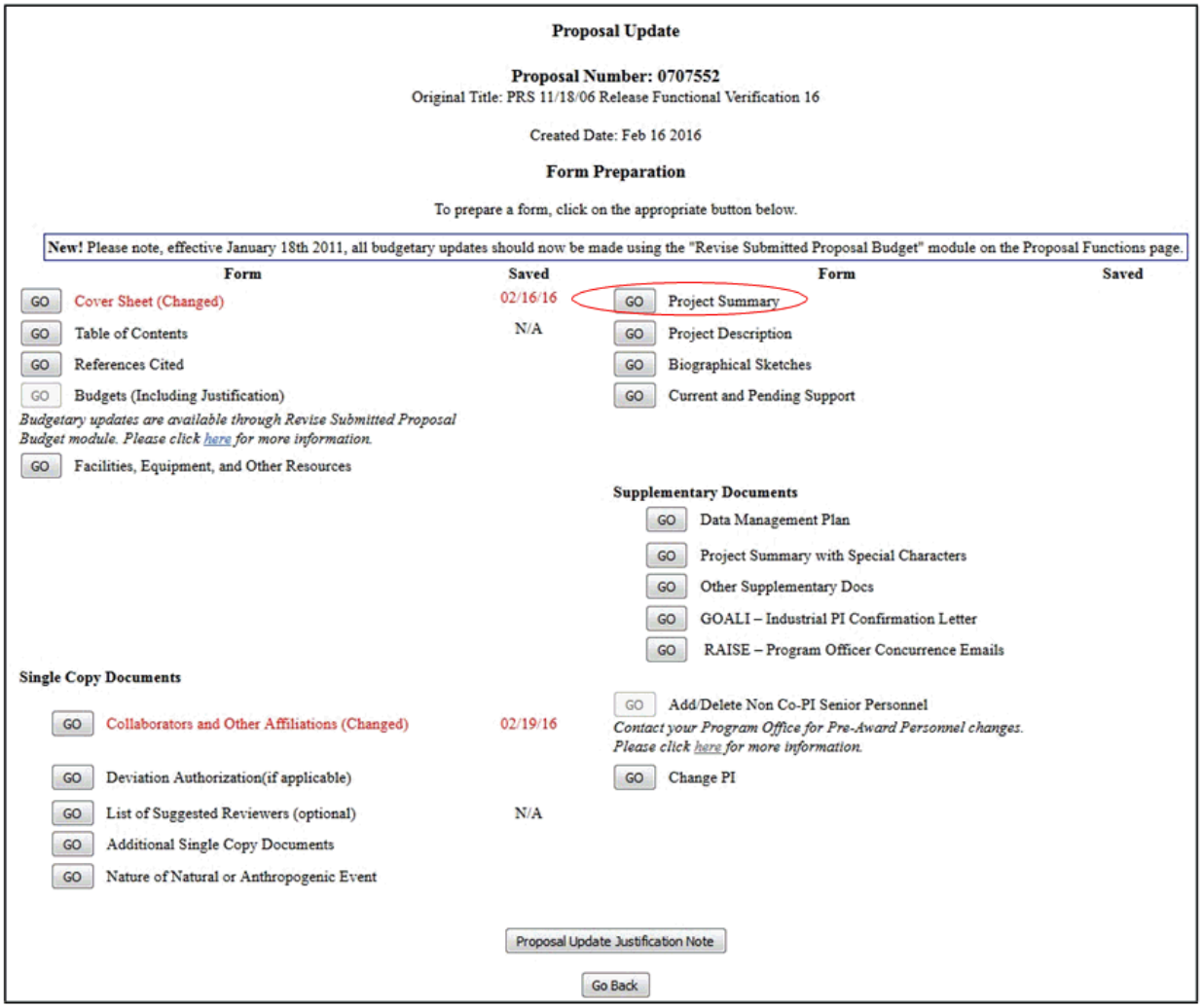


Figure 2 Proposal Update Form Preparation screen. The Go button for the Project Summary is circled.

View the Updated Proposal

1. On the **Proposal Update Form Preparation** screen (Figure 2), click the **Go** button for any section. (The updated sections display in red on the **Proposal Update Form Preparation** screen.) The section displays in PDF format. If you need to download Adobe Reader, see Adobe Reader for FastLane.
2. Click the back button on the browser to return to the **Proposal Update Form Preparation** screen (Figure 2).

Edit a Section

1. Prepare on a word processor the replacement file for the section you want to replace. See Acceptable Formats for FastLane for the formats FastLane accepts.

2. On the **Proposal Change Form Preparation** screen (Figure 2), click the **Go** button for the section you want to replace. The **File Upload** screen displays for the section you selected, as the **Project Summary File Upload** screen displays as an example (Figure 3). (See Prepare Proposal Forms for instructions for a section.)

Figure 3 File Upload screen for the form you want to replace.

3. Upload the new file to replace the original file. See Upload a File for instructions. After you have accepted the upload, the **Proposal Update Form Preparation** screen displays (Figure 4) with the updated section displayed in red with the date of the update.

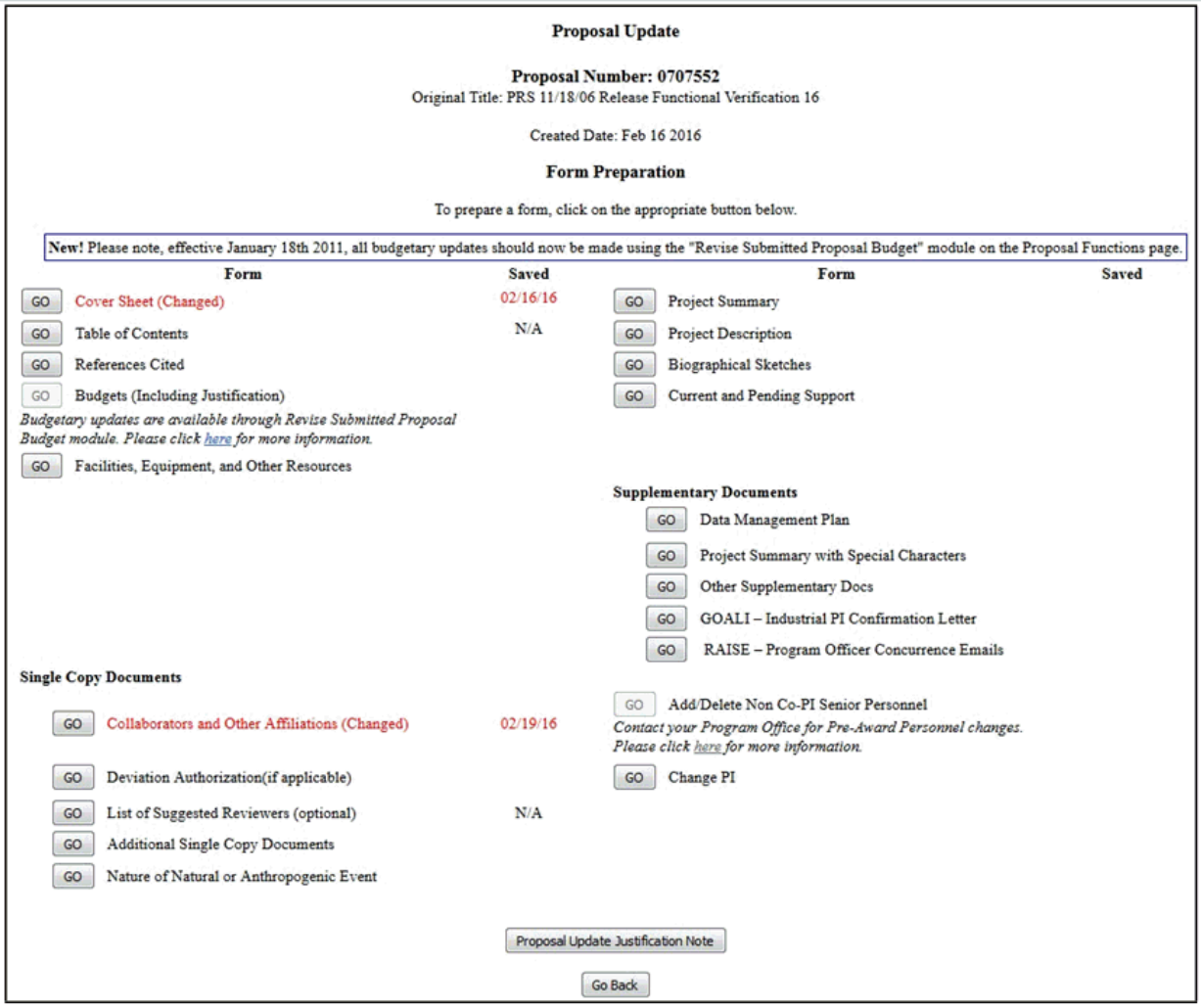


Figure 4 Proposal Update Form Preparation screen with the updated Proposal Summary displayed in red and with the date that the Project Summary was changed.

Edit the Justification Note

1. On the **Proposal Change Form Preparation** screen (Figure 4), click the **Proposal Update Justification Note** button. The **Justification Note** screen displays (Figure 5) with a text box for entering your justification for the Proposal File Update.

Figure 5 Justification Note screen. The OK button is circled.

2. Edit the Justification Note or copy and paste a new Justification in the text box (Figure 5).
3. Click the **OK** button (Figure 5). A screen displays (Figure 6) with the message that the update to the Justification Note is saved.

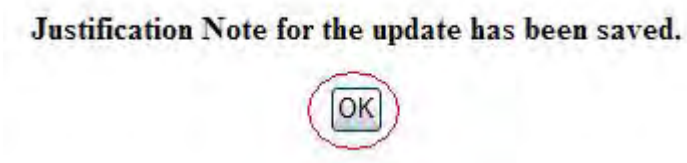


Figure 6 Screen with the message that the update to the Justification Note has been saved. The OK button is circled.

4. Click the **OK** button (Figure 6). The **Proposal Update Form Preparation** screen displays (Figure 4).

Submit a Proposal File Update (AOR Only)

1. Access the **Proposals / Supplements / File Updates / Withdrawals** screen on the **Documents in Progress** tab (Figure 1) (see Work on Forwarded Proposal File Updates).

Figure 1 Proposals/Supplements/File Updates/Withdrawals screen on the Documents in Progress tab. The Submit link is circled.

2. Click **Submit** in the row for the Proposal File Update you want to submit (Figure 1). The **Proposal Warnings** screen displays (Figure 2).

Note: If the Proposal File Update cannot be submitted because a decision has been made on the proposal or because it has passed the update deadline, a message displays telling you that you cannot submit the update.

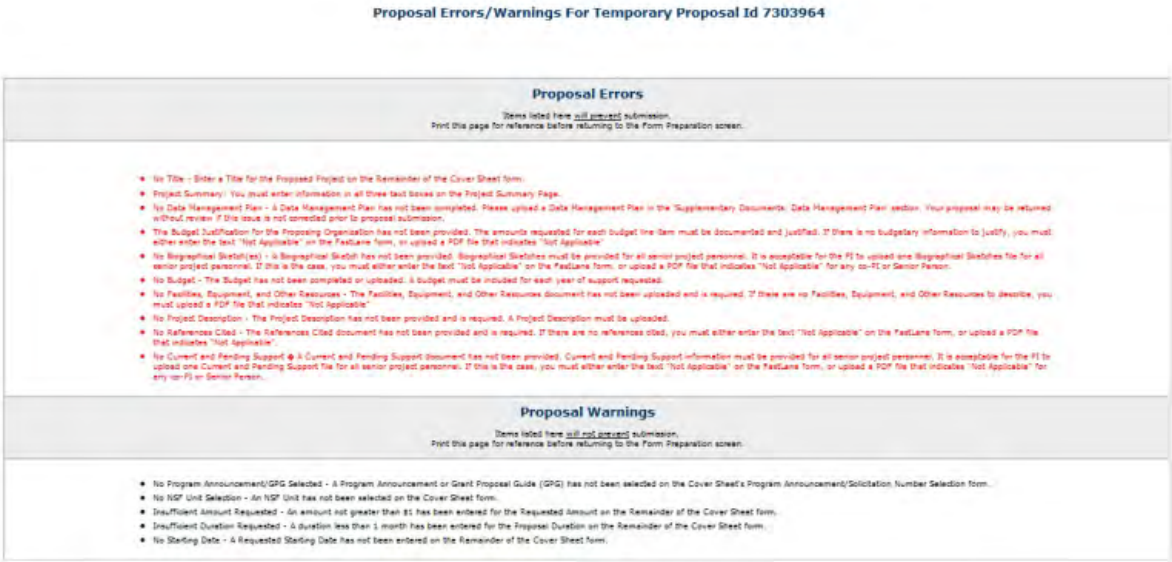
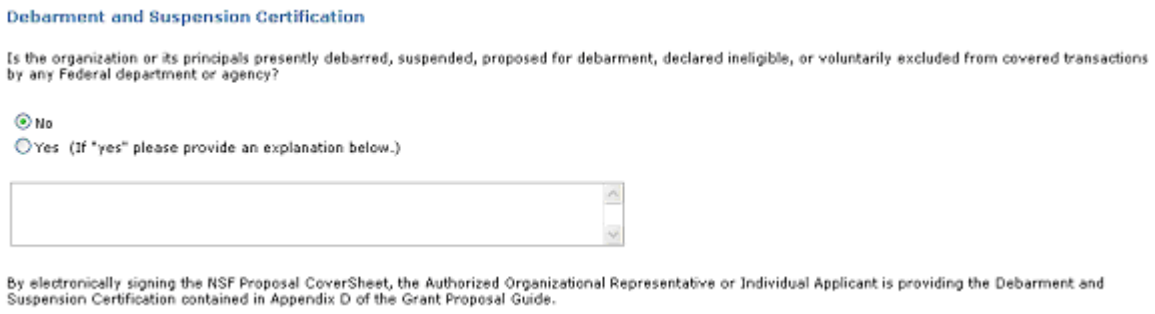


Figure 2 Proposal File Update Errors/Warnings screen.

3. In the **Debarment and Suspension** section of the **Proposal Errors/Warnings** screen (Figure 3), click the radio button for Yes or No if there are any debarments or suspensions of you or of your organization from transactions with federal agencies.



Debarment and Suspension Certification

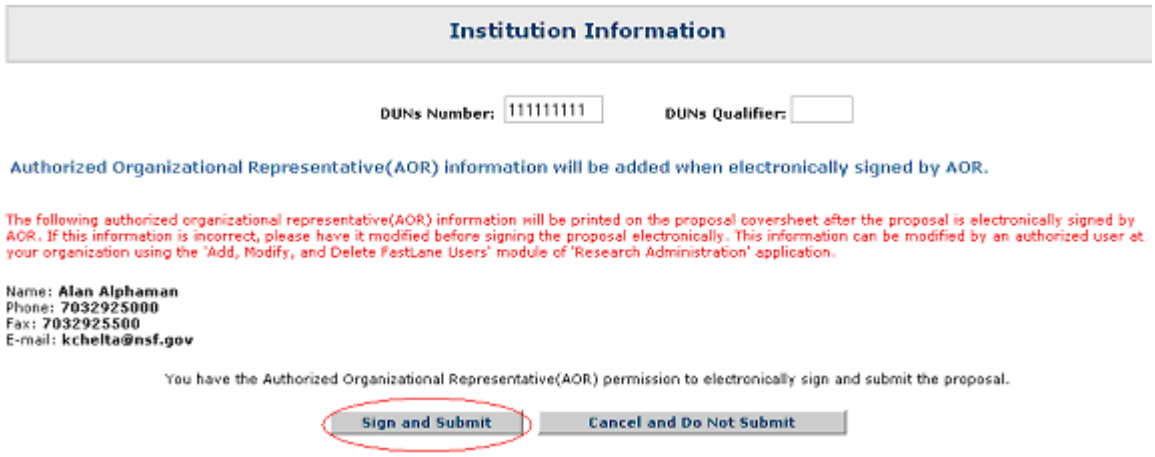
Is the organization or its principals presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any Federal department or agency?

No
Yes (If "yes" please provide an explanation below.)

By electronically signing the NSF Proposal CoverSheet, the Authorized Organizational Representative or Individual Applicant is providing the Debarment and Suspension Certification contained in Appendix D of the Grant Proposal Guide.

Figure 3 Debarment and Suspension Certification section of the Proposal Errors / Warnings screen.

4. *If you answered Yes,* in the text box under the radio buttons (Figure 3), type an explanation.
5. In the **Institution Information** section of the **Proposal Errors / Warnings** screen (Figure 4), check the accuracy of the information for your organization.



Institution Information

DUNs Number: 111111111 DUNs Qualifier:

Authorized Organizational Representative(AOR) information will be added when electronically signed by AOR.

The following authorized organizational representative(AOR) information will be printed on the proposal coversheet after the proposal is electronically signed by AOR. If this information is incorrect, please have it modified before signing the proposal electronically. This information can be modified by an authorized user at your organization using the 'Add, Modify, and Delete FastLane Users' module of 'Research Administration' application.

Name: **Alan Alphaman**
Phone: **7032925000**
Fax: **7032925500**
E-mail: **kchelta@nsf.gov**

You have the Authorized Organizational Representative(AOR) permission to electronically sign and submit the proposal.

Sign and Submit | Cancel and Do Not Submit

Figure 4 Institution Information section of the Proposal Errors / Warnings screen. The Sign and Submit button is circled.

6. At the bottom of the **Proposal Errors / Warnings** screen (Figure 4), click the **Sign and Submit** button. The **Proposal Submission Confirmation** screen displays (Figure 5) with a message that the Proposal File Update has been successfully submitted to NSF.

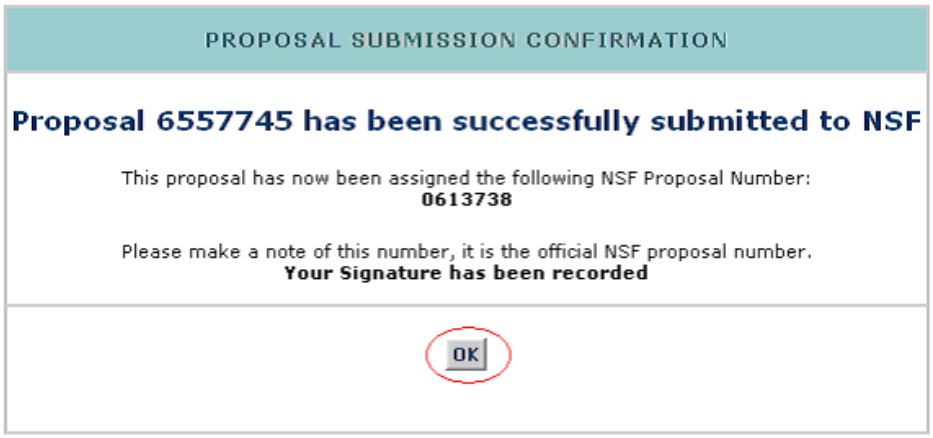


Figure 5 Proposal Submission Confirmation screen with the message that the Proposal File Update has been submitted to NSF.

Return a Proposal File Update to the PI

1. Access the **Proposals / Supplements / File Updates / Withdrawals** screen on the **Documents in Progress** tab (Figure 1) (see Work on Forwarded Proposal File Updates).

Figure 1 Proposals / Supplements / File Updates / Withdrawals screen on the Documents in Progress tab. The Return to PI link is circled.

2. Click **Return to PI** on the row for the update you want to return. A screen displays (Figure 2) with a message for you to confirm that you want to return the update to the PI.

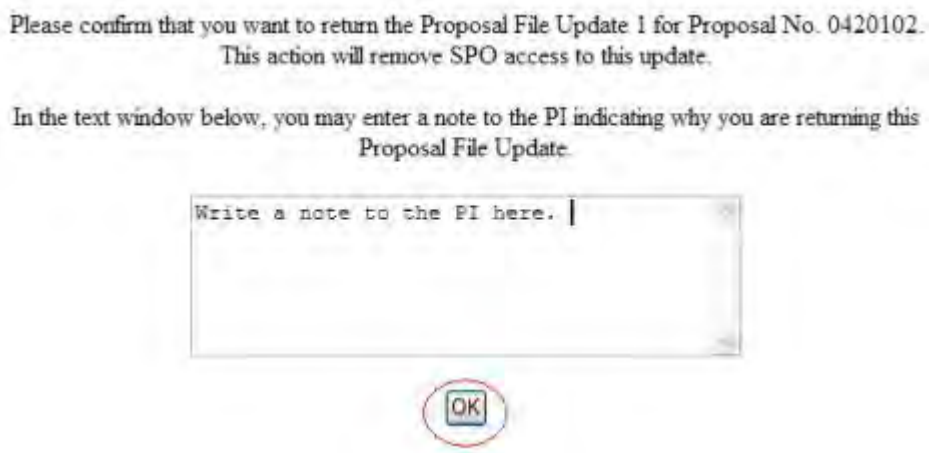


Figure 2 Screen with a message for you to confirm that you want to return the update to the PI with the text box for the note to the PI (optional). The OK button is circled.

3. Type or copy and paste in the text box a note for the PI on why you are returning the update (Figure 2) (optional).
4. Click the **OK** button (Figure 2). A screen displays (Figure 3) with the message that the update has been returned to the PI.

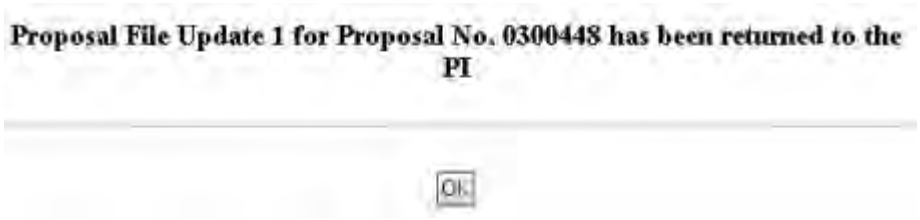


Figure 3 Screen with the message that the update has been returned to the PI.

5. Click the **OK** button (Figure 3). The **Proposals/Supplements/File Updates/Withdrawals** screen displays on the **Documents in Progress** tab (Figure 1).

Work with Submitted Updates

Work with Submitted Proposal File Updates

1. On the **FastLane Home Page** screen, log into Research Administration as an SPO (see SPO/AOR Login). The **Research Administration** screen (Figure 1) displays.

Figure 1 Research Administration screen. The Proposals/Supplements/File Updates/Withdrawals link is circled.

2. Click **Proposals/Supplements/File Updates/Withdrawals** (Figure 1). The **Proposals/Supplements/File Updates/Withdrawals** screen displays on the **Documents in Progress** tab (Figure 2).

Figure 2 Proposals/Supplements/File Updates/Withdrawals screen on the Documents in Progress tab. The Submitted Documents tab is circled.

3. Click the **Submitted Documents** tab (Figure 2). The **Proposals/Supplements/File Updates/Withdrawals** screen displays on the **Submitted Documents** tab (Figure 3).
4. Click the **Type** column header (Figure 3) to group all updates together. You have these options for working on a Proposal File Update that has already been submitted to NSF:
   - View the Update Summary for a submitted Proposal File Update
   - Withdraw a submitted Proposal File Update from NSF consideration (AOR only)

Figure 3 Proposals/Supplements/File Updates/Withdrawals screen on the Submitted Documents tab. The Type column header is circled.

Work with Submitted Proposal File Updates

1. On the **FastLane Home Page** screen, log into Research Administration as an SPO (see SPO/AOR Login). The **Research Administration** screen (Figure 1) displays.

Figure 1 Research Administration screen. The Proposals/Supplements/File Updates/Withdrawals link is circled.

2. Click **Proposals/Supplements/File Updates/Withdrawals** (Figure 1). The **Proposals/Supplements/File Updates/Withdrawals** screen displays on the **Documents in Progress** tab (Figure 2).

Figure 2 Proposals/Supplements/File Updates/Withdrawals screen on the Documents in Progress tab. The Submitted Documents tab is circled.

3. Click the **Submitted Documents** tab (Figure 2). The **Proposals/Supplements/File Updates/Withdrawals** screen displays on the **Submitted Documents** tab (Figure 3).
4. Click the **Type** column header (Figure 3) to group all updates together. You have these options for working on a Proposal File Update that has already been submitted to NSF:
   - View the Update Summary for a submitted Proposal File Update
   - Withdraw a submitted Proposal File Update from NSF consideration (AOR only)

Figure 3 Proposals/Supplements/File Updates/Withdrawals screen on the Submitted Documents tab. The Type column header is circled.

View the Update Summary for a Submitted Proposal File Update

1. Access the **Proposals/Supplements/File Updates/Withdrawals** screen on the **Submitted Documents** tab (Figure 1) (see Work with Submitted Proposal File Updates).

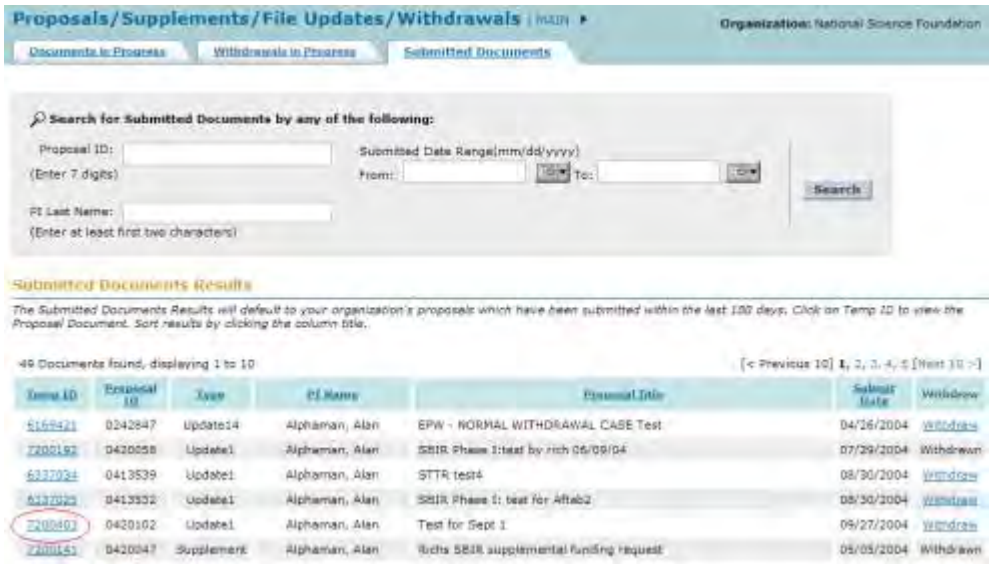


Figure 1 Proposals/Supplements/File Updates/Withdrawals screen on the Submitted Documents tab. The Temp ID number is circled.

2. Click the **Temp ID** number (Figure 1) on the row of the submitted Proposal File Update you want to view. The **Proposal Update Summary** screen displays (Figure 2) with the status of the update. On the **Proposal Update Summary** screen, you have these options:
   - View the initial section, as it was first submitted to NSF
   - View the replacement section, as it was submitted in the Proposal File Update
   - View the Justification Note for the Proposal File Update
   - View/print the updated proposal

Figure 2 Proposal Update Summary screen. The View Initial Section button is circled.

View the Initial Section

1. On the **Proposal Update Summary** screen (Figure 2), in the box listing the updated sections, click the radio button for the section you want to view.
2. Click the **View Initial Section** button (Figure 2). The section displays in PDF format. If you need to download Adobe Reader, see Adobe Reader for FastLane.
3. Click the back button on the browser to return to the **Proposal Update Summary** screen (Figure 2).

View the Replacement Section

1. On the **Proposal Update Summary** screen (Figure 3), click the radio button for the updated section you want to view.

Figure 3 Proposal Update Summary screen. The View Proposed Replacement Section button is circled.

2. Click the **View Proposed Replacement Section** button (Figure 3). The section displays in PDF format. If you need to download Adobe Acrobat, see Adobe Reader for FastLane.
3. Click the back button on the browser to return to the **Proposal Update Summary** screen (Figure 3).

View the Justification Note

1. On the **Proposal Update Summary** screen (Figure 4), click the **View Proposal Update Justification Note** button. The **Justification Note** screen displays (Figure 5).

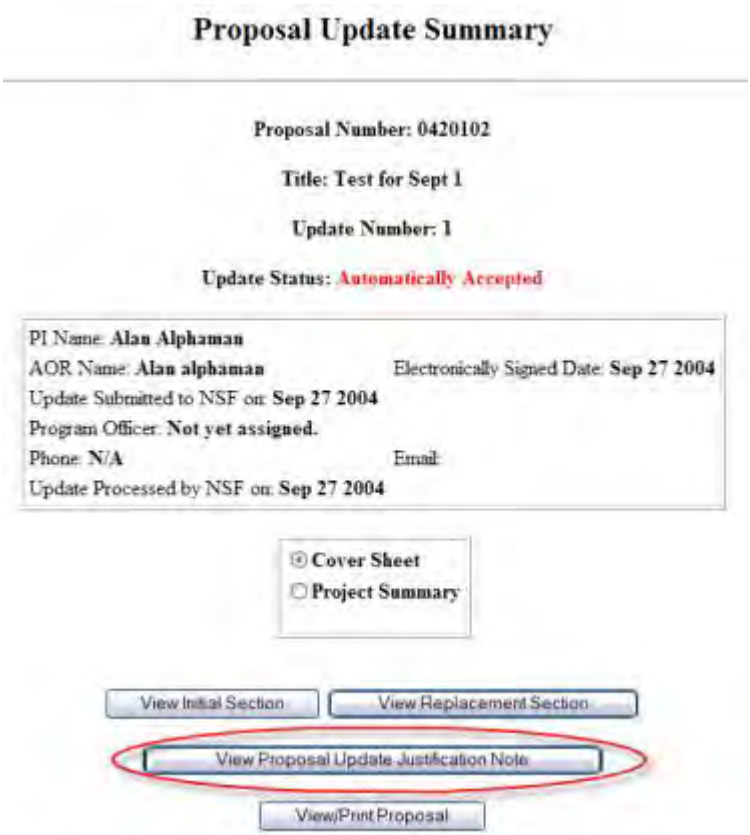


Figure 4 Proposal Update Summary screen. The View Proposal Update Justification Note button is circled.

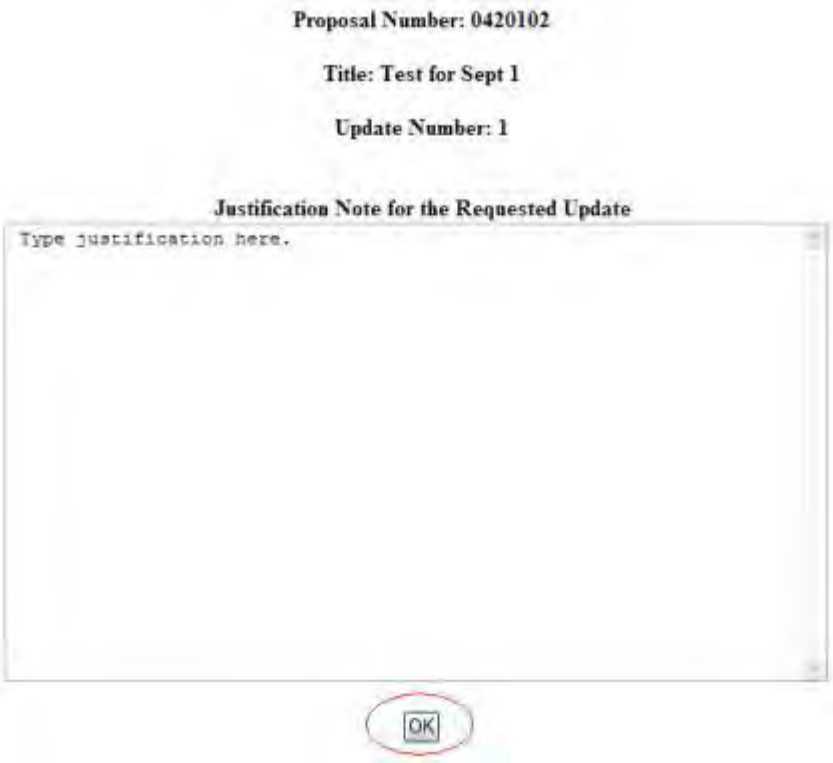


Figure 5 Justification Note screen. The OK button is circled.

2. Click the **OK** button (Figure 5). The **Proposal Update Summary** screen displays (Figure 4).

View and Print an Updated Proposal as an SPO/AOR

1. Access the **Proposal Update Summary** screen (Figure 1) (see View the Update Summary of a Submitted Proposal File Update).

Figure 1 Proposal Update Summary screen. The View / Print Proposal button is circled.

2. Click the **View / Print Proposal** button (Figure 2). The **View Proposal** screen displays (Figure 3).

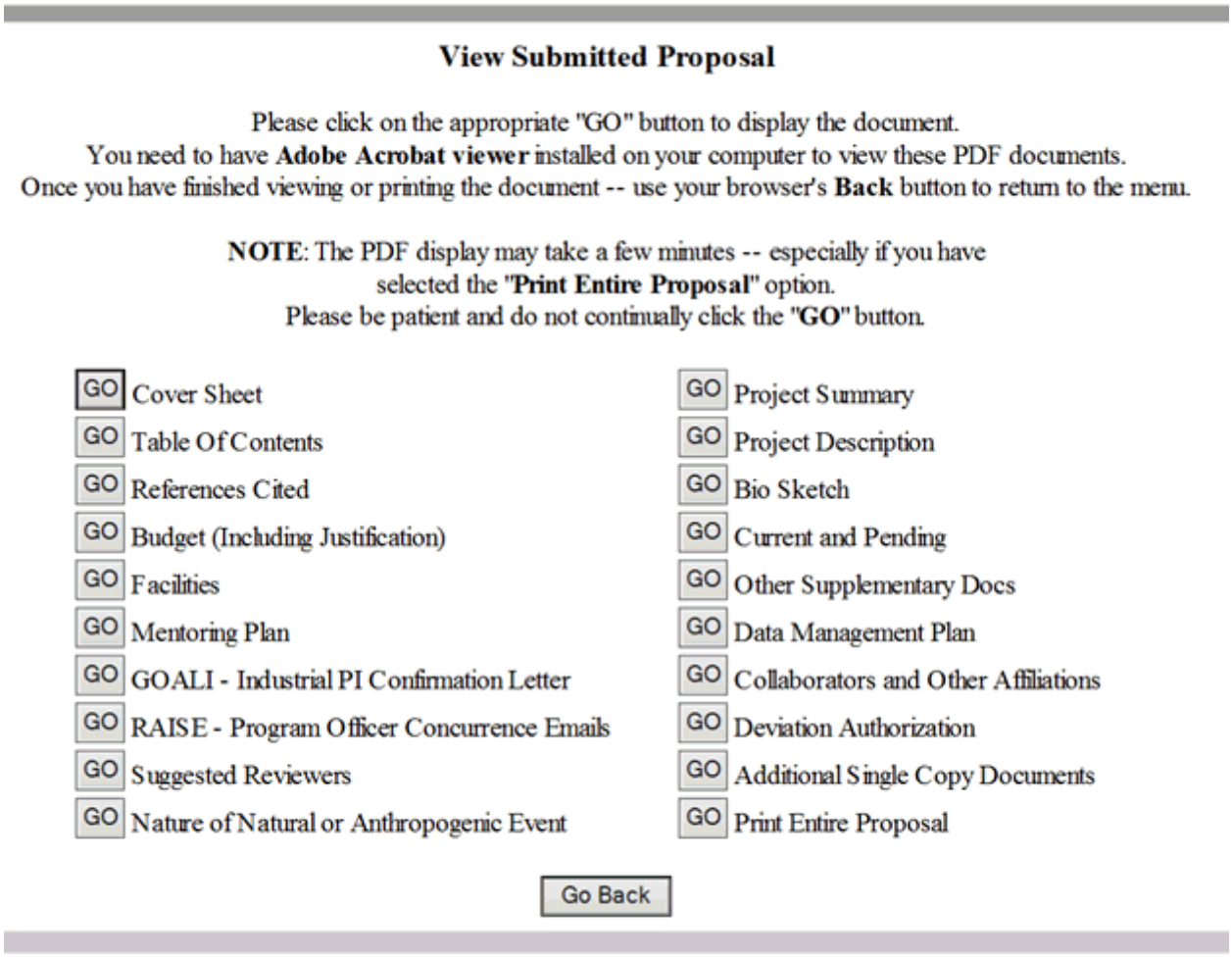


Figure 2 View Proposal screen. The Go button for Print Entire Proposal is circled.

3. Click the **Go** button for any section you want to view. The section displays in PDF format. If you need to download Adobe Acrobat, see Adobe Reader for FastLane.
4. Click the **Print** icon on the Adobe toolbar to print the section.
5. To print the entire proposal, click the **Go** button for Print Entire Proposal (Figure 2). FastLane concatenates the files for the proposal and prints the proposal as one PDF document.

Withdraw a Proposal File Update (AOR Only)

1. Access the **Proposals / Supplements / File Updates / Withdrawals** screen on the **Submitted Documents** tab (Figure 1) (see Work with Submitted Proposal File Updates).

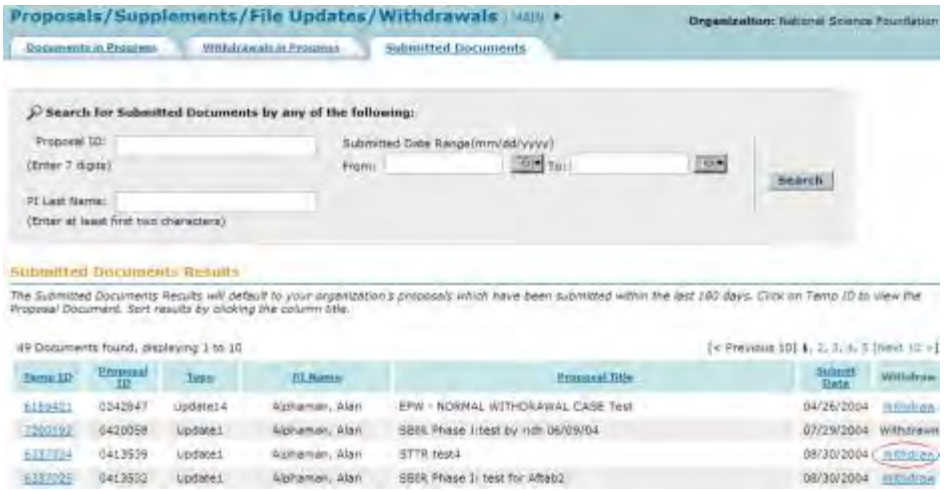


Figure 1 The Proposals/Supplements/File Updates/Withdrawals screen on the Submitted Documents tab. The Withdraw link is circled.

2. Click the **Withdraw** link on the row of the Proposal File Update you wish to withdraw. A screen displays (Figure 2) with a message for you to confirm that you want to remove the update from NSF consideration.

Figure 2 Screen with a message for you to confirm that you want to withdraw the submitted update. The OK button is circled.

3. Click the **OK** button (Figure 2). A screen displays (Figure 3) with the message that the Proposal File Update has been withdrawn.

Figure 3 Screen with the confirmation message that the Proposal File Update has been withdrawn from NSF consideration.

4. Click the **OK** button (Figure 3). The **Proposals/Supplements/File Updates/Withdrawals** screen on the **Submitted Documents** tab displays (Figure 1).

If NSF has already processed the update, you may no longer withdraw it. When you click **Withdraw** on the row for that proposal on the **Submitted Documents** tab of the **Proposals / Supplements / File Updates / Withdrawals** screen, a screen displays (Figure 4) with the message that the update has already been processed.

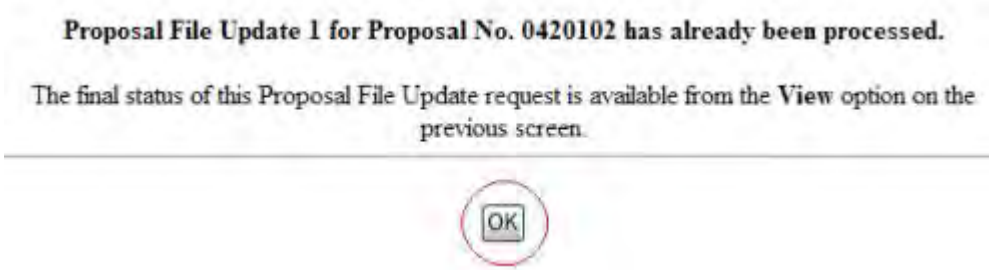


Figure 4 Screen with the message that NSF has already processed the update. The OK button is circled.

Click the **OK** button (Figure 4). The **Proposals / Supplements / File Updates / Withdrawals** screen displays on the **Submitted Documents** tab (Figure 1).

Sign a Proposal File Update

1. On the **FastLane Home Page** screen, log into Research Administration as an Authorized Organizational Representative (see AOR Login). The **Research Administration** screen displays (Figure 1).

Figure 1 Research Administration screen. The Authorized Organizational Representative Functions link is circled.

2. Click **Authorized Organizational Representative Functions**. **The Authorized Organizational Representative Functions** screen displays (Figure 2).

Figure 2 Authorized Organizational Representative Functions screen. The check mark box for the Proposed File Update to sign and the Sign button are circled.

3. Verify that the Signature Information is correct. If you need to change it, click **Account Management** (Figure 2) (see Access Accounts Management, Step 2 for instructions).
4. Click the check mark box in the **Sign** column (Figure 2) on the row for the Proposal File Update that you want to sign.
5. Click the **Sign** button (Figure 2). The **Electronic Signature Notice** screen displays (Figure 3) with the Certification Information for the AOR.

Figure 3 Electronic Signature Notice screen. The Sign button is circled.

Figure 4 Confirmation screen.

6. Click the **Sign** button (Figure 3). The **Confirmation** screen displays (Figure 4) with the message that the Proposed File Update has been signed.
7. Click the **Return to AOR Functions Main** link. The **Authorized Organizational Representative Functions** screen displays (Figure 2).

Check Status of a Proposal

Check Status of a Proposal Introduction

Check the status of a submitted proposal by role:

- As a PI
- As an SPO/AOR

Check Status of a Proposal Introduction

Check the status of a submitted proposal by role:

- As a PI
- As an SPO/AOR

Check Status as PI

Check the Status of a Submitted Proposal as a PI

You can check the status of a submitted proposal.
To check proposal status as an SPO/AOR, see Check the Status of a Submitted Proposal as SPO/AOR.

1. Access the **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management** screen (Figure 1) (see PI/Co-PI Login).

Figure 1 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management screen. The Proposal Functions link is circled.

2. On the **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management** screen (Figure 1), click **Proposal Functions**. The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Proposal Functions** screen displays (Figure 2).

Figure 2 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Proposal Functions screen. The Proposal Status link is circled.

3. Click **Proposal Status** (Figure 2). The **Proposal Status** screen displays (Figure 3) with a listing of proposals for which you are PI or Co-PI in the **All Proposals by Status** section. The proposal status displays in the **Status** column.

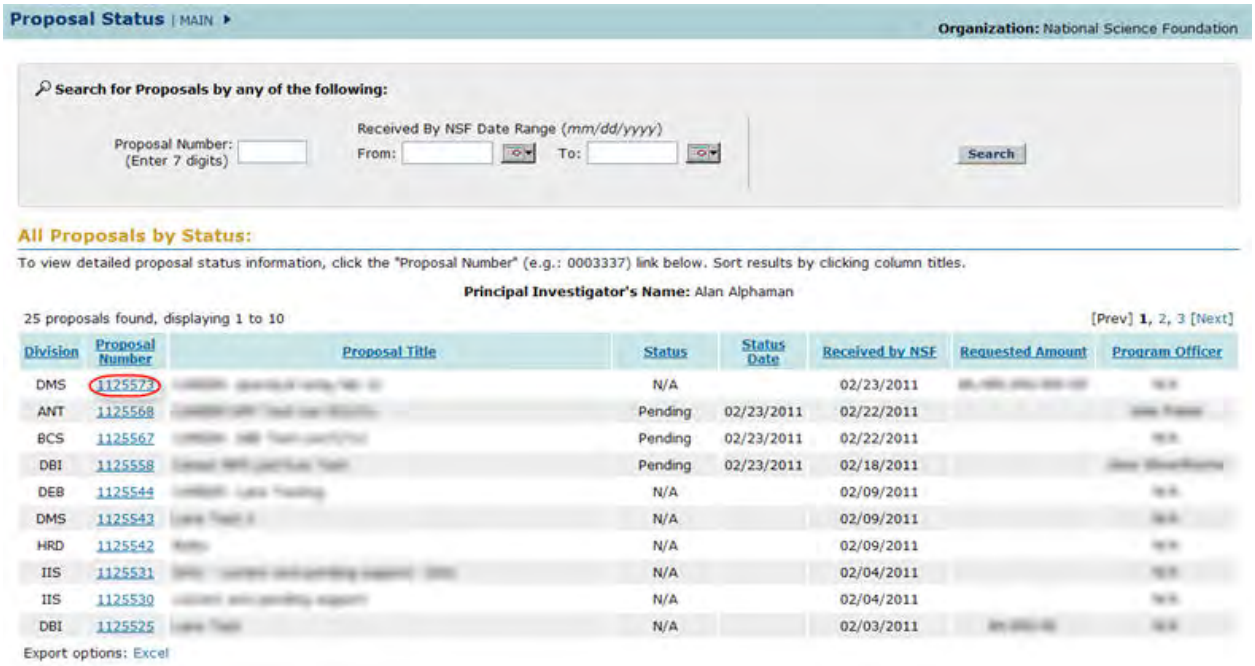


Figure 3 Proposal Status screen. The proposal number is circled for a proposal.

4. Click on the proposal number (Figure 3) on the row for a proposal to see more information on status. The **Proposal Detail** screen displays (Figure 4) with an option to view any reviews or Panel Summary for your proposal (see View the Panel Summary and Reviews of a Proposal for instructions.)

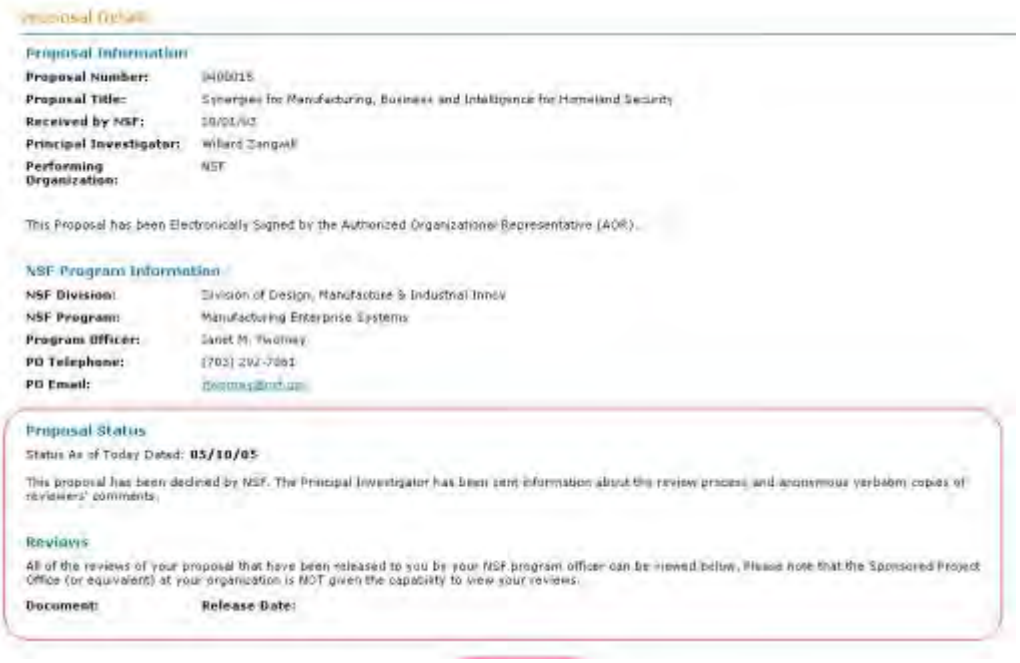


Figure 4 Proposal Detail screen. The Proposal Status and Reviews sections are circled.

If your proposal is for the NSF Biological Sciences division and you submitted a Proposal Classification Form with your proposal, the **Proposal Details** screen displays with an option to View/Print the Proposal Classification Form (Figure 5).
Click **View / Print Proposal Classification Form** (Figure 5). The Proposal Classification Form displays in PDF format. If you need Adobe Reader, see Adobe Reader for FastLane.

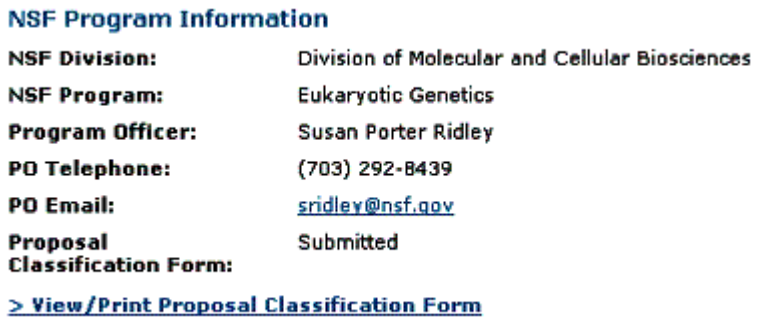


Figure 5 NSF Program Information section of the Proposal Details screen with the link to View / Print Proposal Classification Form.

Check the Status of a Submitted Proposal as a PI

You can check the status of a submitted proposal.
To check proposal status as an SPO/AOR, see Check the Status of a Submitted Proposal as SPO/AOR.

1. Access the **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management** screen (Figure 1) (see PI/Co-PI Login).

Figure 1 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management screen. The Proposal Functions link is circled.

2. On the **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management** screen (Figure 1), click **Proposal Functions**. The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Proposal Functions** screen displays (Figure 2).

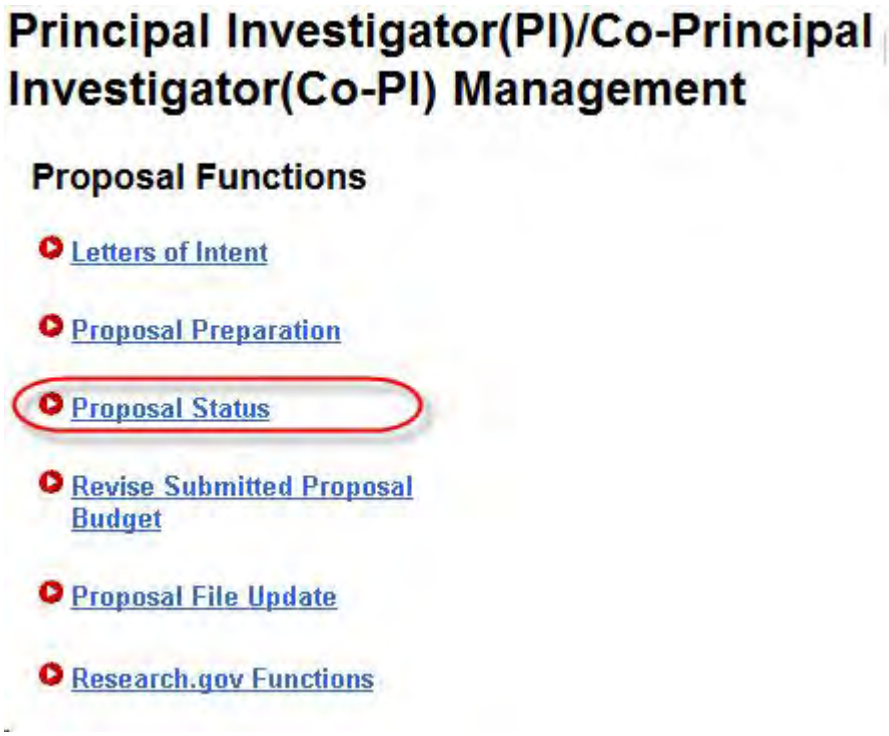


Figure 2 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Proposal Functions screen. The Proposal Status link is circled.

3. Click **Proposal Status** (Figure 2). The **Proposal Status** screen displays (Figure 3) with a listing of proposals for which you are PI or Co-PI in the **All Proposals by Status** section. The proposal status displays in the **Status** column.

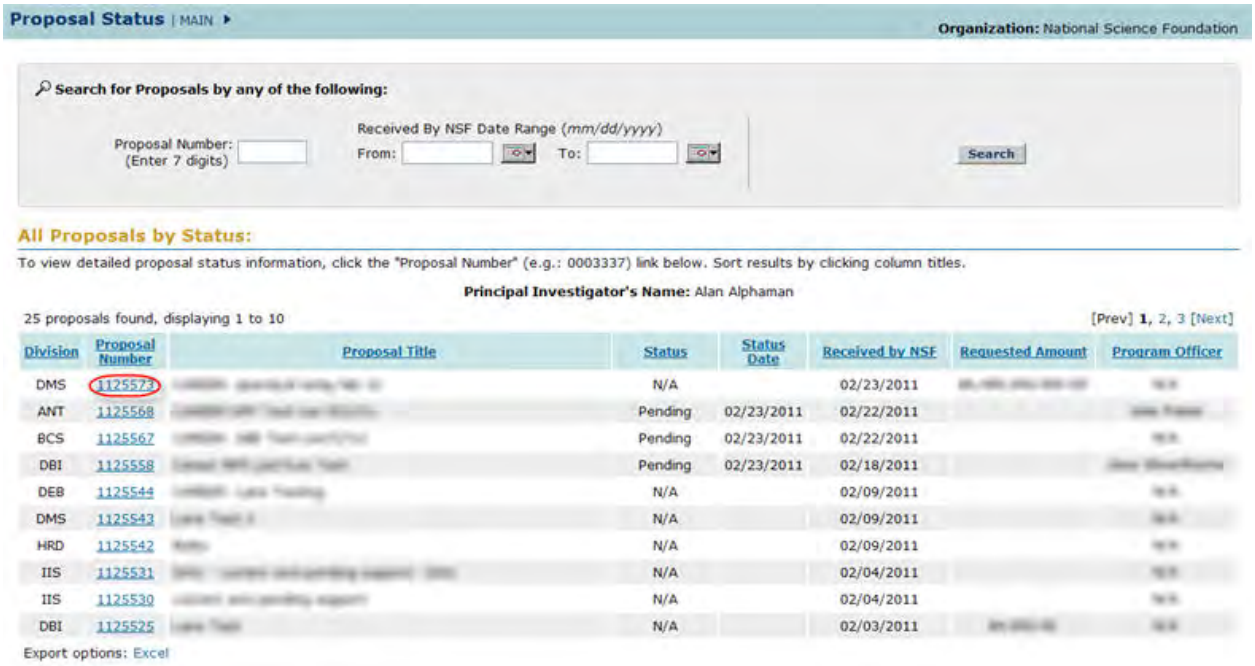


Figure 3 Proposal Status screen. The proposal number is circled for a proposal.

4. Click on the proposal number (Figure 3) on the row for a proposal to see more information on status. The **Proposal Detail** screen displays (Figure 4) with an option to view any reviews or Panel Summary for your proposal (see View the Panel Summary and Reviews of a Proposal for instructions.)

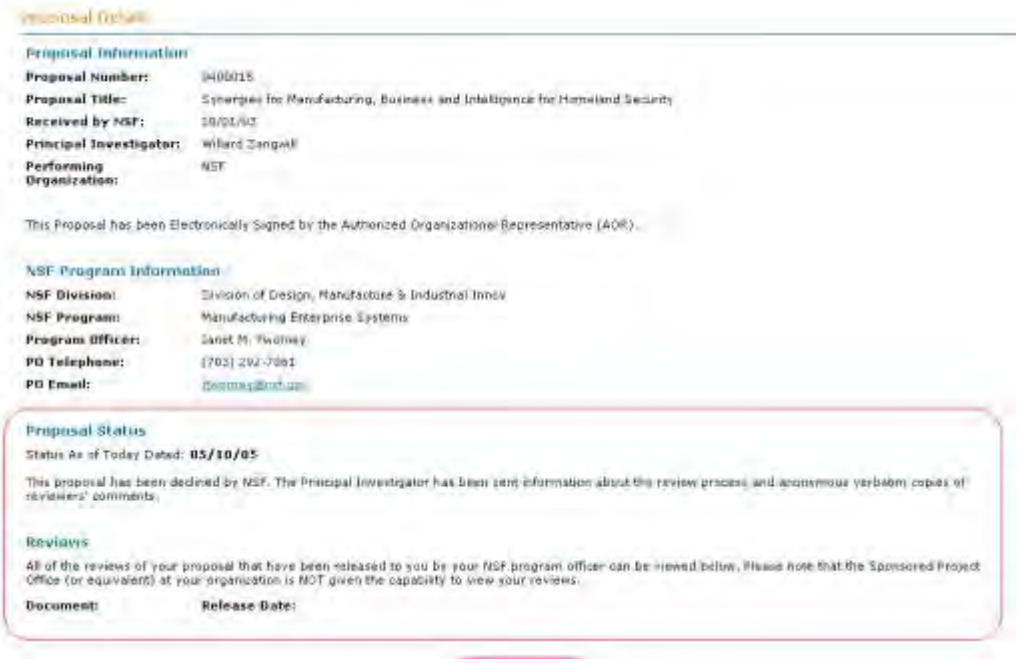


Figure 4 Proposal Detail screen. The Proposal Status and Reviews sections are circled.

If your proposal is for the NSF Biological Sciences division and you submitted a Proposal Classification Form with your proposal, the **Proposal Details** screen displays with an option to View/Print the Proposal Classification Form (Figure 5).
Click **View / Print Proposal Classification Form** (Figure 5). The Proposal Classification Form displays in PDF format. If you need Adobe Reader, see Adobe Reader for FastLane.

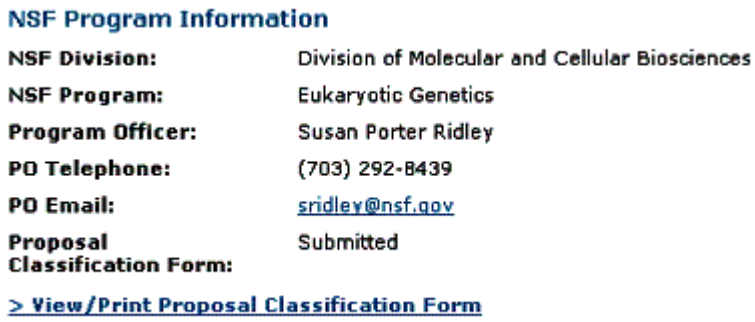


Figure 5 NSF Program Information section of the Proposal Details screen with the link to View / Print Proposal Classification Form.

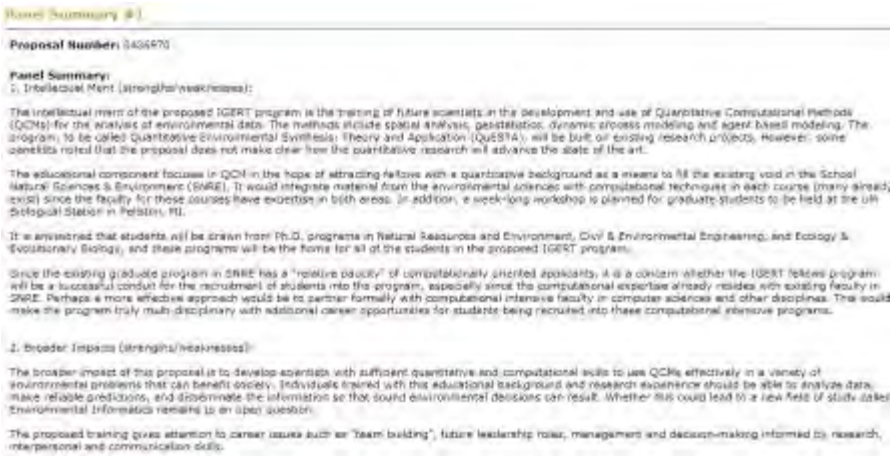
View the Panel Summary and Reviews of a Proposal

1. Access the **Proposal Detail** screen (Figure 1) (see Check the Status of a Submitted Proposal as a PI). If your proposal is in the Review process, the **Review** section of the **Proposal Detail** screen displays a list of reviews and Panel Summary for the proposal.

Figure 1 Proposal Detail screen. The links to the Panel Summary and reviews are circled in the Reviews section.

2. To see the Panel Summary, in the **Review** section, click **Panel Summary** (Figure 2). The **Panel Summary** screen displays (Figure 3) for you to view the Panel Summary.

Figure 2 Reviews section of the Proposal Details screen. The Panel Summary link is circled.



Panel Summary #1

Proposal Number: 0408970

Panel Summary:
1. Intellectual Merit (strengths/weaknesses):

The intellectual merit of the proposed IGERT program is the training of future scientists in the development and use of Quantitative Computational Methods (QCMs) for the analysis of environmental data. The methods include spatial analysis, geostatistics, dynamic process modeling and agent based modeling. The program, to be called Quantitative Environmental Synthesis: Theory and Application (QuESTA), will be built on existing research projects. However, some panelists noted that the proposal does not make clear how the quantitative research will advance the state of the art.

The educational component focuses in QCM in the hope of attracting fellows with a quantitative background as a means to fill the existing void in the School Natural Sciences & Environment (SNRE). It would integrate material from the environmental sciences with computational techniques in each course (many already exist) since the faculty for these courses have expertise in both areas. In addition, a week-long workshop is planned for graduate students to be held at the UM Biological Station in Pellston, MI.

It is envisioned that students will be drawn from Ph.D. programs in Natural Resources and Environment, Civil & Environmental Engineering, and Ecology & Evolutionary Biology, and these programs will be the home for all of the students in the proposed IGERT program.

Since the existing graduate program in SNRE has a "relative paucity" of computationally oriented applicants, it is a concern whether the IGERT fellows program will be a successful conduit for the recruitment of students into the program, especially since the computational expertise already resides with existing faculty in SNRE. Perhaps a more effective approach would be to partner formally with computational intensive faculty in computer sciences and other disciplines. This would make the program truly multi disciplinary with additional career opportunities for students being recruited into these computational intensive programs.

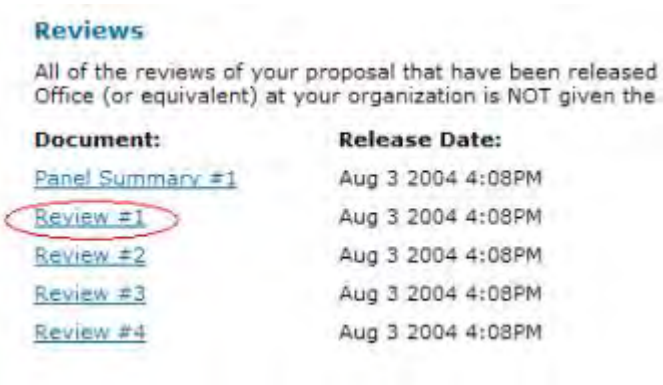
2. Broader Impacts (strengths/weaknesses):

The broader impact of this proposal is to develop scientists with sufficient quantitative and computational skills to use QCMs effectively in a variety of environmental problems that can benefit society. Individuals trained with this educational background and research experience should be able to analyze data, make reliable predictions, and disseminate the information so that sound environmental decisions can result. Whether this could lead to a new field of study dubbed Environmental Informatics remains to an open question.

The proposed training gives attention to career issues such as "team building", future leadership roles, management and decision-making informed by research, interpersonal and communication skills.

Figure 3 Panel Summary screen.

3. To see a review, click a **Review** link (Figure 4). The **Review** screen displays (Figure 5) with one of the reviews of your proposal.



Reviews

All of the reviews of your proposal that have been released
Office (or equivalent) at your organization is NOT given the

Document:	Release Date:
Panel Summary #1	Aug 3 2004 4:08PM
Review #1	Aug 3 2004 4:08PM
Review #2	Aug 3 2004 4:08PM
Review #3	Aug 3 2004 4:08PM
Review #4	Aug 3 2004 4:08PM

Figure 4 Reviews section of the Proposal Details screen. A review link is circled.

Review #1

Proposal Number:	0436970
Performing Organization:	University of Michigan
NSF Program:	Integrative Graduate Education and Research Training Program, IGERT-Preproposal
Principal Investigator:	Currie, William S.
Proposal Title:	IGERT: Quantitative Environmental Synthesis: Theory and Application (QUESTA)
Rating:	Good

REVIEW:

What is the intellectual merit of the proposed activity?

Looking to Quantitative Computational Methods (QCMs) for tools and techniques to address large-scale environmental-science-and-management problems, this proposal envisions the integrated training of graduate students in a "growing convergence of fields and approaches that might broadly be referred to as Environmental Informatics."

What are the broader impacts of the proposed activity?

"A fundamental goal of this IGERT program is to foster the conduct of environmental research that addresses societal needs."

Proposed training gives attention to career issues such as "team building", future leadership roles, management and decision-making informed by research, interpersonal and communication skills.

Among the weaknesses: does not address diversity, international perspective, dissemination with specifics.

Question: How will this project differ from IGERT in Eco-Informatics at Oregon State University.

Summary Statement

The forward-looking research focus is clearly addressed. However, it is difficult to determine whether this is truly a new, integrative model for graduate education or a way to attract students from other environmentally-oriented doctoral programs at the university.

While acknowledging that problems of training "cannot be resolved within the boundaries of traditional, individual academic departments or disciplines," the project draws its faculty collaborators almost exclusively from the School of Natural Resources and Environment. There does not appear to be collaboration with the "mathematical and computational" departments whose techniques are used and whose students could benefit from exposure to SNRE problems. Broader faculty participation and partnerships with "quantitative departments" would strengthen the proposed project.

Figure 5 Review screen with the text of the review for you to view.

Check the Status of a Submitted Proposal as an SPO/AOR

1. On the **FastLane Home Page** screen, log in to Research Administration as an SPO (see SPO/AOR Login). The **Research Administration** screen displays (Figure 1).

Figure 1 Research Administration screen. The Organizational Reports link is circled.

2. Click **Organizational Reports** (Figure 1). The **Organizational Reports** screen displays (Figure 2).

Figure 2 Organizational Reports screen with the radio button for Recent Proposals selected. The Continue button is circled.

3. Click the radio button for Recent Proposals (Figure 2).
4. Click the **Continue** button (Figure 2). The **Recent Proposals** screen displays (Figure 3).

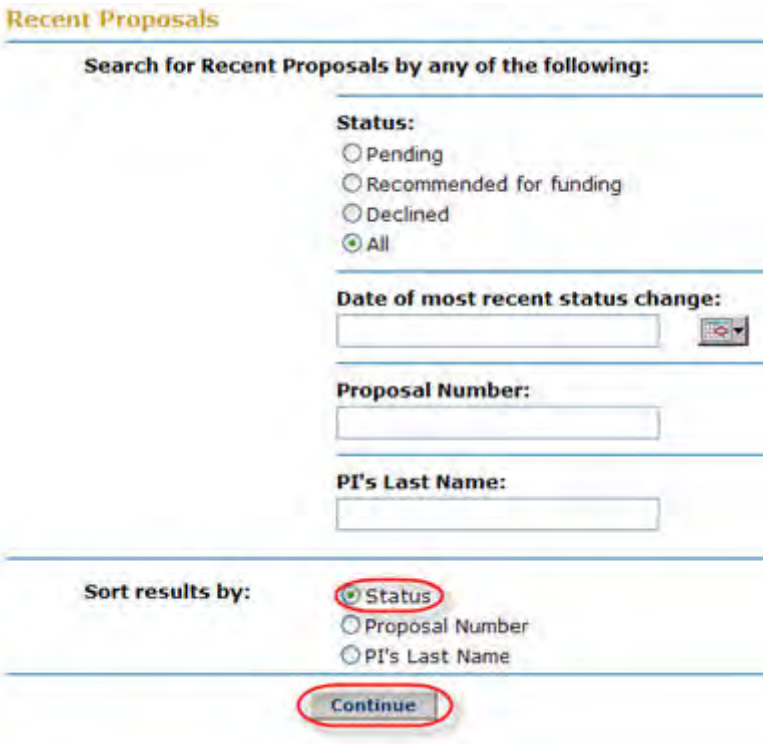


Figure 3 Recent Proposal screen. The radio button for Status and the Continue button are circled.

5. In the **Status** section (Figure 3), click the radio button for All.
6. Add none, one, or any combination of the following search criteria (Figure 3):
   - In the **Date of Most Recent Change** box, type the date of the most recent change in mm/dd/yyyy format.
   - In the **Proposal Number** box, type the number of the proposal you want to check on if it is.
   - In the **PI's Last Name** box, type the PI's last name.
7. In the **Sort Results by** section (Figure 3), click the radio button for Status.
8. Click the **Continue** button (Figure 3). The **Recent Proposals Search Results** screen displays (Figure 4) with the status listed for the proposals matching your search criteria.

Figure 4 Recent Proposal Search Results screen.

View / Print a Submitted Proposal

View and Print a Submitted Proposal Introduction

View and print a submitted proposal by role:

- As a PI
- As an SPO/AOR

View and Print a Submitted Proposal Introduction

View and print a submitted proposal by role:

- As a PI
- As an SPO/AOR

View and Print a Submitted Proposal as a PI

1. On the **FastLane Home Page** screen, log in to Proposals, Awards and Status as a PI (see PI/Co-PI Login). The **Principal Investigator (PI) / Co-Principal Investigator (Co-PI) Management** screen displays (Figure 1).

Figure 1 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management screen. The Proposal Functions link is circled.

2. Click **Proposal Functions** (Figure 1). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Proposal Functions** screen displays (Figure 2).

Figure 2 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Proposal Functions screen. The Proposal Preparation link is circled.

3. Click **Proposal Preparation** (Figure 2). The **Principal Investigator (PI) Information** screen displays (Figure 3).

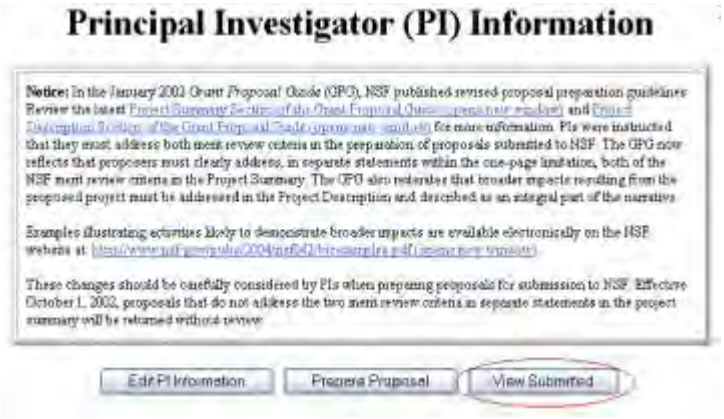


Figure 3 Principal Investigator (PI) Information screen. The View Submitted button is circled.

4. Click the **View Submitted** button (Figure 3). The **Submitted Proposals** screen displays (Figure 4).

Figure 4 Submitted Proposals screen. The View button is circled.

5. Highlight the proposal you want to view in the **Submitted Proposals** list (Figure 4).
6. Click the **View** button (Figure 4). The **View Submitted Proposal** screen displays (Figure 5) with all the section of the submitted proposal. From this screen, you can view the proposal and print the proposal.

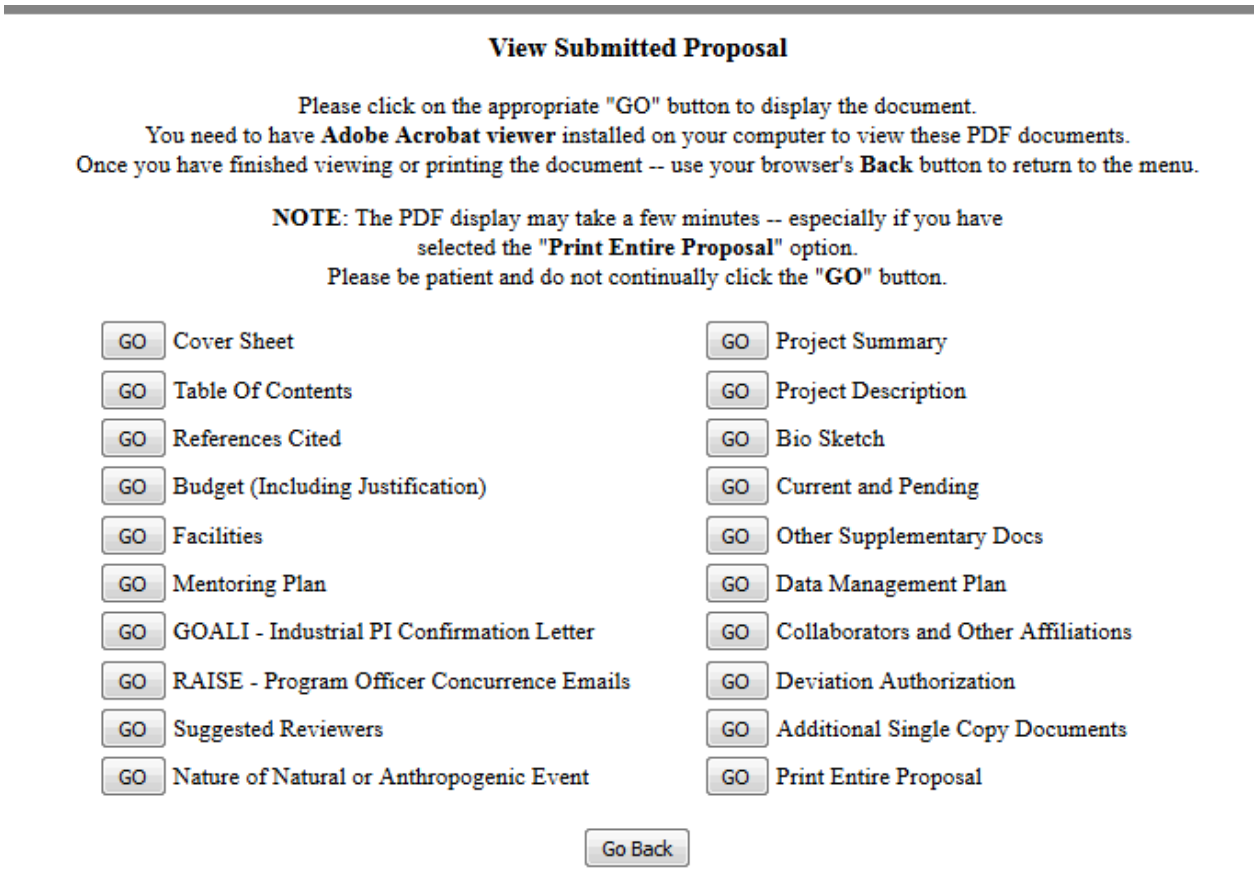


Figure 5 View Submitted Proposal screen.

View a Submitted Proposal

1. On the **View Submitted Proposal** screen (Figure 5), click the **Go** button next to any section to view it. If the section has been uploaded, the section displays in PDF format. If you need to download Adobe Reader, see Adobe Reader for FastLane.
2. Click the back button on the browser of the PDF file to return to the **View Submitted Proposal** screen (Figure 5).

Print a Submitted Proposal

1. On the **View Submitted Proposal** screen (Figure 6), click the **Go** button for Print Entire Proposal. FastLane concatenates the proposal's sections and displays the entire proposal in a single file in PDF format (Figure 7). If you need to download Adobe Reader, see Adobe Reader for FastLane.

Print Menu

Please click on the appropriate "GO" button to display the document.
You need to have **Adobe Acrobat viewer** installed on your computer to view these PDF documents.
Once you have finished viewing or printing the document -- use your browser's **Back** button to return to the menu.

NOTE: The PDF display may take a few minutes -- especially if you have selected the "**Print Entire Proposal**" option.
Please be patient and do not continually click the "**GO**" button.

GO Cover Sheet	GO Project Summary
GO Table Of Contents	GO Project Description
GO References Cited	GO Bio Sketch
GO Budget (Including Justification)	GO Current and Pending
GO Facilities	GO Other Supplementary Docs
GO Mentoring Plan	GO Data Management Plan
GO GOALI - Industrial PI Confirmation Letter	GO Collaborators and Other Affiliations
GO RAISE - Program Officer Concurrence Emails	GO Deviation Authorization
GO Suggested Reviewers	GO Additional Single Copy Documents
GO Nature of Natural or Anthropogenic Event	GO Print Entire Proposal

Go Back

Figure 6 View Submitted Proposals screen. The Print Entire Proposal button is circled.

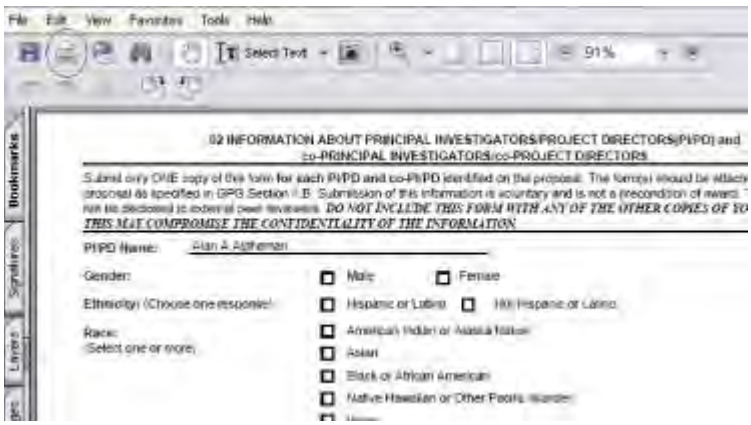


Figure 7 PDF format display of the submitted proposal. The Print icon is circled.

2. Click the **Print** icon on the PDF screen (Figure 7). The document prints.
3. Click the back button on the PDF screen to return to the **View Submitted Proposals** screen (Figure 6).

View and Print a Submitted Proposal as an SPO/AOR

1. On the **FastLane Home Page** screen, log in as an SPO to Research Administration (see SPO/AOR Login). The **Research Administration** screen displays (Figure 1).

Figure 1 Research Administration screen. The Proposals/Supplements/File Updates/Withdrawals link is circled.

2. Click **Proposals/Supplements/ File Updates/Withdrawals** (Figure 1). The **Proposals/Supplements/File Updates/Withdrawals** screen displays on the **Documents in Progress** tab (Figure 2).

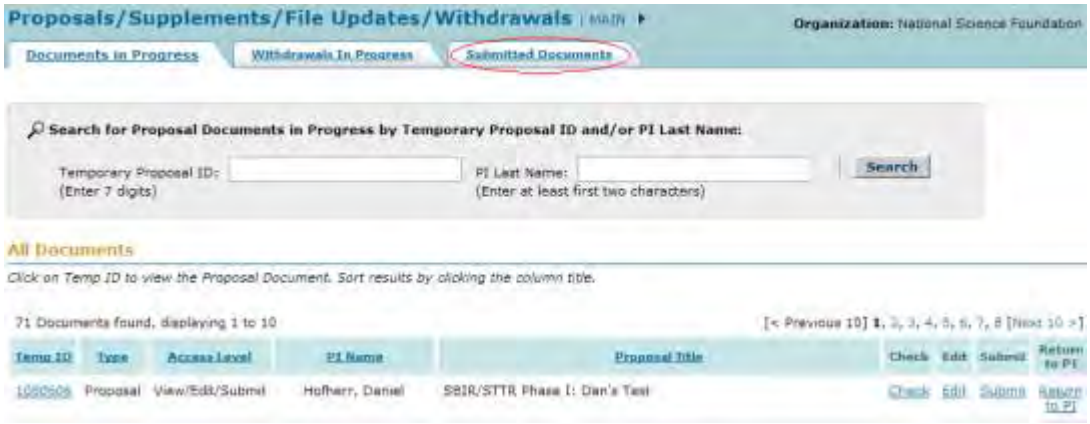


Figure 2 Proposals/Withdrawals/File Updates/Withdrawals screen on the Documents in Progress tab. The Submitted Documents tab is circled.

3. Click the **Submitted Documents** tab (Figure 2). The **Proposals / Withdrawals / File Updates / Withdrawals** screen on the **Submitted Documents** tab displays (Figure 3) with a listing of the documents your organization has submitted to NSF.

Figure 3 Proposals / Supplements / File Updates / Withdrawals screen on the Submitted Documents tab. The Temp ID number is circled.

4. Click the Temp ID number (Figure 3) in the row of the proposal you want to view. The **View Submitted Proposal** screen displays (Figure 4) with all the sections for that proposal. From this screen, you can view the proposal and print the proposal.

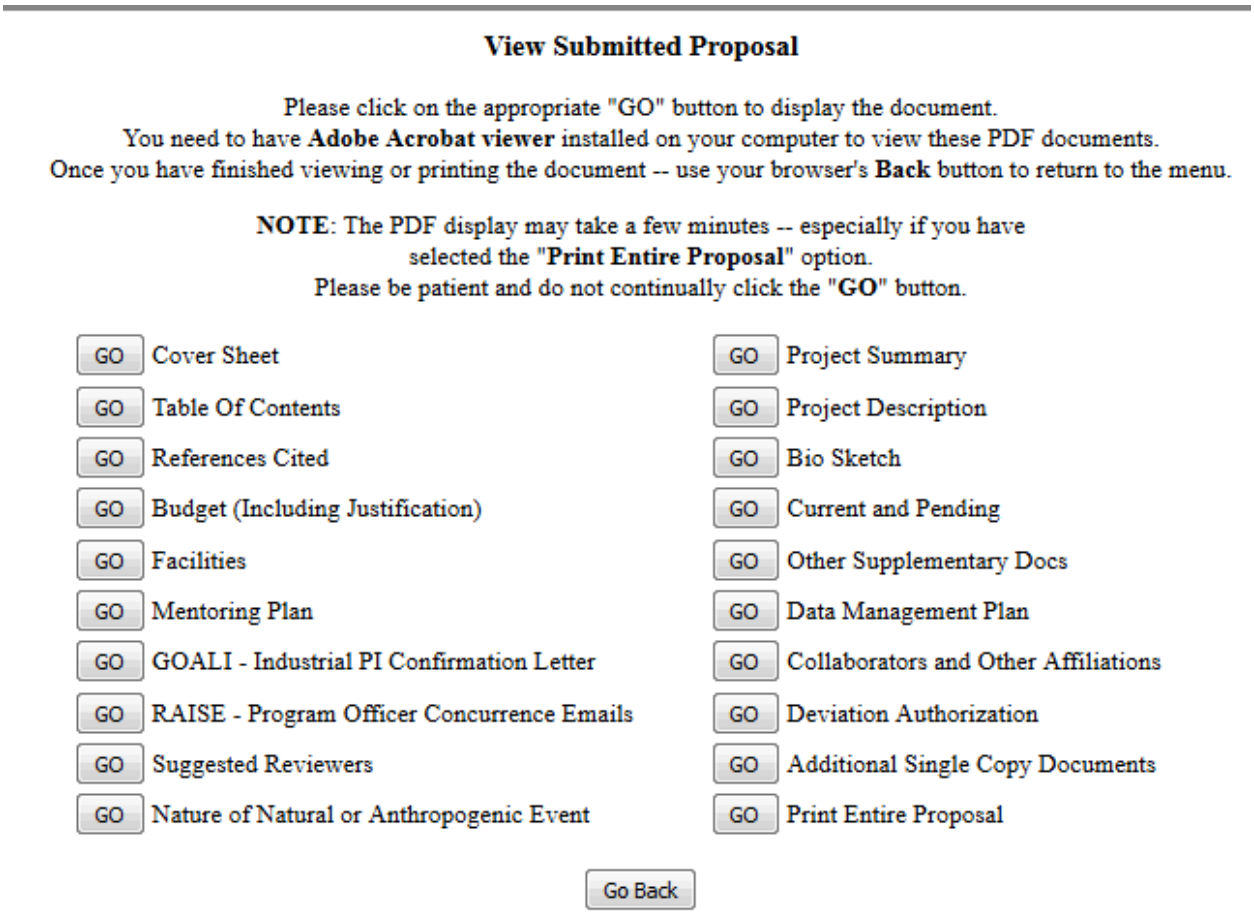


Figure 4 View Submitted Proposal screen for the proposal you selected to view.

View a Submitted Proposal

1. On the **View Submitted Proposal** screen (Figure 4), click the **Go** button next to any section to view it. If the section has been uploaded, the section displays in PDF format. If you need to download Adobe Reader, see Adobe Reader for FastLane.
2. Click the back button on the browser of the PDF file to return to the **View Submitted Proposal** screen (Figure 4).

section

Print a Submitted Proposal

1. On the **View Submitted Proposal** screen (Figure 5), click the **Go** button for Print Entire Proposal (Figure 5). FastLane concatenates the proposal's sections and displays the entire proposal in a single file in PDF format (Figure 6). If you need to download Adobe Reader, see Adobe Reader for FastLane.

Print Menu

Please click on the appropriate "GO" button to display the document.
You need to have **Adobe Acrobat viewer** installed on your computer to view these PDF documents.
Once you have finished viewing or printing the document -- use your browser's **Back** button to return to the menu.

NOTE: The PDF display may take a few minutes -- especially if you have selected the "**Print Entire Proposal**" option.
Please be patient and do not continually click the "**GO**" button.

GO Cover Sheet	GO Project Summary
GO Table Of Contents	GO Project Description
GO References Cited	GO Bio Sketch
GO Budget (Including Justification)	GO Current and Pending
GO Facilities	GO Other Supplementary Docs
GO Mentoring Plan	GO Data Management Plan
GO GOALI - Industrial PI Confirmation Letter	GO Collaborators and Other Affiliations
GO RAISE - Program Officer Concurrence Emails	GO Deviation Authorization
GO Suggested Reviewers	GO Additional Single Copy Documents
GO Nature of Natural or Anthropogenic Event	GO Print Entire Proposal

Go Back

Figure 5 View Submitted Proposals screen. The Go button for Print Entire Proposal is circled.

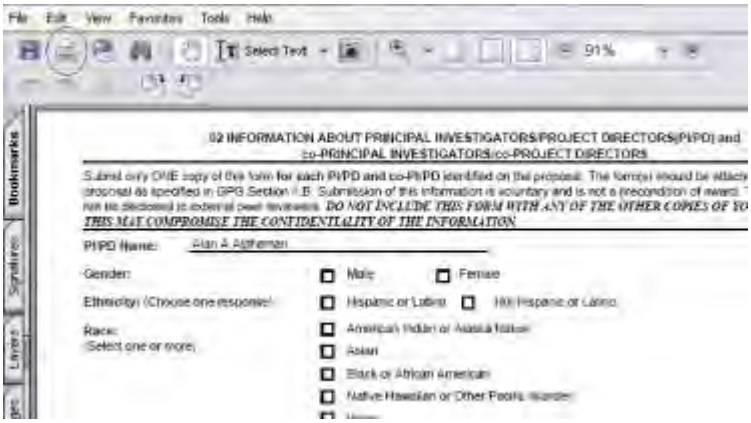


Figure 6 PDF format display of the submitted proposal. The Print icon is circled.

2. Click the **Print** icon on the PDF screen (Figure 6). The document prints.
3. Click the back button on the browser of the PDF file to return to the **View Submitted Proposals** screen (Figure 5).

Revise a Submitted Proposal Budget

Revise a Submitted Proposal Budget

Print the contents of the Revise a Submitted Proposal Budget book.

In the process of making an award recommendation for a proposal, the cognizant NSF Program Officer may ask you to submit a Revised Proposal Budget for the proposed project. You can revise a Proposal Budget in this module.

If you are reducing the proposal budget by more than 10%, you *must* submit a Budget Impact Statement with the Revised Proposal Budget.

If you are reducing the proposal budget by less than 10%, you may still submit a Budget Impact Statement, but NSF does not require it.

Note: If an NSF Program Officer has not asked you to submit a Revised Budget but you need to correct a submitted budget, use the Proposal File Update module to correct the submitted budget.

Roles in Revising a Submitted Proposal Budget

The Principal Investigator (PI) *initiates* the revised submitted budget and forwards the revised budget to the Sponsored Project Office (SPO).

The AOR *submits* the revised budget to NSF.

As a PI, you can:
- Access the Proposal Revised Budget screen
- View a budget
- Edit a submitted budget
- Prepare a Budget Impact Statement
- Refresh to the last submitted budget
- Assign a PIN to a Revised Proposal Budget
- Forward a Revised Proposal Budget to the SPO
- Add/delete Senior Personnel

As an SPO, you can do the following:
- View and print a revised budget forwarded by a PI
- Edit a Revised Proposal Budget
- Prepare a Budget Impact Statement
- Refresh to the last submitted budget
- View and print a revised budget that has been submitted to NSF

As an AOR, you can do all of the above and the following:
- Submit a revised budget to NSF

Click on a link above for instructions for that action.

Revise a Submitted Proposal Budget

Print the contents of the Revise a Submitted Proposal Budget book.

In the process of making an award recommendation for a proposal, the cognizant NSF Program Officer may ask you to submit a Revised Proposal Budget for the proposed project. You can revise a Proposal Budget in this module.

If you are reducing the proposal budget by more than 10%, you *must* submit a Budget Impact Statement with the Revised Proposal Budget.

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Note: If an NSF Program Officer has not asked you to submit a Revised Budget but you need to correct a submitted budget, use the Proposal File Update module to correct the submitted budget.

Roles in Revising a Submitted Proposal Budget

The Principal Investigator (PI) *initiates* the revised submitted budget and forwards the revised budget to the Sponsored Project Office (SPO).

The AOR *submits* the revised budget to NSF.

As a PI, you can:
- Access the Proposal Revised Budget screen
- View a budget
- Edit a submitted budget
- Prepare a Budget Impact Statement
- Refresh to the last submitted budget
- Assign a PIN to a Revised Proposal Budget
- Forward a Revised Proposal Budget to the SPO
- Add/delete Senior Personnel

As an SPO, you can do the following:
- View and print a revised budget forwarded by a PI
- Edit a Revised Proposal Budget
- Prepare a Budget Impact Statement
- Refresh to the last submitted budget
- View and print a revised budget that has been submitted to NSF

As an AOR, you can do all of the above and the following:
- Submit a revised budget to NSF

Click on a link above for instructions for that action.

PI Functions

Access the Proposal Revised Budget Screen

1. On the **FastLane Home Page** screen, log in as a PI to Proposals, Awards, and Status (see PI/Co-PI Login). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management** screen displays (Figure 1).

Figure 1 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management screen. The Proposal Functions link is circled.

2. Click **Proposal Functions** (Figure 1). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Proposal Functions** screen displays (Figure 2).

Figure 2 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Proposal Functions screen. The Revise Submitted Proposal Budget link is circled.

3. Click **Revise Submitted Proposal Budget** (Figure 2). The **List of Proposals** screen displays (Figure 3) with the list of your organization's proposals.

Figure 3 List of Proposals screen. The View button is circled.

4. Highlight the proposal whose budget you want to revise from the **List of Proposals** (Figure 3).
5. Click the **View** button (Figure 3). The **Proposal Revised Budget** screen displays (Figure 4) with the following options:
   - View the budget
   - Edit the budget
   - Refresh to the last submitted budget
   - Assign a PIN to the Revised Proposal Budget
   - Forward a Revised Proposal Budget to the Sponsored Project Office (SPO)
   - Add/Delete Senior Personnel

   (Click on a link above for instructions for that action.)

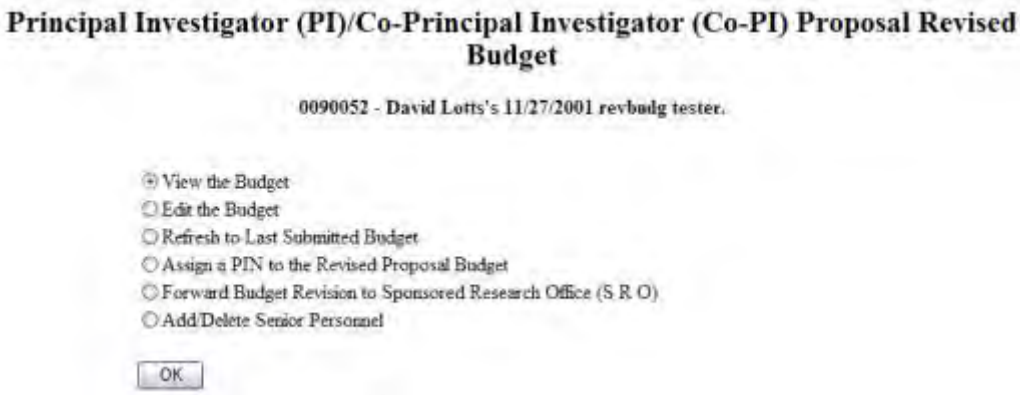


Figure 4 Proposal Revised Budget screen.

Access the Proposal Revised Budget Screen

1. On the **FastLane Home Page** screen, log in as a PI to Proposals, Awards, and Status (see PI/Co-PI Login). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Managemen**t screen displays (Figure 1).

Figure 1 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management screen. The Proposal Functions link is circled.

2. Click **Proposal Functions** (Figure 1). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Proposal Functions** screen displays (Figure 2).

Figure 2 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Proposal Functions screen. The Revise Submitted Proposal Budget link is circled.

3. Click **Revise Submitted Proposal Budget** (Figure 2). The **List of Proposals** screen displays (Figure 3) with the list of your organization's proposals.

Figure 3 List of Proposals screen. The View button is circled.

4. Highlight the proposal whose budget you want to revise from the **List of Proposals** (Figure 3).
5. Click the **View** button (Figure 3). The **Proposal Revised Budget** screen displays (Figure 4) with the following options:

- View the budget
- Edit the budget
- Refresh to the last submitted budget
- Assign a PIN to the Revised Proposal Budget
- Forward a Revised Proposal Budget to the Sponsored Project Office (SPO)
- Add/Delete Senior Personnel

(Click on a link above for instructions for that action.)

Figure 4 Proposal Revised Budget screen.

View the Budget

1. Access the **Proposal Revised Budget** screen (Figure 1) (see Access the Proposal Revised Budget Screen).

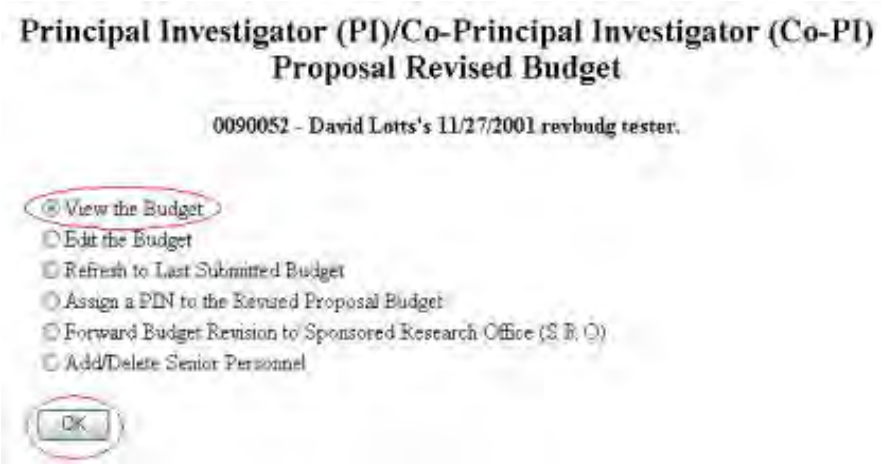


Figure 1 Proposal Revised Budget screen. The radio button for View the Budget and the OK button are circled.

2. On the **Proposal Revised Budget** screen (Figure 1), click the radio button for View the Budget.

3. Click the **OK** button (Figure 1). The **View / Print Revised Budget(s)** screen displays (Figure 2).

Figure 2 View / Print Revised Budget(s) screen. The View / Print button is circled.

4. Highlight the budget that you want to view from the **Revision Number** list (Figure 2).
5. Click the **View / Print** button (Figure 2). The budget you selected displays (Figure 3) in PDF format. If you need to download Adobe Reader, see Adobe Reader for FastLane.

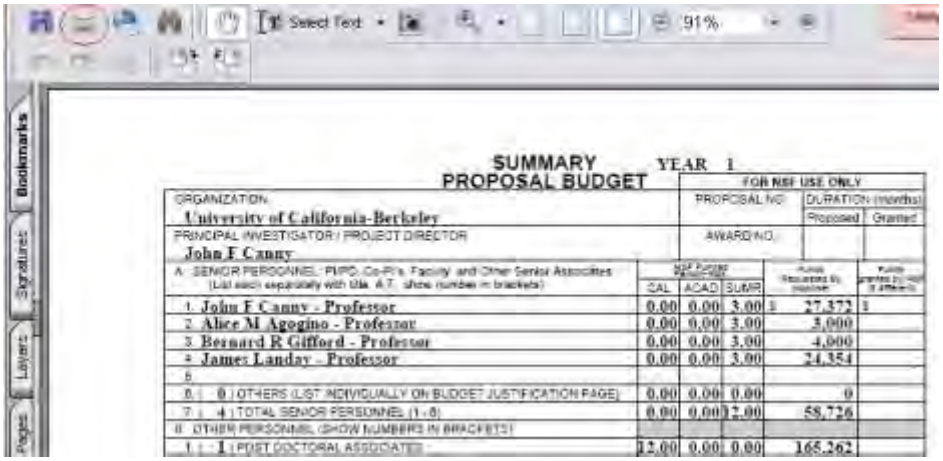


Figure 3 Budget displayed in PDF format. The Print icon is circled.

5. To print the displayed budget, click the **Printer** icon (Figure 3) on the **Budget** display screen. The budget prints.
6. Click the browser back button to return to the **View / Print Revised Budget(s)** screen (Figure 2).

Edit the Submitted Budget

1. Access the **Proposal Revised Budget** screen (Figure 1) (see Access the Proposal Revised Budget Screen).

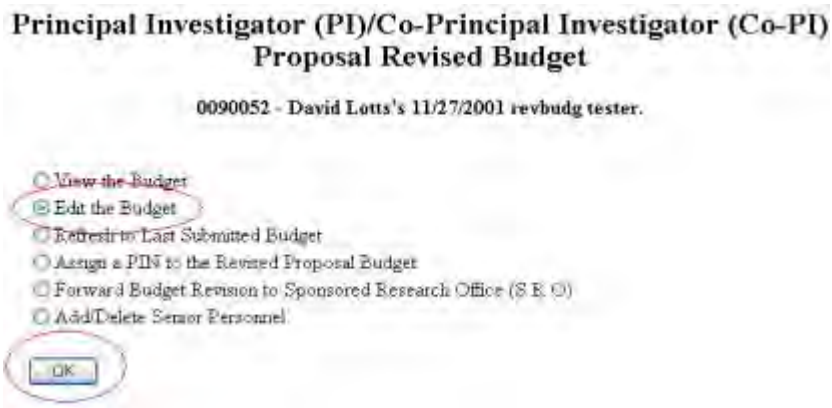


Figure 1 Proposal Revised Budget screen. The radio button for Edit the Budget and the OK button are circled.

2. Click the radio button for **Edit the Budget** (Figure 1).
3. Click the **OK** button (Figure 1). The **Project Budget** screen displays (Figure 2). For instructions for editing any budget year, see Budgets (Including Justification) and Enter the Budget Data Online.

Figure 2 Project Budget screen.

Once you have calculated and saved the edited budget, it is listed as the Working Budget on the **View / Print Revised Budget(s)** screen (Figure 3).

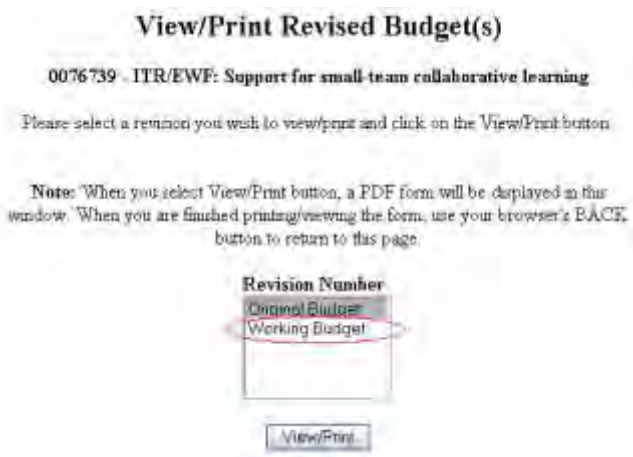


Figure 3 View / Print Revised Budget(s) screen with the new Revised Proposal Budget now listed as the Working Budget (circled).

Prepare a Budget Impact Statement

I*f you are reducing the budget by more than 10%*, you must submit a Budget Impact Statement with the revised budget.

1. Access the **Project Budget** screen (Figure 1) (see Edit the Budget, Step 1 through Step 3).

Figure 1 Project Budget screen. The Budget Impact Statement link is circled.

2. Click **Budget Impact Statement** (Figure 1). The **Budget Impact Statement** screen displays (Figure 2).

Figure 2 Budget Impact Statement screen.

You have these options:

- Enter the Budget Impact Statement in the text box
- Upload the Budget Impact Statement

Enter the Budget Impact Statement in the Text Box

1. Type or copy and paste the Budget Impact Statement in the text box (Figure 2).
2. When finished, click the **Save Text** button under the text box (Figure 2). The **Project Budget** screen displays (Figure 1).

Upload the Budget Impact Statement

On the **Budget Impact Statement** screen (Figure 2), click the **Transfer File** button. The **Budget Impact Statement File Upload** screen displays (Figure 3). See Upload a File for instructions for uploading the Budget Impact Statement.

Figure 3 Budget Impact Statement File Upload screen.

When you have accepted the upload, the **Budget Impact Statement File Upload** screen displays (Figure 4) with these new options:

- Display Current Budget Impact Statement
- Delete Current Budget Impact Statement

Figure 4 Budget Impact Statement screen after you have uploaded a file.

Display Current Budget Impact Statement

Click the **Display Current Budget Impact Statement** button (Figure 4). The previously uploaded Budget Impact Statement displays in PDF format. See Adobe Reader for FastLane, if you need to download Adobe Reader.

Delete Current Budget Impact Statement

1. Click the **Delete Current Budget Impact Statement** button (Figure 4). A screen displays with a message for you to confirm the deletion.

2. Click the **Yes** button. The **Budget Impact Statement File Upload** screen displays as in Figure 3.

Refresh to the Last Submitted Budget

1. Access the **Proposal Revised Budget** screen (Figure 1) (see Access the Proposal Revised Budget Screen).

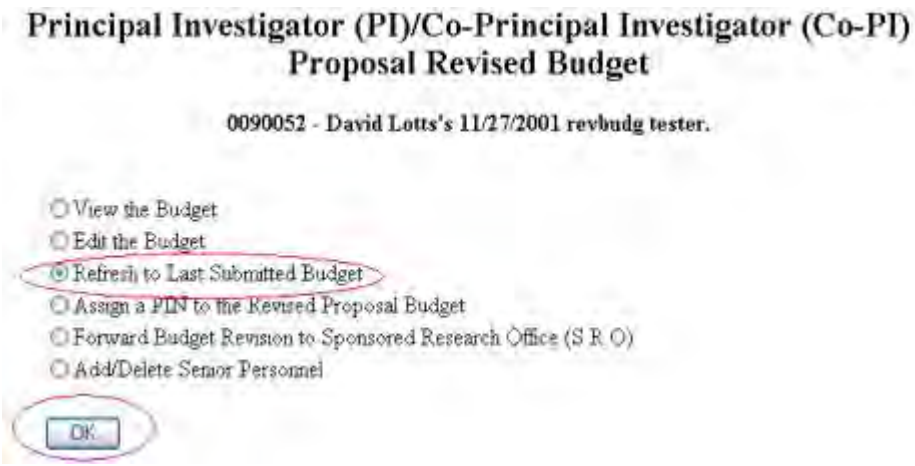


Figure 1 Proposal Revised Budget screen. The radio button for Refresh to Last Submitted Budget and the OK button are circled.

2. Click the radio button for Refresh to Last Submitted Budget (Figure 1).
3. Click the **OK** button (Figure 1). The **Refresh to Last Submitted Budget** screen displays (Figure 2) with a warning that refreshing to the last submitted budget results in the deletion of the Working Budget.

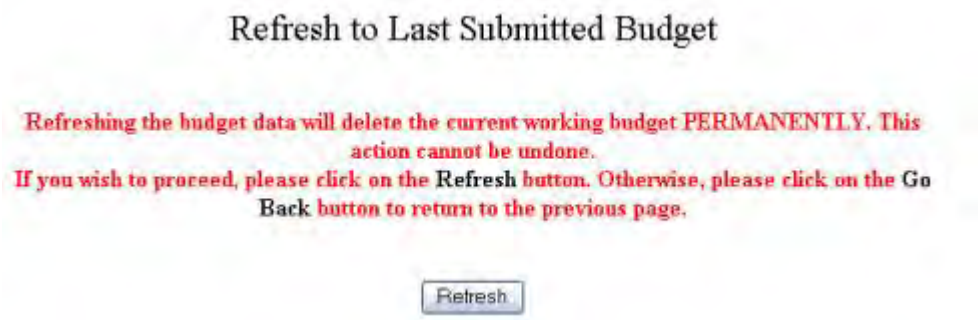


Figure 2 Refresh to Last Submitted Budget screen with the message that refreshing to the last submitted budget deletes the Working (revised) Budget.

4. Click the **Refresh** button (Figure 2). A screen displays (Figure 3) with a message that the refresh was successful.

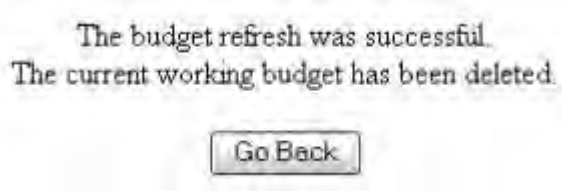


Figure 3 Screen with message that the budget refresh was successful.

5. Click the **Go Back** button (Figure 3). The **Proposal Revised Budget** screen displays (Figure 1).

Assign a PIN to a Revised Proposal Budget

1. Access the **Proposal Revised Budget** screen (Figure 1) (see Access the Proposal Revised Budget Screen).

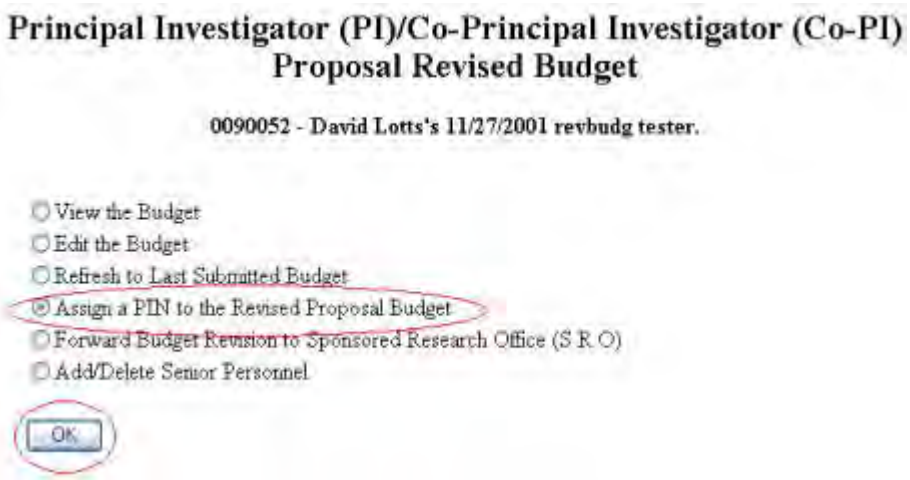


Figure 1 Proposal Revised Budget screen. The radio button for Assign a PIN to the Revised Proposal Budget and the OK button are circled.

2. Click the radio button for Assign a PIN to the Revised Proposal Budget (Figure 1).
3. Click the **OK** button (Figure 1). The **Assign or Change Revised Proposal Budget PIN** screen displays (Figure 2).

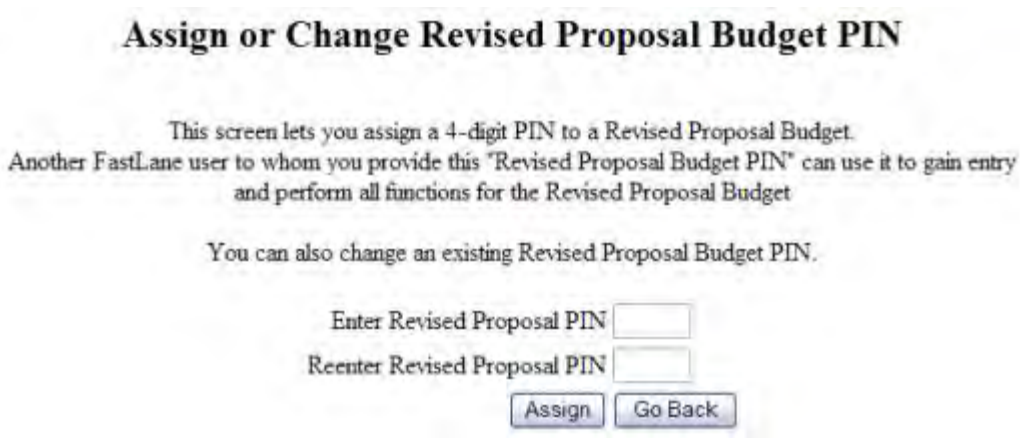


Figure 2 Assign or Change Revised Proposal Budget PIN screen.

4. In the **Enter Revised Proposal PIN** box (Figure 2), type the new PIN.
5. In the **Reenter Revised Proposal PIN** box (Figure 2), type the new PIN again.
6. Click the **Assign** button (Figure 2). The **Revised Proposal Budget PIN** screen displays (Figure 3) with the message that the PIN has been changed for the Revised Proposal Budget.

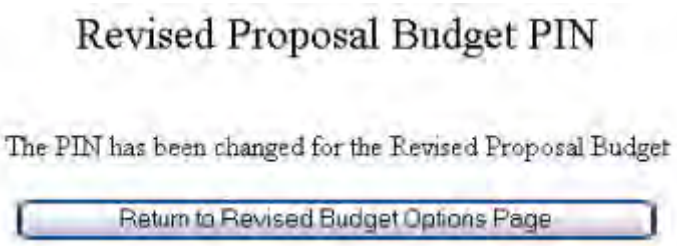


Figure 3 Revised Proposal Budget PIN screen.

7. Click the **Return to Revised Budget Options Page** button (Figure 3). The **Proposal Revised Budget** displays (Figure 1).

Forward a Revised Proposal Budget to the SPO

1. Access the **Proposal Revised Budget** screen (Figure 1) (see Access the Proposal Revised Budget screen).

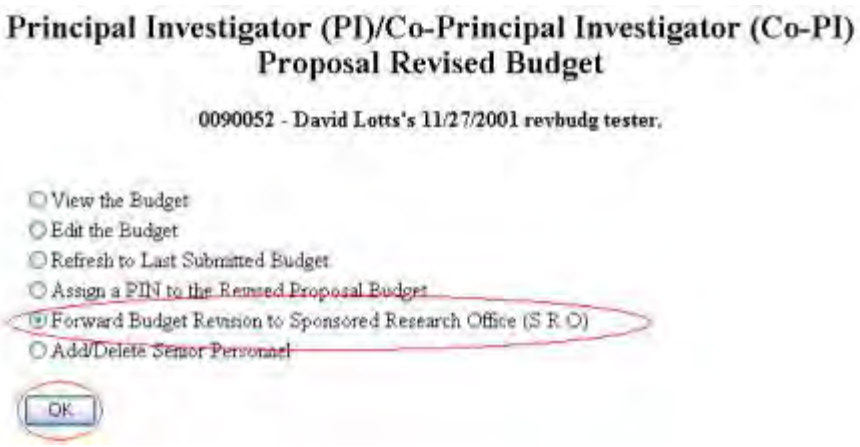


Figure 1 Proposal Revised Budget screen. The radio button for Forward Budget Revision to Sponsored Project Office (SPO) and the OK button are circled.

2. Click the radio button for Forward Revised Submitted Budget to Sponsored Project Office (SPO) (Figure 1).
3. Click the **OK** button (Figure 1). The **Forward Budget Revision to SPO** screen displays (Figure 2).

Figure 2 Forward Budget Revision to SPO screen.

4. Click the **Forward** button (Figure 2). The **Forward Budget Revision** screen displays (Figure 3) with a message that the Revised Submitted Budget has been sent to your SPO.

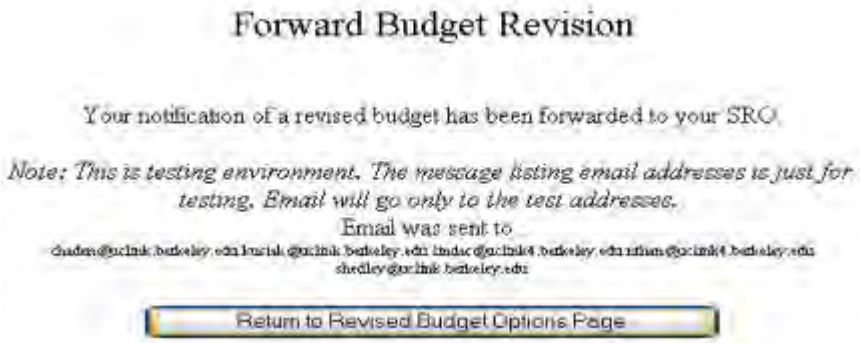


Figure 3 Forward Budget Revision screen.

5. Click the **Return to Revised Budget Options Page** button (Figure 3). The **Proposal Revised Budget** screen displays (Figure 1).

Add/Delete Senior Personnel for Revised Budget

1. Access the **Proposal Revised Budget** screen (Figure 1) (see Access the Proposal Revised Budget Screen).

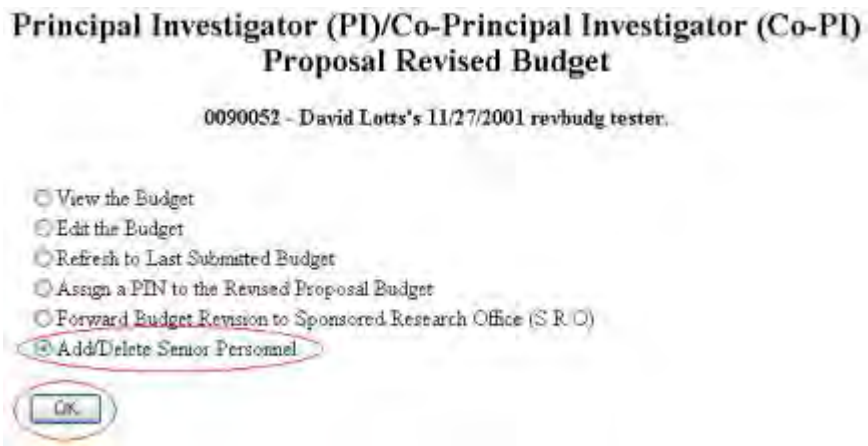


Figure 1 Proposal Revised Budget screen. The radio button for Add/Delete Senior Personnel and the OK button are circled.

2. Click the radio button for Add/Delete Senior Personnel (Figure 1).
3. Click the **OK** button (Figure 1). The **Add/Delete Non-Co-Principal Investigator (PI) Senior Personnel Assigned to Proposal** screen displays (Figure 2).

Figure 2 Add/Delete Non-Co-Principal Investigator (Co-PI) Senior Personnel Assigned to Proposal.

4. See Add a Senior Person, Step 3 and Delete a Senior Person, Step 2 for instructions.

SPO Functions

Revise Submitted Proposal Budget as SPO Introduction

As an SPO, you have these options for working on a Revised Proposal Budget:

- View and print a revised budget forwarded by a PI
- Edit a Revised Proposal Budget
- Prepare a Budget Impact Statement
- Refresh to the last submitted budget
- View and print a revised budget that has been submitted to NSF

As an AOR, you can do all of the above and the following:

- Submit a revised budget to NSF

Revise Submitted Proposal Budget as SPO Introduction

As an SPO, you have these options for working on a Revised Proposal Budget:

- View and print a revised budget forwarded by a PI
- Edit a Revised Proposal Budget
- Prepare a Budget Impact Statement
- Refresh to the last submitted budget
- View and print a revised budget that has been submitted to NSF

As an AOR, you can do all of the above and the following:

- Submit a revised budget to NSF

View and Print a Revised Budget Forwarded by a PI

1. On the **FastLane Home Page** screen, log in to Research Administration (see SPO/AOR Login). The **Research Administration** screen displays (Figure 1).

Figure 1 Research Administration screen. The Forwarded / Submitted Revised Budgets link is circled.

2. Click **Forwarded / Submitted Revised Budgets** (Figure 1). **The Forwarded / Submitted Revised Budgets** screen displays on the **Forwarded by PI** tab (Figure 2).

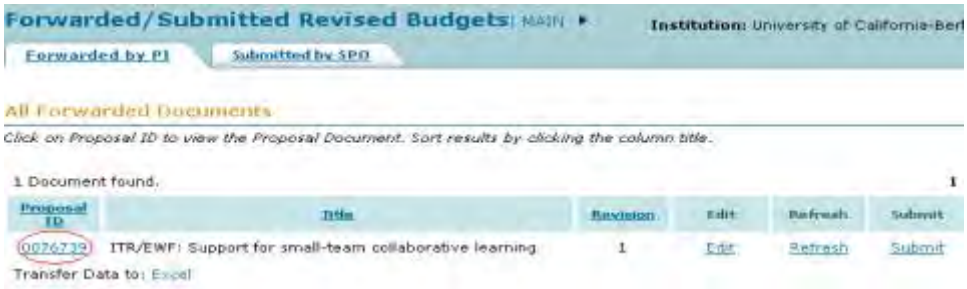


Figure 2 Forwarded / Submitted Revised Budgets screen on the Forwarded by PI tab. The Proposal ID link is circled for a revised budget.

3. In the **All Forwarded Documents** list on the **Forwarded by PI** tab (Figure 2), click the Proposal ID number on the row for the proposal whose budget you want to view. The **View / Print Revised Budget(s)** screen displays (Figure 3).

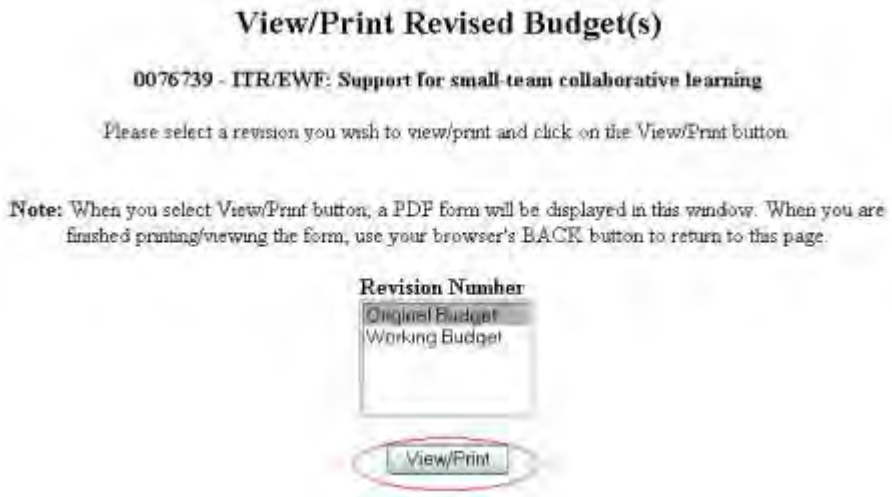
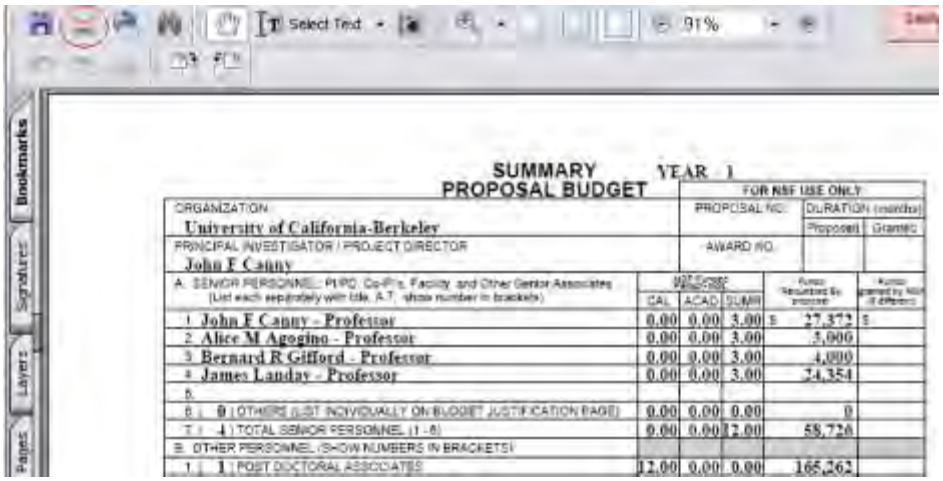


Figure 3 View / Print Revised Budget(s) screen. The View / Print button is circled.

4. Highlight the budget that you want to view in the **Revision Number** list (Figure 3). The Original Budget is the budget submitted with the original proposal. The Working Budget is the latest revised submitted budget.
5. Click the **View / Print** button (Figure 3). The **Summary Proposal Budget** screen displays (Figure 4) with the budget in PDF format. If you need to download Adobe Reader, see Adobe Reader for FastLane.



SUMMARY PROPOSAL BUDGET — YEAR 1

FOR NSF USE ONLY

ORGANIZATION: University of California-Berkeley

PROPOSAL NO.: | DURATION (months): Proposed / Granted

PRINCIPAL INVESTIGATOR / PROJECT DIRECTOR: John F Canny

AWARD NO.:

A. SENIOR PERSONNEL: PI/PD, Co-PI's, Faculty, and Other Senior Associates (List each separately with title, A.7. show number in brackets)	NSF-Funded Person-months CAL	ACAD	SUMR	Funds Requested by proposer	Funds granted by NSF (if different)
1. John F Canny - Professor	0.00	0.00	3.00	$ 27,372	$
2. Alice M Agogino - Professor	0.00	0.00	3.00	5,000	
3. Bernard R Gifford - Professor	0.00	0.00	3.00	4,000	
4. James Landay - Professor	0.00	0.00	3.00	24,354	
5.					
6. 0 OTHERS (LIST INDIVIDUALLY ON BUDGET JUSTIFICATION PAGE)	0.00	0.00	0.00	0	
7. 4 TOTAL SENIOR PERSONNEL (1 - 6)	0.00	0.00	12.00	58,726	
B. OTHER PERSONNEL (SHOW NUMBERS IN BRACKETS)					
1. 1 POST DOCTORAL ASSOCIATES	12.00	0.00	0.00	165,262	

Figure 4 Summary Proposal Budget screen in PDF format. The Print icon is circled.

6. To print the displayed budget, click the **Print** icon (Figure 4) on the **Summary Proposal Budget** screen (Figure 4). The budget prints.
7. Click the back button of your browser to return to the **View / Print Revised Budget(s)** screen (Figure 3).

Edit a Revised Proposal Budget

1. On the **FastLane Home Page** screen, log in to Research Administration (see SPO Login). The **Research Administration** screen displays (Figure 1).

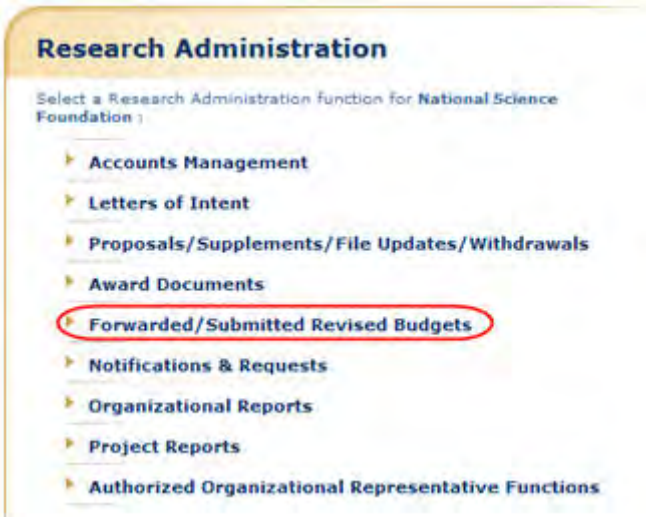


Figure 1 Research Administration screen. The Forwarded / Submitted Revised Budgets link is circled.

2. Click **Forwarded / Submitted Revised Budgets** (Figure 1). The **Forwarded / Submitted Revised Budgets** screen displays on the **Forwarded by PI** tab (Figure 2).

Figure 2 Forwarded / Submitted Revised Budgets screen on the Forwarded by PI tab screen. The Edit link is circled for a revised submitted budget.

3. Click **Edit** on the row for the proposal whose revised budget you want to edit (Figure 2). The **Project Budget** screen displays (Figure 3).

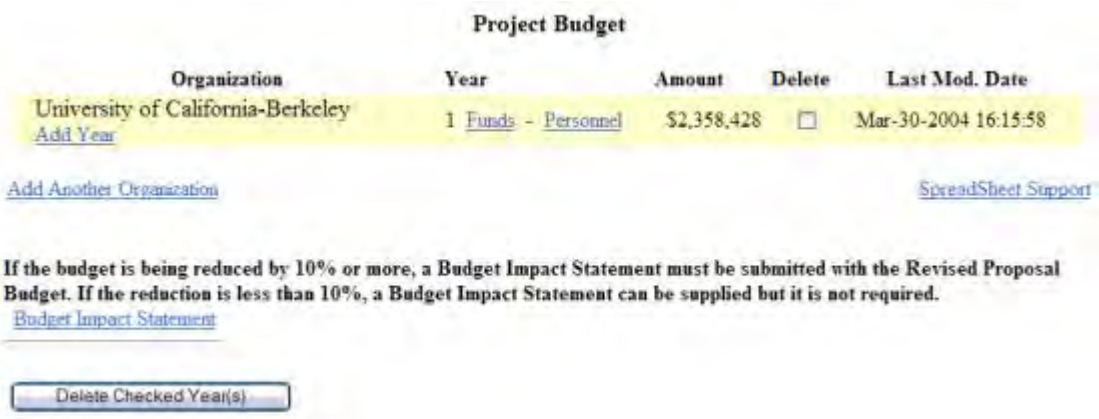


Figure 3 Project Budget screen.

4. To edit any budget year, see Budgets (Including Justification) and Enter the Budget Data Online for instructions.

Once you have calculated and saved the edited budget, it is listed as the Working Budget on the **View / Print Revised Budget(s)** screen (Figure 4).

To access the **View / Print Revised Budget(s)** screen:

1. Return to the **Forwarded / Submitted Revised Budget** screen on the **Forwarded by PI** tab (Figure 2).
2. Click the Proposal ID number on the row for the proposal budget you are working on. The **View / Print Budget(s)** screen displays (Figure 4).

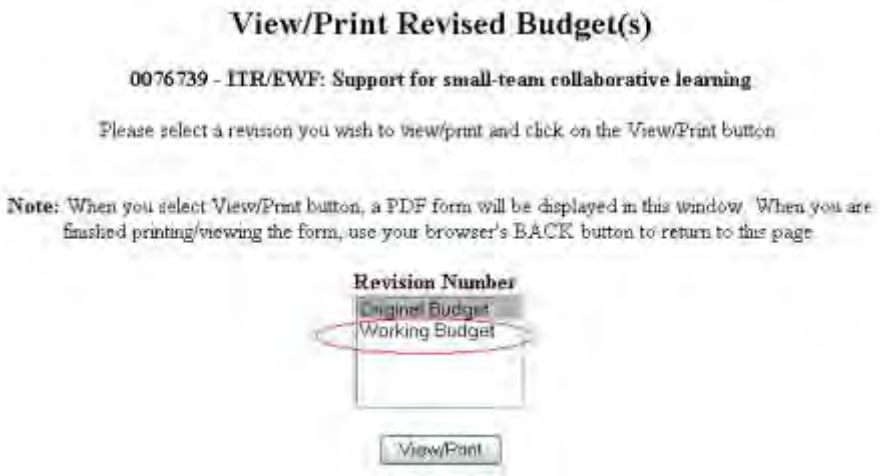


Figure 4 View / Print Revised Budget(s) screen with the edited Revised Budget listed as the Working Budget (circled).

Prepare a Budget Impact Statement as an SPO/AOR

If you are reducing the budget by more than 10%, you must also submit a Budget Impact Statement with the Revised Submitted Budget.

1. On the **FastLane Home Page** screen, log in to Research Administration (see SPO/AOR Login). The **Research Administration** screen displays (Figure 1).

Figure 1 Research Administration screen. The Forwarded / Submitted Revised Budgets link is circled.

2. Click **Forwarded/Submitted Revised Budgets** (Figure 1). The **Forwarded/Submitted Revised Budgets** screen displays on the **Forwarded by PI** tab (Figure 2).

Figure 2 Forwarded/Submitted Revised Budgets screen on the Forwarded by PI tab screen. The Edit link is circled for a revised submitted budget.

3. Click **Edit** on the row for the proposal whose revised budget you want to edit (Figure 2). The **Project Budget** screen displays (Figure 3).

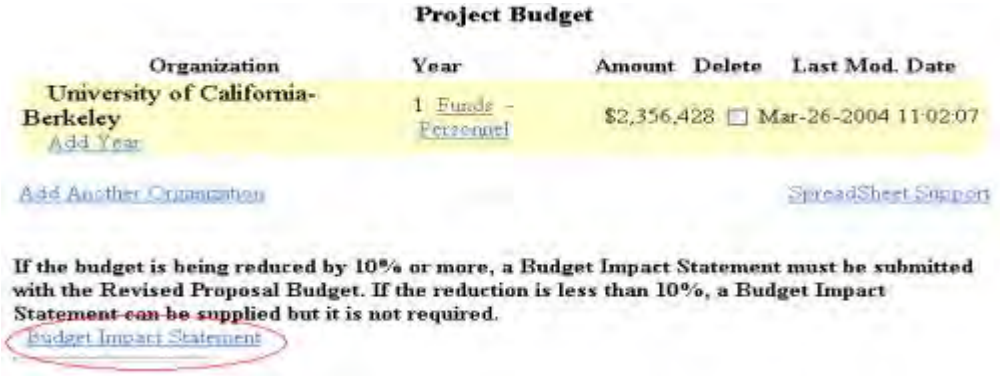


Figure 3 Project Budget screen. The Budget Impact Statement link is circled.

4. On the **Project Budget** screen (Figure 3), click **Budget Impact Statement**. The **Budget Impact Statement** screen displays (Figure 4).

Figure 4 Budget Impact Statement screen.

You have these options:

- Enter the Budget Impact Statement in the text box
- Upload the Budget Impact Statement

Enter the Budget Impact Statement in the Text Box

1. Type or copy and paste the Budget Impact Statement in the text box (Figure 4).
2. Click the **Save Text** button (Figure 4). A screen displays with the confirmation message that FastLane has saved the data.
3. Click the **OK** button. The **Project Budget** screen displays (Figure 3).

Upload the Budget Impact Statement

On the **Budget Impact Statement** screen (Figure 4), click the **Transfer File** button. The **Budget Impact Statement File Upload** screen displays (Figure 5). See Upload a File for instructions.

Figure 5 Budget Impact Statement File Upload screen.

When you have accepted the upload, the **Budget Impact Statement File Upload** screen displays (Figure 6) with these new options:

- Display Current Budget Impact Statement
- Delete Current Budget Impact Statement

Figure 6 Budget Impact Statement File Upload screen after you have uploaded a file.

Display Current Budget Impact Statement

1. On the **Budget Impact Statement File Upload** screen (Figure 6), click the **Display Current Budget Impact Statement** button. The uploaded Budget Impact Statement displays in PDF format. If you need to download Adobe Reader, see Adobe Reader for FastLane.
2. Click the browser back button to return to the **Budget Impact Statement File Upload** screen (Figure 6).

Delete Current Budget Impact Statement

1. On the **Budget Impact Statement File Upload** screen (Figure 6), click the **Delete Current Budget Impact Statement** button. A screen displays with a message for you to confirm that you want to delete the file.
2. Click the **OK** button. The **Budget Impact Statement File Upload** screen displays as in Figure 5.

Refresh to the Last Submitted Budget as an SPO/AOR

1. On the **FastLane Home Page** screen, log in to Research Administration (see SPO/AOR Login). The **Research Administration** screen displays (Figure 1).

Figure 1 Research Administration screen. The Forwarded/Submitted Revised Budgets link is circled.

2. Click **Forwarded/Submitted Revised Budgets** (Figure 1). **The Forwarded/Submitted Revised Budgets** screen displays on the **Forwarded by PI** tab (Figure 2).

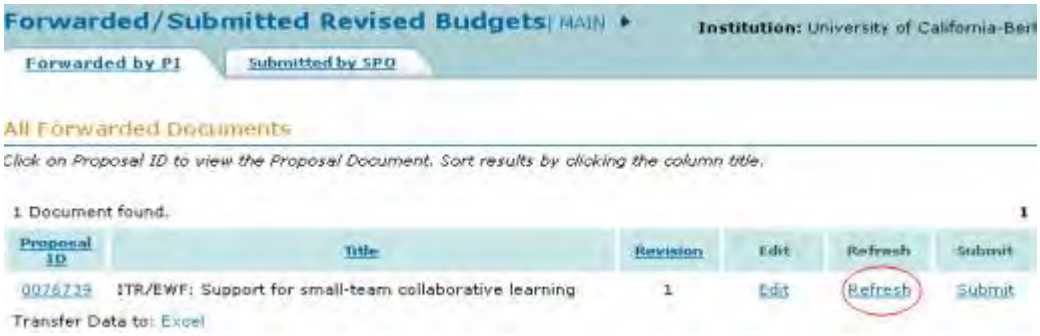


Figure 2 Forwarded/Submitted Revised Budgets screen on the Forwarded by PI tab. The Refresh link is circled.

3. Click **Refresh** for the Revised Proposal Budget you want to refresh (Figure 2). The **Refresh to Last Submitted Budget** screen displays (Figure 3) with a warning that refreshing to the last submitted budget deletes the Working Budget, which is the latest revised budget.

Figure 3 Refresh to Last Submitted Budget screen. The Refresh button is circled.

4. Click the **Refresh** button (Figure 3). A screen displays (Figure 4) with the message that the refresh was successful.

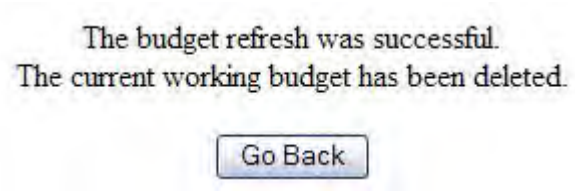


Figure 4 Screen with the message that the refresh was successful and that the Working Budget has been deleted.

5. Click the **Go Back** button (Figure 4). The **Forwarded/Submitted Revised Budgets** screen displays on the **Forwarded by PI** tab (Figure 2).

Submit a Revised Submitted Budget (AOR only)

1. On the **FastLane Home Page** screen, log in to Research Administration (see SPO/AOR Login). The **Research Administration** screen displays (Figure 1).

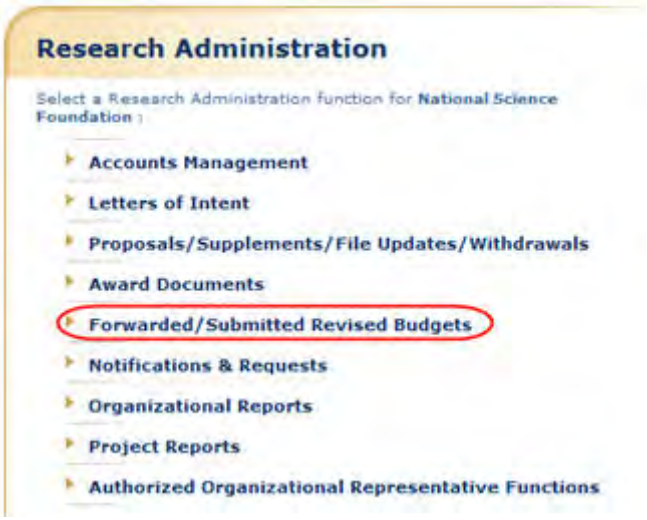


Figure 1 Research Administration screen. The Forwarded/Submitted Revised Budgets link is circled.

2. Click **Forwarded/Submitted Revised Budgets** (Figure 1). The **Forwarded/Submitted Revised Budgets** screen displays on the **Forwarded by PI** tab (Figure 2).

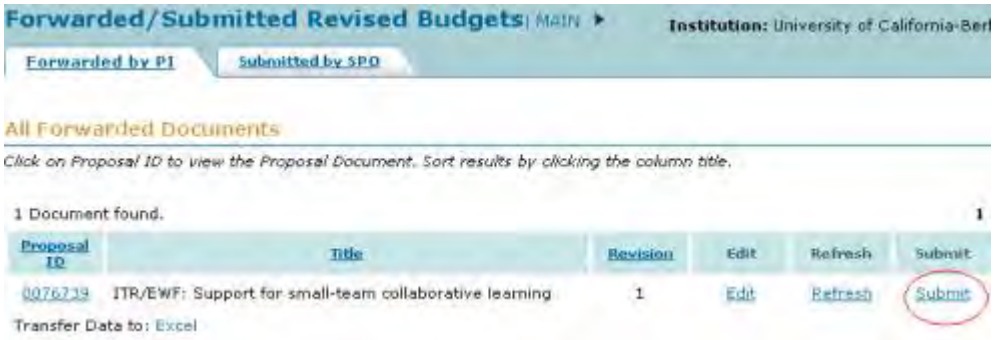


Figure 2 Forwarded/Submitted Revised Budgets screen on the Forwarded by PI tab. The Submit link is circled.

3. Click **Submit** (Figure 2) in the row of the proposal for which you want to submit a Revised Proposal Budget. The **Submit the Revised Budget** screen displays (Figure 3) with the Certification for Authorized Organizational Representative.

Figure 3 Submit the Revised Budget screen. The Sign and Submit button is circled.

4. Click the **Sign and Submit** button (Figure 3). The **Revised Budget Submitted** screen displays (Figure 4) with the message that the Revised Proposal Budget has been submitted to NSF.

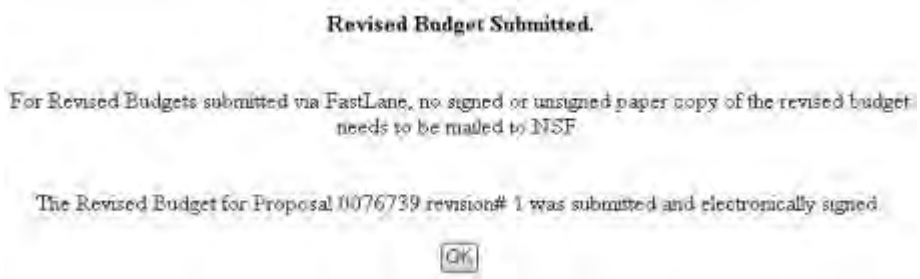


Figure 4 Revised Budget Submitted screen.

5. Click the **OK** button (Figure 4). The **Forwarded / Submitted Revised Budgets** screen displays on the **Forwarded by PI** tab (Figure 2).

View and Print a Revised Proposal Budget that has been Submitted

1. On the **FastLane Home Page** screen, log in to Research Administration (see SPO/AOR Login). The **Research Administration** screen displays (Figure 1).

Figure 1 Research Administration screen. The Forwarded / Submitted Revised Budgets link is circled.

2. Click **Forwarded / Submitted Revised Budgets** (Figure 1). **The Forwarded / Submitted Revised Budgets** screen displays on the **Forwarded by PI** tab (Figure 2).

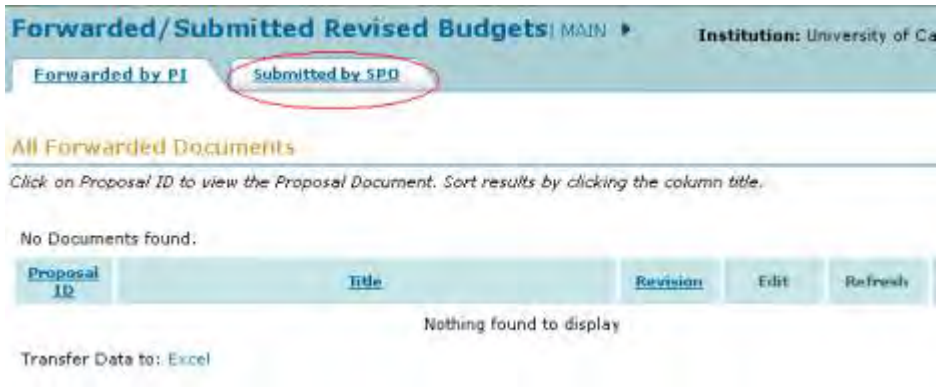


Figure 2 Forwarded/Submitted Revised Budgets screen. The Submitted by SPO tab is circled.

3. Click the **Submitted by SPO** tab on the **Forwarded/Submitted Revised Budgets** screen (Figure 2). The **Forwarded/Submitted Revised Budgets** screen displays on the **Submitted by SPO** tab (Figure 3) with two options:
   - Search by date range for submitted revised budgets
   - View and print a revised budget

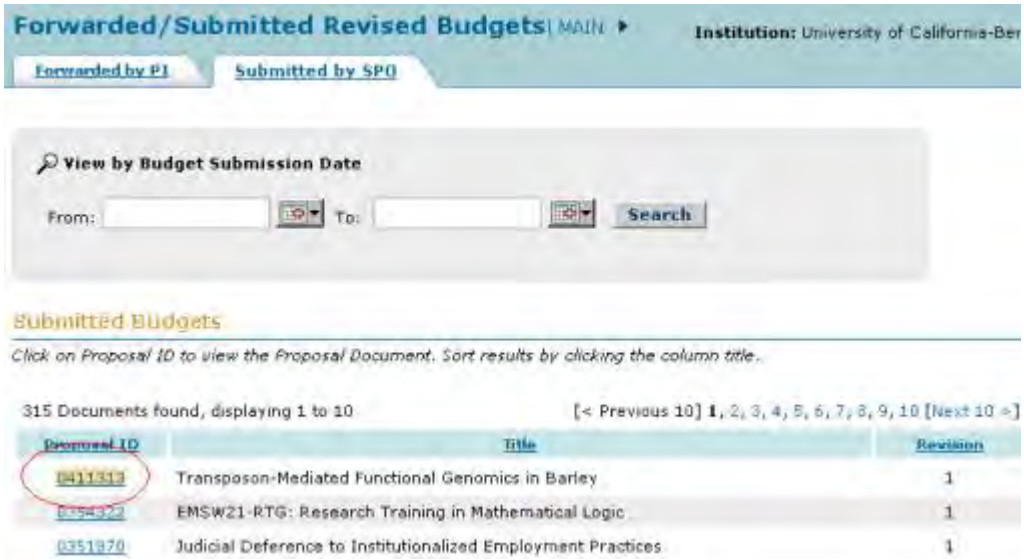


Figure 3 Forwarded/Submitted Revised Budgets screen on the Submitted by SPO tab. The Proposal ID number for a proposal is circled.

Search by Date Range for Submitted Revised Budgets

1. On the **Forwarded/Submitted Revised Budgets** screen on the **Submitted by SPO** tab (Figure 3), type the date ranges in the **From** and **To** boxes in mm/dd/yyyy format.
2. Click the **Search** button (Figure 3). The Submitted Revised Budgets in that date range display in the **Submitted Budgets** section of the screen.

View and Print a Revised Budget

1. On the **Forwarded / Submitted Revised Budgets** screen on the **Submitted by SPO** tab (Figure 3), click the Proposal ID number on the row for the proposal whose budget you want to view. The **View / Print Revised Budget(s)** screen displays (Figure 4).

Figure 4 View / Print Revised Budget(s) screen. The View / Print button is circled.

2. In the **Revision Number** box (Figure 4), highlight the budget that you want to view.
3. Click the **View / Print** button (Figure 4). The **Summary Proposal Budget** screen displays you selected displays (Figure 5) with the budget in PDF format. If you need to download Adobe Reader, see Adobe Reader for FastLane.

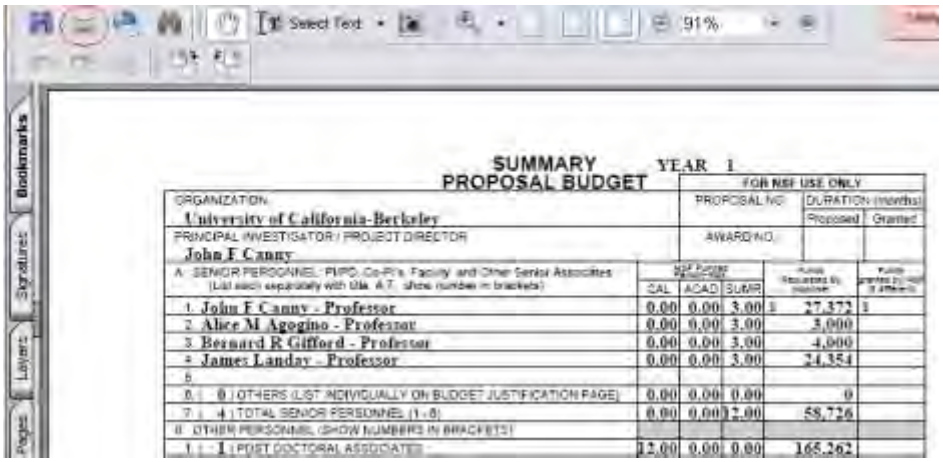


Figure 5 Summary Proposal Budget screen. The Print icon is circled.

4. To print the displayed budget, click the **Print** icon on the **Summary Proposal Budget** screen (Figure 5). The budget prints.
5. Click the browser back button to return to the **View / Print Revised Budget(s)** screen (Figure 4).

Withdraw a Proposal

Withdraw a Proposal (AOR only)

Print the contents of the Withdraw a Proposal book.

If the cognizant NSF Program Officer has not made a funding recommendation on a proposal, you may withdraw it through FastLane.

If the cognizant NSF Program Officer has made a funding recommendation on a proposal and you then try to withdraw it, a screen displays with a warning that this action is not allowed. You must then contact your NSF Program Officer for assistance to withdraw the proposal.

When you withdraw a proposal, you must select the type of withdrawal:

- Withdrawal of a duplicate proposal, in which case also give the Proposal Number of the proposal you want NSF to retain
- Withdrawal because of funding received from elsewhere
- Other type

NSF also requests that you provide a detailed reason for the Proposal Withdrawal.

If you are withdrawing the lead or non-lead proposal from a collaborative proposal, NSF does the following:

- Withdraws the entire collaborative proposal
- Notifies the PI and SPO of the organizations for the other proposals that:
  - The collaborative proposal has been withdrawn.
  - They must submit a new collaborative proposal for NSF to consider the project.

For withdrawing a proposal, the PI can:

- Initiate a Proposal Withdrawal
- Forward a Proposal Withdrawal to the SPO

The SPO can:

- Initiate a Proposal Withdrawal

The AOR can:

- Initiate a Proposal Withdrawal
- Submit a Proposal Withdrawal
- Submit a Proposal Withdrawal forwarded by a PI

Withdraw a Proposal (AOR only)

Print the contents of the Withdraw a Proposal book.

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- Forward a Proposal Withdrawal to the SPO

The SPO can:
- Initiate a Proposal Withdrawal

The AOR can:
- Initiate a Proposal Withdrawal
- Submit a Proposal Withdrawal
- Submit a Proposal Withdrawal forwarded by a PI

PI Functions

Withdraw a Proposal as PI

As a PI, you have these options for withdrawing a proposal:
- Initiate a Proposal Withdrawal
- Forward a Proposal Withdrawal to the SPO
- Save a Proposal Withdrawal
- Delete a saved Proposal Withdrawal

Withdraw a Proposal as PI

As a PI, you have these options for withdrawing a proposal:
- Initiate a Proposal Withdrawal
- Forward a Proposal Withdrawal to the SPO
- Save a Proposal Withdrawal
- Delete a saved Proposal Withdrawal

Initiate a Proposal Withdrawal

1. On the **FastLane Home Page** screen, log in as a PI to Proposals, Awards, and Status (see PI/Co-PI Login). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Managemen**t screen displays (Figure 1).

Figure 1 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management screen. The Proposal Functions link is circled.

2. Click **Proposal Functions** (Figure 1). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Proposal Functions** screen displays (Figure 2).

Figure 2 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Proposal Functions screen. The Proposal Preparation link is circled.

3. Click **Proposal Preparation** (Figure 1). The **Principal Investigator (PI) Information** screen displays (Figure 3).

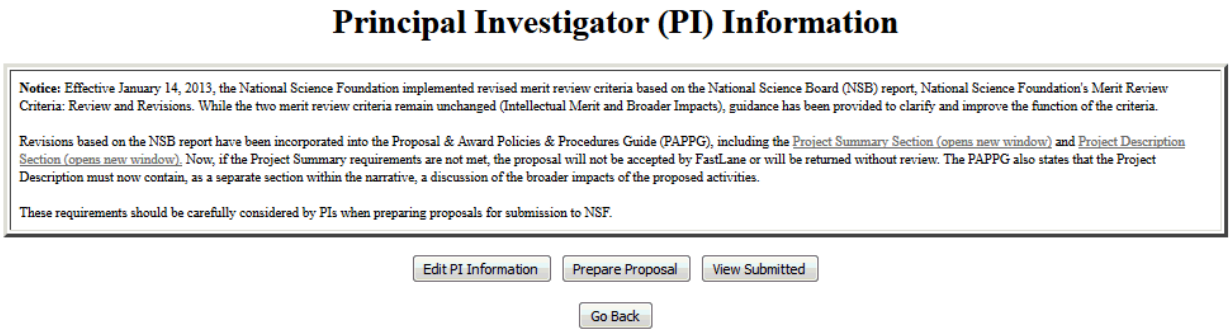

Figure 3 Principal Investigator (PI) Information screen. The View Submitted button is circled.

4. Click the **View Submitted** button (Figure 3). The **Submitted Proposals** screen displays (Figure 4).

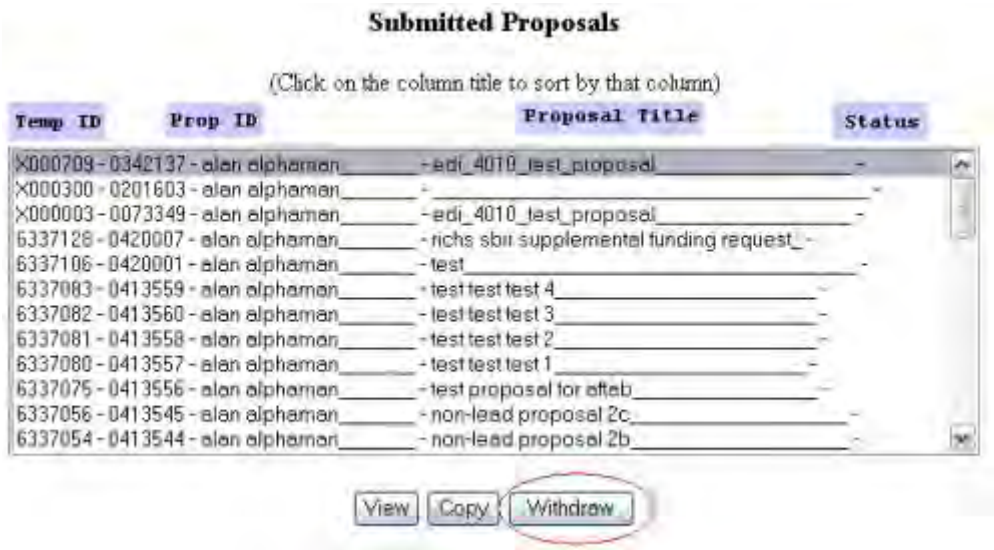

Figure 4 Submitted Proposals screen. The Withdraw button is circled.

5. Highlight the proposal that you want to withdraw from the **Submitted Proposals** list (Figure 4).
6. Click the **Withdraw** button (Figure 4). The **Proposal Withdrawal** screen displays (Figure 5).

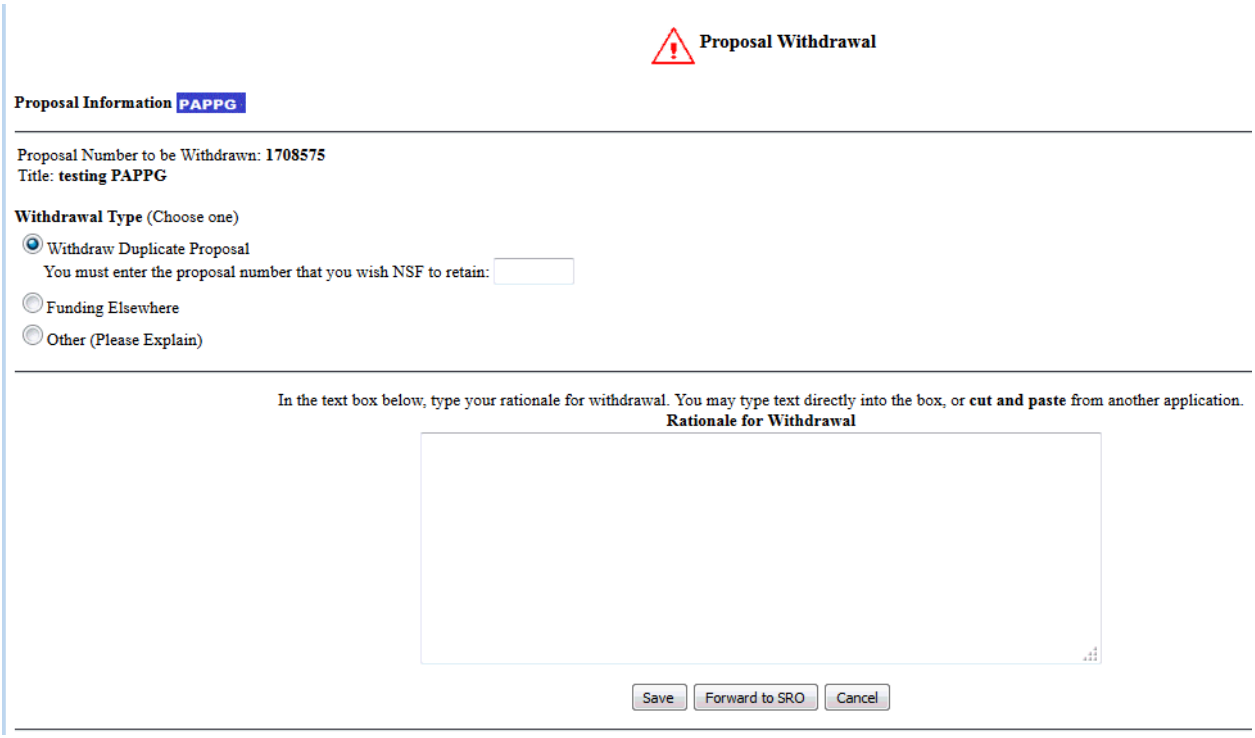

Figure 5 Proposal Withdrawal screen. The Forward to SPO button is circled.

7. Select the **Withdrawal Type** by clicking the radio button for one of the following (Figure 5):
   - **Withdraw Duplicate Proposal**
     Also type in the box the Proposal Number for the temporary proposal you wish NSF to retain.
   - **Funding Elsewhere**
   - **Other**
8. In the **Rationale for Withdrawal** text box (Figure 5), type or copy and paste a detailed reason or reasons for withdrawing the proposal.
9. Click the **Forward to SPO** button to send the Proposal Withdrawal to the SPO (see Forward a Proposal Withdrawal to the SPO for further instructions). Or, *if you do not want to forward the Withdrawal Request immediately to the SPO,* you can save the Proposal Withdrawal (see Save a Proposal Withdrawal, Step 4).

If you select a non-lead or lead proposal of a collaborative proposal to withdraw, when you click the **Withdraw** button on the **Submitted Proposals** screen (Figure 4), a screen displays (Figure 6) with a message for you to confirm that you want to continue to withdraw the proposal.

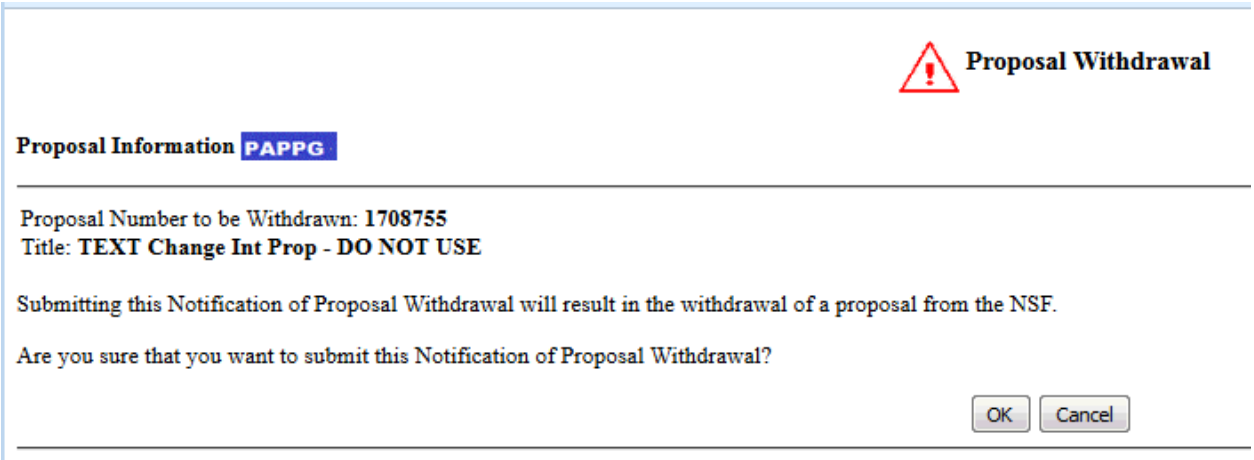

Figure 6 Warning screen for withdrawal of collaborative proposals.

1. Click the **Yes** button (Figure 6). The **Proposal Withdrawal** screen displays (Figure 5).
2. Go to Step 7 above to complete the Proposal Withdrawal.

Forward a Proposal Withdrawal to the SPO

1. Access the **Proposal Withdrawal** screen (Figure 1) (see Initiate a Proposal Withdrawal, Step 1 through Step 8).

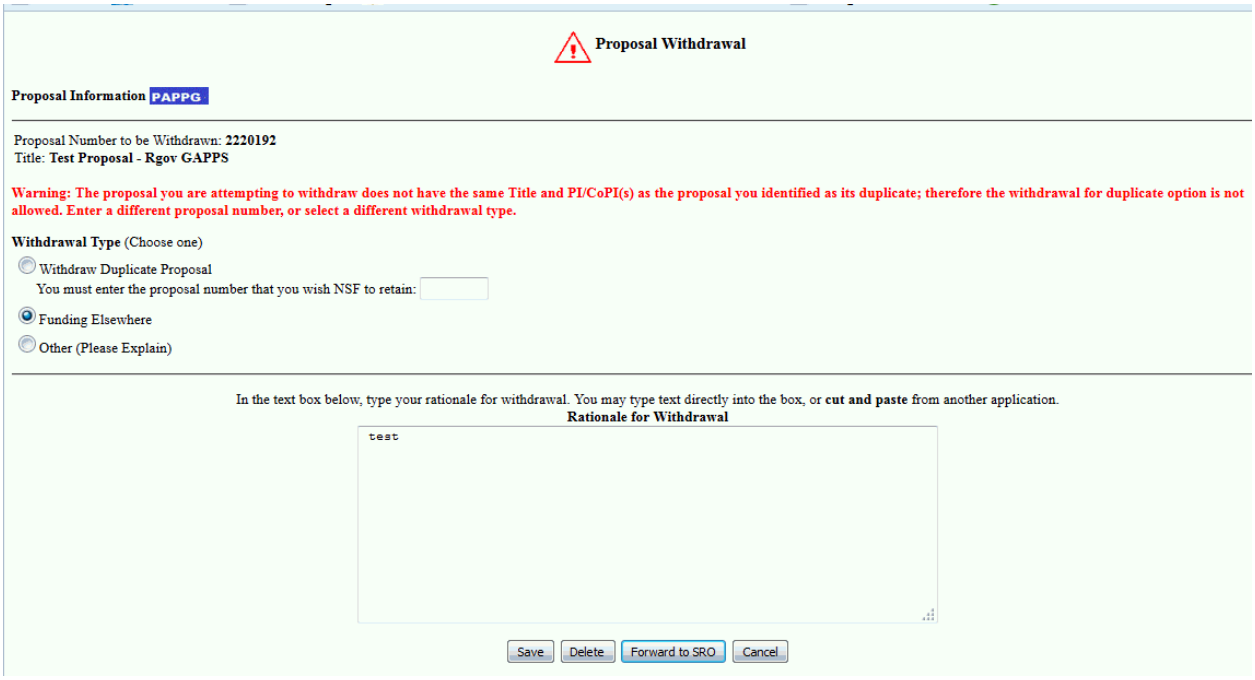

Figure 1 Proposal Withdrawal screen. The Forward to SPO button is circled.

2. Click the **Forward to SPO** button (Figure 1) to send the Proposal Withdrawal to your SPO for submission to NSF. The **Your Notification Was Forwarded** screen displays (Figure 2) with the message that the Proposal Withdrawal is forwarded to your SPO.

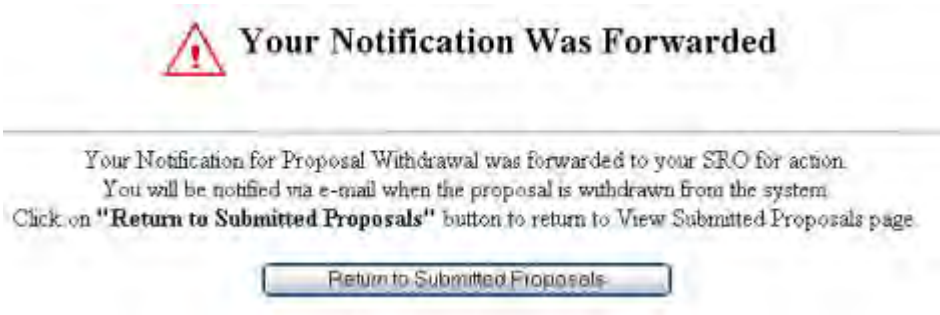

Figure 2 Your Notification Was Forwarded screen with the message that the Proposal Withdrawal was forwarded to the SPO.

3. Click the **Return to Submitted Proposals** button (Figure 2). The **Submitted Proposals** screen displays (Figure 3).

Figure 3 Submitted Proposals screen.

If you selected a non-lead or lead proposal of a collaborative proposal to withdraw, when you click the **Forward to SPO** button, the **Your Notification Was Forwarded** screen displays (Figure 4) with the message that NSF will notify the SPO and PI of the participating organizations that the collaborative proposal is withdrawn. Click the **Return to Submitted Proposals** button (Figure 4). The **Submitted Proposals** screen displays (Figure 3).

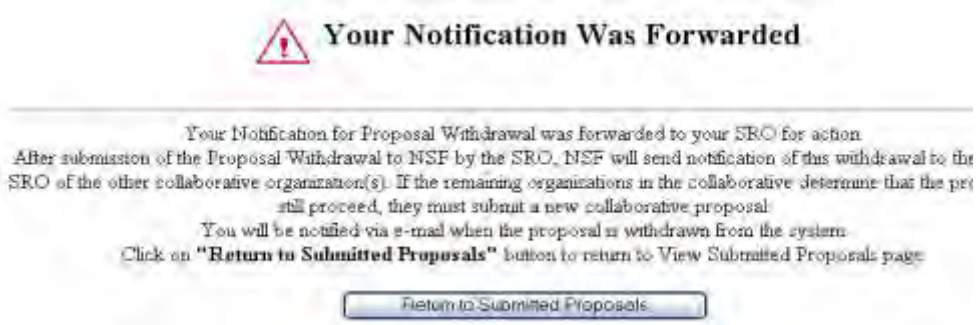

Figure 4 Your Notification Was Forwarded screen with the message that the collaborating organizations will be notified that the collaborative proposal was withdrawn.

Save a Proposal Withdrawal

1. Access the **Proposal Withdrawal** screen (Figure 1) (see Initiate a Proposal Withdrawal, Step 1 through Step 8).

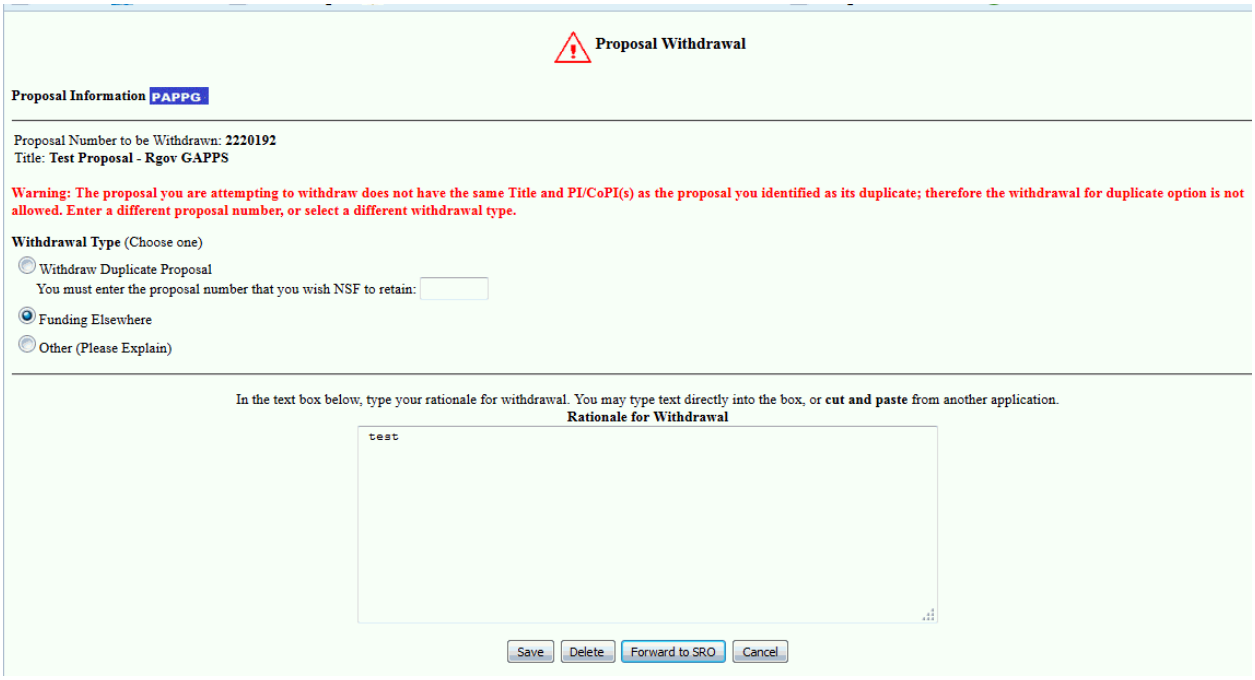

Figure 1 Proposal Withdrawal screen. The Save button is circled.

2. Select the **Withdrawal Type** by clicking on the radio button for one of the following (Figure 1):
   - **Withdraw Duplicate Proposal**
     Type in the box the Proposal Number for the temporary proposal you wish NSF to retain.
   - **Funding Elsewhere**
   - **Other**

3. In the **Rationale for Withdrawal** text box (Figure 1), type in or copy and paste a detailed reason or reasons for withdrawing the proposal.
4. Click the **Save** button (Figure 1). The **Your Notification Was Saved Successfully** screen displays (Figure 2) with the message that the Proposal Withdrawal was saved.

Figure 2 Your Notification Was Saved Successfully screen with the message that the Proposal Withdrawal was saved.

5. Click the **Return to Submitted Proposals** button (Figure 2). The **Submitted Proposals** screen displays (Figure 3) with the proposal in the **Submitted Proposals** list.

Figure 3 Submitted Proposals screen. The Withdraw button is circled.

6. To work on the saved Proposal Withdrawal again, on the **Submitted Proposals** screen (Figure 3), highlight the proposal in the **Submitted Proposals** list
7. Click the **Withdraw** button (Figure 3). The **Proposal Withdrawal** screen displays (Figure 1) with the saved Proposal Withdrawal.

Delete a Saved Proposal Withdrawal

1. Access the **Submitted Proposals** screen (Figure 1) (see Initiate a Proposal Withdrawal, Step 1 through Step 4).

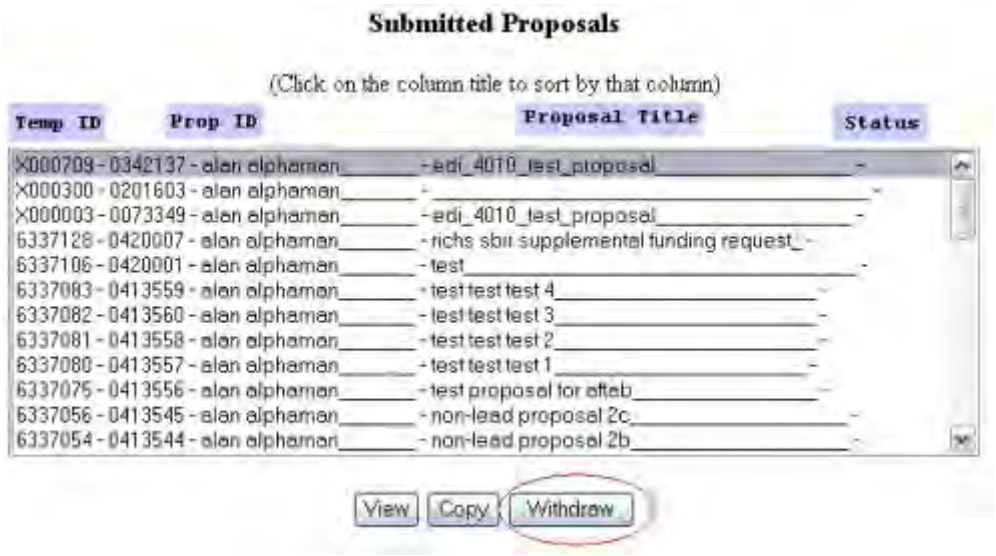

Figure 1 Submitted Proposals screen. The Withdraw button is circled.

2. Highlight the proposal from the **Submitted Proposals** list that you saved a Proposal Withdrawal for (Figure 1).
3. Click the **Withdraw** button (Figure 1). The **Proposal Withdrawal** screen displays (Figure 2) with the saved Proposal Withdrawal.

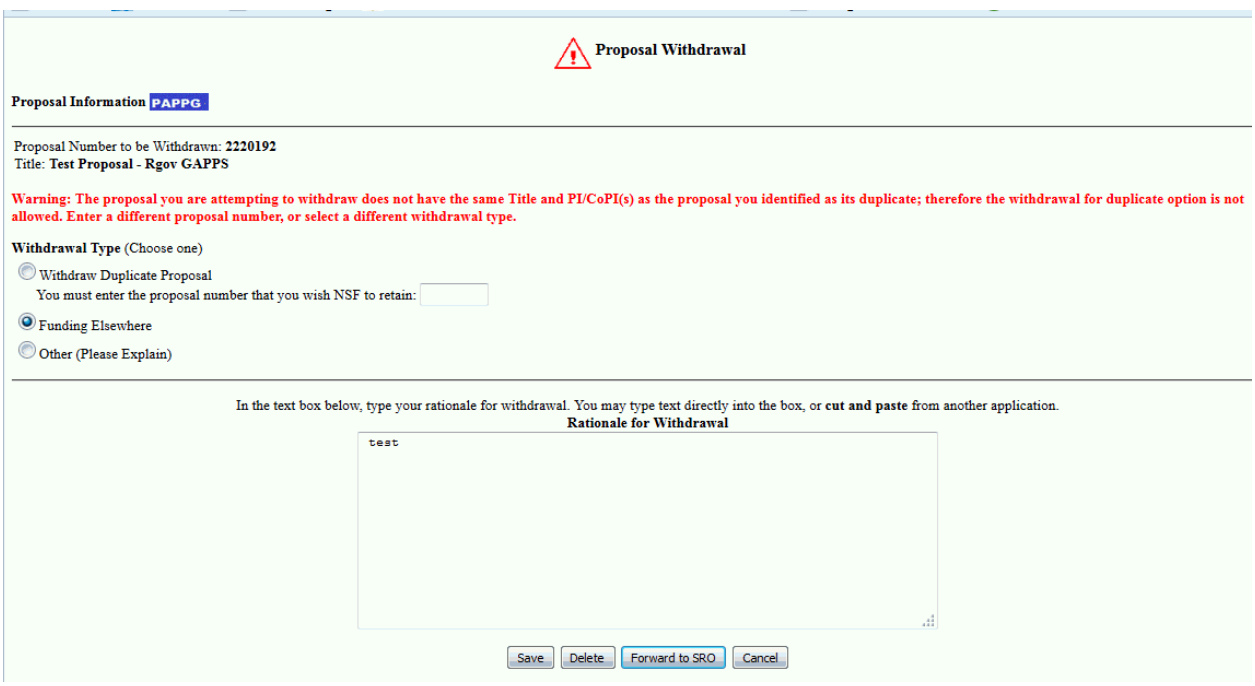

Figure 2 Proposal Withdrawal screen. The Delete button is circled.

4. Click the **Delete** button (Figure 2). The **Your Notification Was Deleted** screen displays (Figure 3) with the message that the Proposal Withdrawal was deleted.

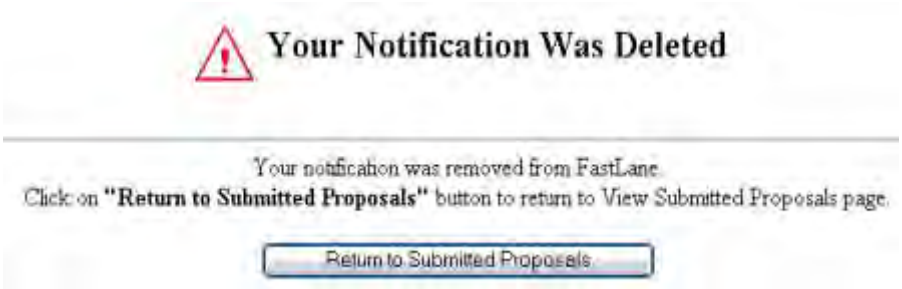

Figure 3 Your Notification Was Deleted screen.

5. Click the **Return to Submitted Proposals** button (Figure 3). The **Submitted Proposals** screen displays (Figure 1). You still have the option of initiating a new Proposal Withdrawal.

SPO Functions

Withdraw a Proposal as SPO

As an SPO, you have these options for withdrawing a proposal:

- Edit/Save a Proposal Withdrawal
- Delete a saved Proposal Withdrawal

As an AOR, you can do all of the above and the following:

- Initiate a Proposal Withdrawal
- Submit a Proposal Withdrawal
- Submit a Proposal Withdrawal forwarded by a PI to NSF

Withdraw a Proposal as SPO

As an SPO, you have these options for withdrawing a proposal:

- Edit/Save a Proposal Withdrawal
- Delete a saved Proposal Withdrawal

As an AOR, you can do all of the above and the following:

- Initiate a Proposal Withdrawal
- Submit a Proposal Withdrawal
- Submit a Proposal Withdrawal forwarded by a PI to NSF

Initiate a Proposal Withdrawal as an AOR

1. On the **FastLane Home Page** screen, log in as an SPO to Research Administration (see SPO/AOR Login). The **Research Administration** screen displays (Figure 1).

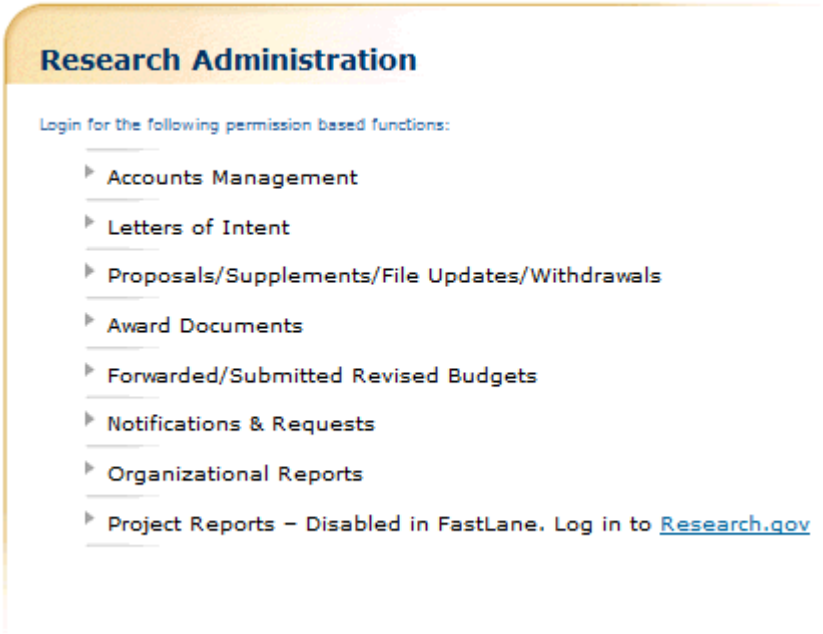

Figure 1 Research Administration screen. The Proposals/Supplements/File Updates/Withdrawals link is circled.

2. Click **Proposals/Supplements/ File Updates/Withdrawals** (Figure 1). The **Proposals/Supplements/File Updates/Withdrawals** screen displays on the **Documents in Progress** tab (Figure 2).

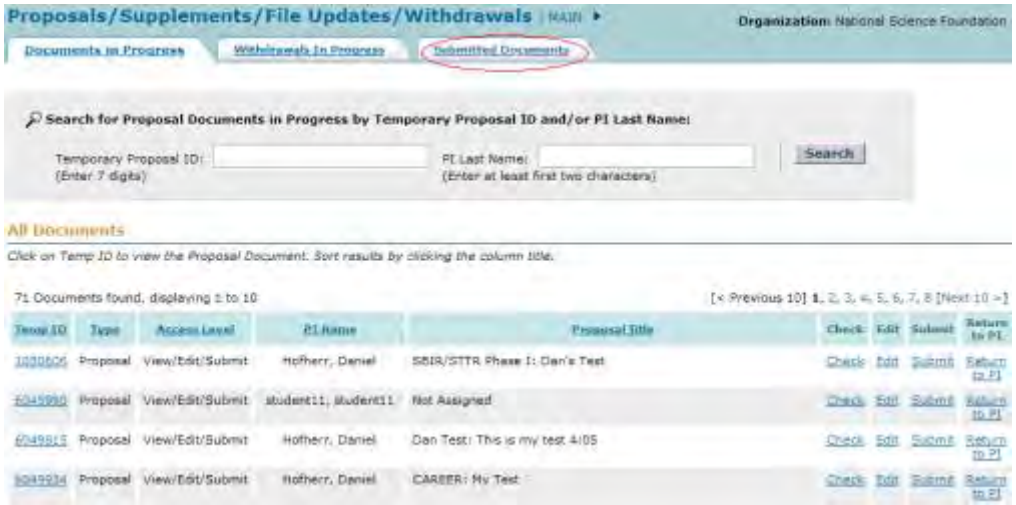

Figure 2 Proposals/Withdrawals/File Updates/Withdrawals screen on the Documents in Progress tab. The Submitted Documents tab is circled.

3. Click the **Submitted Documents** tab (Figure 2). The **Proposals / Withdrawals / File Updates / Withdrawals** screen displays on the **Submitted Documents** tab (Figure 3) with a list of submitted proposals.

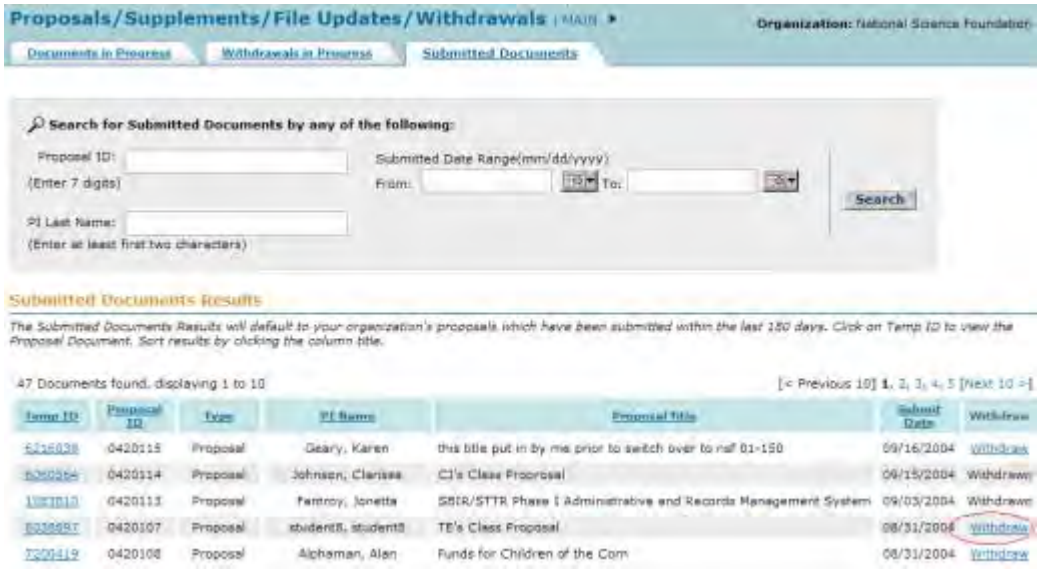

Figure 3 Proposals / Withdrawals / File Updates / Withdrawals screen on the Submitted Documents tab. The Withdraw link is circled.

4. Click **Withdraw** (Figure 3) on the row for the proposal you want to withdraw. The **Proposal Withdrawal** screen displays (Figure 4).

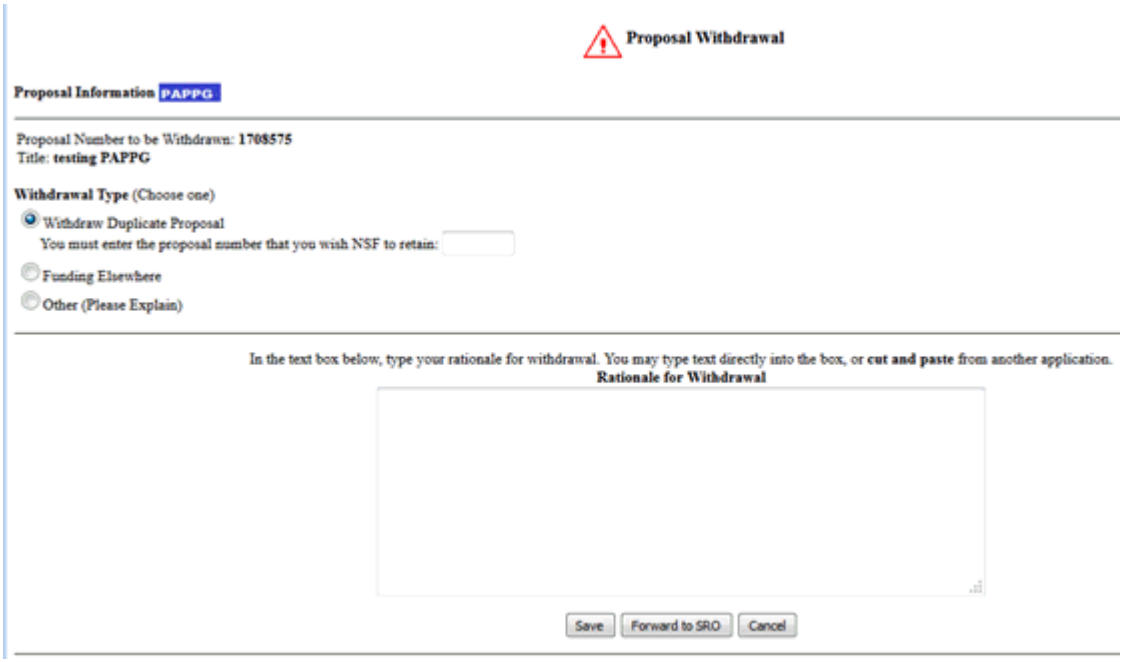

Figure 4 Proposal Withdrawal screen.

5. Select the **Withdrawal Type** by clicking the radio button (Figure 4) for one of the following:
   - **Withdraw Duplicate Proposal**
     Type in the box the Proposal Number for the temporary proposal you wish NSF to retain.
   - **Funding Elsewhere**
   - **Other**
6. In the **Rationale for Withdrawal** text box (Figure 4), type or copy and paste a detailed reason or reasons for withdrawing the proposal.
7. To submit the Proposal Withdrawal to NSF, see Submit a Proposal Withdrawal to NSF, Step 3. Or, *if you do not want to submit the Withdrawal request immediately to NSF,* you can save the Proposal Withdrawal (Save a Proposal Withdrawal, Step 4).

If you select a non-lead or lead proposal of a collaborative proposal to withdraw, a screen displays (Figure 5) with a message for you to confirm that you want to continue to withdraw the collaborative proposal.

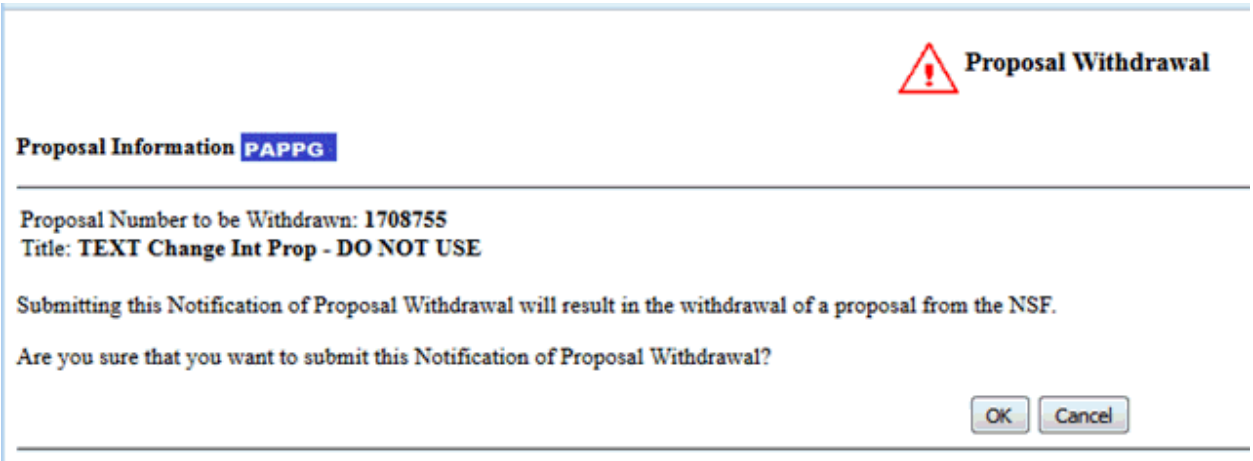

Figure 5 Warning screen for withdrawal of collaborative proposals.

1. Click the **Yes** button (Figure 5). The **Proposal Withdrawal** screen displays (Figure 4).
2. Go to Step 6 above and proceed to complete the Proposal Withdrawal.

Save a Proposal Withdrawal as an SPO/AOR

1. Access the **Proposal Withdrawal** screen (Figure 1) (see Initiate a Proposal Withdrawal, Step 1 through Step 4).

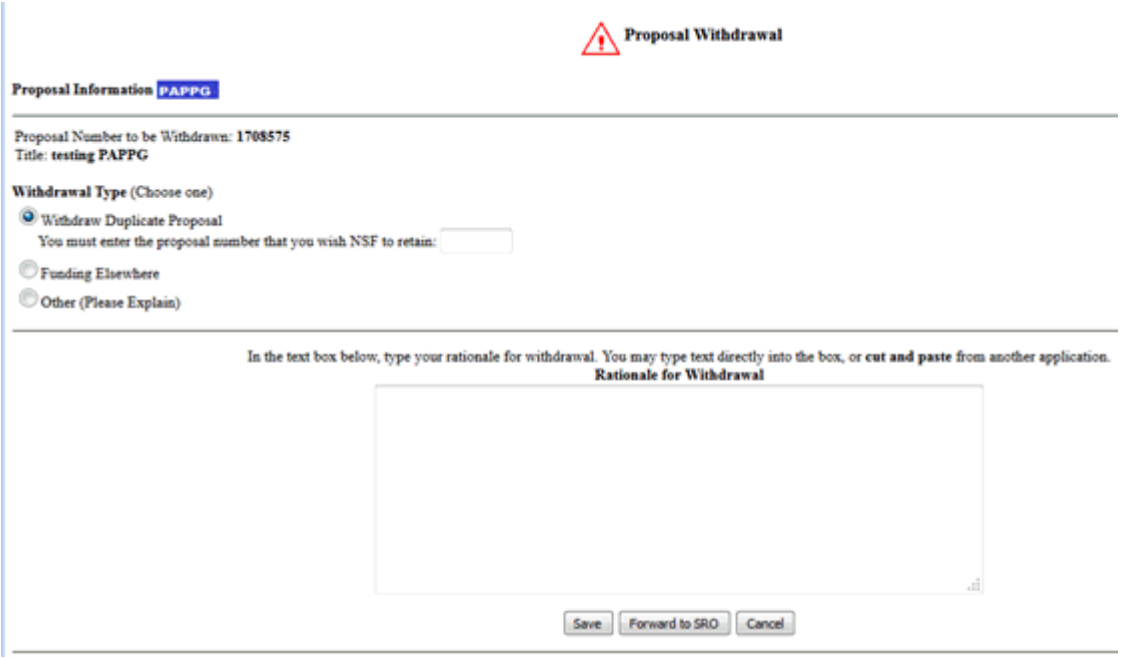

Figure 1 Proposal Withdrawal screen. The Save button is circled.

2. Select the **Withdrawal Type** by clicking on the radio button for either one of the following (Figure 1):
   - **Withdraw Duplicate Proposal**
     Type in the box the Proposal Number for the temporary proposal you wish NSF to retain.
   - **Funding Elsewhere**
   - **Other**
3. In the **Rationale for Withdrawal** text box in the lower portion of the **Proposal Withdrawal** screen (Figure 1), type or copy and paste a detailed reason or reasons for withdrawing the proposal.
4. Click the **Save** button (Figure 1). The **Your Notification Was Saved Successfully** screen displays (Figure 2) with the message that the request was saved.

Figure 2 Your Notification Was Saved Successfully screen.

5. Click the **Return to SPO Submission** button (Figure 2). The **Proposals / Supplements / File Updates / Withdrawals** screen displays on the **Submitted Documents** tab (Figure 3).

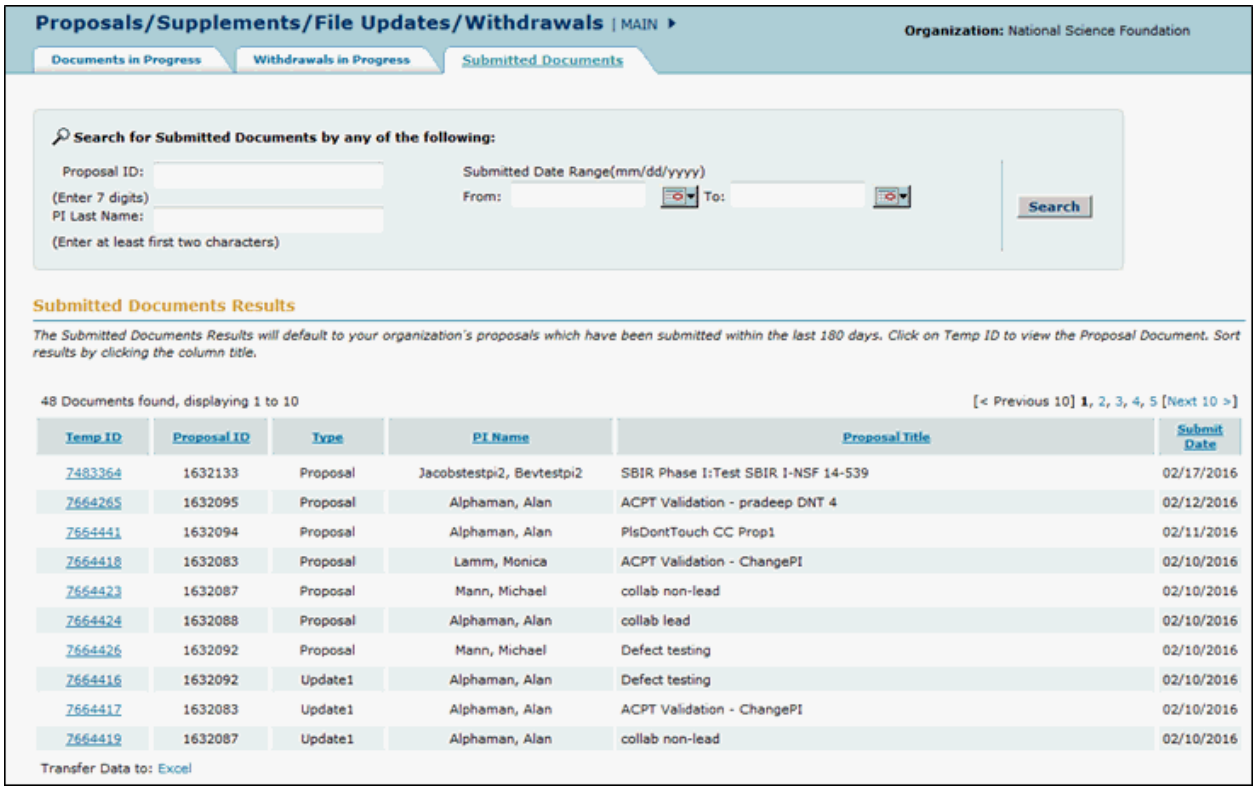

Figure 3 Proposals / Supplements / File Updates / Withdrawals screen on the Submitted Documents tab.

6. To work on the saved Proposal Withdrawal again, on the **Proposals / Supplements / File Updates / Withdrawals** screen on the **Documents in progress** tab (Figure 3), click the **Edit** icon on the row of the proposal. The **Proposal Withdrawal** screen displays (Figure 1) with the saved Proposal Withdrawal.

Submit a Proposal Withdrawal (AOR only)

1. Access the **Proposals / Supplements / File Updates / Withdrawals** screen on the **Submitted Documents** tab (Figure 1) (see Initiate a Proposal Withdrawal, Step 1 through Step 3).

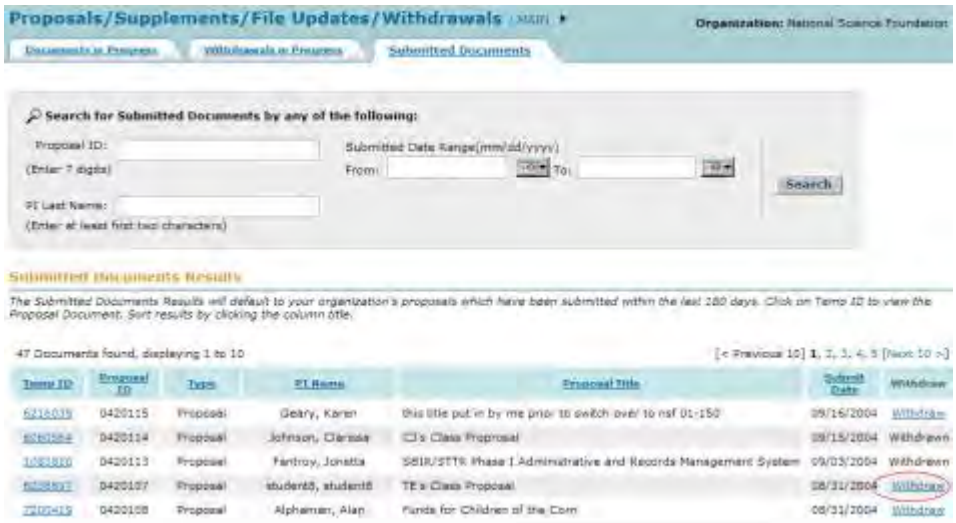

Figure 1 Proposals/Supplements/File Updates/Withdrawals screen on the Submitted Documents tab. The Withdraw link is circled.

2. Click **Withdraw** on the row for the proposal you saved a Proposal Withdrawal for (Figure 1). The **Proposal Withdrawal** screen displays (Figure 2) with the Proposal Withdrawal.

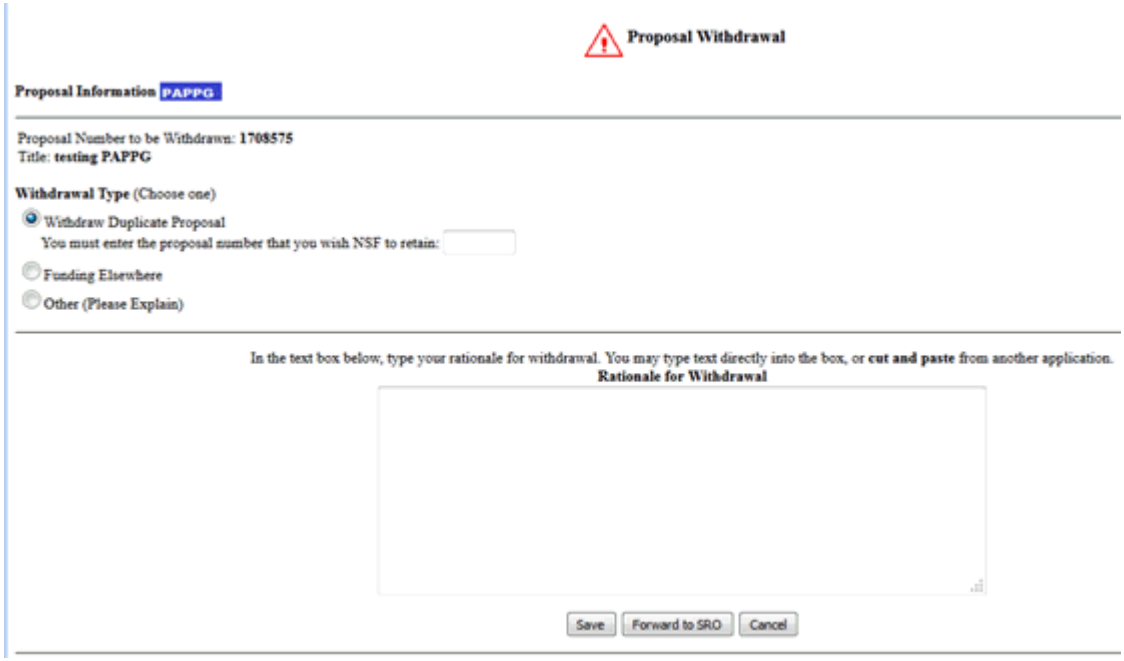

Figure 2 Proposal Withdrawal screen. The Submit button is circled.

3. Click the **Submit** button (Figure 2) to submit the Proposal Withdrawal to NSF. A screen displays (Figure 3) with a message for you to confirm that you want to submit the Proposal Withdrawal to NSF.

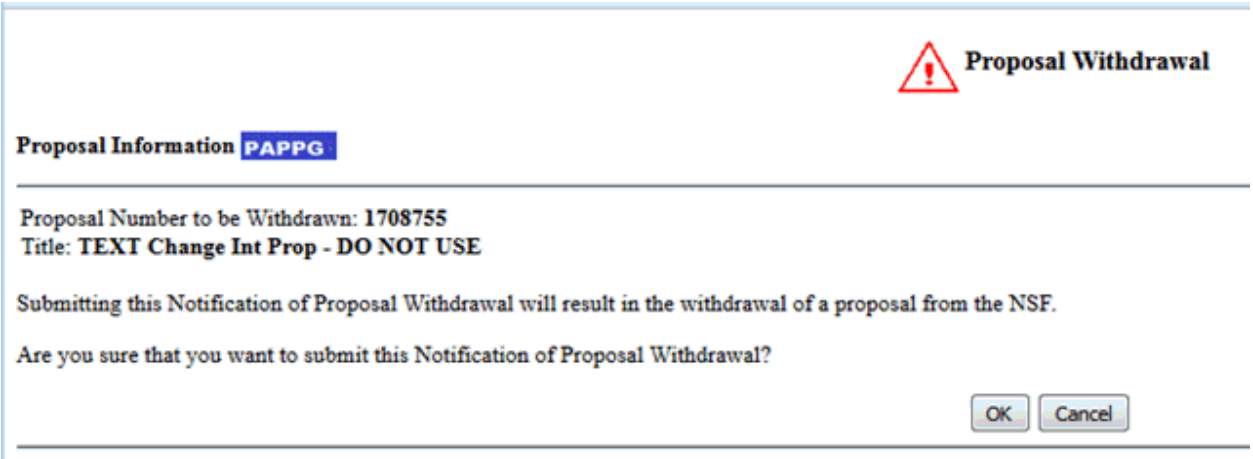

Figure 3 Screen with message for you to confirm that you want to submit the Proposal Withdrawal to NSF.

4. Click the **OK** button (Figure 3). The **Proposal Withdrawal Successful** screen displays (Figure 4) with the message that the Proposal Withdrawal has been submitted to NSF.

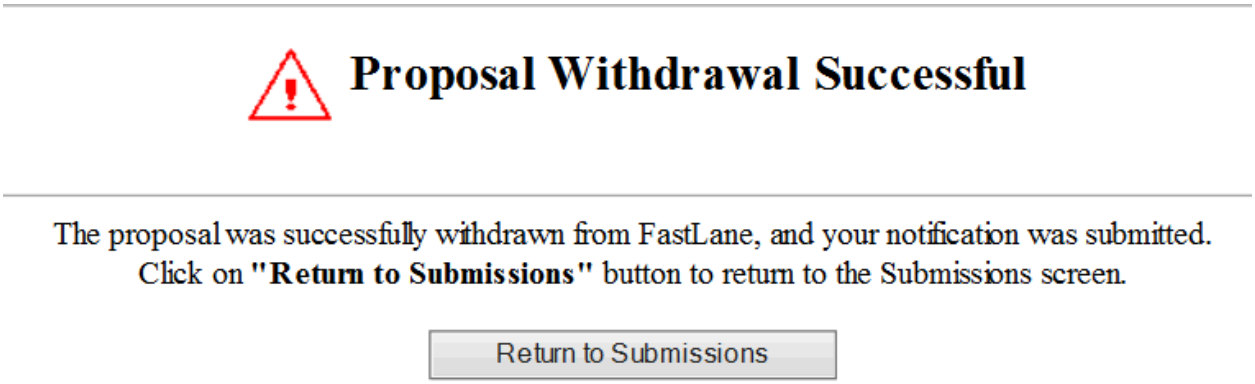

Figure 4 Proposal Withdrawal Successful screen.

5. Click the **Return to Submissions** button (Figure 4). The **Proposals / Supplements / File Updates / Withdrawals** screen displays on the **Submitted Documents** tab (Figure 1).

If you selected a non-lead or lead proposal of a collaborative proposal to withdraw, when you click the **Submit** button (Figure 2), a screen displays (Figure 5) with a message for you to confirm that you want to submit the Proposal Withdrawal for a collaborative proposal.

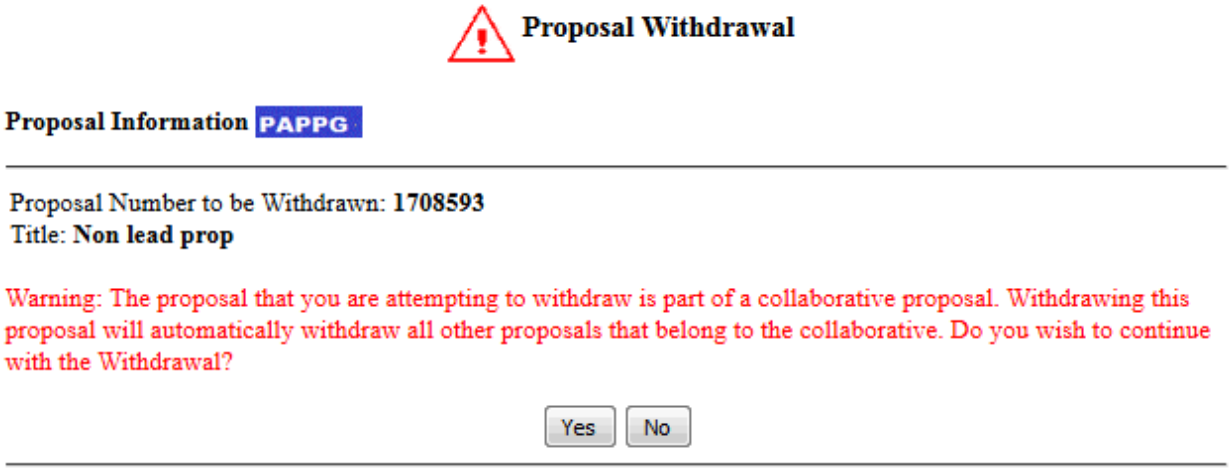

Figure 5 Screen with message for you to confirm that you want to withdraw a proposal that is part of a collaborative proposal.

1. Click the **OK** button (Figure 5). The **Proposal Withdrawal Successful** screen displays with the message that the Proposal Withdrawal has been submitted to NSF.
2. Click the **Return to Submission** button (Figure 4). The **Proposals / Supplements / File Updates / Withdrawals** screen displays on the **Submitted Documents** tab (Figure 1).

Delete a Saved Proposal Withdrawal as an SPO/AOR

1. Access the **Proposals / Supplements / File Updates / Withdrawals** screen on the **Submitted Documents** tab (Figure 1) (see Initiate a Proposal Withdrawal, Step 1 through Step 3).

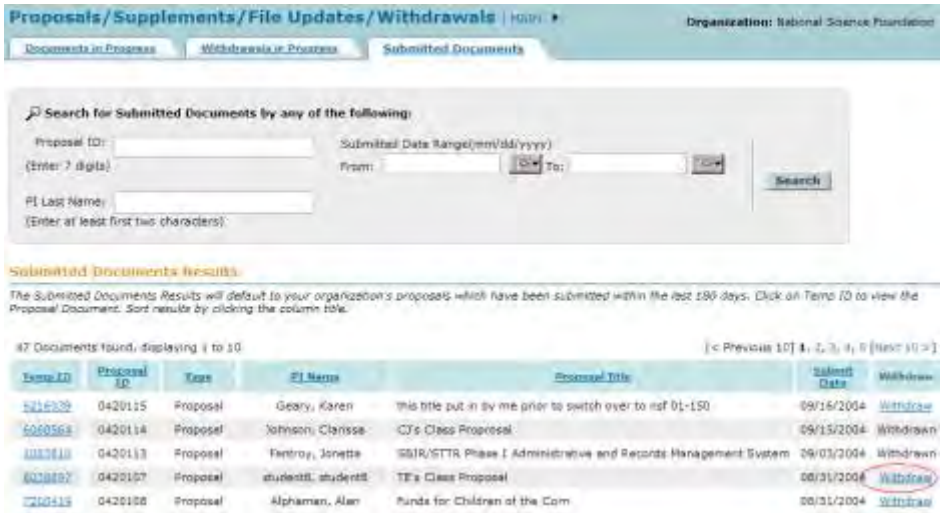

Figure 1 Proposals / Supplements / File Updates / Withdrawals screen on the Submitted Documents tab. The Withdraw button is circled.

2. Click **Withdraw** on the row of the proposal that you saved a Proposal Withdrawal for (Figure 1). The **Proposal Withdrawal** screen displays (Figure 2) with the Proposal Withdrawal.

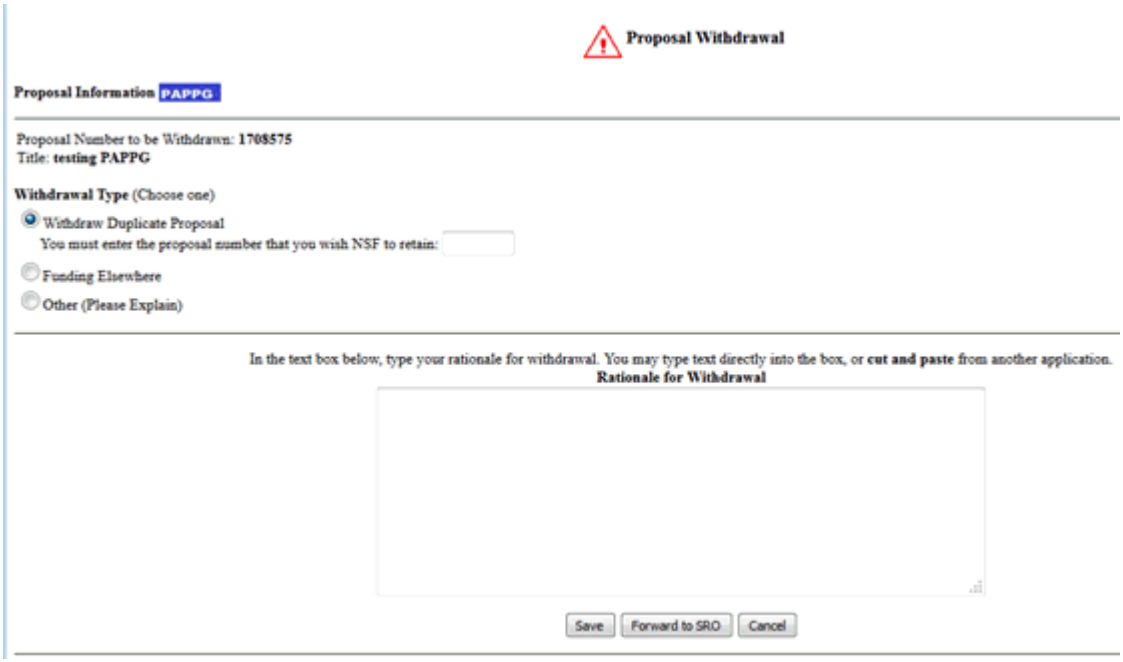

Figure 2 Proposal Withdrawal screen. The Delete button is circled.

3. Click the **Delete** button (Figure 2). The **Your Notification Was Deleted** screen displays (Figure 3) with the message that the Proposal Withdrawal was removed from FastLane.

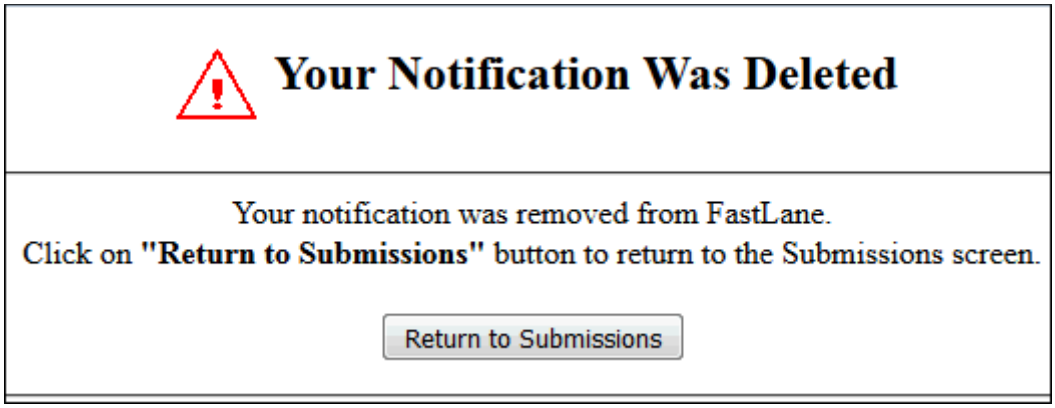

Figure 3 Your Notification Was Deleted screen.

4. Click the **Return to SPO Submission** button (Figure 3). The **Proposals/Supplements/File Updates/Withdrawals** screen displays on the **Submitted Documents** tab (Figure 1). You still have the option of initiating a new Proposal Withdrawal.

Submit a Proposal Withdrawal Forwarded by a PI

1. Access the **Proposals / Supplements / File Updates / Withdrawals** screen on the **Documents in Progress** tab (Figure 1) (see Initiate a Proposal Withdrawal, Step 1 through Step 2).

Figure 1 Proposals / Supplements / File Updates / Withdrawals screen on the Documents in Progress tab. The Withdrawals in Progress tab is circled.

2. Click the **Withdrawals in Progress** tab (Figure 1). The **Proposals / Supplements / File Updates / Withdrawals** screen displays on the **Withdrawals in Progress** tab (Figure 2).

Figure 2 Proposals / Supplements / File Updates / Withdrawals screen on the Withdrawals in Progress tab. The Edit link is circled.

3. Click **Edit** on the row for the Proposal Withdrawal that you want to submit (Figure 2). The **Proposal Withdrawal** screen displays (Figure 3) with the PI's Proposal Withdrawal.

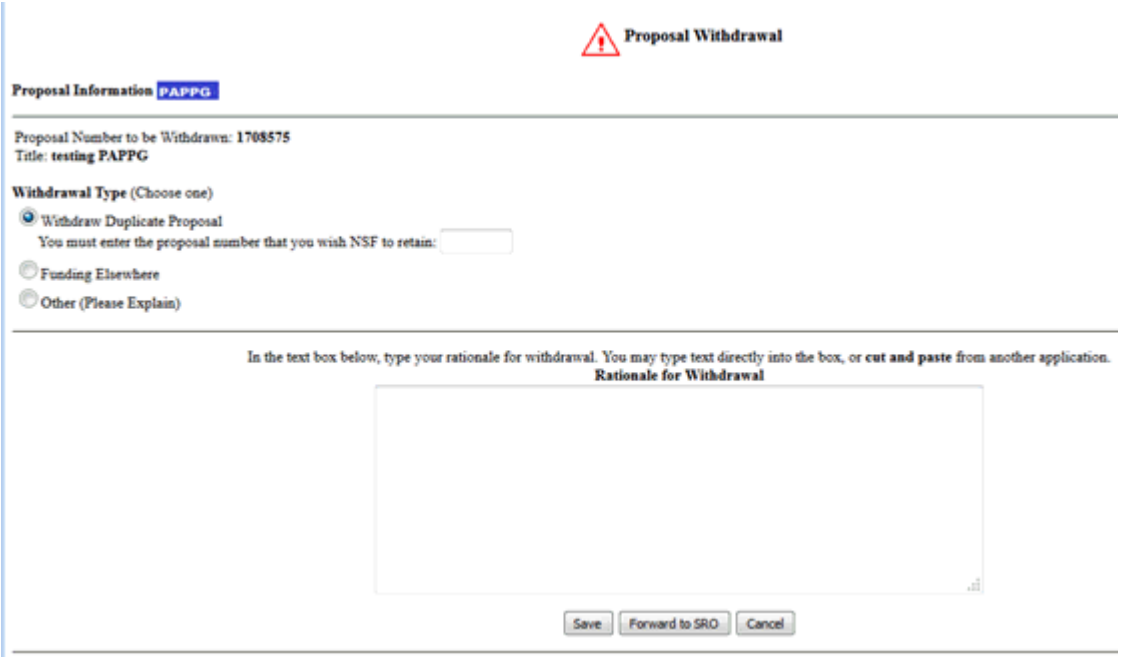

Figure 3 Proposal Withdrawal screen. The Submit button is circled.

4. You may edit the Proposal Withdrawal. For instructions, see Initiate a Proposal Withdrawal, Step 5 through Step 7.
5. To submit the Proposal Withdrawal, click the **Submit** button (Figure 3). A screen displays (Figure 4) with a message for you to confirm that you want to submit the Proposal Withdrawal.

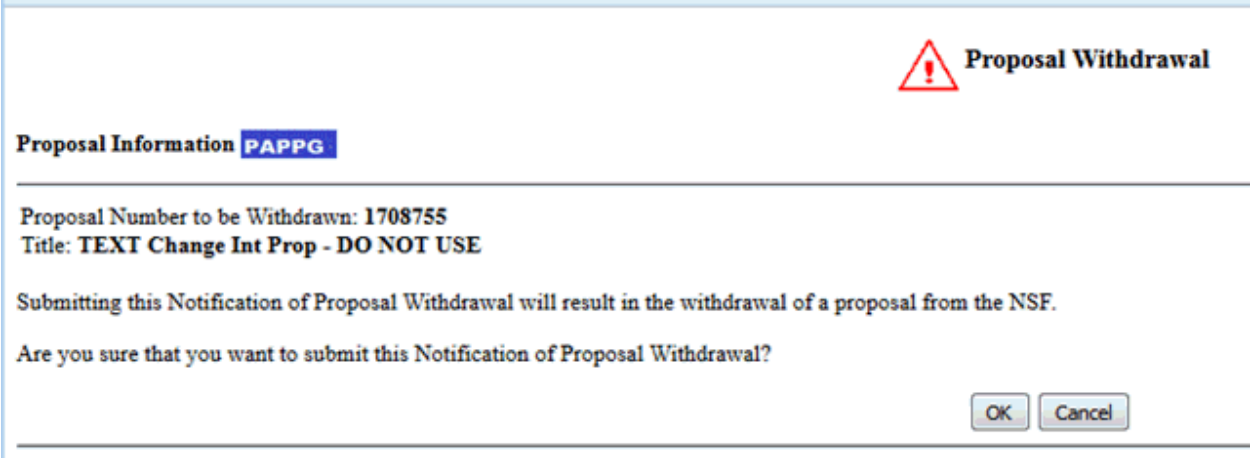

Figure 4 Screen with a message for you to confirm that you want to submit the Proposal Withdrawal to NSF. The OK button is circled.

6. Click the **OK** button (Figure 4). The **Proposal Withdrawal Successful** screen displays (Figure 5).

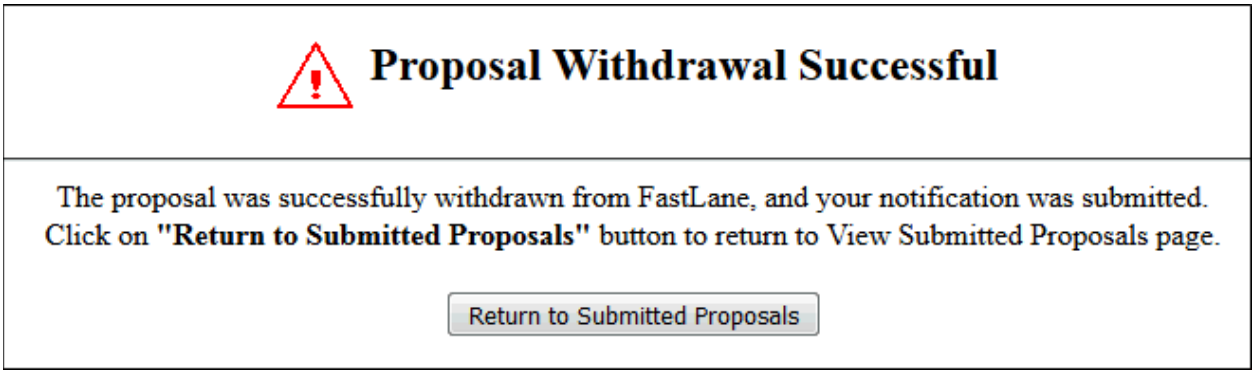

Figure 5 Proposal Withdrawal Successful screen.

7. Click the **Return to SPO Submission** button (Figure 5). The **Proposals/Supplements/File Updates/Withdrawals** screen displays on the **Withdrawals in Progress** tab.

Letters of Intent Introduction

Print the contents of the Letters of Intent book.

Some NSF program solicitations require or request submission of a letter of intent (LOI) in advance of submission of a full proposal. The predominant reason for its use is to help NSF program staff to gauge the size and range of the competition, enabling earlier selection and better management of reviewers and panelists. The requirement to submit an LOI will be identified in the program solicitation. Failure to submit a required LOI identified in a program solicitation may result in a full proposal not being accepted or returned without review. See PAPPG Chapter I.D.1 for further information.

You can create more than one Letter of Intent for a single program solicitation. However, a warning message displays that a Letter of Intent has already been submitted for that solicitation.

Roles

The PI can do the following:

- Create a Letter of Intent for any solicitation that has requested or required it
- Submit directly to the NSF Letters of Intent for certain types of solicitations
- Forward a Letter of Intent to the SPO for those types of solicitations that require AOR approval

The Sponsored Project Office (SPO)/ Authorized Organizational Representative (AOR) can do the following:

- Create a Letter of Intent for certain types of solicitations
- View all Letters of Intent created by PIs in their organization, including those the PI directly submitted to NSF
- Edit Letters of Intent forwarded by the PI
- Submit a Letter of Intent (AOR only)
- Return a Letter of Intent to a PI

To work on Letters of Intent, see one of the following for instructions:

- Create a Letter of Intent Introduction
- Work on Saved and Submitted Letters of Intent

Award Functions

Award Functions

Look to the FastLane Help System for Award Functions, if you are conducting award functions in one of these roles:

- Principal Investigator (PI)
- Co-PI (follow instructions for the PI)
- Sponsored Project Office (SPO)
- Authorized Organizational Representative (AOR)

FastLane Help for Award Functions covers these award activities:

- Prepare and Submit a Notification or Request
- Prepare and Submit a Supplemental Funding Request
- View and/or Print an Award Document
- Check the Continuation Funding Status for an Award

Award Functions

Look to the FastLane Help System for Award Functions, if you are conducting award functions in one of these roles:

- Principal Investigator (PI)
- Co-PI (follow instructions for the PI)
- Sponsored Project Office (SPO)
- Authorized Organizational Representative (AOR)

FastLane Help for Award Functions covers these award activities:

- Prepare and Submit a Notification or Request
- Prepare and Submit a Supplemental Funding Request
- View and/or Print an Award Document
- Check the Continuation Funding Status for an Award

Log In for Award Functions

Award Functions Login

Print the contents of the Log In for Award Functions book.

Log in to Award Functions by role:

- Principal Investigator (PI)
- Sponsored Project Office Representative (SPO)
- Sponsored Project Office Representative (AOR)

Award Functions Login

Print the contents of the Log In for Award Functions book.

Log in to Award Functions by role:

- Principal Investigator (PI)

- Sponsored Project Office Representative (SPO)
- Sponsored Project Office Representative (AOR)

Principal Investigator or Co-Principal Investigator Login to Award Functions

1. Use the General Log In procedure to log in to the system.

2. The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management** screen displays (Figure 1).

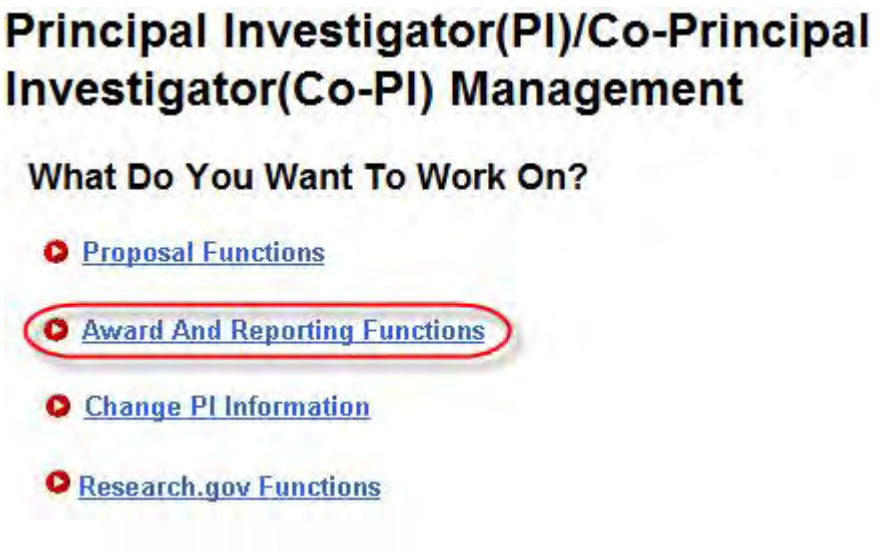

Figure 1 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management screen. The Award and Reporting Functions link is circled.

3. Click **Award and Reporting Functions** (Figure 1). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Award and Reporting Functions** screen displays (Figure 2).

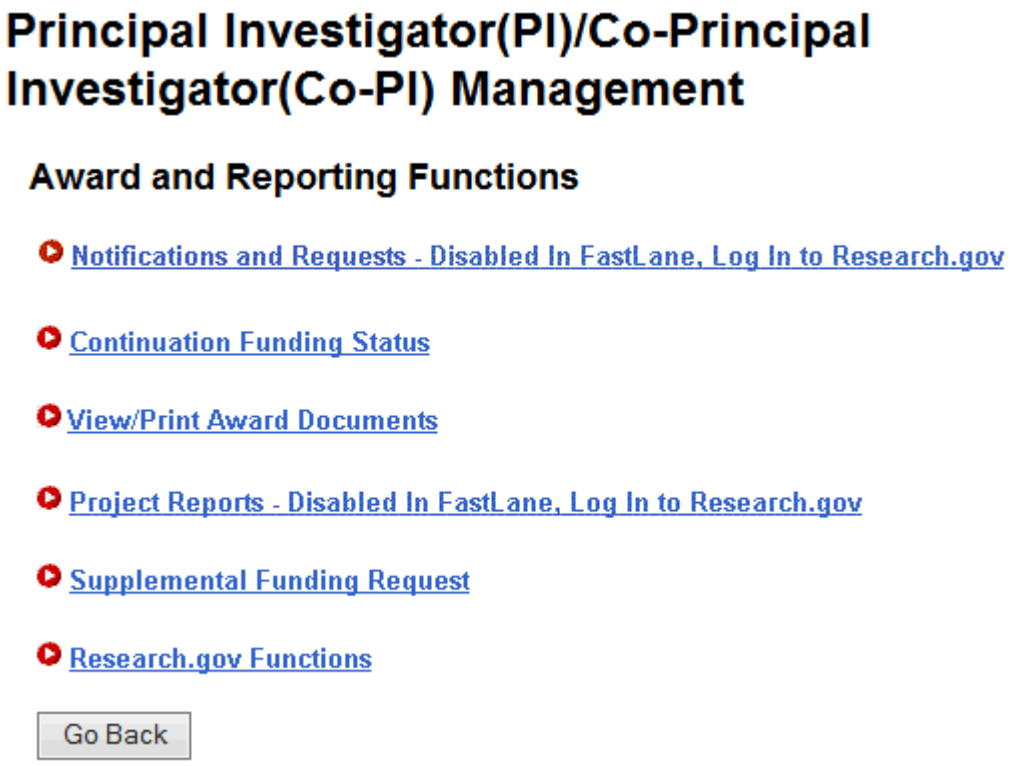

Figure 2 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Award and Reporting Functions screen.

Sponsored Project Office Representative Login to Award Functions

1. On the **FastLane Home Page** screen (Figure 1), click **Research Administration**. The **Research Administration** screen displays (Figure 2).

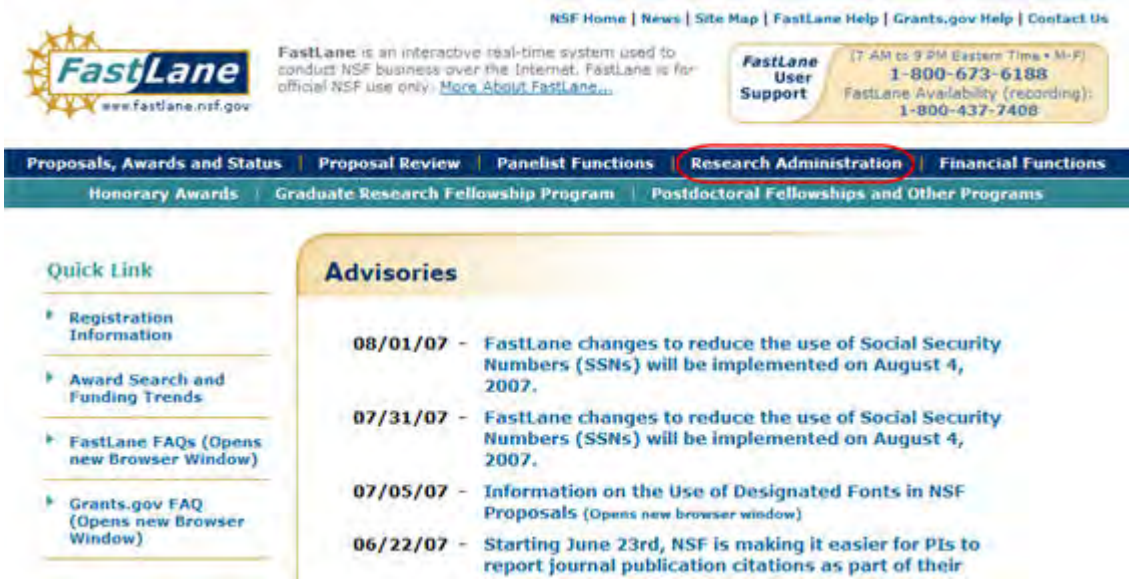

Figure 1 FastLane Home Page screen. The Research Administration link is circled.

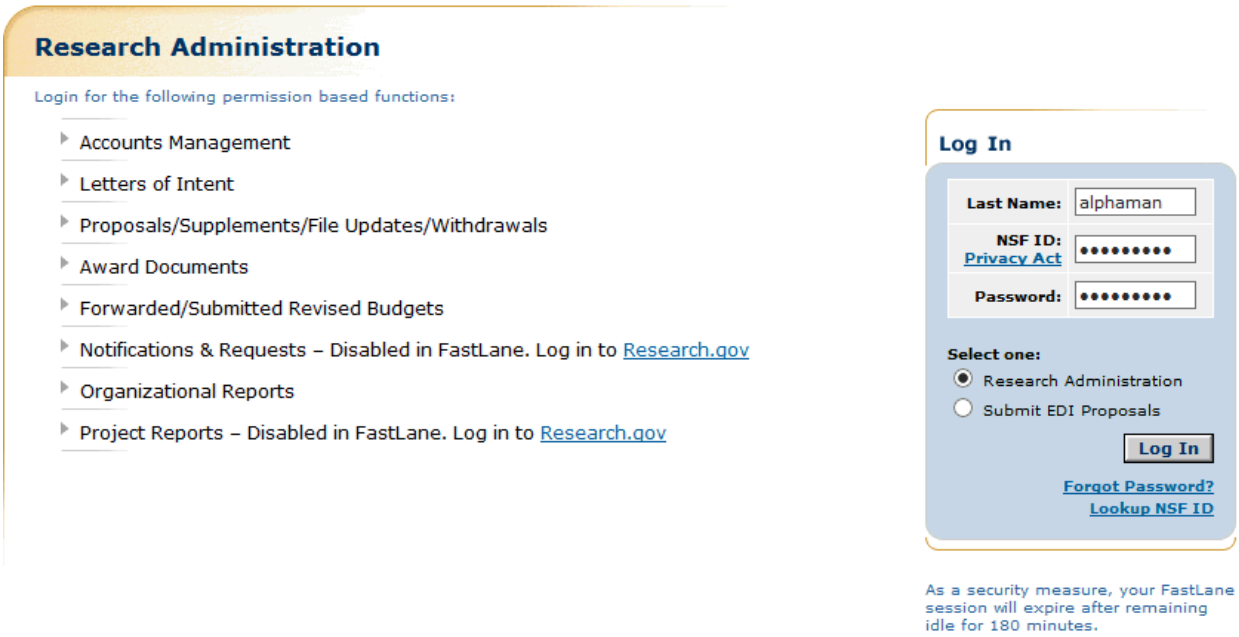

Figure 2 Research Administration screen. The Login section is circled.

2. In the **Last Name** box (Figure 2), type your last name.
3. In the **NSF ID** box (Figure 2), type your National Science Foundation Identification number (no spaces, no hyphens).
4. In the **Password** box (Figure 2), type your password.
5. Click the radio button for **Research Administration** (Figure 2).
6. Click the **Login** button (Figure 2). The **Research Administration** screen displays (Figure 3) with the following options for Awards Functions:

- Supplements in Proposals/Supplements/File Updates/Withdrawals
- Award Documents
- Notifications and Requests

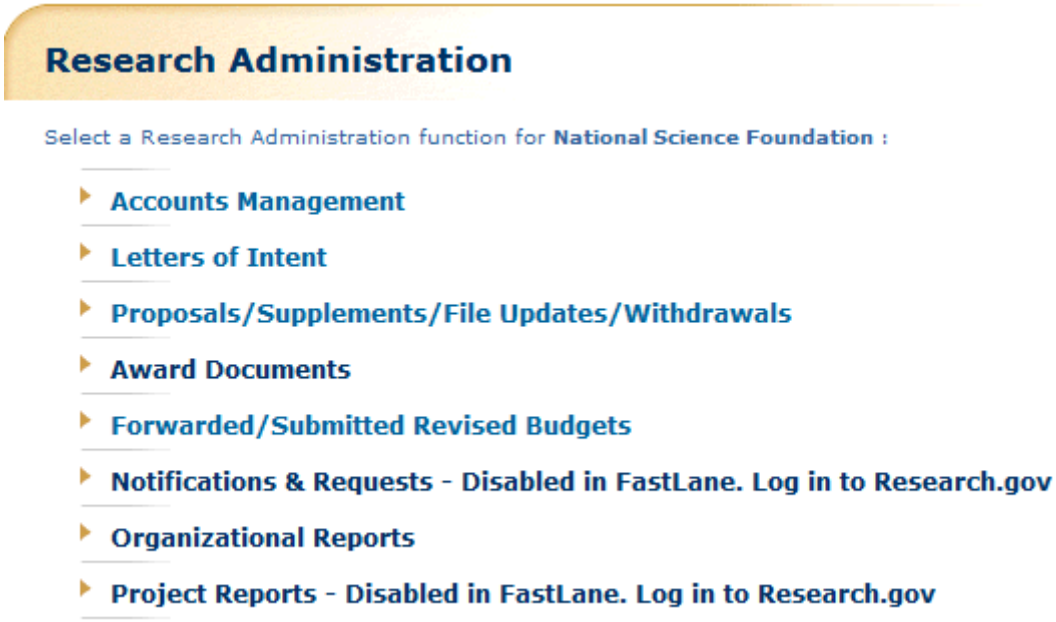

Figure 3 Research Administration screen.

Other Authorized User Login to Project Reports System and the Facilities Performance Reports System

1. On the **FastLane Homepage** screen (Figure 1), select **Proposals, Awards, and Status**. The **Proposals, Awards, and Status** screen displays (Figure 2).

Figure 1 FastLane Homepage screen. The Proposals, Awards, and Status link is circled.

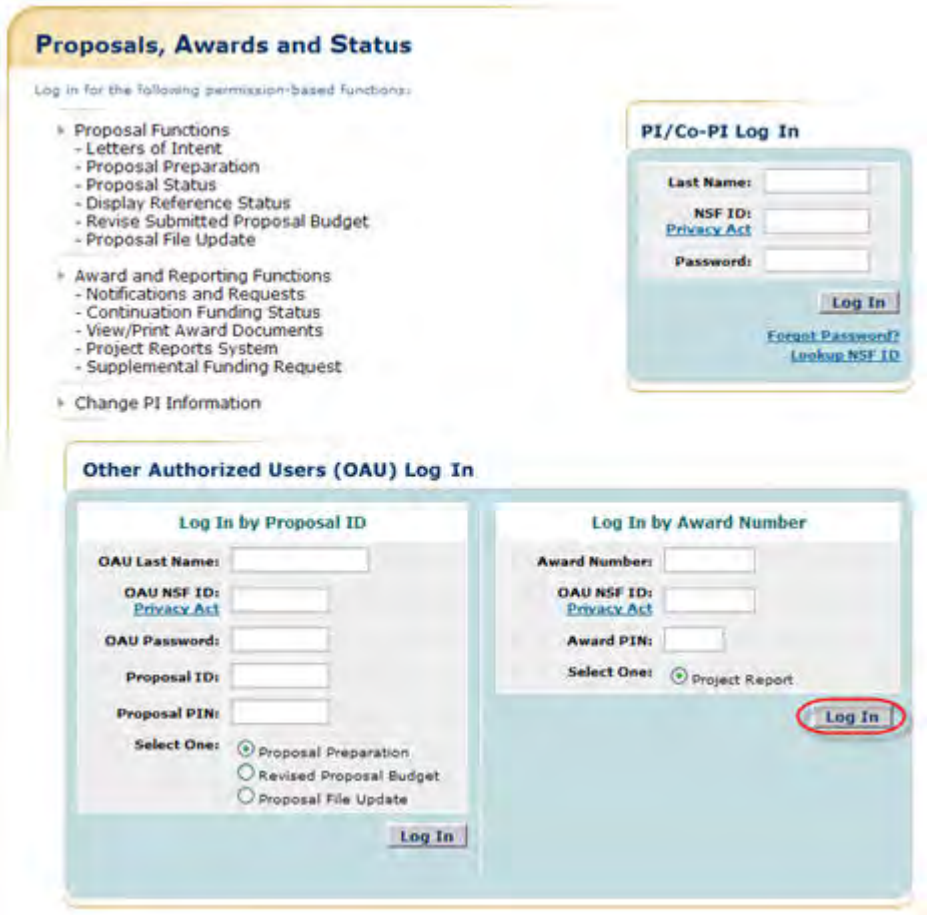

Figure 2 Proposals, Awards, and Status screen. The Log In button is circled.

2. In the **Log in by Award Number** section (Figure 2), do the following:
   - Type the Award Number in the **Award Number** box.
   - Type your National Science Foundation Identification number in the **OAU NSF ID** box.
   - Type the Award PIN in the **Award PIN** box.
   - Select the radio button for Project Report.
2. Select the **Log In** button (Figure 2). The **Rules of Behavior** screen displays (Figure 3).

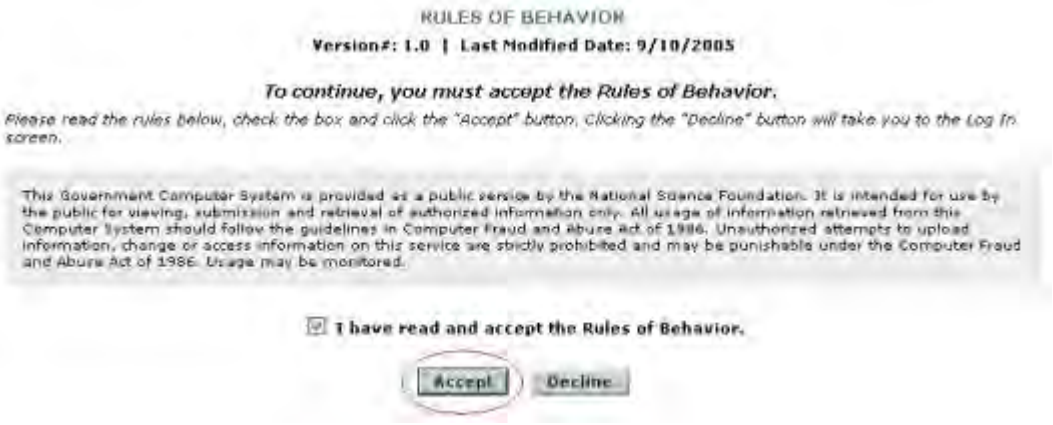

Figure 3 Rules of Behavior screen. The Accept button is circled.

3. Read the Rules of Behavior and click the check mark box for **I have read the Rules of Behavior** (Figure 3).
4. Select the **Accept** button (Figure 3). The **Project Reports System** screen displays on the **Annual/Final Project Reports** tab (Figure 4). You can do the following:
   - Work on an Annual or Final Project Report
   - Work on an Interim Report
   - Work on a GPRA Facilities Performance Report

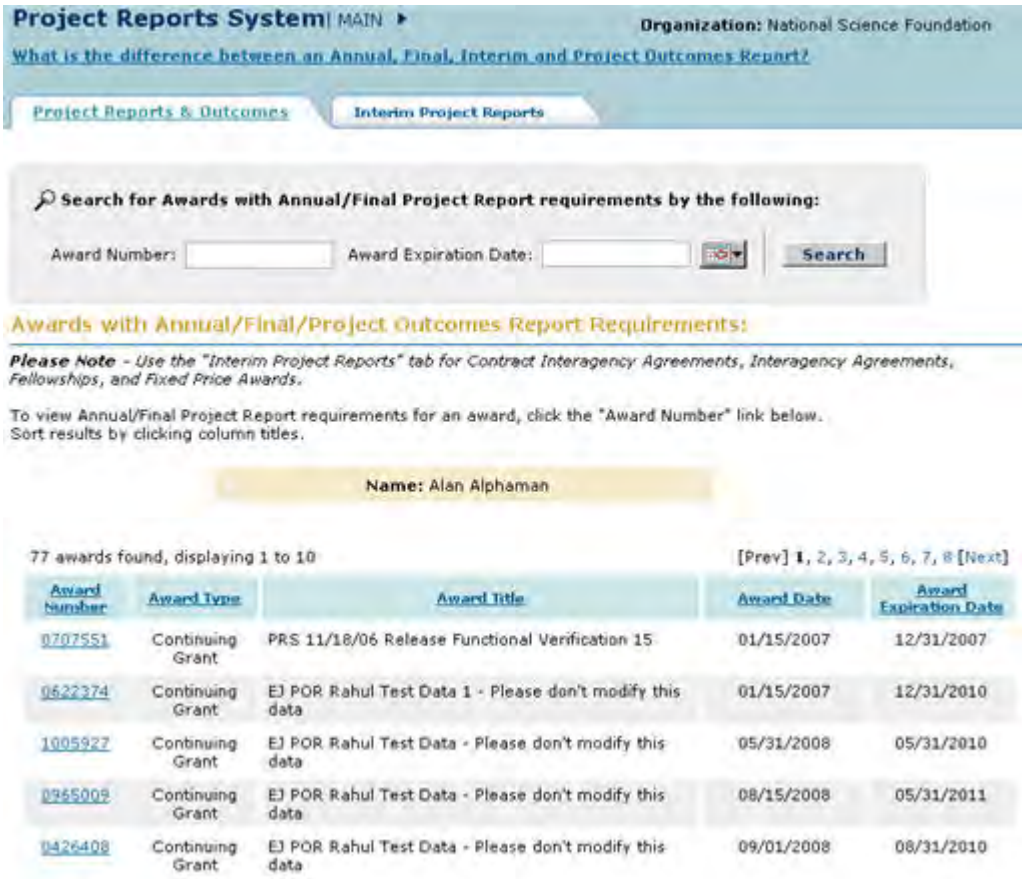

Figure 4 Project Reports System screen on the Annual/Final Project Reports tab.

Work on an Annual or Final Project Report

On the **Project Reports System** screen on the **Annual / Final Project Reports** tab (Figure 5), click the award number for the project. See Create or Edit an Annual or Final Report for instructions.

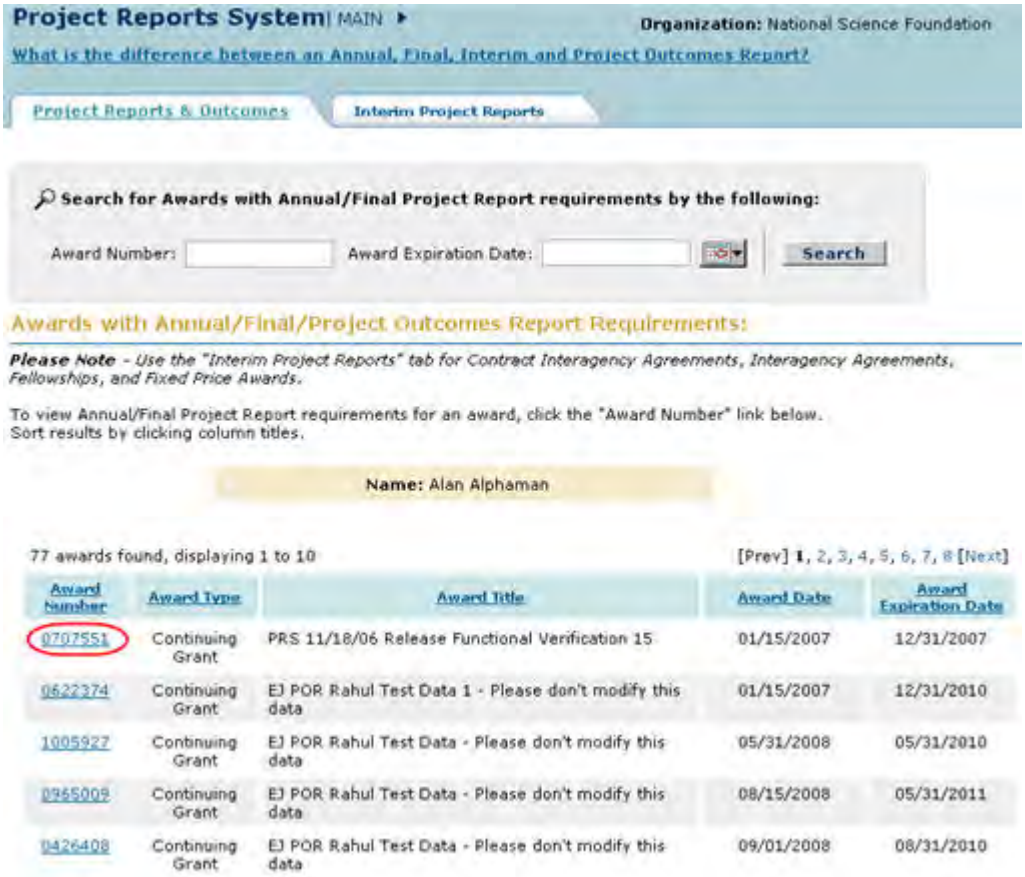

Figure 5 Project Reports System screen on the Annual / Final Project Reports tab. The award number is circled.

Work on an Interim Report

On the **Project Reports System** screen on the **Annual / Final Project Reports** tab (Figure 6), click the **Interim Project Reports** tab. See Work on an Interim Report, Step 2 and Step 3 and Create/Edit an Interim Report for instructions.

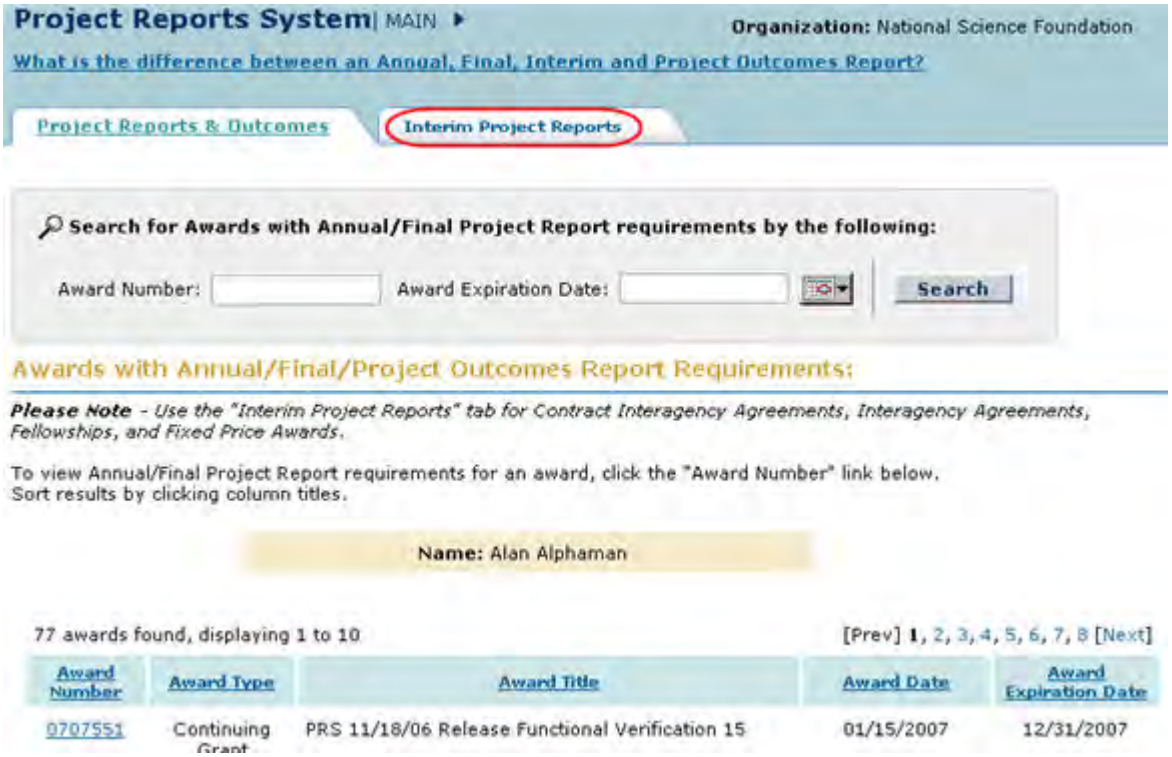

Figure 6 Project Reports System screen on the Annual/Final Project Reports tab. The Interim Project Reports tab is circled.

Work on a GPRA-Facilities Performance Report

If your award has GPRA-Facilities Reporting Requirements, the **Project Reports System** screen displays as in Figure 7, with a third tab for **GPRA-FPRS Reporting**.

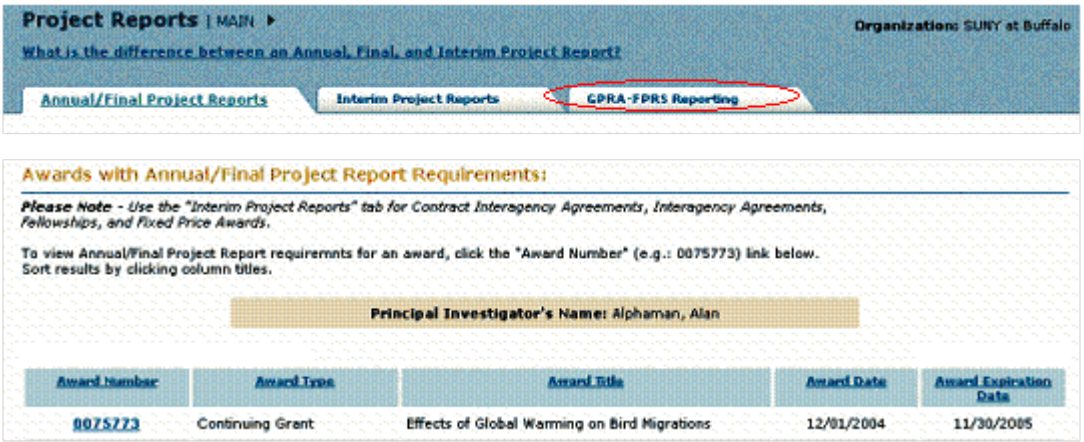

Figure 7 Project Reports screen on the Annual/Final Project Reports screen. The GPRA-FPRS Reporting tab is circled.

1. To work on a GPRA-Facilities Report, click the **GPRA-FPRS Reporting** tab (Figure 7). The **Awards with GPRA Facility Reporting Requirements** screen displays (Figure 8).

Figure 8 Awards with GPRA Facility Reporting Requirements screen. The award number is circled.

2. Select the award number link (Figure 8). The **Publicity, Patent Rights, and Privacy** screen displays (Figure 9).

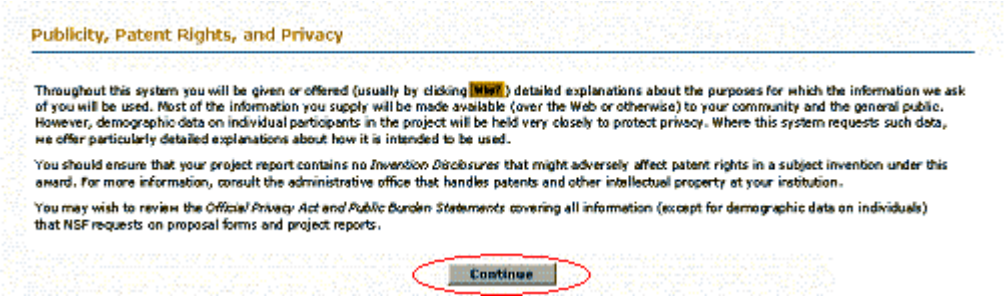

Figure 9 Publicity, Patent Rights, and Privacy screen.

3. Select the **Continue** button (Figure 6). The main **FPRS Splash screen** (Figure 10) displays, providing high-level information on the functions of FPRS with a link to FPRS reporting. See Introduction to NSF Facilities Performance System for instructions.

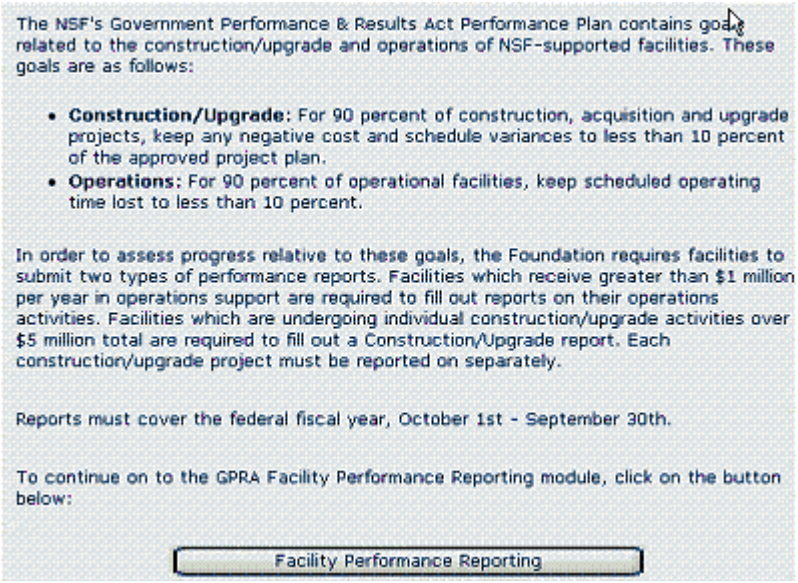

Figure 10 FPRS Splash screen.

Notifications and Requests

Notifications and Requests

FastLane's Notifications and Requests is an application you use during the period of an award. Through this application, you can prepare and submit to NSF:

- Required notifications
- Requests to NSF

(Notifications and Requests does *not* include the Supplemental Funding Request, which is in a separate application. See Supplemental Funding Request.)

Notifications and Requests is in the process of moving from FastLane to Research.gov. Some types of notifications and requests are only available in Research.gov. Please visit Research.gov Notifications and Requests for more information.

The roles that use Notifications and Requests are:

- The Principal Investigator (PIs) and Co-PIs (see PI Functions)
- The Sponsored Project Office (SPO) representative (see SPO Functions)
- The Authorized Organizational Representative (AOR)

Here are the different types of notifications and requests. Unless otherwise noted, you complete a notification or request by completing the screen displayed for that action. (**Note:** You cannot submit notifications or requests for an award with an approved Final Project Report or if your award has expired. Overdue Annual Project Reports and Final Project Reports will block further action on an award as well.) In the table below, click on the link for a notification or request to find the instructions for that action.+

See the *Award & Administration Guide (AAG)* Exhibit II-1 for detailed information on each type of notification and request.

Notifications	Special Notes	Requests	Special Notes
Annual and Final Cost Share Notification by Recipient	AOR only	Subawarding, Transferring or Contracting Out Part of an NSF Award	• Requires completion of more than one action • For the functions of this request, see the instructions for this action.
		PI/PD or co-PI/co-PD Transfer from One Organization to Another	• Requires AOR of both the new and original organizations • New AOR submits to NSF • Requires AOR permissions to submit • Requires completion of more than one action • For the functions of this request, see the instructions for this request.

		Change PI/PD and Add/Change co-PI/co_PD	• Requires AOR permissions to submit • Requires completion of more than one action. • For the functions of this request, see the instructions for this request. • Cannot be submitted if there is an overdue project report associated with the PI or Co-PIs on the award

Notifications and Requests

FastLane's Notifications and Requests is an application you use during the period of an award. Through this application, you can prepare and submit to NSF:

- Required notifications
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The roles that use Notifications and Requests are:

- The Principal Investigator (PIs) and Co-PIs (see PI Functions)
- The Sponsored Project Office (SPO) representative (see SPO Functions)
- The Authorized Organizational Representative (AOR)

Here are the different types of notifications and requests. Unless otherwise noted, you complete a notification or request by completing the screen displayed for that action. (**Note:** You cannot submit notifications or requests for an award with an approved Final Project Report or if your award has expired. Overdue Annual Project Reports and Final Project Reports will block further action on an award as well.) In the table below, click on the link for a notification or request to find the instructions for that action.+

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		PI/PD or co-PI/co-PD Transfer from One Organization to Another	• Requires AOR of both the new and original organizations • New AOR submits to NSF • Requires AOR permissions to submit • Requires completion of more than one action • For the functions of this request, see the instructions for this request.
		Change PI/PD and Add/Change co-PI/co_PD	• Requires AOR permissions to submit • Requires completion of more than one action. • For the functions of this request, see the instructions for this request. • Cannot be submitted if there is an overdue project report associated with the PI or Co-PIs on the award

PI Functions

Prepare a New Notification or Request as a PI

1. Access the **Notifications and Requests** screen on the **Prepared by PI** tab (Figure 1) (see Access Notifications and Requests as a PI). You must be on the **Prepared by PI** tab to prepare a new notification or request.

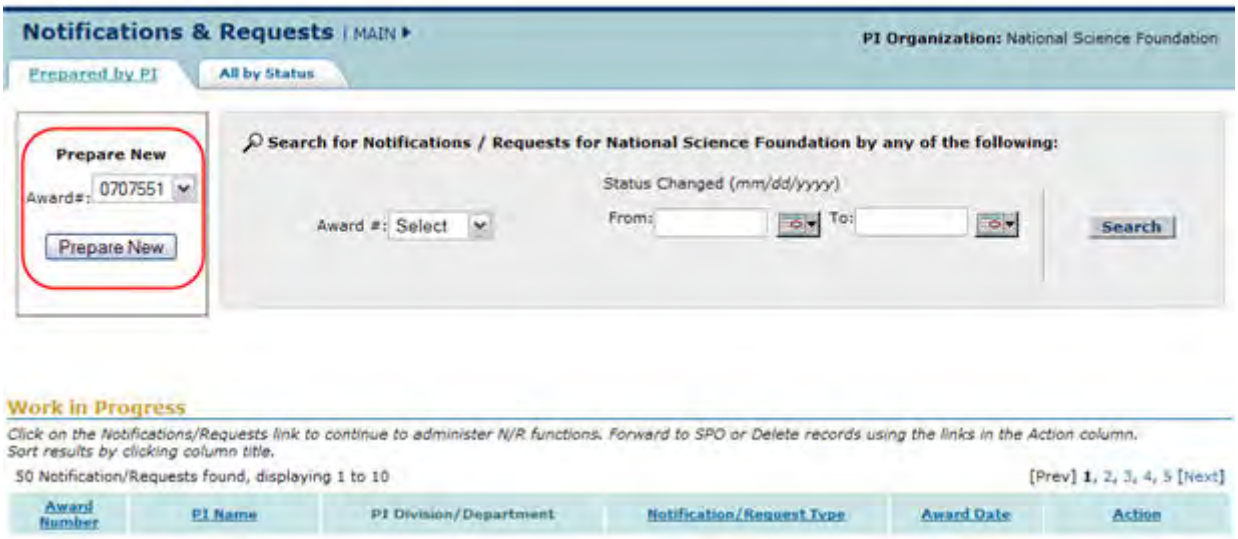

Figure 1 Notifications and Requests screen on the Prepared by PI tab. The Prepare New section is circled.

2. In the **Prepare New** section of the **Notifications and Requests** screen on the **Prepared by PI** tab (Figure 1), select the award number from the **Award #** drop-down list for the award you want to prepare a notification or request for.
3. Click the **Prepare New** button (Figure 1). The **Prepare a New Notification or Request** screen displays (Figure 2).

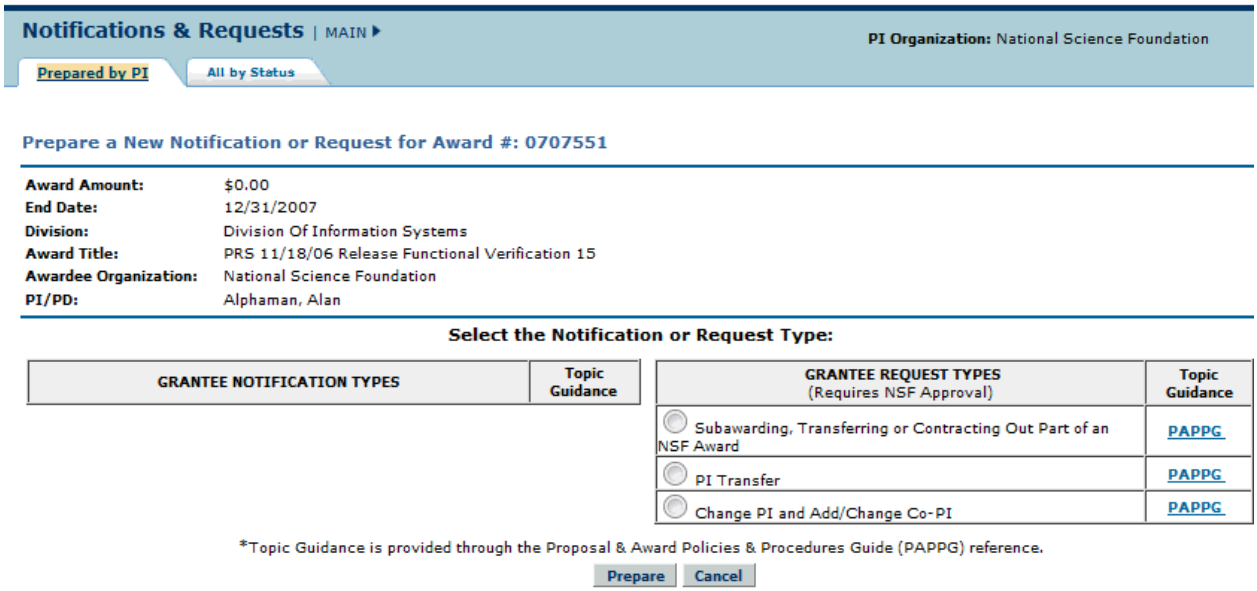

Figure 2 Prepare a New Notification or Request screen.

The screen lists the different types of Notifications and Requests you can prepare. Click on a form link below for instructions on preparing that form.

For requests, select from:

- Subawarding, Transferring or Contracting Out Part of an NSF Award
- Change PI/PD and Add/Change co-PI/co-PD

Prepare a New Notification or Request as a PI

1. Access the **Notifications and Requests** screen on the **Prepared by PI** tab (Figure 1) (see Access Notifications and Requests as a PI). You must be on the **Prepared by PI** tab to prepare a new notification or request.

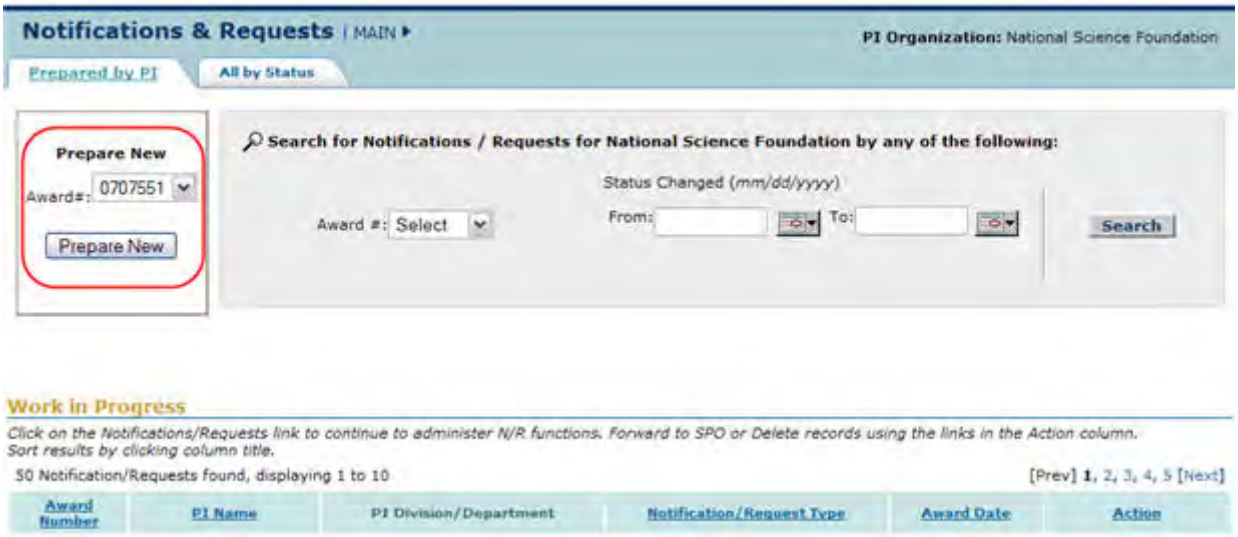

Figure 1 Notifications and Requests screen on the Prepared by PI tab. The Prepare New section is circled.

2. In the **Prepare New** section of the **Notifications and Requests** screen on the **Prepared by PI** tab (Figure 1), select the award number from the **Award #** drop-down list for the award you want to prepare a notification or request for.
3. Click the **Prepare New** button (Figure 1). The **Prepare a New Notification or Request** screen displays (Figure 2).

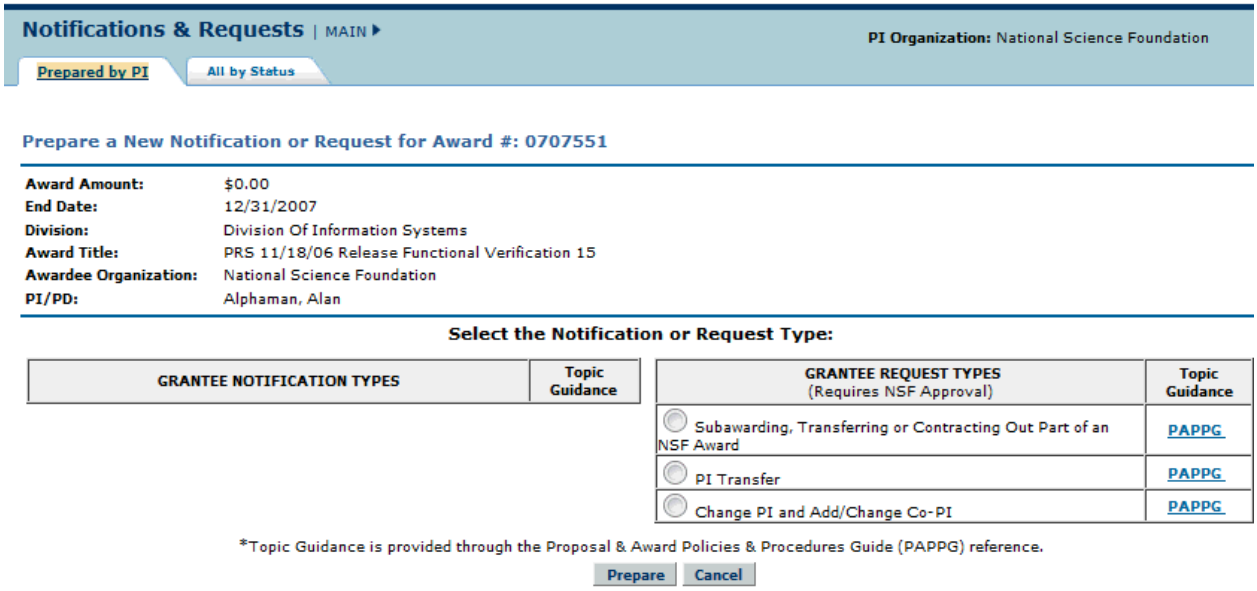

Figure 2 Prepare a New Notification or Request screen.

The screen lists the different types of Notifications and Requests you can prepare. Click on a form link below for instructions on preparing that form.

For requests, select from:

- Subawarding, Transferring or Contracting Out Part of an NSF Award
- Change PI/PD and Add/Change co-PI/co-PD

Access Notifications and Requests as a PI

1. On the **FastLane Home Page** screen, log in to Proposals, Awards, and Status as a PI or Co-PI (see PI Co-PI Login to Award Functions). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management** screen displays (Figure 1).

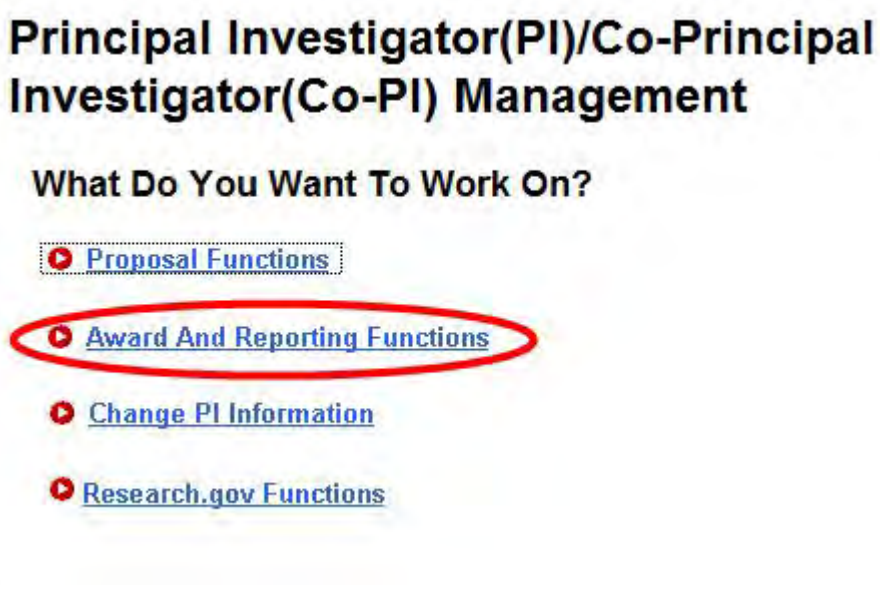

Figure 1 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management screen. The Award and Reporting Functions link is circled.

2. Click **Award and Reporting Functions** (Figure 1). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Award and Reporting Functions** screen displays (Figure 2).

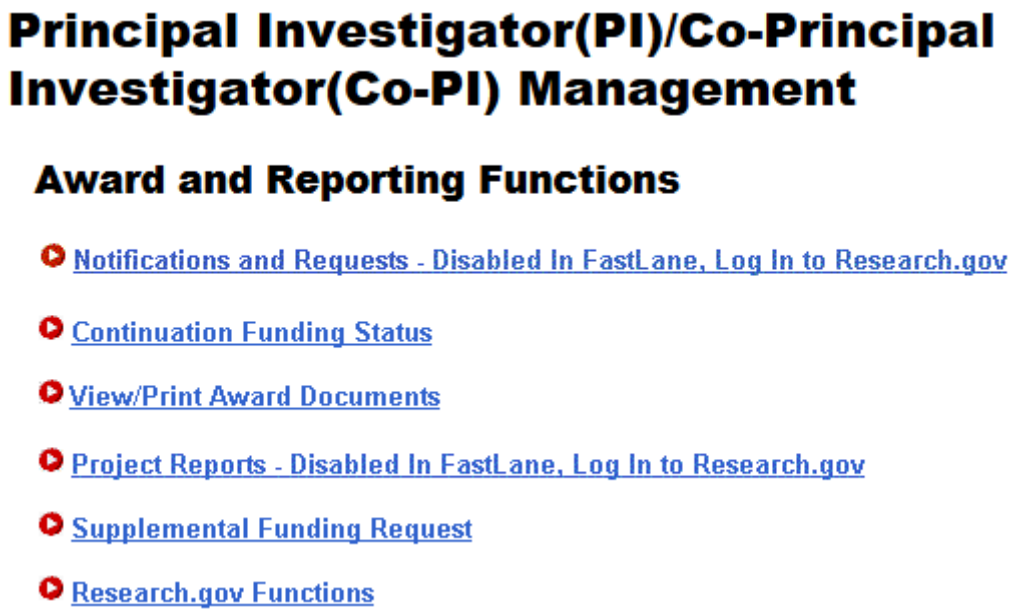

Figure 2 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Award and Reporting Functions screen. The Notifications and Requests link is circled.

3. On clicking the Notifications and Request Link, the user is routed to Research.gov. Upon logging into Research.gov the user will see the below screen to prepare a New notification/Request

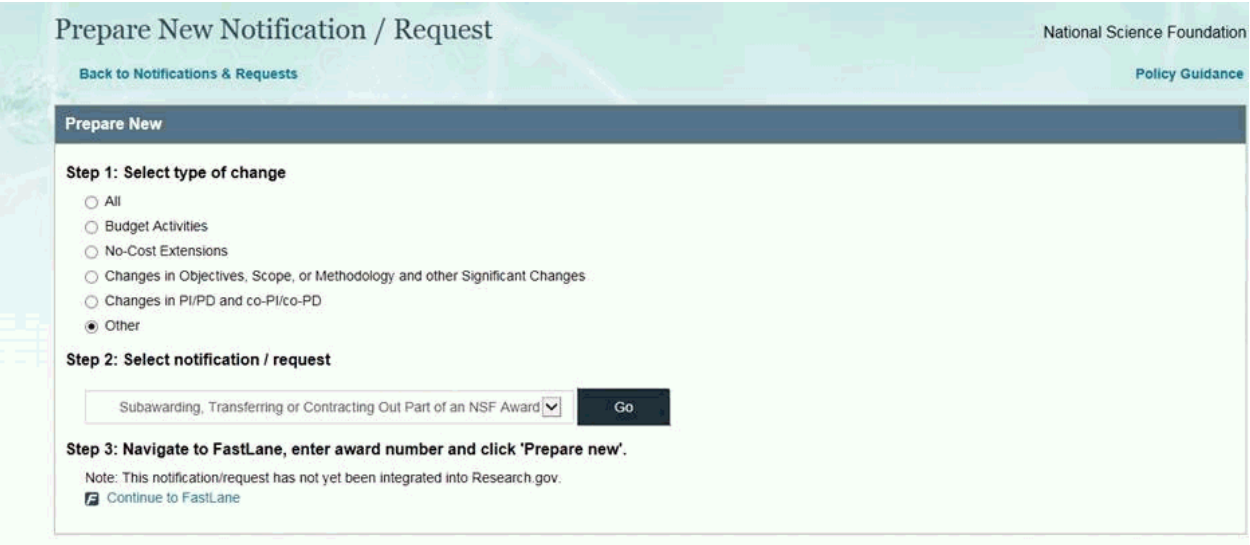

Figure 3 Research.gov Prepare new Notification/Request Screen.

4. The user will be routed to Fastlane for the following Notifications/Request:
    - Subawarding/Transferring Part of an NSF Award
    - Conflicts of Interest
    - PI Transfer
    - Change PI and Add/Change Co-PI

5. The **Notifications and Requests** screen displays on the **Prepared by PI** tab (Figure 4). There are two tabs on the Notifications and Requests screen:
    - **Prepared by PI** tab
      Prepare notifications and requests on this tab.
    - **All by Status** tab
      Check the status of notifications and requests that have already been initiated on this tab.

The **Notifications and Requests** screen displays first on the **Prepared by PI** tab.

Figure 4 Notifications and Requests screen on the Prepared by PI tab.

You have these options for working on Notifications and Requests:

- Prepare a new notification or request
- Search for notifications and requests
- View a notification or request
- Modify a notification or request
- Forward a notification or request to the SPO
- Delete a notification or request
- Check the status of a notification or request
- View a forwarded or submitted notification or request
- View the award amendment for an approved notification or request

(Click on a link above for instructions for that option.)

Prepare a New Notification or Request as a PI

1. Access the **Notifications and Requests** screen on the **Prepared by PI** tab (Figure 1) (see Access Notifications and Requests as a PI). You must be on the **Prepared by PI** tab to prepare a new notification or request.

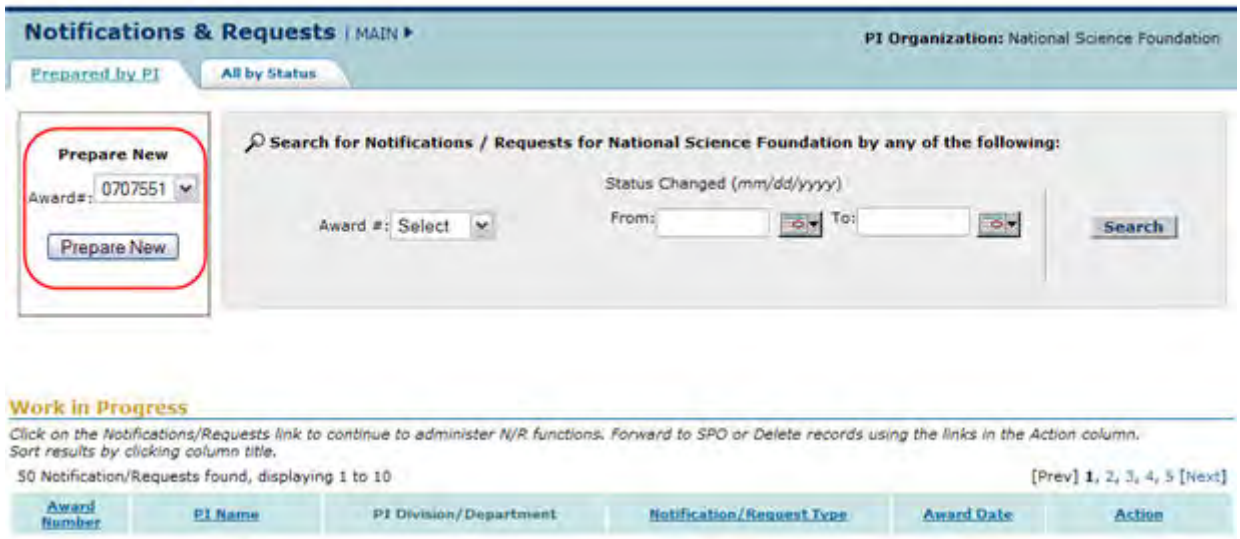

Figure 1 Notifications and Requests screen on the Prepared by PI tab. The Prepare New section is circled.

2. In the **Prepare New** section of the **Notifications and Requests** screen on the **Prepared by PI** tab (Figure 1), select the award number from the **Award #** drop-down list for the award you want to prepare a notification or request for.
3. Click the **Prepare New** button (Figure 1). The **Prepare a New Notification or Request** screen displays (Figure 2).

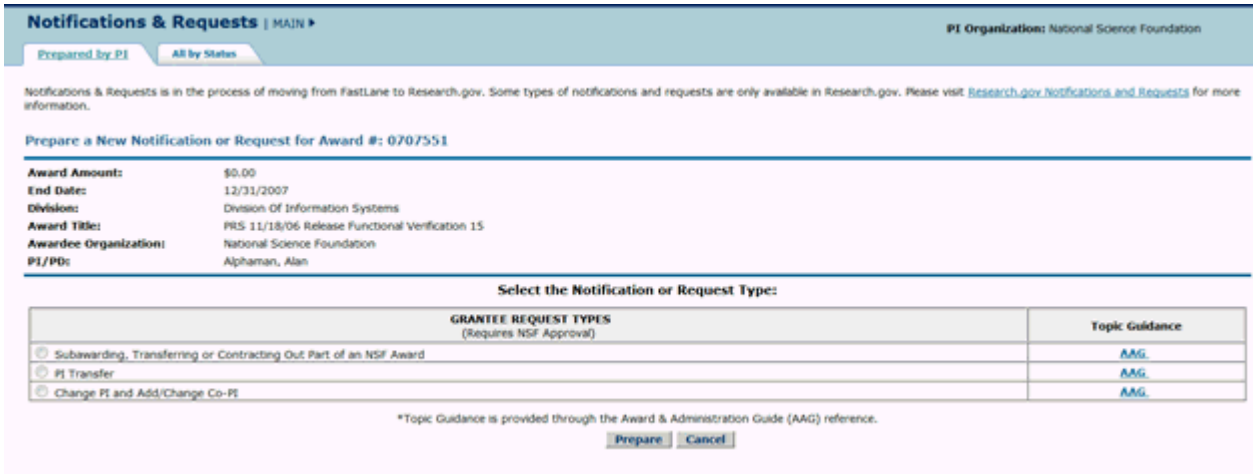

Figure 2 Prepare a New Notification or Request screen.

The screen lists the different types of Notifications and Requests you can prepare. Click on a form link below for instructions on preparing that form.

For requests, select from:

- Subawarding, Transferring or Contracting Out Part of an NSF Award
- PI/PD or co-PI/co-PD Transfer from one Organization to Another
- Change PI/PD and Add/Change co-PI/co-PD

Search for Notifications and Requests Prepared by the PI

1. Access the **Notifications and Requests** screen on the **Prepared by PI** screen (Figure 1) (see Access Notifications and Requests as a PI).

Figure 1 Notifications and Requests screen on the Prepared by PI tab. The Search for Notifications/Requests section and the Search button are circled.

2. In the **Search for Notifications/Requests** section of the **Notifications and Requests** screen (Figure 1), search for the notifications or requests by any of these criteria:
   - **Award number**
     Select the award number from the **Award #** drop-down list.
   - **Date range**
     - In the **From** box, type the start date for the search (in mm/dd/yyyy format).
     - In the **To** box, type the end date for the search (in mm/dd/yyyy format).
3. Click the **Search** button (Figure 1). The results of your search display in the **Work in Progress** section of the **Notifications and Requests** screen on the **Prepared by PI** tab (Figure 2).

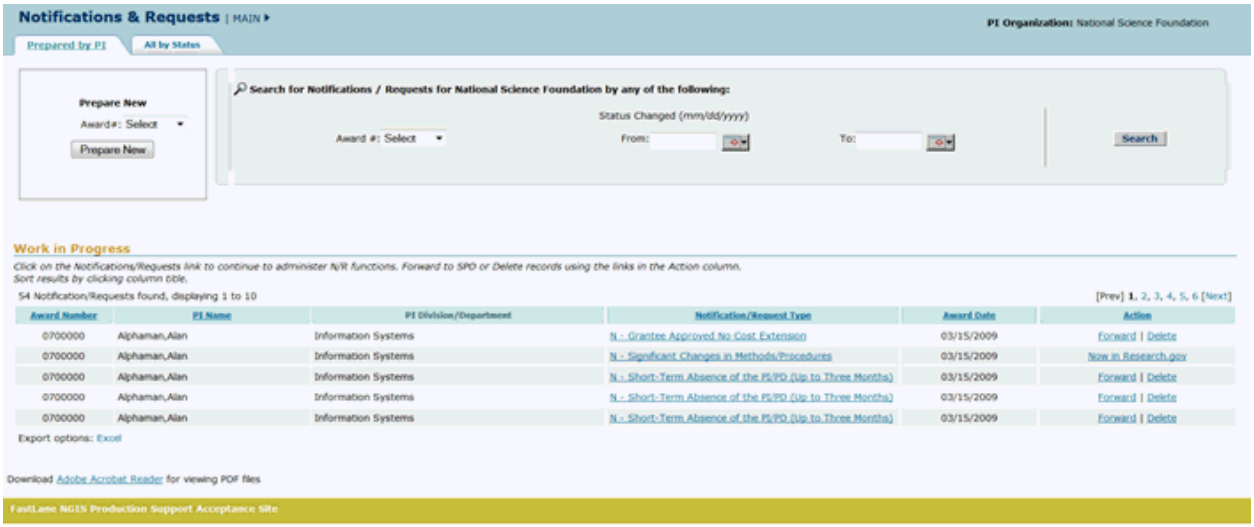

Figure 2 Notifications and Requests screen on the Prepared by PI tab. Work in Progress section.

4. Find the notification or request you want to work on. You have these options for working on notifications and requests that you have prepared:
   - View a notification or request
   - Modify a notification or request
   - Forward a notification or request to the SPO
   - Submit a notification to NSF prepared by the PI
   - Delete a notification or request

   (Click on a link above for instructions for that option.)

View a Notification or Request Prepared by the PI

1. Access the **Notifications and Requests** screen on the **Prepared by PI** tab (Figure 1) (see Access Notifications and Requests as a PI).

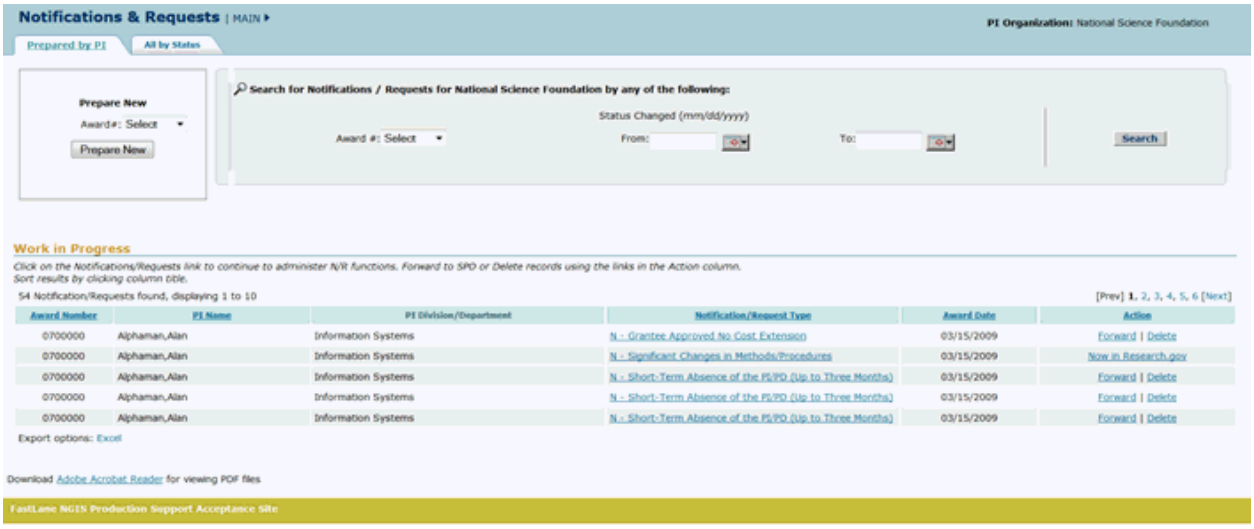

Figure 1 Notifications and Requests screen on the Prepared by PI tab. The Notification/Request Type link is circled for a notification.

2. In the **Work in Progress** section of the **Notifications and Requests** screen (Figure 1), click the **Notification/Request Type** link on the row for the notification (or request) you want to view. The **View Notification** screen displays (Figure 2) with the text of the notification. (The **View Request** screen displays if you are viewing a request.) You have these options on the **View Notification** (or **View Request**) screen (Figure 2):
   - Modify the notification or request
   - Forward the notification or request to the SPO
   - Submit the notification to NSF
   - Delete the notification or request

   (Click on a link above for instructions for that option.)

Figure 2 View Notification screen.

Modify a Notification or Request Prepared by the PI

1. Access the **View Request** or (**View Notification**) screen (Figure 1) (see View a Notification or Request Prepared by the PI).

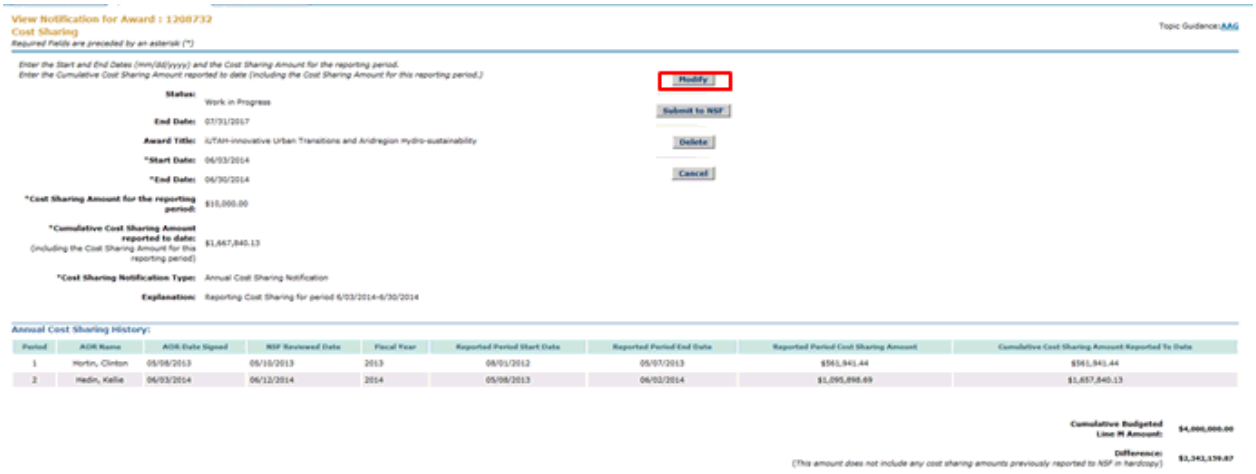

Figure 1 View Request screen.

2. On the **View Request** (or **View Notification**) screen (Figure 1), click the **Modify** button. The **Modify Request** (or **Modify Notification**) screen displays (Figure 2).

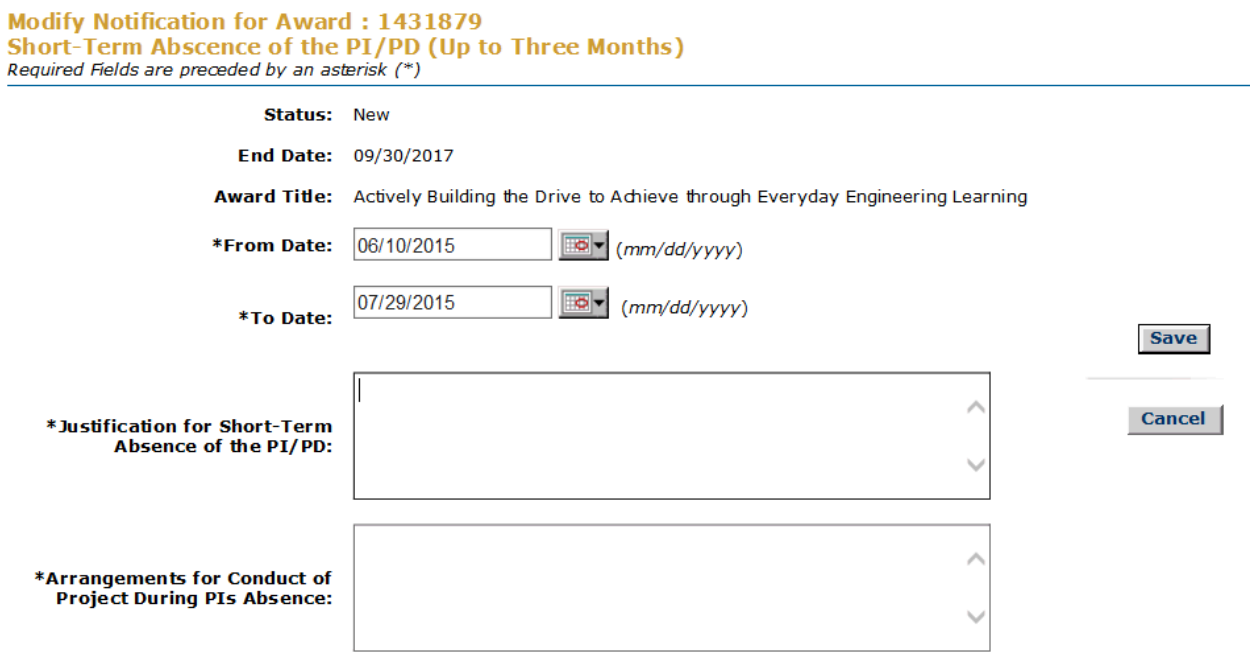

Figure 2 Modify Request screen. Select the Save button.

3. Modify the request as you require. Click on a link below for the instructions for the type of notification or request you are modifying:
   - *For notifications:*
     - Cost Sharing

   - *For requests*:
   - *For requests*:
     - Subawarding, Transferring, of Contracting Out Part of an NSF Award
     - PI Transfer
     - Change PI Add/Change co-PI
     -

4. Click the **Save** button (Figure 2). The **View Request** (or **View Notification**) screen displays (Figure 3) with the changed information.

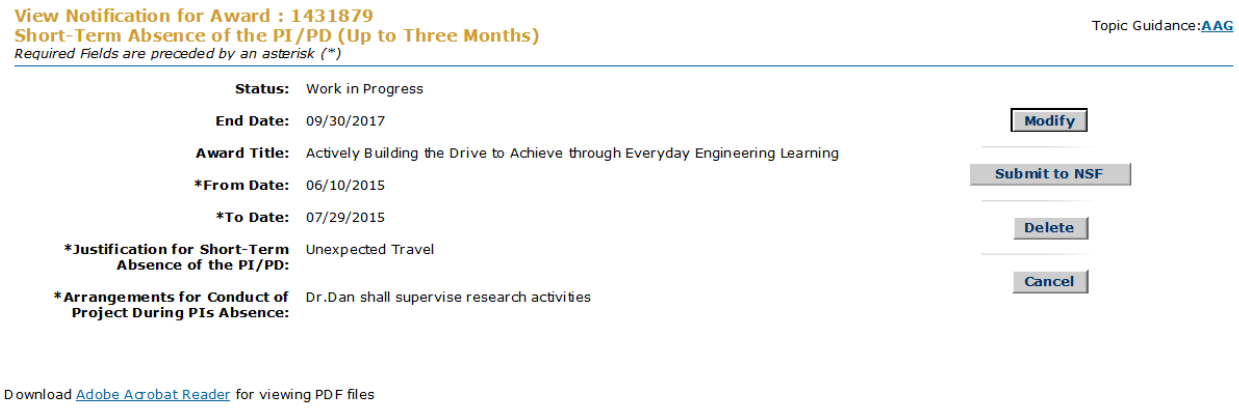

Figure 3 View Request screen with the modifications displayed.

Forward a Notification or Request to the SPO

1. Access the **Notifications and Requests** screen on the **Prepared by PI** tab (Figure 1) (see Access Notifications and Requests as a PI).

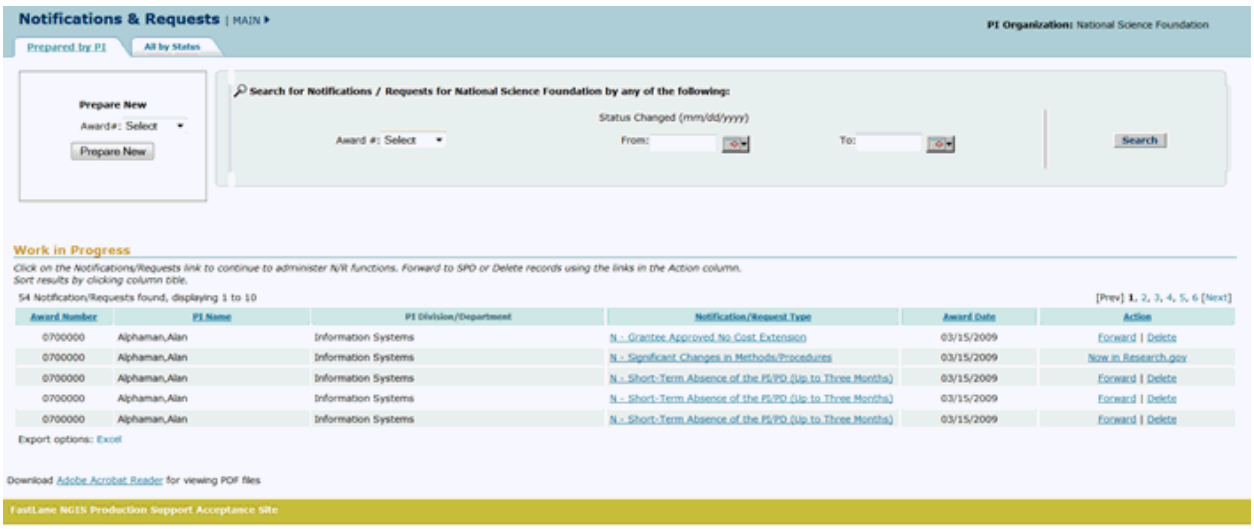

Figure 1 Notifications and Requests screen on the Prepared by PI tab. The Forward link is circled for a request.

2. In the **Work in Progress** section of the **Notifications and Requests** screen (Figure 1), click **Forward** in the row for the notification (or request) you want to forward to the SPO. The **Forward Notification** screen displays (Figure 2) with a message at the top for you to confirm that you want to forward the notification (or request) to NSF. (The **Forward Request** screen displays if you chose to forward a request.)

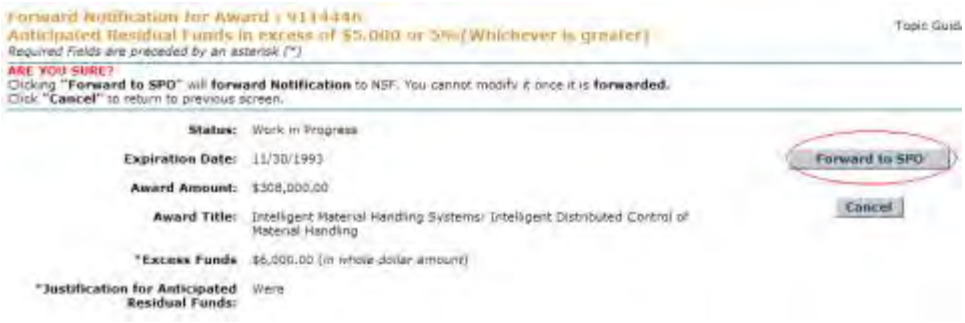

Figure 2 Forward Notification screen. The Forward to SPO button is circled.

3. Click the **Forward to SPO** button (Figure 2). The **Forwarded** screen displays (Figure 3) with a message that the notification (or request) has been submitted to NSF.

Figure 3 Forwarded screen. The Search Prepared by PI List link is circled.

4. Click **Search Prepared by PI List** (Figure 3). The **Notifications and Requests** screen displays on the **Prepared by PI** tab.

Delete a Notification or Request Prepared by the PI

1. Access the **Notifications and Requests** screen on the **Prepared by PI** tab (Figure 1) (see Access Notifications and Requests as a PI).

Figure 1 Notifications and Requests screen on the Prepared by PI tab. The Delete link is circled for a request.

2. In the **Work in Progress** section of the **Notifications and Requests** screen (Figure 1), click **Delete** in the row for the request (or notification) you want to delete. The **Delete Request** screen displays (Figure 2) with a message for you to confirm that you want to delete the request. (The **Delete Notification** screen displays if you are deleting a notification.)

Figure 2 Delete Request screen. The message for you to confirm that you want to delete the request and the Delete button are circled.

3. Click the **Delete** button (Figure 2). The **Deleted** screen displays (Figure 3) with a message that the request (or notification) has been deleted.

Figure 3 Deleted screen. The Search Prepared by PI List link is circled.

4. Click **Search Prepared by PI List** (Figure 3). The **Notifications and Requests** screen displays on the **Prepared by PI** tab (Figure 1).

Check the Status of Notifications and Requests as a PI

1. Access the **Notifications and Requests** screen on the **Prepared by PI** tab (Figure 1) (see Access Notifications and Requests as a PI).

Figure 1 Notifications and Requests screen on the Prepared by PI tab. The All by Status tab is circled.

2. On the **Notifications and Requests** screen on the **Prepared by PI** tab (Figure 1), click the **All by Status** tab. The **Notifications and Requests** screen displays on the **All by Status** tab (Figure 2). You can search for notifications and requests by either of these criteria:
   - Award number
   - Date last modified

   On this screen, you can also:
   - View a forwarded, submitted, or approved notification or request

- View a notification or request that is in progress

(Click on a link above for instructions for that option.)

Figure 2 Notifications and Requests screen on the All by Status tab. The Search by Award # section is circled.

Search by Award Number for Notifications and Requests

1. In the **Award #** box of the **Notifications and Requests** screen on the **All by Status** tab (Figure 2), type the award number for the award whose notifications and requests you want to find.
2. Click the **Search** button (Figure 2). The **Notifications and Requests** screen displays on the **All by Status** tab (Figure 3). All notifications and requests, including those in progress, are listed in the **All by Status** section with their status.

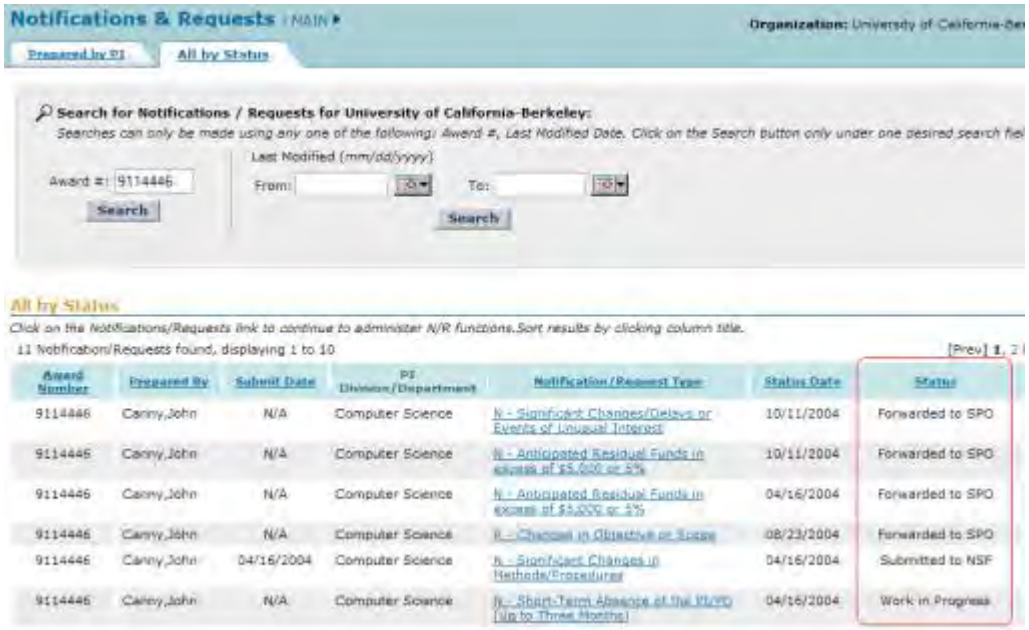

Figure 3 Notifications and Requests screen on the All by Status tab. The Status column is circled.

Search by the Date the Notification or Request Was Last Modified

1. On the **Notifications and Requests** screen on the **All by Status** tab (Figure 4), in the **From** box, type the start date for the date range you want to search for.

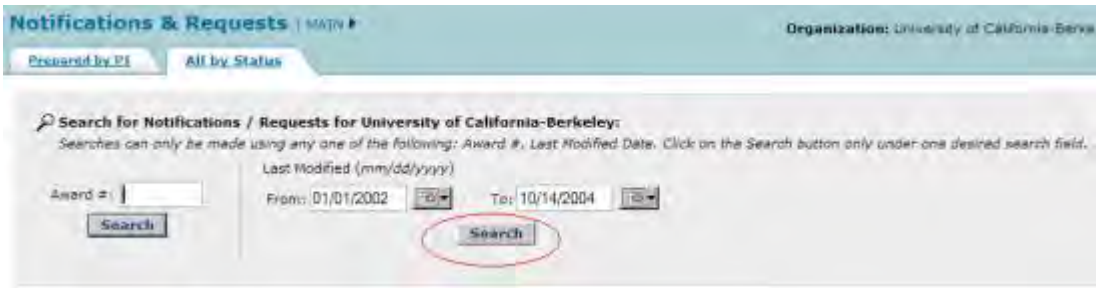

Figure 4 Notifications and Requests screen on the All by Status tab. The Search button is circled for a search by the date last modified.

2. In the **To** box (Figure 4), type the end date for the date range you want to search for.
3. Click the **Search** button (Figure 4). The **Notifications and Requests** screen displays (Figure 5) on the **All by Status** tab. All the notifications and requests in that date range and their statuses are listed in the **All by Status** section.

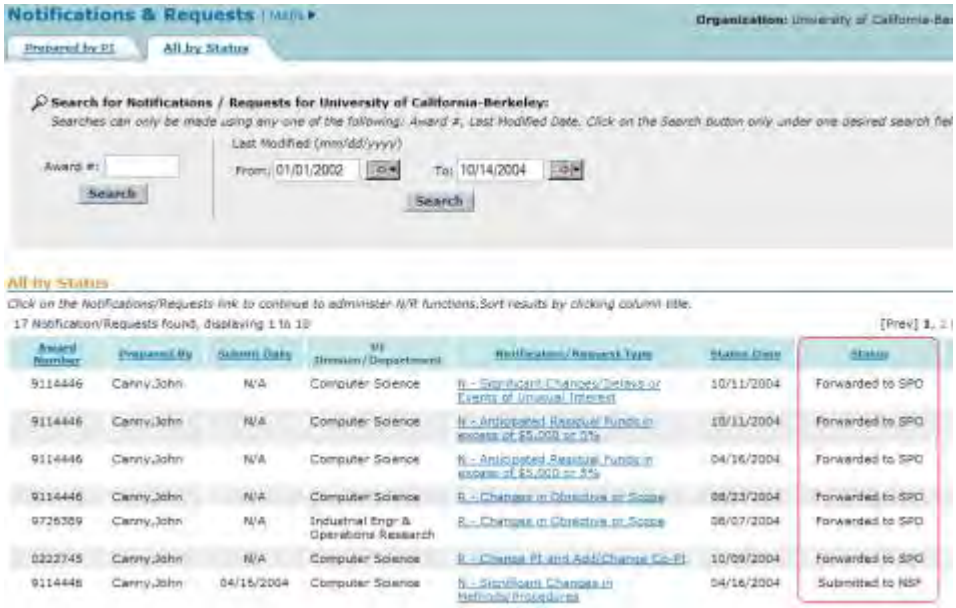

Figure 5 Notifications and Requests screen on the All by Status tab. The Status column is circled.

View a Forwarded, Submitted, or Approved Notification or Request

1. On the **Notifications and Requests** screen on the **All by Status** tab (Figure 6), click the **Notification/Request Type** link on the row of the notification or request you want to view. The **View Notification** (or **View Request**) screen displays (Figure 7) with the

contents of the notification or request. You can no longer work on a notification or request that has been forwarded, submitted, or approved.

Figure 6 Notifications and Requests screen on the All by Status tab. The Notification / Request Type link is circled for a notification.

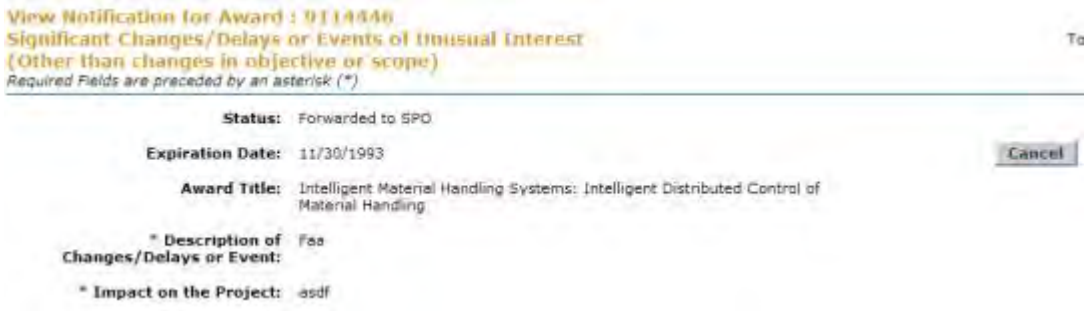

Figure 7 View Notification screen.

2. Click the **Cancel** button (Figure 7). The **Notifications and Requests** screen displays on the **All by Status** tab (Figure 6).

View a Notification or Request in Progress

On the **Notifications and Requests** screen on the **All by Status** tab (Figure 8), click the **Notification / Request Type** link on the row of the in-progress notification or request you want to view. The **View Request** (or **View Notification**) screen displays (Figure 9) with the contents of the notification or request. You have these options on this screen:

- Modify the notification or request
- Forward the notification or request to the SPO
- Delete the notification or request

(Click on a link above for instructions for that option.)

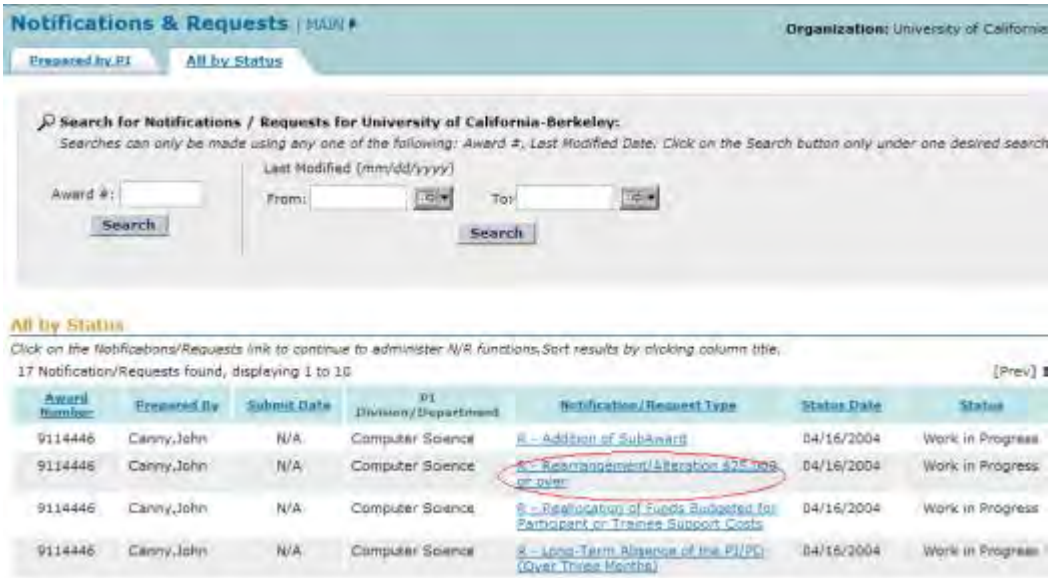

Figure 8 Notifications and Requests screen on the All by Status tab. The Notification/Request Type link is circled for a request.

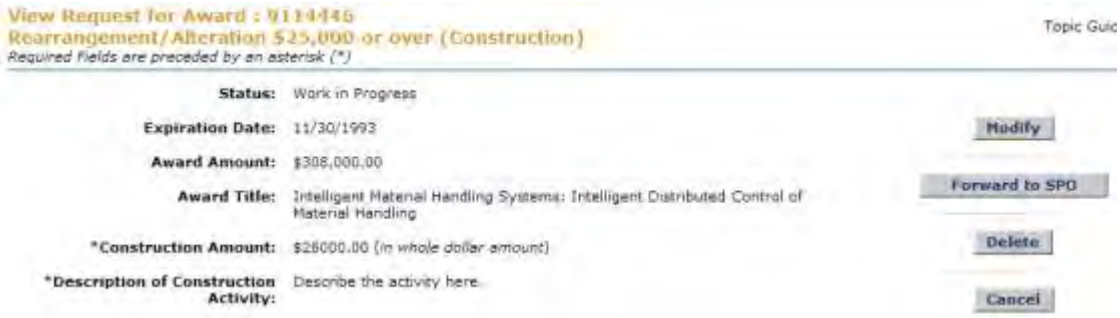

Figure 9 View Request screen for an in-progress request.

View the Award Amendment for an Approved Notification or Request as a PI

1. Access the **Notifications and Requests** screen on the **All by Status** tab and search for notifications and requests as you require (see Check the Status of Notifications and Requests). The **Notifications and Requests** screen displays (Figure 1) with all notifications and requests.

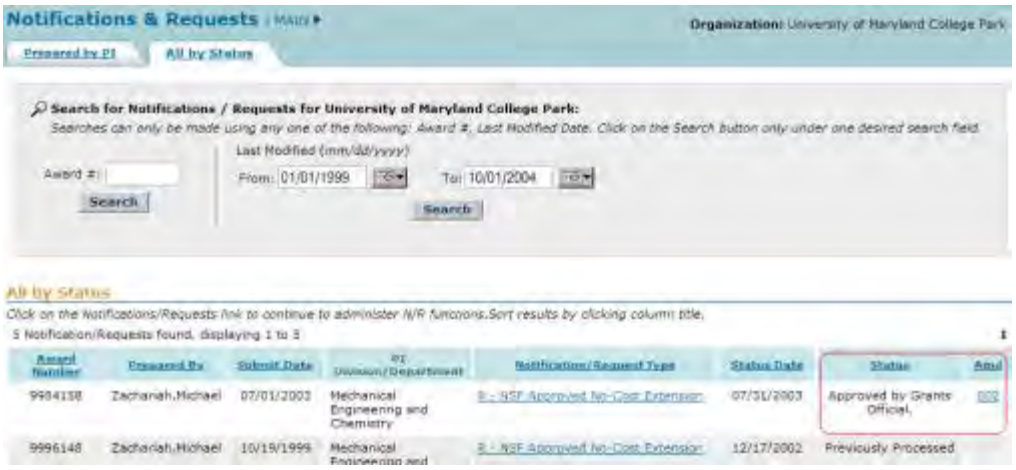

Figure 1 Notifications and Requests screen on the All by Status tab. The status and Amd (Amendment) number are circled for an approved request.

2. Find a notification or request that has the status “Approved by Grants Official” (Figure 1).
3. Click the amendment number in the **Amd** column in the row for the approved notification or request (Figure 1). The **National Science Foundation** screen displays (Figure 2).

Figure 2 National Science Foundation screen with the amendment text. The Return to Search Results link is circled.

4. Click **Return to Search Results** (Figure 2). The **Notifications and Requests** screen displays on the **All by Status** tab (Figure 1).

SPO Functions

SPO/AOR Functions Introduction for Notifications and Requests

Print the contents of the SPO Functions for Notifications and Requests book.

As an SPO/AOR, you have these options for working on Notifications and Requests in FastLane:

- Access Notifications and Requests as a SPO

- Prepare a new notification or request as a SPO
- Work on notifications and requests prepared by an SPO
- Work on notifications and requests forwarded by the PI
- Check the status of submitted notifications and requests
- View the award amendment for an approved notification or request

Note: Many of the Notifications and Requests functions of FastLane have been migrated to Research.gov

SPO/AOR Functions Introduction for Notifications and Requests

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- Work on notifications and requests prepared by an SPO
- Work on notifications and requests forwarded by the PI
- Check the status of submitted notifications and requests
- View the award amendment for an approved notification or request

Note: Many of the Notifications and Requests functions of FastLane have been migrated to Research.gov

Access Notifications and Requests as an SPO

1. On the **FastLane Home Page** screen, log in to **Research Administration** as an SPO (see SPO/AOR Login to Award Functions). The **Research Administration** screen displays (Figure 1).

Figure 1 Research Administration screen.

2. Click **Notifications and Requests** (Figure 1). The **Notifications and Requests** screen displays (Figure 2). There are three tabs on the **Notifications and Requests** screen**:**
   - **Forwarded by PI** tab
     Perform functions for notifications and requests forwarded to you by your organization's PIs on this tab.
   - **Prepared by SPO** tab
     Prepare new notifications and requests on this tab.
   - **Submitted to NSF** tab
     View notifications and requests that have been submitted to NSF on this tab.

The **Notifications and Requests** screen first displays (Figure 2) on the **Forwarded by PI** tab. Click on a tab title to go to that tab.

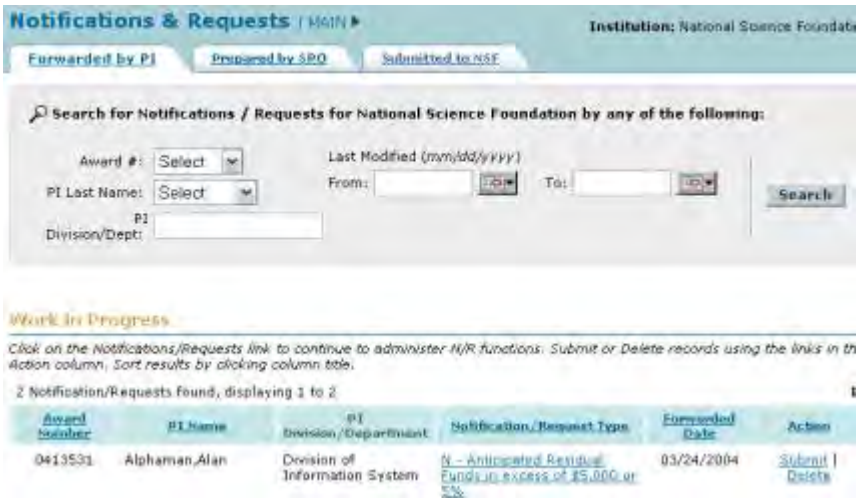

Figure 2 Notifications and Requests screen on the Forwarded by PI tab.

Prepare a New Notification or Request as an SPO

1. Access the **Notifications and Requests** screen on the **Forwarded by PI** tab (Figure 1) (see Access Notifications and Requests as an SPO/AOR).

Figure 1 Notifications and Requests screen on the Forwarded by PI tab. The Prepared by SPO tab is circled.

2. On the **Notifications and Requests** screen on the **Forwarded by PI** tab (Figure 1), click the **Prepared by SPO** tab. The **Notifications and Requests** screen displays on the **Prepared by SPO** tab (Figure 2). You must be on the **Prepared by SPO** tab to prepare a new notification or request.

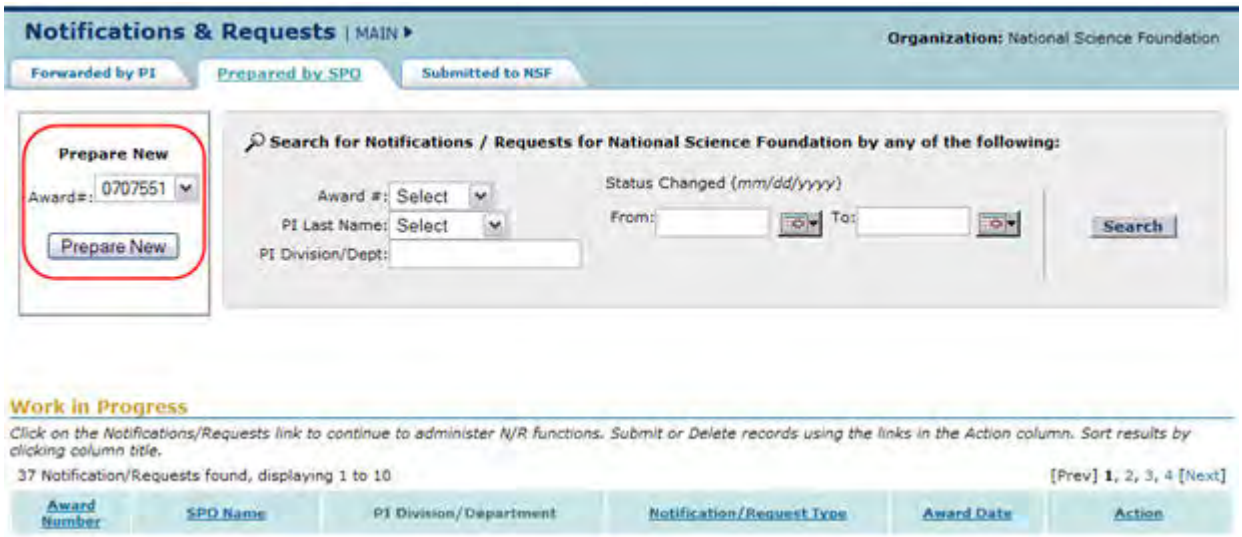

Figure 2 Notifications and Requests screen on the Prepared by SPO tab. The Prepare New section is circled.

3. In the **Prepare New** section (Figure 2), select the award number from the **Award #** drop-down list (Figure 2) for the award that you want to prepare either a notification or a request for.
4. Click the **Prepare New** button (Figure 2). The **Prepare a New Notification or Request** screen displays (Figures 3).

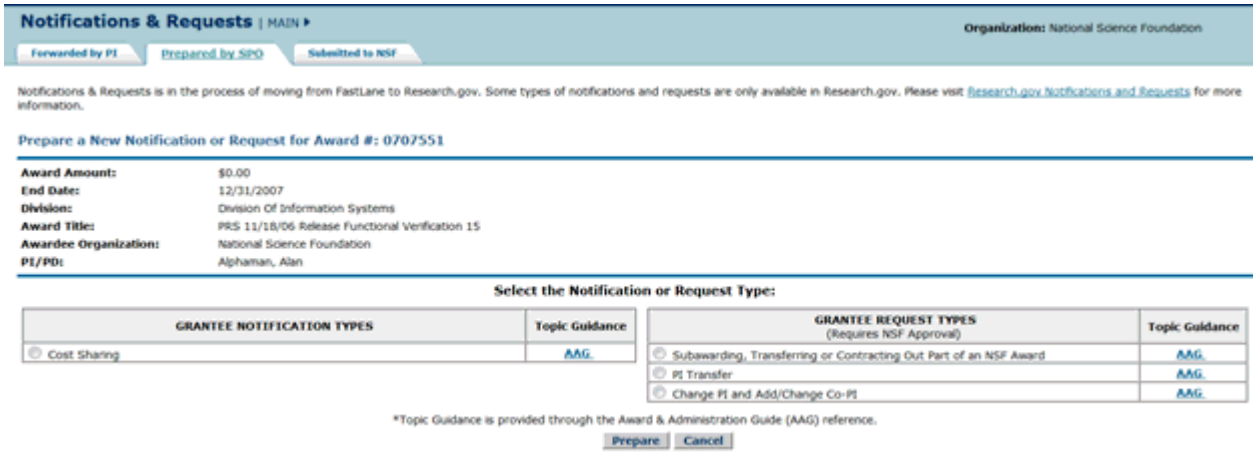

Figure 3 Prepare a New Notification or Request screen.

The screen lists the different types of notifications and requests you can prepare.

For notifications, select from:

- Annual and Final Cost Sharing Notification by Recipient

For requests, select from:

- Subawarding, Transferring or Contracting Out Part of an Award
- PI Transfer
- Change PI Add/Change Co-PI

Work on Notifications and Requests Prepared by SPO

Work on Notifications and Requests Prepared by the SPO

1. Access **Notifications and Requests** screen on the **Forwarded by PI** tab (Figure 1) (see Access Notifications and Requests as an SPO/AOR).

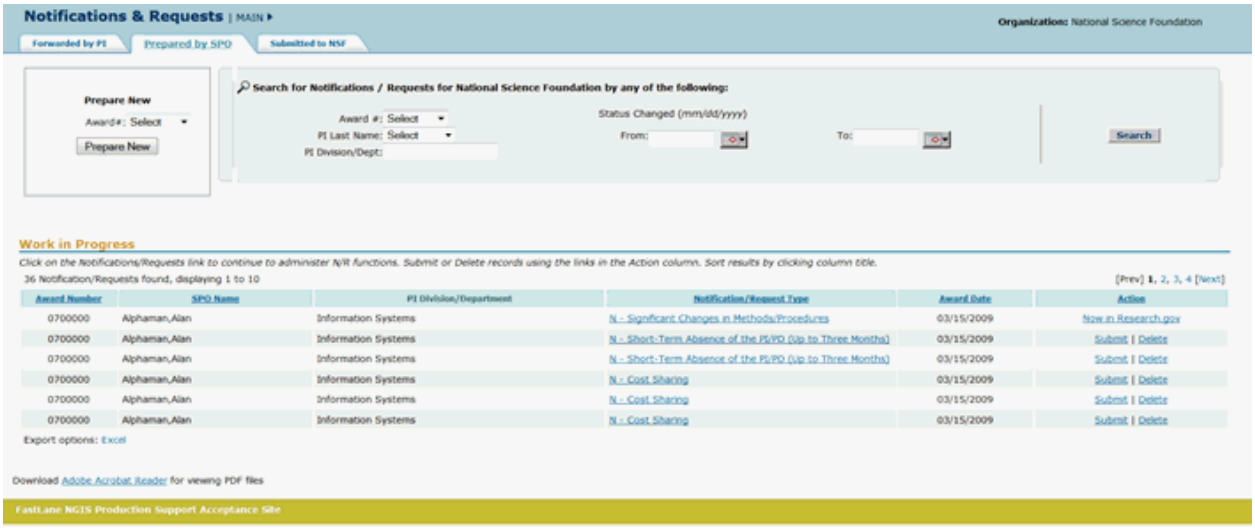

Figure 1 Notifications and Requests screen on the Forwarded by PI tab. The Prepared by SPO tab is circled.

2. On the **Notifications and Requests** screen on the **Forwarded by PI** tab (Figure 1), click the **Prepared by SPO** tab. The **Notifications and Requests** screen displays on the **Prepared by SPO** tab (Figure 2). On this tab you work on notifications and requests that you have prepared. You have these options:
   - Search for notifications and requests
   - View a notification or request
   - Modify a notification or request
   - Submit a notification or request (AOR only)
   - Delete a notification or request

   (Click on a link above for instructions for that option.)

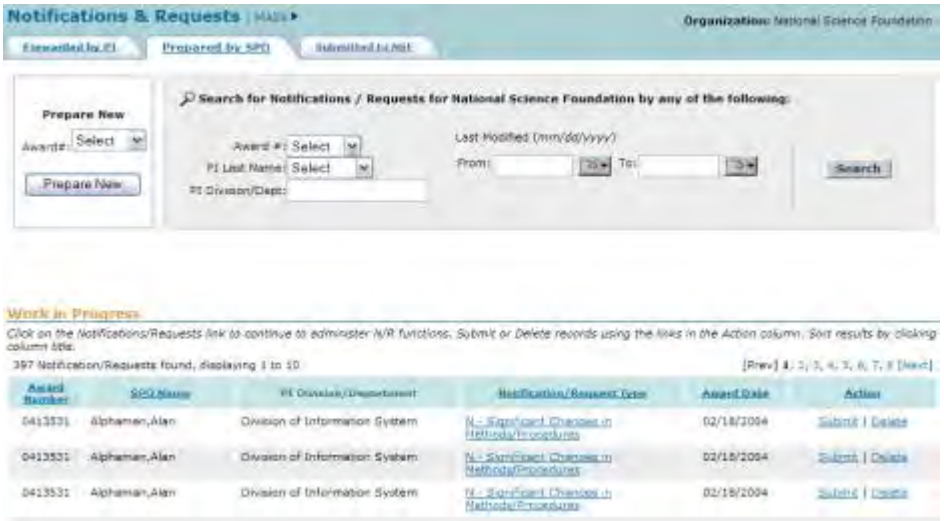

Figure 2 Notifications and Requests screen on the Prepared by SPO tab.

Work on Notifications and Requests Prepared by the SPO

1. Access **Notifications and Requests** screen on the **Forwarded by PI** tab (Figure 1) (see Access Notifications and Requests as an SPO/AOR).

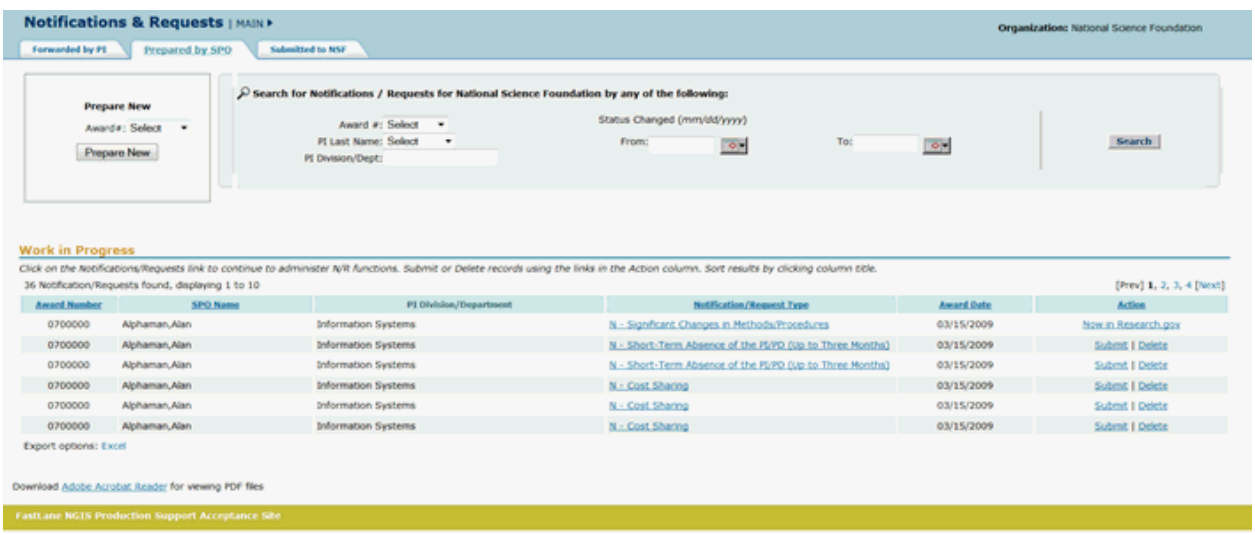

Figure 1 Notifications and Requests screen on the Forwarded by PI tab. The Prepared by SPO tab is circled.

2. On the **Notifications and Requests** screen on the **Forwarded by PI** tab (Figure 1), click the **Prepared by SPO** tab. The **Notifications and Requests** screen displays on the **Prepared by SPO** tab (Figure 2). On this tab you work on notifications and requests that you have prepared. You have these options:
   - Search for notifications and requests
   - View a notification or request
   - Modify a notification or request
   - Submit a notification or request (AOR only)

- Delete a notification or request
  (Click on a link above for instructions for that option.)

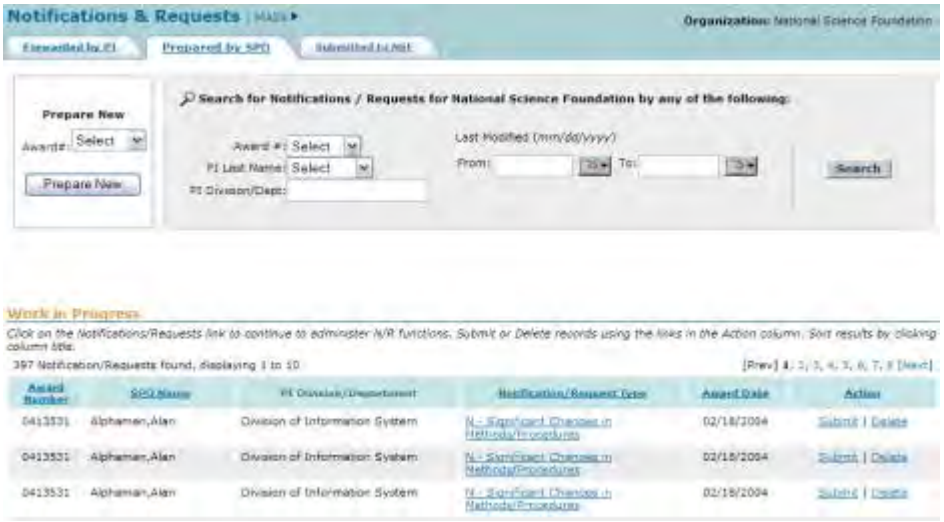

Figure 2 Notifications and Requests screen on the Prepared by SPO tab.

Search for Notifications and Requests Prepared by the SPO

1. Access the **Notifications and Requests** screen on the **Prepared by SPO** tab (Figure 1) (see Work on Notifications and Requests Prepared by the SPO).

Figure 1 Notifications and Requests screen on the Prepared by SPO tab. The Search for Notifications/Requests section and the Search button are circled.

2. In the **Search for Notifications/Requests** section of the **Notifications and Requests** screen (Figure 1), search for the notifications or requests by any of these criteria:
   - **Award number**
     Select the award number from the **Award #** drop-down list.
   - **PI name**
     Select the PI's last name from the **PI Last Name** drop-down list.

- **PI division or department**
  In the **PI Division/Dept.** box, type the PI's division or department.
- **Date range**
  - In the **From** box, type the start date for the search (in mm/dd/yyyy format).
  - In the **To** box, type the end date for the search (in mm/dd/yyyy format).

3. Click the **Search** button (Figure 1). The results of your search display in the **Work in Progress** section of the **Notifications and Requests** screen on the **Prepared by SPO** tab (Figure 2).

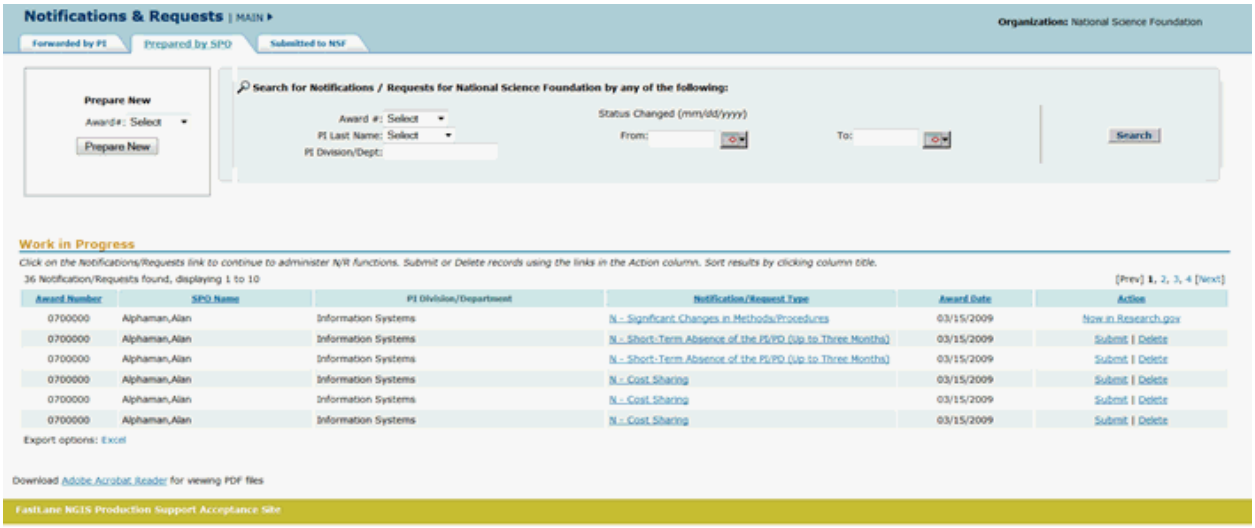

Figure 2 Notifications and Requests screen on the Prepared by SPO tab. The Work in Progress section is circled.

4. Find the notification or request you want to work on. You have these options:
   - View the notification or request
   - Modify the notification or request
   - Submit the notification or request (AOR only)
   - Delete the notification or request
   (Click on a link above for instructions for that form.)

View a Notification or Request Prepared by the SPO

1. Access the **Notifications and Requests** screen on the **Prepared by SPO** tab (Figure 1) (see Work on Notifications and Requests Prepared by SPO/AOR).

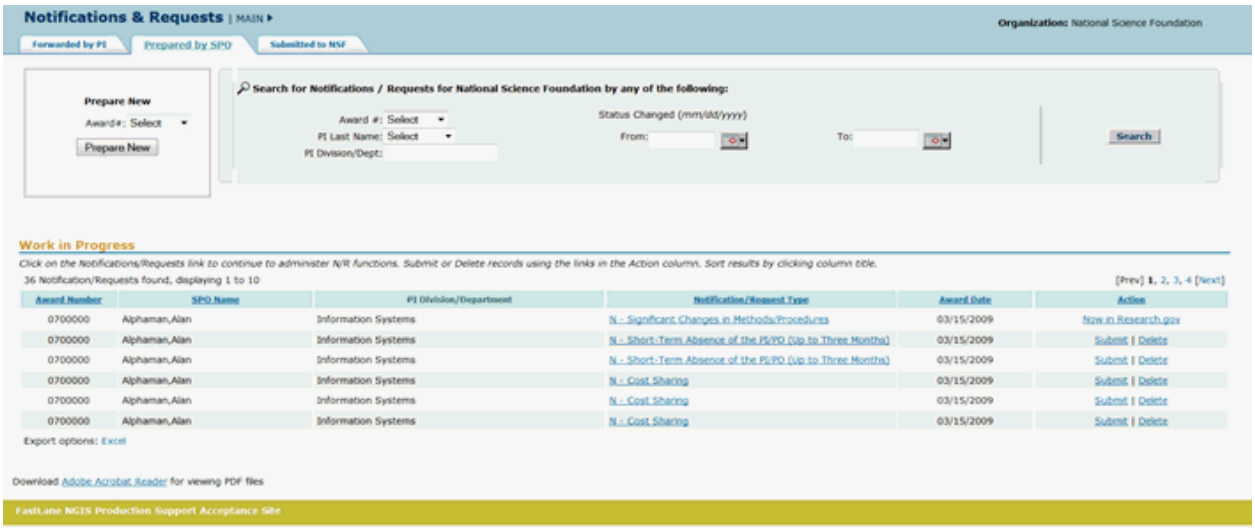

Figure 1 Notifications and Requests screen on the Prepared by SPO tab.

2. In the **Work in Progress** section of the **Notifications and Requests** screen (Figure 1), click the **Notification/Request Type** link on the row for the notification (or request) you want to view. The **View Notification** screen displays (Figure 2) with the text of the notification. (The **View Request** screen displays if you are viewing a request.) You have these options on the **View Notification** (or **View Request**) screen:
   - Modify the notification (or request)
   - Submit the notification (or request) (AOR only)
   - Delete the notification (or request)

   (Click on a link above for instructions for that option.)

Figure 2 View Notification screen.

Modify a Notification or Request Prepared by the SPO

1. Access the **View Notification** (or **View Request**) screen (Figure 1) (see View a Notification or Request Prepared by the SPO).

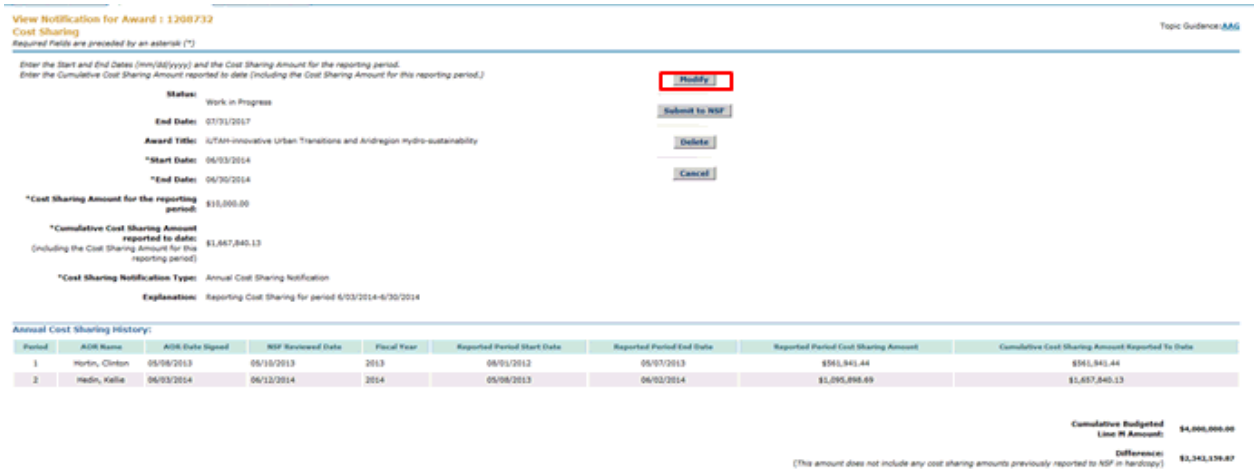

Figure 1 View Notification screen. The Modify button is circled.

2. On the **View Notification** screen (Figure 1), click the **Modify** button (Figure 1). The **Modify Notification** (or **Modify Request**) screen displays (Figure 2).

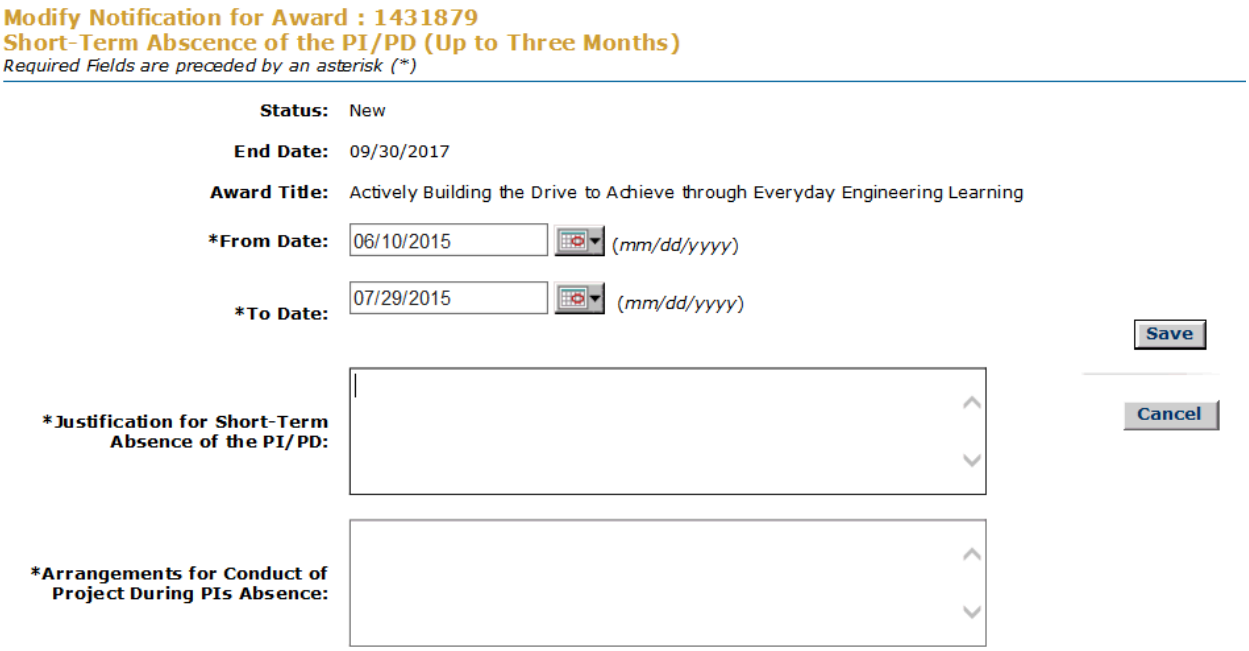

Figure 2 Modify Notification screen.

3. Modify the notification (or request) as you require. Click on a link below for the instructions for the kind of notification or request you are modifying:

   For notifications, select from:

   - Annual and Final Cost Sharing Notification by Recipient

   For requests, select from:

   - Subawarding, Transferring or Contracting Out Part of an Award

- PI Transfer
- Change PI Add/Change PI/Co-PI

(Click on a link above for instructions for that form.)

4. Click the **Save** button (Figure 2). The **View Notification** screen displays (Figure 3) with the changed information.

Figure 3 View Notification screen with the new information.

Submit a Notification or Request Prepared by the SPO (AOR only)

1. Access the **Notifications and Requests** screen on the **Prepared by SPO** tab (Figure 1) (see Work on Notifications and Requests Prepared by the SPO).

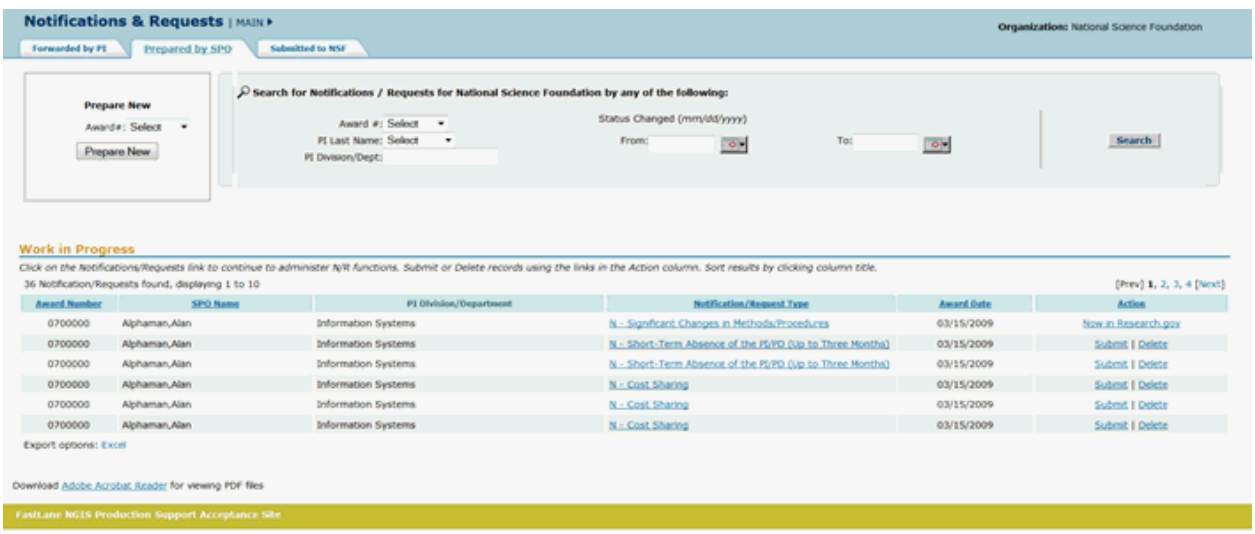

Figure 1 Notifications and Requests screen on the Prepared by SPO tab. The Submit link is circled for a request.

2. In the **Work in Progress** section of the **Notifications and Requests** screen (Figure 1), click **Submit** in the row for the request (or notification) you want to submit to NSF. The **Submit Request** screen displays (Figure 2) with a message at the top for you to

confirm that you want to submit the request (or notification) to NSF. (The **Submit Notification** screen displays if you are submitting a notification.)

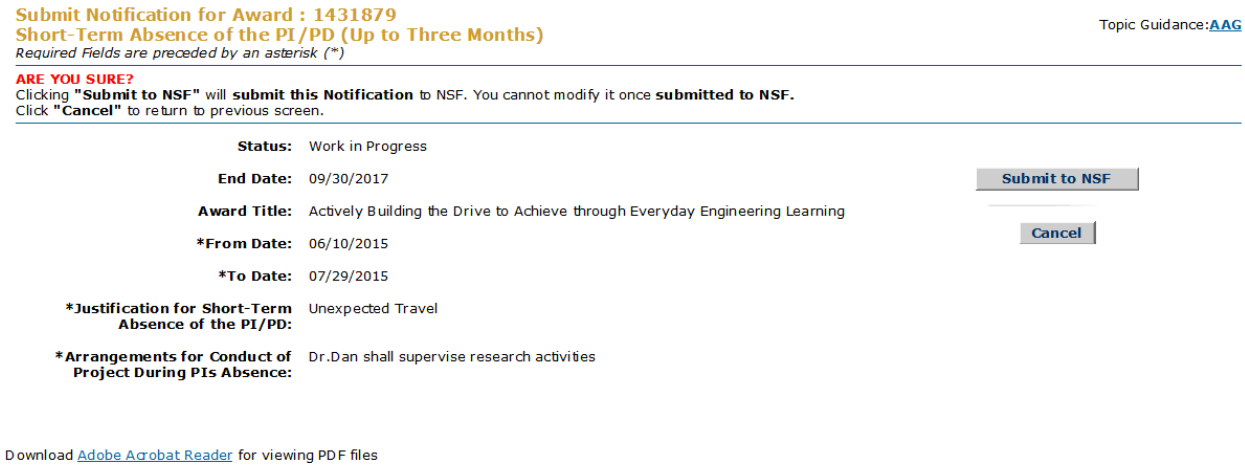

Figure 2 Submit Request screen.

3. Click the **Submit to NSF** button (Figure 2). The **Submitted** screen displays (Figure 3) with a message that the request (or notification) has been submitted to NSF.

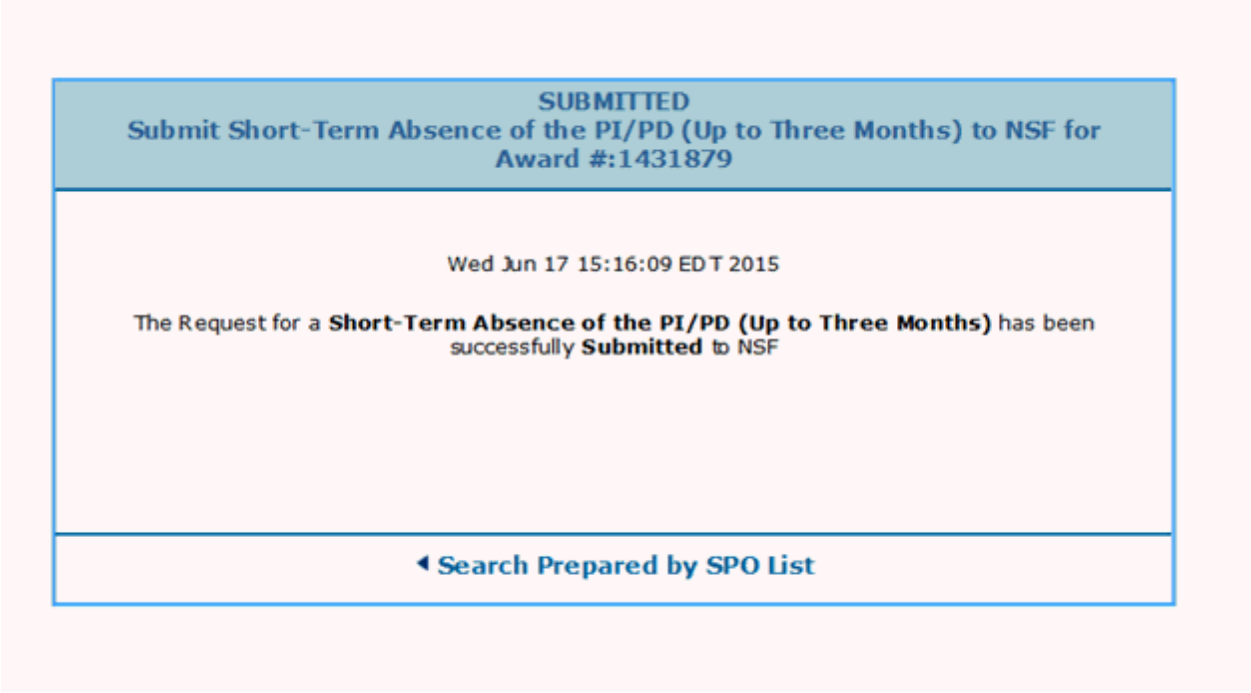

Figure 3 Submitted screen.

4. Click **Search Prepared by SPO List** (Figure 3). The **Notifications and Requests** screen displays on the **Prepared by SPO** tab (Figure 1).

Delete a Notification or Request Prepared by the SPO

1. Access the **Notifications and Requests** screen on the **Prepared by SPO** tab (Figure 1) (see Work on Notifications and Requests Prepared by the SPO/AOR).

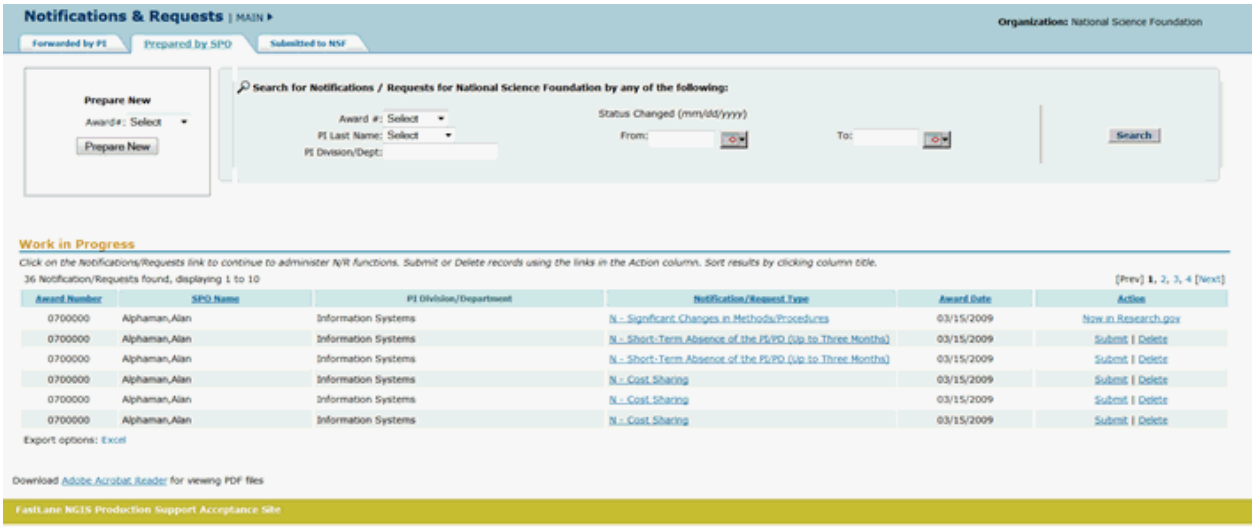

Figure 1 Notifications and Requests screen on the Prepared by SPO tab.

2. In the **Work in Progress** section of the **Notifications and Requests** screen (Figure 1), click **Delete** in the row for the notification (or request) you want to delete. The **Delete Notification** screen displays (Figure 2) with a message for you to confirm that you want to delete the notification. (The **Delete Notification** screen displays if you chose to delete a notification.)

Figure 2 Delete Notification screen. The Delete button is circled.

3. Click the **Delete** button (Figure 2). The **Deleted** screen displays (Figure 3) with a message that the notification (or request) has been deleted.

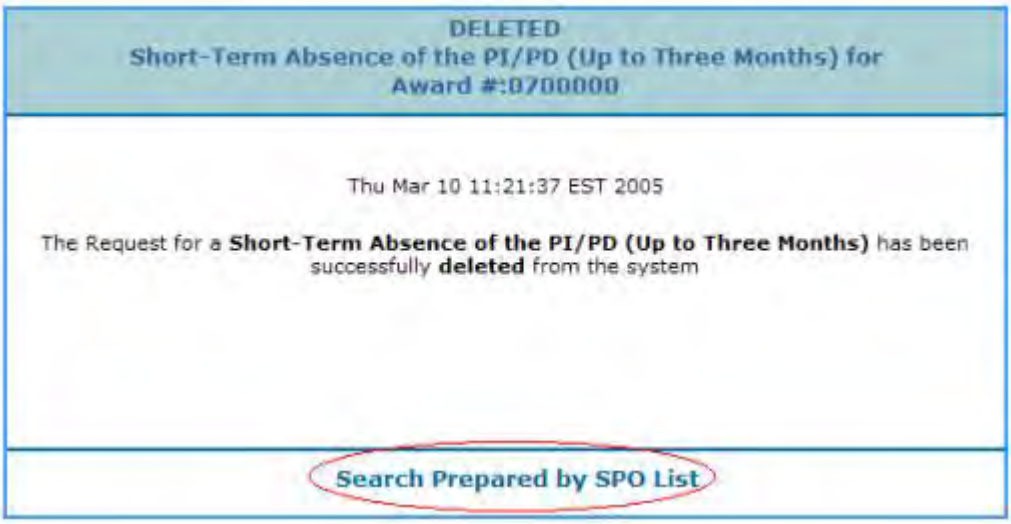

Figure 3 Deleted screen. The Search Prepared by SPO List link is circled.

4. Click **Search Prepared by SPO List** (Figure 3). The **Notifications and Requests** screen displays on the **Prepared by SPO** tab (Figure 1).

Work on Notifications and Requests Forwarded by PI

Work on Notifications and Requests Forwarded by the PI

Access the **Notifications and Requests** screen on the **Forwarded by PI** tab (Figure 1) (see Access Notifications and Requests as an SPO/AOR). The screen displays with a listing of the notifications and requests that have been forwarded by PIs but have not been submitted to NSF.

Figure 1 Notifications and Requests screen on the Forwarded by PI tab.

On this tab you work on notifications and requests that have been forwarded by PIs. You have these options:

- Search for notifications and requests
- View the notification or request
- Modify the notification or modify the request
- Submit the notification or request
- Return the notification or request to the PI
- Delete the notification or request

(Click on a link above for instructions for that option.)

Click on a link below for the instructions for modifying that notification or request form:

For notifications, select from:

- Annual and Final Cost Sharing Notification by Recipient

For requests, select from:

- Subawarding, Transferring or Contracting Out Part of an Award
- PI Transfer
- Change PI Add/Change PI/Co-PI

Work on Notifications and Requests Forwarded by the PI

Access the **Notifications and Requests** screen on the **Forwarded by PI** tab (Figure 1) (see Access Notifications and Requests as an SPO/AOR). The screen displays with a listing of the notifications and requests that have been forwarded by PIs but have not been submitted to NSF.

Figure 1 Notifications and Requests screen on the Forwarded by PI tab.

On this tab you work on notifications and requests that have been forwarded by PIs. You have these options:

- Search for notifications and requests
- View the notification or request
- Modify the notification or modify the request

- Submit the notification or request
- Return the notification or request to the PI
- Delete the notification or request

(Click on a link above for instructions for that option.)

Click on a link below for the instructions for modifying that notification or request form:

For notifications, select from:

- Annual and Final Cost Sharing Notification by Recipient

For requests, select from:

- Subawarding, Transferring or Contracting Out Part of an Award
- PI Transfer
- Change PI Add/Change PI/Co-PI

View a Notification or Request Forwarded by the PI

1. Access the **Notifications and Requests** screen on the **Forwarded by PI** tab (Figure 1) (see Access Notifications and Requests as an SPO/AOR). The screen displays with a listing of the notifications and requests that have been forwarded by PIs but have not been submitted to NSF.

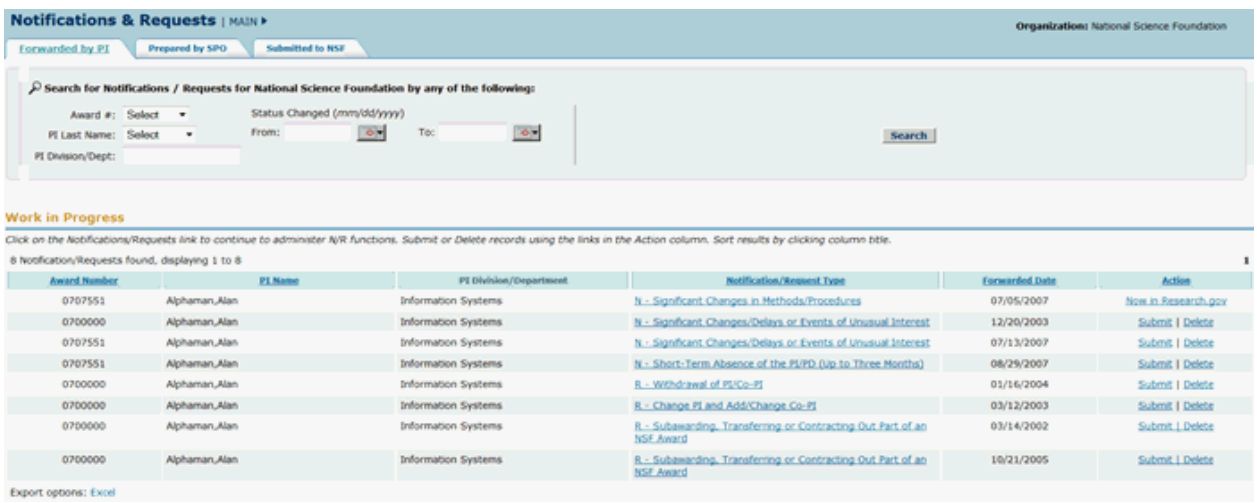

Figure 1 Notifications and Requests screen on the Forwarded by PI tab.

2. In the **Work in Progress** section of the **Notifications and Requests** screen (Figure 1), click the **Notification/Request Type** link on the row for the request (or notification) you want to view. The **View Request** screen displays (Figure 2) with the text of the request. (The **View Notification** screen displays if you are viewing a notification.)

Figure 2 View Request screen with the text of the request displayed.

Search for Notifications and Requests Forwarded by the PI

1. Access the **Notifications and Requests** screen on the **Forwarded by PI** tab (Figure 1) (see Access Notifications and Requests as an SPO/AOR). The screen displays with a listing of the notifications and requests that have been forwarded by PIs but have not been submitted to NSF.

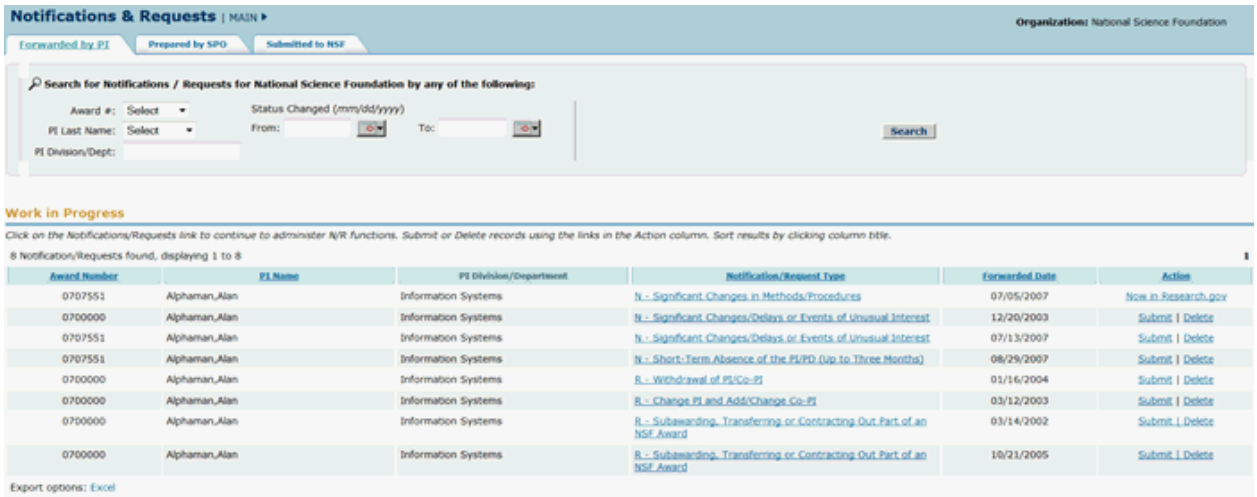

Figure 1 Notifications and Requests screen on the Forwarded by PI tab.

2. In the **Search for Notifications / Requests** section of the **Notifications and Requests** screen (Figure 2), search for the requests that you want to work on by any of these categories:
   - **Award number**
     Select the award number from the **Award #** drop-down list.
   - **PI name**
     Select the PI's last name from the **PI Last Name** drop-down list.
   - **PI division or department**
     In the **PI Division / Dept.** box, type the PI's division or department.
   - **Date range**
   - In the **From** box, type the start date for the search (in mm/dd/yyyy format).
   - In the **To** box, type the end date for the search (in mm/dd/yyyy format).

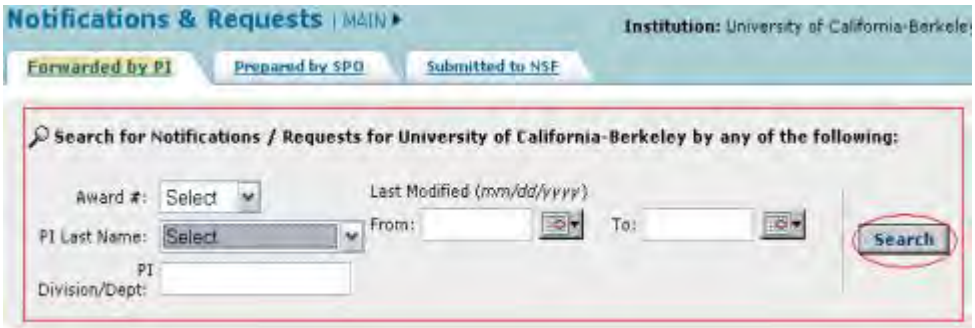

Figure 2 Notifications and Requests screen on the Forwarded by PI tab. The Search for Notifications/Requests section and the Search button are circled.

3. Click the **Search** button (Figure 2). The results of your search display in the **Work in Progress** section of the **Notifications and Requests** screen on the **Forwarded by PI** tab (Figure 3).

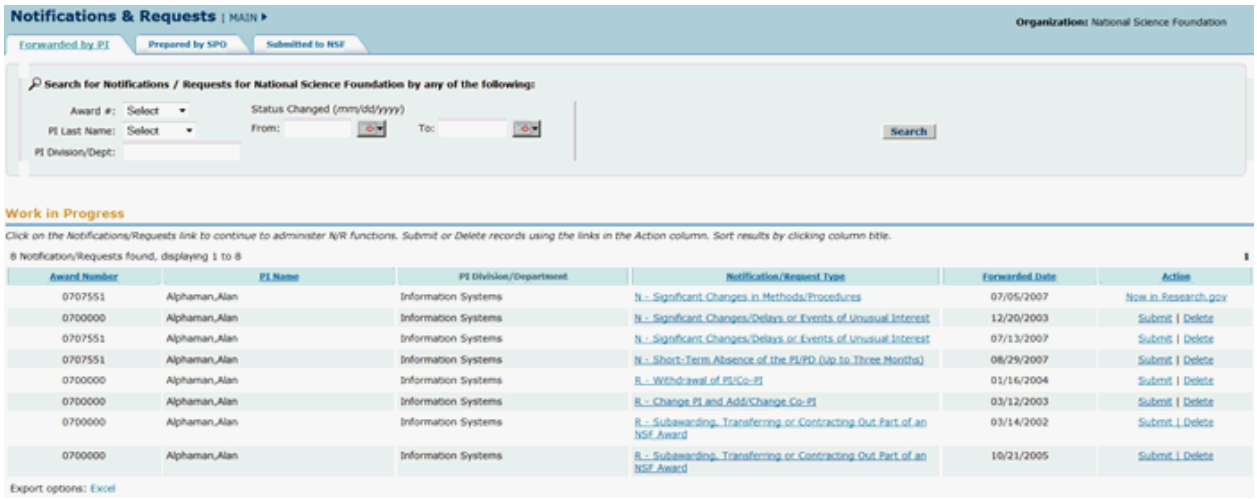

Figure 3 Notifications and Requests screen on the Forwarded by PI tab. The Work in Progress section is circled.

4. Find the notification or request you want to work on. You have these options:
   - View the notification or request
   - Modify the notification or modify the request
   - Submit the notification or request (AOR only)
   - Delete the notification or request
   - Return the notification or request to the PI

   (Click on a link above for instructions for that option.)

Submit to NSF a Notification or Request Forwarded by the PI

1. Access the **Notifications and Requests** screen on the **Forwarded by PI** tab (Figure 1) (see Access Notifications and Requests as an SPO/AOR). The screen displays with a

listing of the notifications and requests that have been forwarded by PIs but have not been submitted to NSF.

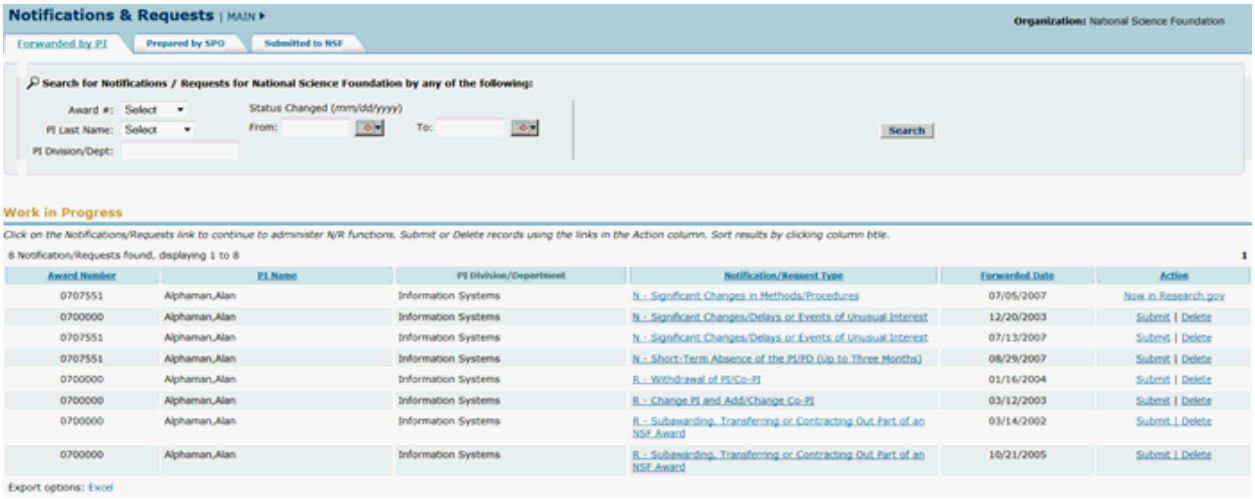

Figure 1 Notifications and Requests screen on the Forwarded by PI tab.

2. In the **Work in Progress** section of the **Notifications and Requests** screen (Figure 1), click **Submit** in the row for the request (or notification) you want to submit to NSF. The **Submit Request** screen displays (Figure 2) with a message for you to confirm that you want to submit the request (or notification) to NSF. (The **Submit Notification** screen displays if you are submitting a notification.)

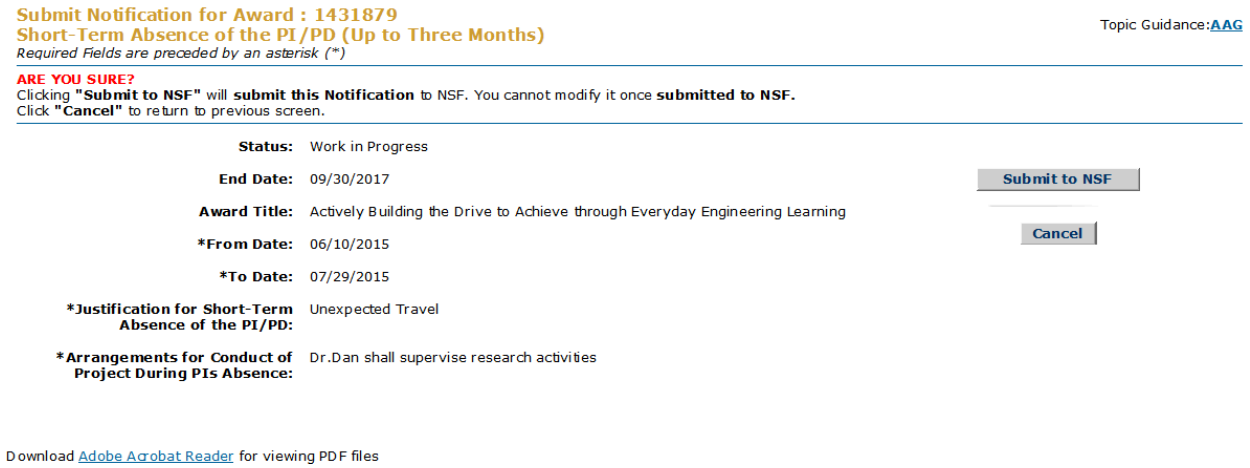

Figure 2 Submit Request screen with a message for you to confirm that you want to submit the request to NSF.

3. Click the **Submit to NSF** button (Figure 2). The **Submitted** screen displays (Figure 3) with a message that the request (or notification) has been submitted to NSF.

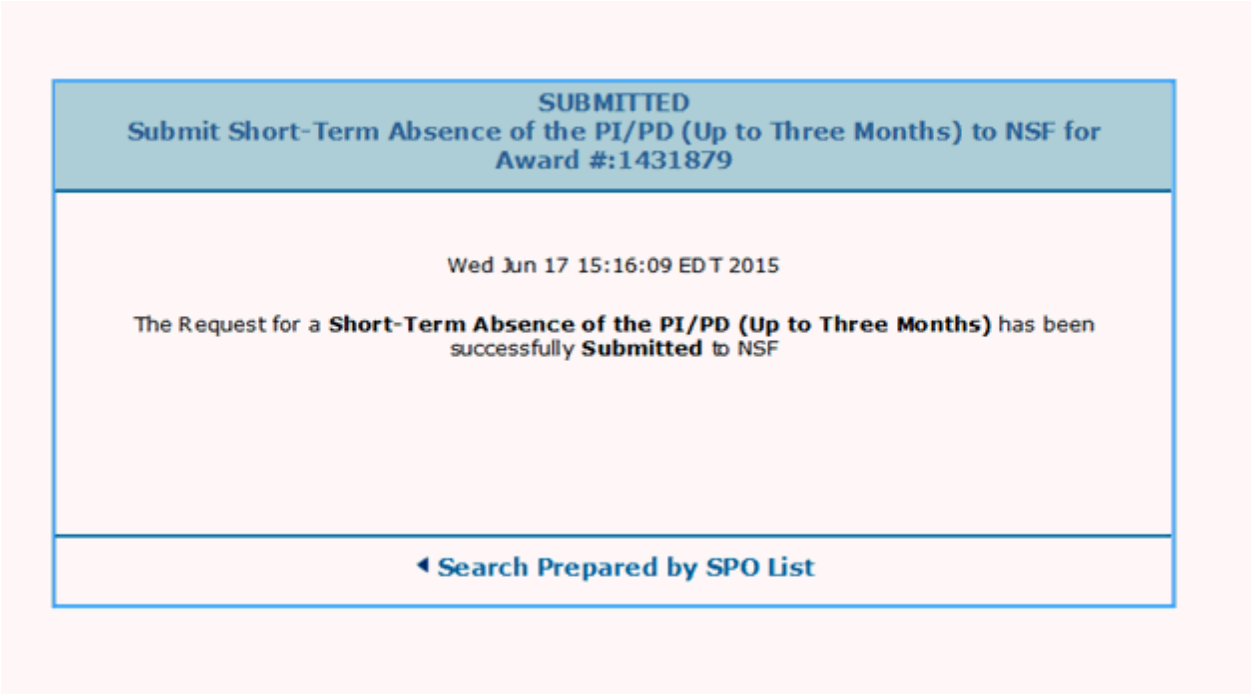

Figure 3 Submitted screen.

4. Click **Search Forwarded by PI List** (Figure 3). The **Notifications and Requests** screen displays on the **Forwarded by PI** tab.

Return a Notification or Request to the PI

1. Access the **Notifications and Requests** screen on the **Forwarded by PI** tab (Figure 1) (see Access Notifications and Requests as an SPO/AOR). The screen displays with a listing of the notifications and requests that have been forwarded by PIs but have not been submitted to NSF.

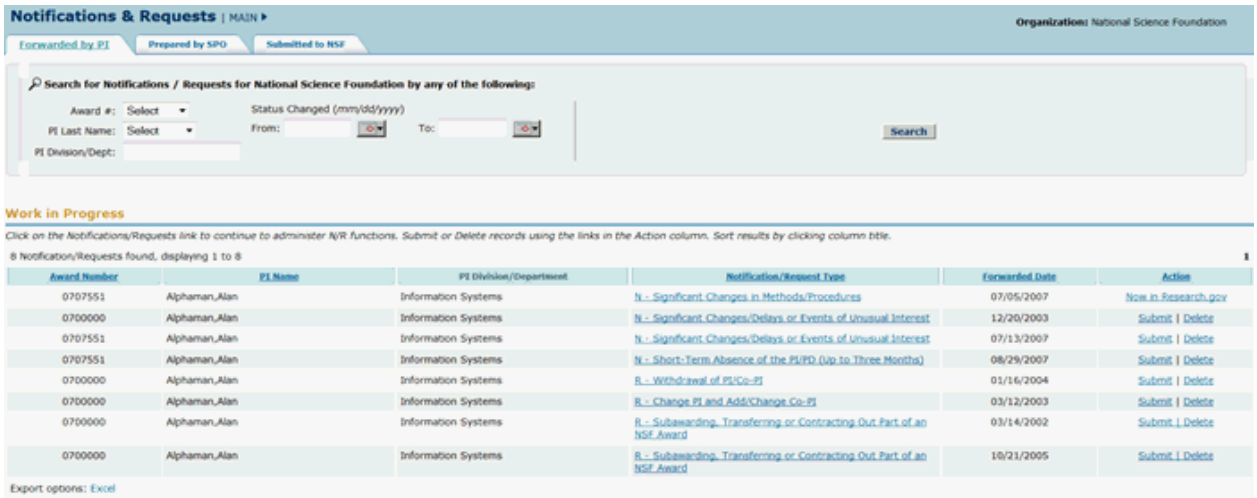

Figure 1 Notifications and Requests screen on the Forwarded by PI tab. The Notification/Request Type link is circled for a request.

2. In the **Work in Progress** section (Figure 1), click the **Notification/Request Type** link on the row for the request (or notification) you want to return. The **View Request** screen displays (Figure 2) with the request you want to return to the PI. (The **View Notification** screen displays if you are returning a notification.)

Figure 2 View Request screen. The Return to PI button is circled.

3. Click the **Return to PI** button (Figure 2). The **Return Request** screen displays (Figure 3). (The **Return Notification** screen displays if you are returning a notification).

Figure 3 Return Request screen. The Return to PI button is circled.

4. In the **Reasons for Returning to PI** box (Figure 3), type or copy and paste the reasons you are returning the request (or notification) to the PI. Once you return the request (or notification) to the PI, it is no longer available for you to work on.
5. Click the **Return to PI** button (Figure 3). The **Returned** screen displays (Figure 4) with a message that the request (or notification) has been returned to the PI.

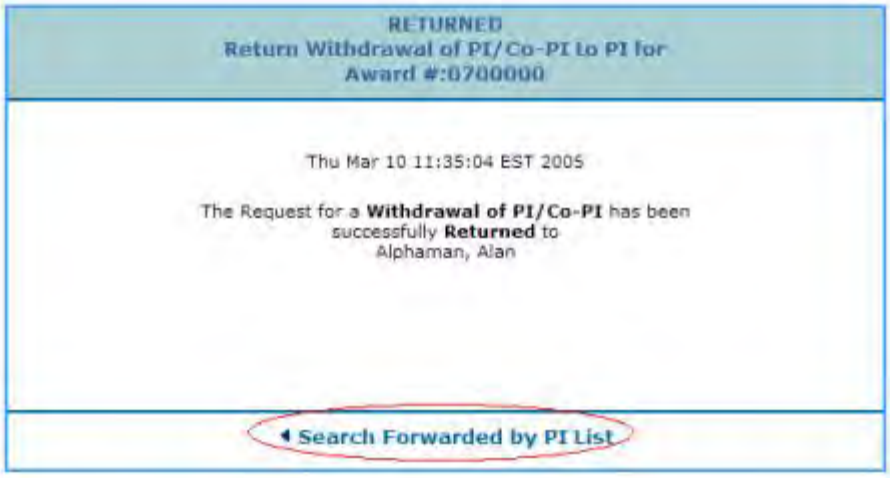

Figure 4 Returned screen. The Search Forwarded by PI List link is circled.

6. Click **Search Forwarded by PI List** (Figure 4). The **Notifications and Requests** screen displays on the **Forwarded by PI** tab (Figure 1).

Delete a Notification or Request Forwarded by the PI

1. Access the **Notifications and Requests** screen on the **Forwarded by PI** tab (Figure 1) (see Access Notifications and Requests as an SPO/AOR). The screen displays with a listing of the notifications and requests that have been forwarded by PIs but have not been submitted to NSF.

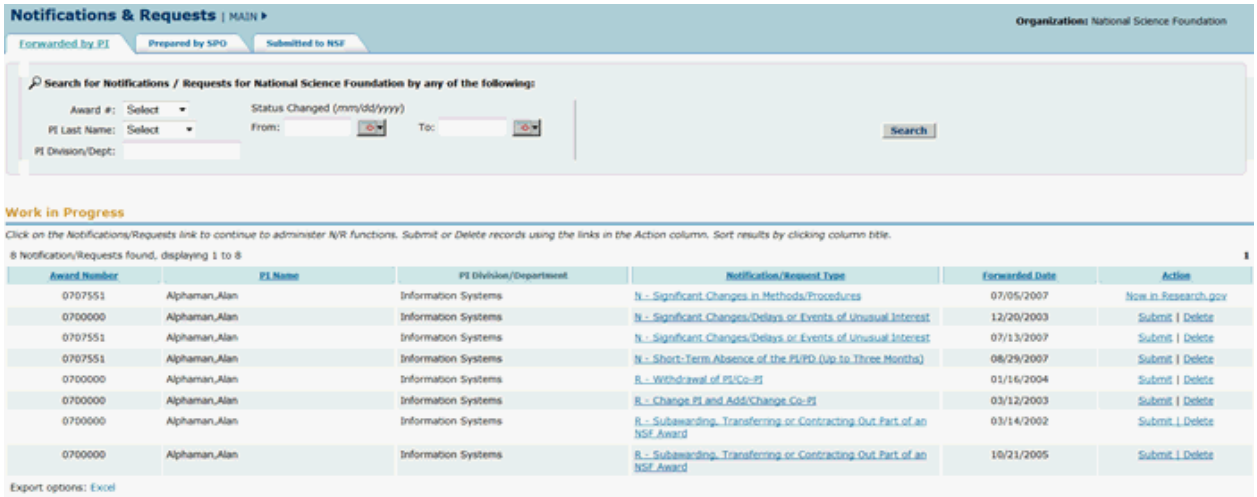

Figure 1 Notifications and Requests screen on the Forwarded by PI tab. The Delete link is circled for a request.

2. In the **Work in Progress** section of the **Notifications and Requests** screen (Figure 1), click **Delete** in the row for the request (or notification) you want to delete. The **Delete Request** screen displays (Figure 2) with a message for you to confirm that you want to delete the request. (The **Delete Notification** screen displays if you are deleting a notification.)

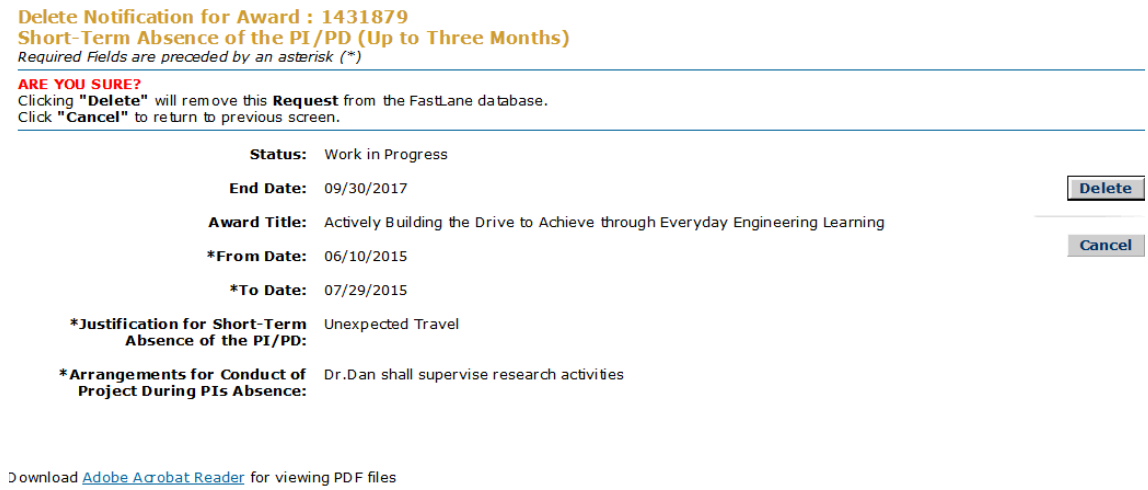

Figure 2 Delete Request screen with a message for you to confirm that you want to delete the request.

3. Click the **Delete** button (Figure 2). The **Deleted** screen displays (Figure 3) with a message that the request (or notification) has been deleted.

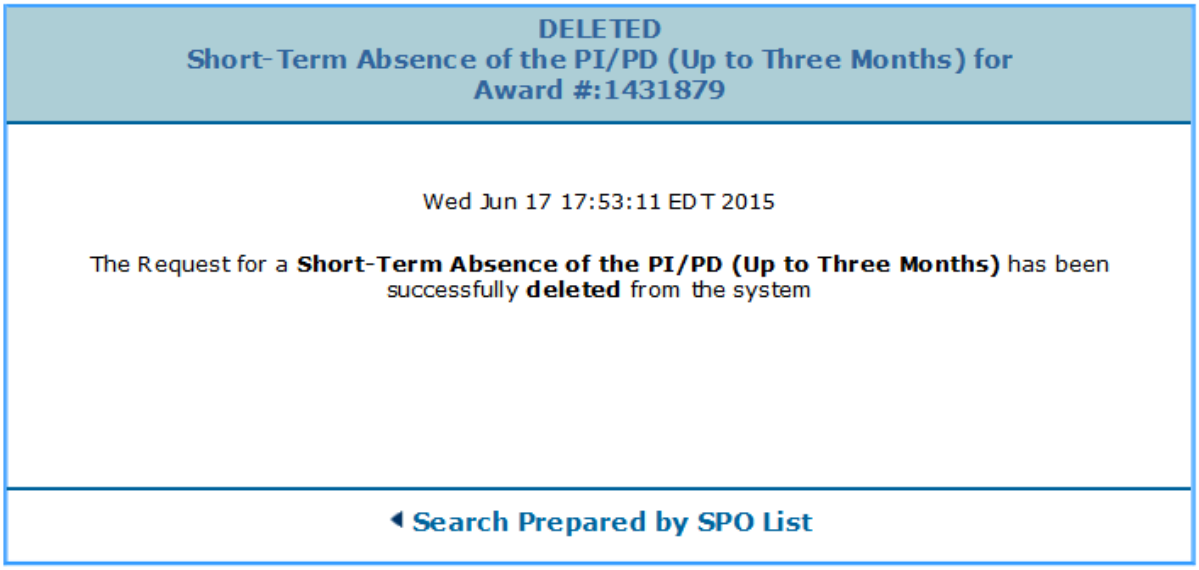

Figure 3 Deleted screen.

4. Click **Search Forwarded by PI List** (Figure 3). The **Notifications and Requests** screen displays on the **Forwarded by PI** tab.

Check the Status of Submitted Notifications and Requests

1. Access the **Notifications and Requests** screen on the **Forwarded by PI** tab (Figure 1) (see Access Notifications and Requests as an SPO/AOR).

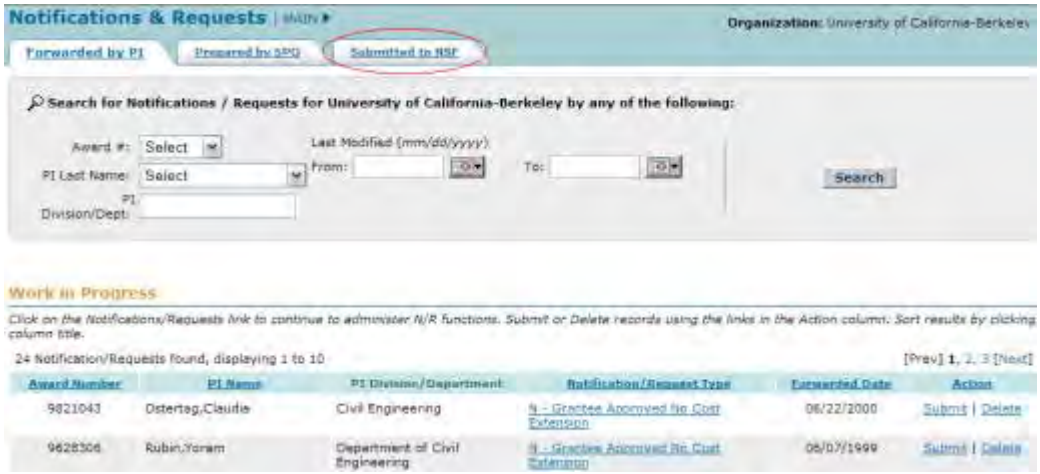

Figure 1 Notifications and Requests screen on the Forwarded by PI tab. The Submitted to NSF tab is circled.

2. On the **Notifications and Requests** screen on the **Forwarded by PI** tab (Figure 1), click the **Submitted to NSF** tab. The **Notifications and Requests** screen displays on the **Submitted to NSF** tab (Figure 2). You can search for notifications and requests by any of these criteria:
   - Award number
   - PI Last name and/or PI Division/Dept.
   - Date last modified

   On this screen, you can also:
   - View a submitted notification or request
   - View the award amendment to an approved notification or request

   (Click on a link above for instructions for that option.)

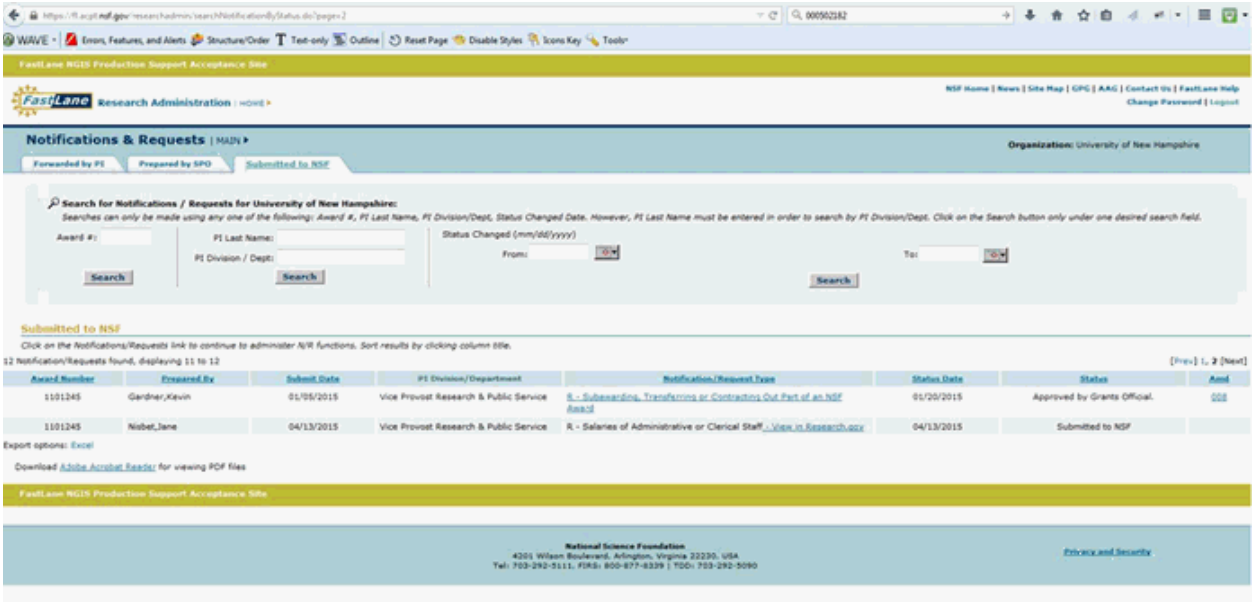

Figure 2 Notifications and Requests screen on the Submitted to NSF tab.

Search by Award Number for Submitted Notifications and Requests

1. In the **Award #** box of the **Notifications and Requests** screen on the **Submitted to NSF** tab (Figure 3), type the award number for the award whose notifications and requests you want to find.

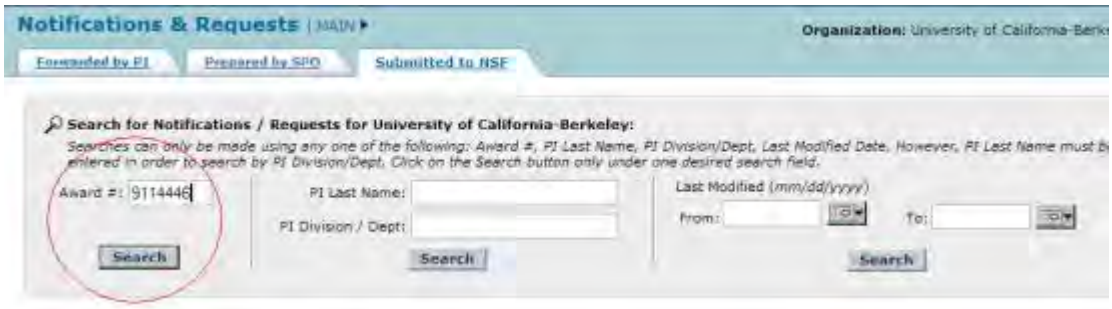

Figure 3 Notifications and Requests screen on the Submitted to NSF tab. The Award # box and the Search button are circled.

2. Click the **Search** button (Figure 3). The **Notifications and Requests** screen displays on the **Submitted to NSF** tab (Figure 4). The submitted notifications and requests for that award are listed in the **Submitted to NSF** section with their status.

Figure 4 Notifications and Requests screen on the Submitted to NSF tab. The Status column is circled.

Search by the PI and/or PI Division/Dept.

On the **Notifications and Requests** screen on the **Submitted to NSF** tab (Figure 5), you can search for submitted notifications and requests by either one or both of the following criteria:

- PI Last Name
- PI Division/Dept.

1. In the **PI Last Name** box (Figure 5), type the last name of the PI whose submitted requests and notifications you want to check.

Figure 5 Notifications and Requests screen on the Submitted to NSF tab. The section for PI Last Name and PI Division/Dept. are circled.

2. In the **PI Division/Dept.** box (Figure 5), type the name of the PI's division or department.
3. Click the **Search** button (Figure 5). The **Notifications and Requests** screen displays on the **Submitted to NSF** tab (Figure 6) with the submitted notifications and requests that meet your search criteria.

Figure 6 Notifications and Requests screen on the Submitted to NSF tab. The Status column is circled.

Search by the Date the Notification or Request Was Last Modified

1. On the **Notifications and Requests** screen on the **Submitted to NSF** tab (Figure 7), in the **From** box, type the start date for the date range you want to search for.

Figure 7 Notifications and Requests screen on the Submitted to NSF tab. The section for a search by the date last modified is circled.

2. In the **To** box (Figure 7), type the end date for the date range you want to search for.
3. Click the **Search** button (Figure 7). The **Notifications and Requests** screen displays on the **Submitted to NSF** tab (Figure 8). The notifications and requests in that date range are listed in the **Submitted to NSF** section.

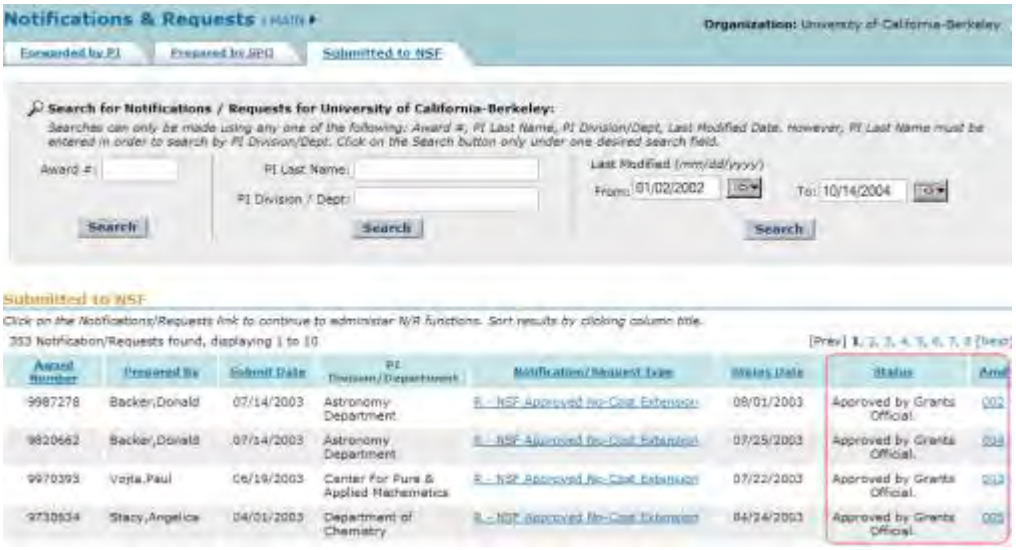

Figure 8 Notifications and Requests screen on the Submitted to NSF tab. The Status column is circled.

View a Submitted Notification or Request

1. On the **Notifications and Requests** screen on the **Submitted to NSF** tab (Figure 9), click the **Notification/Request Type** link on the row of the notification or request you want to view. The **View Notification** (or **View Request**) screen displays (Figure 10) with the contents of the submitted notification or request.

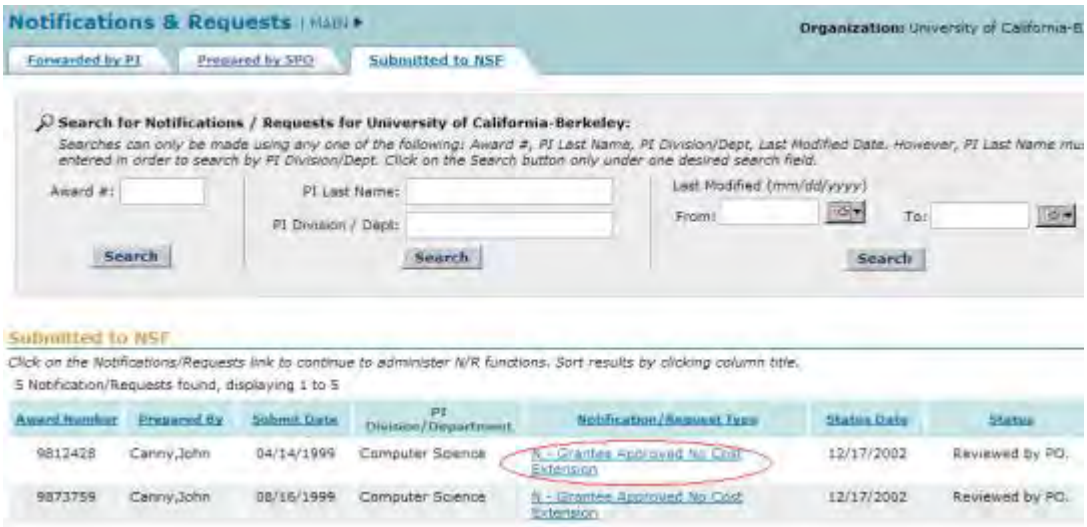

Figure 9 Notifications and Requests screen on the Submitted to NSF tab. The Notification / Request Type link is circled for a notification.

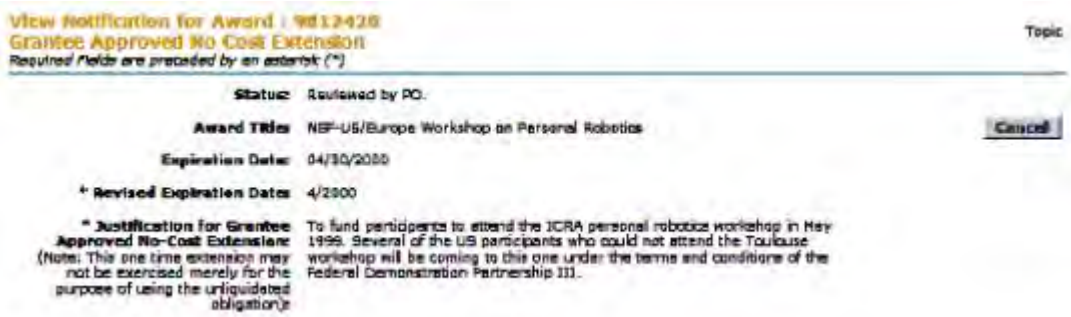

Figure 10 View Notification screen.

2. Click the **Cancel** button to return to the **Notifications and Requests** screen on the **Submitted to NSF** tab (Figure 9).

View the Award Amendment for an Approved Notification or Request as an SPO/AOR

1. Access the **Notifications and Requests** screen on the **Submitted to NSF** tab and search for notifications and requests as you require (see Check the Status of Submitted Notifications and Requests). The **Notifications and Requests** screen displays (Figure 1) with the notifications and requests you searched for.

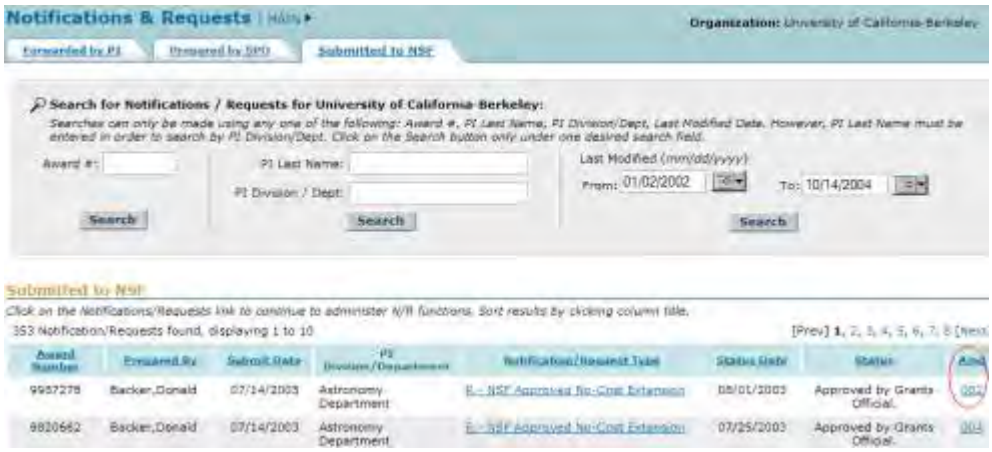

Figure 1 Notifications and Requests screen on the Submitted to NSF tab. The Amd (Amendment) number is circled for an approved request.

2. Find a notification or request that has the status of "Approved by Grants Official" (Figure 1).
3. Click the number in the **Amd** column on the row for the approved notification or request (Figure 1). The **National Science Foundation** screen displays (Figure 2) with the text of the amendment.

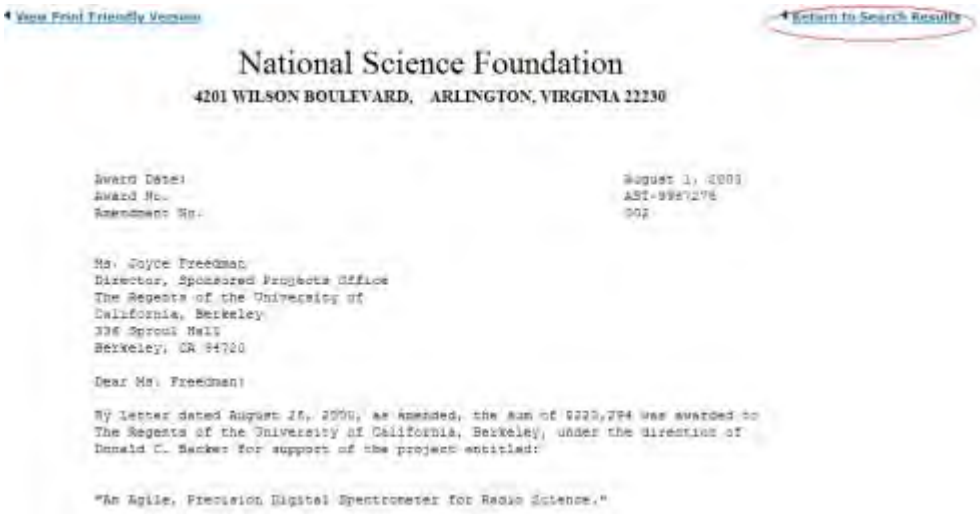

Figure 2 National Science Foundation screen. The Return to Search Results link is circled.

4. Click **Return to Search Results** (Figure 2). The **Notifications and Requests** screen displays on the **Submitted to NSF** tab (Figure 1).

Notifications

Notifications

Print the contents of the Notifications book.

You can prepare the following types of notifications:

- Annual Cost Share Notification by Recipient (SPO/AOR only)

After you have initiated a notification, you have these options for working:

- Modify a notification
- Forward a notification to the SPO
- Submit a notification to NSF (AOR only)
- Delete a notification

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What Is the Grantee-Approved No-Cost Extension Notification?

If you require a one-time extension of the grant expiration date to assure completion of the original scope of work with the funds already available, you must notify your NSF Program Officer through FastLane at least 10 days before the award expiration date specified in the grant consistent with the Award and Administration Guide (AAG) Chapter I.D.3.c(i).

The one-time extension may be for a period of up to 12 months. This one-time extension may not be exercised merely for the purpose of using unliquidated balances. NSF will not issue an amendment to the grant for a one-time grantee-approved no-cost extension.

The notification *must* contain:

- The revised expiration date
- The justification for the grantee-approved no-cost extension

Prepare a Grantee-Approved No-Cost Extension Notification

1. Access the **Prepare a New Notification or Request** screen (Figure 1) (see Prepare a New Notification or Request as a PI or Prepare a New Notification or Request as an SPO).

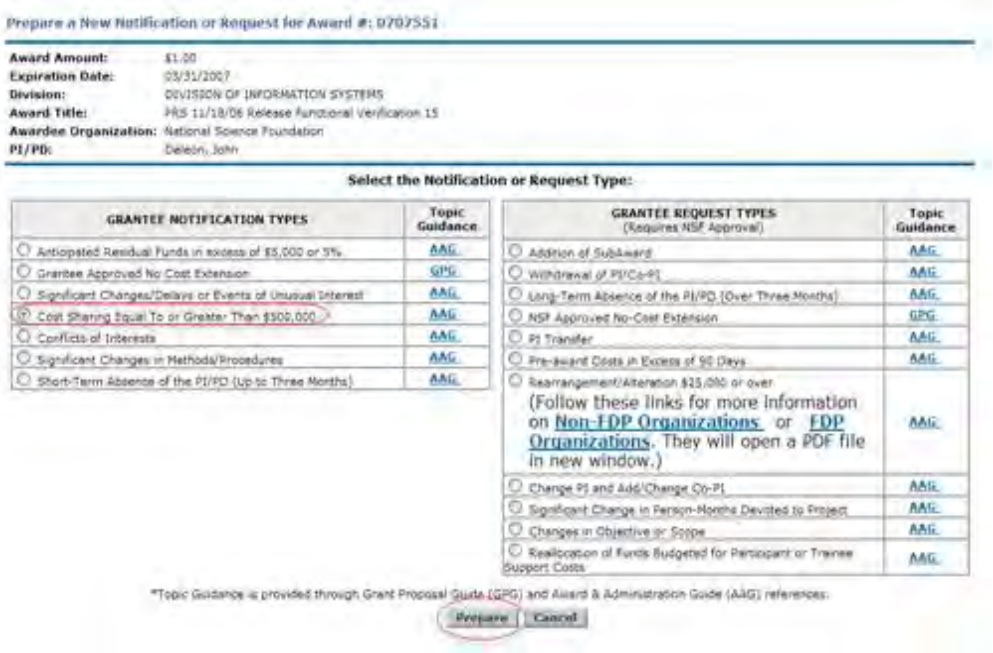


Figure 1 Prepare a New Notification or Request screen. The radio button for Grantee-Approved No-Cost Extension and the Prepare button are circled.

2. On the **Prepare a New Notification or Request** screen (Figure 1), click the radio button for Grantee-Approved No-Cost Extension in the **Grantee Notification Types** list.
3. Click the **Prepare** button (Figure 1). The **Modify Notification for Grantee-Approved No-Cost Extension** screen displays (Figure 2).

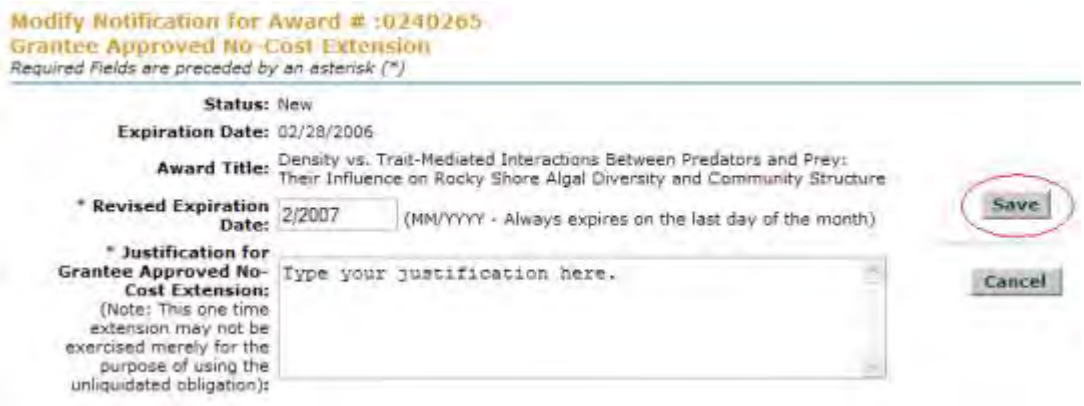


Figure 2 Modify Notification for Grantee-Approved No-Cost Extension screen. The Save button is circled.

4. In the **Revised End Date** box (Figure 2), type the revised expiration date (in mm/yyyy format).
5. In the **Justification** box (Figure 2), type or copy and paste the justification for the no-cost extension.
6. Click the **Save** button (Figure 2). The **View Notification Grantee-Approved No-Cost Extension** screen displays (Figure 3). You have these options:
   - Modify the notification

- Forward the notification to the SPO or Submit to NSF
- Delete the notification

Figure 3 View Notification for Grantee-Approved No-Cost Extension screen.

7. If you choose to **Forward the Notification to the SPO** or **Submit to NSF** you will receive a warning indicating the action may not be reversed once it is submitted (Figure 4).

Figure 4 Grantee-Approved No-Cost Extension Warning screen.

What Is the Annual and Final Cost Share Notification by Recipient?

Only an SPO/AOR may prepare a Cost Sharing Notification and only an AOR may submit.

If an award involves cost sharing, the amount of cost sharing is reflected on line M of the approved budget. Consistent with the guidance in 2 CFR 200.306, the commitment of these funds is legally binding and is subject to audit..

NSF must ensure annual certification of awards with cost sharing as outlined in the Award and Administration Guide (AAG) Chapter II.C.2. and 3.
The notification *must* contain:

- The start and end dates of the reporting period
- The amount of cost sharing for the current reporting period

- The cumulative amount of cost sharing reported to date, including the amount of cost sharing for the reporting period
- The cost sharing notification type (annual or final)
- An explanation for the cost sharing

Prepare an Annual or Final Cost Share Notification by Recipient

1. Access the **Prepare a New Notification or Request** screen (Figure 1) (see Prepare a New Notification or Request as an SPO/AOR).

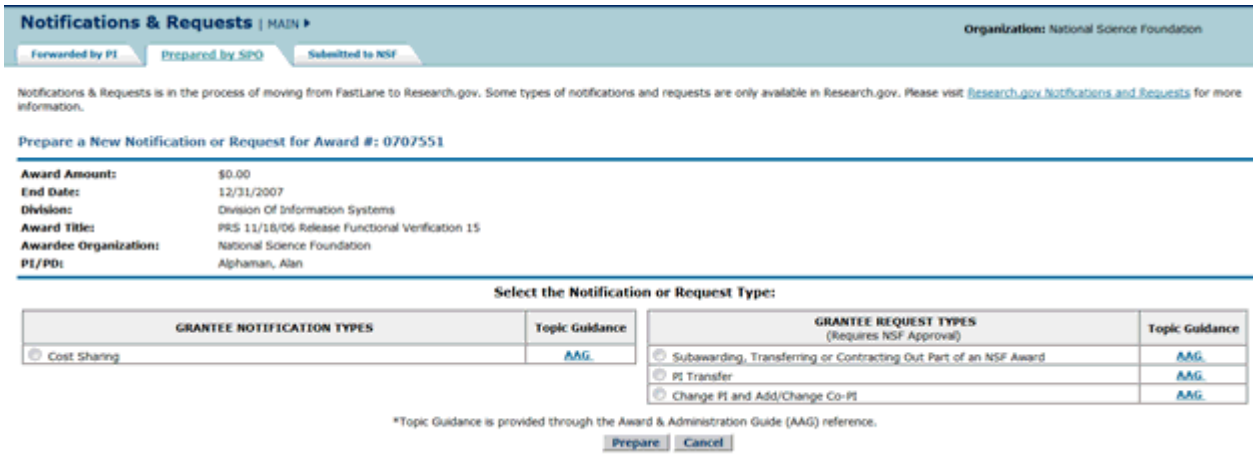


Figure 1 Prepare a New Notification or Request screen. Select the radio button for Cost Sharing and then the Prepare button.

2. On the **Prepare a New Notification or Request** screen (Figure 1), click the radio button for Cost Sharing.
3. Click the **Prepare** button (Figure 1). The **Notification for Award Cost Sharing** screen displays (Figure 2).

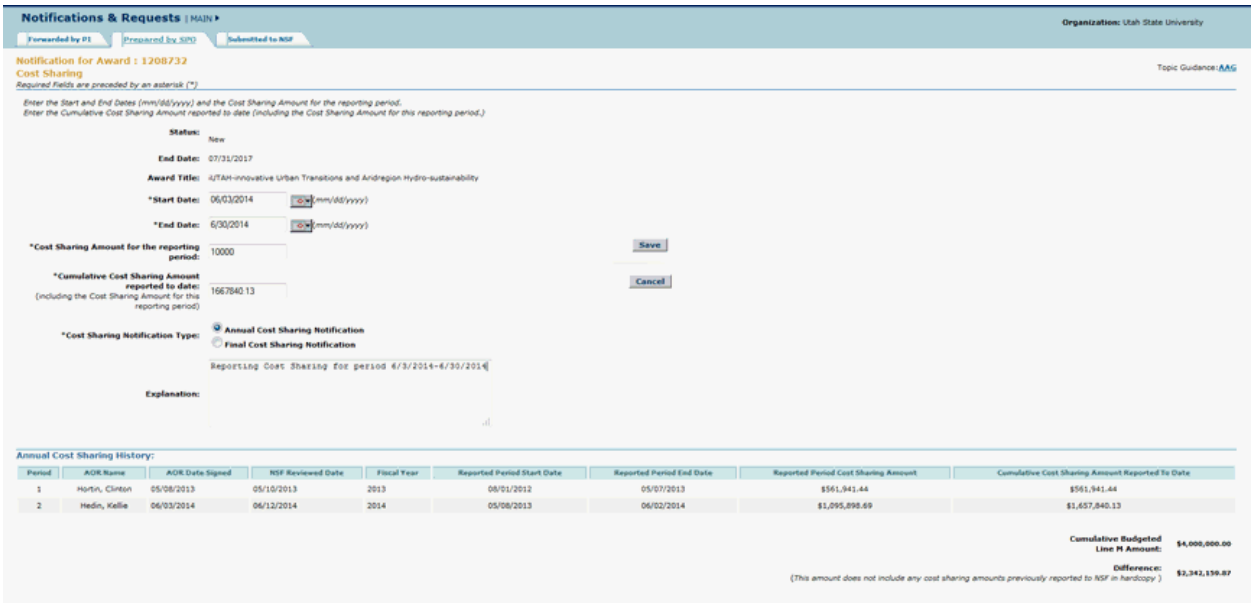


Figure 2 Notification for Cost Sharing.

4. In the **Start Date** box (Figure 2), type the start date for the reporting period (in mm/dd/yyyy format).
5. In the **End Date** box (Figure 2), type the end date for the reporting period (in mm/dd/yyyy format).
6. In the **Cost Sharing Amount for the Reporting Period** box (Figure 2), type the amount of cost sharing for this reporting period (no dollar sign, no commas).
7. In the **Cumulative Cost Sharing Amount Reported to Date** (Figure 2), type the cumulative amount of cost sharing for the award, including for this reporting period (no dollar sign, no commas).
8. For **Cost Sharing Notification Type** (Figure 2), click the radio button for either of the following:
   - Annual Cost Sharing Notification
   - Final Cost Sharing Notification
9. In the **Explanation** box (Figure 2), type an explanation for the.
10. Click the **Save** button (Figure 2). The **View Notification for Cost Sharing** screen displays (Figure 3). You have these options:
    - Modify the notification
    - Submit the notification to NSF (AOR only)
    - Delete the notification

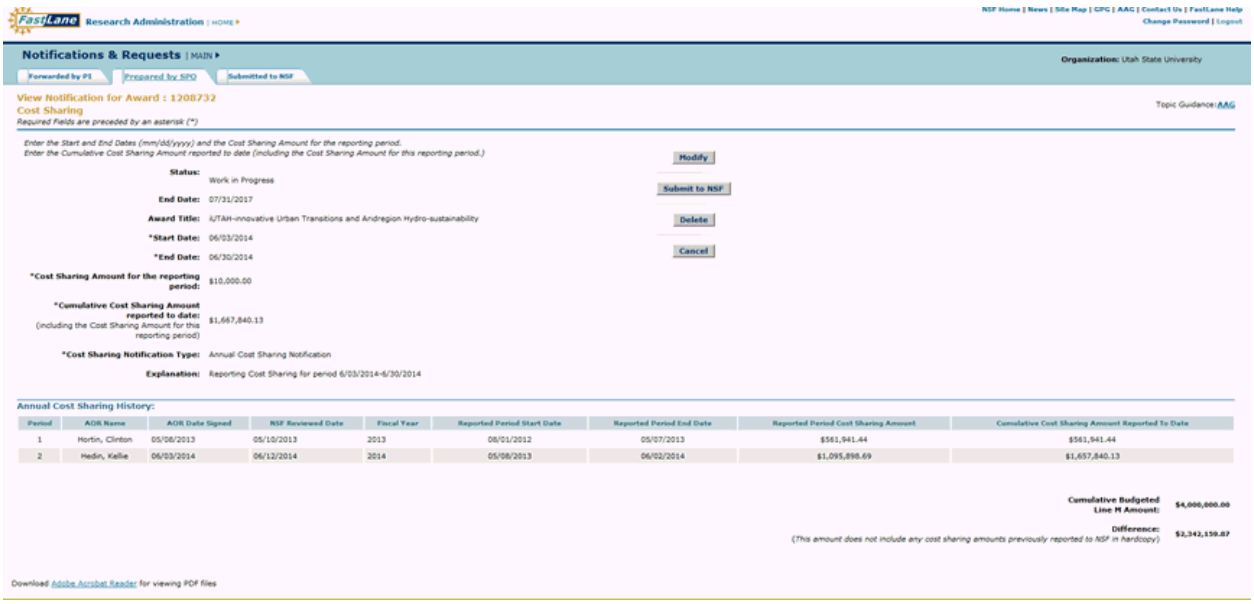


Figure 3 View Notification for Cost Sharing.

What Is the Short-Term Absence of the PI/PD (Up to 3 Months) Notification?

If the PI will be absent from the project for a period not longer than 3 months, you must notify your NSF Program Officer through FastLane.

The notification *must* contain:

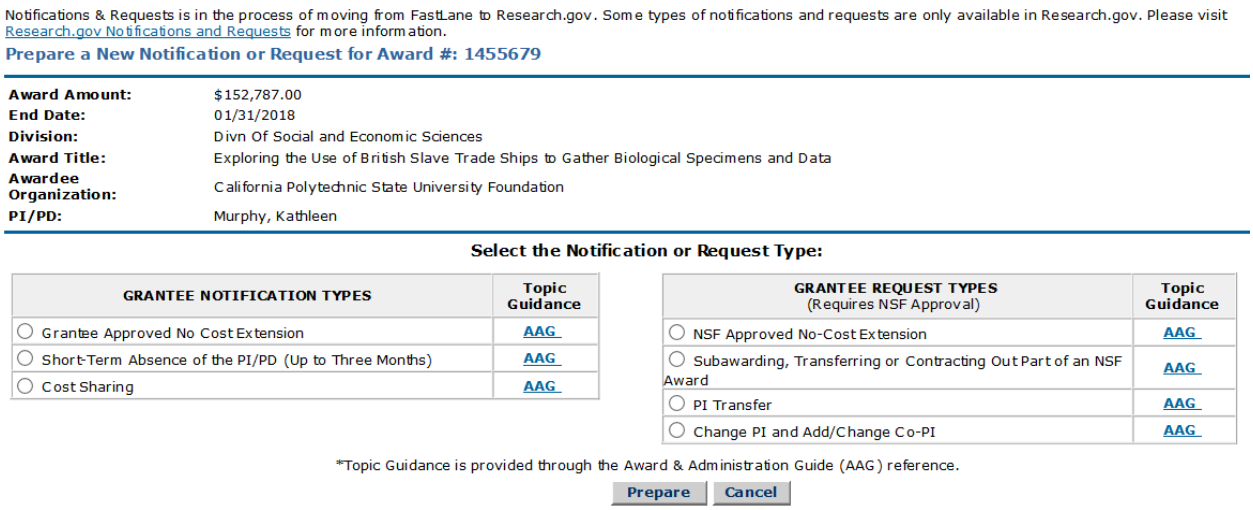
- The start and end dates of the period of absence
- The justification for the PI's absence

- The arrangement for conducting the project during the PI's absence

Note: The PI or Co-PI submits a Notification of Short-Term Absence of the PI/PD directly to NSF.

Prepare a Short-Term Absence of the PI Request

1. Access the **Prepare a New Notification or Request** screen (Figure 1) (see Prepare a New Notification or Request as a PI or Prepare a New Notification or Request as an SPO).


Notifications & Requests is in the process of moving from FastLane to Research.gov. Some types of notifications and requests are only available in Research.gov. Please visit Research.gov Notifications and Requests for more information.

Prepare a New Notification or Request for Award #: 1455679

Award Amount:	$152,787.00
End Date:	01/31/2018
Division:	Divn Of Social and Economic Sciences
Award Title:	Exploring the Use of British Slave Trade Ships to Gather Biological Specimens and Data
Awardee Organization:	California Polytechnic State University Foundation
PI/PD:	Murphy, Kathleen

Select the Notification or Request Type:

GRANTEE NOTIFICATION TYPES	Topic Guidance
Grantee Approved No Cost Extension	AAG
Short-Term Absence of the PI/PD (Up to Three Months)	AAG
Cost Sharing	AAG

GRANTEE REQUEST TYPES (Requires NSF Approval)	Topic Guidance
NSF Approved No-Cost Extension	AAG
Subawarding, Transferring or Contracting Out Part of an NSF Award	AAG
PI Transfer	AAG
Change PI and Add/Change Co-PI	AAG

*Topic Guidance is provided through the Award & Administration Guide (AAG) reference.

Prepare Cancel

Figure 1 Prepare a New Notification or Request screen. Select the radio button for Short-Term Absence of the PI/PD and then the Prepare button.

2. On the **Prepare a New Notification or Request** screen (Figure 1), click the radio button for Short-Term Absence of the PI/PD in the **Grantee Notification Types** list.
3. Click the **Prepare** button (Figure 1). The **Notification for Short-Term Absence of the PI/PD** screen displays (Figure 2).

Modify Notification for Award : 0310950

Short-Term Absence of the PI/PD (Up to Three Months)

Required Fields are preceded by an asterisk (*)

Status: New

Expiration Date: 08/31/2007

Award Title: NIRT: Bio-Nano-Robotic Systems Using Viral Protein Nano Motors

***From Date:** 10/01/2004 (mm/dd/yyyy)

***To Date:** 12/01/2004 (mm/dd/yyyy)

***Justification for Short-Term Absence of the PI/PD:** Type the justification for the absence here.

***Arrangements for Conduct of Project During PIs Absence:** Describe the arrangements for conducting the project during the PI's absence.

Save Cancel

Figure 2 Modify Notification for Short-Term Absence of the PI/PD screen. The Save button is circled.

4. In the **From Date** box (Figure 2), type the date on which the PI's absence begins (in mm/dd/yyyy format).
5. In the **To Date** box (Figure 2), type the date on which the PI's absence ends (in mm/dd/yyyy format).
6. In the **Justification for Short-Term Absence of the PI/PD** box (Figure 2), type or copy and paste the justification for the PI's absence.
7. In the **Arrangements for Conduct of Project During PI's Absence** box (Figure 2), type or copy and paste the arrangements for the project's continuation during the PI's absence.
8. Click the **Save** button (Figure 2). The **View Notification for Short-Term Absence of PI/PD** screen displays (Figure 3). You have these options:
   - Modify the notification
   - Submit the notification to NSF
   - Delete the notification

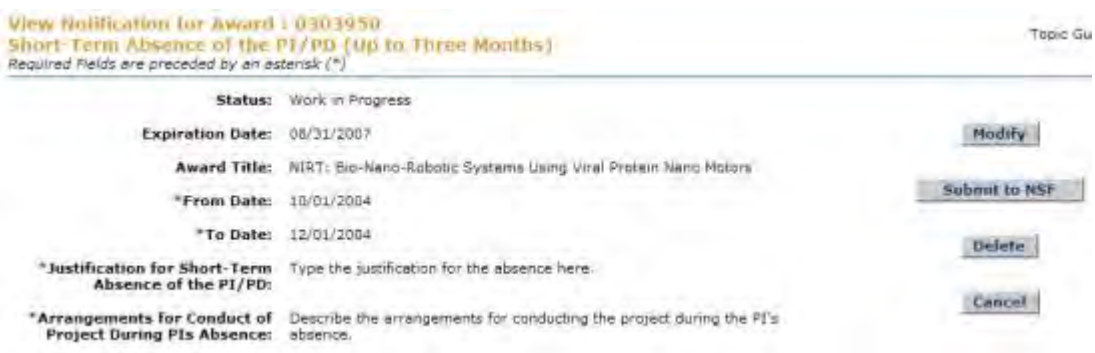


Figure 3 View Notification for Short-Term Absence of the PI/PD screen.

Notification Functions

Notifications Functions Introduction

Once a notification is created, you have these options for further action:

- Modify a Notification
- Forward a Notification to the SPO
- Submit a Notification to NSF (AOR only)
- Delete a Notification

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- Modify a Notification
- Forward a Notification to the SPO
- Submit a Notification to NSF (AOR only)
- Delete a Notification

Modify a Notification

1. Access the **View Notifications** screen (for the Anticipated Residual Funds Request, as an example) (Figure 1). See one of the following:
   - Instructions for the type of notification you are working on

- If you are a PI, see View a Notification Prepared by the PI.
- If you are an SPO, see View a Notification Prepared by the SPO or View a Notification Forwarded by the PI.

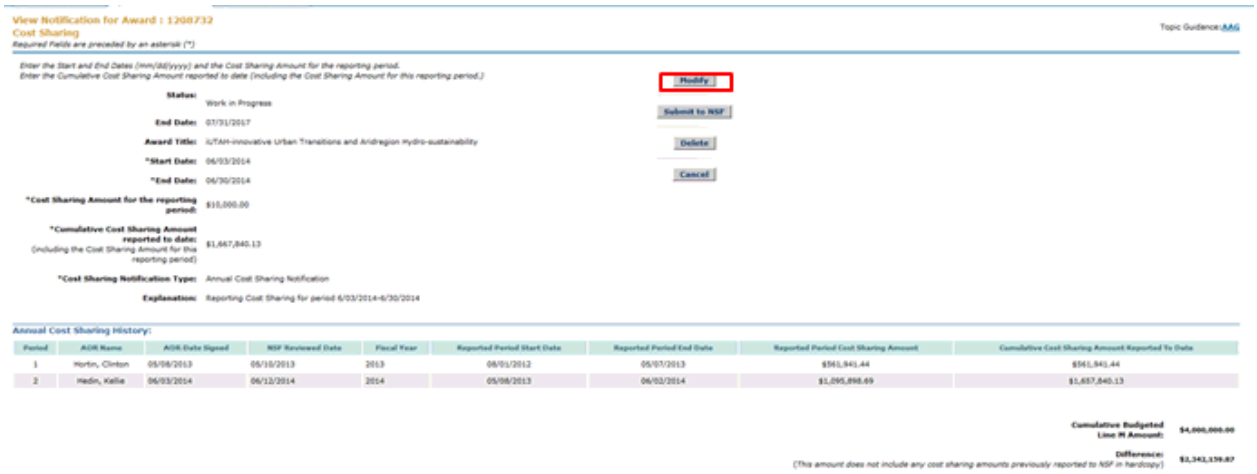

Figure 1 View Notification screen. The Modify button is circled.

2. On the **View Notification** screen for your type of notification (Figure 1), click the **Modify** button (Figure 1). The **Modify Notification** screen displays (Figure 2).

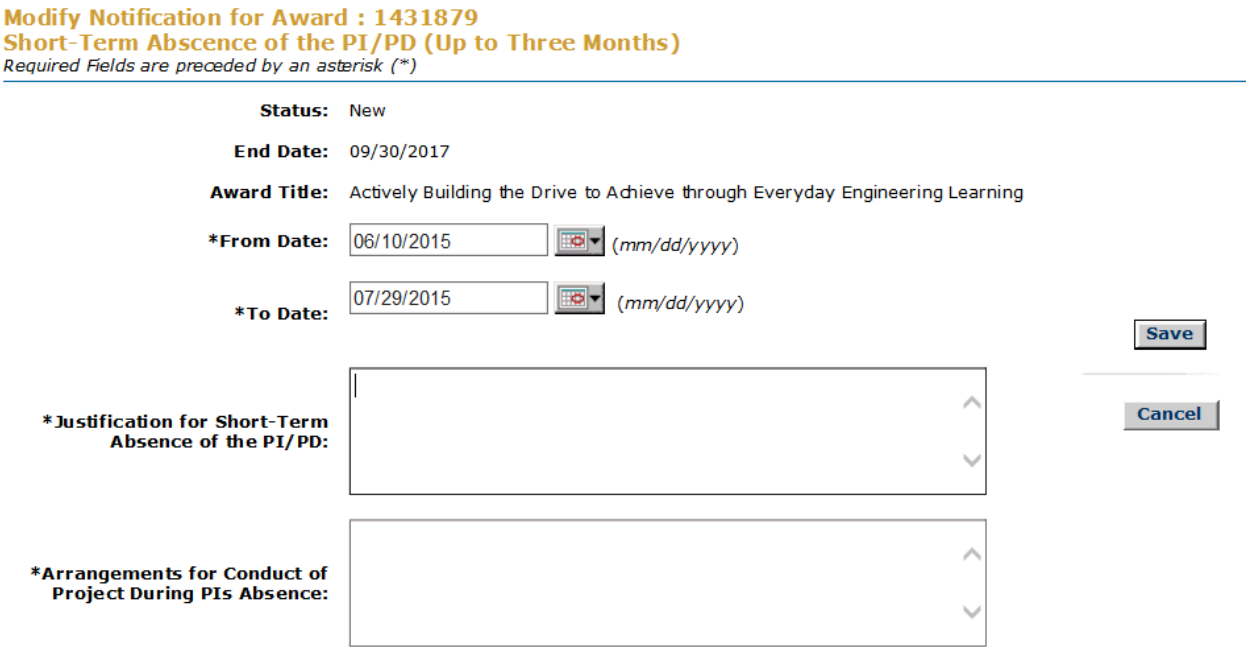

Figure 2 Modify Notification screen.

3. Modify the notification as you require (see the instructions for the type of notification you are working on).

4. Click the **Save** button (Figure 2). The **View Notification** screen displays (Figure 3) with the changed information.

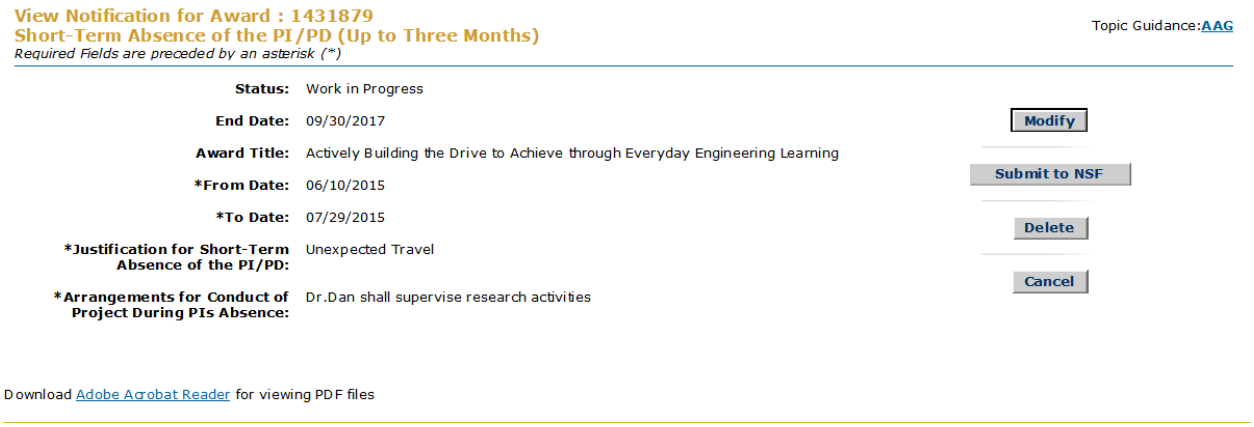

Figure 3 View Notification screen with the modifications.

Forward a Notification to the SPO

Only a PI or Co-PI can forward a notification to the SPO.

1. Access the **View Notifications** screen (for Anticipated Residual Funds, as an example) (Figure 1) (see View a Notification Prepared by the PI or the instructions for the type of notification you are working on).

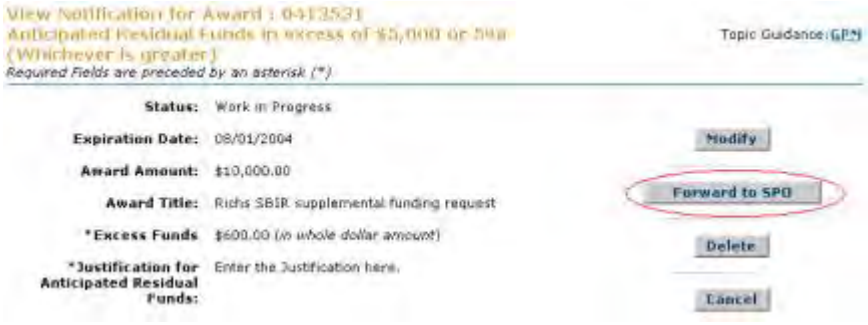

Figure 1 View Notification screen. The Forward to SPO button is circled.

2. On the **View Notification** screen (Figure 1), click the **Forward to SPO** button. The **Forward Notification** screen displays (Figure 2). At the top of the screen is a message for you to confirm that you want to forward the notification to the SPO.

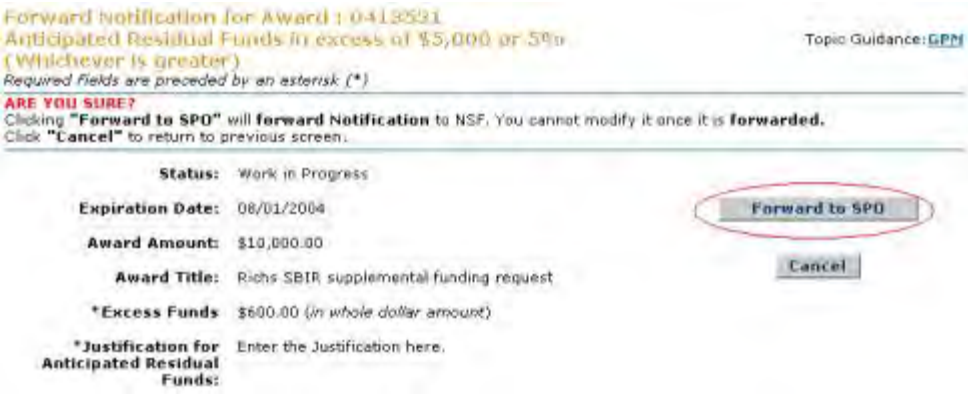

Figure 2 Forward Notification screen. The Forward to SPO button is circled.

3. Click the **Forward to SPO** button (Figure 2). The **Forwarded** screen displays (Figure 3) with the message that the notification has been sent to the SPO.

Figure 3 Forwarded screen. The Search Prepared by PI List link is circled.

4. Click **Search Prepared by PI List** (Figure 3). The **Notifications and Requests** screen displays on the **Prepared by PI** tab.

Submit a Notification to NSF (AOR only)

An AOR may submit to NSF *all* notification types.

1. Access the **View Notification** screen. See one of the following:
   - Instructions for the type of notification you are working on
   - If you are a PI, View a Notification Prepared by the PI.
   - If you are an SPO/AOR, View a Notification Prepared by the SPO or View a Notification Forwarded by the PI.

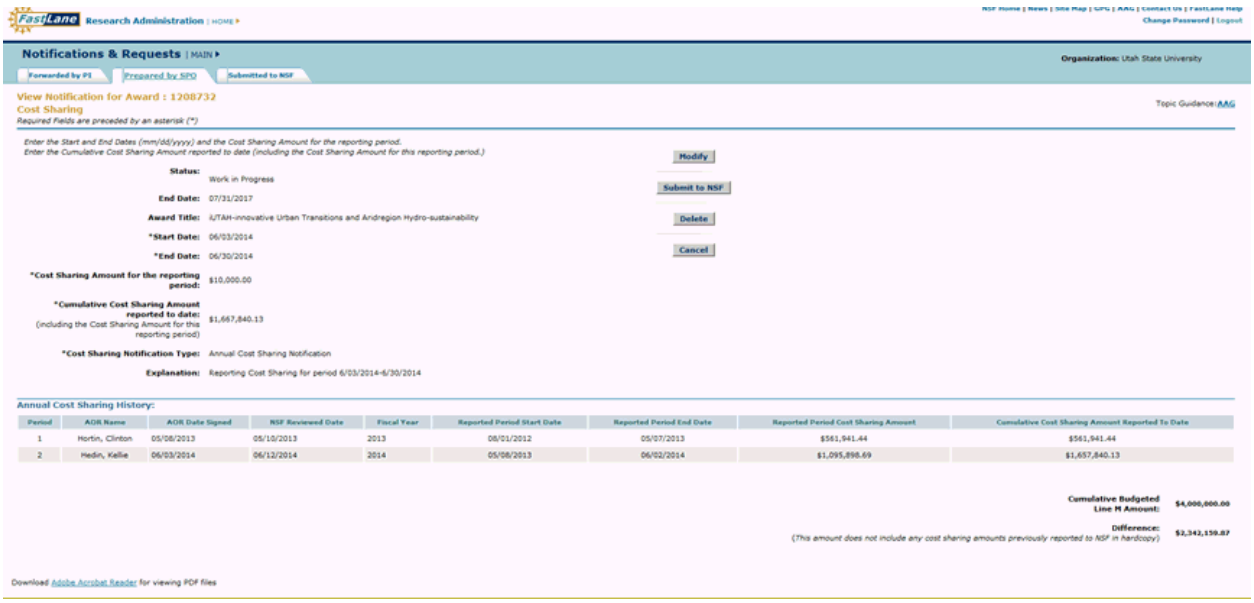

Figure 1 View Notification screen. The Submit to NSF button is circled.

2. On the **View Notification** screen (Figure 1), click the **Submit to NSF** button. The **Submit Notification** screen displays (Figure 2). At the top of the screen is a message for you to confirm that you want to submit the notification to NSF.

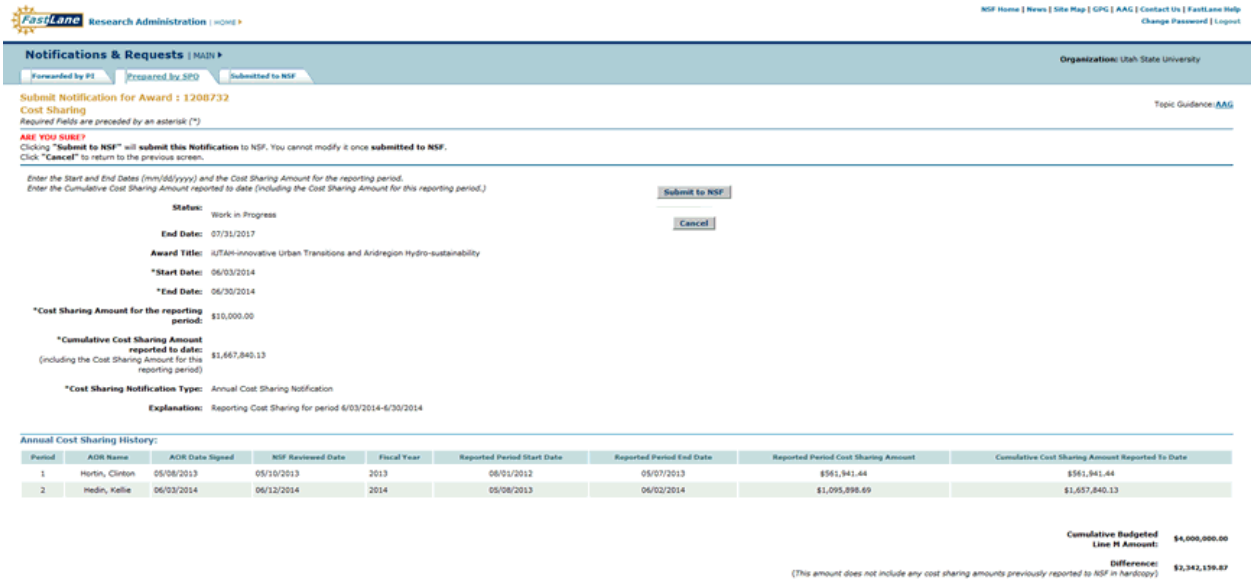

Figure 2 Submit Notification screen with a message for you to confirm that you want to submit the notification to NSF.

3. Click the **Submit to NSF** button (Figure 2). The **Submitted** screen displays (Figure 3) with the message that the notification has been submitted to NSF.

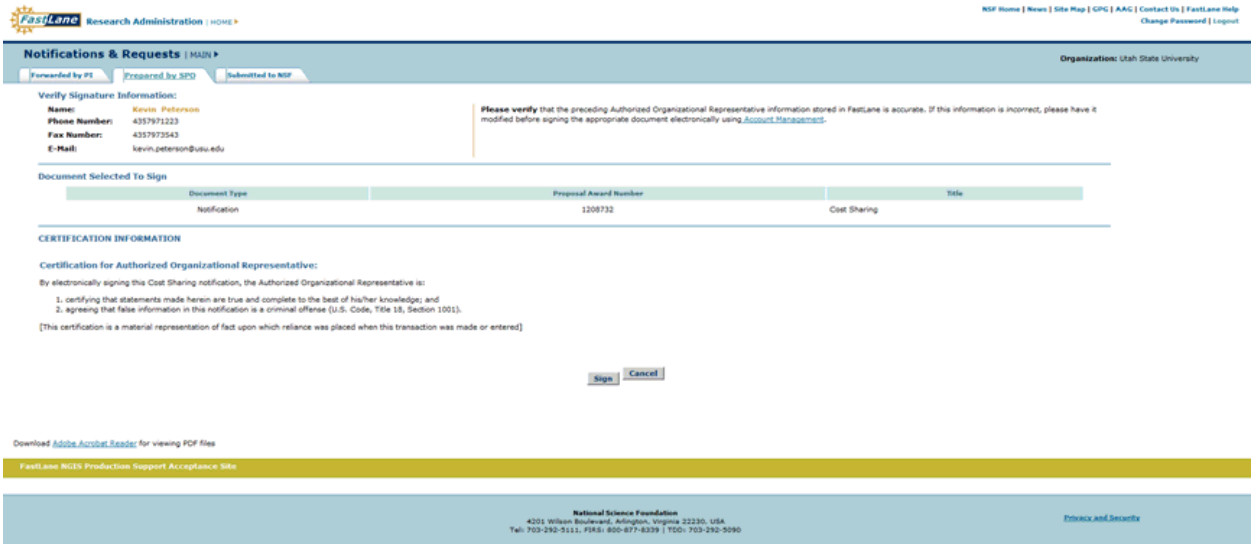

Figure 3 Submitted screen.

4. Click **Search Prepared by SPO List** (Figure 3). The **Notifications and Requests** screen displays on the **Prepared by SPO** tab. (If you are a PI, the **Search Prepared by PI List** link displays on the **Submitted** screen. When you click on the link, the **Notifications and Requests** screen displays on the **Prepared by PI** tab.)

Delete a Notification

1. Access the **View Notifications** screen (for Anticipated Residual Funds, as an example) (Figure 1). See one of the following:
   - Instructions for the type of notification you are working on
   - If you are a PI, see View a Notification Prepared by the PI.
   - If you are an SPO, see View a Notification Prepared by the SPO or View a Notification Forwarded by the PI.

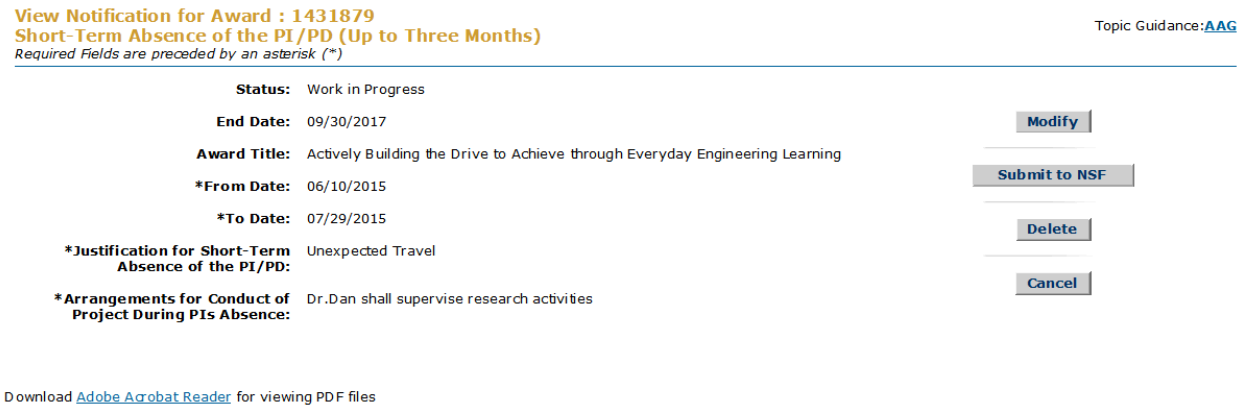

Figure 1 View Notification screen.

2. On the **View Notification** screen (Figure 1), click the **Delete** button (Figure 1). The **Delete Notification** screen displays (Figure 2). At the top of the screen is a message for you to confirm that you want to delete the notification.

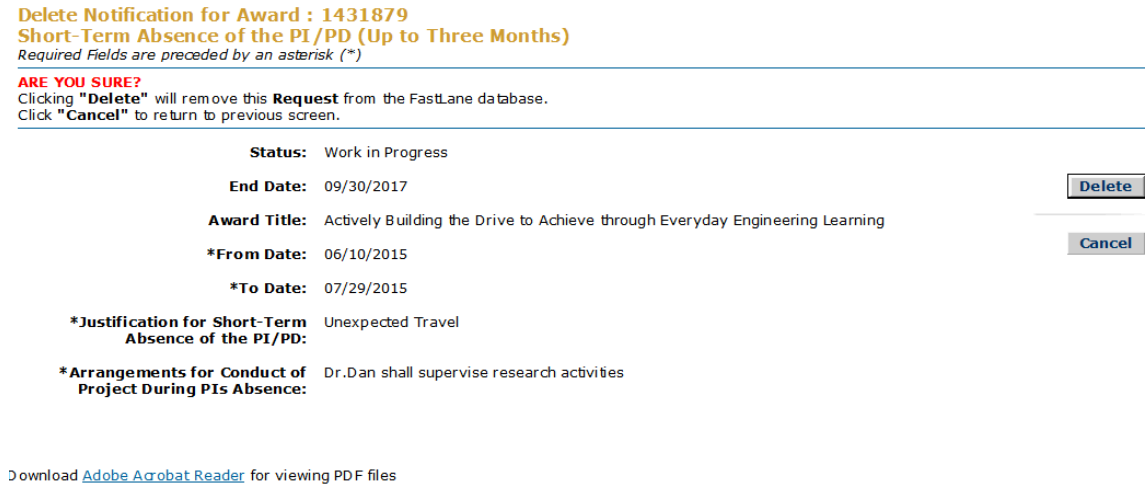

Figure 2 Delete Notification screen with a message for you to confirm that you want to delete the notification.

3. Click the **Delete** button (Figure 2). The **Deleted** screen displays (Figure 3) with the message that the notification has been deleted.

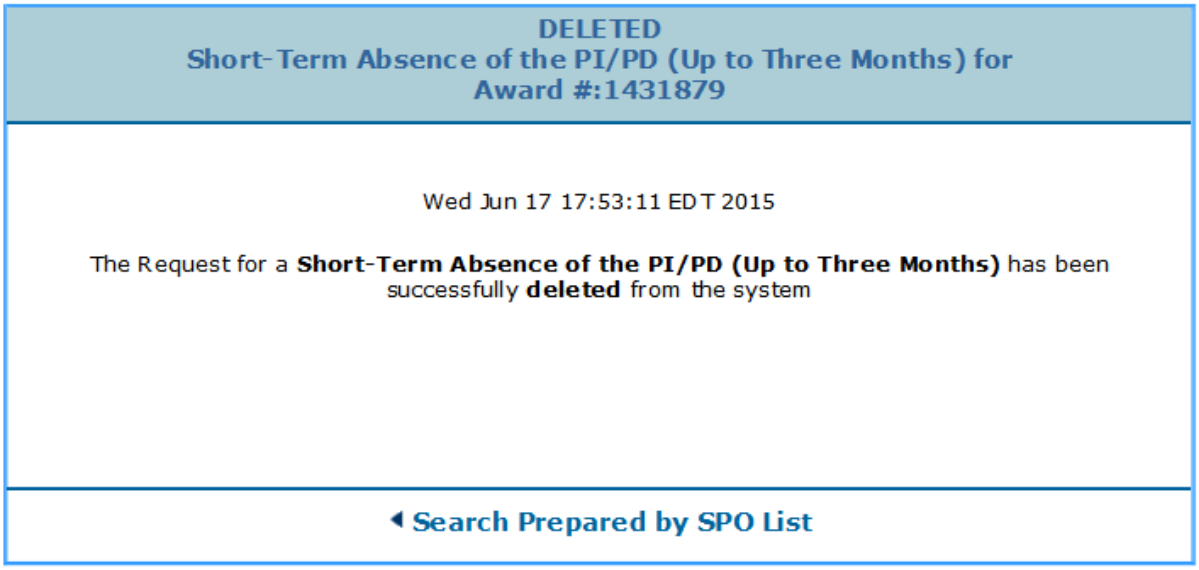

Figure 3 Deleted screen.

4. Click the **Search Prepared by SPO List** (Figure 3). The **Notifications and Requests** screen displays on the **Prepared by SPO** tab. (If you are a PI, the **Search Prepared by PI List** link displays on the **Deleted** screen. When you click the link, the **Notifications and Requests** screen displays on the **Prepared by PI** tab.)

Requests

Print the contents of the Requests book.

Notifications and Requests is in the process of moving from FastLane to Research.gov. Some types of notifications and requests are only available in Research.gov. Please visit Research.gov Notifications and Requests for more information.

You can prepare the following types of requests in FastLane:

- Subawarding, Transferring or Contracting Out Part of an Award
- PI Transfer
- Change PI Add/Change PI/Co-PI

After you have initiated a request, you have these options for working:

- Modify a request
- Forward a request to the SPO
- Submit a request to NSF (AOR only)
- Delete a request

Subawarding, Transferring or Contracting Out a Part of an NSF Award Request

What Is the Subawarding, Transferring or Contracting Out a Part of an NSF Award Request?

Consistent with the *Proposal & Award Policies & Procedures Guide(PAPPG)* Chapter VII.B.3, if you are contracting out part of a project or transferring the project effort to another organization, you must submit a Subawarding, Transferring or Contracting Out a Part of anNSF Award Request for any subaward under an NSF grant.

You must have NSF authorization *before* any subaward is contracted.

The Subawarding, Transferring or Contracting Out a Part of an NSF Award Request *must* contain:

- A clear description of the work to be performed
- The basis for selection of the subreicipent organization (except for collaborative or joint arrangements)
- A separate budget and budget justification for each subaward

NSF indicates authorization by an amendment to the grant that the NSF Grants Officer signs. As outlined in the *Proposal & Award Policies & Procedures Guide* (*PAPPG* ChapterVII.B.3, NSF grant conditions identify which articles flow down to subrecipients.

See Prepare an Subawarding, Transferring or Contracting Out a Part of an NSF Award to begin working on a Subawarding, Transferring or Contracting Out a Part of an NSF Award Request.

The subaward organization can access the budget through a Co-PI at the subaward organization or circulation of the budget as a spreadsheet.

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See Prepare an Subawarding, Transferring or Contracting Out a Part of an NSF Award to begin working on a Subawarding, Transferring or Contracting Out a Part of an NSF Award Request.

The subaward organization can access the budget through a Co-PI at the subaward organization or circulation of the budget as a spreadsheet.

Prepare an Subawarding, Transferring or Contracting Out a Part of an NSF Award Request

1. Access the **Prepare a New Notification or Request** screen (Figure 1) (see Prepare a New Notification or Request as a PI or Prepare a New Notification or Request as an SPO/AOR).

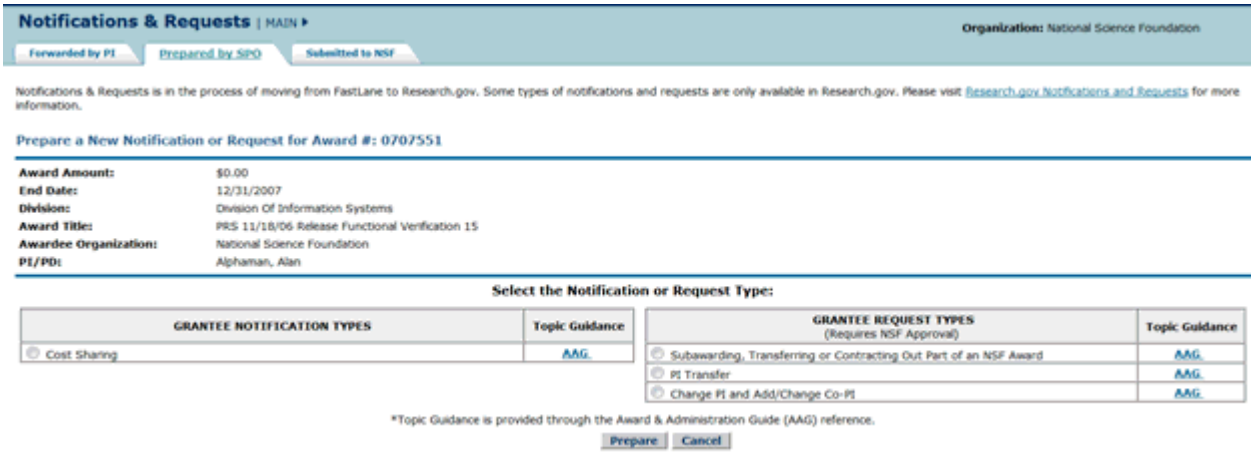


Figure 1 Prepare a New Notification or Request screen.

2. On the **Prepare a New Notification or Request** screen (Figure 1), click the radio button for Subawarding, Transferring or Contracting Out a Part of an NSF Award.
3. Click the **Prepare** button (Figure 1). The **Request for** Subawarding, Transferring or Contracting Out a Part of an NSF Award screen displays (Figure 2) with the number and

title of the award. It also shows if there are any pending Subawarding, Transferring or Contracting Out a Part of an NSF Award Request for that award.

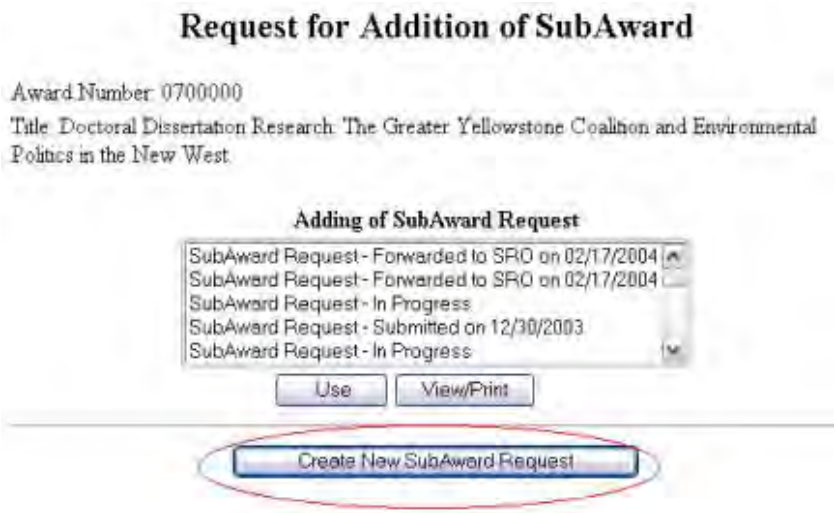


Figure 2 Request for Subawarding, Transferring or Contracting Out a Part of an NSF Award screen. The Create New Subaward Request button is circled.

4. Click the **Create New Subaward Request** button (Figure 2). The Subawarding, Transferring or Contracting Out a Part of an NSF Award **Form Preparation** screen displays (Figure 3) with the following forms:
   - Description of Work to be Performed (required)
   - Budgets (Including Justification) (required)
   - Add/Delete Senior Personnel (other than PI/Co-PI)
   - Justification for Subrecipient Selections (required)
   - Supplementary Documents

   (Click on a link for the instructions for that form.)

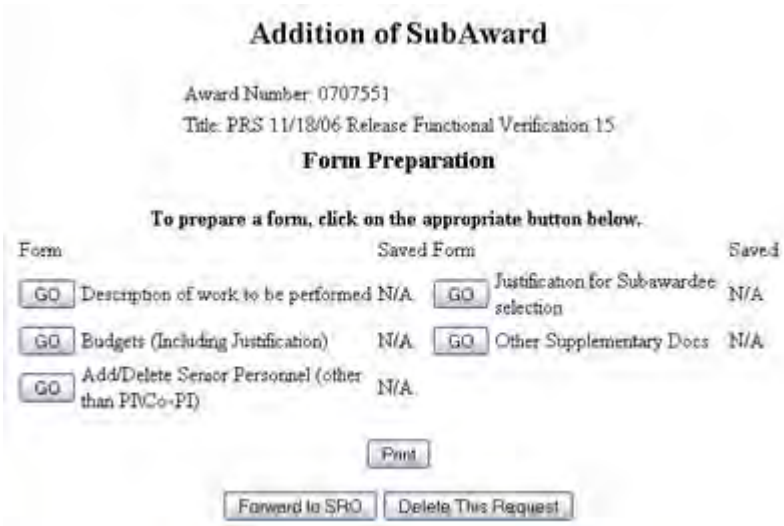


Figure 3 Subawarding, Transferring or Contracting Out a Part of an NSF Award Form Preparation screen.

The Subawarding, Transferring or Contracting Out a Part of an NSF Award Request Form Preparation screen (Figure 3) also gives you these options:

- Forward a subaward request to the SPO (for PI only)
- Delete a subaward request (for both PI and SPO)
- Submit a subaward request (for AOR only)

(Click on a link above for instructions for that option.)

To modify a Subawarding, Transferring or Contracting Out a Part of an NSF Award Request, on the **Subawarding, Transferring or Contracting Out a Part of an NSF Award Form Preparation** screen (Figure 3), click the **Go** button for any form and modify the form as you require.

Forward a Subawarding, Transferring or Contracting Out a Part of an NSF Award Request to the SPO

Only a PI can forward a Subawarding, Transferring or Contracting Out a Part of an NSF Award Request to the SPO.

1. Access the **Subawarding, Transferring or Contracting Out a Part of an NSF Award Form Preparation** screen (Figure 1) (see Prepare an Subawarding, Transferring or Contracting Out a Part of an NSF Award Request).

Figure 1 Subawarding, Transferring or Contracting Out a Part of an NSF Award Form Preparation screen. The Forward to SPO button is circled.

2. On the **Subawarding, Transferring or Contracting Out a Part of an NSF Award Form Preparation screen** (Figure 1), click the **Forward to SPO** button. The **Subaward Request Was Forwarded** screen displays (Figure 2) with the message that FastLane has forwarded the request to the SPO.

Figure 2 Subaward Request Was Forwarded screen.

3. Click the **Go Back** button (Figure 2). The **Request for Subawarding, Transferring or Contracting Out a Part of an NSF Award** screen displays.

Submit a Subawarding, Transferring or Contracting Out a Part of an NSF Award Request (AOR only)

Only the AOR may submit a Subawarding, Transferring or Contracting Out a Part of an NSF Award Request to NSF.

1. Access the **Subawarding, Transferring or Contracting Out a Part of an NSF Award Form Preparation** screen (Figure 1) (see Prepare an Subawarding, Transferring or Contracting Out a Part of an NSF Award Request).

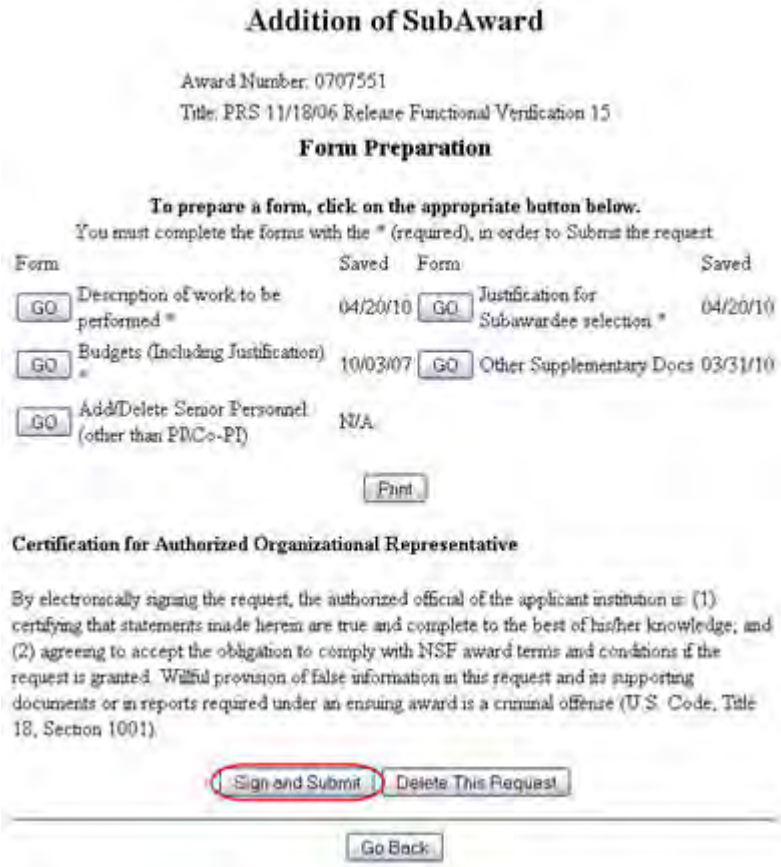


Figure 1 Subawarding, Transferring or Contracting Out a Part of an NSF Award Form Preparation screen. The Sign and Submit button is circled.

2. On the **Subawarding, Transferring or Contracting Out a Part of an NSF Award Form Preparation** screen (Figure 1), click the **Sign and Submit** button. The **Subaward Request was Submitted and Signed** screen displays (Figure 2) with the message that the Subaward Request was submitted and signed.

Figure 2 Subaward Request was Submitted and Signed screen.

3. Click the **Go Back** button (Figure 2). The **Request for Subawarding, Transferring or Contracting Out a Part of an NSF Award** screen displays.

Delete an Subawarding, Transferring or Contracting Out a Part of an NSF Award Request

1. Access the **Subawarding, Transferring or Contracting Out a Part of an NSF Award Form Preparation** screen (Figure 1) (see Prepare an Subawarding, Transferring or Contracting Out a Part of an NSF Award Request).

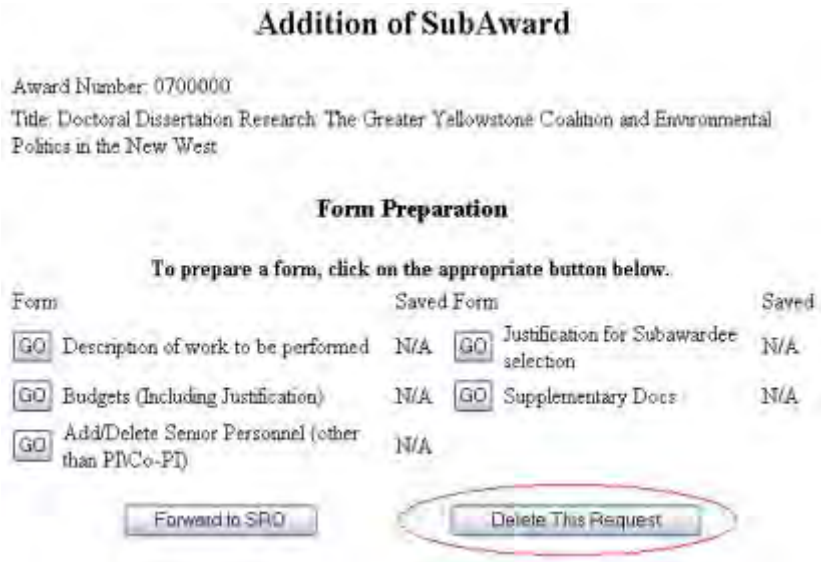


Figure 1 Subawarding, Transferring or Contracting Out a Part of an NSF Award Form Preparation screen. The Delete This Request button is circled.

2. On the **Subawarding, Transferring or Contracting Out a Part of an NSF Award Form Preparation** screen (Figure 1), click the **Delete This Request** button. The

Subaward Request Was Deleted screen displays (Figure 2) with the message that FastLane has deleted the request.

Figure 2 Subaward Request Was Deleted screen.

3. Click the **Go Back** button (Figure 2). The **Request for Subawarding, Transferring or Contracting Out a Part of an NSF Award** screen displays.

Forms for Subawarding, Transferring or Contracting Out a Part of an NSF Award Request

Forms for Subawarding, Transferring or Contracting Out a Part of an NSF Award

The Subawarding, Transferring or Contracting Out a Part of an NSF Award has the following forms for completion:

- Description of Work to be Performed (required)
- Budgets (Including Justification) (required)
- Add/Delete Senior Personnel
- Justification for Recipient Selection (required)
- Supplementary Documents

Forms for Subawarding, Transferring or Contracting Out a Part of an NSF Award

The Subawarding, Transferring or Contracting Out a Part of an NSF Award has the following forms for completion:

- Description of Work to be Performed (required)
- Budgets (Including Justification) (required)
- Add/Delete Senior Personnel
- Justification for Recipient Selection (required)
- Supplementary Documents

Description of Work to be Performed for Subawarding, Transferring or Contracting Out a Part of an NSF Award

1. Prepare a word-processing document with the Description of Work to be Performed. See Acceptable Formats for FastLane for the many formats FastLane accepts for uploading.
2. Access the **Subawarding, Transferring or Contracting Out a Part of an NSF Award Form Preparation** screen (Figure 1) (see Prepare an Subawarding, Transferring or Contracting Out a Part of an NSF Award Request).

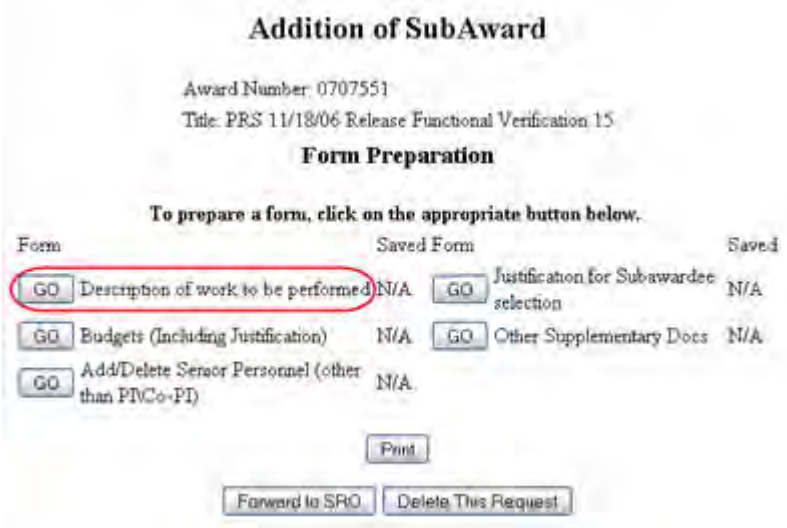


Figure 1 Subawarding, Transferring or Contracting Out a Part of an NSF Award Preparation screen. The Go button for Description of Work to be Performed is circled.

3. On the **Subawarding, Transferring or Contracting Out a Part of an NSF Award Form Preparation** screen (Figure 1), click the **Go** button for Description of Work to be Performed. The **Description of Work to be Performed File Upload** screen displays (Figure 2).

Figure 2 Description of Work to Be Performed File Upload screen.

4. See Upload a File for instructions on how to upload the description. When you have accepted the upload, the **Description of Work To Be Performed File Upload** screen (Figure 3) displays with these options:
   - Display Current Description of Work to Be Performed
   - Delete Current Description of Work to Be Performed
   - Upload a New Description of Work to Be Performed

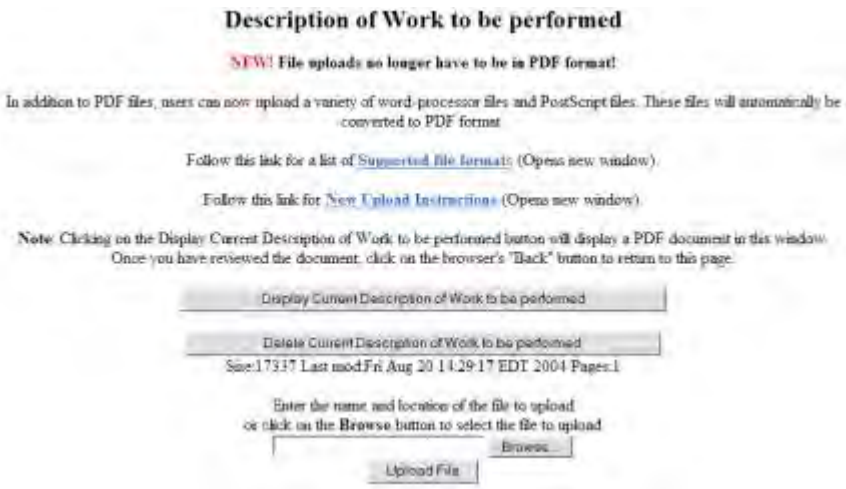


Figure 3 Description of Work to Be Performed File Upload screen with options for viewing or deleting the Description of Work to be Performed.

Display Current Description of Work to Be Performed

Click the **Display Current Description of Work to Be Performed** button (Figure 3). The file will display in PDF format. See Adobe Reader for FastLane, if you need to download Adobe Reader.

Delete Current Description of Work to Be Performed

1. Click the **Delete Current Description of Work to Be Performed** button (Figure 3). A screen displays with a message for you to confirm that you want to delete the file.
2. Click the **OK** button. The document is deleted.

Upload a New Description of Work to Be Performed

Follow the directions in Upload a File. Uploading a new Description of Work to Be Performed automatically replaces the file that was previously uploaded.

Budgets (Including Justification) for Subawarding, Transferring or Contracting Out a Part of an NSF Award

1. Access the **Subawarding, Transferring or Contracting Out a Part of an NSF Award Request Form Preparation** screen (Figure 1) (see Prepare a Subawarding, Transferring or Contracting Out a Part of an NSF Award Request).

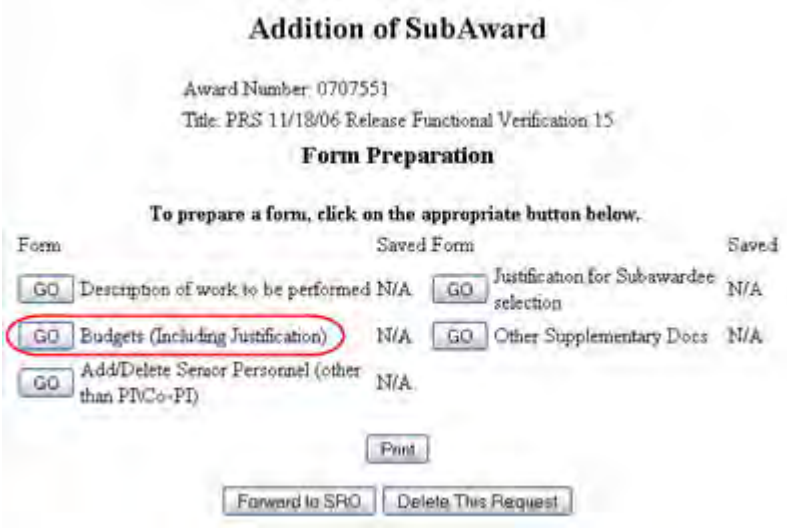


Figure 1 Subawarding, Transferring or Contracting Out a Part of an NSF Award Form Preparation screen. The Go button for Budgets (Including Justification) is circled.

2. On the **Subawarding, Transferring or Contracting Out a Part of an NSF Award Request Preparation** screen (Figure 1), click the **Go** button for Budgets (Including Justification). The **Project Budget** screen displays (Figure 2).

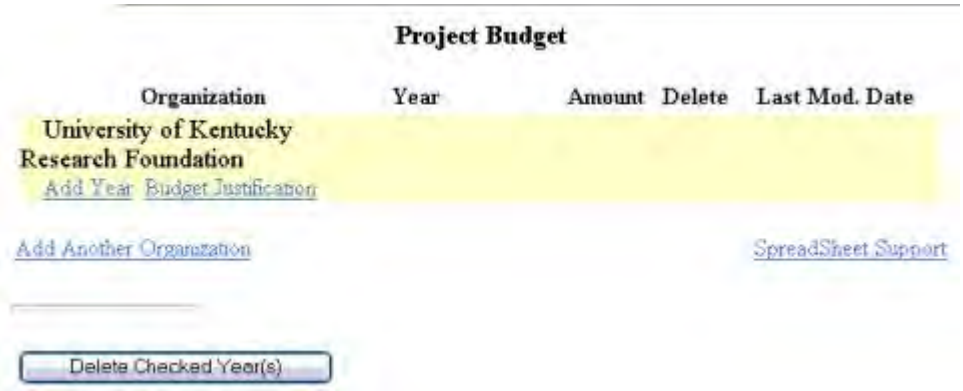


Figure 2 Project Budget screen.

See Budgets (Including Justification) and Create a Budget, Step 2 for instructions on how complete a budget for the recipient organization. NOTE: When adding a subaward to an award, the Budget Justification must be added as a separate PDF file.

Add/Delete Senior Personnel for Subawarding, Transferring or Contracting Out a Part of an NSF Award

1. Access the **Subawarding, Transferring or Contracting Out a Part of an NSF Award Form Preparation** screen (Figure 1) (see Prepare an Subawarding, Transferring or Contracting Out a Part of an NSF Award Request).

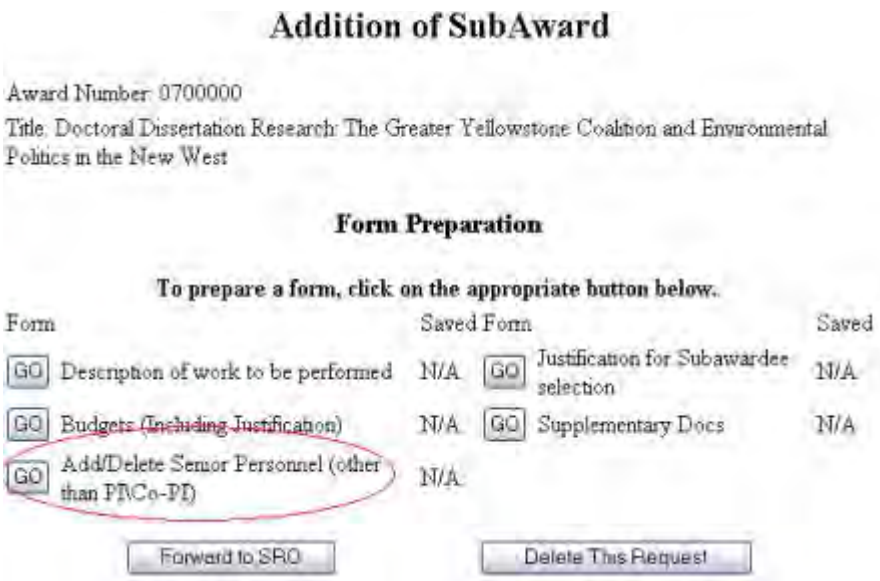


Figure 1 Subawarding, Transferring or Contracting Out a Part of an NSF Award Form Preparation screen. The Go button for Add/Delete Senior Personnel is circled.

2. On the **Subawarding, Transferring or Contracting Out a Part of an NSF Award Form Preparation** screen (Figure 1), click the **Go** button for Add/Delete Senior Personnel. The **Add/Delete Non-Co-Principal Investigator (Co-PI) Senior Personnel Assigned to Proposal** screen displays (Figure 2).

Figure 2 Add/Delete Non-Co-Principal Investigator (Co-PI) Senior Personnel Assigned to Proposal screen.

3. See Add/Delete Senior Personnel for instructions on adding or deleting Non-Co-PI Senior Personnel.

Justification for Subawardee Selection for Subawarding, Transferring or Contracting Out a Part of an NSF Award

1. Prepare a word-processing document with the justification. See Acceptable Formats for FastLane for the many formats FastLane accepts for uploading.
2. Access the **Subawarding, Transferring or Contracting Out a Part of an NSF Award Form Preparation** screen (Figure 1) (see Prepare an Subawarding, Transferring or Contracting Out a Part of an NSF Award Request).

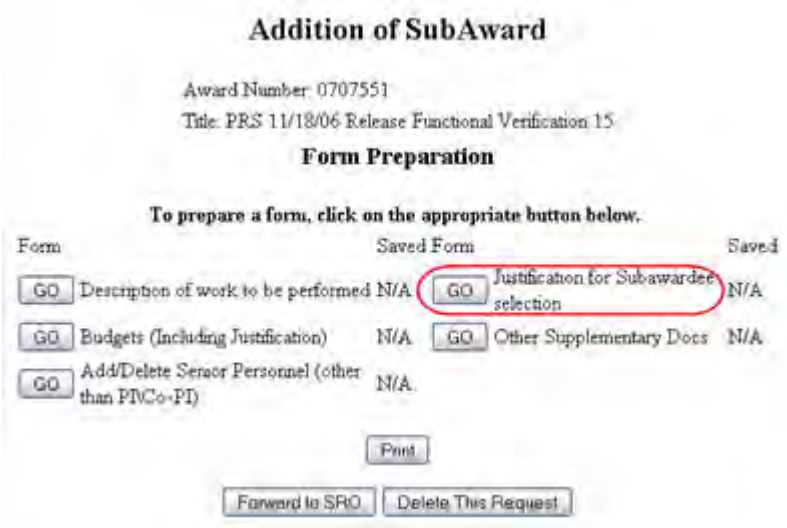


Figure 1 Subawarding, Transferring or Contracting Out a Part of an NSF Award Form Preparation screen. The Go button for Justification for Subrecipient Selection is circled.

3. On the **Subawarding, Transferring or Contracting Out a Part of an NSF Award Form Preparation** screen (Figure 1), click the **Go** button for Justification for Subrecipient Selection. The **Justification for Subrecipient Selection File Upload** screen displays (Figure 2).

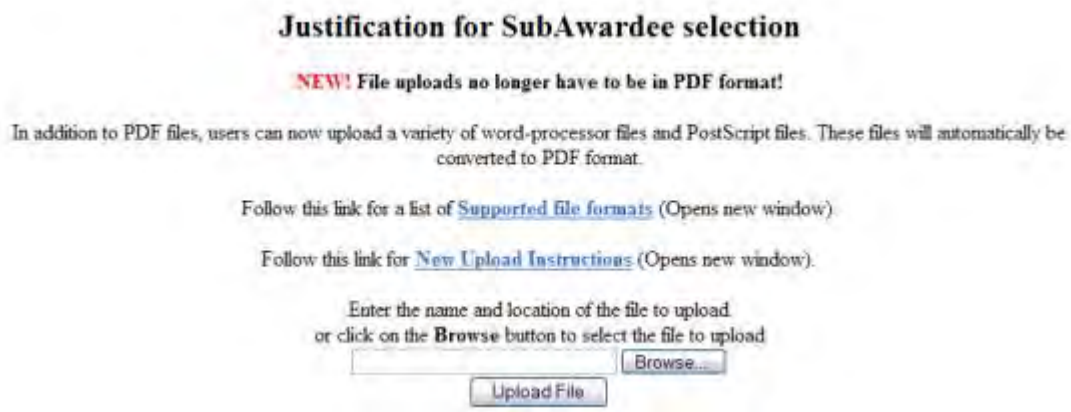


Figure 2 Justification for Subrecipient Selection File Upload screen.

4. Follow the directions in Upload a File to upload the Justification. When you have accepted the upload, the **Justification for Subrecipient Selection File Upload** screen (Figure 3) displays with these options:

- Display Current Justification for Subrecipient Selection
- Delete Current Justification for Subrecipient Selection
- Upload a New Justification for Subrecipient Selection

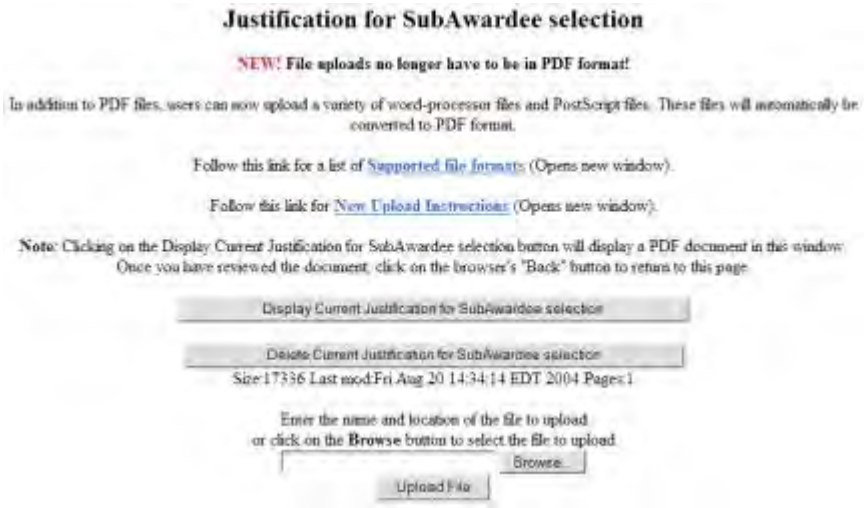


Figure 3 Justification for Subrecipient Selection File Upload screen with options viewing or deleting the justification.

Display Current Justification for Subrecipient Selection

Click the **Display Current Justification for Subrecipient Selection** button (Figure 3). The file displays in PDF format. If you need to download Adobe Reader, see Adobe Reader for FastLane.

Delete Current Justification for Subrecipient Selection

1. Click the **Delete Current Justification for Subrecipient Selection** button (Figure 3). A screen displays asking you to confirm that you want to delete the file.
2. Click the **OK** button.

Upload a New Justification for Subrecipient Selection

See Upload a File for instructions on uploading a file. Uploading a new Justification for Subrecipient Selection automatically replaces the file that was previously uploaded.

Supplementary Documents for Subawarding, Transferring or Contracting Out a Part of an NSF Award

1. Access the **Subawarding, Transferring or Contracting Out a Part of an NSF Award Form Preparation** screen (Figure 1) (see Prepare an Subawarding, Transferring or Contracting Out a Part of an NSF Award Request).

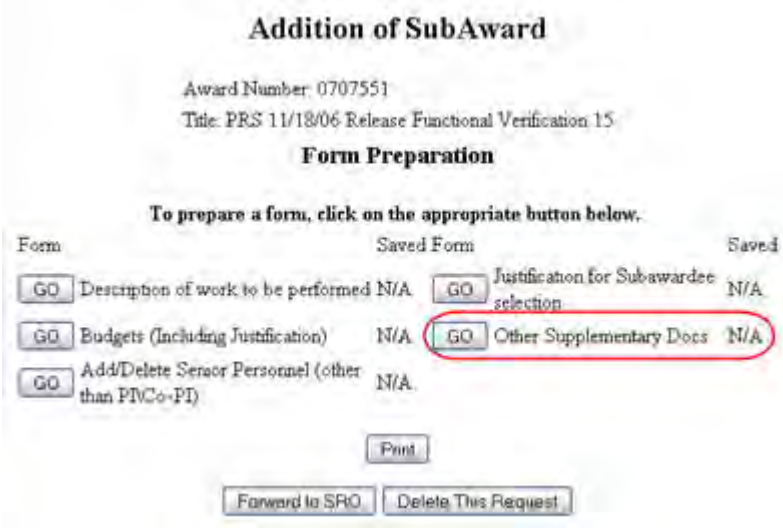


Figure 1 Subawarding, Transferring or Contracting Out a Part of an NSF Award Form Preparation screen. The Go button for Other Supplementary Docs is circled.

2. On the **Subawarding, Transferring or Contracting Out a Part of an NSF Award form Preparation** screen (Figure 1), click the **Go** button for Other Supplementary Documents. The **Supplementary Documents File Upload** screen displays (Figure 2). See Upload a File for directions.

Figure 2 Supplementary Documents File Upload screen.

If a Supplementary Document has already been uploaded, when you click the **Go** button for Supplementary Document on the **Form Preparation** screen, the **Supplementary Document File Upload** screen displays as in Figure 3.

Figure 3 Supplementary Document File Upload screen after a file has been uploaded.

This screen gives you these options:

- Display Current Supplementary Docs
- Delete Current Supplementary Docs
- Upload a Supplementary Document

Note: Uploading a new Supplementary Document will not result in deleting a previously uploaded file.

Display Current Supplementary Docs

1. On the **Supplementary Document File Upload** screen (Figure 3), highlight the Supplementary Document you want to view in the list.
2. Click the **Display Current Supplementary Docs** button (Figure 3). The file displays in PDF format. If you need to download Adobe Reader, see Adobe Reader for FastLane.

Delete Current Supplementary Docs

1. On the **Supplementary Document File Upload** screen (Figure 3), highlight the Supplementary Document you want to delete in the list.
2. Click the **Delete Current Supplementary Docs** button (Figure 3). A screen displays asking you to confirm that you want to delete the file.
3. Click the **OK** button. The **Form Preparation** screen displays.

Upload a Supplementary Document

Follow the directions in Upload a File. Uploading a new file will not replace any previously uploaded files.

What Is the NSF-Approved No-Cost Extension Request?

Consistent with the Award and Administration Guide (AAG) Chapter I.D.3.c(ii), if you require additional time for a project beyond the extension provided by the Grantee-Approved No-Cost Extension and *if exceptional circumstances warrant,* you must submit an NSF-Approved No-Cost Extension Request.

You must submit the NSF-Approved No-Cost Extension Request to NSF at least 45 days before the grant's expiration date.

The request *must* contain:

- The revised expiration date
- The funds remaining for the grant
- The justification for the extension
- A plan for using the unobligated funds

NSF issues the extension in the form of an amendment to the grant.

Prepare an NSF-Approved No-Cost Extension Request

1. Access the **Prepare a New Notification or Request** screen (Figure 1) (see Prepare a New Notification or Request as a PI or Prepare a New Notification or Request as an SPO).

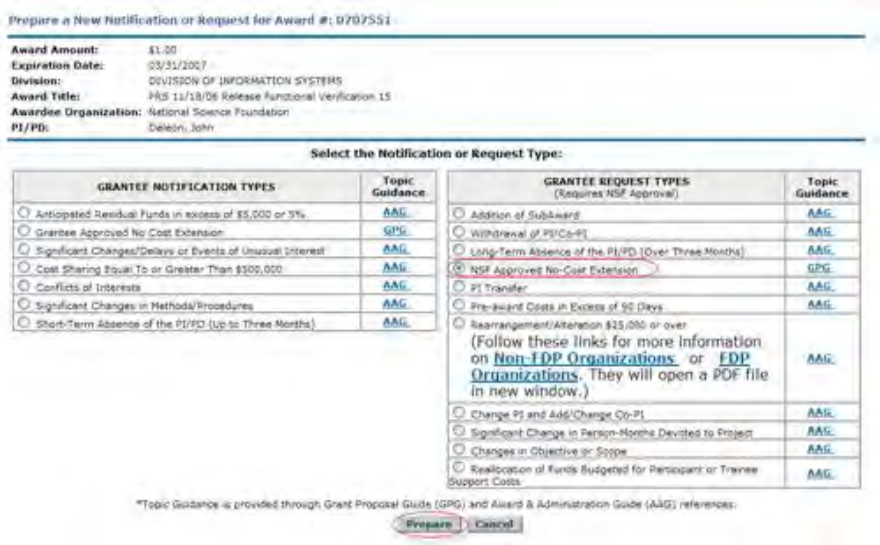


Figure 1 Prepare a New Notification or Request screen. The radio button for NSF-Approved No-Cost Extension and the Prepare button are circled.

2. On the **Prepare a New Notification or Request** screen (Figure 1), click the radio button for NSF-Approved No-Cost Extension.
3. Click the **Prepare** button (Figure 1). The **Modify Request for NSF-Approved No-Cost Extension** screen displays (Figure 2).
4. If no Grantee Approved No-Cost Extension (GANCE) has been submitted and you are eligible to submit a GANCE and all of the requirements to submit a GANCE have been met, then you will be automatically redirected to the GANCE preparation screen. Eligibility requirements for a GANCE can be found in the AAG Chapter I.D.3.
5. If a Grantee Approved No-Cost Extension (GANCE) has been submitted or if all of the requirements to submit a GANCE have not been met, then the **Modify Request for NSF-Approved No-Cost Extension** screen displays (Figure 2).

Figure 2 Modify Request for NSF-Approved No-Cost Extension screen. The Save button is circled.

6. In the **Revised End Date** box (Figure 2), type the newly projected expiration date for the grant (in mm/yyyy format).
7. In the **Remaining Funds** box (Figure 2), type the amount of funds remaining in the grant (no dollar sign, no commas).
8. In the **Justification** box (Figure 2), type or copy and paste the justification for the extension of the grant.
9. In the **Plan for Use of Unobligated Funds** box (Figure 2), type or copy and paste your organization's plan for expending the funds for the project up to the revised expiration date.
10. In the **Explanation for Late Request** box (Figure 2) type or copy and paste your explanation. Click the **Save** button (Figure 2). The **View Request for NSF-Approved No-Cost Extension** screen displays (Figure 3). You have these options:
    - Modify the request
    - Forward the request to the SPO or Submit the request to NSF
    - Delete the request

    (Click on a link above for instructions for that option.)

Figure 3 View Request for NSF-Approved No-Cost Extension screen.

PI/PD or co-PI/co-PD Transfer Request

What Is the PI Transfer Request?

Consistent with the *Proposal & Award Policies & Procedures Guide (PAPPG)* ChapterVII.B.2.f, if a PI plans to leave an organization during the course of a grant, you must submit toNSF a PI Transfer Request.

NSF permits the PI to transfer the grant to a new organization, if both the new and the original research organization agree and the new organization meets the eligibility requirements of the grant. Questions about the eligibility requirements can be directed to the cognizant Program Officer or the Grants Official. Therefore, the successful submission of a PI Transfer Request involves both the new and the original organizations.

The PI and/or the SPO of the original organization prepares the request, but the AOR of the original organization does not submit the PI Transfer Request directly to NSF. Instead:

- The AOR of the original organization indicates agreement with the transfer by forwarding the PI Transfer Request to the SPO of the new organization.
- The AOR of the new organization then indicates agreement with the PI Transfer Request, by submitting the request to NSF.

The main roles and responsibilities for the PI Transfer Request break down like this:

- The PI may:
  - Prepare a PI Transfer Request
  - Forward the PI Transfer Request to the SPO of the original organization
  - Edit the organization's budget in collaboration with the new SPO
- The SPO/AOR of the original organization may:
  - Prepare a PI Transfer Request
  - Edit a PI Transfer Request
  - Return a PI Transfer Request to the PI
  - Submit a PI Transfer Request to the SPO of the new organization (AOR only)
- The SPO/AOR of the new organization may:
  - Edit the request as needed and edit the budget in collaboration with the PI
  - Return the PI Transfer Request to the SPO of the original organization
  - Submit the request to NSF (AOR only)

Each PI Transfer Request *must* contain the following:

- **Grant Transfer Request**
  A form that includes the total estimated disbursements to date and any anticipated costs yet to be incurred against the original grant
- **Progress Summary**
  A brief description of the progress to date on the project in the original organization
- **Description of Work to be Accomplished**
  A description of the work that will be carried out on the project in the new organization
- **Budget (Including Justification)**
  A budget showing the allocation of the remaining award funds for use in the new organization and a justification of how the funds will be expended

These forms are completed through the PI Transfer Request application.

To begin working on a PI Transfer Request:

- *If you are a PI,* see Prepare a PI Transfer Request as a PI.
- *If you are the original SPO*, see Prepare a PI Transfer Request as an SPO/AOR or Work on a PI Request Forwarded by the PI.
- *If you are the new SPO*, see Work on a PI Transfer Forwarded by the Original AOR.

What Is the PI Transfer Request?

Consistent with the *Proposal & Award Policies & Procedures Guide (PAPPG)* ChapterVII.B.2.f, if a PI plans to leave an organization during the course of a grant, you must submit toNSF a PI Transfer Request.

NSF permits the PI to transfer the grant to a new organization, if both the new and the original research organization agree and the new organization meets the eligibility requirements of the grant. Questions about the eligibility requirements can be directed to the cognizant Program Officer or the Grants Official. Therefore, the successful submission of a PI Transfer Request involves both the new and the original organizations.

The PI and/or the SPO of the original organization prepares the request, but the AOR of the original organization does not submit the PI Transfer Request directly to NSF. Instead:

- The AOR of the original organization indicates agreement with the transfer by forwarding the PI Transfer Request to the SPO of the new organization.
- The AOR of the new organization then indicates agreement with the PI Transfer Request, by submitting the request to NSF.

The main roles and responsibilities for the PI Transfer Request break down like this:

- The PI may:
  - Prepare a PI Transfer Request
  - Forward the PI Transfer Request to the SPO of the original organization
  - Edit the organization's budget in collaboration with the new SPO
- The SPO/AOR of the original organization may:
  - Prepare a PI Transfer Request
  - Edit a PI Transfer Request
  - Return a PI Transfer Request to the PI
  - Submit a PI Transfer Request to the SPO of the new organization (AOR only)
- The SPO/AOR of the new organization may:
  - Edit the request as needed and edit the budget in collaboration with the PI
  - Return the PI Transfer Request to the SPO of the original organization

- Submit the request to NSF (AOR only)

Each PI Transfer Request *must* contain the following:

- **Grant Transfer Request**
  A form that includes the total estimated disbursements to date and any anticipated costs yet to be incurred against the original grant
- **Progress Summary**
  A brief description of the progress to date on the project in the original organization
- **Description of Work to be Accomplished**
  A description of the work that will be carried out on the project in the new organization
- **Budget (Including Justification)**
  A budget showing the allocation of the remaining award funds for use in the new organization and a justification of how the funds will be expended

These forms are completed through the PI Transfer Request application.

To begin working on a PI Transfer Request:

- *If you are a PI,* see Prepare a PI Transfer Request as a PI.
- *If you are the original SPO*, see Prepare a PI Transfer Request as an SPO/AOR or Work on a PI Request Forwarded by the PI.
- *If you are the new SPO*, see Work on a PI Transfer Forwarded by the Original AOR.

PI Functions

Prepare a PI Transfer Request as a PI

1. Access the **Prepare a New Notification or Request** screen (Figure 1) (see Prepare a New Notification or Request as a PI).

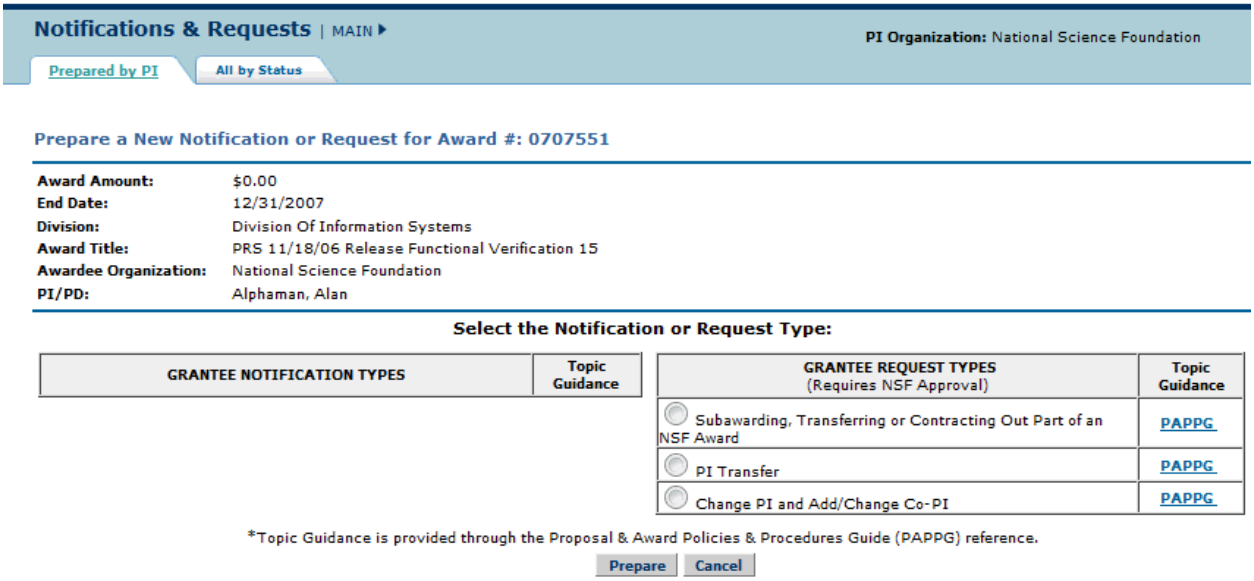
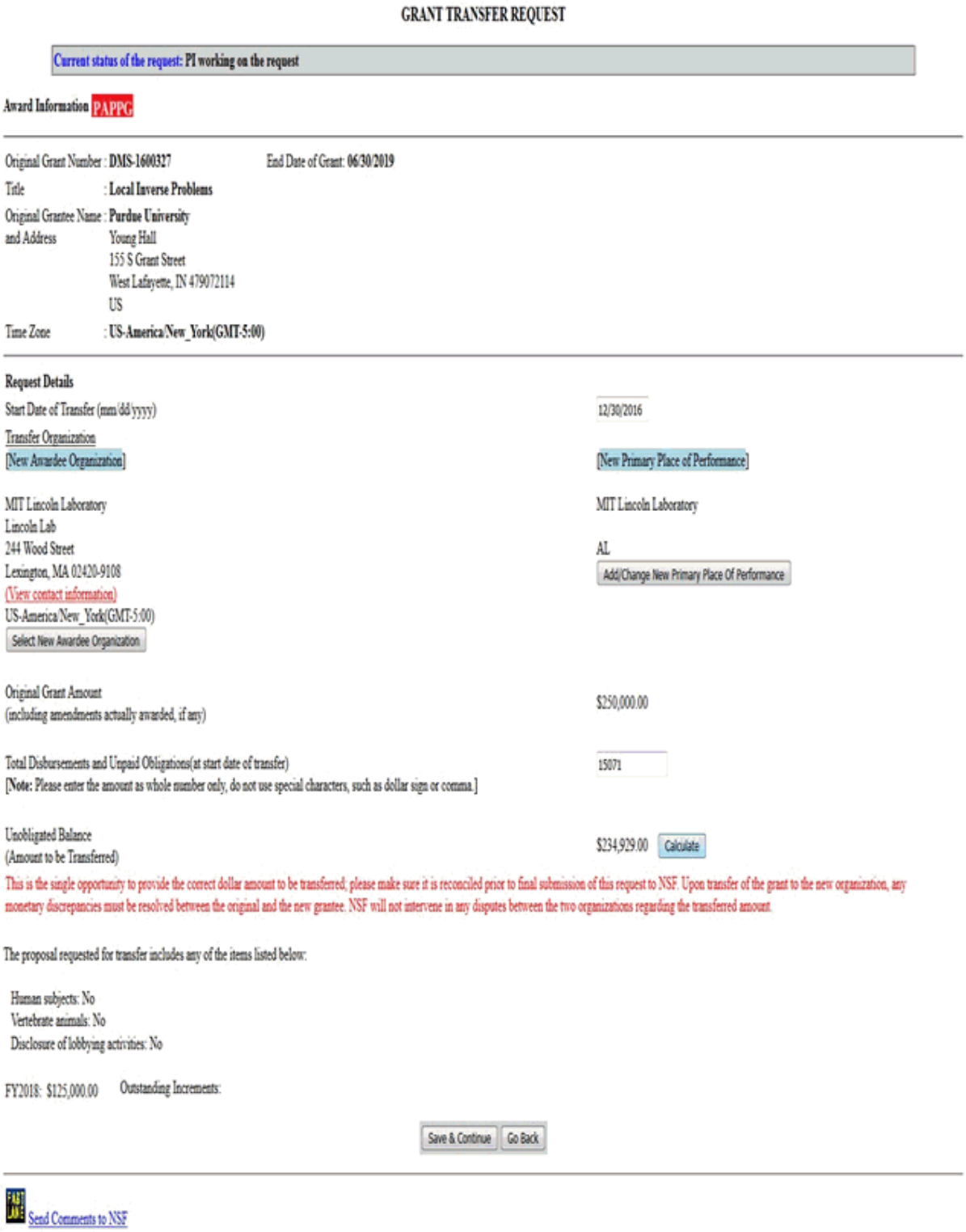


Figure 1 Prepare a New Notification or Request screen.

2. On the **Prepare a New Notification or Request** screen (Figure 1), click the radio button for PI Transfer in the **Grantee Request Types** list.

3. Click the **Prepare** button (Figure 1). The **Grant Transfer Request** screen displays (Figure 2).



GRANT TRANSFER REQUEST

Current status of the request: PI working on the request

Award Information PAPPG

Original Grant Number : DMS-1600327 End Date of Grant: 06/30/2019
Title : Local Inverse Problems
Original Grantee Name and Address : Purdue University
Young Hall
155 S Grant Street
West Lafayette, IN 479072114
US
Time Zone : US-America/New_York(GMT-5:00)

Request Details

Start Date of Transfer (mm/dd/yyyy) 12/30/2016

Transfer Organization
[New Awardee Organization]
MIT Lincoln Laboratory
Lincoln Lab
244 Wood Street
Lexington, MA 02420-9108
(View contact information)
US-America/New_York(GMT-5:00)
Select New Awardee Organization

[New Primary Place of Performance]
MIT Lincoln Laboratory
AL
Add/Change New Primary Place Of Performance

Original Grant Amount
(including amendments actually awarded, if any) $250,000.00

Total Disbursements and Unpaid Obligations(at start date of transfer) 15071
[Note: Please enter the amount as whole number only, do not use special characters, such as dollar sign or comma.]

Unobligated Balance
(Amount to be Transferred) $234,929.00 Calculate

This is the single opportunity to provide the correct dollar amount to be transferred; please make sure it is reconciled prior to final submission of this request to NSF. Upon transfer of the grant to the new organization, any monetary discrepancies must be resolved between the original and the new grantee. NSF will not intervene in any disputes between the two organizations regarding the transferred amount.

The proposal requested for transfer includes any of the items listed below:

Human subjects: No
Vertebrate animals: No
Disclosure of lobbying activities: No

FY2018: $125,000.00 Outstanding Increments:

Save & Continue Go Back

Send Comments to NSF

Figure 2 Grant Transfer Request screen.

4. In the **Request Details** section of the **Grant Transfer Request** screen (Figure 3), click the **Select New Awardee Organization** button to enter the name of the organization that you are transferring the grant to. The **Institution Search** screen displays (Figure 4) for you to search for the name of the new awardee organization in the list of NSF registered organizations.

Figure 3 Request Details section of the Grant Transfer Request screen. The Select New Awardee Organization button is circled.

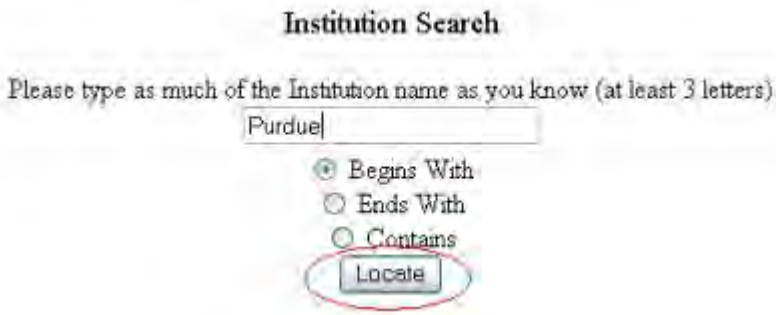


Figure 4 Institution Search screen.

5. Type in the box the string (at least three characters) to search for (Figure 4).
6. Select the search type option (Figure 4):
   - **Begins with** returns all organizations whose name begins with the text entered.
   - **Ends with** returns all organizations whose name ends with the text entered.
   - **Contains** returns all organizations whose name contains the text entered.
7. Click the **Locate** button (Figure 4). The **Institutions Located** screen displays (Figure 5).

Figure 5 Institutions Located screen. The Select button is circled.

8. Highlight the name of the new awardee organizations (Figure 5).
9. Click the **Select** button (Figure 5). The **Grant Transfer Request** screen displays (Figure 6) with the name of the new awardee organization in the **Request Details** section.

GRANT TRANSFER REQUEST

Current status of the request: PI working on the request

Award Information PAPPG

Original Grant Number : DMS-1600327 End Date of Grant: 06/30/2019

Title : Local Inverse Problems

Original Grantee Name : Purdue University

and Address Young Hall
155 S Grant Street
West Lafayette, IN 479072114
US

Time Zone : US-America/New_York(GMT-5:00)

Request Details

Start Date of Transfer (mm/dd/yyyy) 12/30/2016

Transfer Organization

[New Awardee Organization] [New Primary Place of Performance]

MIT Lincoln Laboratory
Lincoln Lab
244 Wood Street
Lexington, MA 02420-9108
(View contact information)
US-America/New_York(GMT-5:00)
Select New Awardee Organization

MIT Lincoln Laboratory
AL
Add/Change New Primary Place Of Performance

Original Grant Amount
(including amendments actually awarded, if any) $250,000.00

Total Disbursements and Unpaid Obligations(at start date of transfer) 15071
[Note: Please enter the amount as whole number only, do not use special characters, such as dollar sign or comma.]

Unobligated Balance
(Amount to be Transferred) $234,929.00 Calculate

This is the single opportunity to provide the correct dollar amount to be transferred; please make sure it is reconciled prior to final submission of this request to NSF. Upon transfer of the grant to the new organization, any monetary discrepancies must be resolved between the original and the new grantee. NSF will not intervene in any disputes between the two organizations regarding the transferred amount.

The proposal requested for transfer includes any of the items listed below:

Human subjects: No
Vertebrate animals: No
Disclosure of lobbying activities: No

FY2018: $125,000.00 Outstanding Increments:

Save & Continue Go Back

Send Comments to NSF

Figure 6 Request Details section of the Grant Transfer Request screen. The View Contact Information link is circled.

10. In the **Request Details** section of the **Grant Transfer Request** screen (Figure 6), click **View Contact Information** to see the contact information for the new awardee organization. The **FastLane Contacts** screen displays (Figure 7) with all the names, email addresses, phone numbers, and fax numbers of the FastLane Contacts for the new awardee organization.

FastLane Contact(s) for: Purdue University

FastLane Contact Name	Email	Phone Number	Fax Number
Megan Spain	ref2@test.com	2223334444	2223335000
ReathaLWalls	ref2@test.com	2223334444	2223335000
LuanneMFlynn	ref2@test.com	2223334444	2223335000
Ann Templeman	ref2@test.com	2223334444	2223335000
MikeRLudwig	ref2@test.com	2223334444	2223335000
Christy Haddock	ref2@test.com	2223334444	2223335000

Figure 7 FastLane Contacts screen.

11. In the **Request Details** section of the **Grant Transfer Request** screen (Figure 8), click the **Add/Change Primary Place Of Performance** button to enter the name of the new Primary Place of Performance. The **Add/Change Primary Place Of Performance** screen (Figure 9) is displayed.

Figure 8 Request Details section of the Grant Transfer Request screen. The Add/Change New Primary Place of Performance button is circled.

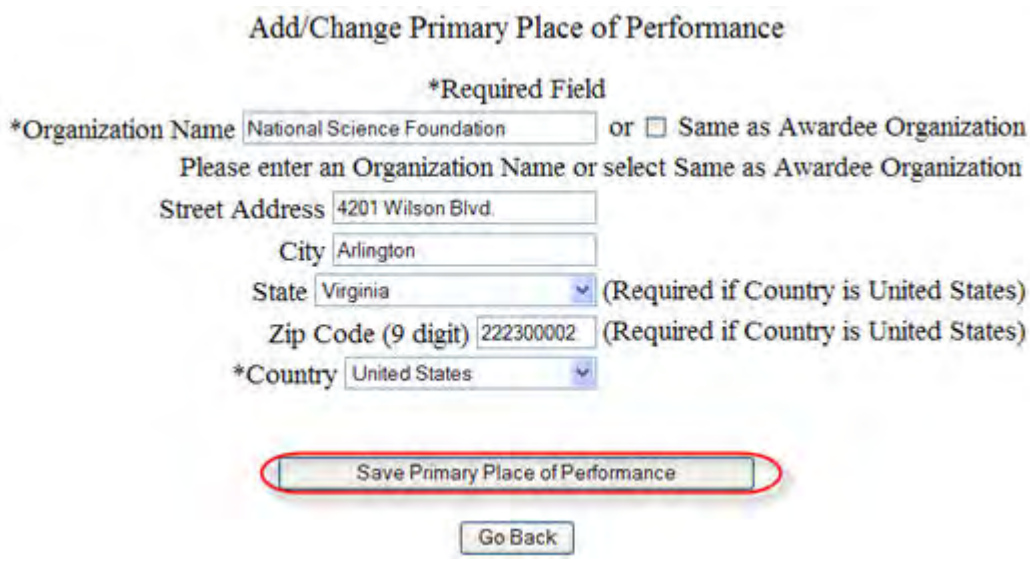


Figure 9 Add/Change Primary Place of Performance screen. The Save Primary Place of Performance button is circled.

12. In the box (Figure 9), type the Organization Name in the box or select Same as Awardee Organization, if this option is applicable (Figure 9).
13. Enter the full address of the Primary Place of Performance:
    - Enter the **Street Address**
    - Enter the **City**
    - Select the **State** from the drop down list if the Country is United States
    - Enter the **Zip Code** (9 digit)
    - Select the **Country** from the drop down list
14. Click the **Save Primary Place of Performance** button (Figure 9). The **Grant Transfer Request** screen displays (Figure 10) with the name of the new primary place of performance in the **Request Details** section.

GRANT TRANSFER REQUEST

Current status of the request: PI working on the request

Award Information PAPPG

Original Grant Number : **DMS-1600327** End Date of Grant: **06/30/2019**

Title : **Local Inverse Problems**

Original Grantee Name and Address : **Purdue University**
Young Hall
155 S Grant Street
West Lafayette, IN 479072114
US

Time Zone : **US-America/New_York(GMT-5:00)**

Request Details

Start Date of Transfer (mm/dd/yyyy) 12/30/2016

Transfer Organization

[New Awardee Organization]

MIT Lincoln Laboratory
Lincoln Lab
244 Wood Street
Lexington, MA 02420-9108
(View contact information)
US-America/New_York(GMT-5:00)
Select New Awardee Organization

[New Primary Place of Performance]

MIT Lincoln Laboratory

AL
Add/Change New Primary Place Of Performance

Original Grant Amount
(including amendments actually awarded, if any) $250,000.00

Total Disbursements and Unpaid Obligations(at start date of transfer) 15071
[**Note:** Please enter the amount as whole number only, do not use special characters, such as dollar sign or comma.]

Unobligated Balance
(Amount to be Transferred) $234,929.00 Calculate

This is the single opportunity to provide the correct dollar amount to be transferred; please make sure it is reconciled prior to final submission of this request to NSF. Upon transfer of the grant to the new organization, any monetary discrepancies must be resolved between the original and the new grantee. NSF will not intervene in any disputes between the two organizations regarding the transferred amount.

The proposal requested for transfer includes any of the items listed below:

Human subjects: No
Vertebrate animals: No
Disclosure of lobbying activities: No

FY2018: $125,000.00 Outstanding Increments:

Save & Continue Go Back

Send Comments to NSF

Figure 10 Request Details section of the Grant Transfer Request screen with the names of the New Awardee Organization and the New Primary Place of Performance displayed.

15. In the **Total Estimated Disbursements and Unpaid Obligations at the Start Date Of Transfer** box on the **Grant Transfer Request** screen (Figure 11), type the total estimate of disbursements and unpaid obligations for the grant (no dollar sign, no commas).

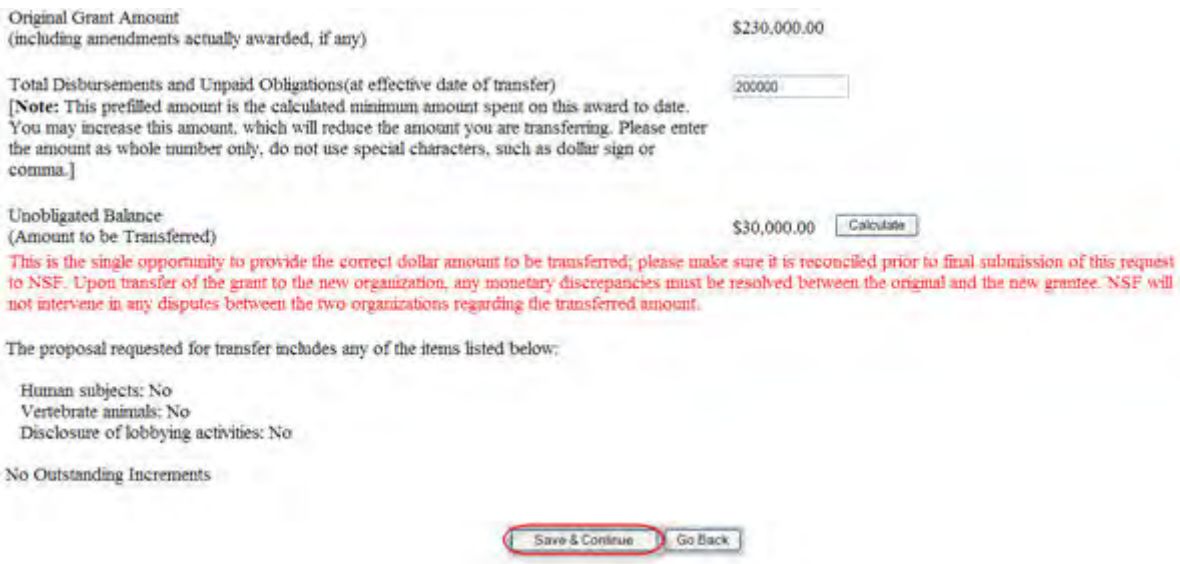


Figure 11 Lower portion of the Grant Transfer Request screen. The Save and Continue button is circled.

16. Click the **Calculate** button (Figure 11). FastLane calculates and displays the amount of the estimated unobligated balance for the award. This is the amount of funds that will be transferred to the new awardee organization.
17. Select any of the following that apply:
    - Human subjects involvement
    - Vertebrate animals involvement
    - Lobbying activities (see "Disclosing Lobbying Activities")
18. Click the **Save and Continue** button (Figure 11). The **Click on a Link to Work** screen displays (Figure 12). On this screen, you have these options:
    - Update contact information
    - Edit transfer request forms
    - Check for completeness
    - Forward the PI Transfer Request to the original SPO
    - Cancel (delete) the PI Transfer Request

Figure 12 Click on a Link to Work screen.

19. Click **Edit Transfer Request Forms** to complete the forms required for a PI Transfer. See Edit Transfer Request Forms Introduction for instructions.

Prepare a PI Transfer Request as a PI

1. Access the **Prepare a New Notification or Request** screen (Figure 1) (see Prepare a New Notification or Request as a PI).

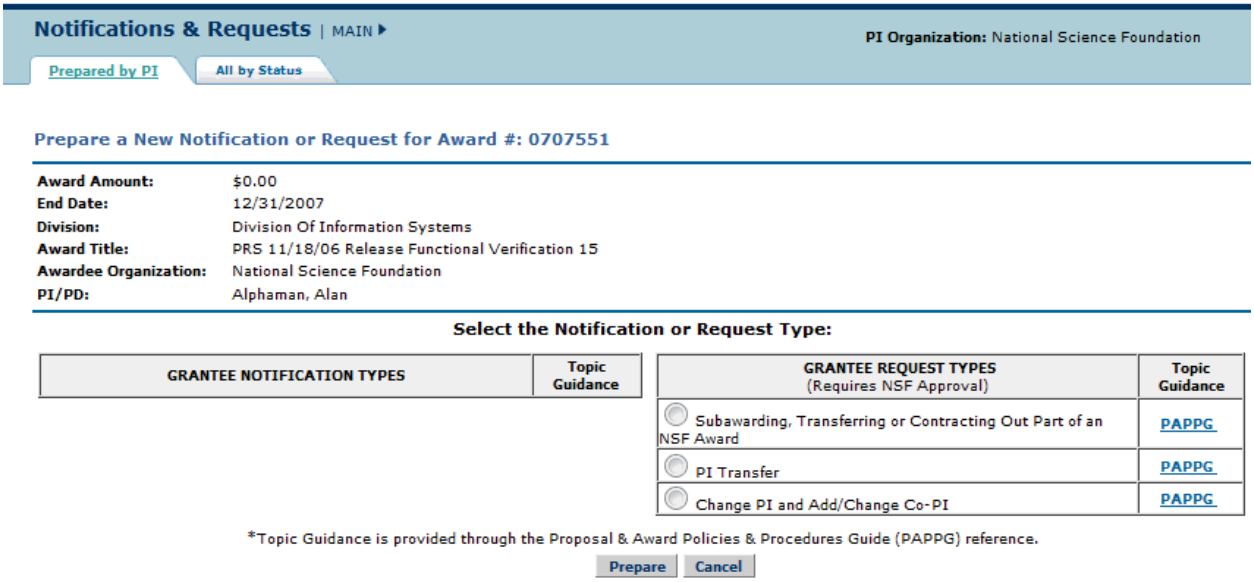
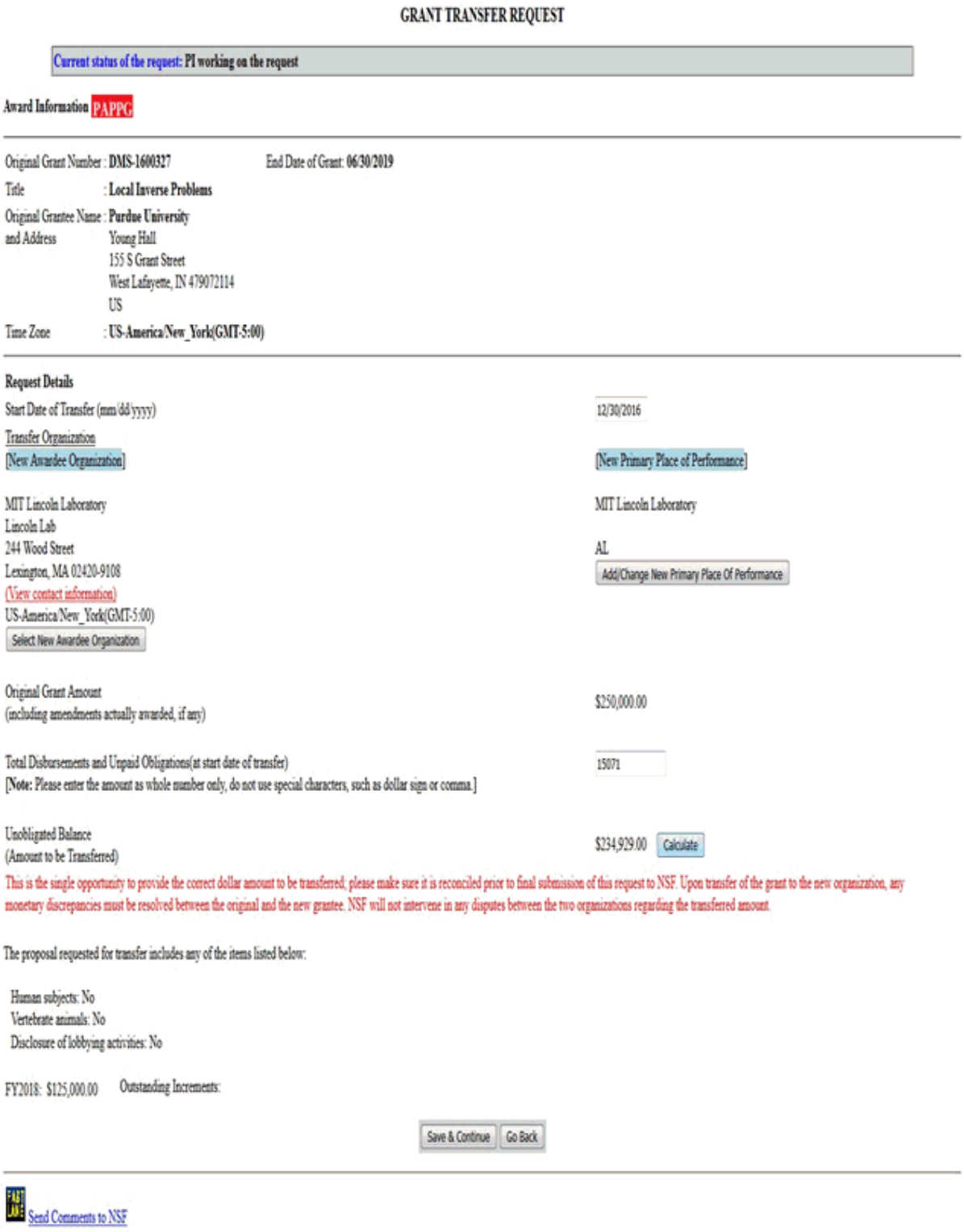


Figure 1 Prepare a New Notification or Request screen.

2. On the **Prepare a New Notification or Request** screen (Figure 1), click the radio button for PI Transfer in the **Grantee Request Types** list.
3. Click the **Prepare** button (Figure 1). The **Grant Transfer Request** screen displays (Figure 2).



GRANT TRANSFER REQUEST

Current status of the request: PI working on the request

Award Information PAPPG

Original Grant Number : DMS-1600327 End Date of Grant: 06/30/2019
Title : Local Inverse Problems
Original Grantee Name : Purdue University
and Address Young Hall
155 S Grant Street
West Lafayette, IN 479072114
US
Time Zone : US-America/New_York(GMT-5:00)

Request Details

Start Date of Transfer (mm/dd/yyyy) 12/30/2016

Transfer Organization

[New Awardee Organization] [New Primary Place of Performance]

MIT Lincoln Laboratory
Lincoln Lab
244 Wood Street
Lexington, MA 02420-9108
(View contact information)
US-America/New_York(GMT-5:00)
Select New Awardee Organization

MIT Lincoln Laboratory
AL
Add/Change New Primary Place Of Performance

Original Grant Amount
(including amendments actually awarded, if any) $250,000.00

Total Disbursements and Unpaid Obligations(at start date of transfer) 15071
[Note: Please enter the amount as whole number only, do not use special characters, such as dollar sign or comma.]

Unobligated Balance
(Amount to be Transferred) $234,929.00 Calculate

This is the single opportunity to provide the correct dollar amount to be transferred; please make sure it is reconciled prior to final submission of this request to NSF. Upon transfer of the grant to the new organization, any monetary discrepancies must be resolved between the original and the new grantee. NSF will not intervene in any disputes between the two organizations regarding the transferred amount.

The proposal requested for transfer includes any of the items listed below:

Human subjects: No
Vertebrate animals: No
Disclosure of lobbying activities: No

FY2018: $125,000.00 Outstanding Increments:

Save & Continue Go Back

Send Comments to NSF

Figure 2 Grant Transfer Request screen.

4. In the **Request Details** section of the **Grant Transfer Request** screen (Figure 3), click the **Select New Awardee Organization** button to enter the name of the organization

that you are transferring the grant to. The **Institution Search** screen displays (Figure 4) for you to search for the name of the new awardee organization in the list of NSF registered organizations.

Figure 3 Request Details section of the Grant Transfer Request screen. The Select New Awardee Organization button is circled.

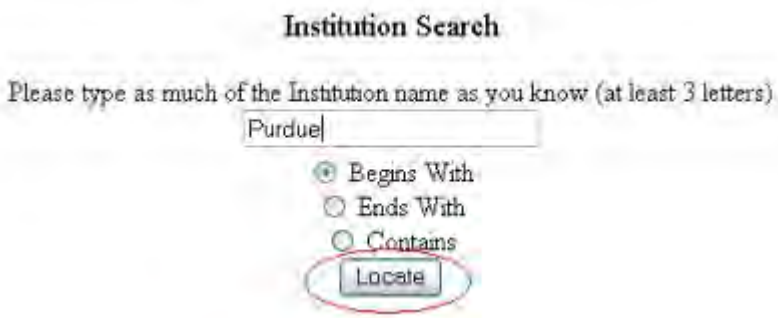


Figure 4 Institution Search screen.

5. Type in the box the string (at least three characters) to search for (Figure 4).
6. Select the search type option (Figure 4):
   - **Begins with** returns all organizations whose name begins with the text entered.
   - **Ends with** returns all organizations whose name ends with the text entered.
   - **Contains** returns all organizations whose name contains the text entered.
7. Click the **Locate** button (Figure 4). The **Institutions Located** screen displays (Figure 5).

Figure 5 Institutions Located screen. The Select button is circled.

8. Highlight the name of the new awardee organizations (Figure 5).

9. Click the **Select** button (Figure 5). The **Grant Transfer Request** screen displays (Figure 6) with the name of the new awardee organization in the **Request Details** section.

GRANT TRANSFER REQUEST

Current status of the request: PI working on the request

Award Information PAPPG

Original Grant Number : DMS-1600327 End Date of Grant: 06/30/2019
Title : Local Inverse Problems
Original Grantee Name : Purdue University
and Address Young Hall
155 S Grant Street
West Lafayette, IN 479072114
US
Time Zone : US-America/New_York(GMT-5:00)

Request Details

Start Date of Transfer (mm/dd/yyyy) 12/30/2016

Transfer Organization
[New Awardee Organization]

MIT Lincoln Laboratory
Lincoln Lab
244 Wood Street
Lexington, MA 02420-9108
(View contact information)
US-America/New_York(GMT-5:00)
Select New Awardee Organization

[New Primary Place of Performance]

MIT Lincoln Laboratory

AL
Add/Change New Primary Place Of Performance

Original Grant Amount
(including amendments actually awarded, if any) $250,000.00

Total Disbursements and Unpaid Obligations(at start date of transfer) 15071
[Note: Please enter the amount as whole number only, do not use special characters, such as dollar sign or comma.]

Unobligated Balance
(Amount to be Transferred) $234,929.00 Calculate

This is the single opportunity to provide the correct dollar amount to be transferred; please make sure it is reconciled prior to final submission of this request to NSF. Upon transfer of the grant to the new organization, any monetary discrepancies must be resolved between the original and the new grantee. NSF will not intervene in any disputes between the two organizations regarding the transferred amount.

The proposal requested for transfer includes any of the items listed below:

Human subjects: No
Vertebrate animals: No
Disclosure of lobbying activities: No

FY2018: $125,000.00 Outstanding Increments:

Save & Continue Go Back

Send Comments to NSF

Figure 6 Request Details section of the Grant Transfer Request screen. The View Contact Information link is circled.

10. In the **Request Details** section of the **Grant Transfer Request** screen (Figure 6), click **View Contact Information** to see the contact information for the new awardee organization. The **FastLane Contacts** screen displays (Figure 7) with all the names, email addresses, phone numbers, and fax numbers of the FastLane Contacts for the new awardee organization.

FastLane Contact(s) for: Purdue University

FastLane Contact Name	Email	Phone Number	Fax Number
Megan Spain	ref2@test.com	2223334444	2223335000
ReathaLWalls	ref2@test.com	2223334444	2223335000
LuanneMFlynn	ref2@test.com	2223334444	2223335000
Ann Templeman	ref2@test.com	2223334444	2223335000
MikeRLudwig	ref2@test.com	2223334444	2223335000
Christy Haddock	ref2@test.com	2223334444	2223335000

Figure 7 FastLane Contacts screen.

11. In the **Request Details** section of the **Grant Transfer Request** screen (Figure 8), click the **Add/Change Primary Place Of Performance** button to enter the name of the new Primary Place of Performance. The **Add/Change Primary Place Of Performance** screen (Figure 9) is displayed.

Request Details
Effective Date of Transfer (mm/dd/yyyy) 03/02/2011
Transfer Organization
[New Awardee Organization]

Purdue University
Purdue University
Young Hall
155 S Grant Street
West Lafayette, IN 47907-2114
(View contact information)
Select New Awardee Organization

[New Primary Place of Performance]

(Nothing selected)

Add/Change New Primary Place Of Performance

Figure 8 Request Details section of the Grant Transfer Request screen. The Add/Change New Primary Place of Performance button is circled.

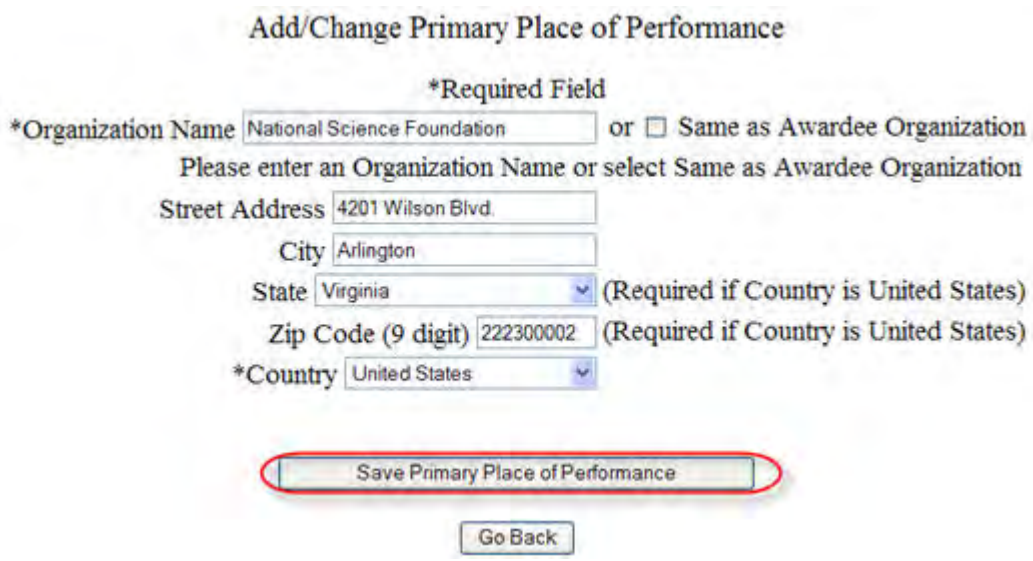


Figure 9 Add/Change Primary Place of Performance screen. The Save Primary Place of Performance button is circled.

12. In the box (Figure 9), type the Organization Name in the box or select Same as Awardee Organization, if this option is applicable (Figure 9).
13. Enter the full address of the Primary Place of Performance:
    - Enter the **Street Address**
    - Enter the **City**
    - Select the **State** from the drop down list if the Country is United States
    - Enter the **Zip Code** (9 digit)
    - Select the **Country** from the drop down list
14. Click the **Save Primary Place of Performance** button (Figure 9). The **Grant Transfer Request** screen displays (Figure 10) with the name of the new primary place of performance in the **Request Details** section.

GRANT TRANSFER REQUEST

Current status of the request: PI working on the request

Award Information PAPPG

Original Grant Number : **DMS-1600327** End Date of Grant: **06/30/2019**

Title : **Local Inverse Problems**

Original Grantee Name : **Purdue University**

and Address Young Hall
155 S Grant Street
West Lafayette, IN 479072114
US

Time Zone : **US-America/New_York(GMT-5:00)**

Request Details

Start Date of Transfer (mm/dd/yyyy) 12/30/2016

Transfer Organization

[New Awardee Organization]

MIT Lincoln Laboratory
Lincoln Lab
244 Wood Street
Lexington, MA 02420-9108
(View contact information)
US-America/New_York(GMT-5:00)
Select New Awardee Organization

[New Primary Place of Performance]

MIT Lincoln Laboratory

AL
Add/Change New Primary Place Of Performance

Original Grant Amount
(including amendments actually awarded, if any) $250,000.00

Total Disbursements and Unpaid Obligations(at start date of transfer) 15071
[**Note:** Please enter the amount as whole number only, do not use special characters, such as dollar sign or comma.]

Unobligated Balance
(Amount to be Transferred) $234,929.00 Calculate

This is the single opportunity to provide the correct dollar amount to be transferred; please make sure it is reconciled prior to final submission of this request to NSF. Upon transfer of the grant to the new organization, any monetary discrepancies must be resolved between the original and the new grantee. NSF will not intervene in any disputes between the two organizations regarding the transferred amount.

The proposal requested for transfer includes any of the items listed below:

Human subjects: No
Vertebrate animals: No
Disclosure of lobbying activities: No

FY2018: $125,000.00 Outstanding Increments:

Save & Continue Go Back

Send Comments to NSF

Figure 10 Request Details section of the Grant Transfer Request screen with the names of the New Awardee Organization and the New Primary Place of Performance displayed.

15. In the **Total Estimated Disbursements and Unpaid Obligations at the Start Date Of Transfer** box on the **Grant Transfer Request** screen (Figure 11), type the total estimate of disbursements and unpaid obligations for the grant (no dollar sign, no commas).

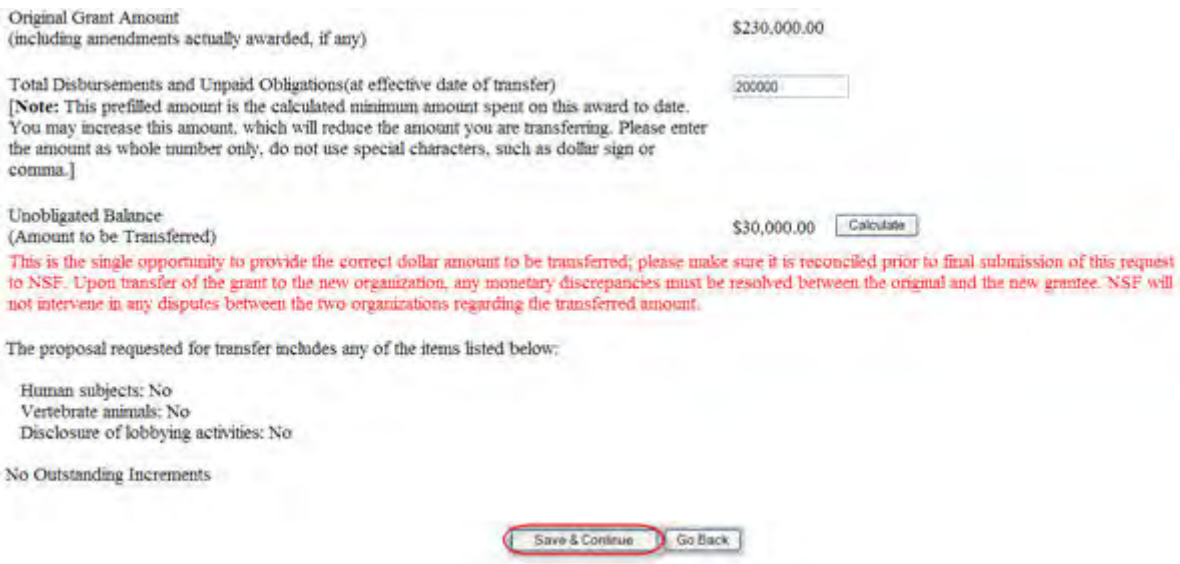


Figure 11 Lower portion of the Grant Transfer Request screen. The Save and Continue button is circled.

16. Click the **Calculate** button (Figure 11). FastLane calculates and displays the amount of the estimated unobligated balance for the award. This is the amount of funds that will be transferred to the new awardee organization.
17. Select any of the following that apply:
    - Human subjects involvement
    - Vertebrate animals involvement
    - Lobbying activities (see "Disclosing Lobbying Activities")
18. Click the **Save and Continue** button (Figure 11). The **Click on a Link to Work** screen displays (Figure 12). On this screen, you have these options:
    - Update contact information
    - Edit transfer request forms
    - Check for completeness
    - Forward the PI Transfer Request to the original SPO
    - Cancel (delete) the PI Transfer Request

Figure 12 Click on a Link to Work screen.

19. Click **Edit Transfer Request Forms** to complete the forms required for a PI Transfer. See Edit Transfer Request Forms Introduction for instructions.

Update Contact Information

1. Access the **Click on a Link to Work** screen (Figure 1) (see Prepare a PI/PD or co-PI/co-PD Transfer Request as a PI).

Figure 1 Click on a Link to Work screen. The Update Contact Information link is circled.

2. On the **Click on a Link to Work** screen (Figure 1), click **Update Contact Information**. The **Principal Investigator (PI) Information** screen displays (Figure 2).

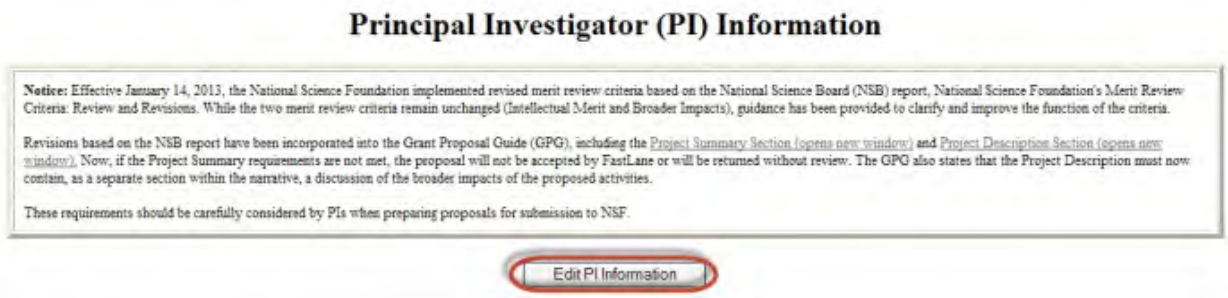


Figure 2 Principal Investigator (PI) Information screen. The Edit PI Information button is circled.

3. Click the **Edit PI Information** button (Figure 2). The **Edit Principal Investigator's (PI) Information** screen displays (Figure 3).

Edit Principal Investigator's (PI) Information

Warning !

- Do not change to another person's name.
- Do not repeat Organization or Department in the "Street" and "Additional" address fields

First Name: Alan Middle Initial: Last Name: Alphaman

Organization: National Science Foundation Institution Identification Number: 4102852000

Change Institution

Department: Division of Information Systems

Street: 4201 Wilson Boulevard 255

Additional:

City: Arlington State: Virginia (Foreign address: Skip it)

Zip: 22230 (Foreign address: Skip it)

Country: United States

Phone: 7036551234 Fax Number: 7036551239

Degree Year: 2001 Degree Type: ScD - Doctor of Science

E-Mail Addr: re0@test.com

Gender: Female Male Do not wish to provide

Disability (select one or more)

Hearing Impairment
Visual Impairment
Mobility Orthopedic Impairment
Other (Enter Description)
None

Ethnicity (choose one)

Ethnicity Definitions
Hispanic or Latino
Not Hispanic or Latino
Do not wish to provide

Race (select one or more)

Race Definitions
American Indian or Alaskan Native
Asian
Black or African American
Native Hawaiian or Other Pacific Islander
White

Citizenship (choose one)

U.S. Citizen
Permanent Resident
Other non-U.S. Citizen
Do not wish to provide

Check here if you are currently serving (or have previously served) as PI, Co-PI or PD on any Federally funded project.

Save Changes Cancel Changes Go Back

Figure 3 Edit Principal Investigator's (PI) Information screen. The Change Institution button is circled.

4. To change your organization, click the **Change Institution** button (Figure 3). The **Institution Search** screen displays (Figure 4).

Figure 4 Institution Search screen.

5. Select the search type option (Figure 4):
   - **Begins with** returns all organizations whose name begins with the text entered.
   - **Ends with** returns all organizations whose name ends with the text entered.
   - **Contains** returns all organizations whose name contains the text entered.
6. Enter the string (at least three characters) to search for (Figure 4).
7. Click the **Locate** button (Figure 4). The **Institution Search** screen displays (Figure 5).

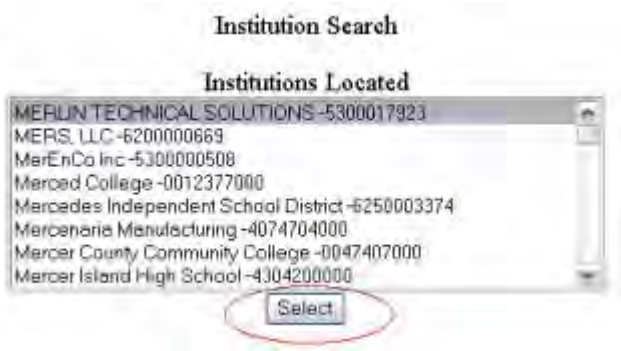


Figure 5 Institution Search screen. The Select button is circled.

8. Highlight the organization in the **Institutions Located** list (Figure 5).
9. Click the **Select** button (Figure 5). The **Edit Principal Investigator's (PI) Information** screen displays (Figure 3) with the name of the selected organization and the Institution Identification Number displaying in the appropriate boxes.
10. On the **Edit Principal Investigator's (PI) Information** screen (Figure 6), when you are finished changing the PI information, click the **Save Changes** button. A screen displays (Figure 7) with confirmation that the PI Information has been saved.

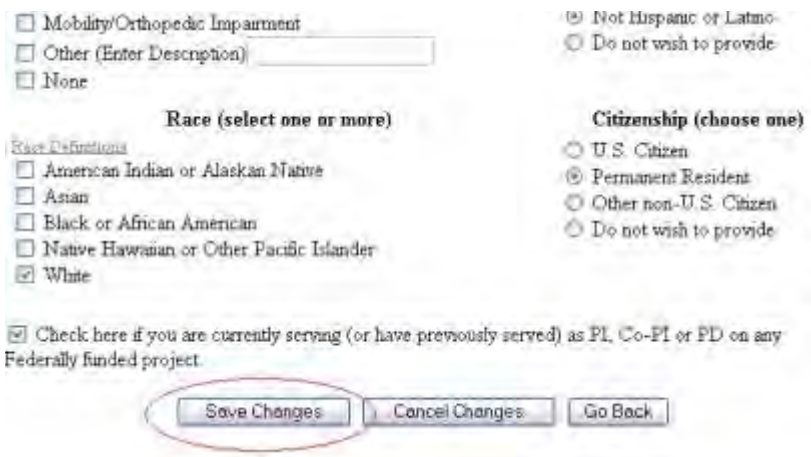


Figure 6 Lower portion of the Edit Principal Investigator's (PI) Information screen. The Save Changes button is circled.

Figure 7 Screen with the message that the changed PI information has been saved.

11. Click the **OK** button (Figure 7). The **Principal Investigator (PI) Information** screen displays (Figure 8).

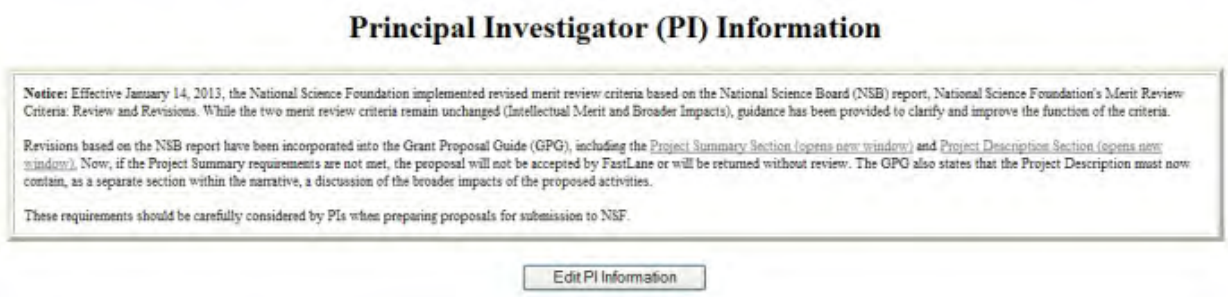


Figure 8 Principal Investigator (PI) Information screen.

Check for Completeness of a PI Transfer Request as a PI

1. Access the **Click on a Link to Work** screen (Figure 1) (see Prepare a PI Transfer Request as a PI).

Figure 1 Click on a Link to Work screen. The Check for Completeness link is circled.

2. On the **Click on a Link to Work** screen (Figure 1), click **Check for Completeness**. The **Completeness Checking of Request for Grant Transfer** screen displays.

If the PI/PD or co-PI/co-PD Transfer Request is incomplete, the **Completeness Checking of Request for Grant Transfer** screen displays as in Figure 2, with a message on which forms still require completion before submission to NSF.

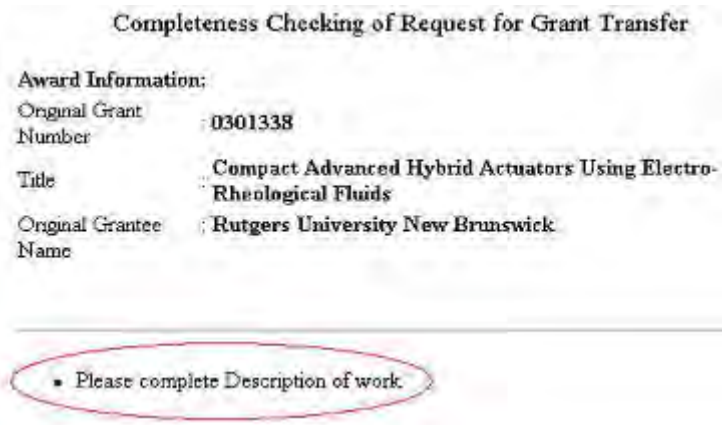
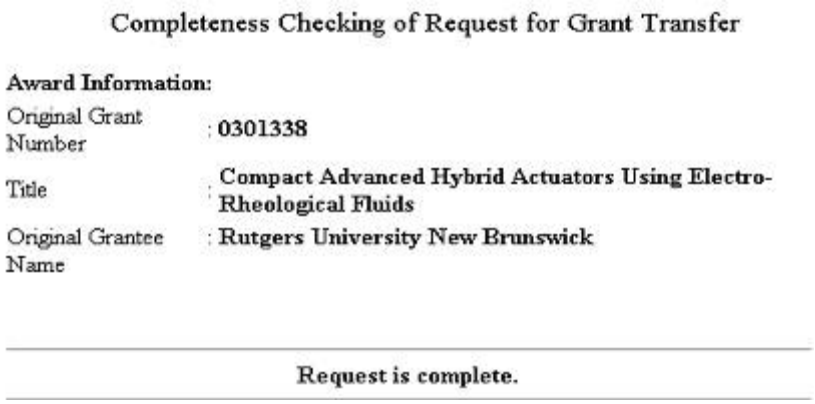


Figure 2 Completeness Checking of Request for Grant Transfer screen. The message on what form is required for submission is circled.

If the PI Transfer Request is complete, the **Completeness Checking of Request for Grant Transfer** screen displays as in Figure 3. The request is ready to be forwarded to the original SPO (see Forward to Original SPO).



Completeness Checking of Request for Grant Transfer

Award Information:

Original Grant Number	: **0301338**
Title	: **Compact Advanced Hybrid Actuators Using Electro-Rheological Fluids**
Original Grantee Name	: **Rutgers University New Brunswick**

Request is complete.

Figure 3 Completeness Checking of Request for Grant Transfer screen with a message that the request is complete.

Forward a PI Transfer Request to Original SPO

Only the PI can forward a PI Transfer Request to the original SPO.

1. Access the **Click on a Link to Work** screen (Figure 1) (see Prepare a PI Transfer Request as a PI).

Figure 1 Click on a Link to Work screen. The Forward Transfer Request to Original SPO link is circled.

2. On the **Click on a Link to Work** screen (Figure 1), click the **Forward Transfer Request to Original SPO** button. The **Forward the Grant Transfer Request** screen displays (Figure 2) with a message for you to confirm that you want to forward the PI Transfer Request to the original SPO.

Figure 2 Forward the Grant Transfer Request to Original SPO screen with the message for you to confirm that you want to forward the request to the original SPO. The Forward button is circled.

3. Click the **Forward** button (Figure 2). The **Grant Transfer Request Forwarded to Original SPO** screen displays (Figure 3).

Figure 3 Grant Transfer Request Forwarded to Original SPO screen. The Continue button is circled.

4. Click the **Continue** button (Figure 3). The PI Transfer Request is forwarded to the original SPO, and the **Click on a Link to Work** screen displays (Figure 4) with these options:
   - Update the contact information
   - View the transfer request forms
   - Cancel (or delete) the request

Figure 4 Click on a Link to Work screen after you have forwarded the PI/PD or co-PI/co-PD Transfer Request to the original SPO.

Delete a PI Transfer Request as a PI

1. Access the **Click on a Link to Work** screen (Figure 1) (see Prepare a PI Transfer Request as a PI).

Figure 1 Click on a Link to Work screen. The Cancel Transfer Request link is circled.

2. On the **Click on a Link to Work** screen (Figure 1), click **Cancel Transfer Request**. The **Delete the Grant Transfer Request** screen displays (Figure 2) with a message for you to confirm that you want to delete the PI/PD or co-PI/co-PD Transfer Request.

Figure 2 Delete the Grant Transfer Request screen. The Delete button is circled.

3. Click the **Delete** button (Figure 2). The PI/PD or co-PI/co-PD Transfer Request is deleted.

View PI Transfer Request Forms as a PI

After you have forwarded a PI/PD or co-PI/co-PD Transfer Request to the original SPO, the **Click on a Link to Work** screen displays with the option to view the PI Transfer Request forms.

1. Access the **Click on a Link to Work** screen (Figure 1) (see Prepare a PI Transfer Request as a PI).

Figure 1 Click on a Link to Work screen. The View Transfer Request Forms button is circled.

2. On the **Click on a Link to Work** screen (Figure1), click **View Transfer Request Forms** to view the forms for the PI Transfer Request. The **Print Menu** screen displays (Figure 2) with a listing of the forms in the PI Transfer Request.

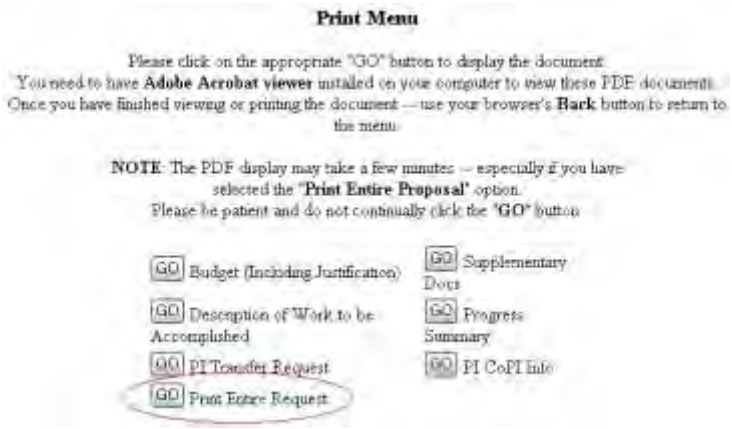


Figure 2 Print Menu screen. The Go button for Print Entire Request is circled.

3. To view a form, click the **Go** button for that form (Figure 2). The form displays in PDF format. If you need to download Adobe Reader, see Adobe Reader for FastLane.
4. To view the entire PI/PD or co-PI/co-PD Transfer Request, click the **Go** button for Print Entire Request (Figure 2). The **NSF Grant Transfer Request** screen displays in PDF format (Figure 3).

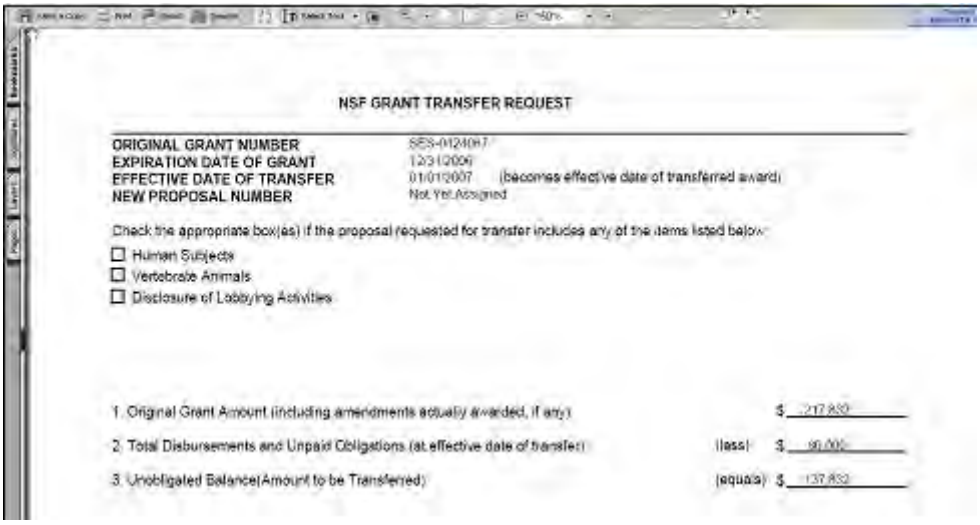


Figure 3 NSF Grant Transfer Request screen. The Printer icon in the upper left corner of the screen is circled.

5. To print the PI Transfer Request, click the **Printer** icon on the top left of the **NSF Grant Transfer Request** screen (Figure 3). The form is printed.
6. Click the browser back button to return to the **Print Menu** screen (Figure 2).

Edit the Budget

Once the SPO of the old awardee organization has sent the PI Transfer Request to the SPO of the new awardee organization, FastLane sends an email to the PI. The PI's **Click on a Link to Work** screen now displays a new option: to edit the budget.

The purpose of this option is to enable the PI and the SPO of the new organization to collaborate on formulating the budget for the project before the AOR submits the PI Transfer Request to the NSF.

1. Access the **Notifications and Requests** screen on the **Prepared by PI** tab (Figure 1) (see Access Notifications and Requests as a PI).

Figure 1 Notifications and Requests screen on the Prepared by PI tab. The Prepare New button is circled.

2. In the **Prepare New** section of the **Notifications and Requests** screen on the **Prepared by PI** tab (Figure 1), select the proposal award number for the project from the **Award #** drop-down list.
3. Click the **Prepare New** button (Figure 1). The **Prepare a New Notification or Request** screen displays (Figure 2).

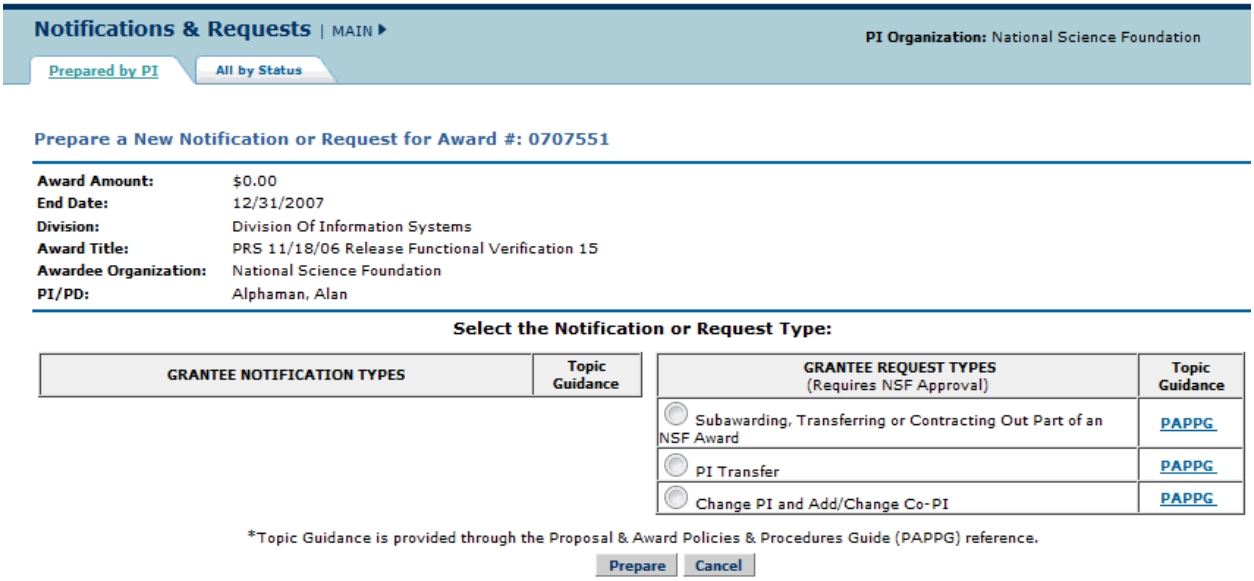


Figure 2 Prepare a New Notification or Request screen. The radio button for PI Transfer and the Prepare button are circled.

4. Click the radio button for PI Transfer (Figure 2).
5. Click the **Prepare** button (Figure 2). The **Grant Transfer Request** screen displays (Figure 3) with the status message at the top of the screen that the PI Transfer Request is now with the SPO of the new awardee organization.

GRANT TRANSFER REQUEST

Current status of the request: PI working on the request

Award Information PAPPG

Original Grant Number : DMS-1600327 End Date of Grant: 06/30/2019

Title : Local Inverse Problems

Original Grantee Name : Purdue University

and Address Young Hall
155 S Grant Street
West Lafayette, IN 479072114
US

Time Zone : US-America/New_York(GMT-5:00)

Request Details

Start Date of Transfer (mm/dd/yyyy) 12/30/2016

Transfer Organization

[New Awardee Organization] [New Primary Place of Performance]

MIT Lincoln Laboratory
Lincoln Lab
244 Wood Street
Lexington, MA 02420-9108
(View contact information)
US-America/New_York(GMT-5:00)
Select New Awardee Organization

MIT Lincoln Laboratory
AL
Add/Change New Primary Place Of Performance

Original Grant Amount
(including amendments actually awarded, if any) $250,000.00

Total Disbursements and Unpaid Obligations(at start date of transfer) 15071
[Note: Please enter the amount as whole number only, do not use special characters, such as dollar sign or comma.]

Unobligated Balance
(Amount to be Transferred) $234,929.00 Calculate

This is the single opportunity to provide the correct dollar amount to be transferred; please make sure it is reconciled prior to final submission of this request to NSF. Upon transfer of the grant to the new organization, any monetary discrepancies must be resolved between the original and the new grantee. NSF will not intervene in any disputes between the two organizations regarding the transferred amount.

The proposal requested for transfer includes any of the items listed below:

Human subjects: No
Vertebrate animals: No
Disclosure of lobbying activities: No

FY2018: $125,000.00 Outstanding Increments:

Save & Continue Go Back

Send Comments to NSF

Figure 3 Grant Transfer Request screen. The status message that the new SPO is working on the request and the Continue button are circled.

6. Click the **Continue** button (Figure 3). The **Click on a Link to Work** screen displays (Figure 4) with the new option to edit the budget.

Figure 4 Click on a Link to Work screen. The Edit Budget link is circled.

7. Click **Edit the Budget** (Figure 4). The **Project Budget** screen displays (Figure 5).

Project Budget

Organization	Year	Amount	Last Mod. Date
Yale University	1 Funds - Personnel	$244,150	Jun-27-2006 16:42:02
Budget Justification	2 Funds - Personnel	$12,600	Jun-27-2006 16:41:37

Figure 5 Project Budget screen.

8. See Budgets (Including Justification) for instructions on how to work on the budget for the new awardee organization. See Enter Budget Data Online for instruction on how to complete the Project Budget form.

Original SPO Functions

Original SPO/AOR Functions

As the original SPO, you have these options for working on a PI Transfer Request:

- Prepare a PI Transfer Request
- Work on a PI Transfer Request forwarded by a PI
- Edit PI Transfer Request forms
- Check for completeness
- Forward a PI Transfer Request to the new SPO (AOR only)
- Return a PI Transfer Request to the PI
- Delete a PI Transfer Request
- View PI Transfer Request forms

Original SPO/AOR Functions

As the original SPO, you have these options for working on a PI Transfer Request:

- Prepare a PI Transfer Request
- Work on a PI Transfer Request forwarded by a PI
- Edit PI Transfer Request forms
- Check for completeness
- Forward a PI Transfer Request to the new SPO (AOR only)

- Return a PI Transfer Request to the PI
- Delete a PI Transfer Request
- View PI Transfer Request forms

Prepare a PI Transfer Request as an SPO

1. Access the **Prepare a New Notification or Request** screen (Figure 1) (see Prepare a New Notification or Request as an SPO/AOR).

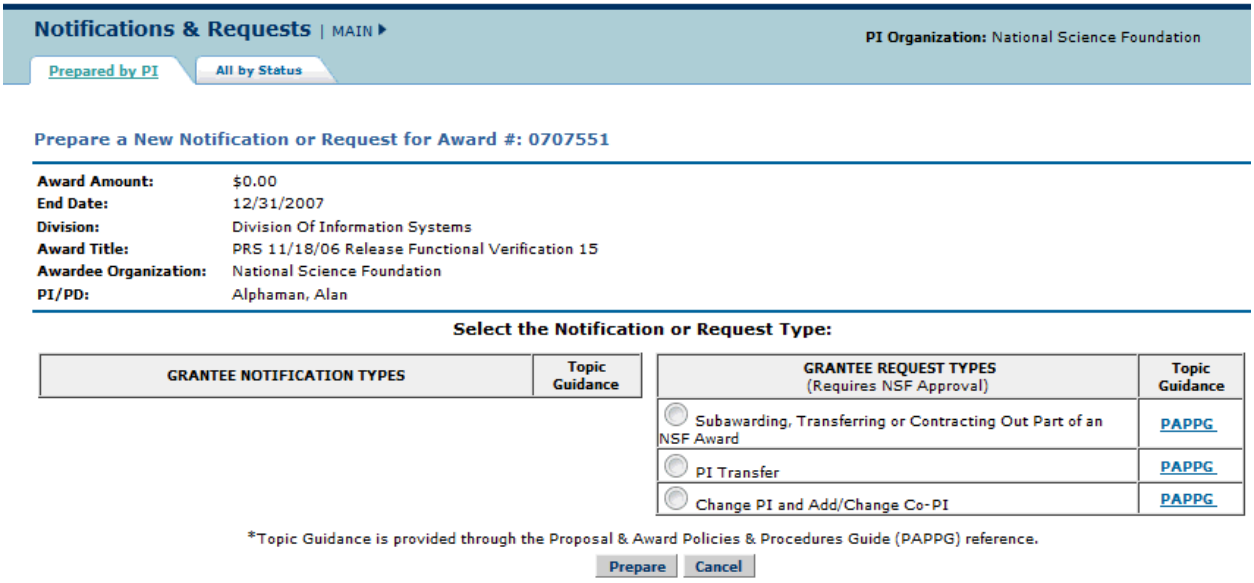
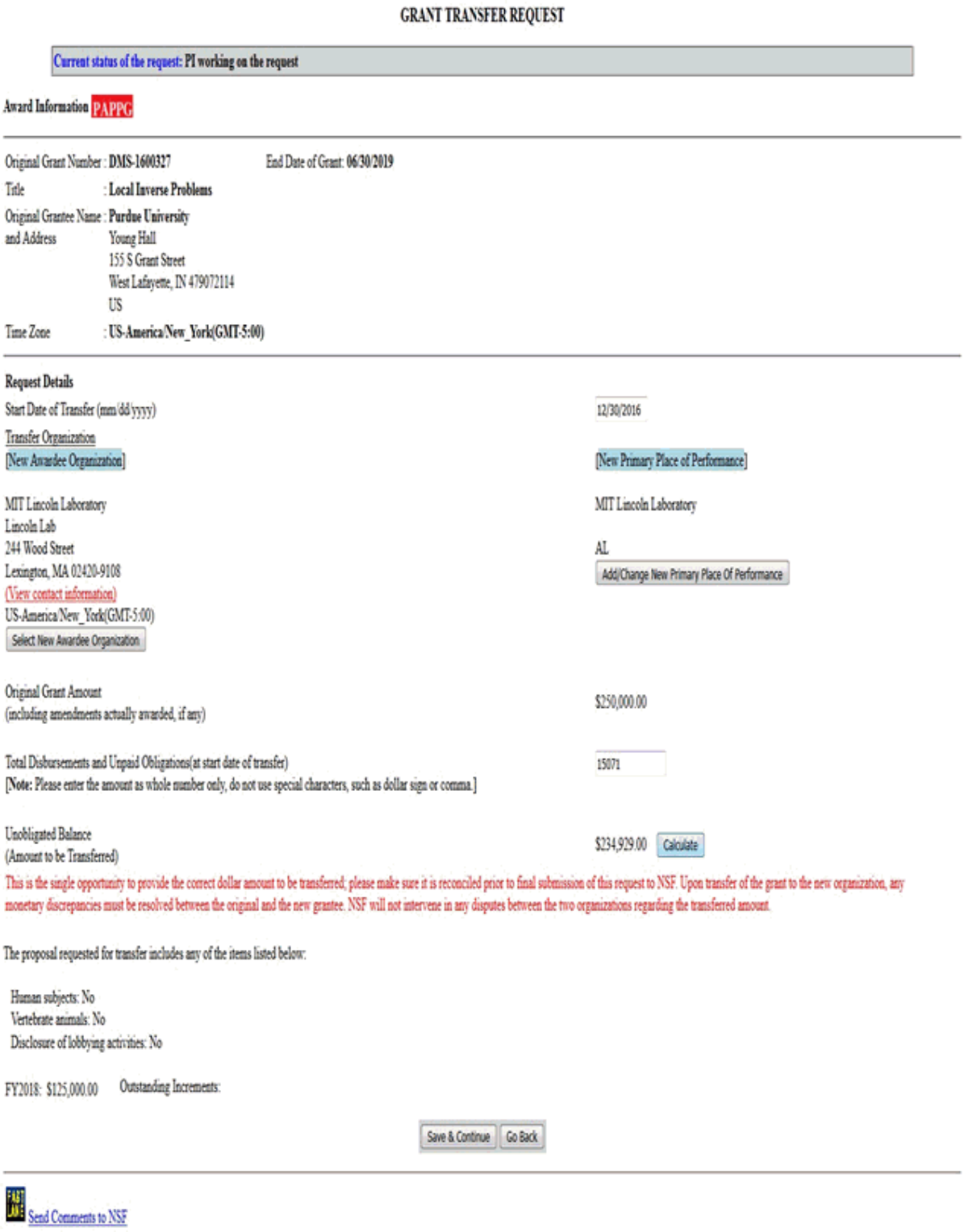


Figure 1 Prepare a New Notification or Request screen.

2. On the **Prepare a New Notification or Request** screen (Figure 1), click the radio button for PI/PD or co-PI/co-PD Transfer in the **Grantee Request Types** list.
3. Click the **Prepare** button (Figure 1). The **Grant Transfer Request** screen displays (Figure 2).



GRANT TRANSFER REQUEST

Current status of the request: PI working on the request

Award Information PAPPG

Original Grant Number : DMS-1600327 End Date of Grant: 06/30/2019
Title : Local Inverse Problems
Original Grantee Name : Purdue University
and Address Young Hall
155 S Grant Street
West Lafayette, IN 479072114
US
Time Zone : US-America/New_York(GMT-5:00)

Request Details

Start Date of Transfer (mm/dd/yyyy) 12/30/2016

Transfer Organization

[New Awardee Organization] [New Primary Place of Performance]

MIT Lincoln Laboratory
Lincoln Lab
244 Wood Street
Lexington, MA 02420-9108
(View contact information)
US-America/New_York(GMT-5:00)
Select New Awardee Organization

MIT Lincoln Laboratory
AL
Add/Change New Primary Place Of Performance

Original Grant Amount
(including amendments actually awarded, if any) $250,000.00

Total Disbursements and Unpaid Obligations(at start date of transfer) 15071
[Note: Please enter the amount as whole number only, do not use special characters, such as dollar sign or comma.]

Unobligated Balance
(Amount to be Transferred) $234,929.00 Calculate

This is the single opportunity to provide the correct dollar amount to be transferred; please make sure it is reconciled prior to final submission of this request to NSF. Upon transfer of the grant to the new organization, any monetary discrepancies must be resolved between the original and the new grantee. NSF will not intervene in any disputes between the two organizations regarding the transferred amount.

The proposal requested for transfer includes any of the items listed below:

Human subjects: No
Vertebrate animals: No
Disclosure of lobbying activities: No

FY2018: $125,000.00 Outstanding Increments:

Save & Continue Go Back

Send Comments to NSF

Figure 2 Grant Transfer Request screen.

4. In the **Request Details** section of the **Grant Transfer Request** screen (Figure 3), click the **Select New Awardee Organization** button to enter the name of the organization

that you are transferring the grant to. The **Institution Search** screen displays (Figure 4) for you to search for the name of the new awardee organization in the list of NSF registered organizations.

Figure 3 Request Details section of the Grant Transfer Request screen. The Select New Awardee Organization button is circled.

Figure 4 Institution Search screen. The Locate button is circled.

5. In the box (Figure 4), type the string (at least three characters) to search for.
6. Select the search type option (Figure 4):
   - **Begins with** returns all organizations whose name begins with the text entered.
   - **Ends with** returns all organizations whose name ends with the text entered.
   - **Contains** returns all organizations whose name contains the text entered.
7. Click the **Locate** button (Figure 4). The **Institutions Located** screen displays (Figure 5).

Figure 5 Institutions Located screen. The Select button is circled.

8. Highlight the name of the new awardee organization (Figure 5).
9. Click the **Select** button (Figure 5). The **Grant Transfer Request** screen displays (Figure 6) with the name of the new awardee organization in the **Request Details** section.

Figure 6 Request Details section of the Grant Transfer Request screen. The View Contact Information link is circled.

10. In the **Request Details** section of the **Grant Transfer Request** screen (Figure 6), click **View Contact Information** to see the contact information for the new awardee organization. The **FastLane Contacts** screen displays (Figure 7) with all the names, email addresses, phone numbers, and fax numbers of the FastLane Contacts for the new awardee organization.

FastLane Contact(s) for: Purdue University

FastLane Contact Name	Email	Phone Number	Fax Number
Megan Spain	ref2@test.com	2223334444	2223335000
ReathaLWalls	ref2@test.com	2223334444	2223335000
LuanneMFlynn	ref2@test.com	2223334444	2223335000
Ann Templeman	ref2@test.com	2223334444	2223335000
MikeRLudwig	ref2@test.com	2223334444	2223335000
Christy Haddock	ref2@test.com	2223334444	2223335000

Figure 7 FastLane Contacts screen for the new awardee organization.

11. In the **Request Details** section of the **Grant Transfer Request** screen (Figure 8), click the **Add/Change Primary Place Of Performance** button to enter the name of the new Primary Place of Performance. The **Add/Change Primary Place Of Performance** screen displays (Figure 9).

Figure 8 Request Details section of the Grant Transfer Request screen. The Add/Change New Primary Place Of Performance button is circled.

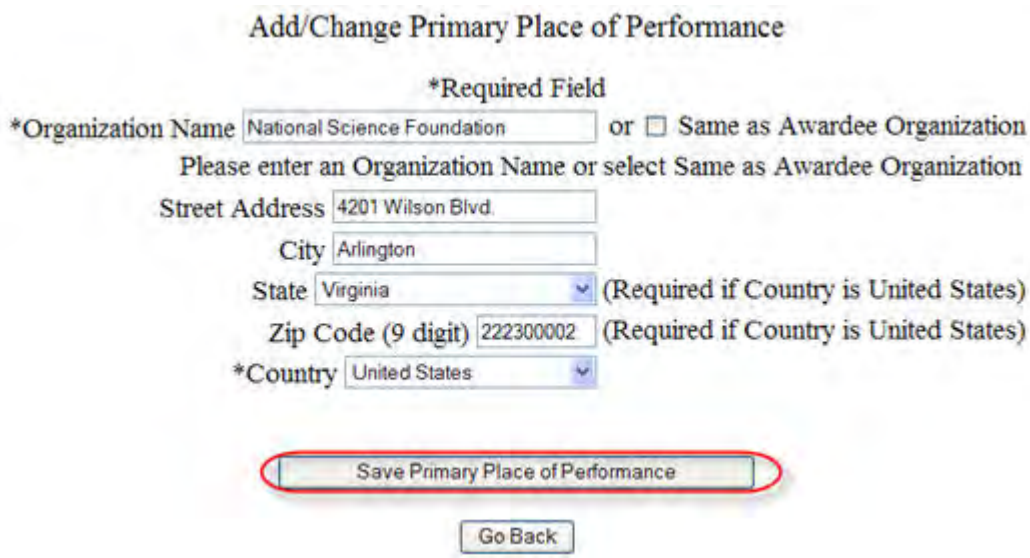


Figure 9 Add/Change Primary Place of Performance screen. The Save Primary Place of Performance button is circled.

12. In the box (Figure 9), type the Organization Name in the box or select Same as Awardee Organization, if this option is applicable (Figure 9).
13. Enter the full address of the Primary Place of Performance:
    - Enter the **Street Address**.
    - Enter the **City**.
    - Select the **State** from the drop down list if the Country is United States.
    - Enter the **Zip Code** (9 digit).
    - Select the **Country** from the drop down list.
14. Click the **Save Primary Place of Performance** button (Figure 9). The **Grant Transfer Request** screen displays (Figure 10) with the name of the new primary place of performance in the **Request Details** section.

Figure 10 Request Details section of the Grant Transfer Request screen with the name of the New Awardee Organization and the New Primary Place of Performance displayed.

15. In the **Total Estimated Disbursements and Unpaid Obligations at the Start Date Of Transfer** box on the **Grant Transfer Request** screen (Figure 11), type the total estimate of disbursements and unpaid obligations for the grant (no dollar sign, no commas).

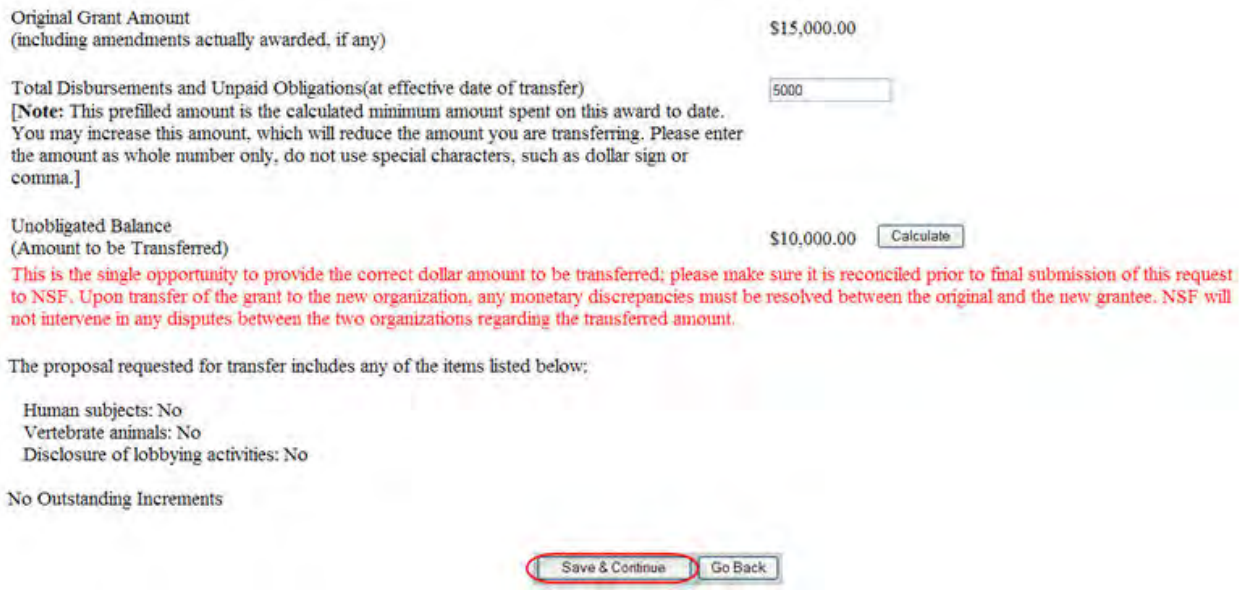


Figure 11 Grant Transfer Request screen. The Total Estimated Disbursements and Unpaid Obligations box, the Calculate button, and the Save and Continue button are circled.

16. Click the **Calculate** button (Figure 11). FastLane calculates and displays the amount of the estimated unobligated balance for the award. This is the amount of funds that will be transferred to the new awardee organization.
17. Select any of the following that apply:
    - Human subjects involvement
    - Vertebrate animals involvement
    - Lobbying activities (see "Disclosing Lobbying Activities")
18. Click the **Save and Continue** button (Figure 11). The **Click on a Link to Work** screen displays (Figure 12). On this screen, you can take the following actions:
    - Edit transfer request forms
    - Check for completeness
    - Forward the PI Transfer Request to the new SPO (AOR only)
    - Return the PI Transfer Request to the PI
    - Cancel (delete) the PI Transfer Request

    (Click on a link above for instructions for that option.)

Figure 12 Click on a Link to Work screen.

19. Click **Edit Transfer Request Forms** to complete the forms required for a PI/PD or co-PI/co-PD Transfer. See Edit Transfer Request Forms Introduction.

Work on a PI Transfer Request Forwarded by a PI

1. Access the **Notifications and Requests** screen on the **Forwarded by PI** tab (Figure 1) (see Access Notifications and Requests as an SPO/AOR).

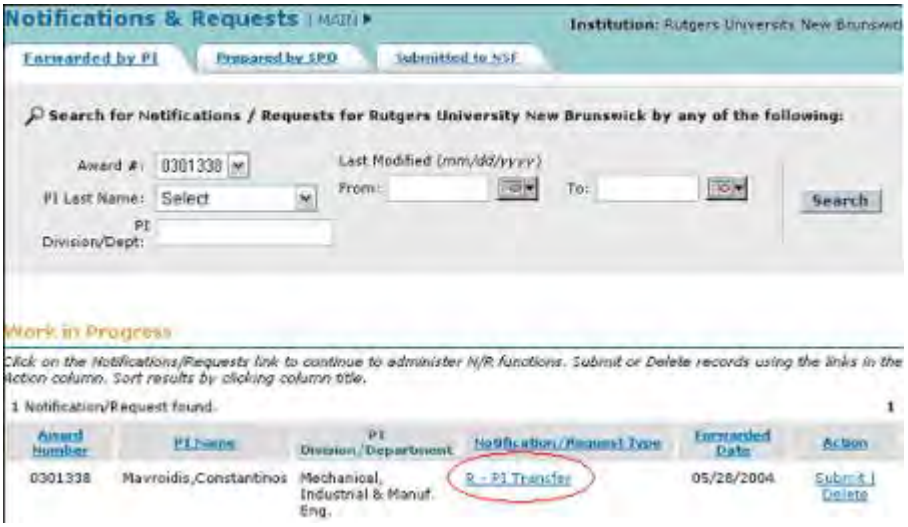


Figure 1 Notifications and Requests screen on the Forwarded by PI tab. The Notification/Request Type link is circled for a PI/PD or co-PI/co-PD Transfer Request.

2. On the **Notifications and Requests** screen on the **Forwarded by PI** tab (Figure 1), find the PI Transfer Request you want to work on (see Search for Notifications and Requests).
3. Click the **Notification/Request Type** link on the row for that request (Figure 1). The **Grant Transfer Request** screen displays (Figure 2).

GRANT TRANSFER REQUEST

Current status of the request: PI working on the request

Award Information PAPPG

Original Grant Number : DMS-1600327 End Date of Grant: 06/30/2019
Title : Local Inverse Problems
Original Grantee Name : Purdue University
and Address Young Hall
155 S Grant Street
West Lafayette, IN 479072114
US
Time Zone : US-America/New_York(GMT-5:00)

Request Details

Start Date of Transfer (mm/dd/yyyy) 12/30/2016

Transfer Organization

[New Awardee Organization]

MIT Lincoln Laboratory
Lincoln Lab
244 Wood Street
Lexington, MA 02420-9108
(View contact information)
US-America/New_York(GMT-5:00)
Select New Awardee Organization

[New Primary Place of Performance]

MIT Lincoln Laboratory

AL
Add/Change New Primary Place Of Performance

Original Grant Amount
(including amendments actually awarded, if any) $250,000.00

Total Disbursements and Unpaid Obligations(at start date of transfer) 15071
[Note: Please enter the amount as whole number only, do not use special characters, such as dollar sign or comma.]

Unobligated Balance
(Amount to be Transferred) $234,929.00 Calculate

This is the single opportunity to provide the correct dollar amount to be transferred; please make sure it is reconciled prior to final submission of this request to NSF. Upon transfer of the grant to the new organization, any monetary discrepancies must be resolved between the original and the new grantee. NSF will not intervene in any disputes between the two organizations regarding the transferred amount.

The proposal requested for transfer includes any of the items listed below:

Human subjects: No
Vertebrate animals: No
Disclosure of lobbying activities: No

FY2018: $125,000.00 Outstanding Increments:

Save & Continue Go Back

Send Comments to NSF

Figure 2 Grant Transfer Request screen. The Save and Continue button is circled.

4. Click the **Save and Continue** button (Figure 2). The **Click on a Link to Work** screen displays (Figure 3). You have these options on the **Click on a Link to Work** screen:
   - Edit transfer request forms
   - Check for completeness
   - Forward transfer request to new SPO
   - Return transfer request to PI
   - Cancel transfer request

   (Click on a link above for instructions for that option.)

Figure 3 Click on a Link to Work screen with the options for work on the PI/PD or co-PI/co-PD Transfer Request.

Edit Transfer Request Forms as Original SPO

1. Access the **Click on a Link to Work** screen (Figure 1) (see Prepare a PI Transfer Request or Work on a PI Transfer Request Forwarded by a PI).

Figure 1 Click on a Link to Work screen. The Edit Transfer Request Forms link is circled.

2. On the **Click on a Link to Work** screen (Figure 1), click **Edit Transfer Request Forms**. The **Form Preparation** screen displays (Figure 2) with the forms for the PI Transfer Request. The forms are:
   - Progress Summary (required)
   - Budgets (Including Justification) (required)

- PI/Co-PI Information
- Description of Work to Be Accomplished (required)
- Supplementary Documents
- Add/Delete Senior Personnel

(Click on a link above for the instructions for that form.)

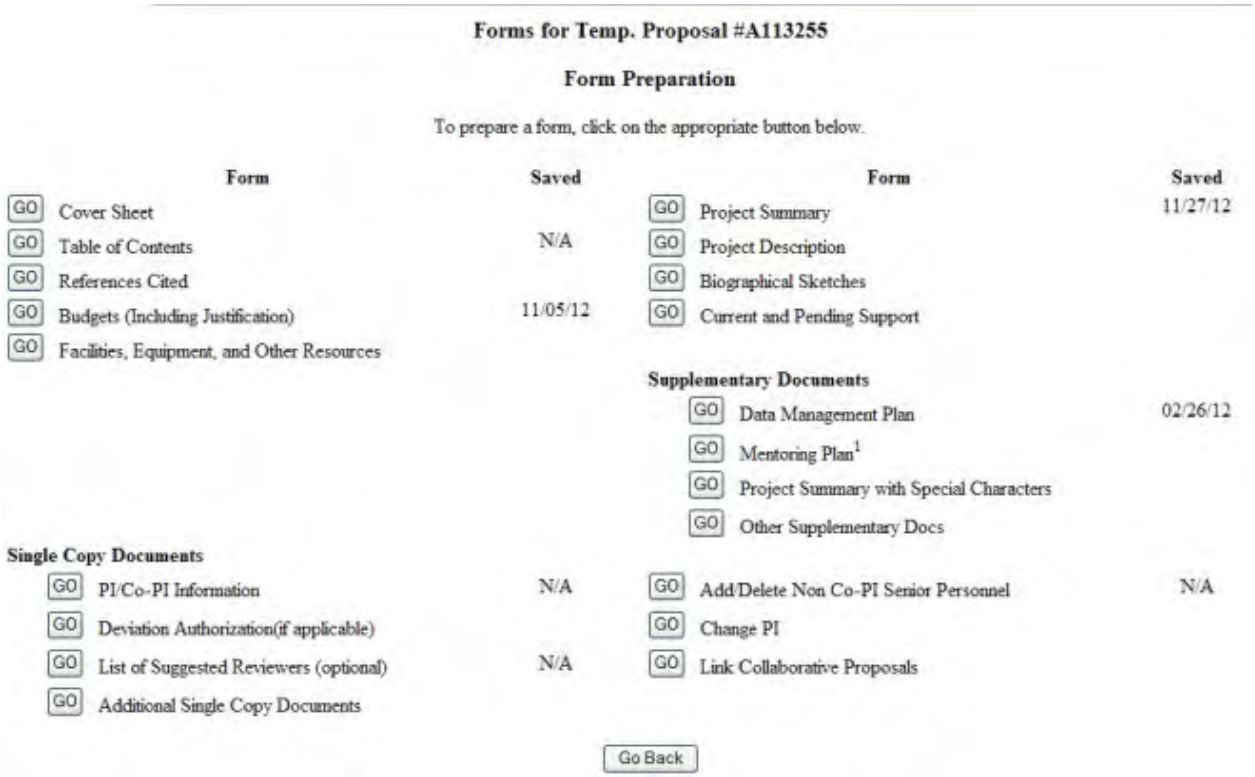


Figure 2 Form Preparation screen.

Check for Completeness as Original SPO

1. Access the **Click on a Link to Work** screen (Figure 1) (see Prepare a PI Transfer Request or Work on a PI Transfer Request Forwarded by a PI).

Figure 1 Click on a Link to Work screen. The Check for Completeness link is circled.

2. On the **Click on a Link to Work** screen (Figure 1), click **Check for Completeness**. The **Completeness Checking of Request for Grant Transfer** screen displays.

If the PI Transfer Request is incomplete, the **Completeness Checking of Request for Grant Transfer** screen displays as in Figure 2 with a message on which forms still require completion for NSF submission.

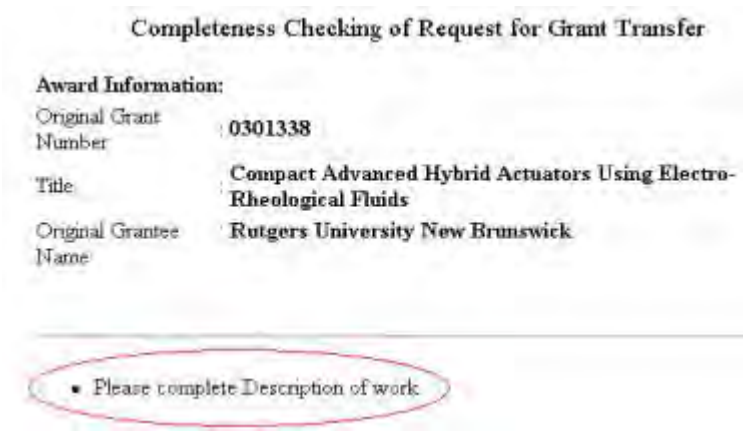


Figure 2 Completeness Checking of Request for Grant Transfer screen. The message of what form still requires completion for submission is circled.

If the PI Transfer Request is complete, the **Completeness Checking of Request for Grant Transfer** screen displays as in Figure 3. The request is ready to be forwarded to the new SPO (see Forward a PI Transfer Request to the New SPO).

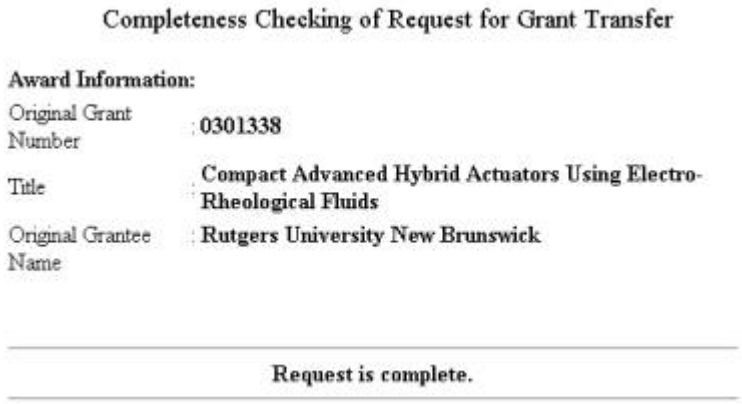


Figure 3 Completeness Checking of Request for Grant Transfer screen with a message that the request is complete.

Forward a PI/PD or co-PI/co-PD Transfer Request to the New SPO

Only the original SPO can forward a PI/PD or co-PI/co-PD Transfer Request to the new SPO.

1. Access the **Click on a Link to Work** screen (Figure 1) (see Prepare a PI/PD or co-PI/co-PD Transfer Request or Work on a PI/PD or co-PI/co-PD Transfer Request Forwarded by a PI).

Figure 1 Click on a Link to Work screen. The Forward Transfer Request to New SPO link is circled.

2. On the **Click on a Link to Work** screen (Figure 1), click **Forward Transfer Request to New SPO**. The **Forward the Grant Transfer Request to New SPO** screen displays (Figure 2) with a message for you to confirm that you want to forward the PI Transfer Request to the new SPO and that thereby your organization agrees with the transfer of the award to the new organization.

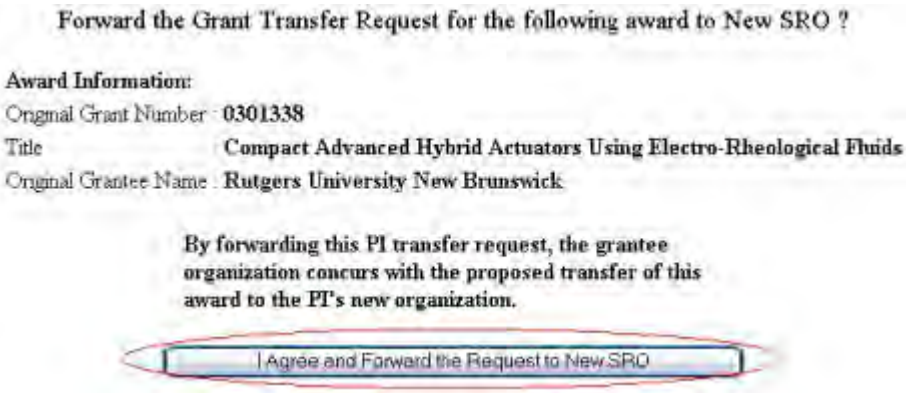


Figure 2 Forward the Grant Transfer Request to New SPO screen. The I Agree and Forward the Request to New SPO button is circled.

3. Click the **I Agree and Forward the Request to New SPO** button (Figure 2). The **Grant Transfer Request Forwarded to New SPO** screen displays (Figure 3) with confirmation that the PI Transfer Request has been forwarded to the new SPO.

Figure 3 Grant Transfer Request Forwarded to New SPO screen. The Continue button is circled.

4. Click the **Continue** button (Figure 3). The **Click on a Link to Work** screen displays (Figure 4) with these options:
   - View transfer request forms
   - Cancel (delete) the transfer request

Figure 4 Click on a Link to Work screen after you have forwarded the PI/PD or co-PI/co-PD Transfer Request to the new SPO.

Return a PI Transfer Request to the PI

1. Access the **Click on a Link to Work** screen (Figure 1) (see Work on a PI Transfer Request Forwarded by a PI).

Figure 1 Click on a Link to Work screen. The Return Transfer Request to PI link is circled.

2. On the **Click on a Link to Work** screen (Figure 1), click **Return Transfer Request to PI**. The **Return the Grant Transfer Request to PI** screen displays (Figure 2) with a message for you to confirm that you want to return the request to the PI.

Figure 2 Return the Grant Transfer Request to PI screen with a message for you to confirm that you want to return the request to the PI. The Return button is circled.

3. Click the **Return** button (Figure 2). The **Grant Transfer Request Returned to PI** screen displays (Figure 3).

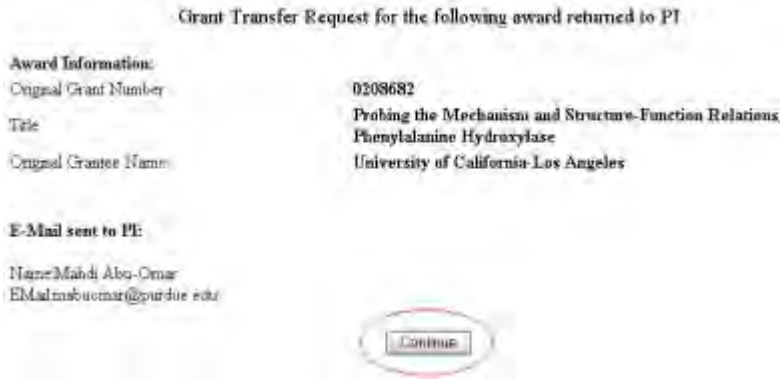


Figure 3 Grant Transfer Request Returned to PI screen. The Continue button is circled.

4. Click the **Continue** button (Figure 3). The **Click on a Link to Work** screen displays (Figure 4) with options to:
   - View transfer request forms
   - Cancel (delete) the transfer request

Figure 4 Click on a Link to Work screen after you have returned the PI Transfer Request to the PI.

Delete a PI Transfer Request as Original SPO

1. Access the **Click on a Link to Work** screen (Figure 1) (see Prepare a PI Transfer Request or Work on a PI Transfer Request Forwarded by a PI).

Figure 1 Click on a Link to Work screen. The Cancel Transfer Request link is circled.

2. On the **Click on a Link to Work** screen (Figure 1), click **Cancel Transfer Request**. The **Delete the Grant Transfer Request** screen displays (Figure 2) with a message for you to confirm that you want to delete the PI Transfer Request.

Figure 2 Delete the Grant Transfer Request screen. The Delete button screen is circled.

3. Click the **Delete** button (Figure 2). The PI Transfer Request is deleted.

View PI Transfer Request Forms as Original SPO

1. Access the **Click on a Link to Work** screen (Figure 1) (see Forward a PI Transfer Request to the New SPO or Return a PI Transfer Request to the PI).

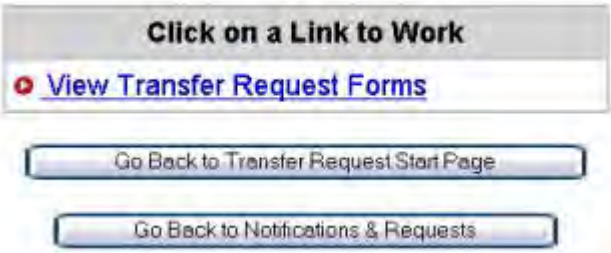


Figure 1 Click on a Link to Work screen. The View Transfer Request Forms button is circled.

2. On the **Click on a Link to Work** screen (Figure 1), click **View Transfer Request Forms** to view the forms for the PI Transfer Request. The **Print Menu** screen displays (Figure 2) with a listing of the forms in the PI Transfer Request.

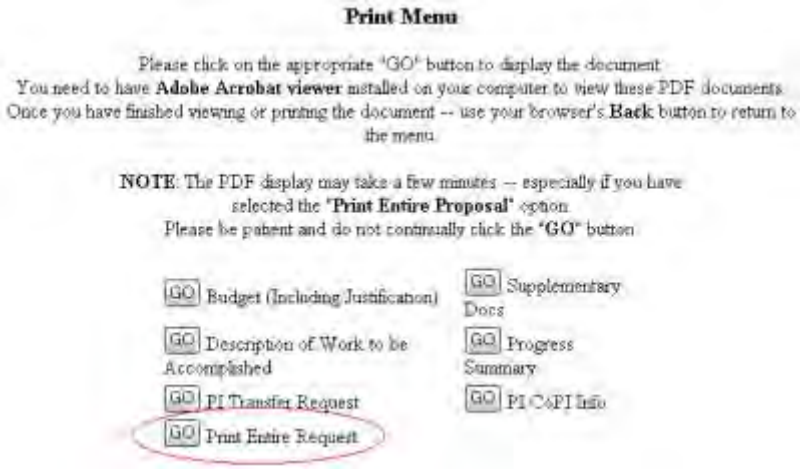


Figure 2 Print Menu screen. The Go button for Print Entire Request is circled.

3. To view a form, click the **Go** button for that form (Figure 2). The form displays in PDF format. If you need to download Adobe Reader, see Adobe Reader for FastLane.
4. To view the entire PI Transfer Request, click the **Go** button for **Print Entire Request** (Figure 2). The **Grant Transfer Request** screen displays in PDF format (Figure 3).

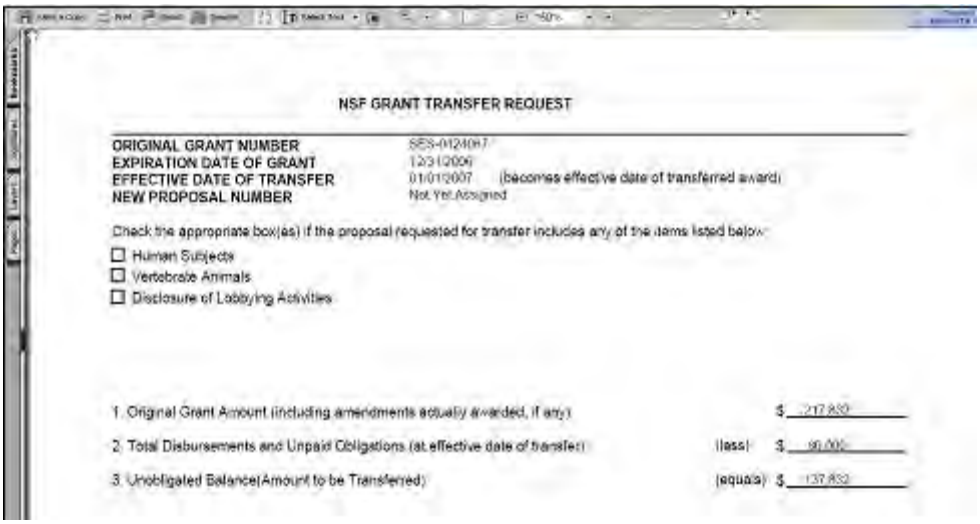


Figure 3 NSF Grant Transfer Request screen. The Printer icon is circled.

5. To print the PI Transfer Request, click the **Printer** icon on the upper left of the **Grant Transfer Request** screen (Figure 3). The form is printed.
6. Click the browser back button to return to the **Print Menu** screen (Figure 2).

New SPO Functions

Work on a PI Transfer Request Forwarded by the Original AOR

1. Access the **Notifications and Requests** screen on the **Forwarded by PI** tab displays (Figure 1) (see Access Notifications and Requests as an SPO/AOR).

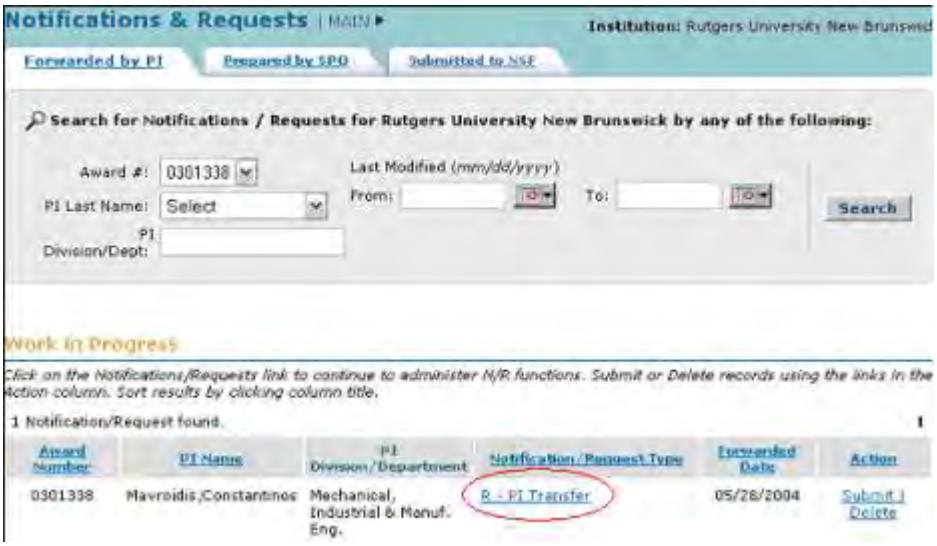


Figure 1 Notifications and Requests screen on the Forwarded by PI tab. The Notification/Request Type link is circled for a PI Transfer Request.

2. Find the PI Transfer Request you want to work on (see Search for Notifications and Requests Forwarded by the PI).
3. Click the **Notification/Request Type** link on the row for that request (Figure 1). The **Grant Transfer Request** screen displays (Figure 2).

GRANT TRANSFER REQUEST

Current status of the request: PI working on the request

Award Information PAPPG

Original Grant Number : DMS-1600327 End Date of Grant: 06/30/2019
Title : Local Inverse Problems
Original Grantee Name : Purdue University
and Address Young Hall
155 S Grant Street
West Lafayette, IN 479072114
US
Time Zone : US-America/New_York(GMT-5:00)

Request Details

Start Date of Transfer (mm/dd/yyyy) 12/30/2016

Transfer Organization
[New Awardee Organization]

MIT Lincoln Laboratory
Lincoln Lab
244 Wood Street
Lexington, MA 02420-9108
(View contact information)
US-America/New_York(GMT-5:00)
Select New Awardee Organization

[New Primary Place of Performance]

MIT Lincoln Laboratory

AL
Add/Change New Primary Place Of Performance

Original Grant Amount
(including amendments actually awarded, if any) $250,000.00

Total Disbursements and Unpaid Obligations(at start date of transfer) 15071
[Note: Please enter the amount as whole number only, do not use special characters, such as dollar sign or comma.]

Unobligated Balance
(Amount to be Transferred) $234,929.00 Calculate

This is the single opportunity to provide the correct dollar amount to be transferred; please make sure it is reconciled prior to final submission of this request to NSF. Upon transfer of the grant to the new organization, any monetary discrepancies must be resolved between the original and the new grantee. NSF will not intervene in any disputes between the two organizations regarding the transferred amount.

The proposal requested for transfer includes any of the items listed below:

Human subjects: No
Vertebrate animals: No
Disclosure of lobbying activities: No

FY2018: $125,000.00 Outstanding Increments:

Save & Continue Go Back

Send Comments to NSF

Figure 2 Grant Transfer Request screen. The Save and Continue button is circled.

4. On the lower portion of the **Grant Transfer Request** screen (Figure 3), *if the project involves any of the following*, click the radio button next to the category:
   - Human subjects
   - Vertebrate animals
   - Disclosure of lobbying activities (see "Disclosing Lobbying Activities")

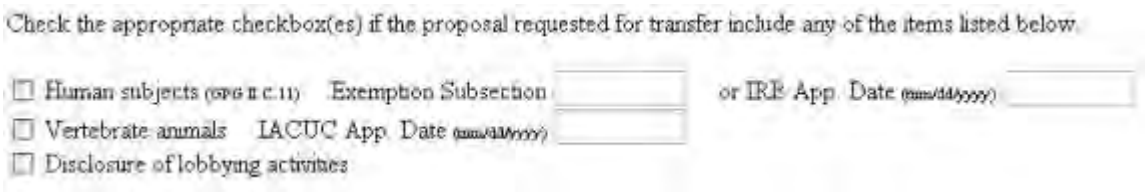


Figure 3 Lower portion of the Grant Transfer Request screen.

5. On the lower portion of the **Grant Transfer Request** screen (Figure 3), do either of the following:
   - In the **Exemption Subsection** box, type the exemption number.
   - In the **IRB APP Date** box, type the IRB date (in mm/dd/yyyy format).
6. In the lower portion of the **Grant Transfer Request screen** (Figure 3), in the **IACUC App. Date** box, type the date (in mm/dd/yyyy format).
7. Click the **Save and Continue** button (Figure 2). The **Click on a Link to Work** screen displays (Figure 4). You have these options on the **Click on a Link to Work** screen:
   - Edit transfer request forms
   - Check for completeness
   - Submit transfer request to NSF(AOR only)
   - Return transfer request to the original SPO
   - Cancel (delete) transfer request

Figure 4 Click on a Link to Work screen with the new SPO's options for working on the PI Transfer Request.

Work on a PI Transfer Request Forwarded by the Original AOR

1. Access the **Notifications and Requests** screen on the **Forwarded by PI** tab displays (Figure 1) (see Access Notifications and Requests as an SPO/AOR).

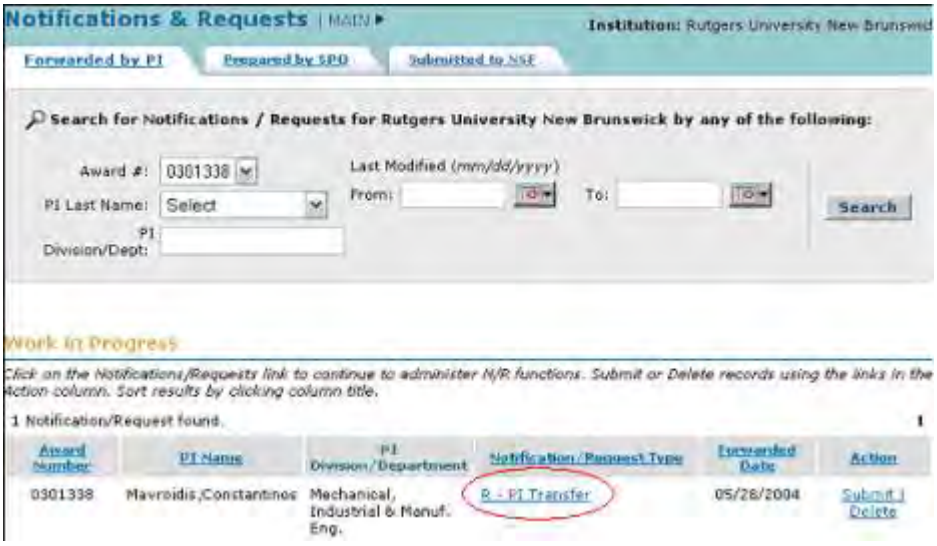


Figure 1 Notifications and Requests screen on the Forwarded by PI tab. The Notification/Request Type link is circled for a PI Transfer Request.

2. Find the PI Transfer Request you want to work on (see Search for Notifications and Requests Forwarded by the PI).
3. Click the **Notification/Request Type** link on the row for that request (Figure 1). The **Grant Transfer Request** screen displays (Figure 2).

GRANT TRANSFER REQUEST

Current status of the request: PI working on the request

Award Information PAPPG

Original Grant Number : DMS-1600327 End Date of Grant: 06/30/2019
Title : Local Inverse Problems
Original Grantee Name : Purdue University
and Address Young Hall
155 S Grant Street
West Lafayette, IN 479072114
US
Time Zone : US-America/New_York(GMT-5:00)

Request Details

Start Date of Transfer (mm/dd/yyyy) 12/30/2016

Transfer Organization
[New Awardee Organization]

MIT Lincoln Laboratory
Lincoln Lab
244 Wood Street
Lexington, MA 02420-9108
(View contact information)
US-America/New_York(GMT-5:00)
Select New Awardee Organization

[New Primary Place of Performance]

MIT Lincoln Laboratory

AL
Add/Change New Primary Place Of Performance

Original Grant Amount
(including amendments actually awarded, if any) $250,000.00

Total Disbursements and Unpaid Obligations(at start date of transfer) 15071
[Note: Please enter the amount as whole number only, do not use special characters, such as dollar sign or comma.]

Unobligated Balance
(Amount to be Transferred) $234,929.00 Calculate

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The proposal requested for transfer includes any of the items listed below:

Human subjects: No
Vertebrate animals: No
Disclosure of lobbying activities: No

FY2018: $125,000.00 Outstanding Increments:

Save & Continue Go Back

Send Comments to NSF

Figure 2 Grant Transfer Request screen. The Save and Continue button is circled.

4. On the lower portion of the **Grant Transfer Request** screen (Figure 3), *if the project involves any of the following*, click the radio button next to the category:
   - Human subjects
   - Vertebrate animals
   - Disclosure of lobbying activities (see "Disclosing Lobbying Activities")

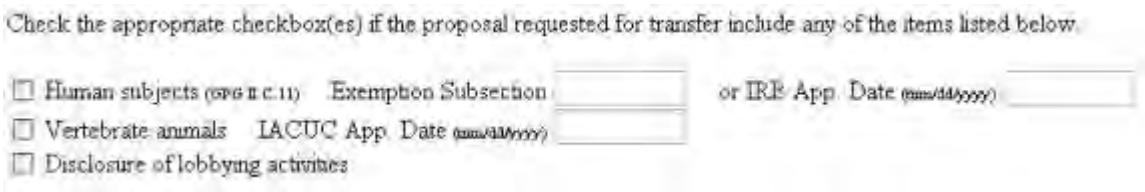


Figure 3 Lower portion of the Grant Transfer Request screen.

5. On the lower portion of the **Grant Transfer Request** screen (Figure 3), do either of the following:
   - In the **Exemption Subsection** box, type the exemption number.
   - In the **IRB APP Date** box, type the IRB date (in mm/dd/yyyy format).
6. In the lower portion of the **Grant Transfer Request screen** (Figure 3), in the **IACUC App. Date** box, type the date (in mm/dd/yyyy format).
7. Click the **Save and Continue** button (Figure 2). The **Click on a Link to Work** screen displays (Figure 4). You have these options on the **Click on a Link to Work** screen:
   - Edit transfer request forms
   - Check for completeness
   - Submit transfer request to NSF(AOR only)
   - Return transfer request to the original SPO
   - Cancel (delete) transfer request

Figure 4 Click on a Link to Work screen with the new SPO's options for working on the PI Transfer Request.

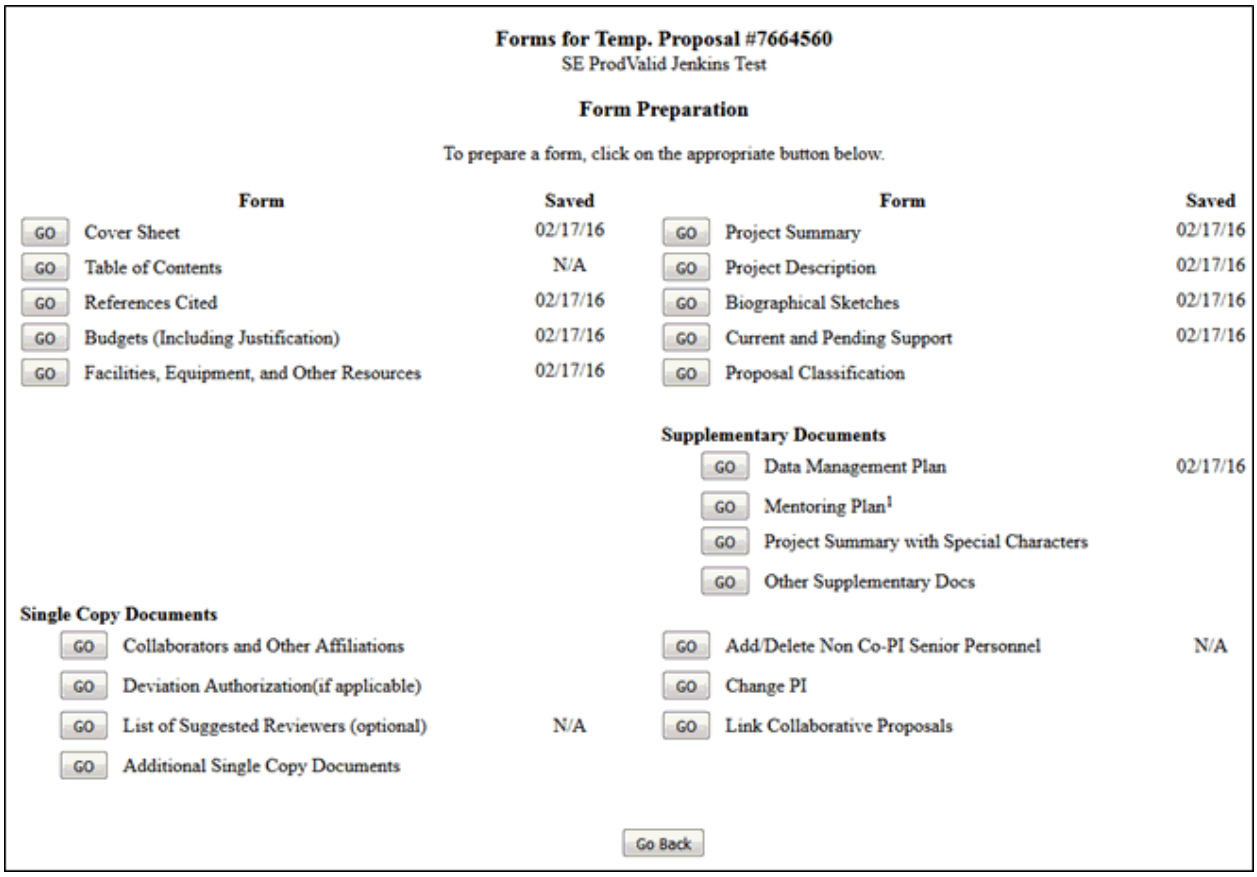
Edit Transfer Request Forms as New SPO

1. Access the **Click on a Link to Work** screen (Figure 1) (see Work on a PI Transfer Request Forwarded by the Original AOR).

Figure 1 Click on a Link to Work screen. The Edit Transfer Request Forms link is circled.

2. On the **Click on a Link to Work** screen (Figure 1), click **Edit Transfer Request Forms**. The **Form Preparation** screen displays (Figure 2) with the forms for the PI Transfer Request. The forms are:
   - Progress Summary (required)
   - Budgets (Including Justification) (required)
   - Description of Work to Be Accomplished (required)
   - Supplementary Documents
   - Add/Delete Senior Personnel

   (Click on a link above for the instructions for that form.)



Forms for Temp. Proposal #7664560
SE ProdValid Jenkins Test

Form Preparation

To prepare a form, click on the appropriate button below.

Form	Saved	Form	Saved
GO Cover Sheet	02/17/16	GO Project Summary	02/17/16
GO Table of Contents	N/A	GO Project Description	02/17/16
GO References Cited	02/17/16	GO Biographical Sketches	02/17/16
GO Budgets (Including Justification)	02/17/16	GO Current and Pending Support	02/17/16
GO Facilities, Equipment, and Other Resources	02/17/16	GO Proposal Classification	

Supplementary Documents

GO Data Management Plan	02/17/16
GO Mentoring Plan[1]	
GO Project Summary with Special Characters	
GO Other Supplementary Docs	

Single Copy Documents

GO Collaborators and Other Affiliations		GO Add/Delete Non Co-PI Senior Personnel	N/A
GO Deviation Authorization(if applicable)		GO Change PI	
GO List of Suggested Reviewers (optional)	N/A	GO Link Collaborative Proposals	
GO Additional Single Copy Documents			

Go Back

Figure 2 Form Preparation screen.

Check for Completeness as New SPO

1. Access the **Click on a Link to Work** screen (Figure 1) (see Work on a PI Transfer Request Forwarded by the Original AOR).

Figure 1 Click on a Link to Work screen. The Check for Completeness button is circled.

2. On the **Click on a Link to Work** screen (Figure 1), click **Check for Completeness**. The **Completeness Checking of Request for Grant Transfer** screen displays.

If the PI Transfer Request is incomplete, the **Completeness Checking of Request for Grant Transfer** screen displays as in Figure 2 with a message on which forms still require completion for submission.

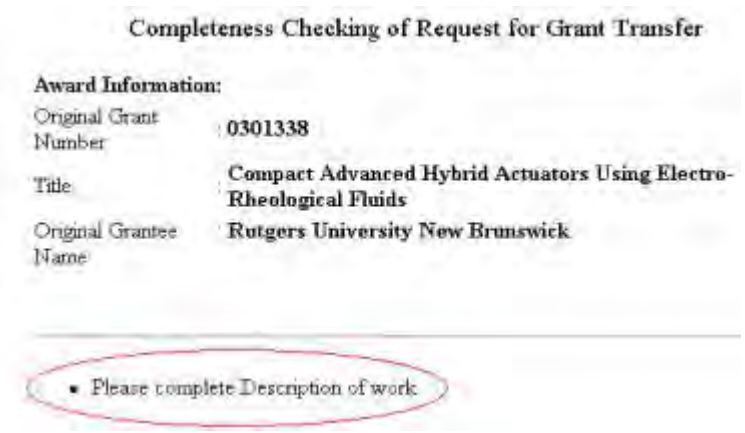
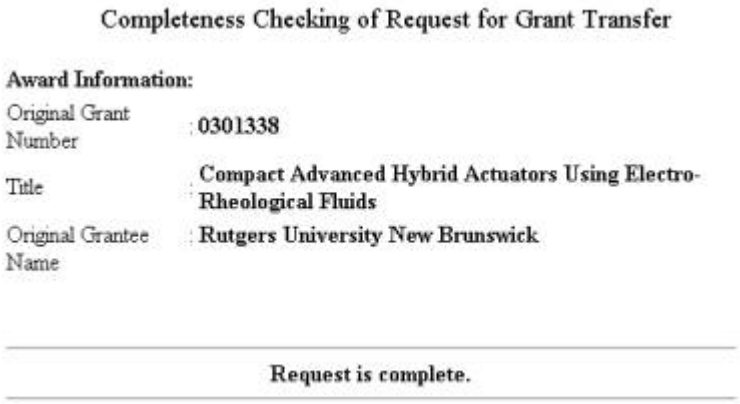


Figure 2 Completeness Checking of Request for Grant Transfer screen. Circled is the message of what form requires completion for submission.

If the PI Transfer Request is complete, the **Completeness Checking of Request for Grant Transfer** screen displays as in Figure 3. The request is ready to be submitted to NSF (see Submit a PI Transfer Request).



Completeness Checking of Request for Grant Transfer

Award Information:

Original Grant Number	: **0301338**
Title	: **Compact Advanced Hybrid Actuators Using Electro-Rheological Fluids**
Original Grantee Name	: **Rutgers University New Brunswick**

Request is complete.

Figure 3 Completeness Checking of Request for Grant Transfer screen with a message that the request is complete.

Submit a PI Transfer Request to NSF (AOR only)

Only the new SPO can submit the PI Transfer Request to NSF.

1. Access the **Click on a Link to Work** screen (Figure 1) (see Work on a PI Transfer Request Forwarded by the Original AOR).

Figure 1 Click on a Link to Work screen. The Submit Transfer Request to NSF link is circled.

2. On the **Click on a Link to Work** screen (Figure 1), click **Submit Transfer Request to NSF**.

If the request is not complete, the **Completeness Checking of Request for Grant Transfer** screen displays (Figure 2) with a message on what forms require completion for submission to NSF.

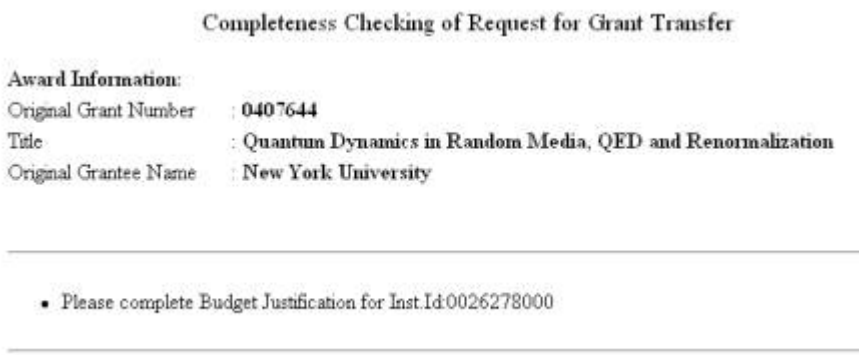


Figure 2 Completeness Checking of Request for Grant Transfer screen with the message on what needs to be completed for submission.

Click the **Go Back** button to return to the **Click on a Work to Link** screen (Figure 3) to complete the required forms (see Edit Transfer Budget Form Introduction).

If the request is complete, the **Grant Transfer Request Is Ready for Submission to NSF** screen displays (Figure 3).

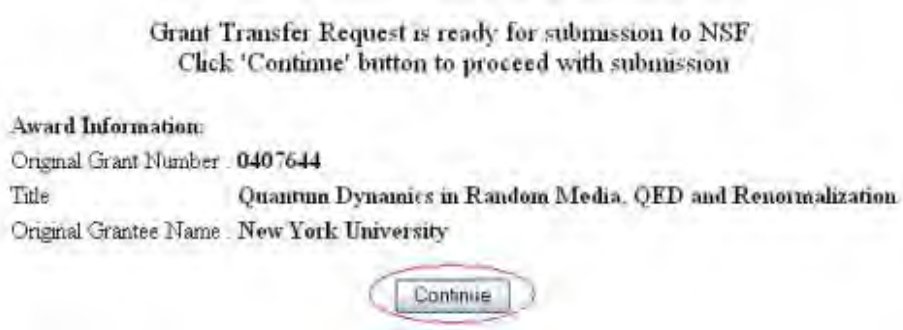
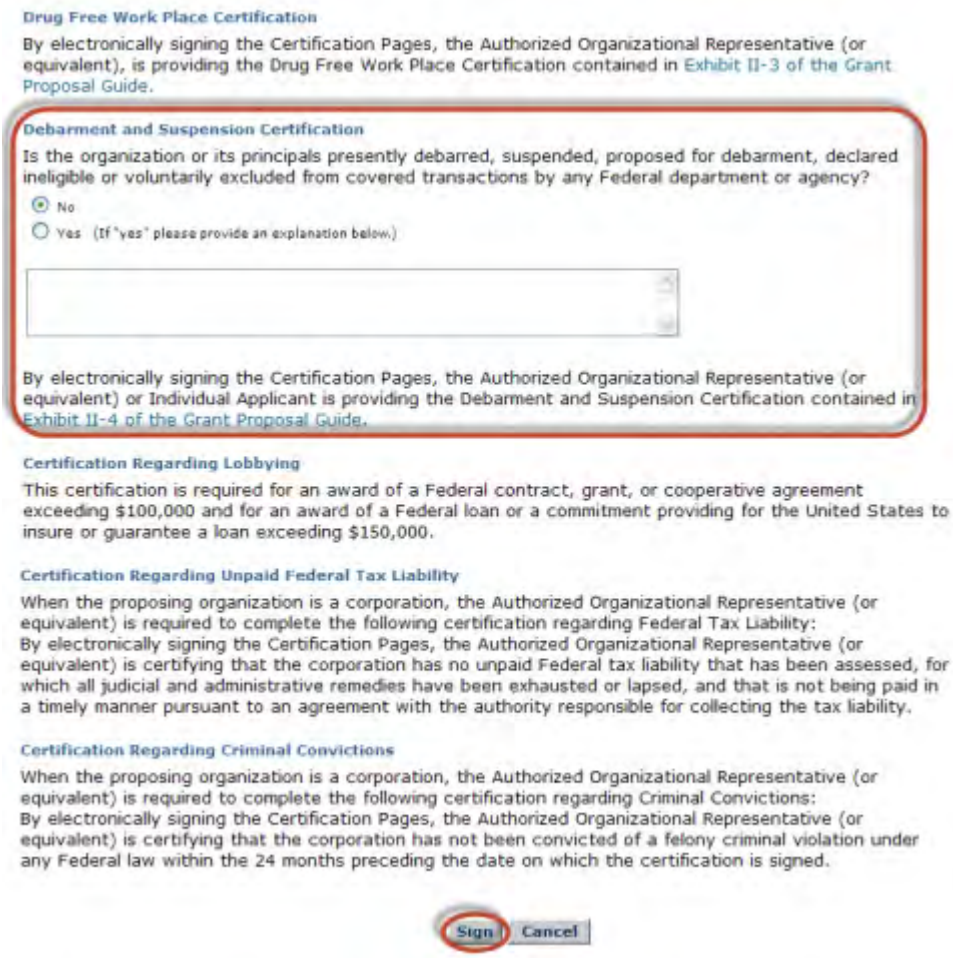


Figure 3 Grant Transfer Request Is Ready for Submission screen. The Continue button is circled.

3. Click the **Continue** button (Figure 3). The **Submit Grant Transfer Request to NSF** screen displays (Figure 4).



Drug Free Work Place Certification

By electronically signing the Certification Pages, the Authorized Organizational Representative (or equivalent), is providing the Drug Free Work Place Certification contained in Exhibit II-3 of the Grant Proposal Guide.

Debarment and Suspension Certification

Is the organization or its principals presently debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from covered transactions by any Federal department or agency?

No

Yes (If "yes" please provide an explanation below.)

By electronically signing the Certification Pages, the Authorized Organizational Representative (or equivalent) or Individual Applicant is providing the Debarment and Suspension Certification contained in Exhibit II-4 of the Grant Proposal Guide.

Certification Regarding Lobbying

This certification is required for an award of a Federal contract, grant, or cooperative agreement exceeding $100,000 and for an award of a Federal loan or a commitment providing for the United States to insure or guarantee a loan exceeding $150,000.

Certification Regarding Unpaid Federal Tax Liability

When the proposing organization is a corporation, the Authorized Organizational Representative (or equivalent) is required to complete the following certification regarding Federal Tax Liability:
By electronically signing the Certification Pages, the Authorized Organizational Representative (or equivalent) is certifying that the corporation has no unpaid Federal tax liability that has been assessed, for which all judicial and administrative remedies have been exhausted or lapsed, and that is not being paid in a timely manner pursuant to an agreement with the authority responsible for collecting the tax liability.

Certification Regarding Criminal Convictions

When the proposing organization is a corporation, the Authorized Organizational Representative (or equivalent) is required to complete the following certification regarding Criminal Convictions:
By electronically signing the Certification Pages, the Authorized Organizational Representative (or equivalent) is certifying that the corporation has not been convicted of a felony criminal violation under any Federal law within the 24 months preceding the date on which the certification is signed.

Sign Cancel

Figure 4 Submit Grant Transfer Request to NSF screen. The Debarment and Suspension Certification section and the Submit button are circled.

4. In the **Debarment and Suspension Certification** section (Figure 4), click the radio button for Yes or No.
5. If you clicked the radio button for Yes, type an explanation in the box (Figure 4).
6. Click the **Sign and Submit** button (Figure 6). The **Grant Transfer Request Submitted to NSF** screen displays (Figure 5) with a list of the people who will receive an email that the request has been submitted to NSF.

Figure 5 Grant Transfer Request Submitted to NSF screen with the list of the individuals who will be notified on the new status of the PI Transfer Request. The Continue button is circled.

10. Click the **Continue** button (Figure 5). The **Click on a Link to Work** screen displays (Figure 6) with only the option to view the transfer request.

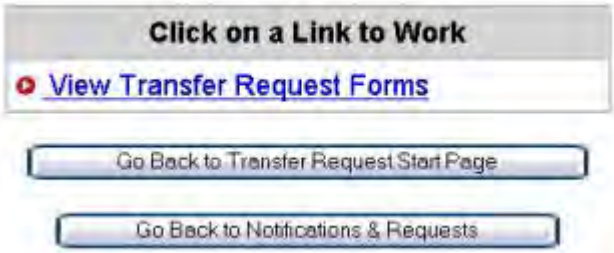


Figure 6 Click on a Link to Work screen after you have submitted the PI Transfer Request to NSF.

Return a PI Transfer Request to the Original SPO

1. Access the **Click on a Link to Work** screen (Figure 1) (see Work on a PI Transfer Request Forwarded by the Original AOR).

Figure 1 Click on a Link to Work screen. The Return Transfer Request to Original SPO link is circled.

2. On the **Click on a Link to Work** screen (Figure 1), click **Return Transfer Request to Original SPO**. The **Return the Grant Transfer Request to Original SPO** screen displays (Figure 2).

Figure 2 Return the Grant Transfer Request to Original SPO screen. The Return button is circled.

3. Click the **Return** button (Figure 2). The **Grant Transfer Request Returned to Original SPO** screen displays (Figure 3) with a list of the recipients of an email communicating that the PI Transfer Request has been returned to the original SPO.

Figure 3 Grant Transfer Request Returned to Original SPO screen with a list of the individuals who will be notified of the status of the PI Transfer Request. The Continue button is circled.

4. Click the **Continue** button (Figure 3). The **Click on a Link to Work** screen displays (Figure 4) with these options:
   - View transfer request forms
   - Cancel (delete) the transfer request

Figure 4 Click on a Link to Work screen after you have returned a PI Transfer Request to the original SPO.

Delete a PI Transfer Request as New SPO

1. Access the **Click on a Link to Work** screen (Figure 1) (see Work on a PI Request Forwarded by the Original AOR).

Figure 1 Click on a Link to Work screen. The Cancel Transfer Request link is circled.

2. On the **Click on a Link to Work** screen (Figure 1), click **Cancel Transfer Request**. The **Delete the Grant Transfer Request** screen displays (Figure 2) with a message for you to confirm that you want to delete the PI Transfer Request.

Figure 2 Delete the Grant Transfer Request screen. The Delete button is circled.

3. Click the **Delete** button (Figure 2). The **Grant Transfer Request Deleted** screen displays (Figure 3) with the message that the PI Transfer Request has been deleted and with a list of people who will be notified by email of the deletion.

Figure 3 Grant Transfer Request Deleted screen.

View a PI Transfer Request as New SPO

1. Access the **Click on a Link to Work** screen (Figure 1) (see Submit a PI Transfer to NSF (AOR only) or Return a PI Transfer Request to the Original SPO).

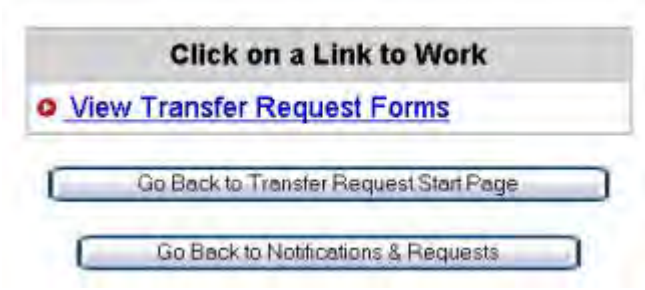


Figure 1 Click on a Link to Work screen. The View Transfer Request button is circled.

2. On the **Click on a Link to Work** screen (Figure 1), click **View Transfer Request Forms** to view the forms for the PI Transfer Request. The **Print Menu** screen displays (Figure 2) with a listing of the forms in the PI Transfer Request.

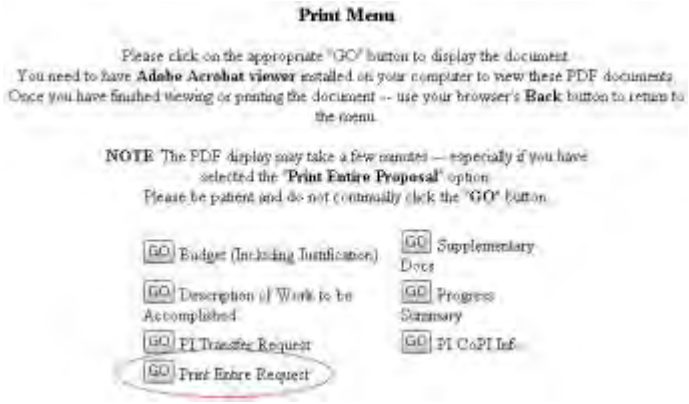
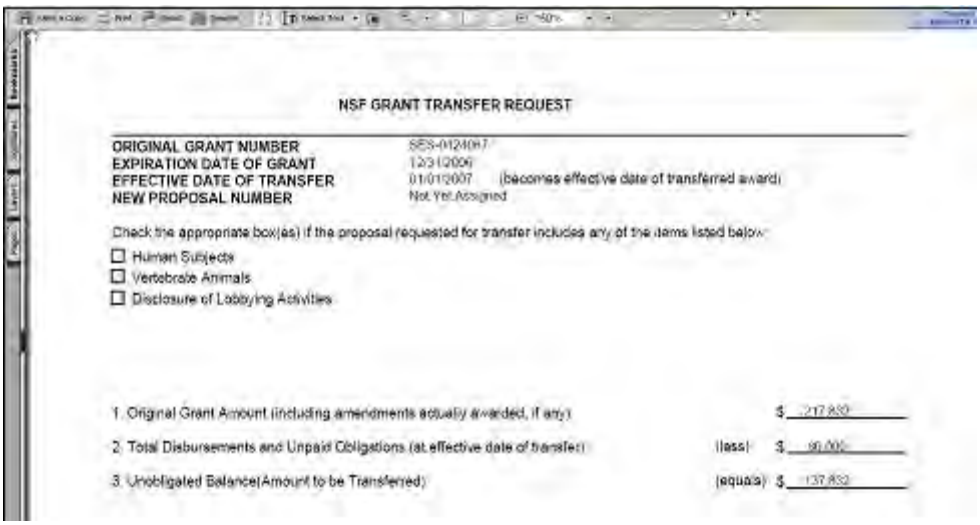


Figure 2 Print Menu screen for the PI Transfer Request. The Go button for Print Entire Request is circled.

3. To view a form, click the **Go** button for that form (Figure 2). The form displays in PDF format. If you need to download Adobe Reader, see Adobe Reader for FastLane.
4. To view the entire PI Transfer Request, click the **Go** button (Figure 2) for **Print Entire Request**. The **NSF Grant Transfer Request** screen displays in PDF format (Figure 3).



NSF GRANT TRANSFER REQUEST

ORIGINAL GRANT NUMBER SES-012409?
EXPIRATION DATE OF GRANT 12/31/2006
EFFECTIVE DATE OF TRANSFER 01/01/2007 (becomes effective date of transferred award)
NEW PROPOSAL NUMBER Not Yet Assigned

Check the appropriate box(es) if the proposal requested for transfer includes any of the items listed below:

- ☐ Human Subjects
- ☐ Vertebrate Animals
- ☐ Disclosure of Lobbying Activities

1. Original Grant Amount (including amendments actually awarded, if any) $ 217,832
2. Total Disbursements and Unpaid Obligations (at effective date of transfer) (less) $ 80,000
3. Unobligated Balance(Amount to be Transferred) (equals) $ 137,832

Figure 3 NSF Grant Transfer Request screen.

5. To print the PI Transfer Request, click the **Printer** icon on the top left of the **NSF Grant Transfer Request** screen (Figure 3). The form is printed.
6. Click the browser back button to return to the **Print Menu** screen (Figure 2).

PI Transfer Forms

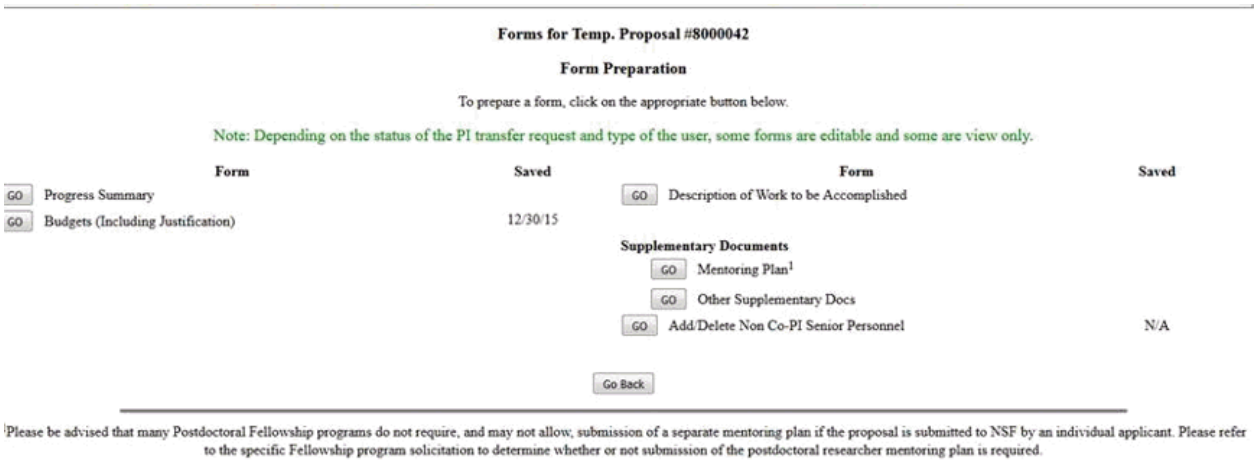
Edit Transfer Request Forms Introduction

1. Access the **Click on a Link to Work** screen (Figure 1):
   - If you are a PI, see Prepare a PI Transfer Request as a PI.
   - If you are the original SPO, see either of the following:
     - Prepare a PI Transfer Request as an SPO/AOR
     - Work on a PI Transfer Request Forwarded by a PI
   - If you are the new SPO, see Work on a PI Transfer Request Forwarded by the Original AOR.

Figure 1 Click on a Link to Work screen (as it displays in the case of the PI). The Edit Transfer Request Forms link is circled.

2. On the **Click on a Link to Work** screen (Figure 1), click **Edit Transfer Request Forms**. The **Form Preparation** screen displays (Figure 2) with the forms for the PI Transfer Request. The forms are:
   - Progress Summary (required)
   - Budgets (Including Justification) (required)
   - Description of Work to Be Accomplished (required)
   - Supplementary Documents
   - Add/Delete Senior Personnel

   (Click on a link above for the instructions for that form.)



Forms for Temp. Proposal #8000042

Form Preparation

To prepare a form, click on the appropriate button below.

Note: Depending on the status of the PI transfer request and type of the user, some forms are editable and some are view only.

Form	Saved	Form	Saved
GO Progress Summary		GO Description of Work to be Accomplished	
GO Budgets (Including Justification)	12/30/15		
		Supplementary Documents	
		GO Mentoring Plan[1]	
		GO Other Supplementary Docs	
		GO Add/Delete Non Co-PI Senior Personnel	N/A

Go Back

[1]Please be advised that many Postdoctoral Fellowship programs do not require, and may not allow, submission of a separate mentoring plan if the proposal is submitted to NSF by an individual applicant. Please refer to the specific Fellowship program solicitation to determine whether or not submission of the postdoctoral researcher mentoring plan is required.

Figure 2 Form Preparation screen.

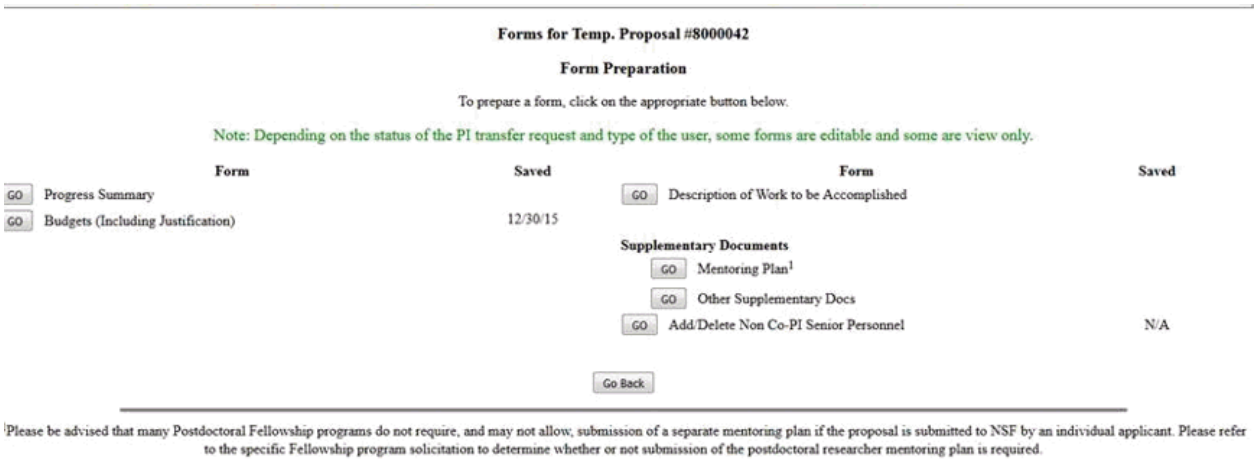
Edit Transfer Request Forms Introduction

1. Access the **Click on a Link to Work** screen (Figure 1):
   - If you are a PI, see Prepare a PI Transfer Request as a PI.
   - If you are the original SPO, see either of the following:
     - Prepare a PI Transfer Request as an SPO/AOR
     - Work on a PI Transfer Request Forwarded by a PI
   - If you are the new SPO, see Work on a PI Transfer Request Forwarded by the Original AOR.

Figure 1 Click on a Link to Work screen (as it displays in the case of the PI). The Edit Transfer Request Forms link is circled.

2. On the **Click on a Link to Work** screen (Figure 1), click **Edit Transfer Request Forms**. The **Form Preparation** screen displays (Figure 2) with the forms for the PI Transfer Request. The forms are:
   - Progress Summary (required)
   - Budgets (Including Justification) (required)
   - Description of Work to Be Accomplished (required)
   - Supplementary Documents
   - Add/Delete Senior Personnel

   (Click on a link above for the instructions for that form.)



Forms for Temp. Proposal #8000042

Form Preparation

To prepare a form, click on the appropriate button below.

Note: Depending on the status of the PI transfer request and type of the user, some forms are editable and some are view only.

Form	Saved	Form	Saved
GO Progress Summary		GO Description of Work to be Accomplished	
GO Budgets (Including Justification)	12/30/15		
		Supplementary Documents	
		GO Mentoring Plan[1]	
		GO Other Supplementary Docs	
		GO Add/Delete Non Co-PI Senior Personnel	N/A

Go Back

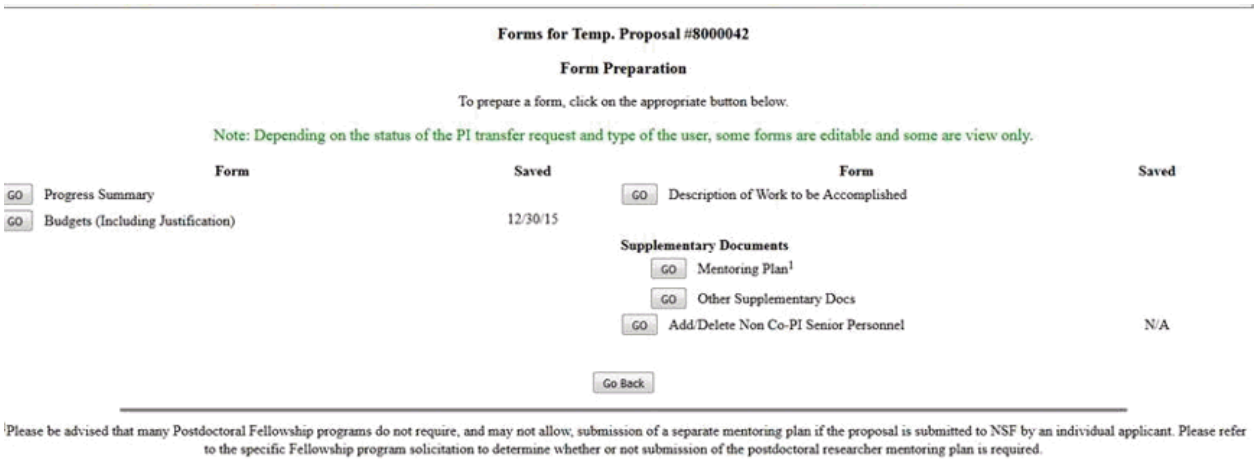
[1]Please be advised that many Postdoctoral Fellowship programs do not require, and may not allow, submission of a separate mentoring plan if the proposal is submitted to NSF by an individual applicant. Please refer to the specific Fellowship program solicitation to determine whether or not submission of the postdoctoral researcher mentoring plan is required.

Figure 2 Form Preparation screen.

Progress Summary for PI Transfer

The Progress Summary is a required form.

1. Access the **Form Preparation** screen (Figure 1) (see Edit Transfer Request Forms Introduction).



Forms for Temp. Proposal #8000042

Form Preparation

To prepare a form, click on the appropriate button below.

Note: Depending on the status of the PI transfer request and type of the user, some forms are editable and some are view only.

Form	Saved	Form	Saved
GO Progress Summary		GO Description of Work to be Accomplished	
GO Budgets (Including Justification)	12/30/15		
		Supplementary Documents	
		GO Mentoring Plan[1]	
		GO Other Supplementary Docs	
		GO Add/Delete Non Co-PI Senior Personnel	N/A

Go Back

[1]Please be advised that many Postdoctoral Fellowship programs do not require, and may not allow, submission of a separate mentoring plan if the proposal is submitted to NSF by an individual applicant. Please refer to the specific Fellowship program solicitation to determine whether or not submission of the postdoctoral researcher mentoring plan is required.

Figure 1 Form Preparation screen. The Go button for Progress Summary is circled.

2. On the PI Transfer **Form Preparation** screen (Figure 1), click the **Go** button for Progress Summary. The **Progress Summary** screen displays (Figure 2). You have these options:
   - Enter the Progress Summary in the text box
   - Upload the Progress Summary

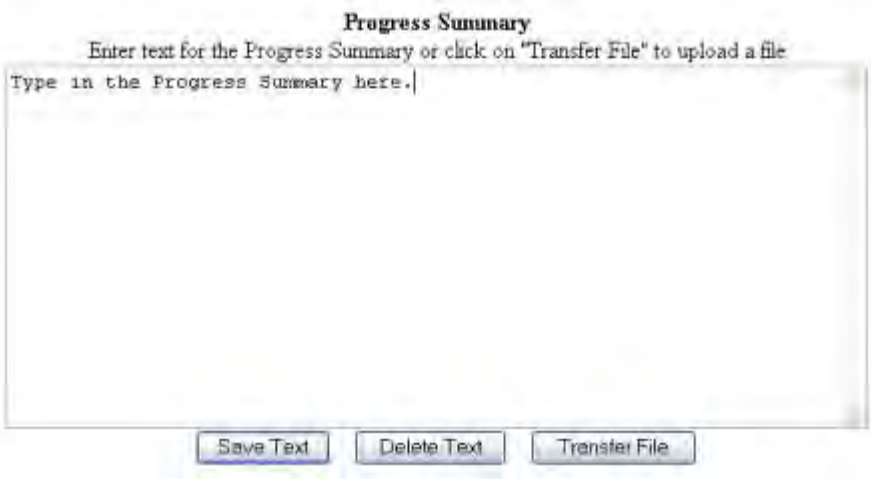


Figure 2 Progress Summary screen.

Enter the Progress Summary in the Text Box

1. On the **Progress Summary** screen (Figure 2), in the **Progress Summary** box type or copy and paste the progress status for the project.
2. Click the **Save Text** button (Figure 2). A screen displays (Figure 3) with the message that the Progress Summary form has been saved.

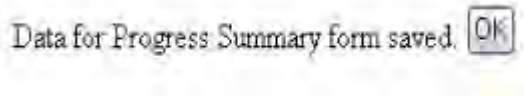


Figure 3 Screen with the message that the Progress Summary has been saved.

3. Click the **OK** button (Figure 3). The PI Transfer **Form Preparation** screen displays.

Upload a Progress Summary

1. Prepare a word-processing document with the Progress Summary.
2. On the **Progress Summary** screen (Figure 2), click the **Transfer File** button. The **Progress Summary File Upload** screen displays (Figure 4). See Upload a File for instructions on how to upload the file.

Figure 4 Progress Summary File Upload screen.

3. Once you have accepted the upload, the **Progress Summary File Upload** screen displays (Figure 5) with these options:
   - View the current Progress Summary
   - Delete the current Progress Summary
   - Upload a new Progress Summary

Figure 5 Progress Summary File Upload screen with options to view and delete the uploaded Progress Summary.

Display Current Progress Summary

Click the **Display Current Progress Summary** button (Figure 5). The previously uploaded Progress Summary displays in PDF format. If you need to download Adobe Reader, see Adobe Reader for FastLane.

Delete Current Progress Summary

1. Click the **Delete Current Progress Summary** button (Figure 5). A screen displays with a message for you to confirm that you want to delete the file.
2. Click the **OK** button. The document is deleted.

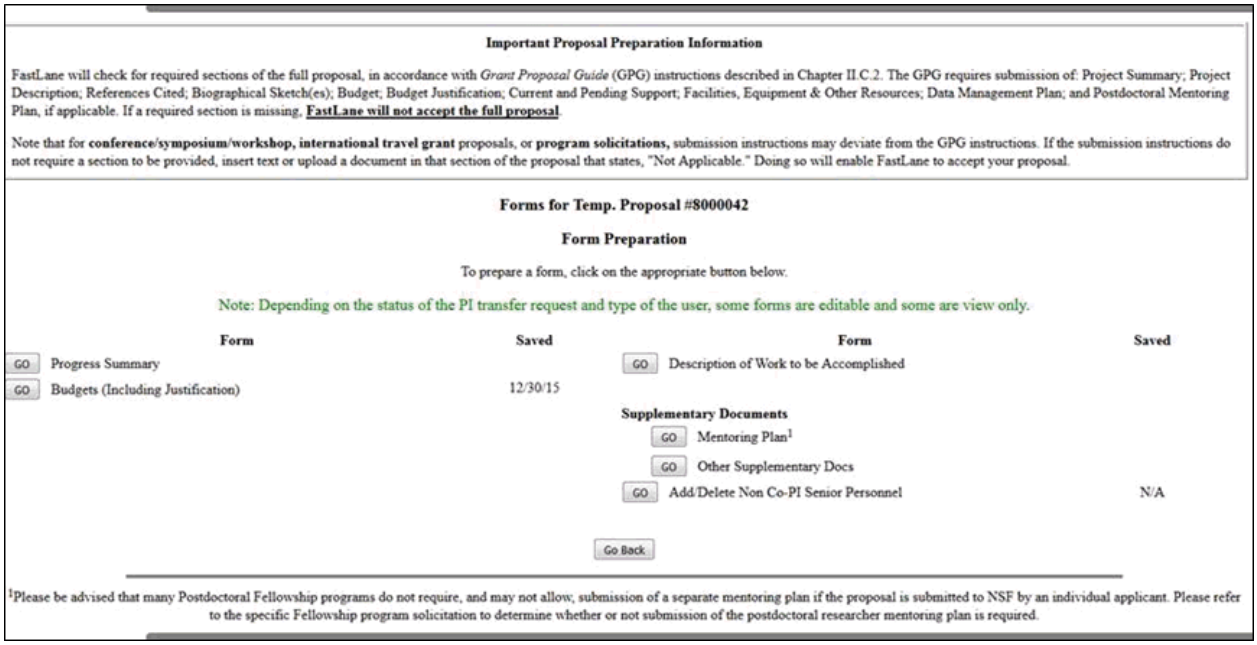
Upload a New Progress Summary

Follow the directions in Upload a File. Uploading a new Progress Summary automatically replaces the previous one.

Budgets (Including Justification) for PI Transfer

The Budgets (Including Justification) is a required form.

1. Access the **Form Preparation** screen (Figure 1) (see Edit Transfer Request Forms Introduction).



Important Proposal Preparation Information

FastLane will check for required sections of the full proposal, in accordance with *Grant Proposal Guide* (GPG) instructions described in Chapter II.C.2. The GPG requires submission of: Project Summary; Project Description; References Cited; Biographical Sketch(es); Budget; Budget Justification; Current and Pending Support; Facilities, Equipment & Other Resources; Data Management Plan; and Postdoctoral Mentoring Plan, if applicable. If a required section is missing, **FastLane will not accept the full proposal**.

Note that for **conference/symposium/workshop, international travel grant** proposals, or **program solicitations,** submission instructions may deviate from the GPG instructions. If the submission instructions do not require a section to be provided, insert text or upload a document in that section of the proposal that states, "Not Applicable." Doing so will enable FastLane to accept your proposal.

Forms for Temp. Proposal #8000042

Form Preparation

To prepare a form, click on the appropriate button below.

Note: Depending on the status of the PI transfer request and type of the user, some forms are editable and some are view only.

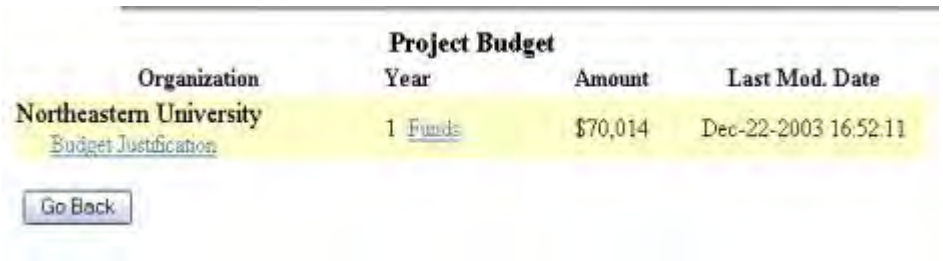
Form	Saved	Form	Saved
GO Progress Summary		GO Description of Work to be Accomplished	
GO Budgets (Including Justification)	12/30/15	**Supplementary Documents**	
		GO Mentoring Plan[1]	
		GO Other Supplementary Docs	
		GO Add/Delete Non Co-PI Senior Personnel	N/A

Go Back

[1]Please be advised that many Postdoctoral Fellowship programs do not require, and may not allow, submission of a separate mentoring plan if the proposal is submitted to NSF by an individual applicant. Please refer to the specific Fellowship program solicitation to determine whether or not submission of the postdoctoral researcher mentoring plan is required.

Figure 1 Form Preparation screen. The Go button for Budgets (Including Justification) is circled.

2. On the PI Transfer **Form Preparation** screen (Figure 1), click the **Go** button for Budgets (Including Justification). The **Project Budget** screen displays (Figure 2).



Project Budget

Organization	Year	Amount	Last Mod. Date
Northeastern University Budget Justification	1 Funds	$70,014	Dec-22-2003 16:52:11

Go Back

Figure 2 Project Budget screen.

See Budgets (Including Justification) and Create a Budget, Step 2 for instructions on how complete a budget for the subawardee organization.

Description of Work to be Accomplished for PI Transfer

The Description of Work to be Accomplished is a required form.

1. Prepare a Description of Work to be Accomplished in a word-processing document. See Acceptable Formats for FastLane for a list of all the formats that FastLane accepts.
2. Access the **Form Preparation** screen (Figure 1) (see Edit Transfer Request Forms Introduction).

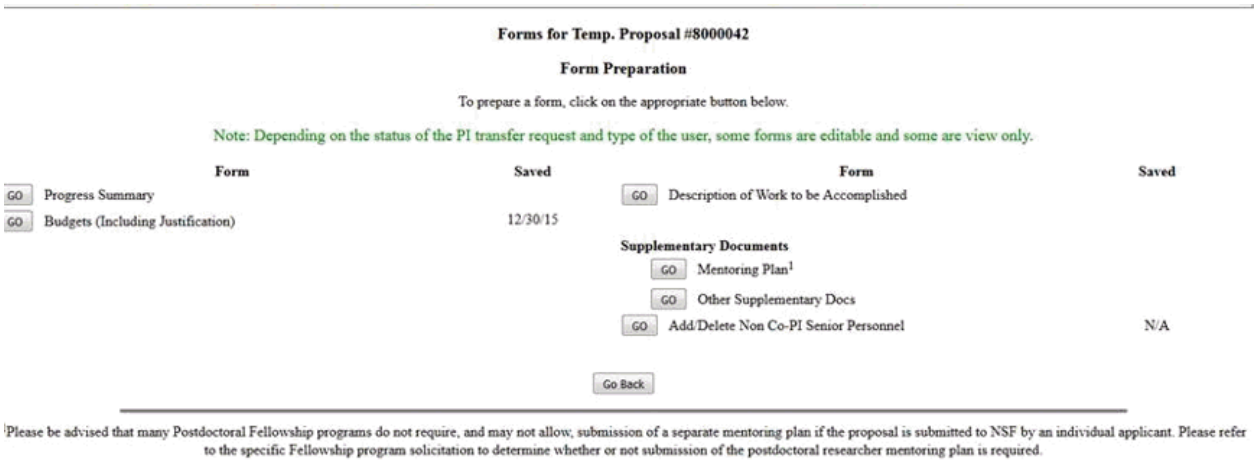


Figure 1 Form Preparation screen. The Go button for Description of Work to be Accomplished is circled.

3. On the **Form Preparation** screen (Figure 1), click the **Go** button for Description of Work to be Accomplished. The **Description of Work to be Accomplished File Upload** screen displays (Figure 2).

Figure 2 Description of Work to be Accomplished File Upload screen.

4. Follow the directions in Upload a File to upload the Description of Work to be Accomplished. When you have accepted the upload, the **Description of Work to be Accomplished File Upload** screen displays (Figure 3) with these options:
   - Display Current Description of Work to be Accomplished

- Delete Current Description of Work to be Accomplished
- Upload a New Description of Work to be Accomplished

Figure 3 Description of Work to be Accomplished Upload screen with options to View or Delete an uploaded Description of Work to be Accomplished.

Display Current Description of Work to be Accomplished

Click the **Display Current Description of Work to be Accomplished** button (Figure 3). The file displays in PDF format. If you need to download Adobe Reader, see Adobe Reader for FastLane.

Delete Current Description of Work to be Accomplished

1. Click the **Delete Current Description of Work to be Accomplished** button (Figure 3). A screen displays with a message for you to confirm that you want to delete the file.
2. Click the **OK** button. The PI Transfer **Form Preparation** screen displays (Figure 1).

Upload a New Description of Work to be Accomplished

Follow the directions in Upload a File. Uploading a new Description of Work to be Accomplished automatically replaces the file that was previously uploaded.

Supplementary Documents for PI Transfer

1. Access the **Form Preparation** screen (Figure 1) (see Edit Transfer Request Forms Introduction).

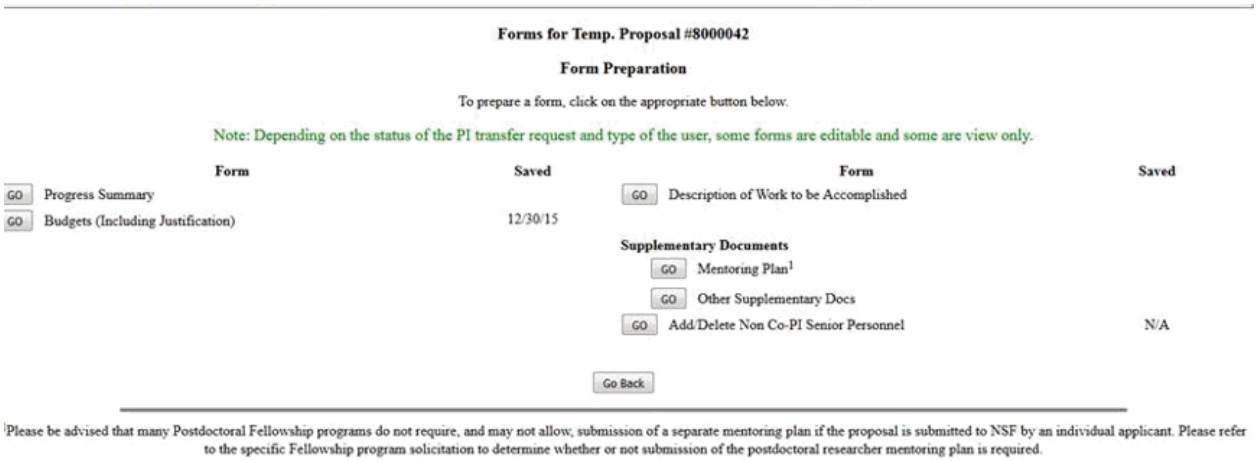


Figure 1 Form Preparation screen. The Go button for Other Supplementary Docs is circled.

2. On the PI Transfer **Form Preparation** screen (Figure 1), click the **Go** button for Supplementary Docs. The **Other Supplementary Docs** screen displays (Figure 2). You have two options on this screen:
   - Enter Other Supplementary Documents in the text box
   - Upload Supplementary Documents

Figure 2 Supplementary Docs screen. The Save Text button is circled.

Enter Other Supplementary Documents in the Text Box

1. Type in or copy and paste the Other Supplementary Document in the text box (Figure 2).
2. Click the **Save Text** button (Figure 2). A screen displays (Figure 3) with the message that the Supplementary Document data is saved.

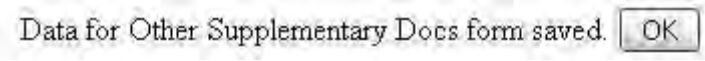


Figure 3 Screen with the message that the Other Supplementary Document text has been saved.

4. Click the **OK** button (Figure 2). The **Form Preparation** screen displays.

Upload Other Supplementary Documents

1. On the **Other Supplementary Docs** screen (Figure 4), click the **Transfer File** button. The **Supplementary Document File Upload** screen displays (Figure 5). See Upload a File for directions.

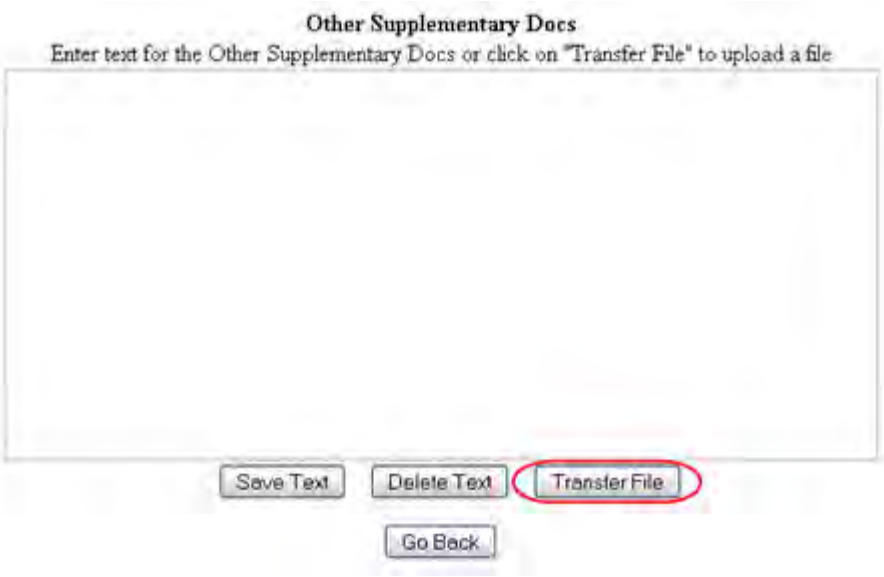


Figure 4 Other Supplementary Docs screen. The Transfer File button is circled.

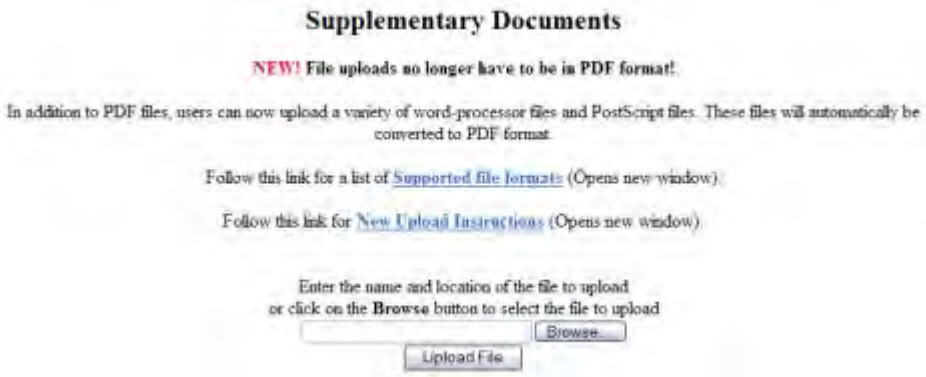


Figure 5 Supplementary Documents File Upload screen.

Once the Supplementary Document has been uploaded, the **Supplementary Document File Upload** screen displays as in Figure 6.

Figure 6 Supplementary Document File Upload screen after a file has been uploaded.

This screen gives you these options:

- Display Current Supplementary Docs
- Delete Current Supplementary Docs
- Upload a Supplementary Document

Note: Uploading a new Supplementary Document will not result in deleting a previously uploaded file.

Display Current Supplementary Docs

1. On the **Supplementary Document File Upload** screen (Figure 6), highlight the Supplementary Document you want to view in the list.
2. Click the **Display Current Supplementary Docs** button (Figure 6). The file displays in PDF format. If you need to download Adobe Reader, see Adobe Reader for FastLane.

Delete Current Supplementary Docs

1. On the **Supplementary Document File Upload** screen (Figure 6), highlight the Supplementary Document you want to delete in the list.
2. Click the **Delete Current Supplementary Docs** button (Figure 6). A screen displays asking you to confirm that you want to delete the file.
3. Click the **OK** button. The **Form Preparation** screen displays.

Upload a Supplementary Document

Follow the directions in Upload a File. Uploading a new file will not replace any previously uploaded files.

Enter a New Supplementary Document in the Text Box

If a Supplementary Document has already been uploaded and you want to write a new Supplementary Document in the text box, do the following:

1. On the **Supplementary Document File Upload** screen (Figure 6), click the **Delete Current Project Summary** button. A screen displays with a message for you to confirm that you want to delete the file.
2. Click the **OK** button. The **Supplementary Docs File Upload** screen displays (Figure 6).
3. Return to the **Form Preparation** screen.
4. Click the **Go** button next to Supplementary Docs. The **Supplementary Docs** screen displays with the text box. See Enter the Supplementary Document in the Text Box.

Add/Delete Non-Co-PI Senior Personnel for PI Transfer

1. Access the **Form Preparation** screen (Figure 1) (see Edit Transfer Request Forms Introduction).

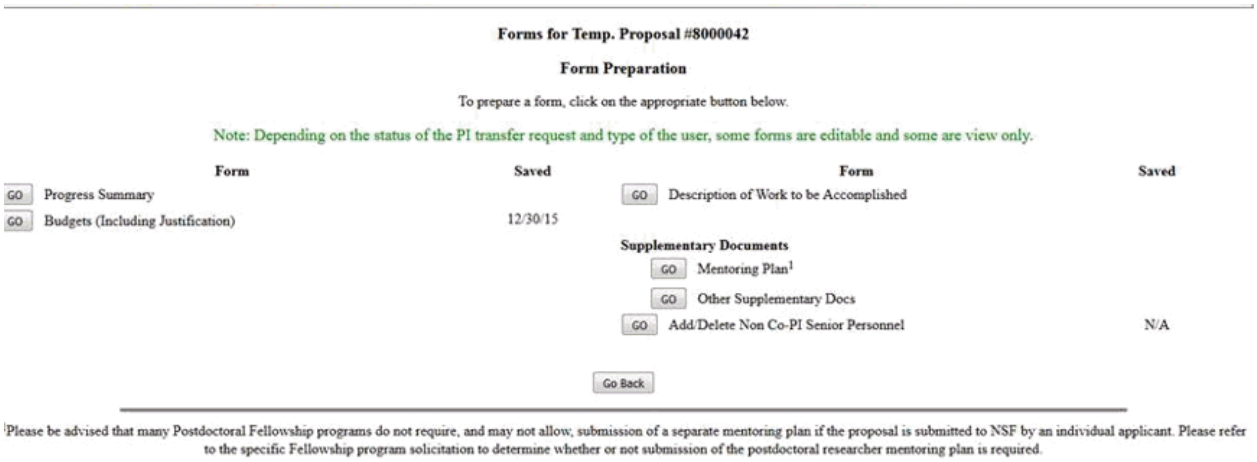


Figure 1 Form Preparation screen. The Go button for Add/Delete Non-Co-PI Senior Personnel is circled.

2. On the PI Transfer **Form Preparation** screen, click the **Go** button for Add/Delete Non-Co-PI Senior Personnel (Figure 1). The **Add/Delete Non Co-Principal Investigator (Co-PI) Senior Personnel Assigned to Proposal** screen displays (Figure 2).

Figure 2 Add/Delete Non-Co-Principal Investigator (Co-PI) Senior Personnel Assigned to the Proposal screen.

3. See Add/Delete Non-Co-PI Senior Personnel for instructions on how to add or delete non-Co-PI Senior Personnel.

Change PI/Add or Change Co-PI

What Is the Change PI and Add/Change Co-PI Request?

If your organization wants to continue an NSF grant project with a new PI or if you want to add or change Co-PIs, you must submit a Change PI and Add/Change Co-PI Request to NSF.

The new PI or Co-PIs must be registered with FastLane to gain NSF approval.

The request *must* contain the following:

- Biographical Sketch of the PI or Co-PI
- Current and Pending Support document detailing any current and pending financial support to the PI/Co-PI for this or other projects
- Justification for the change of PI or addition or change of Co-PIs

See Prepare a Change PI and Add/Change Co-PI Request for instructions for working on this request.

What Is the Change PI and Add/Change Co-PI Request?

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The request *must* contain the following:

- Biographical Sketch of the PI or Co-PI

- Current and Pending Support document detailing any current and pending financial support to the PI/Co-PI for this or other projects
- Justification for the change of PI or addition or change of Co-PIs

See Prepare a Change PI and Add/Change Co-PI Request for instructions for working on this request.

Prepare a Change PI Request

Prepare a Change PI and Add/Change Co-PI Request

1. Access the **Prepare a New Notification or Request** screen (Figure 1) (see Prepare a New Notification or Request as a PI or Prepare a New Notification or Request as an SPO).

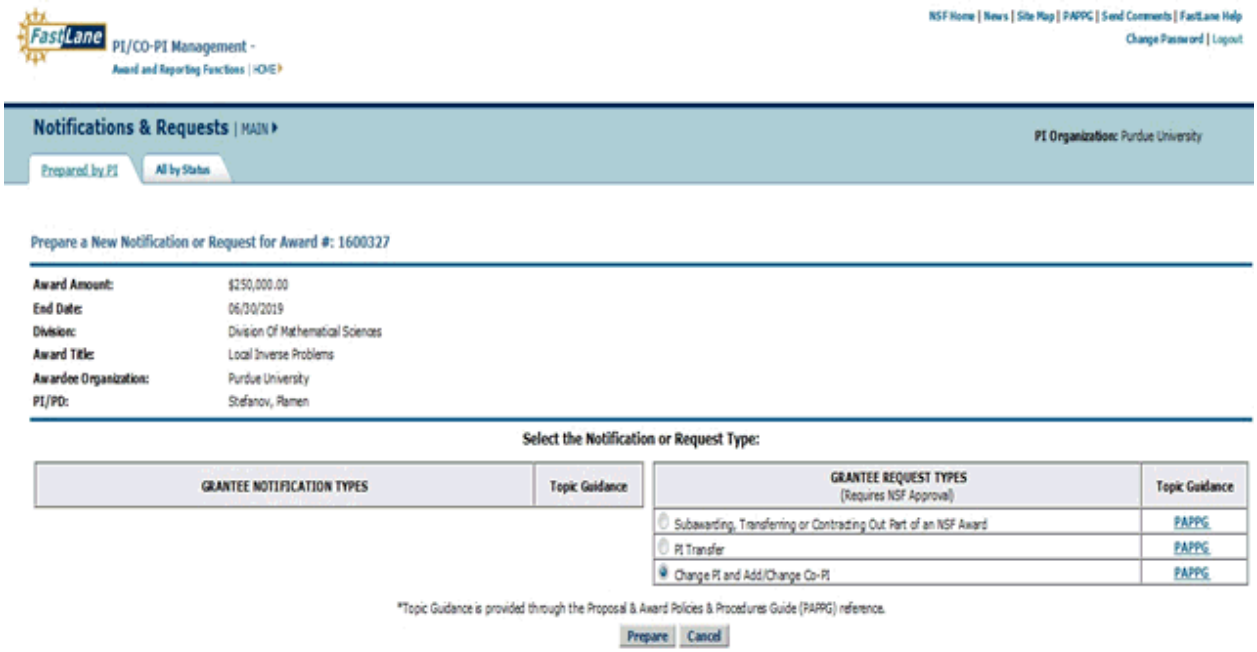


Figure 1 Prepare a New Notification or Request screen. Select The radio button for Change PI and Add/Change Co-PI and then the Prepare button.

2. On the **Prepare a New Notification or Request** screen (Figure 1), click the radio button for Change PI and Add/Change Co-PI in the **Grantee Request Types** list.
3. Click the **Prepare** button (Figure 1). The **Request for Change PI and Add/Change Co-PI** screen displays (Figure 2). You have these options on this screen:
   - Change the PI
   - Replace the PI with a Co-PI
   - Change the current Co-PIs

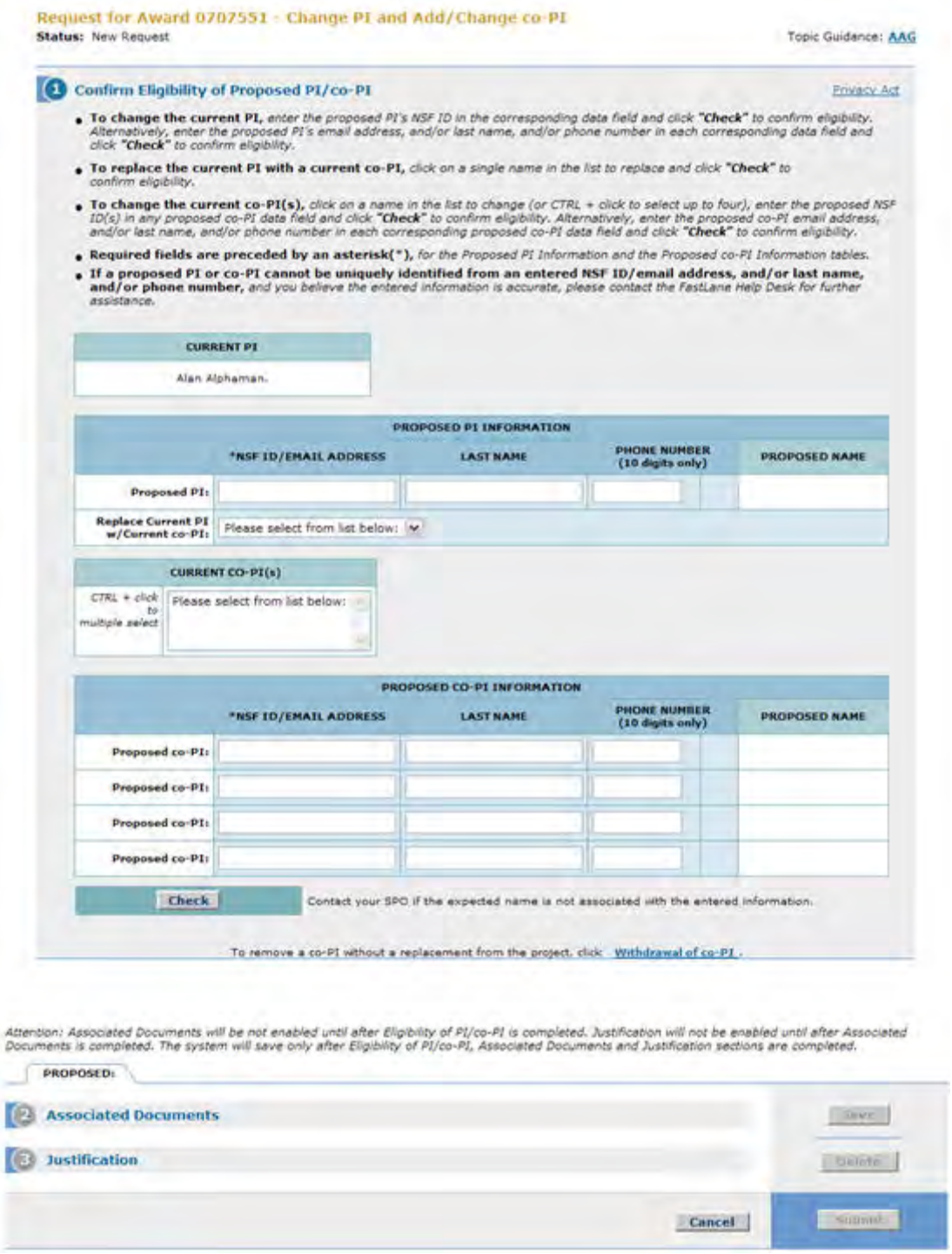


Figure 2 Request for Change PI and Add/Change Co-PI screen.

For any of these options, you must complete these steps in the following order:

1. Confirm the eligibility of the proposed PI or Co-PI
   Confirm the registration of the PI or Co-PI with NSF
2. Upload the Associated Documents

Upload the Biographical Sketch for the proposed PI or Co-PI and the document on Current and Pending Support

3. Type a Justification for the change of PI or addition/change of Co-PI
   (Click on a link above for instructions for that step.)

You must complete these steps for each individual you propose as a new PI or Co-PI.

Note: When you complete a step, the section for the next step is activated on the **Request for Change PI and Add/Change PI** screen (Figure 2).

When you have completed your work on the **Request for Change PI and Add/Change Co-PI Request** screen, click the **Save** button (Figure 3) to save the Change PI Request. The **View Request for Change PI and Add/Change Co-PI Request** screen displays (Figure 4).

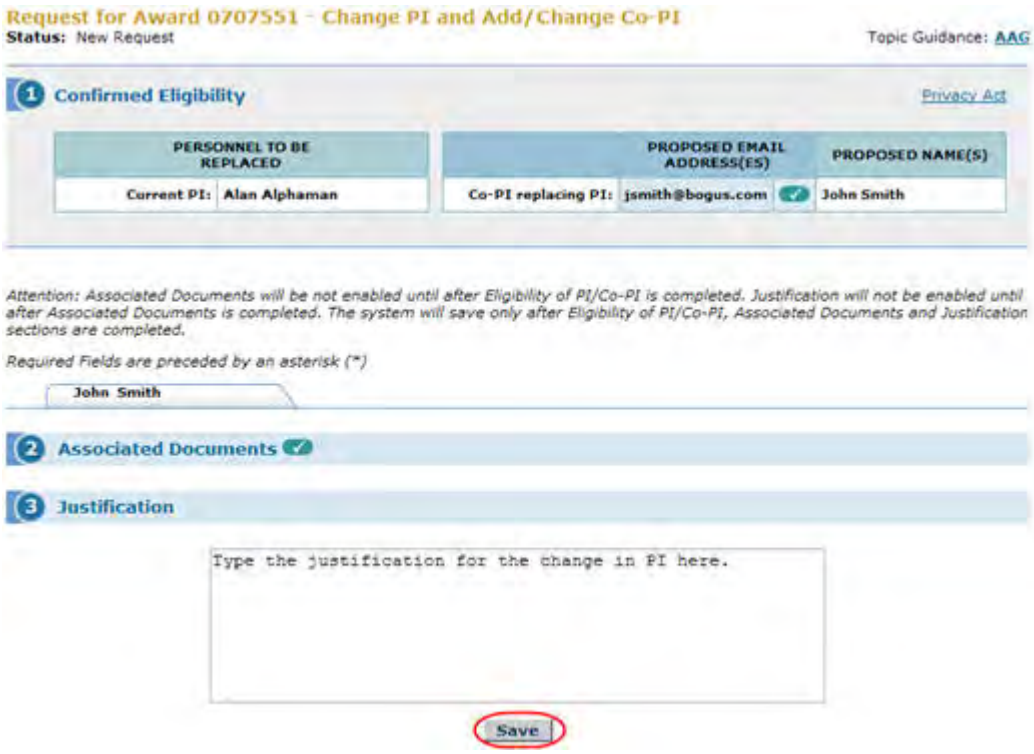


Figure 3 Request for Change PI and Add/Change Co-PI screen with the sections for Step 2, Associated Documents, and Step 3, Justification, activated. The Save button is circled.

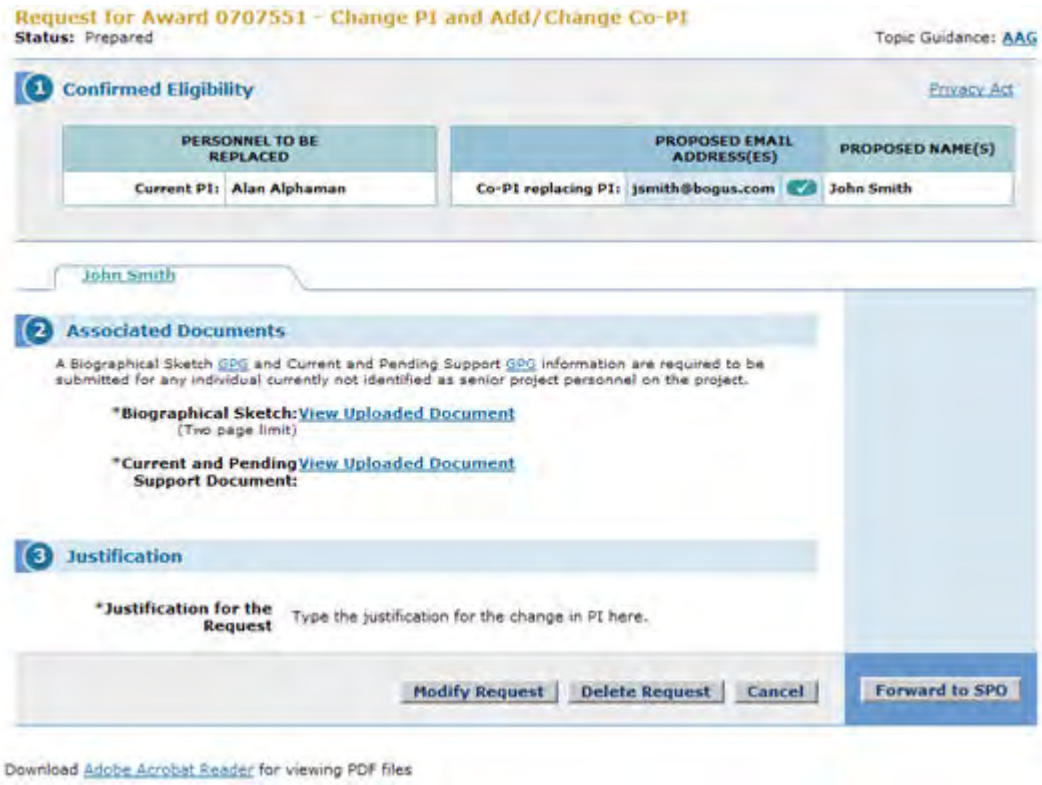


Figure 4 Request for Change PI and Add/Change Co-PI screen. The buttons for Modify Request, Delete Request, and Forward to SPO (if you are a PI) or Submit to NSF (if you are an SPO) are now activated.

On the **View Request for Change PI and Add/Change Co-PI** screen (Figure 4), the buttons for other functions are activated to give you these options:

- Modify the request
- Delete the request
- Forward the Request to the SPO (if you are a PI) or Submit the request to NSF (if you are an AOR)

(Click on a link above for instructions for that option.)

Prepare a Change PI and Add/Change Co-PI Request

1. Access the **Prepare a New Notification or Request** screen (Figure 1) (see Prepare a New Notification or Request as a PI or Prepare a New Notification or Request as an SPO).

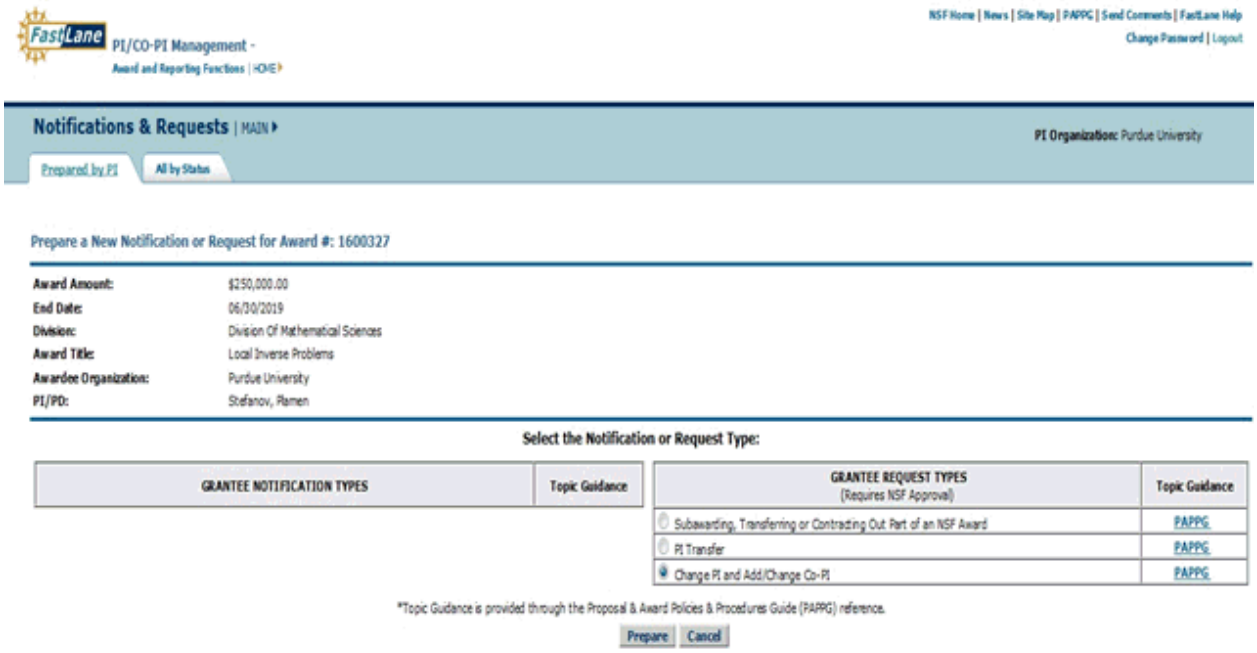


Figure 1 Prepare a New Notification or Request screen. Select The radio button for Change PI and Add/Change Co-PI and then the Prepare button.

2. On the **Prepare a New Notification or Request** screen (Figure 1), click the radio button for Change PI and Add/Change Co-PI in the **Grantee Request Types** list.
3. Click the **Prepare** button (Figure 1). The **Request for Change PI and Add/Change Co-PI** screen displays (Figure 2). You have these options on this screen:
   - Change the PI
   - Replace the PI with a Co-PI
   - Change the current Co-PIs

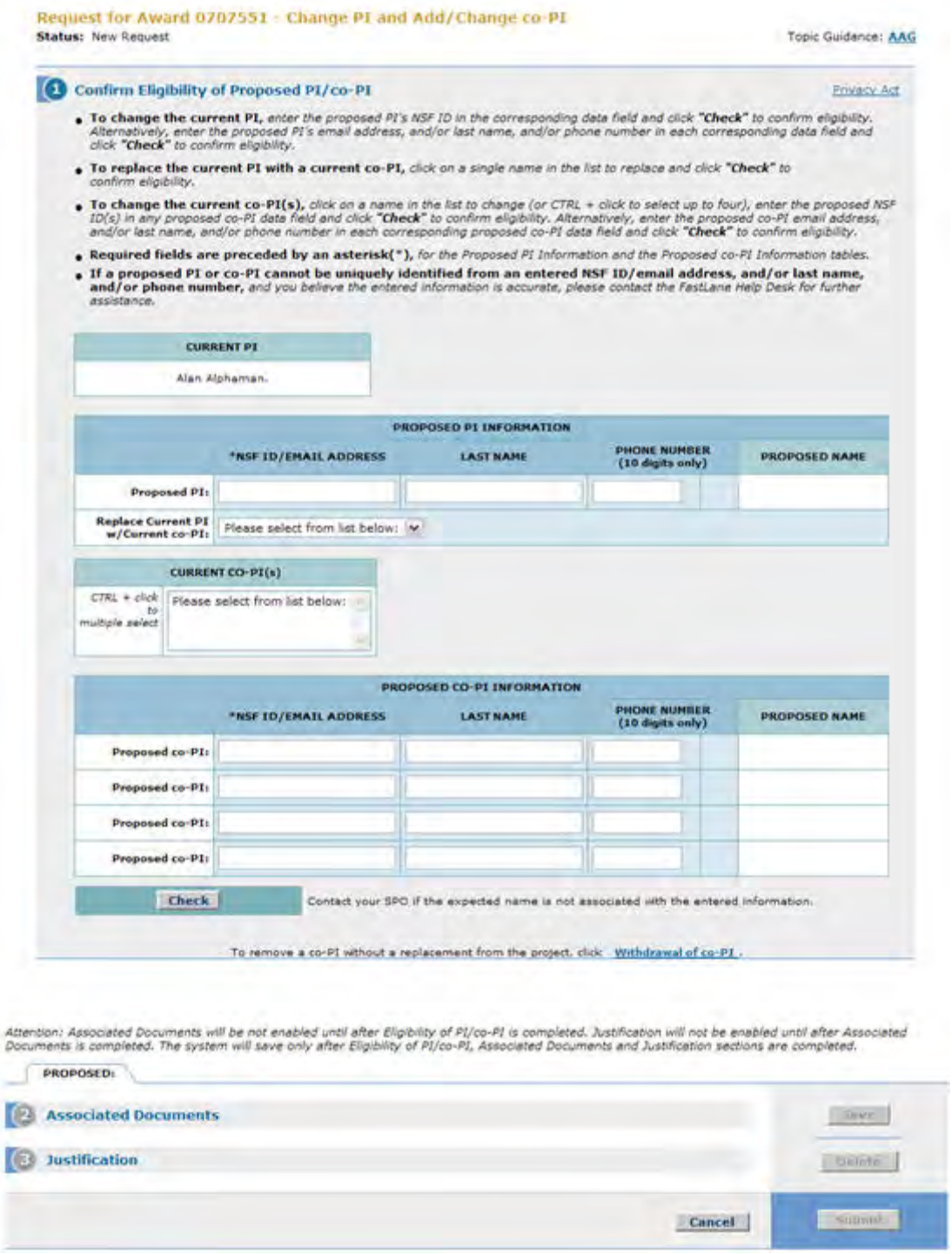


Figure 2 Request for Change PI and Add/Change Co-PI screen.

For any of these options, you must complete these steps in the following order:

1. Confirm the eligibility of the proposed PI or Co-PI
   Confirm the registration of the PI or Co-PI with NSF
2. Upload the Associated Documents

Upload the Biographical Sketch for the proposed PI or Co-PI and the document on Current and Pending Support

3. Type a Justification for the change of PI or addition/change of Co-PI
   (Click on a link above for instructions for that step.)

You must complete these steps for each individual you propose as a new PI or Co-PI.

Note: When you complete a step, the section for the next step is activated on the **Request for Change PI and Add/Change PI** screen (Figure 2).

When you have completed your work on the **Request for Change PI and Add/Change Co-PI Request** screen, click the **Save** button (Figure 3) to save the Change PI Request. The **View Request for Change PI and Add/Change Co-PI Request** screen displays (Figure 4).

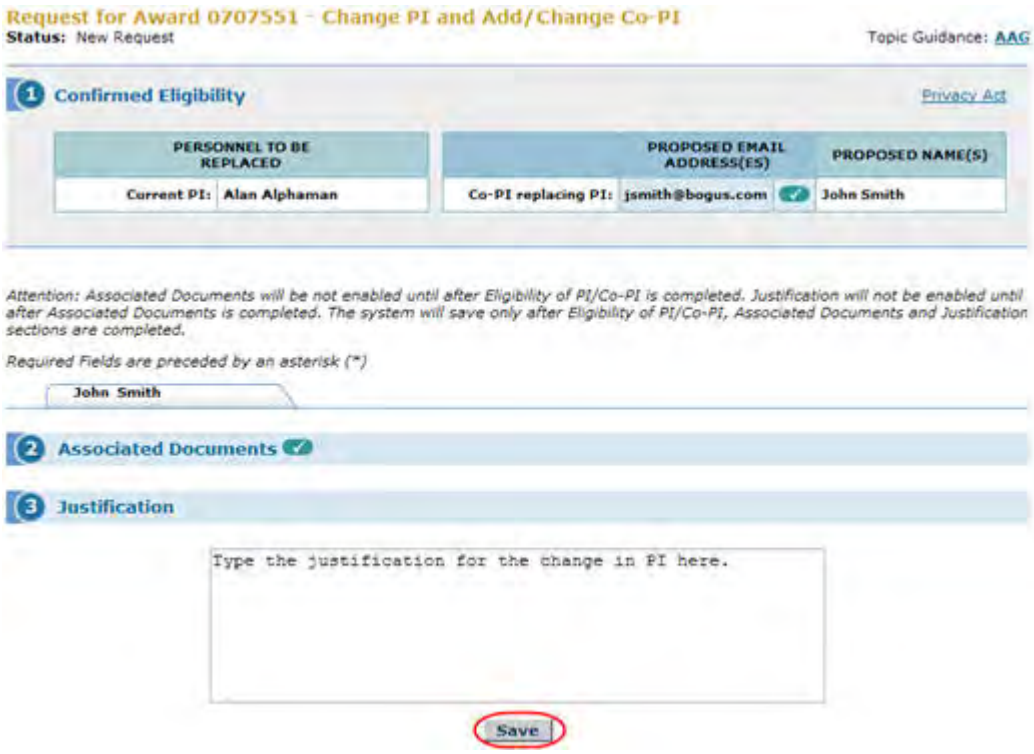


Figure 3 Request for Change PI and Add/Change Co-PI screen with the sections for Step 2, Associated Documents, and Step 3, Justification, activated. The Save button is circled.

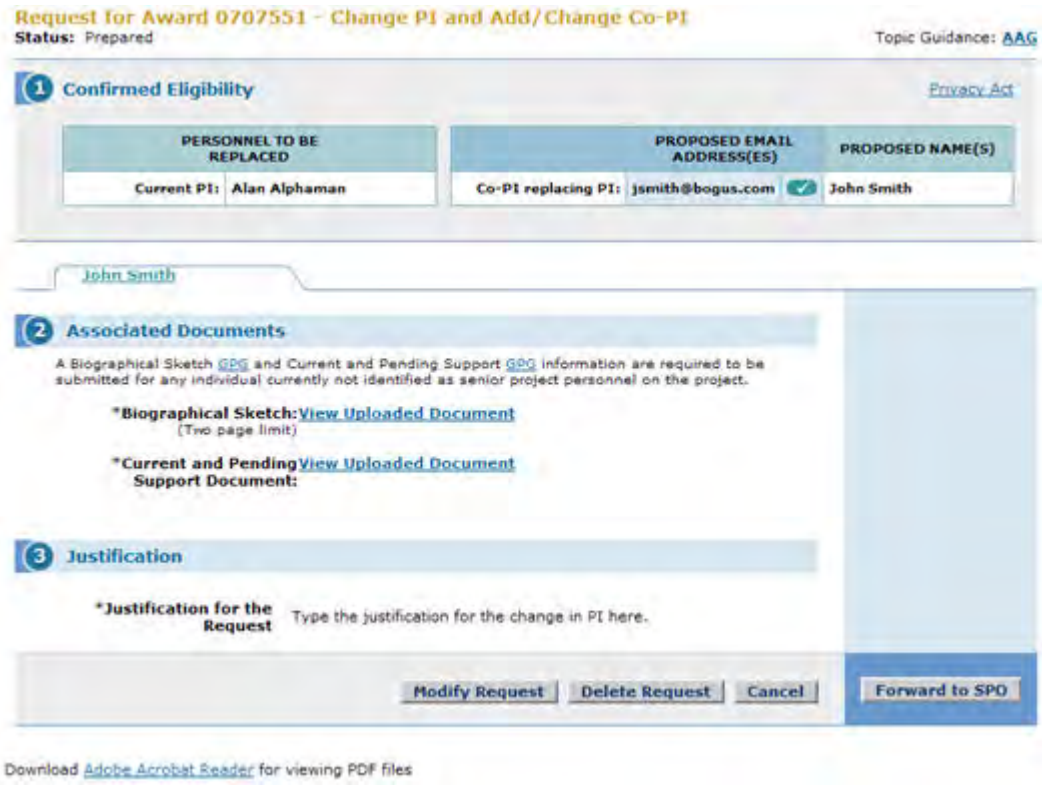


Figure 4 Request for Change PI and Add/Change Co-PI screen. The buttons for Modify Request, Delete Request, and Forward to SPO (if you are a PI) or Submit to NSF (if you are an SPO) are now activated.

On the **View Request for Change PI and Add/Change Co-PI** screen (Figure 4), the buttons for other functions are activated to give you these options:

- Modify the request
- Delete the request
- Forward the Request to the SPO (if you are a PI) or Submit the request to NSF (if you are an AOR)

(Click on a link above for instructions for that option.)

Step 1 Confirm the Eligibility of the Proposed PI/Co-PI

Access the **Request for Change PI and Add/Change Co-PI** screen (Figure 1) (see Prepare a Change PI and Add/Change Co-PI Request). The screen gives you the options to:

- Change the PI
- Replace the PI with a current Co-PI
- Change the current Co-PI

(Click on a link above for instructions for that option.)

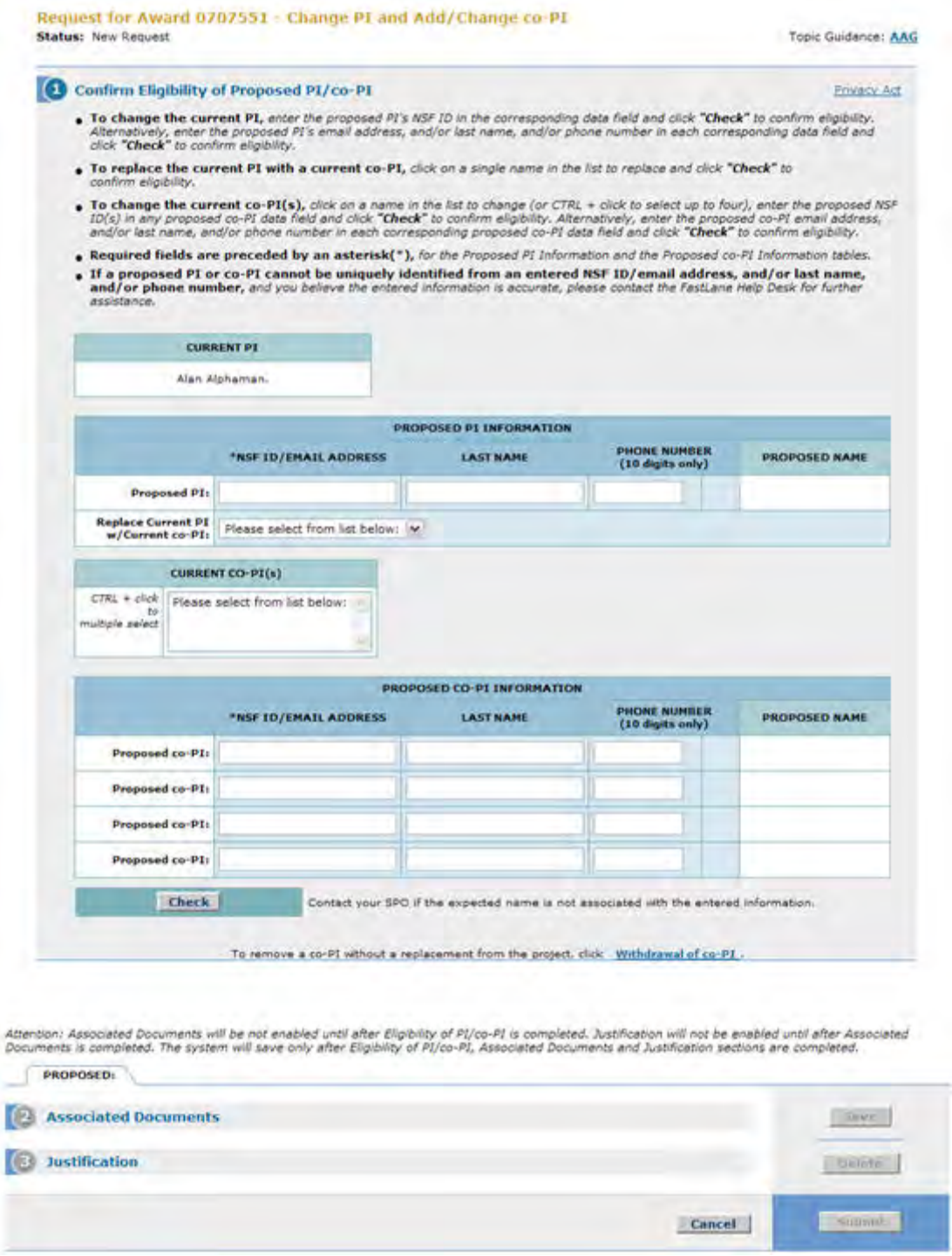


Figure 1 Confirm Eligibility of Proposed PI/Co-PI section of the Change PI and Add/Change Co-PI screen.

Change the PI

1. On the **Request for Change PI and Add/Change Co-PI** screen (Figure 2), in the **Proposed PI** box or **Proposed Co-PI** box, enter the NSF ID or alternatively, enter the

proposed PI's email address, and/or last name, and/or phone number in each corresponding data field for the new PI or Co-PI you want to propose.

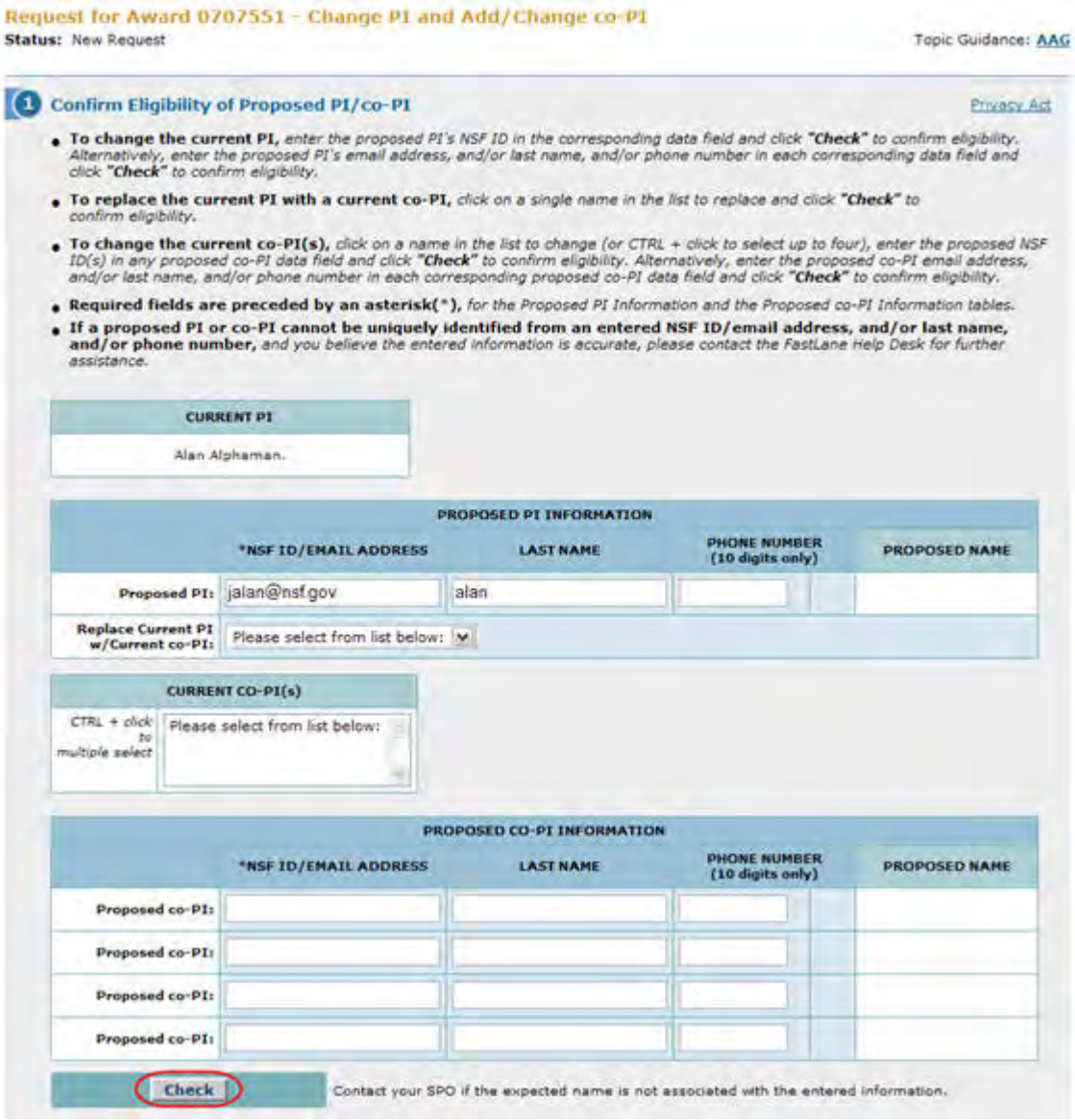


Figure 2 Confirm Eligibility of Proposed PI/Co-PI section of the Change PI and Add/Change Co-PI screen. The Check button is circled.

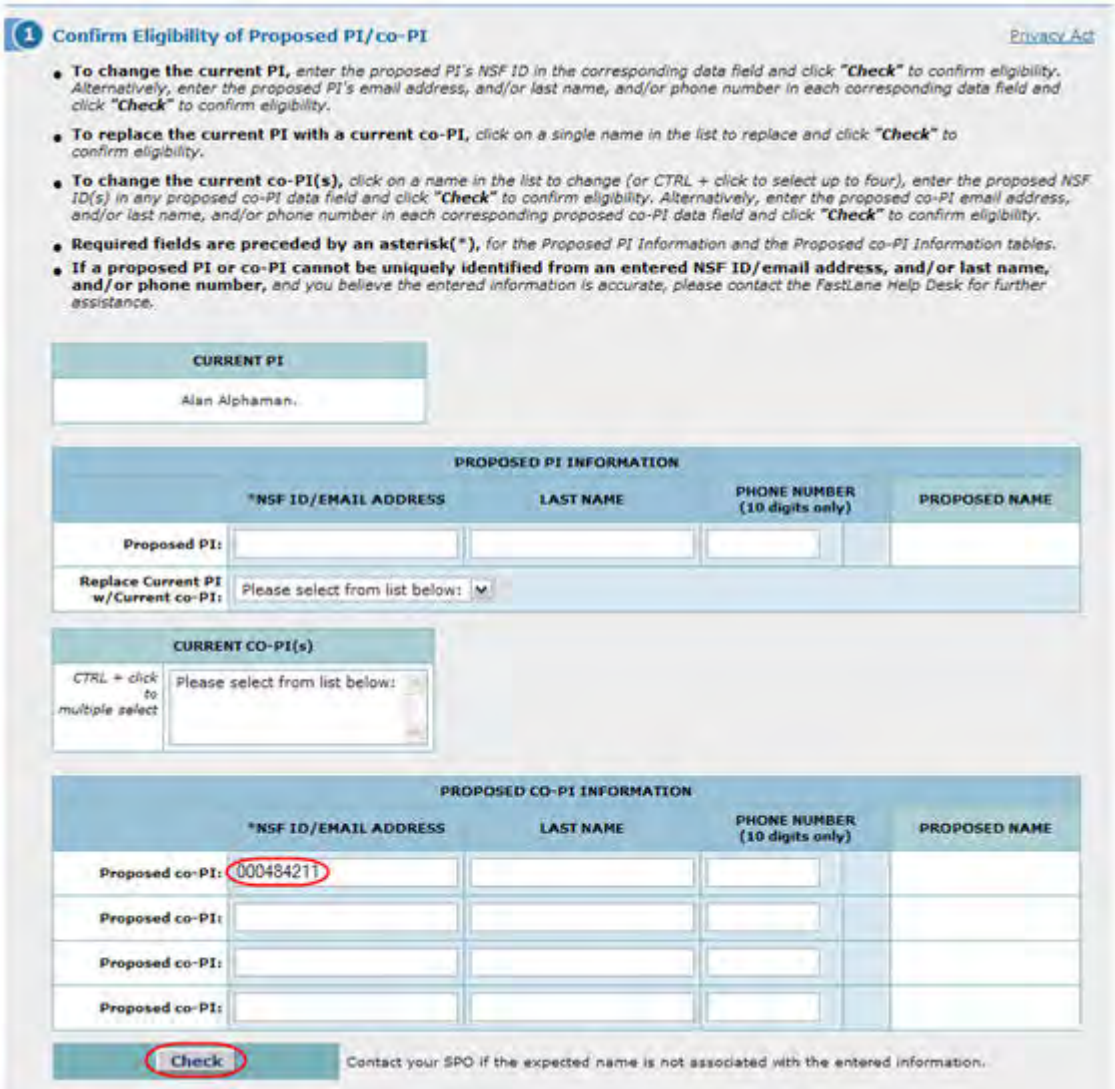
2. Click the **Check** button (Figure 2). FastLane checks to see if the PI's NSF ID or email address, and/or last name, and/or phone number is registered with NSF. If any of those data elements are registered, a check mark and the name of the PI display in the fields next to the search criteria (Figure 3). Proceed to **Step 2, Associated Documents** (see Step 2 Associated Documents for instructions).

Figure 3 Confirm Eligibility of Proposed PI/Co-PI section of the Request for Change PI and Add/Change Co-PI screen. A check mark and the name of the new PI display. This signifies that the proposed PI is eligible.

Note: Once you have completed Step 1, **Step 2 Associated Documents** is activated on the **Request for Change PI and Add/Change Co-PI** screen.

Change the Current Co-PIs

1. On the **Request for Change PI and Add/Change Co-PI** screen (Figure 4), in the **Proposed PI** box or **Proposed Co-PI** box, enter the NSF ID or alternatively, enter the proposed PI's email address, and/or last name, and/or phone number in each corresponding data field for the new PI or Co-PI you want to propose.



1 Confirm Eligibility of Proposed PI/co-PI

Privacy Act

- **To change the current PI,** *enter the proposed PI's NSF ID in the corresponding data field and click* ***"Check"*** *to confirm eligibility. Alternatively, enter the proposed PI's email address, and/or last name, and/or phone number in each corresponding data field and click* ***"Check"*** *to confirm eligibility.*
- **To replace the current PI with a current co-PI,** *click on a single name in the list to replace and click* ***"Check"*** *to confirm eligibility.*
- **To change the current co-PI(s),** *click on a name in the list to change (or CTRL + click to select up to four), enter the proposed NSF ID(s) in any proposed co-PI data field and click* ***"Check"*** *to confirm eligibility. Alternatively, enter the proposed co-PI email address, and/or last name, and/or phone number in each corresponding proposed co-PI data field and click* ***"Check"*** *to confirm eligibility.*
- **Required fields are preceded by an asterisk(*),** *for the Proposed PI Information and the Proposed co-PI Information tables.*
- **If a proposed PI or co-PI cannot be uniquely identified from an entered NSF ID/email address, and/or last name, and/or phone number,** *and you believe the entered information is accurate, please contact the FastLane Help Desk for further assistance.*

CURRENT PI
Alan Alphaman.

PROPOSED PI INFORMATION				
	*NSF ID/EMAIL ADDRESS	LAST NAME	PHONE NUMBER (10 digits only)	PROPOSED NAME
Proposed PI:				
Replace Current PI w/Current co-PI:	Please select from list below:			

CURRENT CO-PI(s)	
CTRL + click to multiple select	Please select from list below:

PROPOSED CO-PI INFORMATION				
	*NSF ID/EMAIL ADDRESS	LAST NAME	PHONE NUMBER (10 digits only)	PROPOSED NAME
Proposed co-PI:	000484211			
Proposed co-PI:				
Proposed co-PI:				
Proposed co-PI:				

Check

Contact your SPO if the expected name is not associated with the entered information.

Figure 4 Confirm Eligibility of Proposed PI/Co-PI section of the Change PI and Add/Change Co-PI screen. The NSF ID/Email Address box and the Check button are circled.

2. Click the **Check** button (Figure 4). The **Request for Award Change PI and Add/Change Co-PI** screen displays again. If the PI's NSF ID or email address, and/or last name, and/or phone number is registered with NSF, a check mark and the name of the PI display in the fields next to the search criteria (Figure 5). Proceed to **Step 2, Associated Documents** (see Step 2 Associated Documents for instructions).

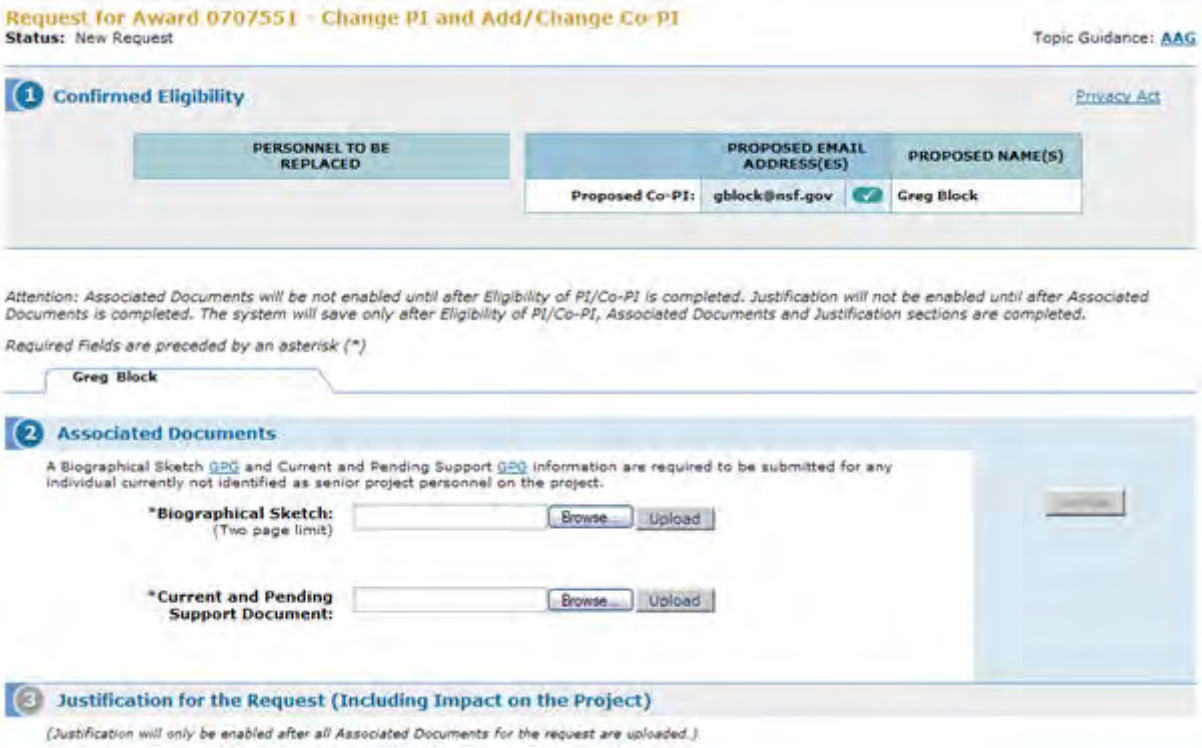


Figure 5 Request for Change PI and Add/Change Co-PI screen. A check mark and the name of the new PI display in the boxes next to the search criteria you typed. This signifies that the proposed PI is eligible.

Note: Once you have completed Step 1, **Step 2 Associated Documents** is activated on the **Request for Change PI and Add/Change Co-PI** screen.

Replace the PI with a Current Co-PI

1. On the **Request for Change PI and Add/Change Co-PI** screen (Figure 6), in the Replace Current PI w/Current Co-PI drop-down list, highlight a name of a Co-PI.

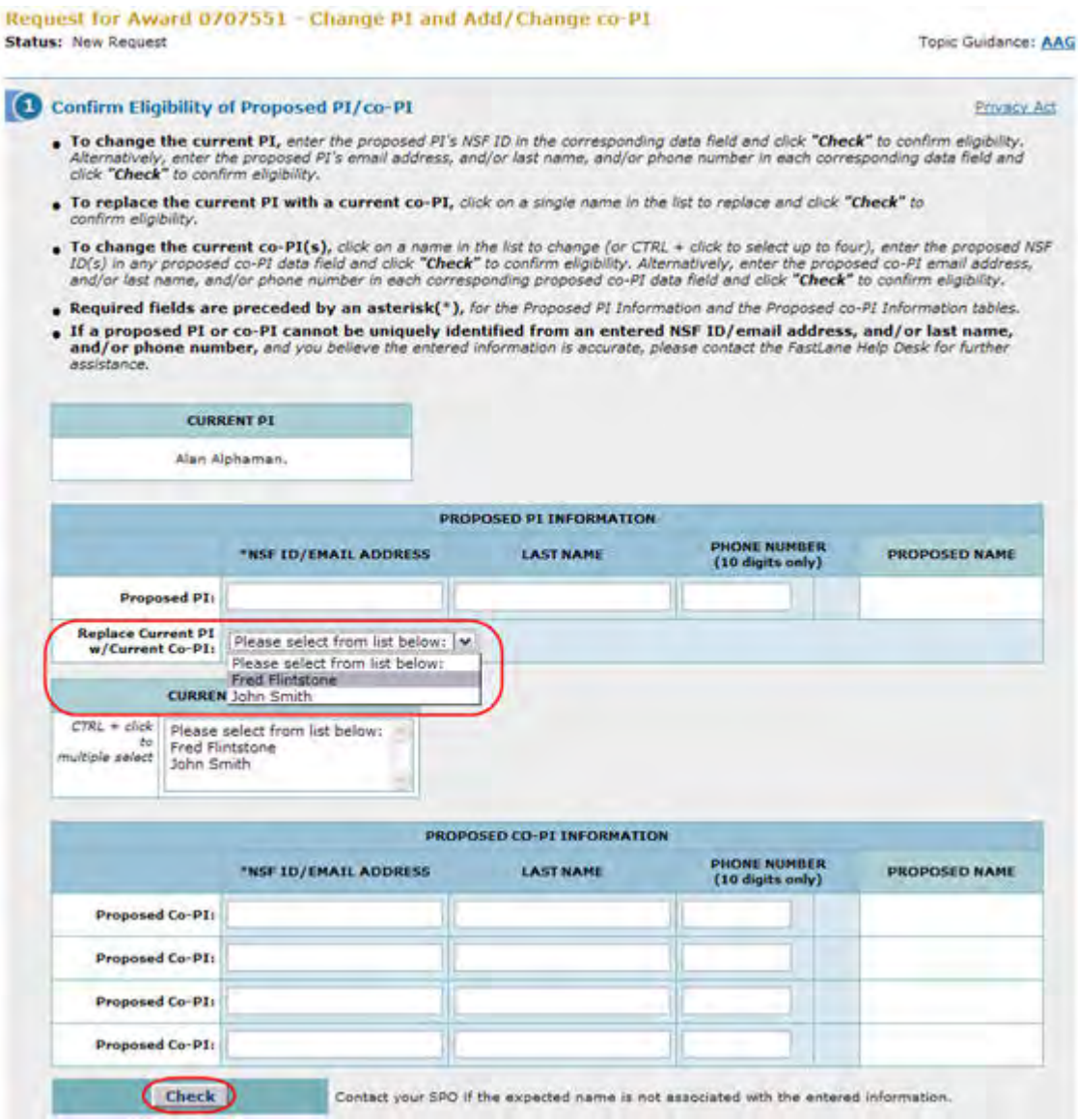


Figure 6 Confirm Eligibility of Proposed PI/Co-PI section of the Change PI and Add/Change Co-PI screen. The drop-down list of current Co-PIs and the Check button are circled.

2. Click the Check button (Figure 6). The **Request for Award Change PI and Add/Change Co-PI** screen displays again. If the PI's NSF ID or email address, and/or last name, and/or phone number is registered with NSF, a check mark and the name of the PI display in the Co-PI Replacing PI section (Figure 7). Proceed to **Step 2, Associated Documents** (see Step 2 Associated Documents for instructions).

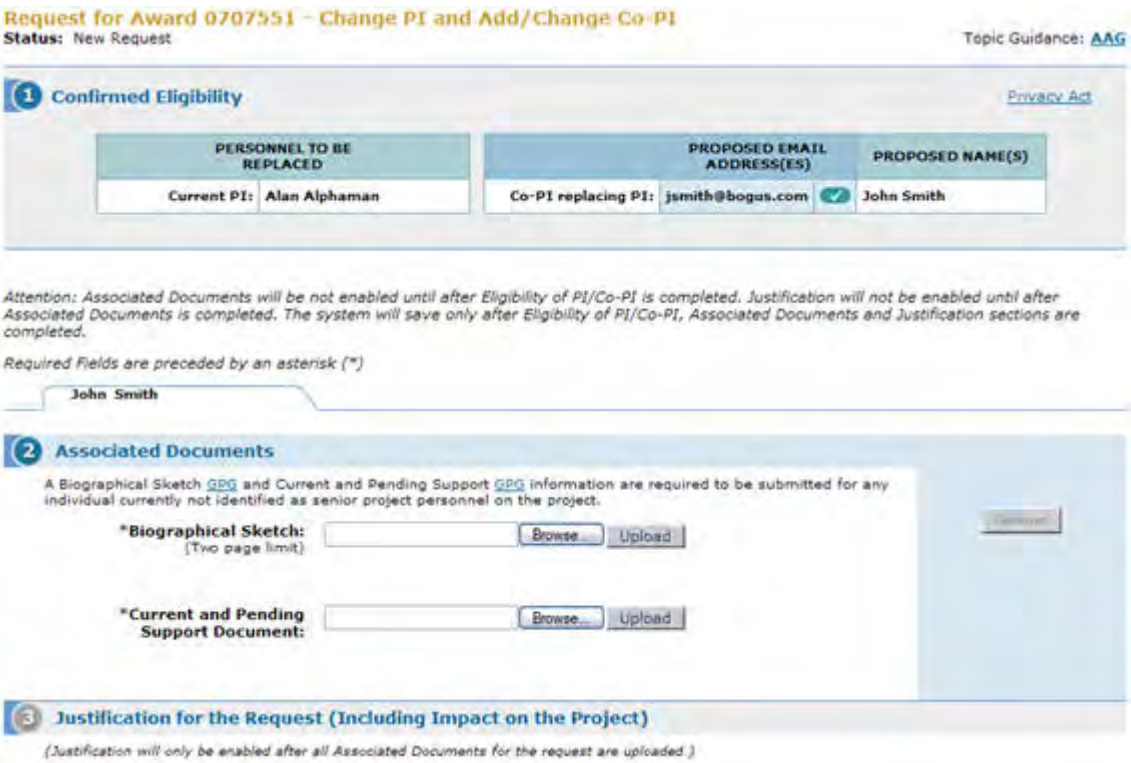


Figure 7 Request for Change PI and Add/Change Co-PI screen.

Step 2 Upload the Associated Documents

1. Access the **Request for Change PI and Add/Change Co-PI** screen (see Step 1 Confirm the Eligibility of the Proposed PI/Co-PI). As soon as you have confirmed the eligibility of the PI or Co-PI in Step 1, the **Associated Documents** section of the **Request for Change PI and Add/Change Co-PI** screen activates (Figure 1).

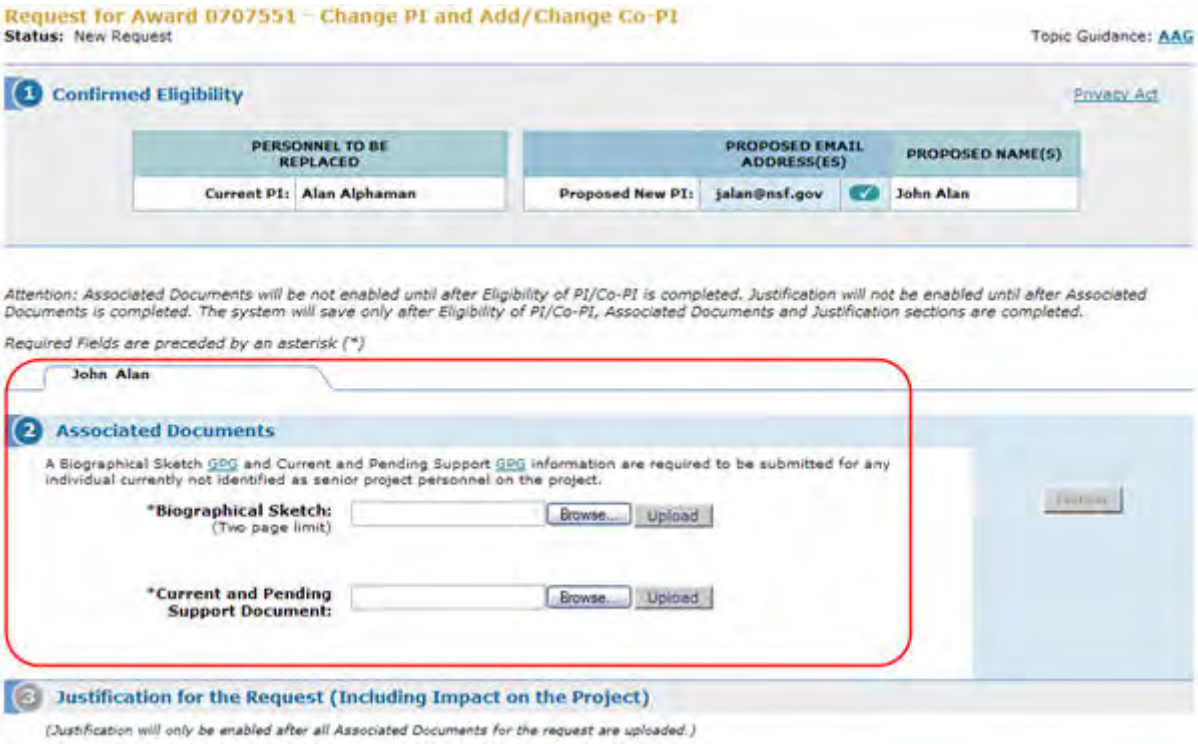


Figure 1 Request for Change PI and Add/Change Co-PI screen. The section for Step 2 Associated Documents is circled.

2. In the **Associated Documents** section (Figure 1), upload a Biographical Sketch (see What Is a Biographical Sketch? and a Current and Pending Support document (see What Is Current and Pending Support?) for the PI you propose.
3. See Upload a File for instructions on how to upload a file to FastLane.
4. When you are finished uploading the associated documents, click the **Continue** button (Figure 2). Step 3 Justification is now activated on the **Request for Change PI and Add/Change PI/Co-PI** screen, and you can work on the Justification.

Figure 2 Request for Change PI and Add/Change PI/Co-PI screen after the associated documents have been uploaded. The Continue button is circled.

View and Delete Associated Documents

Once you have accepted an upload, in the **Associated Documents** section, a **View** button and **Delete** button display that give you these options:

- View the uploaded document
- Delete the uploaded document

View the Uploaded Document

In the **Associated Documents** section of the **Request for Change PI and Add/Change Co-PI** screen (Figure 3), click the **View** button next to the file you want to view. The document displays in PDF format. If you need to download Adobe Acrobat, click **Download Adobe Acrobat Reader** at the bottom of the screen (Figure 4).

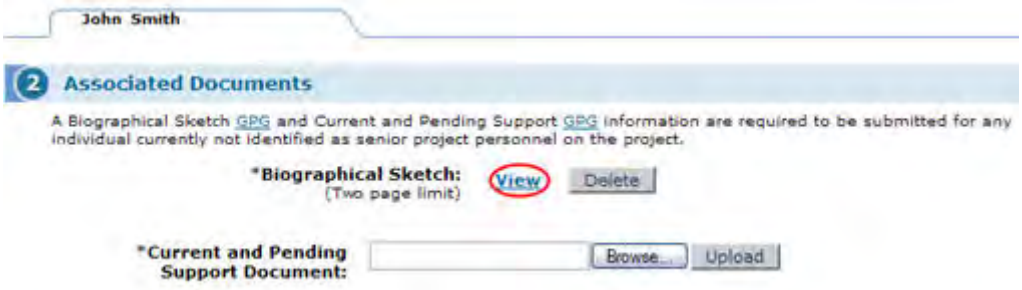


Figure 3 Associated Documents section of the Request for Change PI and Add/Change Co-PI screen. The View button is circled.

Figure 4 Lower portion of the Request for Change PI and Add/Change Co-PI screen. The Adobe Acrobat Reader link is circled.

Delete the Uploaded Document

In the **Associated Documents** section of the **Request for Change PI and Add/Change Co-PI** screen (Figure 5), click the **Delete** button next to the document you want to delete. The document is deleted, and the **Browse** and **Upload** buttons display as they did before you uploaded the file.

Figure 5 Associated Documents section of the Request for Change PI and Add/Change Co-PI screen. The Delete button is circled.

Step 3 Justification

1. Access the **Change PI and Add/Change Co-PI** screen (Figure 1) (see Step 2 Upload the Associated Documents). As soon as you have accepted the uploaded files for Associated Documents, the **Justification** box displays on the **Request for Change PI and Add/Change Co-PI** screen (Figure 1).

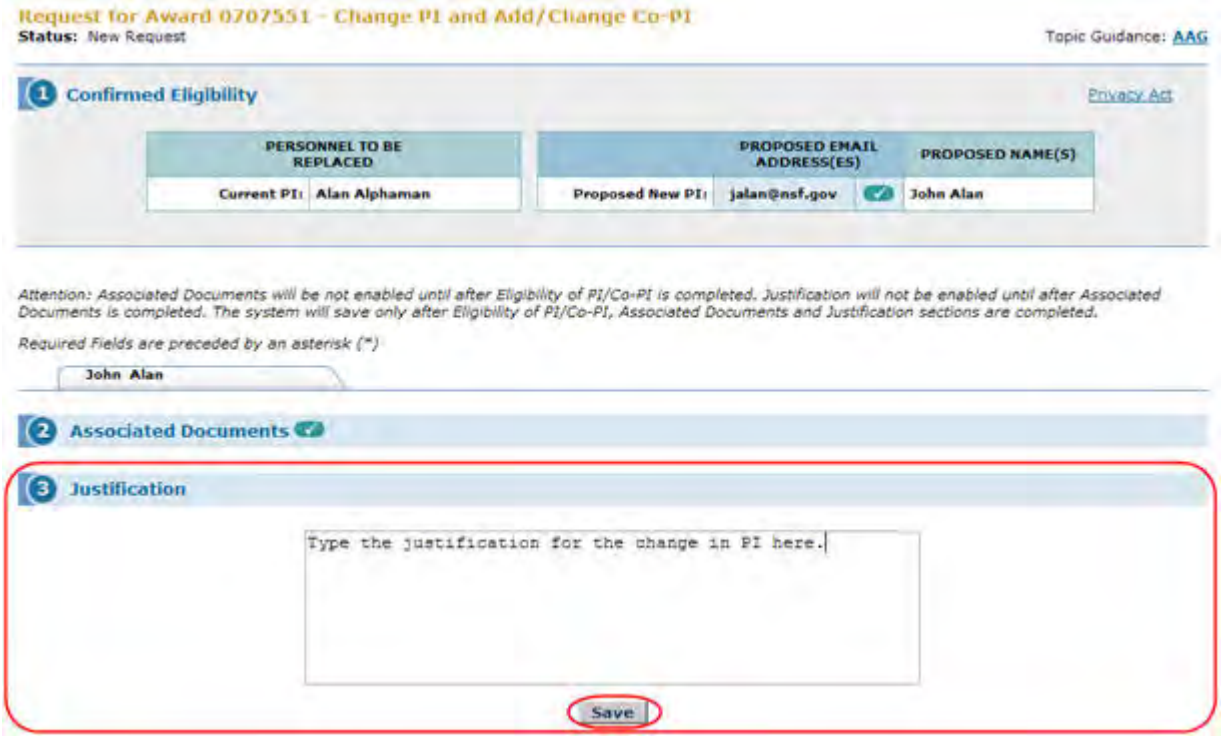


Figure 1 Request for Change PI and Add/Change Co-PI screen. The Justification section and the Save button are circled.

2. In the **Justification** box (Figure 1), type or copy and paste a Justification for the change of PI or Co-PI.
3. Click the **Save** button (Figure 1) to save the Justification and to save your Change PI Request. The **View Request for Change PI and Add/Change Co-PI** screen displays (Figure 2), and the buttons for these functions are activated:
   - Modify the request
   - Delete the request
   - Forward the Request to the SPO (if you are a PI)
   - Submit the request to NSF (if you are an AOR)

   (Click on a link above for instructions for that option.)

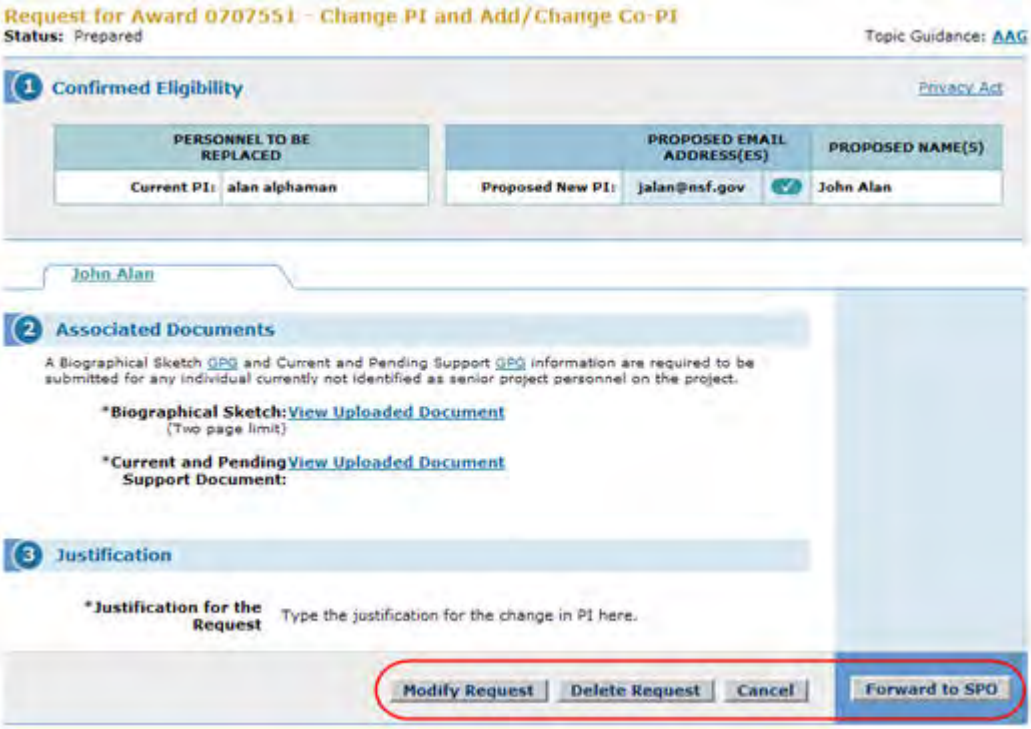


Figure 2 Request for Change PI and Add/Change Co-PI screen. The buttons to Modify Request, Delete Request, Cancel, and Forward to SPO (if you are a PI) or Submit to NSF (if you are an AOR) are circled.

Modify a Change PI and Add/Change Co-PI Request

1. Access the **View Request for Change PI and Add/Change Co-PI** screen (Figure 1). See one of the following:
   - Step 3 Justification
   - View a Notification or Request Prepared by the PI
   - View a Notification or Request Prepared by the SPO

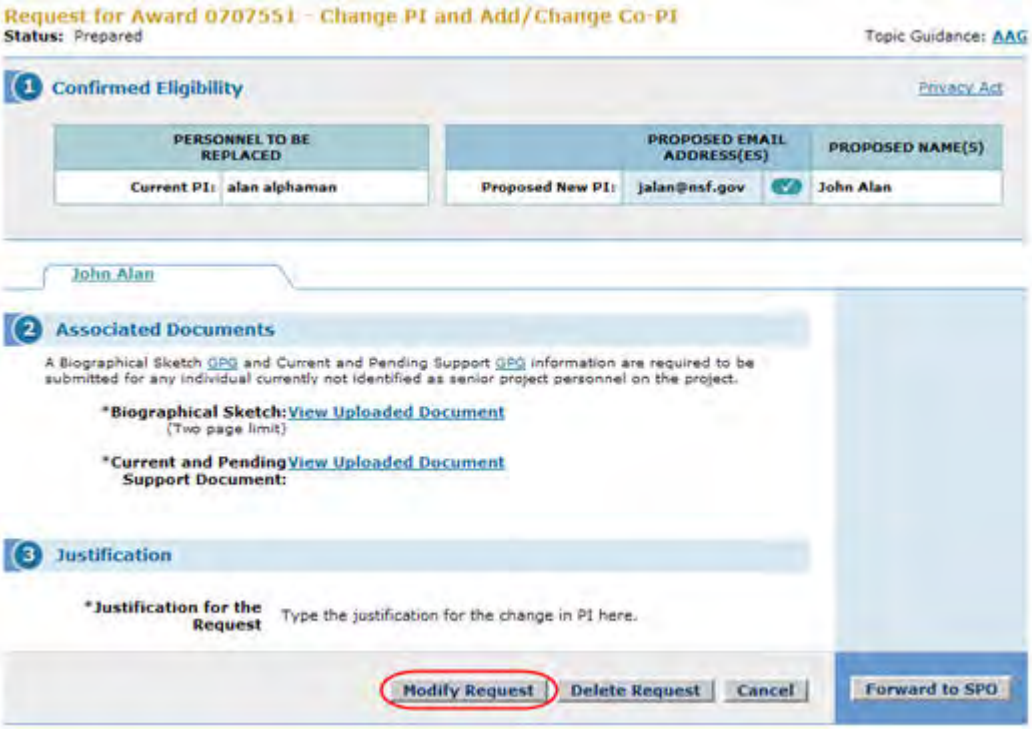


Figure 1 Request for Change PI and Add/Change Co-PI screen. The Modify Request button is circled.

2. Click the **Modify Request** button (Figure 1). The **Request for Change PI and Add/Change Co-PI** screen displays (Figure 2) with only the section for **Step 1, Confirm Eligibility of Proposed PI/Co-PI**, activated.

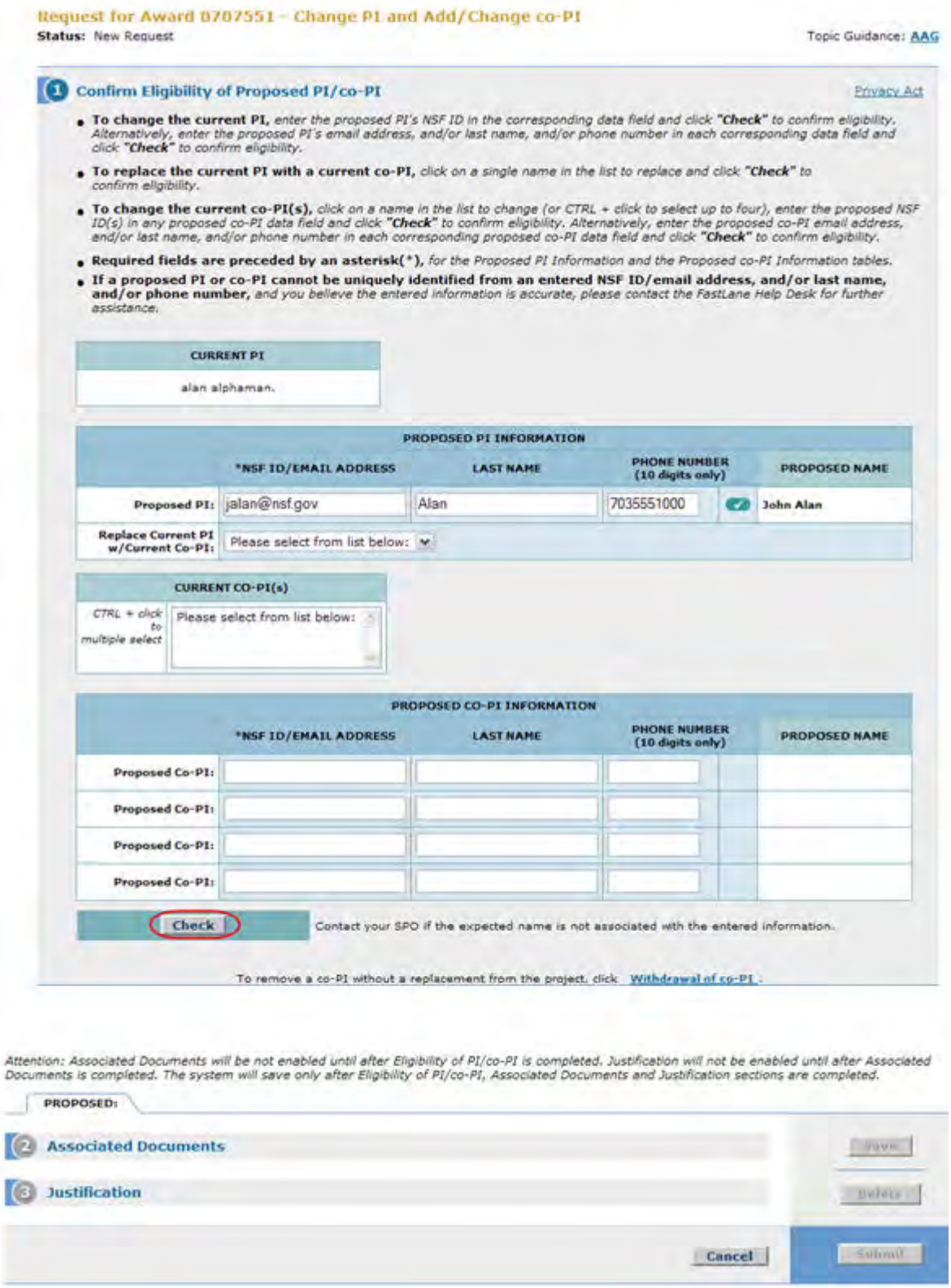


Figure 2 Request for Change PI and Add/Change Co-PI screen. The Check button is circled.

3. Make any changes to this section that you require (see Step 1, Confirm Eligibility of the Proposed PI/Co-PI).
4. Click the **Continue** button (Figure 2). Step 2 is activated on the **Request for Change PI and Add/Change Co-PI** screen (Figure 3).

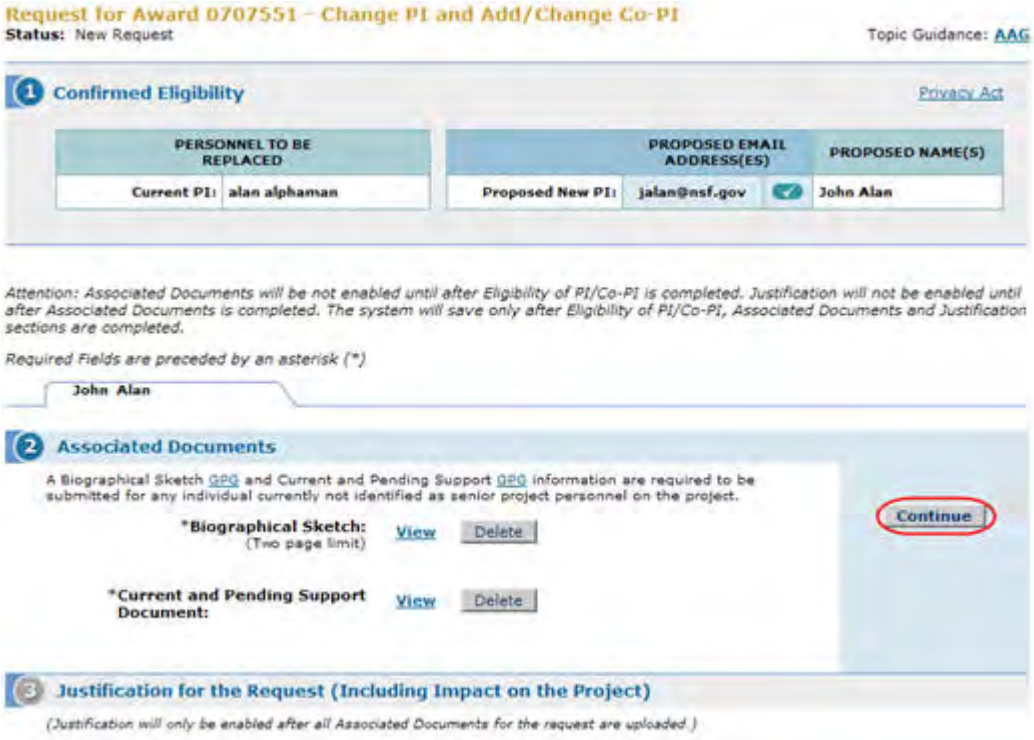


Figure 3 Request for Change PI and Add/Change PI/Co-PI screen. Step 2 is now activated. The Continue button is circled.

5. In the **Step 2, Associated Documents** section (Figure 3), to change an uploaded file, click the **Delete** button to delete the uploaded file. Then upload a new file to replace it. See Step 2, Upload Associated Documents and Upload a File for instructions.
6. Click the Continue button. Step 3 is activated on the **Request for Change PI and Add/Change Co-PI** screen (Figure 4).

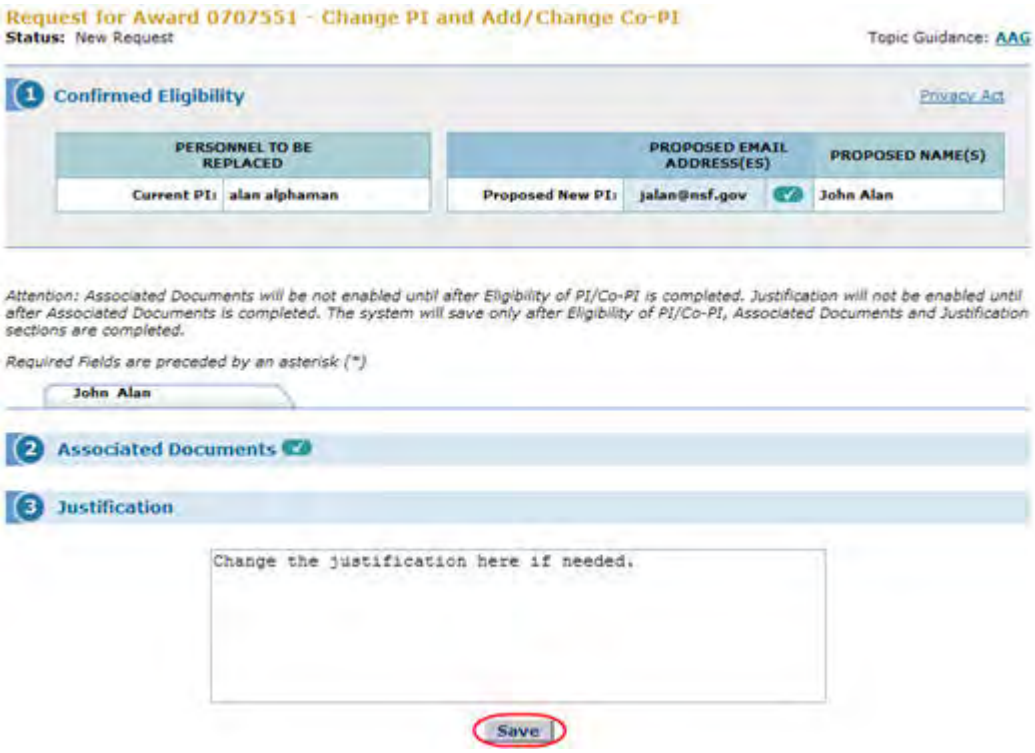


Figure 4 Request for Change PI and Add/Change Co-PI screen. Step 3 Justification is activated. The Save button is circled.

7. In the **Step 3, Justification** section (Figure 4), edit or replace the Justification as you require. See Step 3 Justification for instructions.
8. Click the **Save** button (Figure 4) to save the modified request. The **Request for Change and Add/Change Co-PI** screen displays (Figure 5) with the buttons activated to **Modify Request, Delete Request,** and **Submit to NSF** (if you are an SPO) or **Forward to SPO** (if you are a PI).

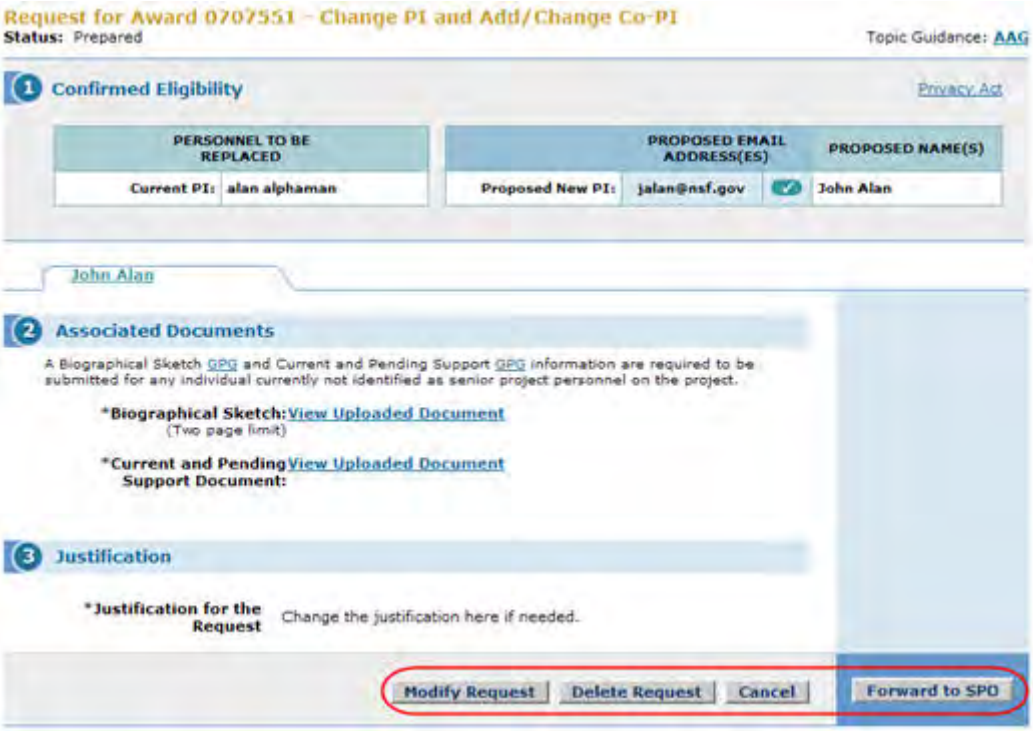


Figure 5 Request for Change PI and Add/Change Co-PI screen. The buttons to Modify Request, Delete Request, Cancel, and Forward to SPO (if you are a PI) or Submit to NSF (if you are an SPO) are circled.

Forward a Change PI and Add/Change Co-PI Request to the SPO

Only a PI may forward a Change PI and Add/Change Co-PI Request to the SPO.

1. Access the **View Request for Change PI and Add/Change Co-PI** screen (Figure 1) (see Step 3 Justification or View a Notification or Request Prepared by the PI).

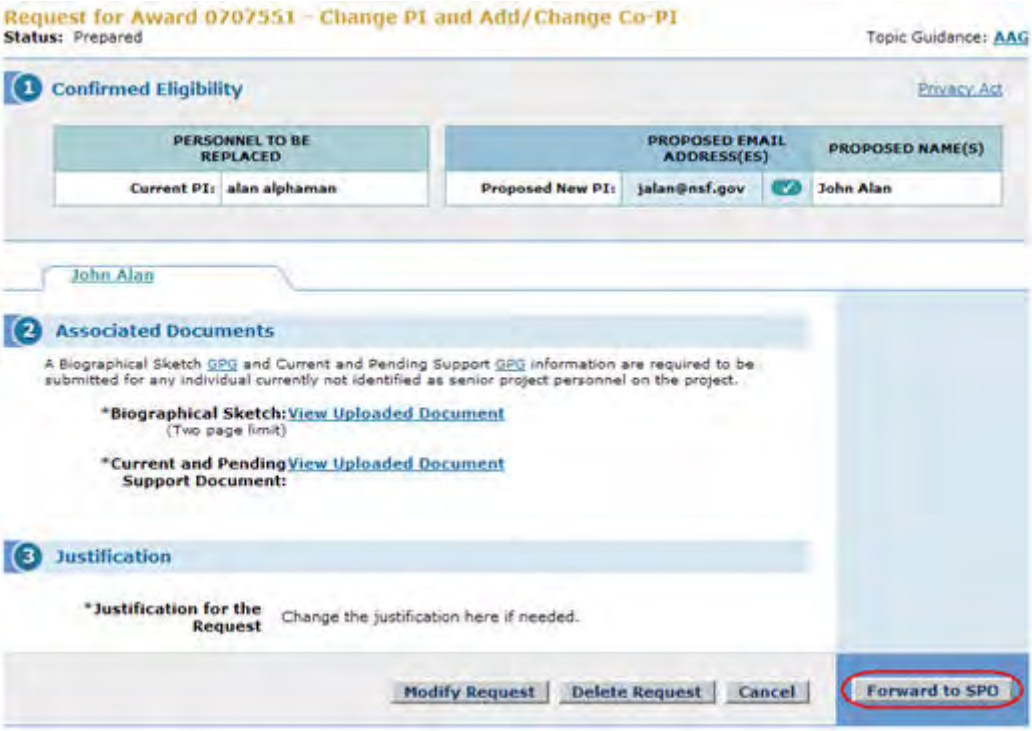


Figure 1 Request for Change PI and Add/Change Co-PI screen. The Forward to SPO button is circled.

2. Click the **Forward to SPO** button (Figure 1). The **Forward Notification for Add/Change PI** screen displays (Figure 2) with a message for you to confirm that you want to forward the request to the SPO.

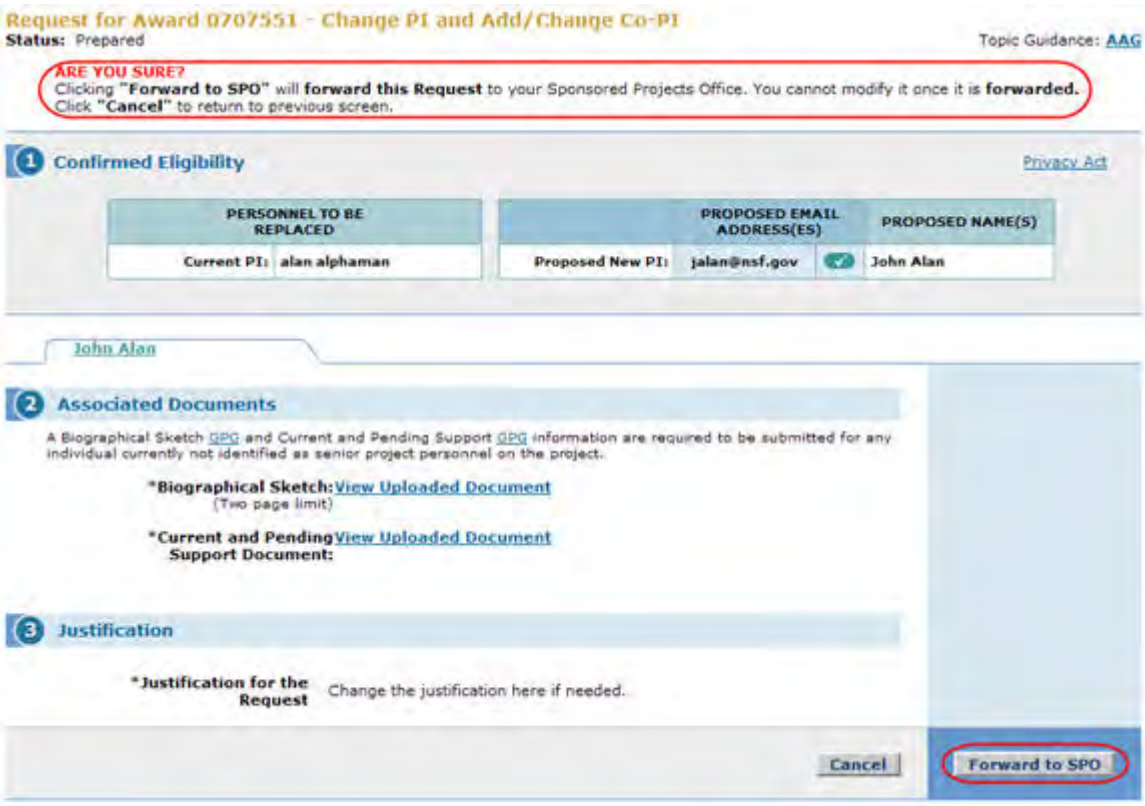


Figure 2 Request for Change PI and Add/Change PI screen. The message for you to confirm that you want to forward the request to the SPO and the Forward to SPO button are circled.

3. Click the **Forward to SPO** button (Figure 2). The **Forwarded** screen displays (Figure 3) with the message that the request has been forwarded to your SPO.

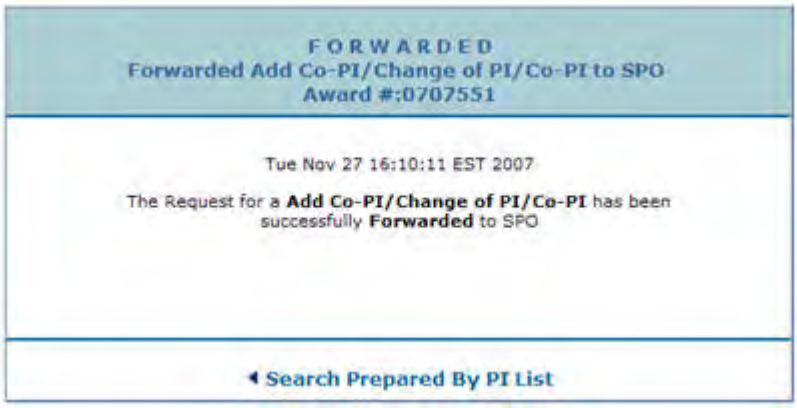


Figure 3 Forwarded screen with the message that the request has been forwarded to the SPO.

4. Click the **Search Prepared by PI List** link (Figure 3). The **Notifications and Requests** screen displays on the **Prepared by PI** tab.

Submit a Change PI and Add/Change Co-PI Request (AOR only)

Only an AOR may submit a Change PI and Add/Change PI Request.

Note: This document shows how to submit a request that the SPO has prepared. See Submit a Request Forwarded by the PI for instructions on how to submit a Change PI and Add/Change Co-PI Request that has been forwarded by the PI.

1. Access the **Request for Change PI and Add/Change Co-PI** screen (Figure 1). For how to access the screen, see Step 3 Justification or View a Notification or Request Prepared by the SPO.

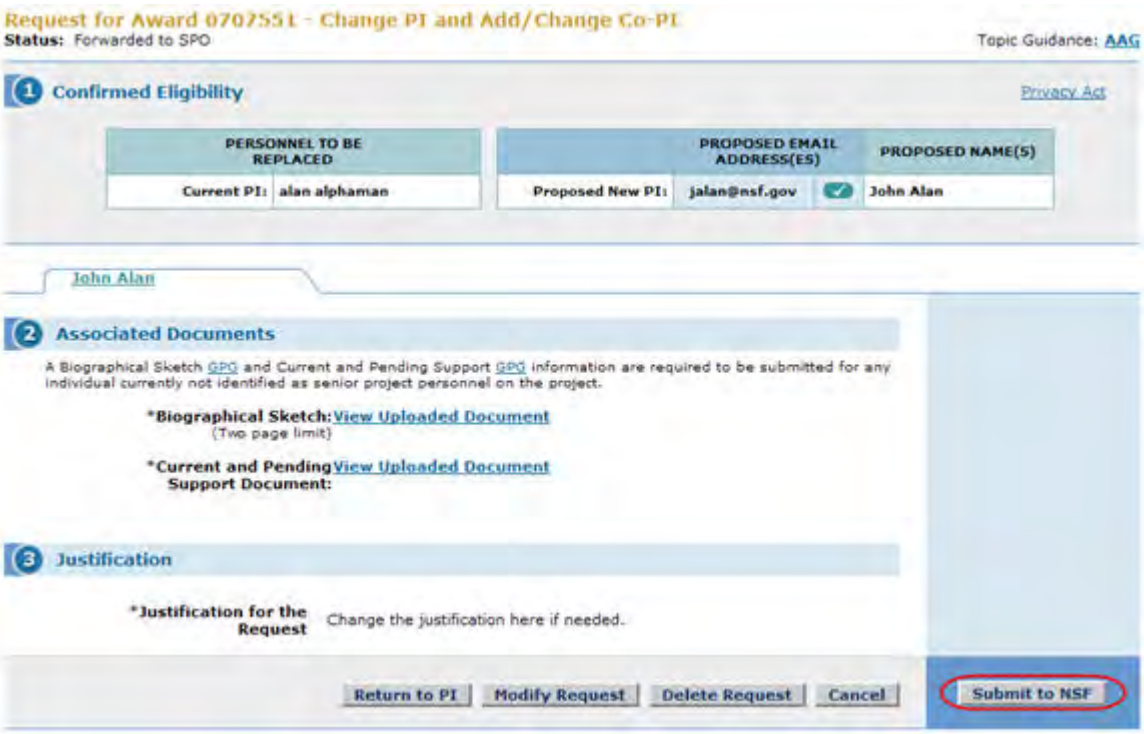


Figure 1 Request for Change PI and Add/Change Co-PI screen. The Submit to NSF button is circled.

2. On the **Request for Change PI and Add/Change Co-PI** screen (Figure 1), click the **Submit to NSF** button (Figure 1). The **Submit Request for Add/Change PI** screen displays (Figure 2) with a message for you to confirm that you want to submit the request to NSF.

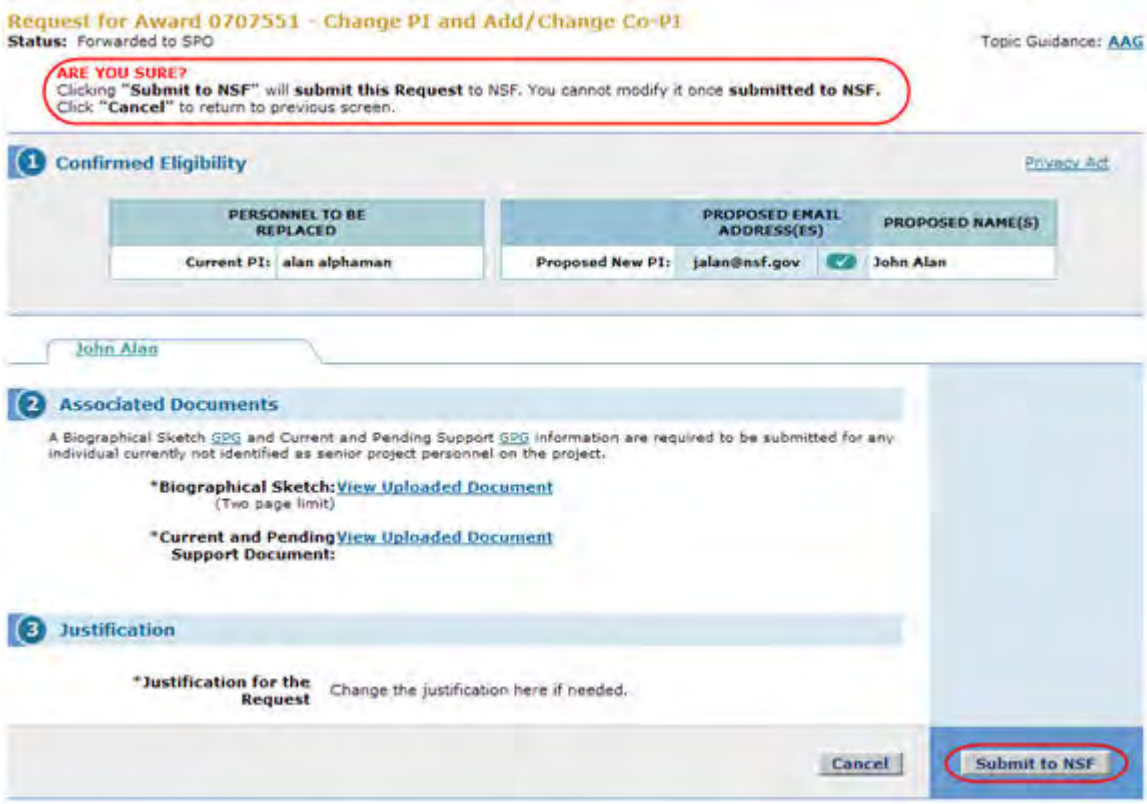


Figure 2 Request for Change PI and Add/Change PI screen. The message for you to confirm that you want to submit the request to NSF and the Submit to NSF button are circled.

3. Click the **Submit to NSF** button (Figure 2). If you have permissions as an Authorized Organizational Representative (AOR), the **Verify Signature Information** screen displays (Figure 3) with a message for you to verify your information as an AOR.

Figure 3 Verify Signature Information screen. The Account Management link and the Sign button are circled.

4. *If you need to change the information*, click **Account Management** (Figure 3) (see Verify Your Signature Information for instructions on how to change your information).
5. If you are ready to submit the request to NSF, click the **Sign** button (Figure 3). The **Submitted** screen displays (Figure 4) with the message that the Change PI and Add/Change Co-PI Request has been submitted to NSF.

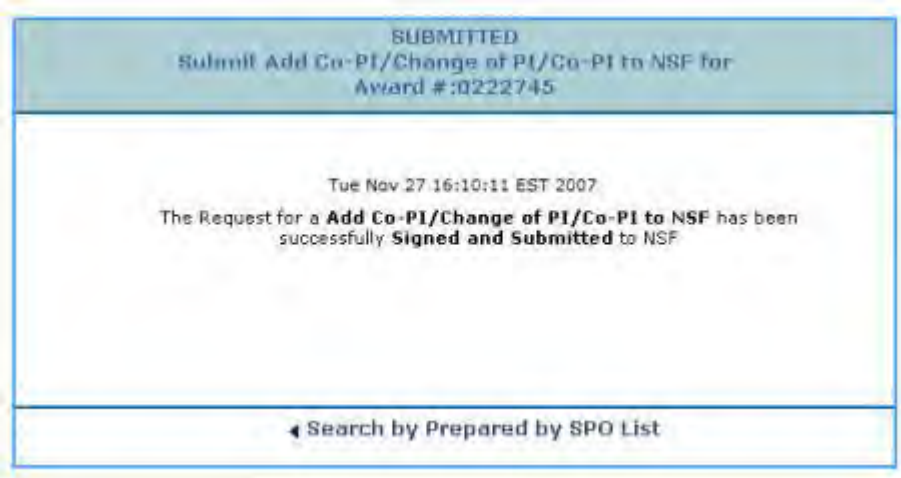


Figure 4 Submitted screen with the message that the Change PI and Add/Change Co-PI Request has been submitted to NSF.

6. Click the **Search Prepared by SPO List** (Figure 4). The **Notifications and Requests** screen displays on the **Prepared by SPO** tab.

Delete a Change PI and Add/Change Co-PI Request

1. Access the **View Request for Change PI and Add/Change Co-PI** screen (Figure 1). See one of the following:
   - Step 3 Justification
   - View a Notification or Request Prepared by the PI
   - View a Notification or Request Prepared by the SPO

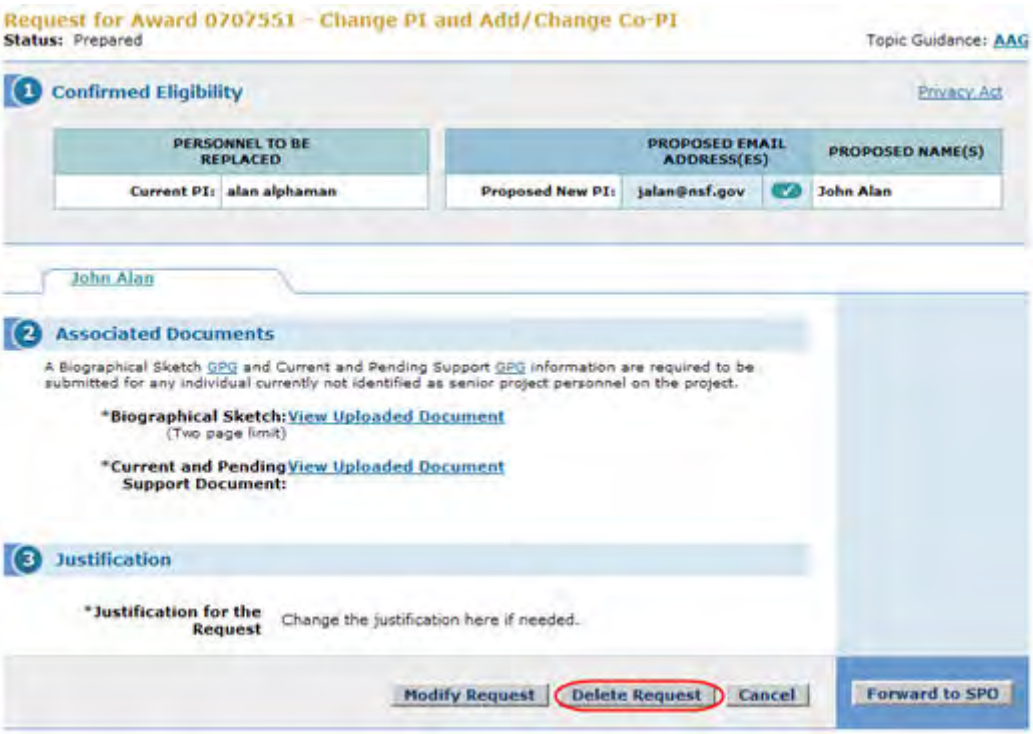


Figure 1 Request for Change PI and Add/Change Co-PI screen. The Delete Request button is circled.

2. Click the **Delete Request** button (Figure 1). The **Request for Change PI and Add/Change Co-PI** screen displays (Figure 2) with a message for you to confirm that you want to delete the request.

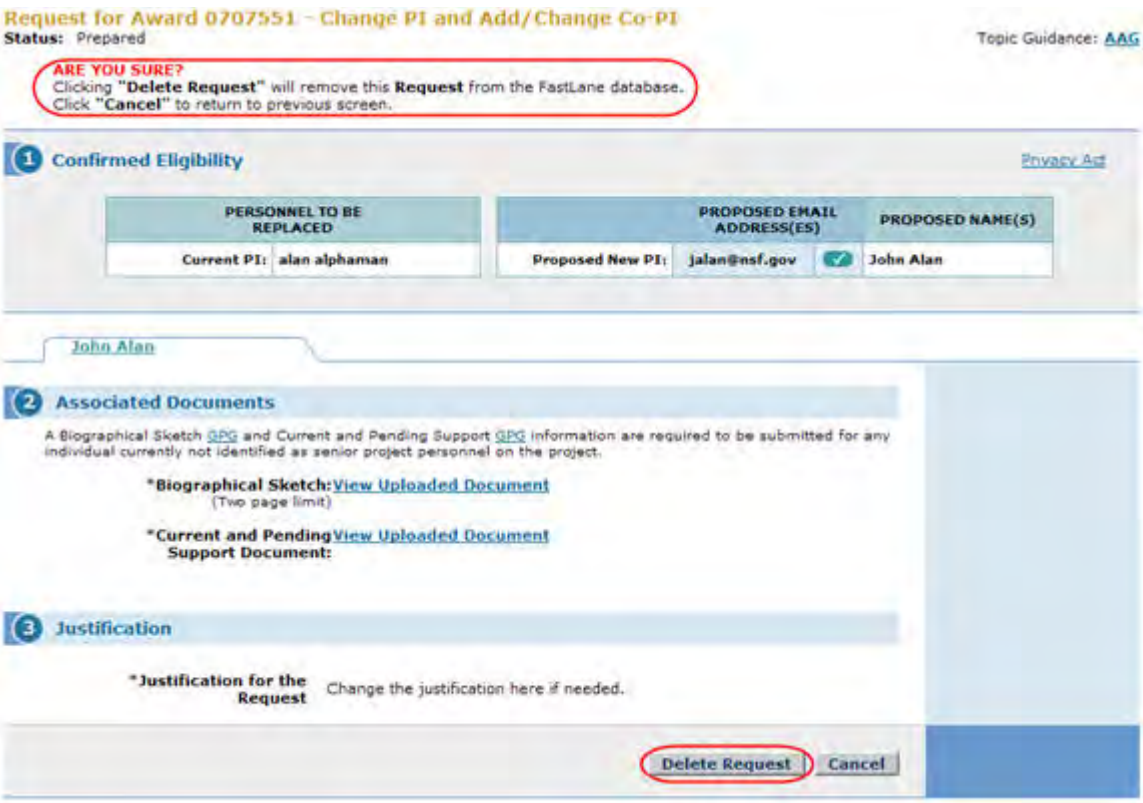


Figure 2 Request for Change PI and Add/Change PI screen. The message for you to confirm that you want to delete the request and the Delete Request button are circled.

3. Click the **Delete Request** button (Figure 2). The **Deleted** screen displays (Figure 3) with the message that the request has been deleted.

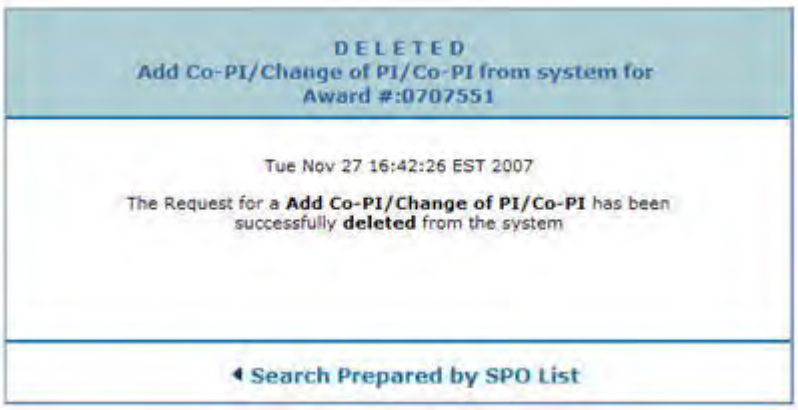


Figure 3 Deleted screen with the message that the Change PI and Add/Change Co-PI Request has been deleted.

4. Click the **Search Prepared by SPO List** (Figure 3). The **Notifications and Requests** screen on the **Prepared by SPO** tab displays. (If you are a PI, the **Search Prepared by PI List** link displays on the **Change PI and Add/Change Co-PI** screen. Click the link, and the **Notifications and Requests** screen on the **Prepared by PI** tab displays.)

Request Functions

Request Functions Introduction

After you have initiated a request, you have these options for further working:

- Modify a request
- Forward a request to the SPO
- Submit a request to NSF (AOR)
- Delete a request

Request Functions Introduction

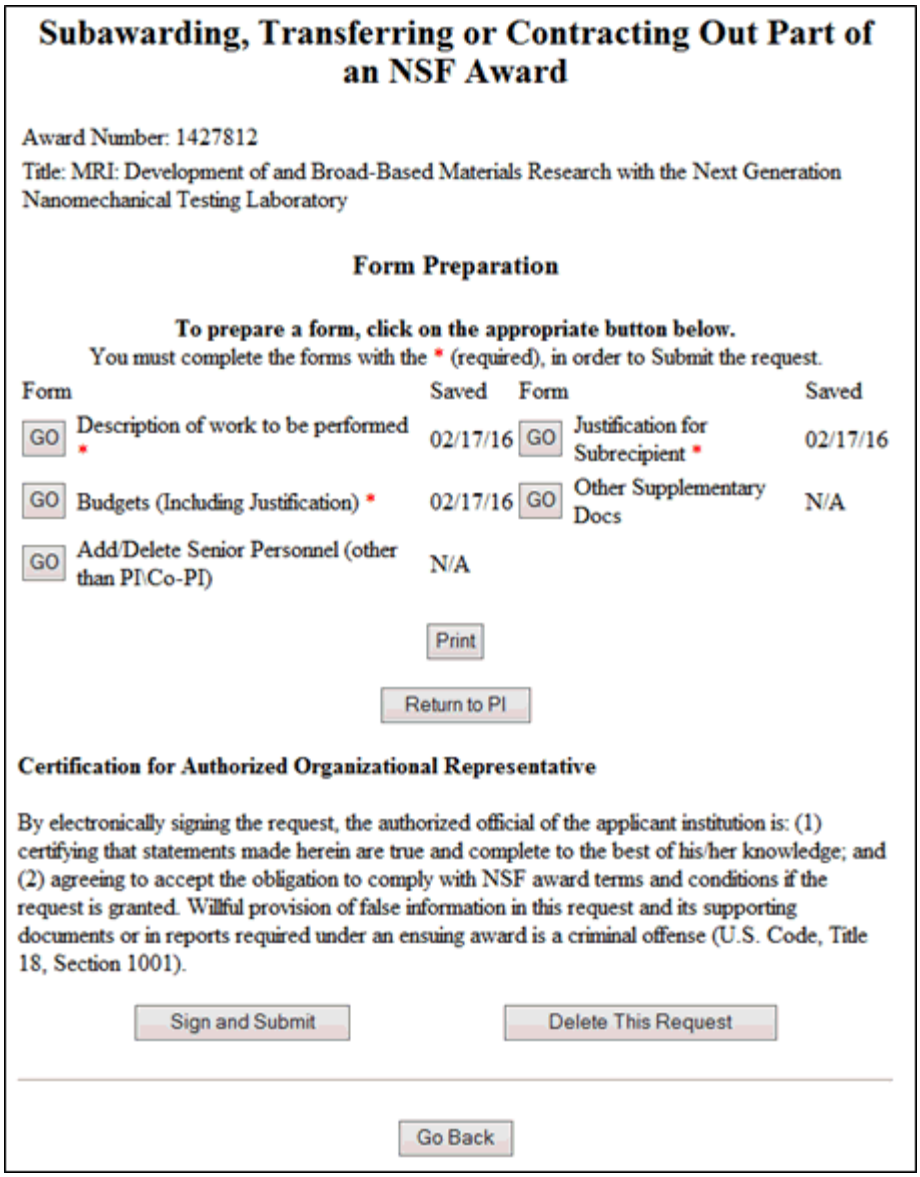
After you have initiated a request, you have these options for further working:

- Modify a request
- Forward a request to the SPO
- Submit a request to NSF (AOR)
- Delete a request

Modify a Request

Note: To modify requests for Addition of Subaward, Change PI and Add/Change Co-PI, or PI Transfer, see the instructions for that particular form.

1. Access the **View Request** screen (for Changes in Objective or Scope, as an example) (Figure 1). See one of the following:
   - Instructions for the type of request you are working on
   - If you are a PI, see View a Notification or Request Prepared by the PI
   - If you are an SPO, see View a Notification or Request Prepared by the SPO or View a Notification or Request Forwarded by the PI



Subawarding, Transferring or Contracting Out Part of an NSF Award

Award Number: 1427812

Title: MRI: Development of and Broad-Based Materials Research with the Next Generation Nanomechanical Testing Laboratory

Form Preparation

To prepare a form, click on the appropriate button below.
You must complete the forms with the * (required), in order to Submit the request.

Form	Saved	Form	Saved
GO Description of work to be performed *	02/17/16	GO Justification for Subrecipient *	02/17/16
GO Budgets (Including Justification) *	02/17/16	GO Other Supplementary Docs	N/A
GO Add/Delete Senior Personnel (other than PI\Co-PI)	N/A		

Print

Return to PI

Certification for Authorized Organizational Representative

By electronically signing the request, the authorized official of the applicant institution is: (1) certifying that statements made herein are true and complete to the best of his/her knowledge; and (2) agreeing to accept the obligation to comply with NSF award terms and conditions if the request is granted. Willful provision of false information in this request and its supporting documents or in reports required under an ensuing award is a criminal offense (U.S. Code, Title 18, Section 1001).

Sign and Submit Delete This Request

Go Back

Figure 1 View Request screen.

2. On the **View Request** screen (Figure 1), click on any of the forms to update.

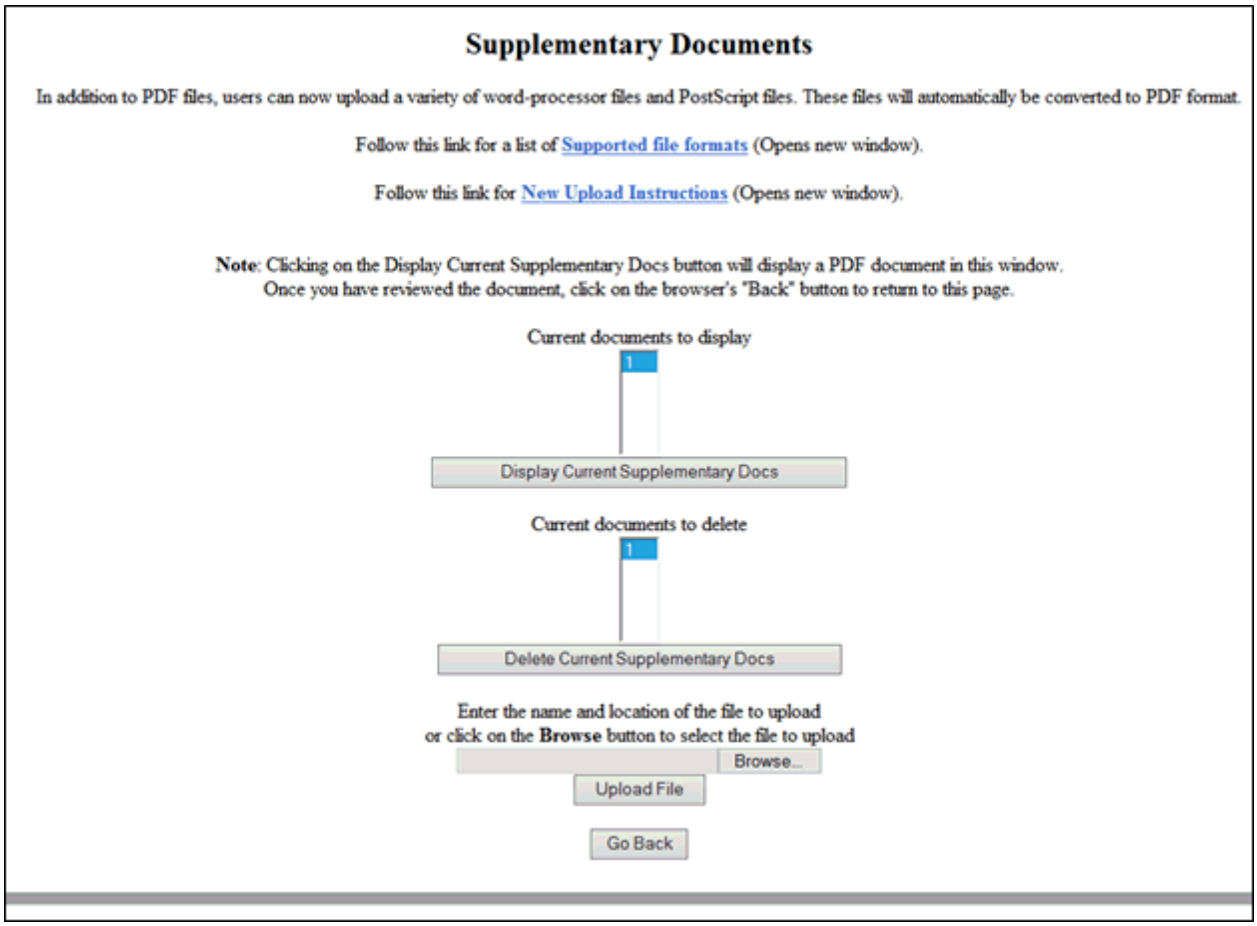
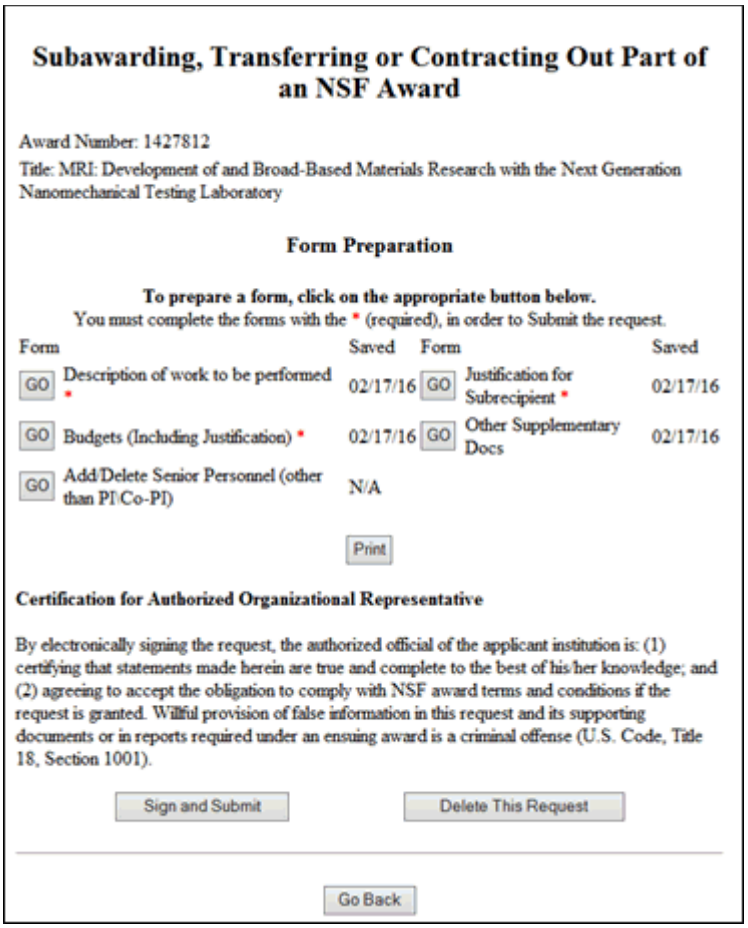


Figure 2 Modify Request screen.

3. Edit the request as you require. See the instructions for the particular request you are working on.
4. Click the **Save** button (Figure 2). The **View Request** screen displays (Figure 3) with the new information.



Subawarding, Transferring or Contracting Out Part of an NSF Award

Award Number: 1427812

Title: MRI: Development of and Broad-Based Materials Research with the Next Generation Nanomechanical Testing Laboratory

Form Preparation

To prepare a form, click on the appropriate button below.
You must complete the forms with the * (required), in order to Submit the request.

Form	Saved	Form	Saved
GO Description of work to be performed *	02/17/16	GO Justification for Subrecipient *	02/17/16
GO Budgets (Including Justification) *	02/17/16	GO Other Supplementary Docs	02/17/16
GO Add/Delete Senior Personnel (other than PI/Co-PI)	N/A		

Print

Certification for Authorized Organizational Representative

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Sign and Submit Delete This Request

Go Back

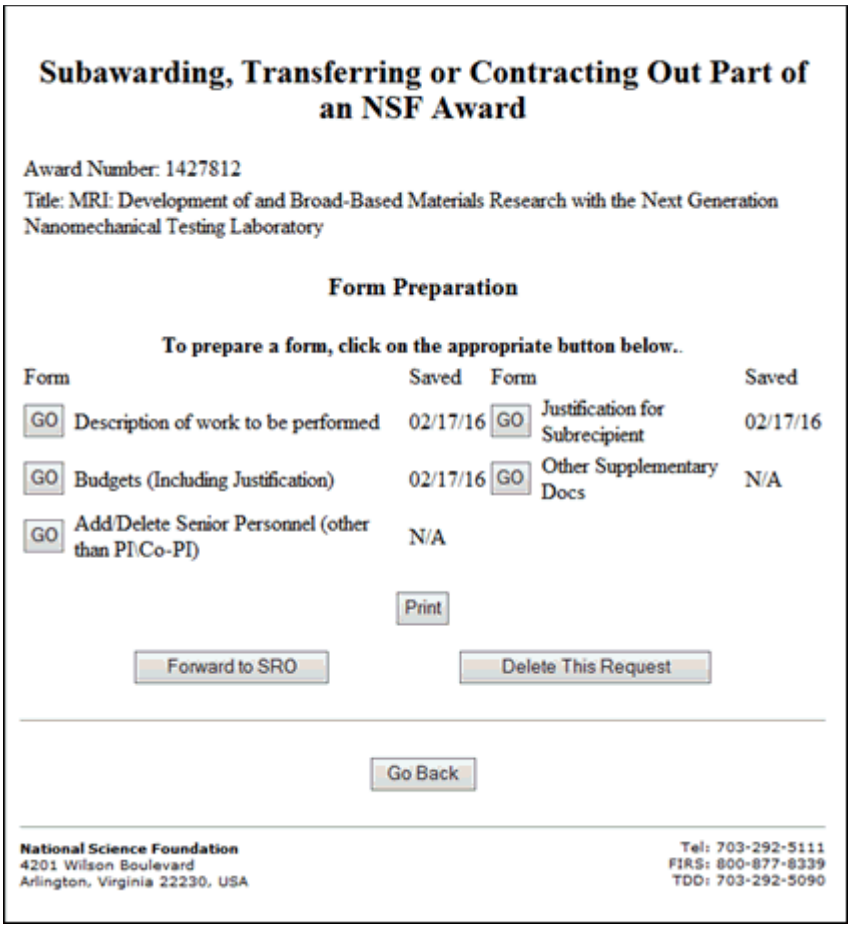
Figure 3 View Request screen with your modifications displayed.

Forward a Request to the SPO

Only a PI can forward a request to the SPO.

Note: To forward requests for Addition of Subaward, Change PI and Add/Change Co-PI, and PI Transfer, see the instructions for that particular form.

1. Access the **View Request** screen (Figure 1) (for Changes in Objective or Scope, as an example). See either of the following:
   - Instructions for the type of request you are working on
   - View a Request Prepared by the PI



Subawarding, Transferring or Contracting Out Part of an NSF Award

Award Number: 1427812

Title: MRI: Development of and Broad-Based Materials Research with the Next Generation Nanomechanical Testing Laboratory

Form Preparation

To prepare a form, click on the appropriate button below..

Form	Saved	Form	Saved
GO Description of work to be performed	02/17/16	GO Justification for Subrecipient	02/17/16
GO Budgets (Including Justification)	02/17/16	GO Other Supplementary Docs	N/A
GO Add/Delete Senior Personnel (other than PI\Co-PI)	N/A		

Print

Forward to SRO Delete This Request

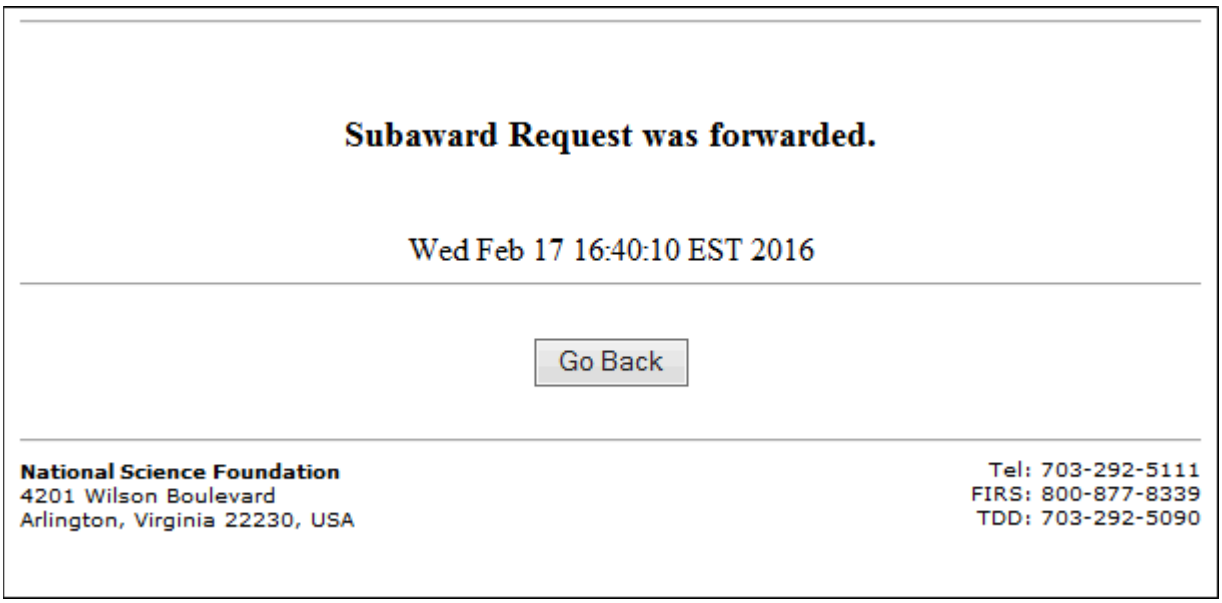
Go Back

National Science Foundation
4201 Wilson Boulevard
Arlington, Virginia 22230, USA

Tel: 703-292-5111
FIRS: 800-877-8339
TDD: 703-292-5090

Figure 1 View Request screen.

2. On the **View Request** screen (Figure 1), click the **Forward to SRO** button. The **Forwarded** screen displays (Figure 2) with a message that the request has been forwarded to the SPO.



Subaward Request was forwarded.

Wed Feb 17 16:40:10 EST 2016

Go Back

National Science Foundation
4201 Wilson Boulevard
Arlington, Virginia 22230, USA

Tel: 703-292-5111
FIRS: 800-877-8339
TDD: 703-292-5090

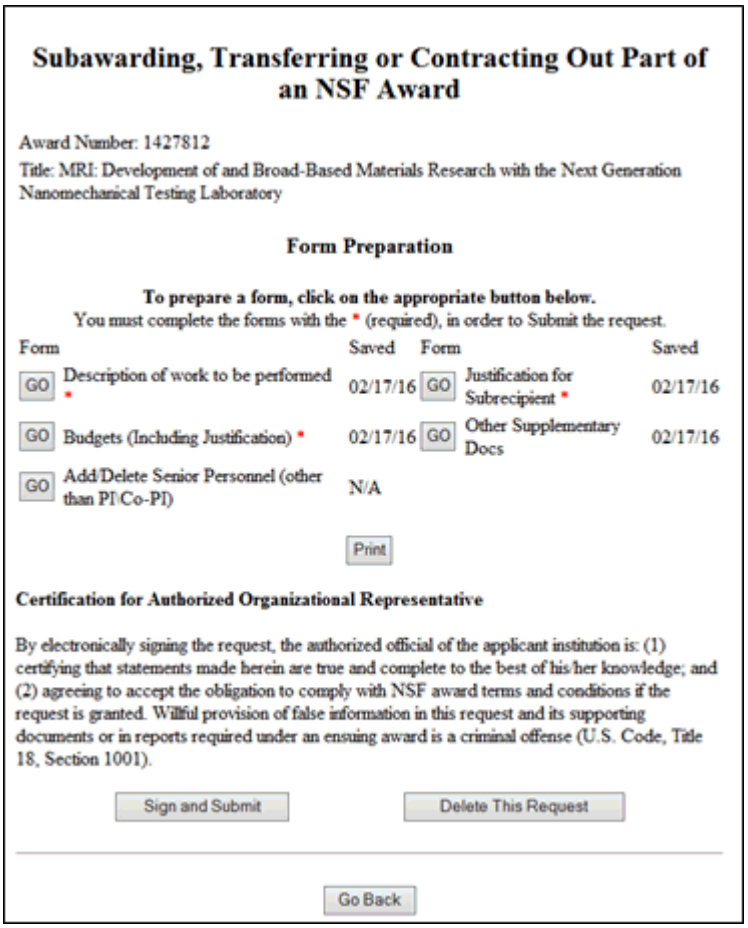
Figure2 Forwarded screen.

Submit a Request to NSF (AOR only)

Only the SPO can submit a request to NSF.

Note: To submit requests for Addition of Subaward, Change PI and Add/Change Co-PI, and PI Transfer, see the instructions for that particular form.

1. Access the **View Request** screen (for Changes in Objective or Scope, as an example) (Figure 1). See one of the following:
   - Instructions for the type of request you are working on
   - View a Notification or Request Prepared by the SPO/AOR
   - View a Notification or Request Forwarded by the PI



Subawarding, Transferring or Contracting Out Part of an NSF Award

Award Number: 1427812

Title: MRI: Development of and Broad-Based Materials Research with the Next Generation Nanomechanical Testing Laboratory

Form Preparation

To prepare a form, click on the appropriate button below.
You must complete the forms with the * (required), in order to Submit the request.

Form		Saved	Form		Saved
GO	Description of work to be performed *	02/17/16	GO	Justification for Subrecipient *	02/17/16
GO	Budgets (Including Justification) *	02/17/16	GO	Other Supplementary Docs	02/17/16
GO	Add/Delete Senior Personnel (other than PI/Co-PI)	N/A			

Print

Certification for Authorized Organizational Representative

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Sign and Submit Delete This Request

Go Back

Figure 1 View Request screen.

2. On the **View Request** screen (Figure 1), click the **Sign and Submit** button. The **Submitted** screen displays (Figure 2) with a message that the request has been submitted to NSF.

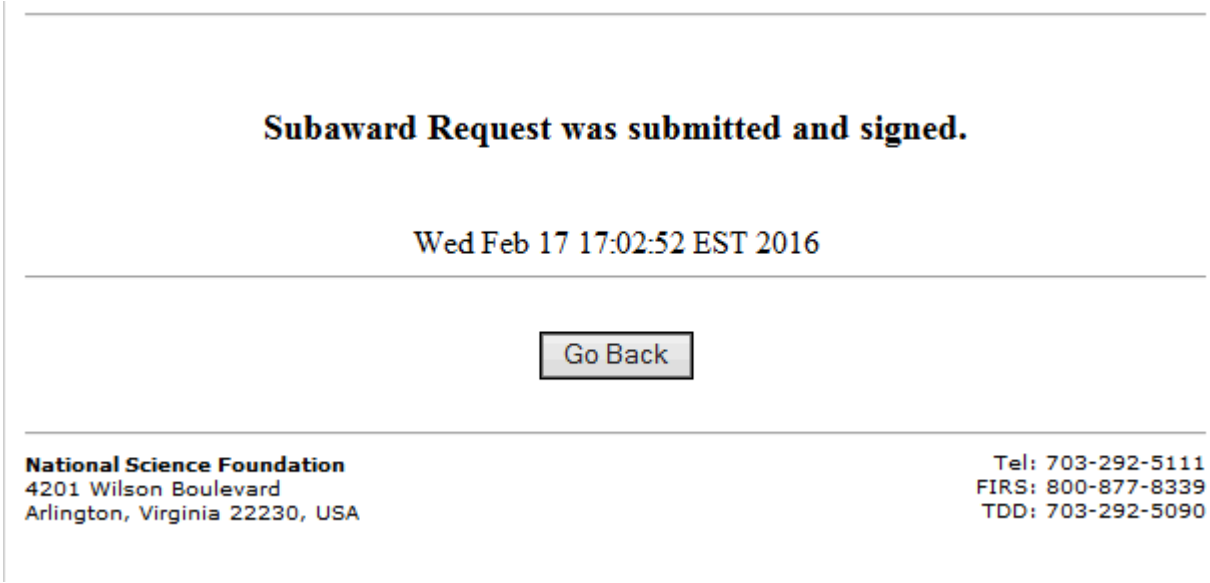
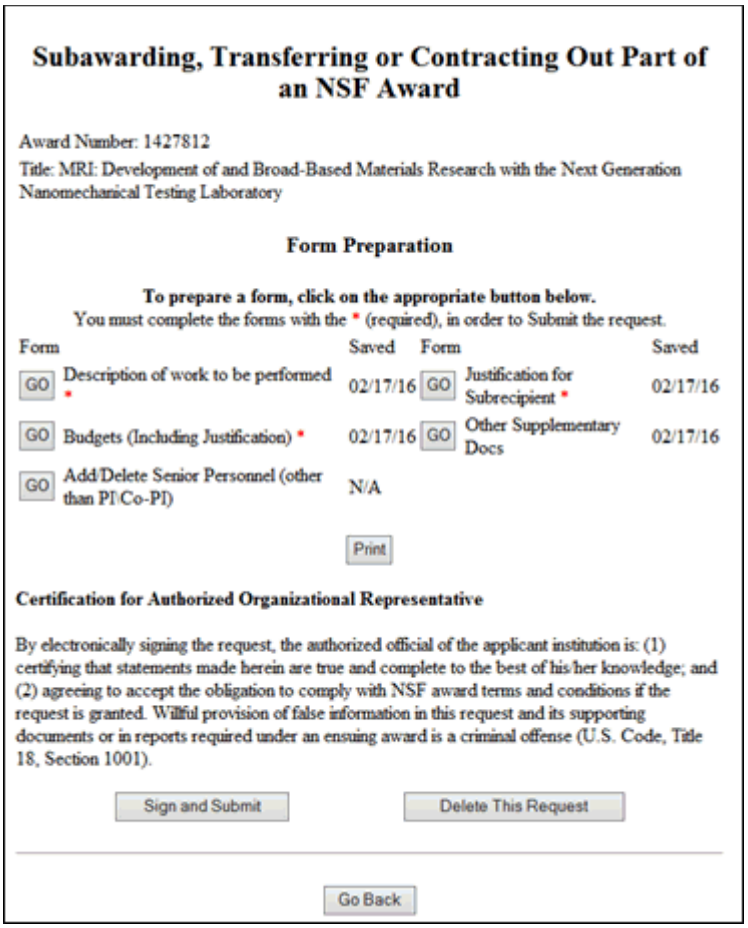


Figure 3 Submitted screen.

Delete a Request

Note: To delete requests for Addition of Subaward, Change PI and Add/Change Co-PI, and PI Transfer, see the instructions for that particular form.

1. Access the **View Request** screen (for Significant Changes in Person-Months Devoted to Project, as an example) (Figure 1). See one of the following:
   - Instructions for the type of request you are working on
   - If you are a PI, View a Notification or Request Prepared by the PI
   - If you are an SPO, View a Notification or Request Prepared by the SPO or View a Notification or Request Forwarded by the PI



Subawarding, Transferring or Contracting Out Part of an NSF Award

Award Number: 1427812

Title: MRI: Development of and Broad-Based Materials Research with the Next Generation Nanomechanical Testing Laboratory

Form Preparation

To prepare a form, click on the appropriate button below.
You must complete the forms with the * (required), in order to Submit the request.

Form		Saved	Form		Saved
GO	Description of work to be performed *	02/17/16	GO	Justification for Subrecipient *	02/17/16
GO	Budgets (Including Justification) *	02/17/16	GO	Other Supplementary Docs	02/17/16
GO	Add/Delete Senior Personnel (other than PI/Co-PI)	N/A			

Print

Certification for Authorized Organizational Representative

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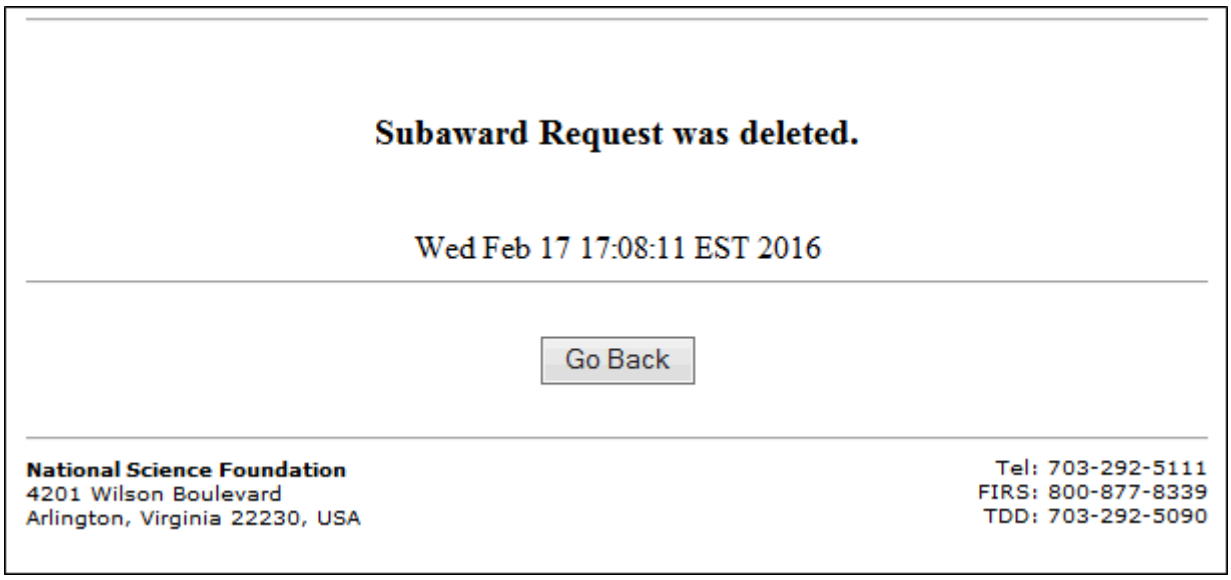
Sign and Submit Delete This Request

Go Back

Figure 1 View Request screen. The Delete button is circled.

2. On the **View Request** screen (Figure 1), click the **Delete** button. The **Deleted** screen displays (Figure 2) with the message that the request has been deleted.



Subaward Request was deleted.

Wed Feb 17 17:08:11 EST 2016

Go Back

National Science Foundation
4201 Wilson Boulevard
Arlington, Virginia 22230, USA

Tel: 703-292-5111
FIRS: 800-877-8339
TDD: 703-292-5090

Figure 2 Deleted screen.

Continuation Funding Status

Check Continuation Funding Status Introduction

Both the Principal Investigator (PI) and the Sponsored Project Office (SPO) representative can check the continuation funding status for an award. The status check reports:

- Amount of the incremental funding supplements
- Fiscal year for each funding supplement
- If the funding supplement has been awarded or is still pending

You can:

- Check continuation funding status as a PI
- Check continuation funding status as an SPO/AOR

Check Continuation Funding Status Introduction

Both the Principal Investigator (PI) and the Sponsored Project Office (SPO) representative can check the continuation funding status for an award. The status check reports:

- Amount of the incremental funding supplements
- Fiscal year for each funding supplement
- If the funding supplement has been awarded or is still pending

You can:

- Check continuation funding status as a PI
- Check continuation funding status as an SPO/AOR

Check Continuation Funding Status as a PI

1. On the **FastLane Home Page** screen, log in as a PI to Proposals, Awards, and Status (see PI/Co-PI Login). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management** screen displays (Figure 1).

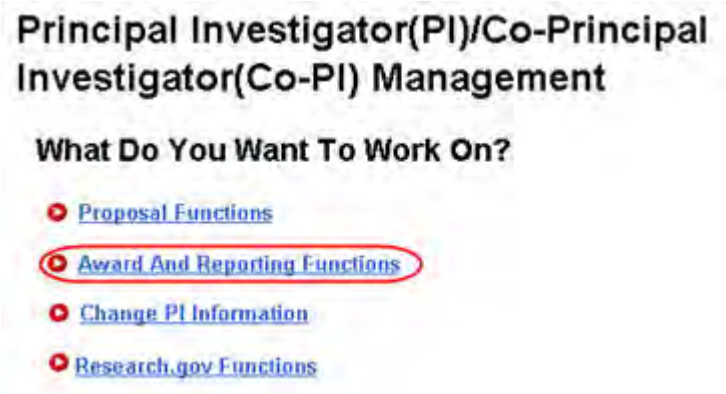


Figure 1 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management screen. The Award and Reporting Functions link is circled.

2. Click **Award and Reporting Functions** (Figure 1). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Award and Reporting Functions** screen displays (Figure 2).

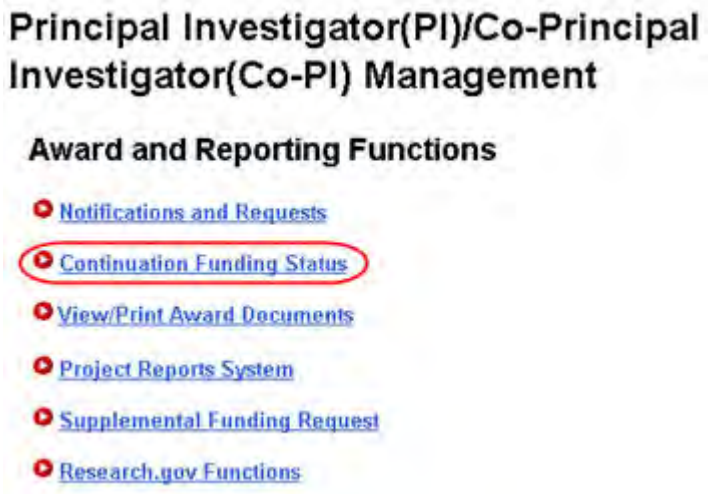


Figure 2 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Award and Reporting Functions screen. The Continuation Funding Status link is circled.

3. Click **Continuation Funding Status** (Figure 2). The **List of Awards** screen displays (Figure 3) with a listing of awards.

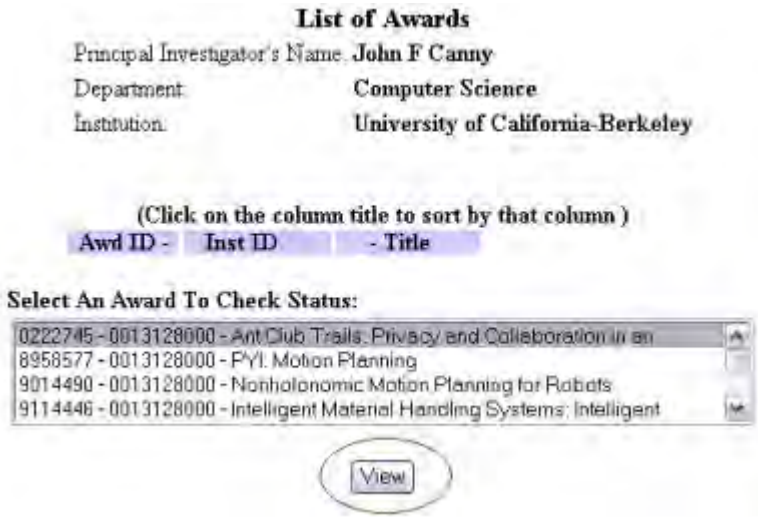


Figure 3 List of Awards screen. The View button is circled.

4. In the **Select An Award to Check Status** list (Figure 2), highlight the award whose continuation funding status you want to check.
5. Click the **View** button (Figure 3). The **Continuing Grant Increments** screen displays (Figure 4) with the status of the funding increments for that award.

Figure 4 Continuing Grant Increments screen.

Check Continuation Funding Status as an SPO / AOR

1. On the **FastLane Home Page** screen, log in to Research Administration (see SPO/AOR Login). The **Research Administration** screen displays (Figure 1).

Figure 1 Research Administration screen. The Organizational Reports link is circled.

2. Click **Organizational Reports** (Figure 1). The **Organizational Reports** screen displays (Figure 2).

Figure 2 Organizational Reports screen. The radio button for Continuing Grant Increments and the Continue button are circled.

3. In the **Select Organization Name** drop-down box (Figure 2), select the name of the organization whose award you are checking.
4. In the **Indicate Report Type** list (Figure 2), click the radio button for Continuing Grant Increments.
5. Click the **Continue** button (Figure 2). The **Continuing Grant Increments** screen displays (Figure 3).

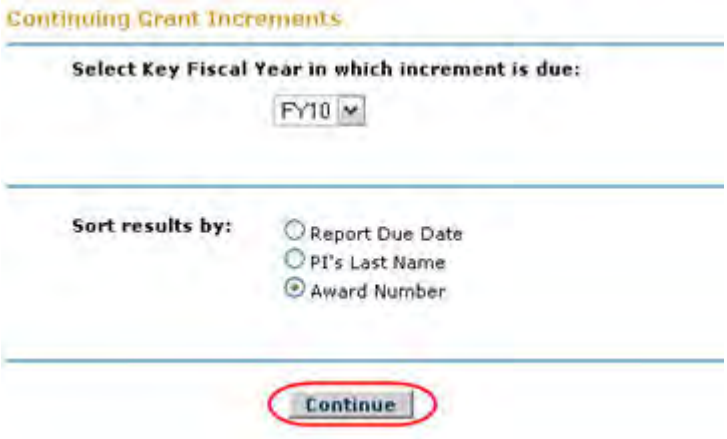


Figure 3 Continuing Grant Increments screen. The Continue button is circled.

7. In the **Select Key Fiscal Year in which Increment Is Due** drop-down box (Figure 3), select the fiscal year for the award you want to check.
8. In the **Sort Results By** list (Figure 3), click a radio button (Figure 3) for a criterion to sort the awards by:
    - Final project due date
    - PI's last name
    - Award number
9. Click the **Continue** button (Figure 3). The **Continuing Grant Increments Search Results** screen displays (Figure 4) with a listing of the awards that meet your search criteria.

Search Results for Awards by Continuing Grant Increments FY11:

Click on "Award Number" to view details for the Awards Project Report(s). Sort results by clicking column titles.

43 Awards found, displaying 1 to 10 [< Previous 10] **1**, 2, 3, 4, 5 [Next 10 >]

Award Number	PI Name	Award Title	Report Due Date	Date of Next Increment Expected	Increment Amount
0642843	Jin, Hailing	CAREER:Genome-wide Analysis of Pathogen-induced Endogenous siRNAs in Plant Defense Responses in Arabidopsis	02/28/2011	05/31/2011	$160,484.00
0643325	Maduro, Morris	CAREER: Evolution of the Endomesoderm Gene Regulatory Network in Nematodes	11/30/2010	02/29/2012	$140,000.00
0643695	Tuncel, Ertem	CAREER: LOW-DELAY COMMUNICATION IN SENSOR NETWORKS VIA PREDICTION- AND TRANSFORM-BASED DISTRIBUTED SOURCE CODING	03/31/2011	06/30/2011	$55,240.00
0645668	Zandi, Roya	CAREER: Physics of Virus Structure: Energetics and Dynamics	11/30/2010	02/28/2011	$80,000.00
0730616	Heraty, John	PEET: Consolidation of Research and Training Activities in Chalcidoidea (Hymenoptera)	05/31/2011	08/31/2011	$150,000.00
0731660	Walker, Sharon	URM: Mentoring Year-round in Biological Engineering, Science and Technology (MY BEST at University of California, Riverside)	05/31/2011	08/31/2011	$111,922.00
0743166	Fairbairn, Daphne	Assessing the Association Between Sex-Linkage and Sexual Dimorphism: A Novel Quantitative Genetic Approach.	01/31/2011	04/30/2011	$74,000.00
0745592	Lyons, Timothy	COLLABORATIVE RESEARCH: Chemostratigraphic Analysis of Panthalassic and Tethyan Permian-Triassic Boundary Sections: Assessment of Global Paleoceanographic Dynamics	12/31/2010	03/31/2011	$15,000.00
0745602	Lyons, Timothy	COLLABORATIVE RESEARCH: Atmospheric Dust as an Archive and Agent of Climate ChangeDuring the Late Paleozoic Icehouse	11/30/2010	02/28/2011	$43,998.00
0748910	Lau, Chun Ning	CAREER: Quantum Transport of Charges in Graphene	10/31/2010	01/31/2011	$100,000.00

Transfer Data to: Excel

Cancel

Figure 4 Continuing Grant Increments Search Results screen. The award number is circled for an award.

10. Click the award number (Figure 4) on the row of the award whose status you are checking. The **Continuing Grant Increments** screen displays (Figure 5) with the status of the funding increments for that award.

Figure 5 Continuing Grant Increments screen.

View/Print Award Documents

View and Print Award Documents Introduction

Print the contents of the View/Print Award Documents book.

FastLane gives you the opportunity to view the documents associated with both active and expired awards.

The Principal Investigator (PI), Co-PIs, the Sponsored Project Office (SPO), and Authorized Organizational Representative (AOR) can access the View and Print Award Documents application.

The PI views the award documents for those awards for which he or she is PI. The SPO views the award documents for all awards of the organization he or she administers.

For both active and expired awards, you can view the following:

- The Award Letter
- Amendments to the award

If an award is a Cooperative Agreement established after March 2005, you can also view the following:

- The most current and past versions of the Cooperative Agreement
- The last notice sent
- The original and amended budgets
- The prior award letter (available only to PIs)
- The amended expiration dates for an award
- The list of awards for the same NSF program as the award

You may also view the Cooperative Agreement in PDF format.

Go to View and Print Award Documents as a PI or View and Print Award Documents as an SPO/AOR for instructions on beginning to view Award Documents.

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Go to View and Print Award Documents as a PI or View and Print Award Documents as an SPO/AOR for instructions on beginning to view Award Documents.

Access View/Print Award Documents

Access View/Print Award Documents

Access View/Print Awards Documents by role:

- As a PI
- As an SPO/AOR

Access View/Print Award Documents

Access View/Print Awards Documents by role:

- As a PI
- As an SPO/AOR

View and Print Award Documents as a PI

1. On the **FastLane Home Page** screen, log in to Proposals, Awards, and Status as a PI. The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management** screen displays (Figure 1).

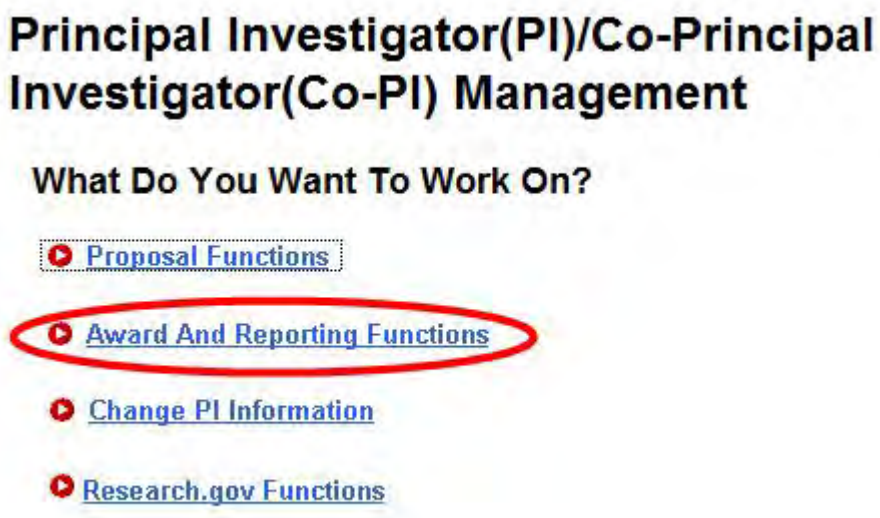

Figure 1 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management screen. The Award and Reporting Functions link is circled.

2. Click **Award and Reporting Functions** (Figure 1). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Award and Reporting Functions** screen displays (Figure 2).

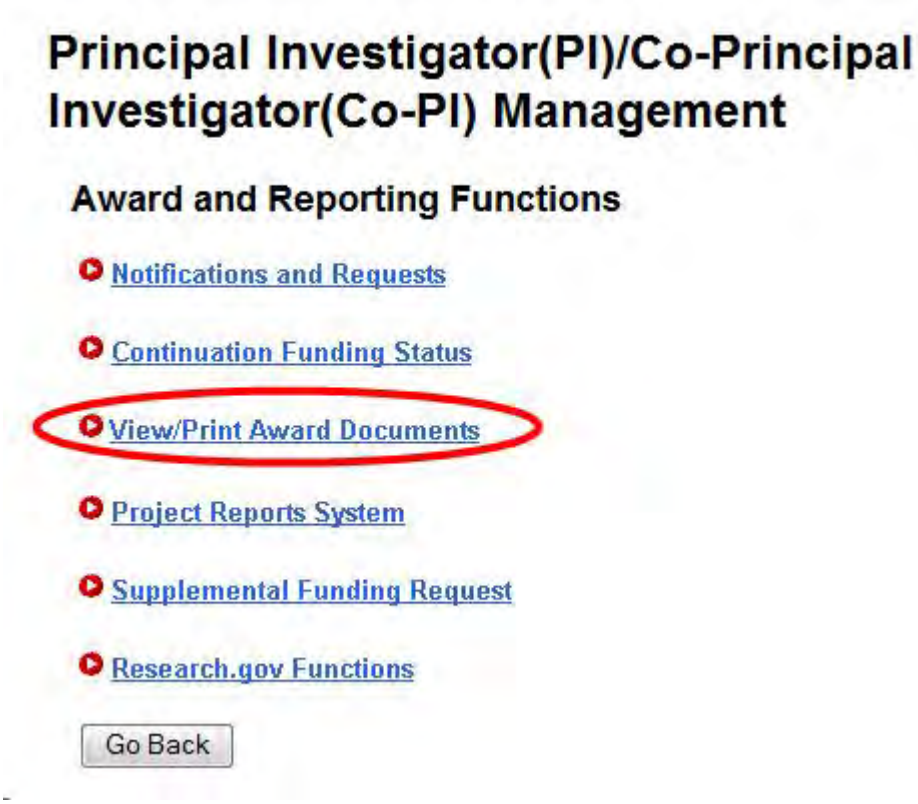

Figure 2 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Award and Reporting Functions screen. The View/Print Award Letters link is circled.

3. Click **View/Print Award Letters** (Figure 2). The **Award Documents** screen displays on the **Active Awards** tab (Figure 3). You have these options on this screen:
   - View the award document or View a Cooperative Agreement
   - View the amendments to an award
   - Search for active awards

   (Click on a link above for instructions for that action.)

You also have the option of viewing and printing award letters for expired awards (see View Award Documents for Expired Awards).

Figure 3 Award Documents screen on the Active Awards tab.

View and Print Award Documents as an SPO/AOR

1. On the **FastLane Home Page** screen, log in to Research Administration. The **Research Administration** screen displays (Figure 1).

Figure 1 Research Administration screen. The Award Documents link is circled.

2. Click **Award Documents** (Figure 1). The **Award Documents** screen displays on the **Active Awards** tab (Figure 2) with a listing of all the active awards for your organization. You have these options:
   - View the award document or View a Cooperative Agreement
   - View the amendments to the award
   - Search for active awards

   (Click on a link above for instructions for that action.)

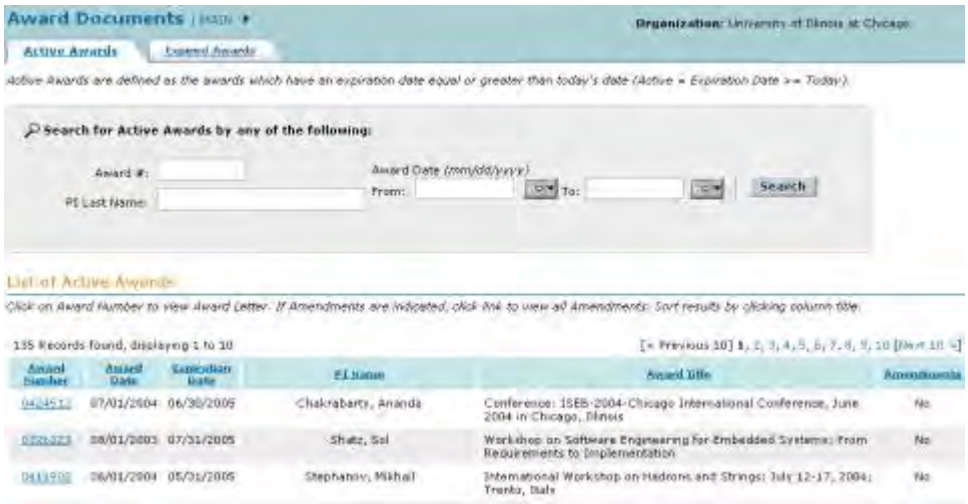

Figure 2 Award Documents screen on the Active Awards tab.

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Search for Awards

Search for Awards Introduction

Search for awards by role:

- As a PI
- As an SPO/AOR

Search for Awards Introduction

Search for awards by role:

- As a PI
- As an SPO/AOR

Search for Awards as a PI

You can search for awards on the **Award Documents** screen on either the **Active Award** tab or the **Expired Awards** tab. The steps are identical and are presented below.

1. Access the **Award Documents** screen (Figure 1) (see View and Print Award Documents as a PI).

Figure 1 Award Documents screen on the Active Awards tab. The Search button is circled.

2. In the **Search** section (Figure 1) of the **Awards Document** screen on the **Active Awards** (or **Expired Awards**) tab, you can search for awards by either of the following criteria:
   - **Award Number**
     In the **Award #** box (Figure 1), type the award number.
   - **Award Date Range**
     In the **From** box (Figure 1), type the start date for the date range.
     In the **To** box (Figure 1), type the end date for the date range.
3. Click the **Search** button (Figure 1). The **Award Documents** screen displays (Figure 2) with the results of your search in the **List of Active** (or **Expired**) **Awards** section.

Figure 2 Award Documents screen with the search results in the List of Active Awards section.

4. Click the **Search** button (Figure 2) to return to a listing of all awards.

Search for Awards as an SPO/AOR

You can search for awards on the **Award Documents** screen on either the **Active Awards** tab or the **Expired Awards** tab. The steps are the same as presented below.

1. Access the **Award Documents** screen (Figure 1) (see View and Print Award Documents as an SPO/AOR).

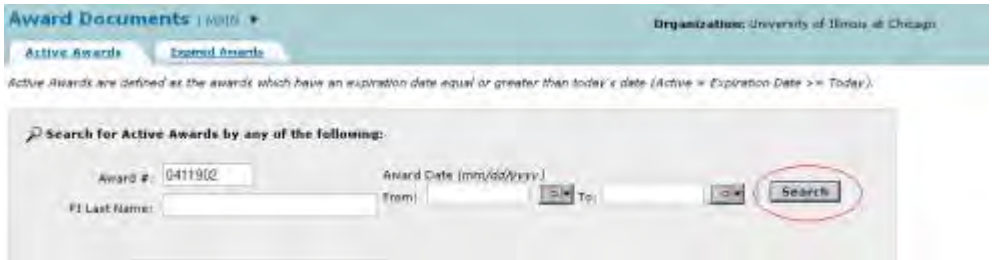


Figure 1 Award Documents screen on the Active Awards tab. The Search button is circled.

2. In the **Search** section (Figure 1) of the **Award Documents** screen on the **Active Awards** (or **Expired Awards**) tab, you can search for awards by any one or a combination of the following criteria:
   - **Award Number**
     In the **Award #** box (Figure 1), type the award number.
   - **PI Last Name**
     In the **PI Last Name** box (Figure 1), type the PI's last name.
   - **Award Date Range**
     In the **From** box (Figure 8), type the start date for the date range.
     In the **To** box (Figure 1), type the end date for the date range.
3. Click the **Search** button (Figure 1). The **Award Documents** screen displays (Figure 2) with the results of your search in the **List of Active** (or **Expired**) **Awards** section.

Figure 2 Award Documents screen with the search results in the List of Active Awards section.

4. Click the **Search** button (Figure 2) to return to a listing of all awards.

View an Award Document

If an award is a Cooperative Agreement established after March 2005, see View a Cooperative Agreement for instructions.

1. Access the **Award Documents** screen on the **Active Awards** tab (Figure 1) (see View and Print Award Documents as a PI or View and Print Award Documents as an SPO/AOR).

Figure 1 Award Documents screen on the Active Awards tab. The award number is circled for an award.

2. On the **Award Documents** screen on the **Active Awards** tab (Figure 1), click the award number on the row for the award whose documents you want to view. The **National Science Foundation** screen displays (Figure 2) for that award.

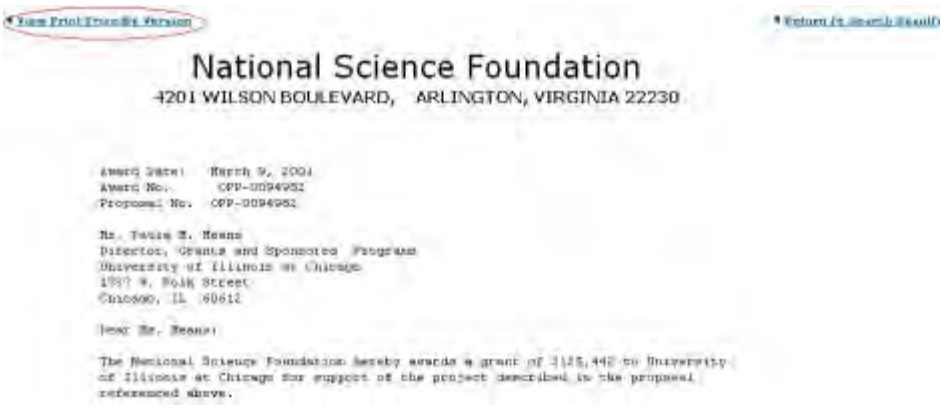


Figure 2 National Science Foundation screen. The View Print-Friendly Version link is circled.

3. To print the award, click **View Print-Friendly Version** (Figure 2). The award letter displays (Figure 3) in a print-friendly version.

Figure 3 Print-friendly version of the award letter.

4. Click the **Print** command on your browser to print the award letter.

View a Cooperative Agreement

View a Cooperative Agreement

If an award is a Cooperative Agreement established after March 2005, you can view the Cooperative Agreement and its associated documents.

1. Access the **Award Documents** screen on the **Active Awards** tab (Figure 1) (see View and Print Award Documents as a PI or View and Print Award Documents as an SPO/AOR).

Figure 1 Award Documents screen on the Active Awards tab. The award number is circled for an award.

2. On the **Award Documents** screen on the **Active Awards** tab (Figure 1), click the award number on the row for the award whose documents you want to view. The **Cooperative Agreement** screen displays (Figure 2) for that award. You have these options on the screen:
   - Choose an award version to view
   - View the amended expiration dates for an award
   - View the awarded funds by amendment
   - View the list of awards for the award's NSF program
   - View the last notice sent
   - View the original and amended budgets
   - View the prior award (available to PIs only)
   - View the award document in PDF format

   (Click on a link for instructions for that action.)

Figure 2 Cooperative Agreement screen.

View a Cooperative Agreement

If an award is a Cooperative Agreement established after March 2005, you can view the Cooperative Agreement and its associated documents.

1. Access the **Award Documents** screen on the **Active Awards** tab (Figure 1) (see View and Print Award Documents as a PI or View and Print Award Documents as an SPO/AOR).

Figure 1 Award Documents screen on the Active Awards tab. The award number is circled for an award.

2. On the **Award Documents** screen on the **Active Awards** tab (Figure 1), click the award number on the row for the award whose documents you want to view. The **Cooperative Agreement** screen displays (Figure 2) for that award. You have these options on the screen:
   - Choose an award version to view
   - View the amended expiration dates for an award
   - View the awarded funds by amendment
   - View the list of awards for the award's NSF program
   - View the last notice sent
   - View the original and amended budgets
   - View the prior award (available to PIs only)
   - View the award document in PDF format

   (Click on a link for instructions for that action.)

Figure 2 Cooperative Agreement screen.

View the Amended Expiration Dates for an Award

1. Access the **Cooperative Agreement** screen (Figure 1) (see View a Cooperative Agreement).

Figure 1 Cooperative Agreement screen. The End Date with the plus sign in the box is circled.

2. On the **Cooperative Agreement** screen (Figure 1), click the plus sign in the box next to the End Date. A listing of the dates for each amendment displays on the screen (Figure 2).

Figure 2 Cooperative Agreement screen with the amended expiration dates now listed under the latest End Date.

Choose an Award Version to View

1. Access the **Cooperative Agreement** screen (Figure 1) (see [View a Cooperative Agreement]).

Figure 1 Cooperative Agreement screen. The Choose Version link is circled.

2. On the **Cooperative Agreement** screen (Figure 1), click **Choose Version**. The **List of Active Amendments** screen displays (Figure 2) with a listing of all the amendments for the Cooperative Agreement.

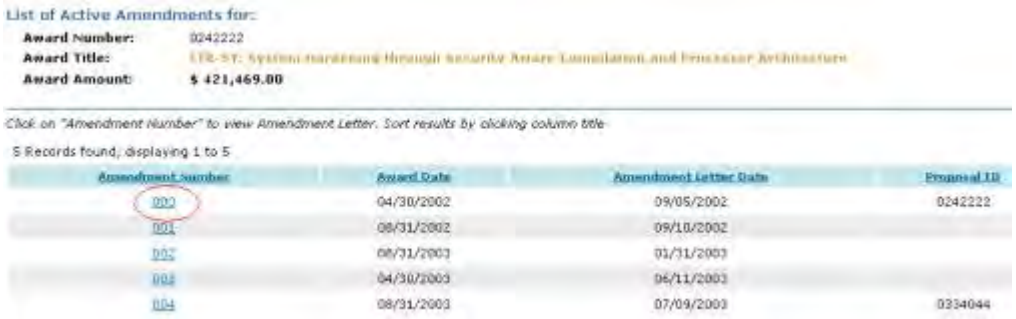


Figure 2 List of Active Amendments screen. The amendment number is circled for an amendment.

3. Click the amendment number (Figure 2) on the row of the amendment that you want to view. The **Amendment** screen displays (Figure 3) with the link to the amendment.

Figure 3 Amendment screen with the link to the selected amendment.

View Awarded Funds by Amendment

1. Access the **Cooperative Agreement** screen (Figure 1) (see [View a Cooperative Agreement]).

Figure 1 Cooperative Agreement screen. The Cumulative Amount with the plus sign in the box is circled.

2. On the **Cooperative Agreement** screen (Figure 1), click the plus sign in the box next to the Cumulative Amount. A listing of the dates for each amendment displays on the screen (Figure 2).

Figure 2 Cooperative Agreement screen with the amended award fund amounts now listed under the current Cumulative Amount.

View the List of Awards for the NSF Program

1. Access the **Cooperative Agreement** screen (Figure 1) (see View a Cooperative Agreement).

Figure 1 Cooperative Agreement screen. The Show List of Awards link is circled.

2. On the **Cooperative Agreement** screen (Figure 1), click **Show List of Awards**. The **Award Search** screen displays in a new window (Figure 2), where you can search for the awards by program or other criteria. This screen takes you out of the FastLane system.

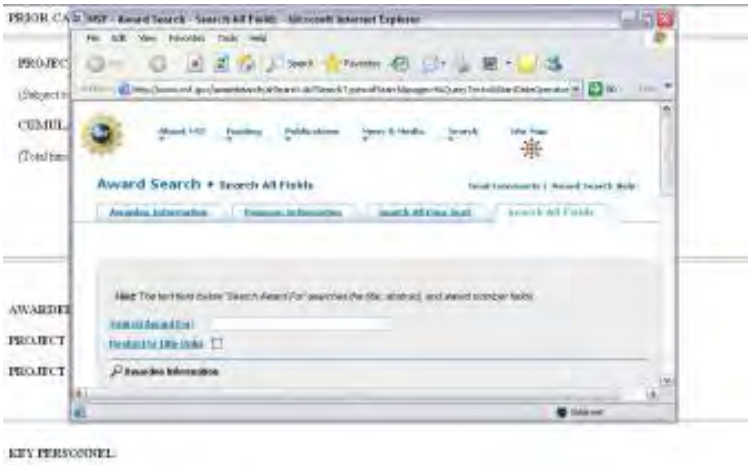


Figure 2 Award Search screen in a new window. This screen takes you out of the FastLane system.

3. When you have completed your award search, close the **Award Search** screen (Figure 2). The **Cooperative Agreement** screen displays (Figure 1).

View the Last Notice Sent

1. Access the **Cooperative Agreement** screen (Figure 1) (see View a Cooperative Agreement).

Figure 1 Cooperative Agreement screen. The Last Notice Sent link is circled.

2. On the **Cooperative Agreement** screen (Figure 1), click **Last Notice Sent**. The **Current Amendment** screen displays (Figure 2) with the link to the last amendment.

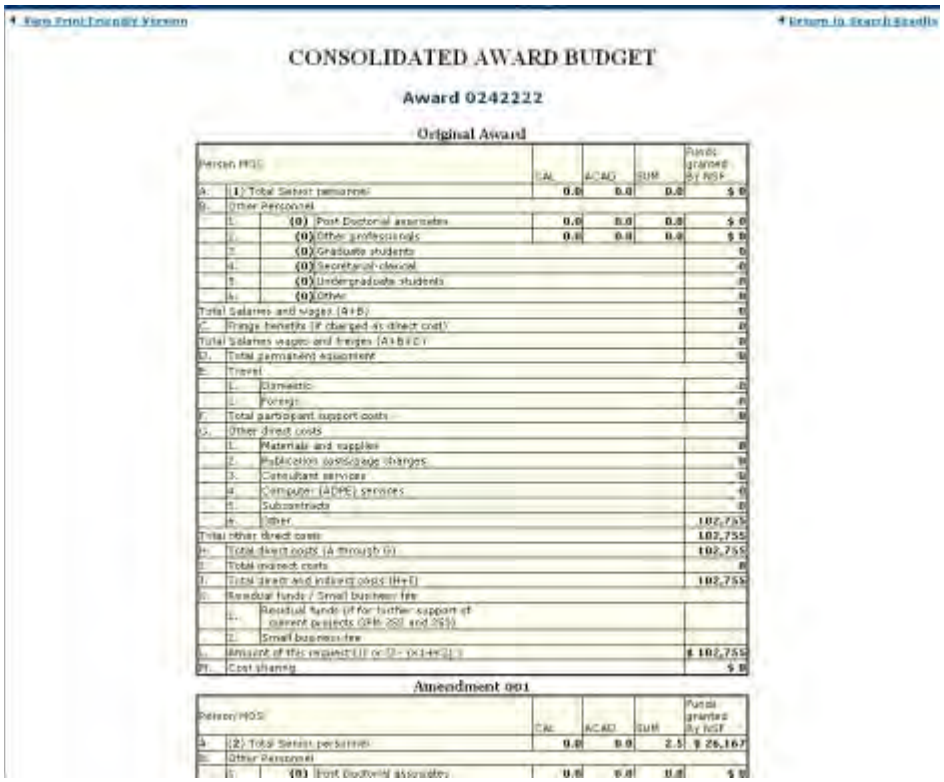
Figure 2 Current Amendment screen.

View the Original and Amended Budgets

1. Access the **Cooperative Agreement** screen (Figure 1) (see View a Cooperative Agreement).

Figure 1 Cooperative Agreement screen. The Budget link is circled.

2. On the **Cooperative Agreement** screen (Figure 1), click **Budget**. The **Consolidated Award Budget** screen displays (Figure 2) with the original award budget and the budget for each amendment.



CONSOLIDATED AWARD BUDGET

Award 0242222

Original Award

Person MOS	CAL	ACAD	SUM	Funds granted by NSF
A. (1) Total Senior personnel	0.0	0.0	0.0	$ 0
B. Other Personnel				
1. (0) Post Doctoral associates	0.0	0.0	0.0	$ 0
2. (0) Other professionals	0.0	0.0	0.0	$ 0
3. (0) Graduate students				0
4. (0) Secretarial-clerical				0
5. (0) Undergraduate students				0
6. (0) Other				0
Total Salaries and wages (A+B)				0
C. Fringe benefits (if charged as direct cost)				0
Total Salaries wages and fringes (A+B+C)				0
D. Total permanent equipment				0
E. Travel				
1. Domestic				0
2. Foreign				0
F. Total participant support costs				0
G. Other direct costs				
1. Materials and supplies				0
2. Publication costs/page charges				0
3. Consultant services				0
4. Computer (ADPE) services				0
5. Subcontracts				0
6. Other				102,755
Total other direct costs				102,755
H. Total direct costs (A through G)				102,755
I. Total indirect costs				0
J. Total direct and indirect costs (H+I)				102,755
K. Residual funds / Small business fee				
1. Residual funds (if for further support of current projects GPG 250 and 255)				
2. Small business fee				
L. Amount of this request (J or J+ (K1+K2))				$ 102,755
M. Cost sharing				$ 0

Amendment 001

Person MOS	CAL	ACAD	SUM	Funds granted by NSF
A. (2) Total Senior personnel	0.0	0.0	2.5	$ 26,167
B. Other Personnel				
1. (0) Post Doctoral associates	0.0	0.0	0.0	$ 0

Figure 2 Consolidated Award Budget screen with the original award budget and the budget for each amendment.

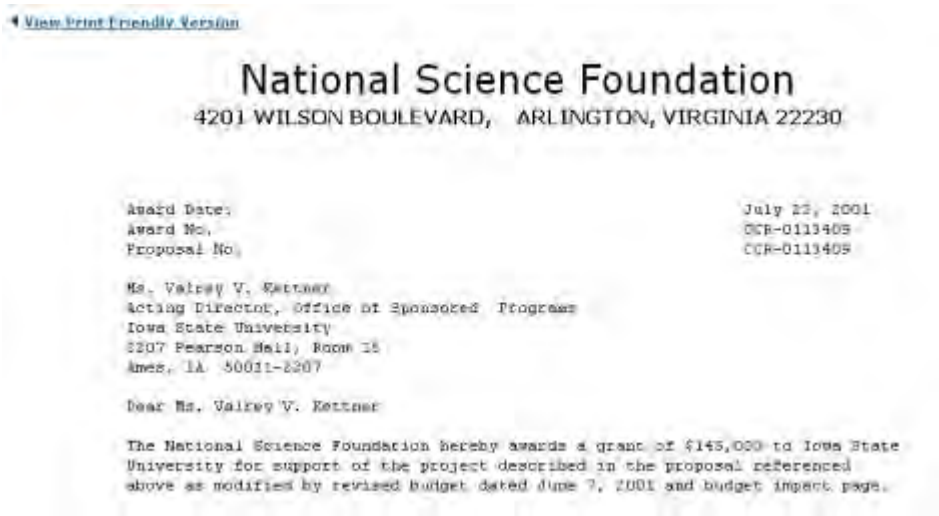
View the Prior Award

Only PIs can view a prior award.

1. Access the **Cooperative Agreement** screen (Figure 1) (see View a Cooperative Agreement).

Figure 1 Cooperative Agreement screen. The Prior Award link is circled.

2. On the **Cooperative Agreement** screen (Figure 1), click **Prior Award**. The **National Science Foundation** screen displays (Figure 2) with the text of the last award letter.


View Print Friendly Version

National Science Foundation
4201 WILSON BOULEVARD, ARLINGTON, VIRGINIA 22230

Award Date: July 23, 2001
Award No. CCR-0113409
Proposal No. CCR-0113409

Ms. Valrey V. Kettner
Acting Director, Office of Sponsored Programs
Iowa State University
2207 Pearson Hall, Room 15
Ames, IA 50011-2207

Dear Ms. Valrey V. Kettner

The National Science Foundation hereby awards a grant of $145,000 to Iowa State University for support of the project described in the proposal referenced above as modified by revised budget dated June 7, 2001 and budget impact page.

Figure 2 National Science Foundation screen with the text of the last award letter.

3. To print the award letter, click **View Print-Friendly Version** (Figure 2). A print-friendly version of the award letter displays.
4. Click the **Print** command on your browser to print the document.

View the Award Document in PDF Format

1. Access the **Cooperative Agreement** screen (Figure 1) (see View a Cooperative Agreement).

Figure 1 Cooperative Agreement screen. The View Print-Friendly Version (PDF) link is circled.

2. On the **Cooperative Agreement** screen (Figure 1), click **View Print-Friendly Version (PDF)**. The Cooperative Agreement displays in PDF format in a new window (Figure 2). If you need Adobe Reader, see Adobe Reader for FastLane.

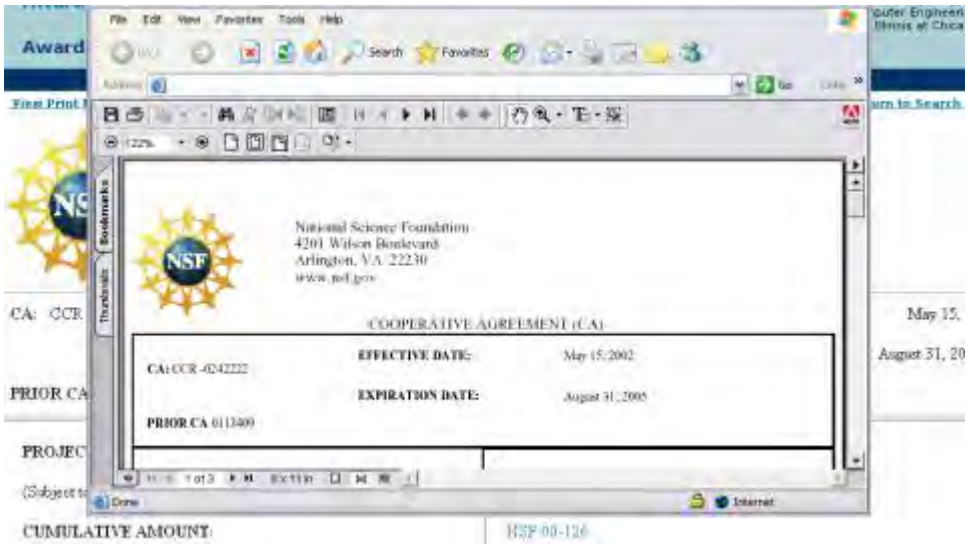


Figure 2 Cooperative Agreement in PDF format in a new window.

3. Click the **Print** icon on the PDF document browser (Figure 2) to print the PDF version of the Cooperative Agreement.
4. Close the PDF version window to return to the **Cooperative Agreement** screen (Figure 1).

View the Amendments to an Award

1. Access the **Award Documents** screen on the **Active Awards** tab (Figure 1). See one of the following:
   - View and Print Award Letters as a PI, Step 1 through Step 3
   - View and Print Award Letters as an SPO/AOR, Step 1 and Step 2

   If an award has amendments, on the **Award Documents** screen, a **Yes** displays in the **Amendments** column on the row for the award.

Figure 1 Award Documents screen on the Active Awards tab. The Yes link is circled for an award.

2. Click **Yes** (Figure 1) in the row for the award whose amendments you want to view. The **List of Active Amendments** screen displays (Figure 2) with a listing of all the amendments for that award.

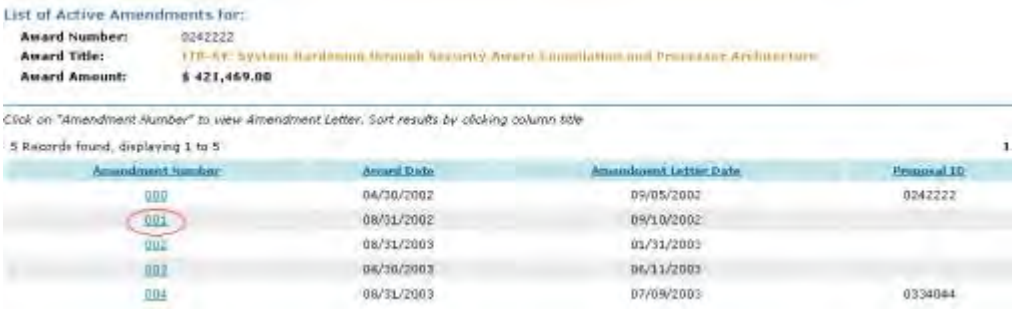


Figure 2 List of Active Amendments screen. The amendment number is circled.

3. Click an amendment number (Figure 2) to view that amendment. The **Amendment** screen displays (Figure 3) with a link for you to view the amendment.

Figure 3 Amendment screen with a link to that amendment.

View Documents for Expired Awards

View Award Documents for Expired Awards

1. Access the **Award Documents** screen on the **Active Awards** tab (Figure 1). See either one of the following:
   - View and Print Award Documents as a PI, Step 1 through Step 3
   - View and Print Award Documents as an SPO/AOR, Step 1 and Step 2

Figure 1 Award Documents screen on the Active Awards tab. The Expired Awards tab is circled.

2. On the **Award Documents** screen on the **Active Awards** tab (Figure 1), click the **Expired Awards** tab. The **Award Documents** screen displays on the **Expired Awards** tab (Figure 2) with a listing of the expired awards for which you can view the award letters. You have two options on this screen:
   - View award letters for an expired award
   - View amendments for an expired award

Figure 2 Award Documents screen on the Expired Awards tab.

View Award Documents for Expired Awards

1. Access the **Award Documents** screen on the **Active Awards** tab (Figure 1). See either one of the following:
   - View and Print Award Documents as a PI, Step 1 through Step 3
   - View and Print Award Documents as an SPO/AOR, Step 1 and Step 2

Figure 1 Award Documents screen on the Active Awards tab. The Expired Awards tab is circled.

2. On the **Award Documents** screen on the **Active Awards** tab (Figure 1), click the **Expired Awards** tab. The **Award Documents** screen displays on the **Expired Awards** tab (Figure 2) with a listing of the expired awards for which you can view the award letters. You have two options on this screen:
   - View award letters for an expired award
   - View amendments for an expired award

Figure 2 Award Documents screen on the Expired Awards tab.

View Award Letters for Expired Awards

1. Access the **Award Documents** screen on the **Expired Awards** tab (Figure 1) (see View Award Documents for Expired Awards).

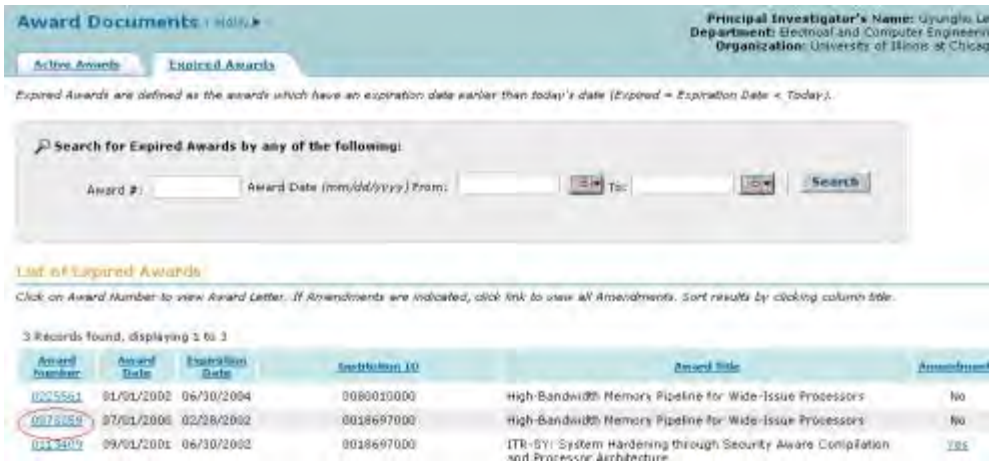


Figure 1 Award Documents screen on the Expired Awards tab. The award number is circled for an award.

2. On the **Award Documents** screen on the **Expired Awards** tab (Figure 1), click the award number on the row for the award whose letter you want to view. The **National Science Foundation** screen displays (Figure 2) with the text of the latest award letter.

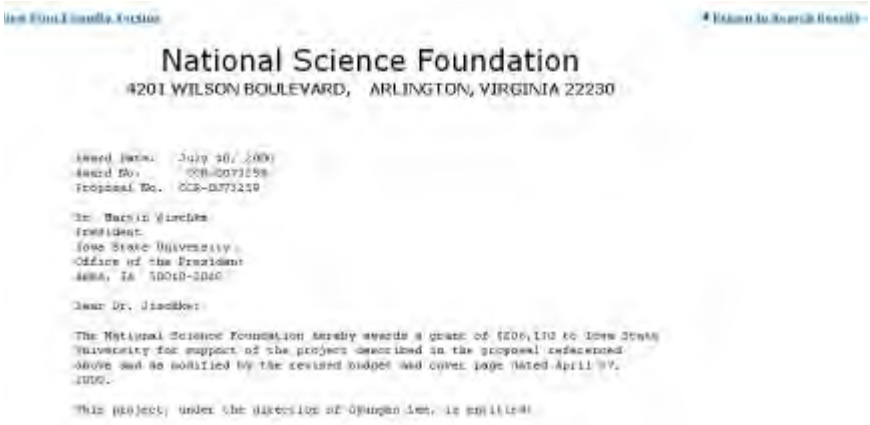


Figure 2 National Science Foundation screen with the text of the latest award letter.

Note: If the expired award is a Cooperative Agreement that was established after March 2005, the **Cooperative Agreement** screen displays. See View a Cooperative Agreement for the options in viewing Cooperative Agreements.

View Amendments for Expired Awards

1. Access the **Award Documents** screen on the **Expired Awards** tab (Figure 1) (see View Award Documents for Expired Awards). *If an award has amendments*, on the **Award Documents** screen on the **Expired Awards** tab, a **Yes** displays in the **Amendments** column on the row for the award.

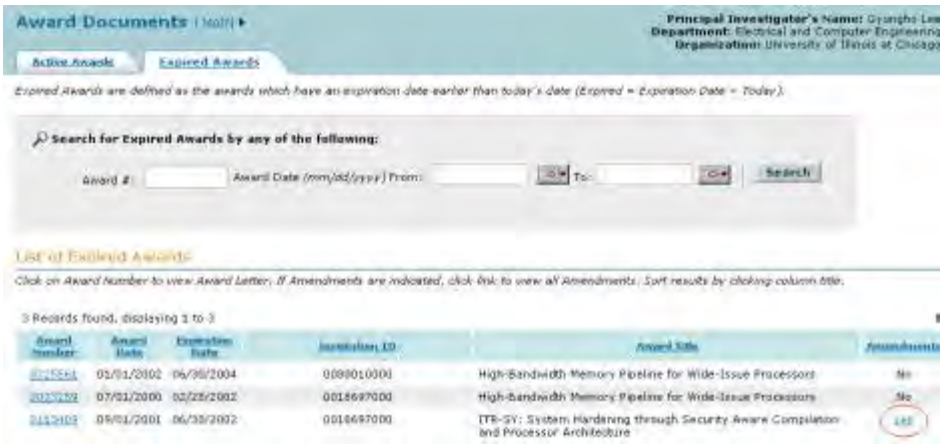


Figure 1 Award Documents screen on the Expired Awards tab. The Yes link is circled for an expired award.

2. Click **Yes** (Figure 1) on the row for the award whose amendments you want to view. The **List of Expired Amendments** screen displays (Figure 2) for that award.

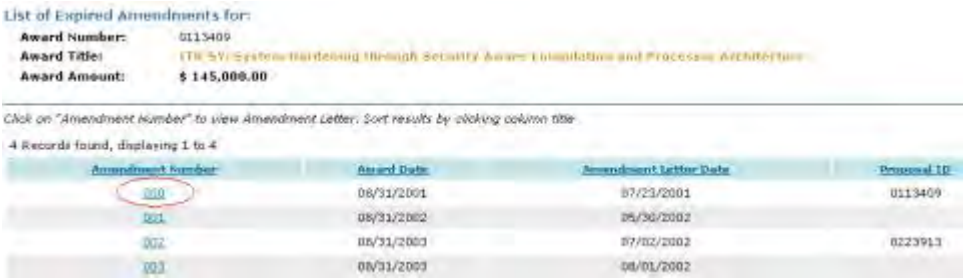


Figure 2 List of Expired Amendments screen. The Amendment Number is circled.

3. Click an amendment number (Figure 2). The **National Science Foundation** screen displays (Figure 3) with the amendment text.

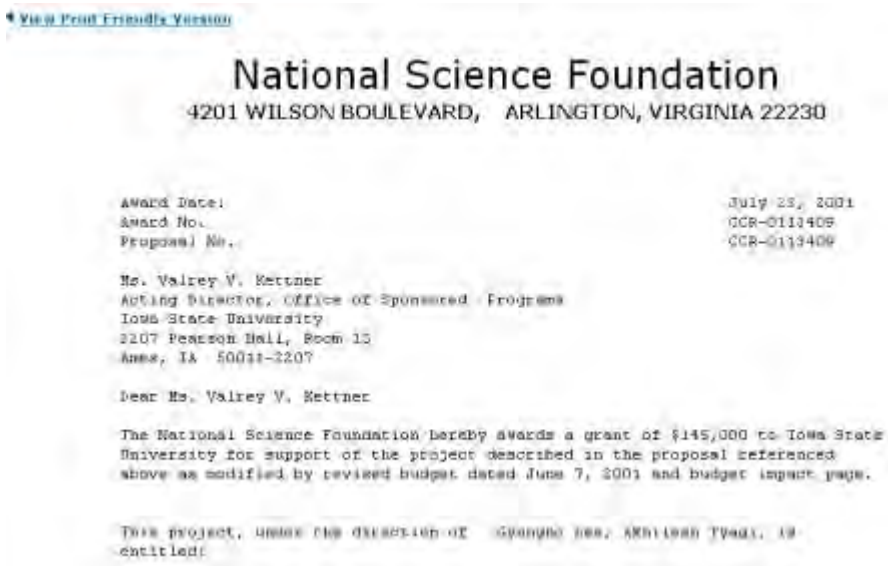


Figure 3 National Science Foundation screen with the amendment text.

Supplemental Funding Request

Supplemental Funding Request Introduction

Print the contents of the Supplemental Funding Request book.

In unusual circumstances, an organization may request small amounts of supplemental funding and up to 6 months of additional support, if this funding is necessary for completion of the project.

To obtain this additional support, you must submit a Supplemental Funding Request via FastLane at least 2 months before the additional funds are required.

You request must include:

- A summary of the proposed work
- A justification of the need for the supplemental funds
- A budget that highlights the use by budget category of the additional funding as distinguished from the original funding

The Authorized Organizational Representative (AOR) must sign the Supplementary Funding Request.

If the request is approved, the NSF Grants Officer amends the grant.

See the *Proposal & Award Policies & Procedures Guide (PAPPG)* Chapter VI.E.4 for greater detail on Supplemental Funding Requests.

As a Principal Investigator (PI), you can do the following:

- Prepare a Supplemental Funding Request
- Give the SPO access to the Supplemental Funding Request

As an SPO, you can do the following:

- Check a Supplemental Funding Request
- Edit a Supplemental Funding Request
- Submit a Supplemental Funding Request (AOR only)
- Withdraw a Supplemental Funding Request (AOR only)

As an AOR, you must sign a Supplemental Funding Request (see AOR Functions).

Click on a link above for instructions for that action.

Supplemental Funding Request Introduction

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See the *Proposal & Award Policies & Procedures Guide (PAPPG)* Chapter VI.E.4 for greater detail on Supplemental Funding Requests.

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- Prepare a Supplemental Funding Request
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As an SPO, you can do the following:

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- Edit a Supplemental Funding Request
- Submit a Supplemental Funding Request (AOR only)
- Withdraw a Supplemental Funding Request (AOR only)

As an AOR, you must sign a Supplemental Funding Request (see AOR Functions).

Click on a link above for instructions for that action.

PI Functions

PI Functions Introduction for a Supplemental Funding Request

As a PI, you have these options for working on a Supplementary Funding Request:

- Prepare a Supplementary Funding Request
- Edit a Supplementary Funding Request
- Allow or Remove SPO Access to a Supplementary Funding Request
- Print a Supplementary Funding Request
- Delete a Supplementary Funding Request

PI Functions Introduction for a Supplemental Funding Request

As a PI, you have these options for working on a Supplementary Funding Request:

- Prepare a Supplementary Funding Request
- Edit a Supplementary Funding Request
- Allow or Remove SPO Access to a Supplementary Funding Request
- Print a Supplementary Funding Request
- Delete a Supplementary Funding Request

Prepare a Supplemental Funding Request

1. On the **FastLane Home Page** screen, log in to Proposals, Awards, and Status as a PI (see PI Login). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management** screen displays (Figure 1).

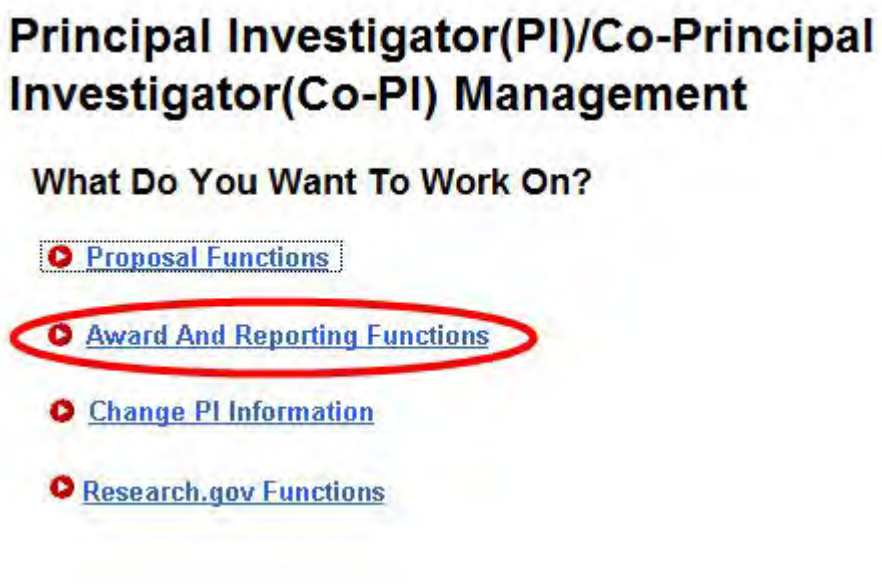

Figure 1 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management screen. The Award and Reporting Functions link is circled.

2. Click **Award and Reporting Functions** (Figure 1). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Award and Reporting Functions** screen displays (Figure 2).

Figure 2 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Award and Reporting screen. The Supplemental Funding Request link is circled.

3. Click **Supplemental Funding Request** (Figure 2). The **List of Current Awards** screen displays (Figure 3).

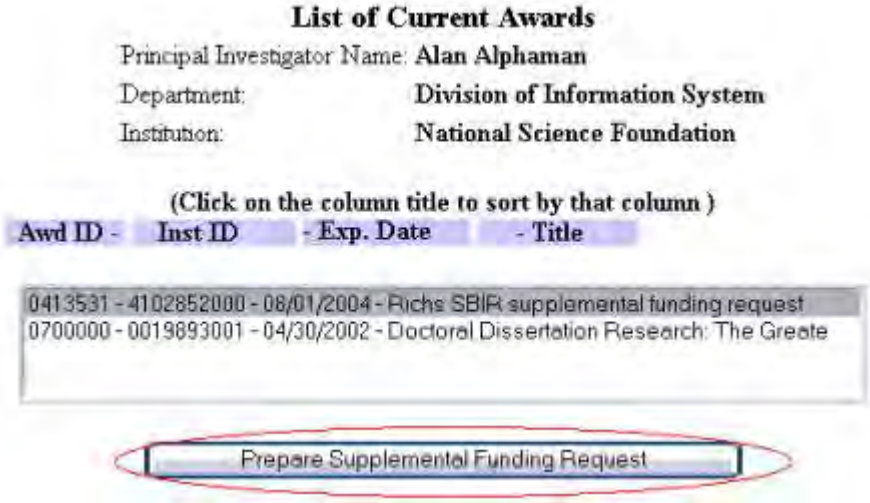

Figure 3 List of Current Awards screen. The Prepare Supplemental Funding Request button is circled.

4. Highlight the award for which you want to prepare a Supplemental Funding Request (Figure 3).
5. Click the **Prepare Supplemental Funding Request** button (Figure 3). The **Request for Supplemental Funding** screen displays (Figure 4).

Figure 4 Request for Supplemental Funding screen. The Create New Supplemental Funding Request screen is circled.

6. Click the **Create New Supplemental Funding Request** button (Figure 4). The **Form Preparation** screen displays (Figure 5) with the forms for preparing a Supplemental Funding Request:
    - Summary of Proposed Work
    - Budgets (Including Justification)
    - Add/Delete Non-Co-PI Senior Personnel
    - Justification for Supplement
    - Supplementary Documents
    - Revised End Date (if applicable)

    (Click on a form link for instructions on completing that form.)

Figure 5 Form Preparation screen.

Edit a Supplemental Funding Request

1. On the **FastLane Home Page** screen, log in to Proposals, Awards, and Status as a PI (see PI Login). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management** screen displays (Figure 1).

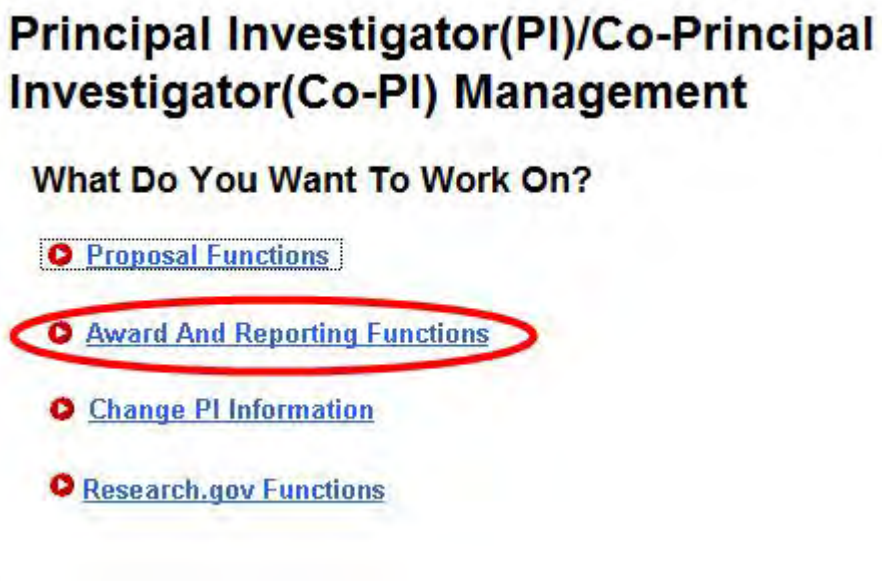

Figure 1 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management screen. The Award and Reporting Functions link is circled.

2. Click **Award and Reporting Functions** (Figure 1). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Award and Reporting Functions** screen displays (Figure 2).

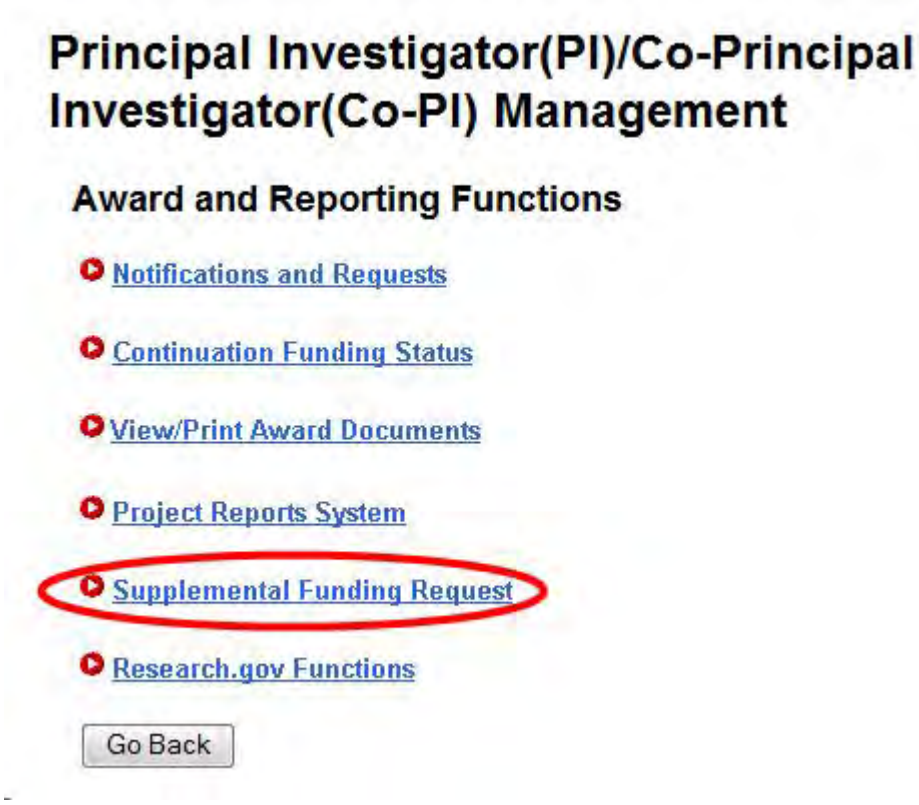

Figure 2 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Award and Reporting screen. The Supplemental Funding Request link is circled.

3. Click **Supplemental Funding Request** (Figure 2). The **List of Current Awards** screen displays (Figure 3).

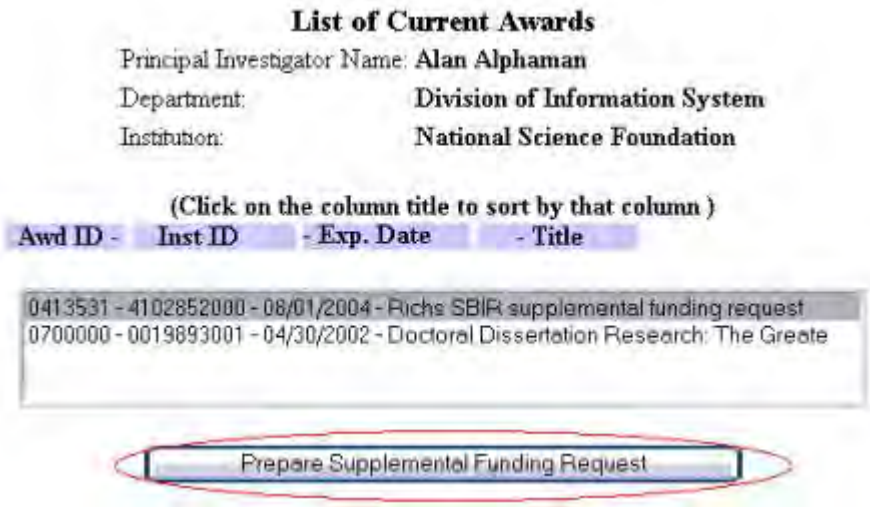

Figure 3 List of Current Awards screen. The Prepare Supplemental Funding Request button is circled.

4. Highlight the award for which you want to edit a Supplemental Funding Request (Figure 3).
5. Click the **Prepare Supplemental Funding Request** button (Figure 3). The **Request for Supplemental Funding** screen displays (Figure 4).

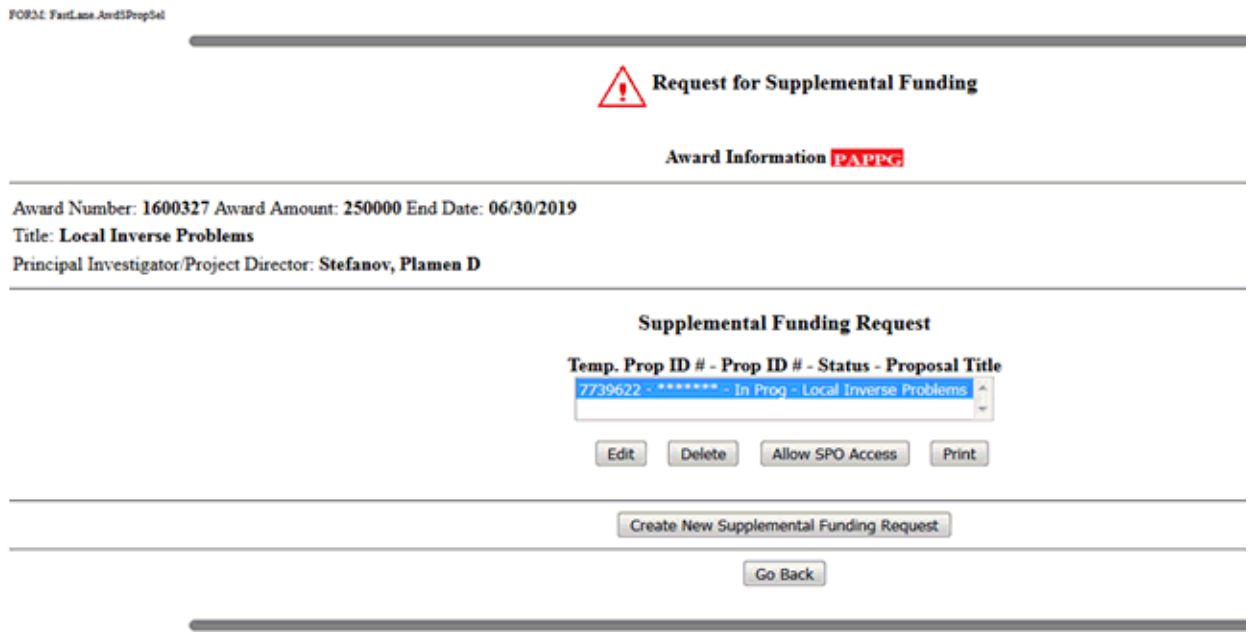

Figure 4 Request for Supplemental Funding screen. The Edit button is circled.

6. Highlight the Supplemental Funding Request you want to edit (Figure 4).
7. Click the **Edit** button (Figure 4). The **Form Preparation** screen displays (Figure 5).

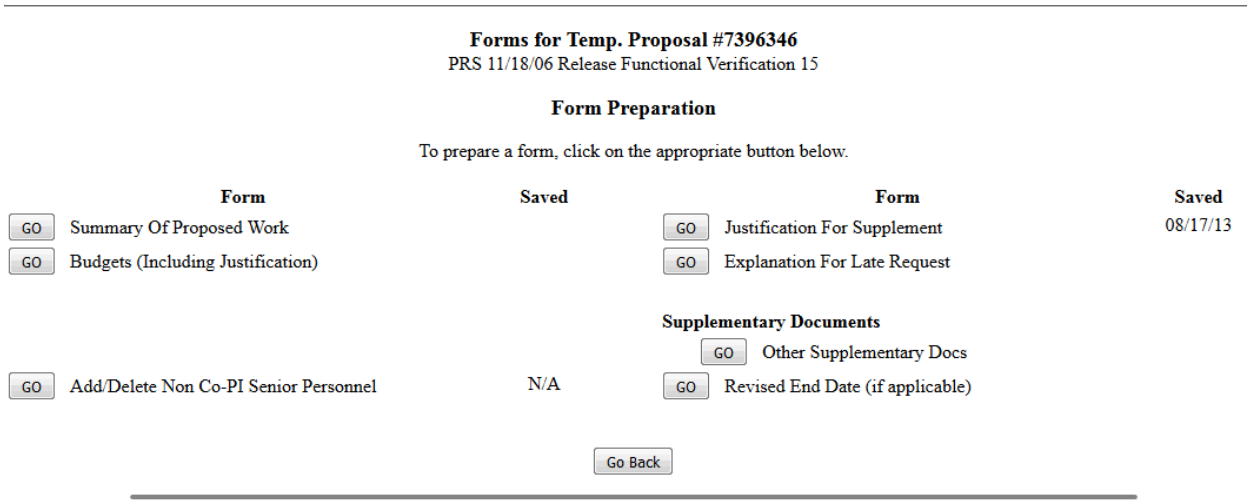

Figure 5 Form Preparation screen.

8. Edit the forms as you require:
   - Summary of Proposed Work
   - Budgets (Including Justification)

- Add/Delete Non-Co-PI Senior Personnel
- Justification for Supplement
- Supplementary Documents
- Revised End Date (if applicable)

(Click on a form above for instructions on completing that form.)

Allow or Remove SPO Access to Supplemental Funding Request

Allow or Remove SPO/AOR Access to a Supplemental Funding Request

1. On the **FastLane Home Page** screen, log in to Proposals, Awards, and Status as a PI (see PI Login). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management** screen displays (Figure 1).

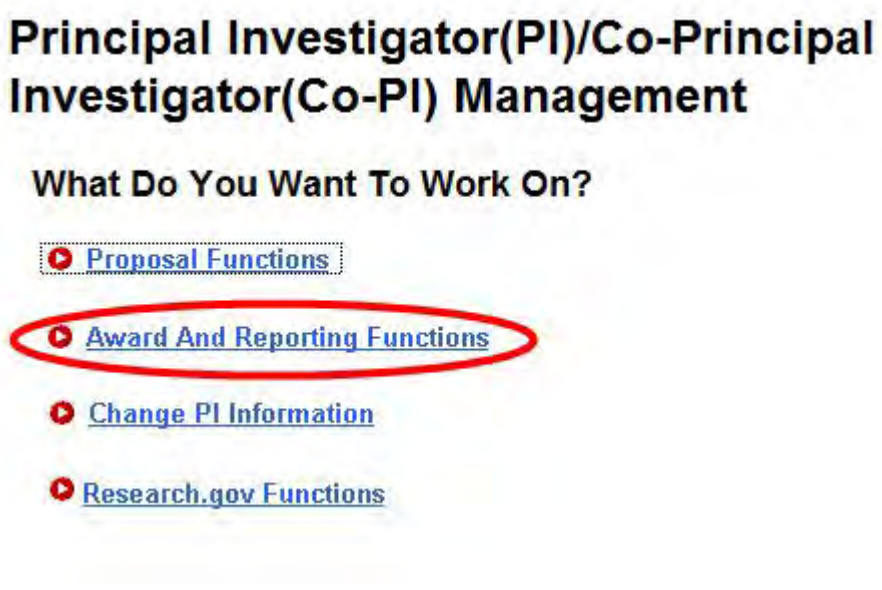

Figure 1 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management screen. The Award and Reporting Functions link is circled.

2. Click **Award and Reporting Functions** (Figure 1). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Award and Reporting Functions** screen displays (Figure 2).

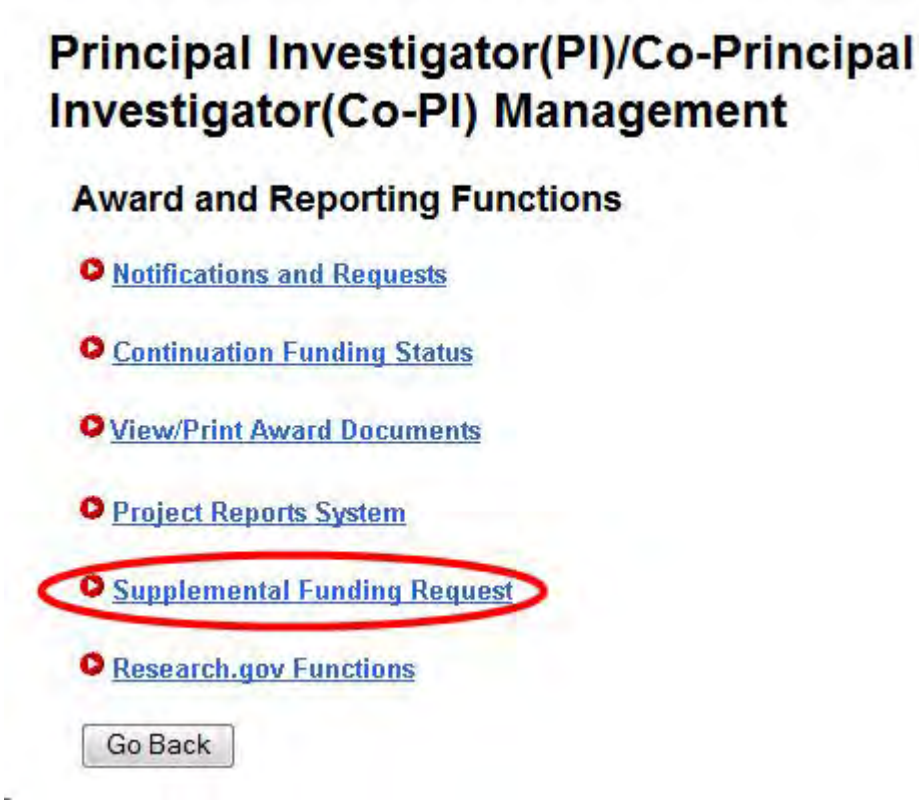

Figure 2 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Award and Reporting screen. The Supplemental Funding Request link is circled.

3. Click **Supplemental Funding Request** (Figure 2). The **List of Current Awards** screen displays (Figure 3).

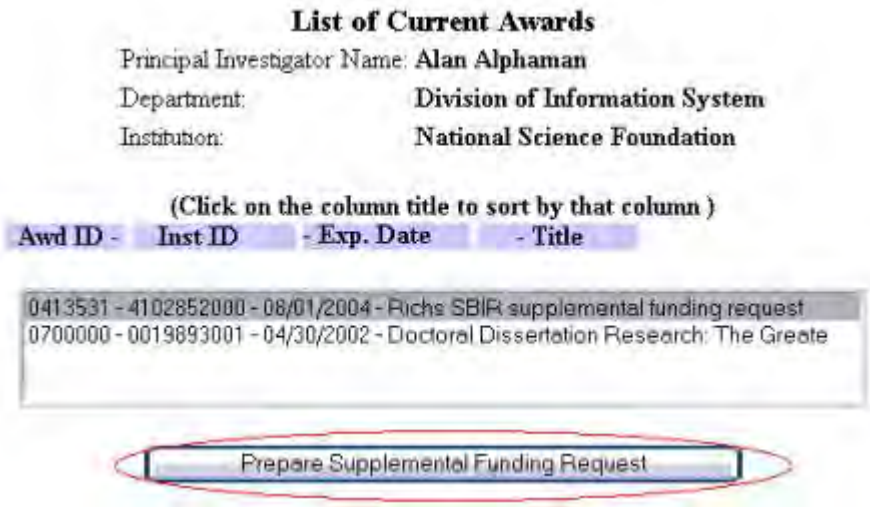

Figure 3 List of Current Awards screen. The Prepare Supplemental Funding Request button is circled.

4. Highlight the award for which you want to give the SPO access to a Supplemental Funding Request (Figure 3).
5. Click the **Prepare Supplemental Funding Request** button (Figure 3). The **Request for Supplemental Funding** screen displays (Figure 4).

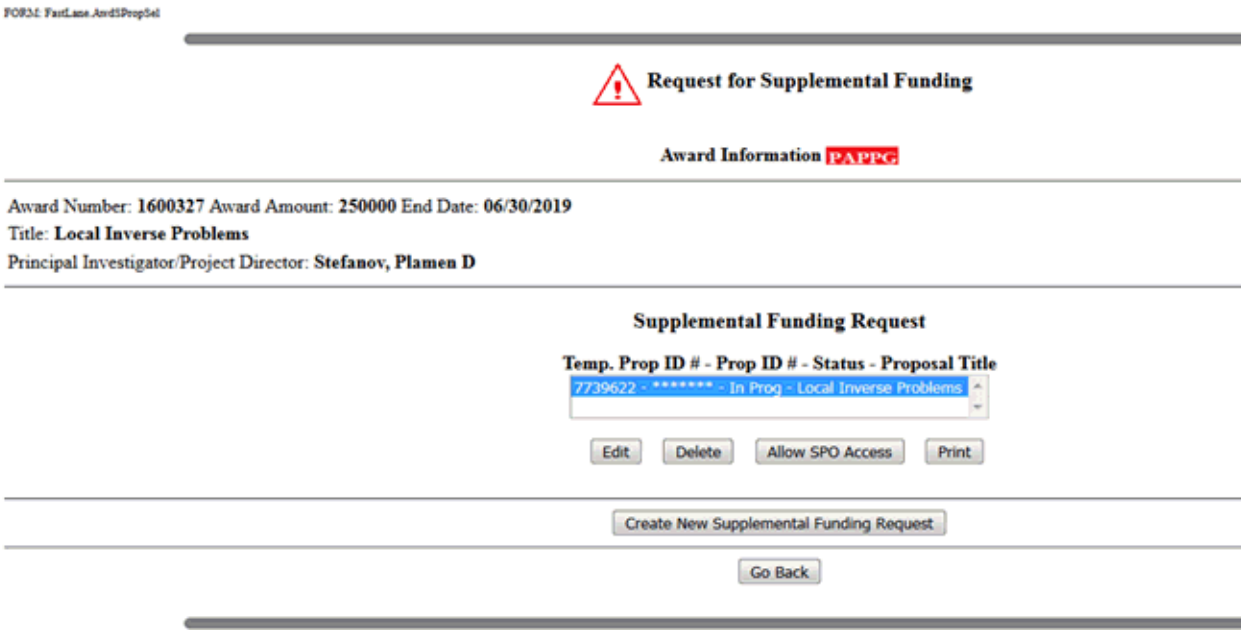

Figure 4 Supplemental Funding Request screen. The Allow SPO Access button is circled.

6. Highlight the Supplemental Funding Request that you want to give the SPO access to (Figure 4).
7. Click the **Allow SPO Access** button (Figure 4). The **Sponsored Project Office (SPO) Access Control** screen displays (Figure 5) with these control options:
   - Allow SPO to view proposal
   - Allow SPO to view and edit proposal
   - Allow AOR to view, edit, and submit proposal

   (Click on a link above for instructions for that option.)

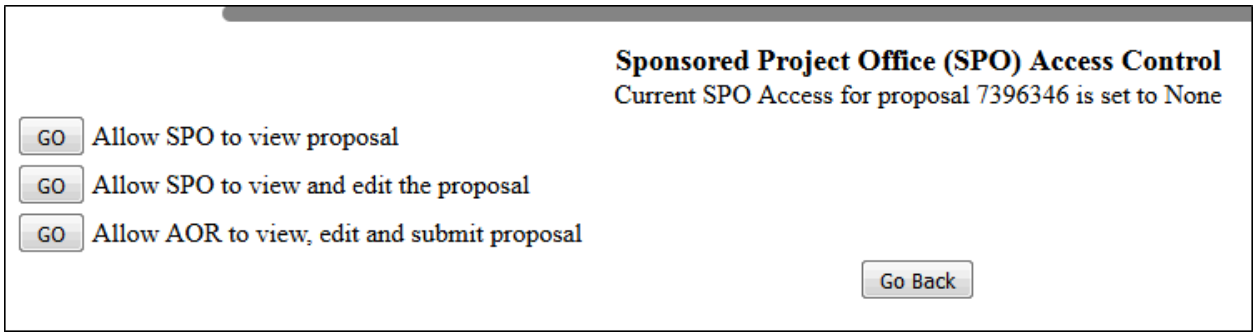

Figure 5 Sponsored Project Office (SPO) Access Control screen.

Allow or Remove SPO/AOR Access to a Supplemental Funding Request

1. On the **FastLane Home Page** screen, log in to Proposals, Awards, and Status as a PI (see PI Login). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management** screen displays (Figure 1).

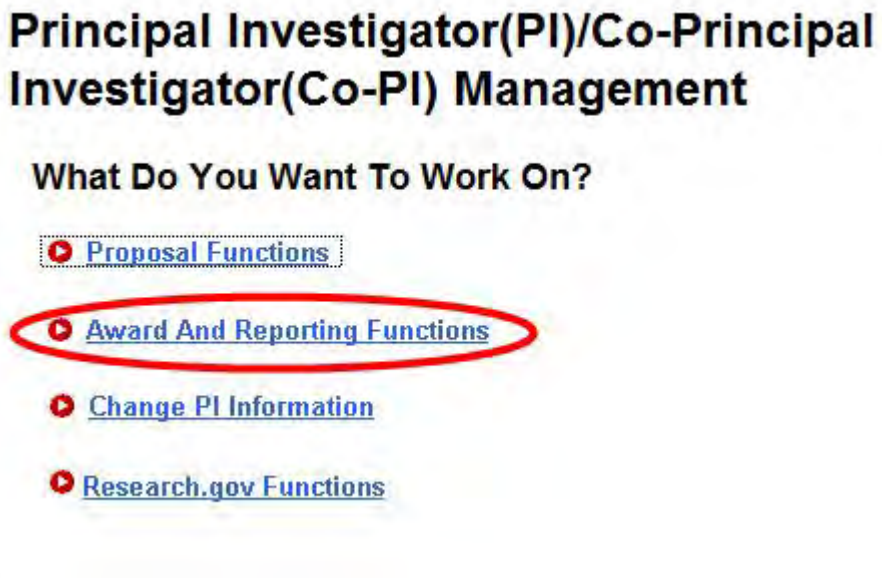

Figure 1 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management screen. The Award and Reporting Functions link is circled.

2. Click **Award and Reporting Functions** (Figure 1). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Award and Reporting Functions** screen displays (Figure 2).

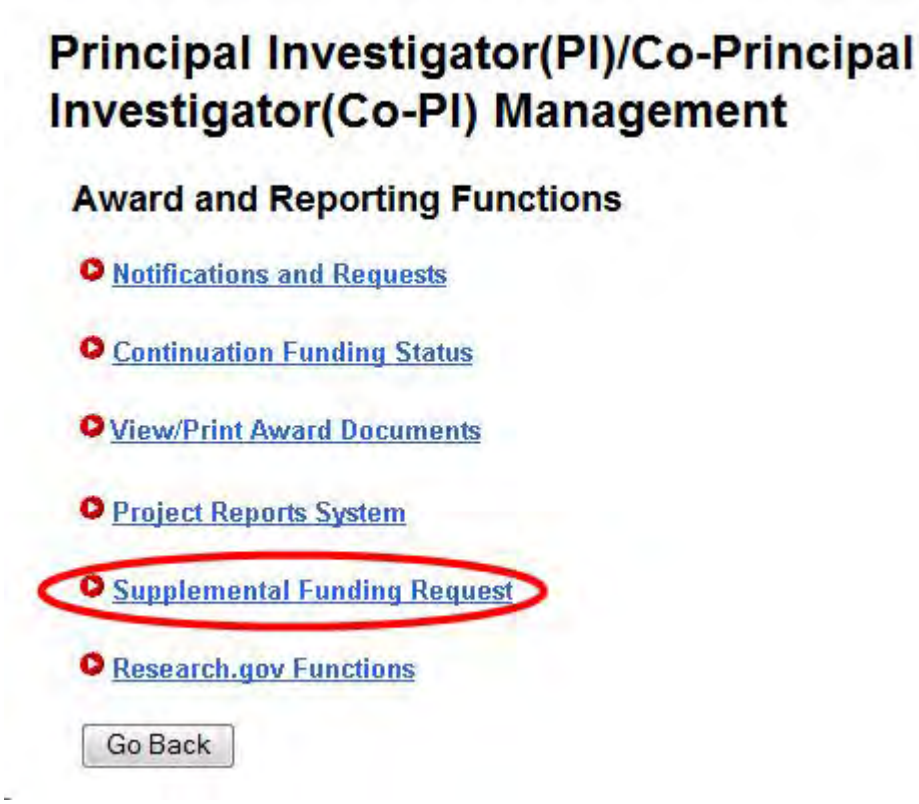

Figure 2 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Award and Reporting screen. The Supplemental Funding Request link is circled.

3. Click **Supplemental Funding Request** (Figure 2). The **List of Current Awards** screen displays (Figure 3).

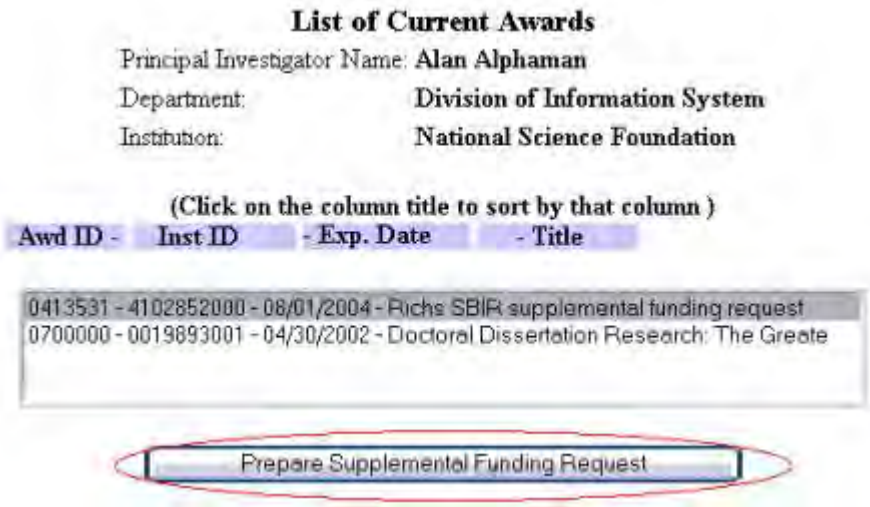

Figure 3 List of Current Awards screen. The Prepare Supplemental Funding Request button is circled.

4. Highlight the award for which you want to give the SPO access to a Supplemental Funding Request (Figure 3).
5. Click the **Prepare Supplemental Funding Request** button (Figure 3). The **Request for Supplemental Funding** screen displays (Figure 4).

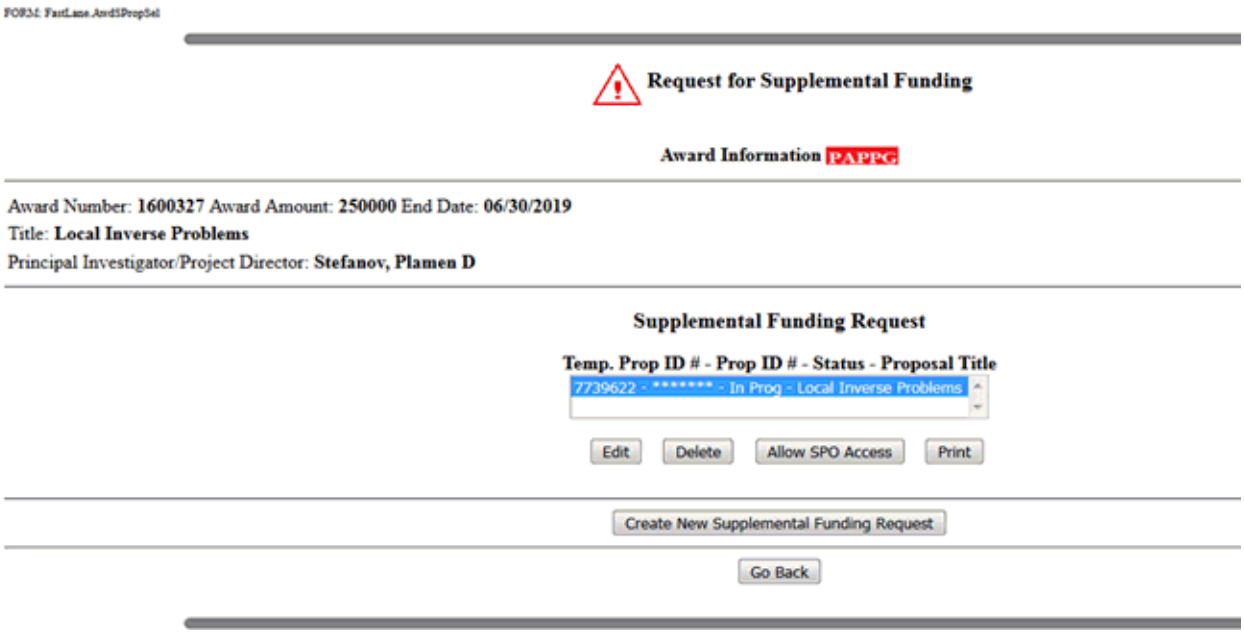

Figure 4 Supplemental Funding Request screen. The Allow SPO Access button is circled.

6. Highlight the Supplemental Funding Request that you want to give the SPO access to (Figure 4).
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   - Allow SPO to view proposal
   - Allow SPO to view and edit proposal
   - Allow AOR to view, edit, and submit proposal

   (Click on a link above for instructions for that option.)

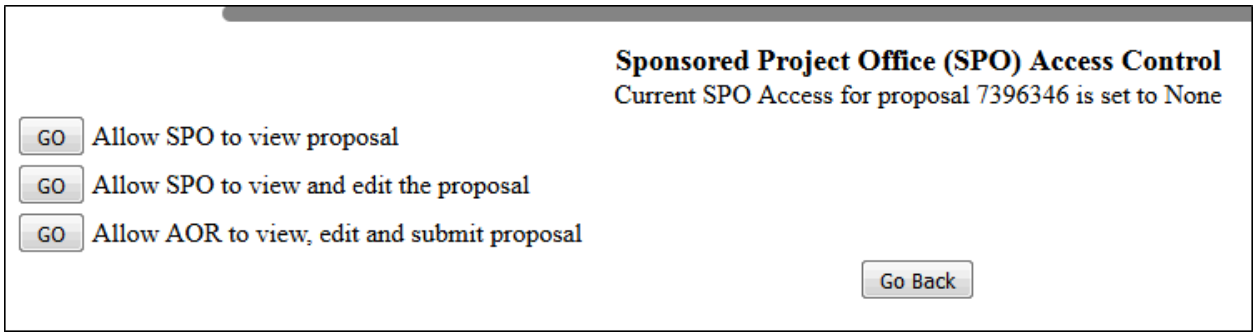

Figure 5 Sponsored Project Office (SPO) Access Control screen.

Allow SPO to View But Not Submit a Supplemental Funding Request

1. Access the **Sponsored Project Office (SPO) Access Control** screen (Figure 1) (see Allow or Remove SPO Access to a Supplemental Funding Request).

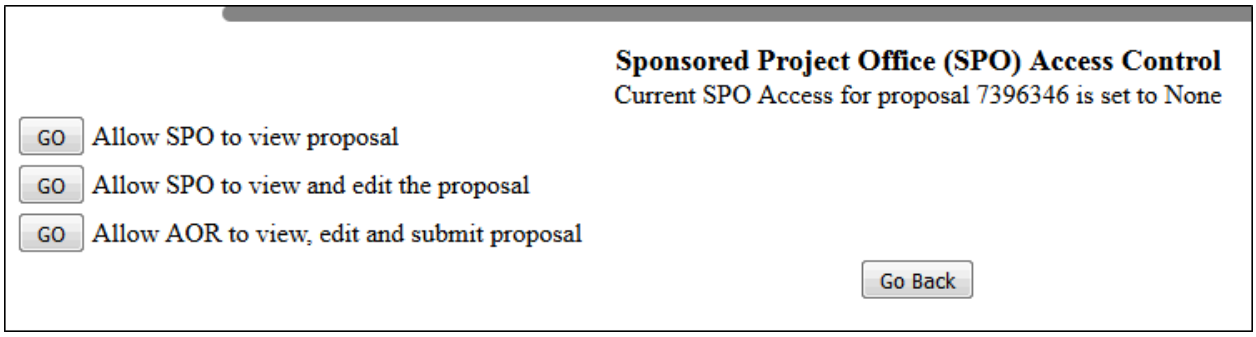

Figure 1 Sponsored Project Office Access Control screen. The Go button for Allow SPO to Only View Proposal But Not Submit is circled.

2. On the **Sponsored Project Office (SPO) Access Control** screen (Figure 1), click the **Go** button for Allow SPO to Only View Proposal But Not Submit. A screen displays (Figure 2) with a message that the SPO can now view but not edit or submit the Supplemental Funding Request.

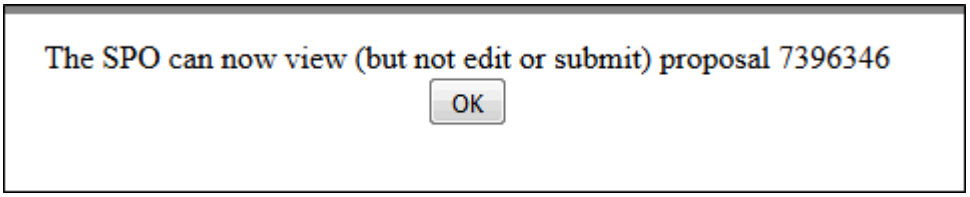

Figure 2 Screen with the message that the SPO can now view but not edit or submit the Supplemental Funding Request.

3. Click the **OK** button (Figure 2). The **Request for Supplemental Funding** screen displays.

Allow SPO to View and Edit But Not Submit a Supplemental Funding Request

1. Access the **Sponsored Project Office (SPO) Access Control** screen (Figure 1) (see Allow or Remove SPO Access to a Supplemental Funding Request).

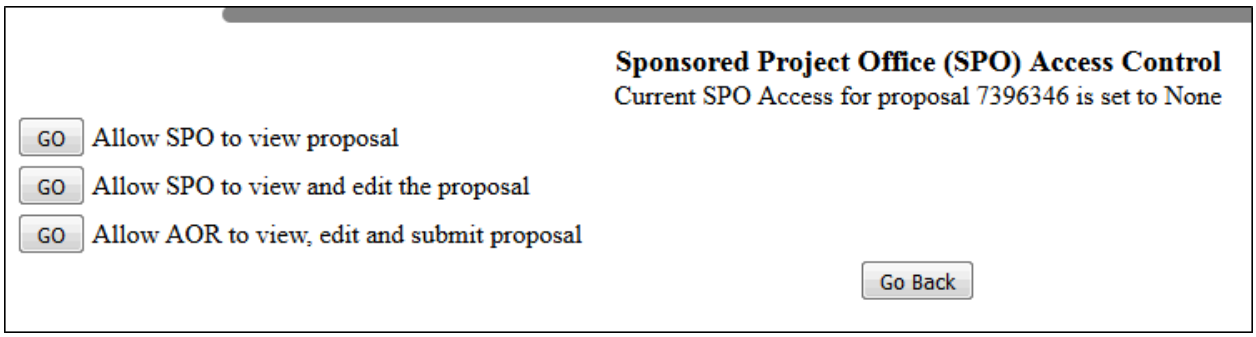

Figure 1 Sponsored Project Office (SPO) Access Control screen.

2. On the **Sponsored Project Office (SPO) Access Control** screen (Figure 1), click the **Go** button for Allow SPO to View and Edit But Not Submit Proposal. A screen displays (Figure 2) with a message that the SPO can now view and edit but not submit the Supplemental Funding Request.

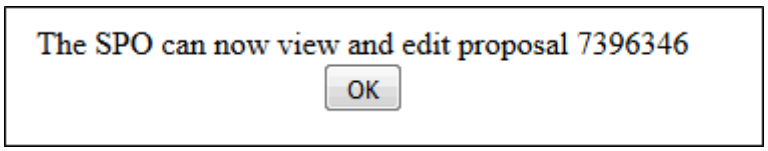

Figure 2 Screen with the message that the SPO can now view and edit the proposal.

3. Click the **OK** button (Figure 2). The **Request for Supplemental Funding** screen displays.

Allow AOR to View, Edit, and Submit a Supplemental Funding Request

1. Access the **Sponsored Project Office (SPO) Access Control** screen (Figure 1) (see Allow or Remove SPO Access to a Supplemental Funding Request).

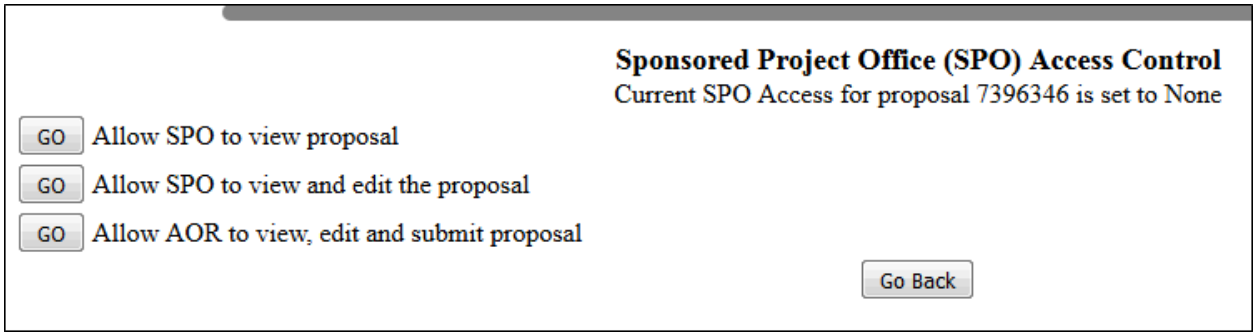

Figure 1 Sponsored Project Office (SPO) Access Control screen.

2. On the **Sponsored Project Office (SPO) Access Control** screen (Figure 1), click the **Go** button for Allow AOR to View, Edit, and Submit Proposal. A screen displays (Figure 2) with a message that the AOR now has full access to the request. The screen also lists the individuals who will receive emails from FastLane on the request's new access status.

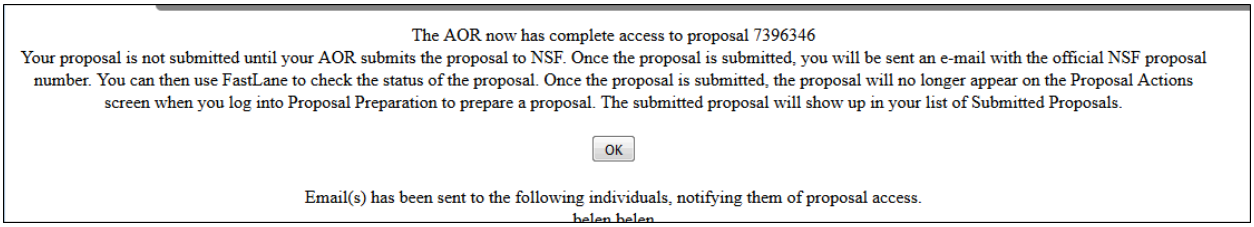

Figure 2 Screen with the message that the AOR now has full access to the Supplemental Funding Request and with the list of people NSF will notify of the AOR's access. The OK button is circled.

3. Click the **OK** button (Figure 2). The **Request for Supplemental Funding** screen displays.

Remove SPO/AOR Access to a Supplemental Funding Request

1. Access the **Sponsored Research Office (SPO) / AOR Access Control** screen (Figure 1) (see Allow or Remove SPO Access to a Supplemental Funding Request).

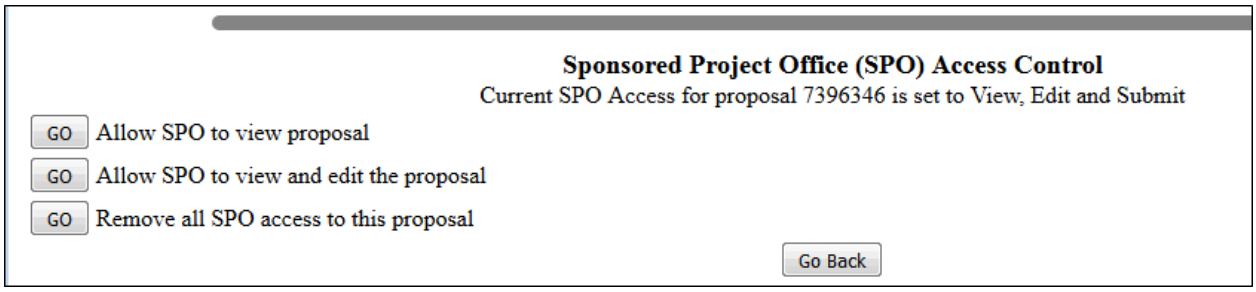

Figure 1 Sponsored Project Office (SPO) Access Control screen.

2. On the **Sponsored Project Office (SPO) Access Control** screen (Figure 1), click the **Go** button for Remove All SPO Access to This Proposal. A screen displays (Figure 2) with the message that SPO access to the request is blocked.

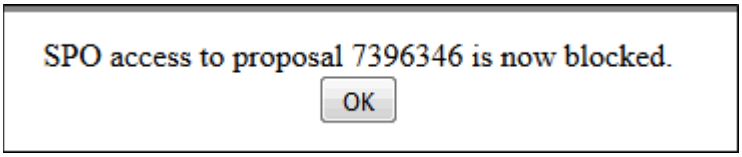

Figure 2 Screen with the message that SPO access to the request is blocked.

3. Click the **OK** button (Figure 2). The **Request for Supplemental Funding** screen displays.

Print a Supplemental Funding Request

1. On the **FastLane Home Page** screen, log in to Proposals, Awards, and Status as a PI (see PI Login). The **Principal Investigator (PI) / Co-Principal Investigator (Co-PI) Management** screen displays (Figure 1).

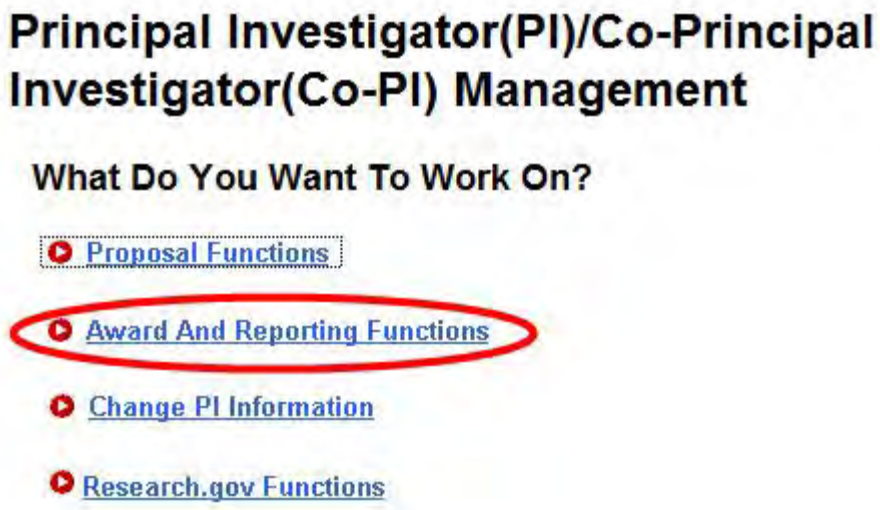

Figure 1 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management screen. The Award and Reporting Functions link is circled.

2. Click **Award and Reporting Functions** (Figure 1). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Award and Reporting Functions** screen displays (Figure 2).

Figure 2 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Award and Reporting screen. The Supplemental Funding Request link is circled.

3. Click **Supplemental Funding Request** (Figure 2). The **List of Current Awards** screen displays (Figure 3).

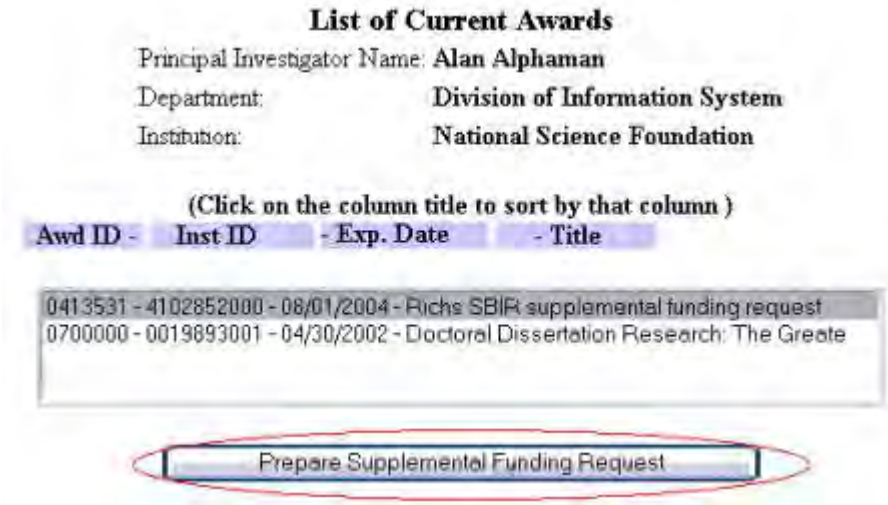

Figure 3 List of Current Awards screen. The Prepare Supplemental Funding Request button is circled.

4. Highlight the award for which you want to print a Supplementary Funding Request (Figure 3).
5. Click the **Prepare Supplemental Funding Request** button (Figure 3). The **Request for Supplemental Funding** screen displays (Figure 4).

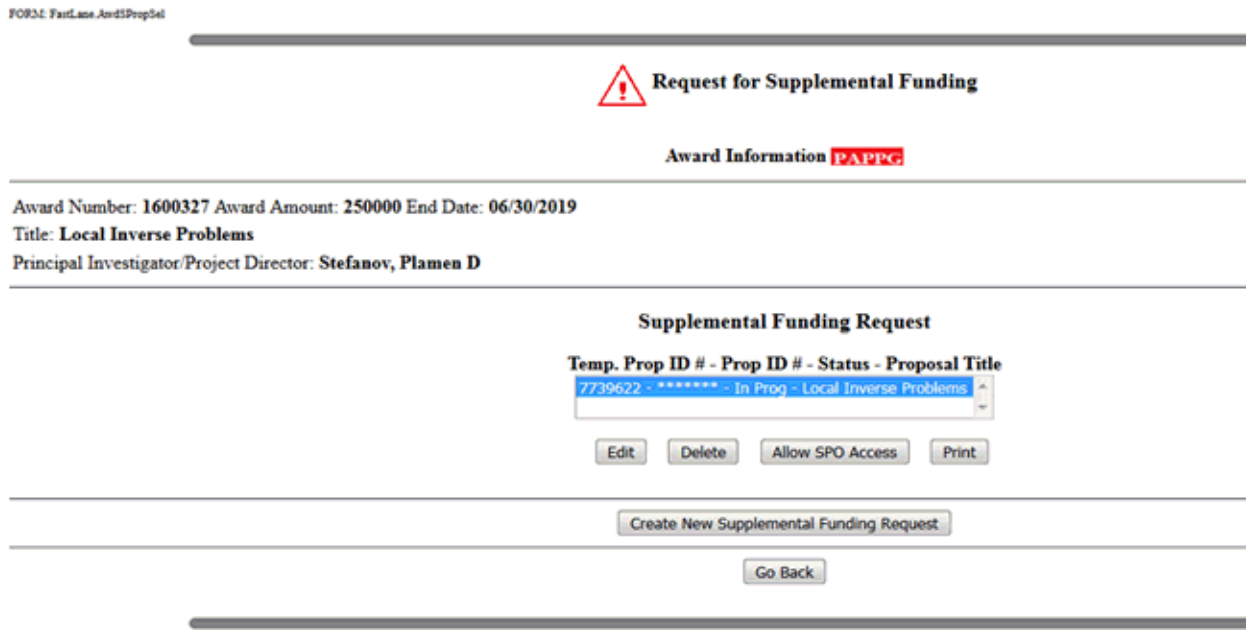

Figure 4 Request for Supplemental Funding screen. The Print button is circled.

6. Highlight the Supplemental Funding Request you want to print (Figure 4).
7. Click the **Print** button (Figure 4). The **Print Menu** screen displays (Figure 5).

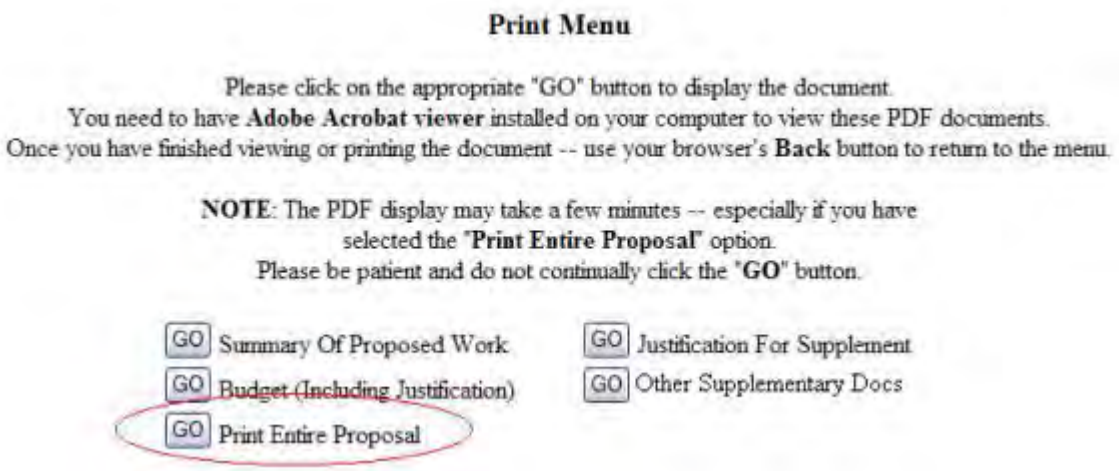

Figure 5 Print Menu screen. The Go button for Print Entire Proposal is circled.

8. Click the **Go** button for Print Entire Proposal (Figure 5). The Supplemental Funding Request displays in PDF format. If you need to download Adobe Reader, see Adobe Reader for FastLane.
9. Click the **Print** icon in the top left of the PDF screen to print the Supplemental Funding Request.

Delete a Supplemental Funding Request

1. On the **FastLane Home Page** screen, log in to Proposals, Awards, and Status as a PI (see PI Login). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management** screen displays (Figure 1).

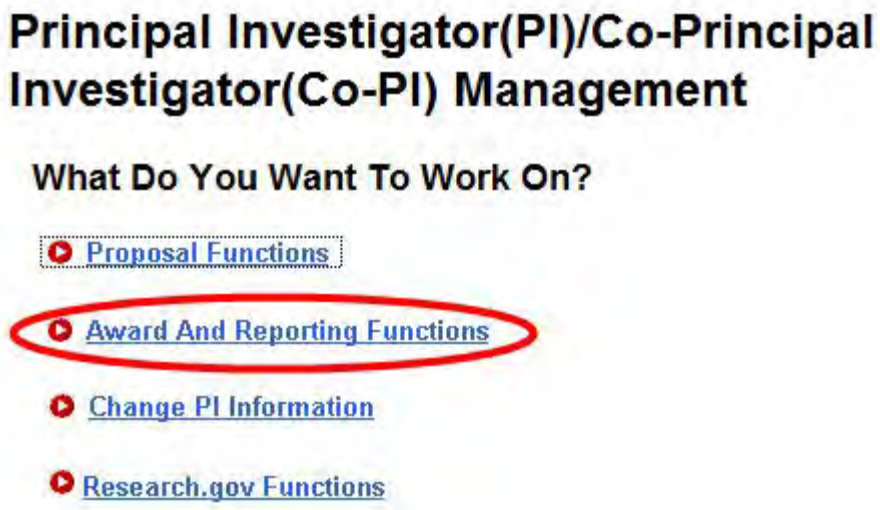

Figure 1 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management screen. The Award and Reporting Functions link is circled.

2. Click **Award and Reporting Functions** (Figure 1). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Award and Reporting Functions** screen displays (Figure 2).

Figure 2 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Award and Reporting screen. The Supplemental Funding Request link is circled.

3. Click **Supplemental Funding Request** (Figure 2). The **List of Current Awards** screen displays (Figure 3).

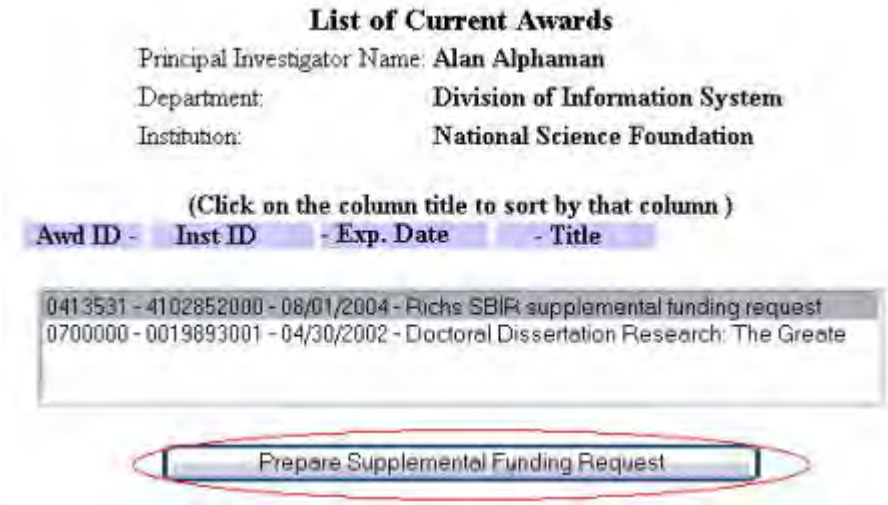

Figure 3 List of Current Awards screen. The Prepare Supplemental Funding Request button is circled.

4. Highlight the award for which you want to delete a Supplemental Funding Request (Figure 3).
5. Click the **Prepare Supplemental Funding Request** button (Figure 3). The **Request for Supplemental Funding** screen displays (Figure 4).

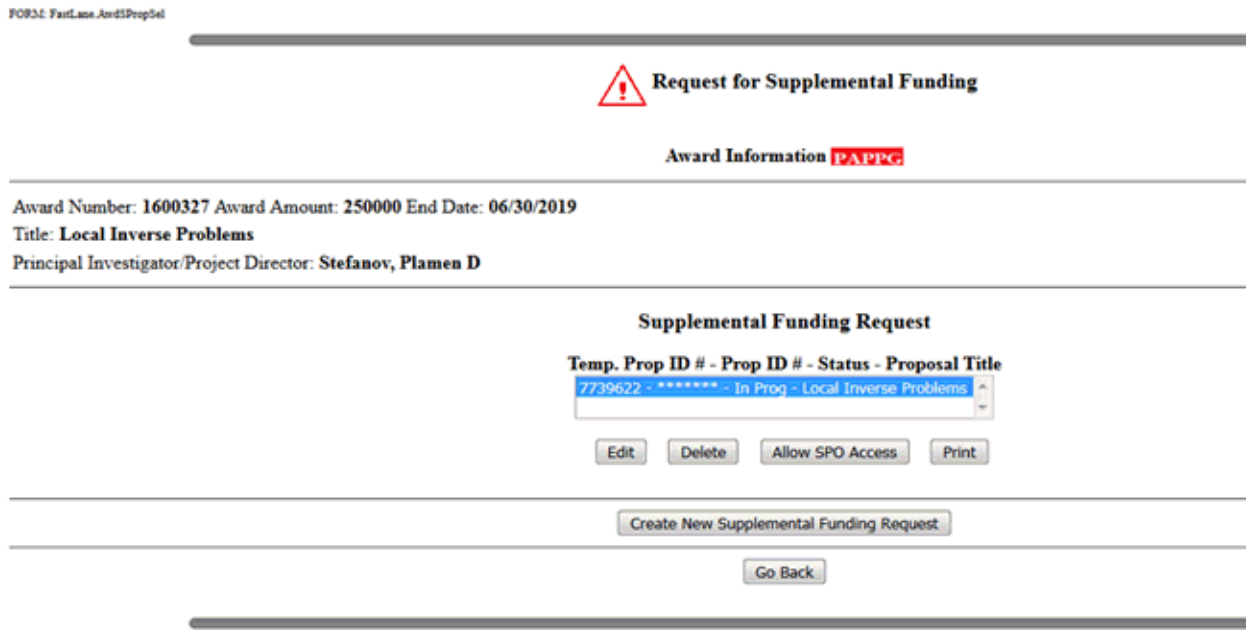

Figure 4 Request for Supplemental Funding screen. The Delete button is circled.

6. Highlight the Supplemental Funding Request you want to delete (Figure 4).
7. Click the **Delete** button (Figure 4). A screen displays (Figure 5) with a message for you to confirm that you want to delete the request.

Figure 5 Screen with a message for you to confirm that you want to delete the request.

8. Click the **OK** button (Figure 5). A screen displays (Figure 6) with a message that the Supplemental Funding Request has been deleted.

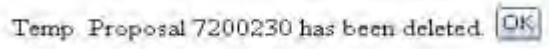

Figure 6 Screen with the message that the Supplemental Funding Request has been deleted.

9. Click the **OK** button. The **Request for Supplemental Funding** screen displays (Figure 4).

SPO Functions

Work on a Supplemental Funding Request as an SPO

1. On the **FastLane Home Page** screen, log in to Research Administration as an SPO (see SPO Login). The **Research Administration** screen displays (Figure 1).

Figure 1 Research Administration screen. The Proposals/Supplements/File Updates/Withdrawals link is circled.

2. Click **Proposals/Supplements/File Updates/Withdrawals** (Figure 1). The **Proposals/Supplements/File Updates/Withdrawals** screen displays on the **Documents in Progress** tab (Figure 2) with a listing of all your organization's documents in progress. Supplemental Funding Requests are categorized as Supplements in the **Type** column.

Figure 2 Proposals/Supplements/File Updates/Withdrawals screen on the Documents in Progress tab. The award number for a Supplemental Funding Request is circled.

3. Click the **Type** column heading to group all the Supplemental Funding Requests. On the **Proposals, Supplements/File Updates/Withdrawals** screen, you have these options:
   - Check a Supplementary Funding Request

- Edit a Supplementary Funding Request
- View/Print a Supplementary Funding Request
- Return a Supplementary Funding Request to the PI
- Submit a Supplementary Funding Request to NSF(AOR only)
- Withdraw a Supplementary Funding Request from NSF(AOR only)

(Click on a link above for instructions for that option.)

Work on a Supplemental Funding Request as an SPO

1. On the **FastLane Home Page** screen, log in to Research Administration as an SPO (see SPO Login). The **Research Administration** screen displays (Figure 1).

Figure 1 Research Administration screen. The Proposals/Supplements/File Updates/Withdrawals link is circled.

2. Click **Proposals/Supplements/File Updates/Withdrawals** (Figure 1). The **Proposals/Supplements/File Updates/Withdrawals** screen displays on the **Documents in Progress** tab (Figure 2) with a listing of all your organization's documents in progress. Supplemental Funding Requests are categorized as Supplements in the **Type** column.

Figure 2 Proposals/Supplements/File Updates/Withdrawals screen on the Documents in Progress tab. The award number for a Supplemental Funding Request is circled.

3. Click the **Type** column heading to group all the Supplemental Funding Requests. On the **Proposals, Supplements/File Updates/Withdrawals** screen, you have these options:
   - Check a Supplementary Funding Request
   - Edit a Supplementary Funding Request
   - View/Print a Supplementary Funding Request
   - Return a Supplementary Funding Request to the PI
   - Submit a Supplementary Funding Request to NSF(AOR only)
   - Withdraw a Supplementary Funding Request from NSF(AOR only)

   (Click on a link above for instructions for that option.)

Check a Supplemental Funding Request

1. Access the **Proposals/Supplements/File Updates/Withdrawals** screen on the **Documents in Progress** tab (Figure 1) (see Work on a Supplemental Funding Request).

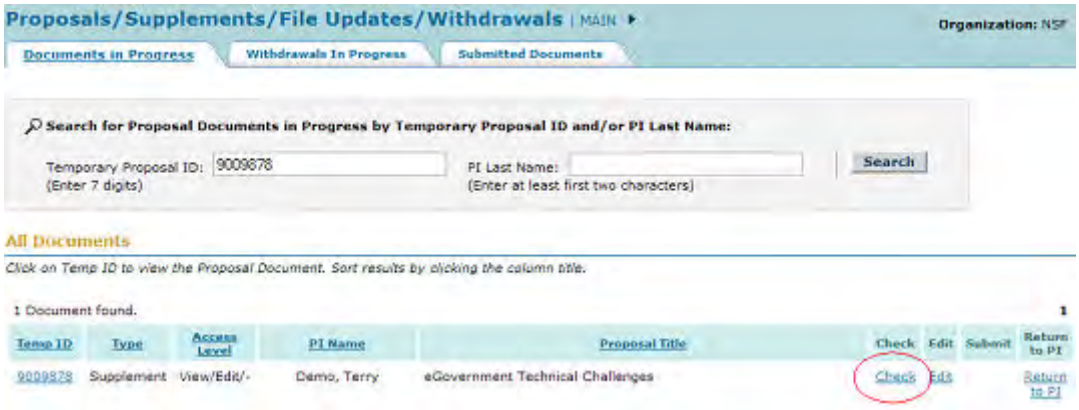

Figure 1 Proposals/Supplements/File Updates/Withdrawals screen on the Documents in Progress tab. The Check link is circled.

2. On the **Proposals / Supplements / File Updates / Withdrawals** screen on the **Documents in Progress** tab (Figure 1), click **Check** on the row for the Supplement Funding Request you want to check. The **Proposals Errors / Warnings** screen is displayed with a list of proposal items that have not been completed.

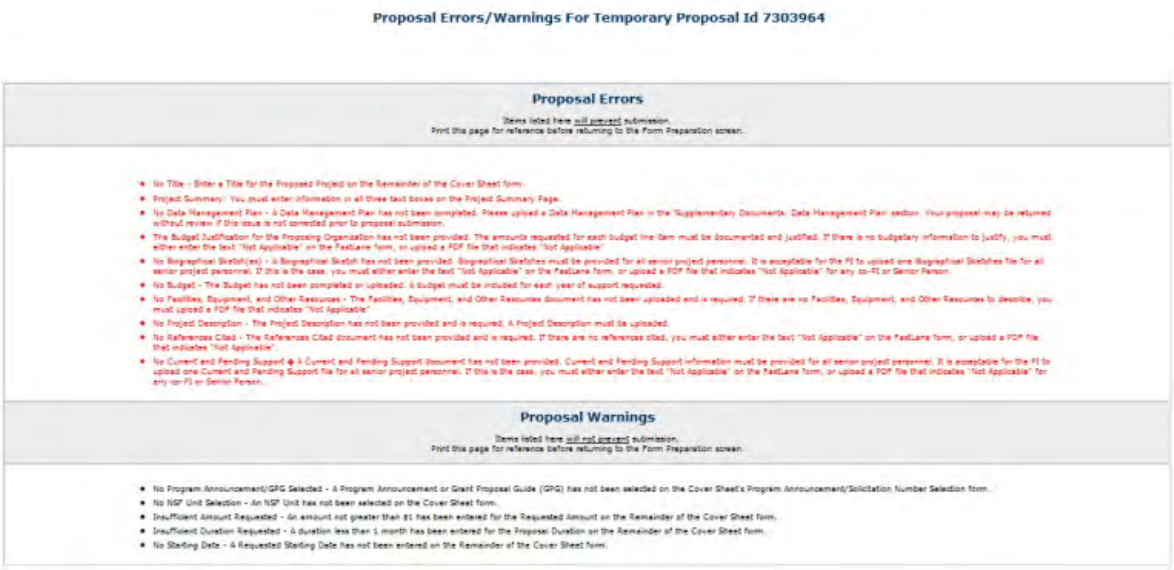

Figure 2 Proposals Errors / Warnings screen.

3. Click the **Return To List** link (Figure 2). The **Proposals / Supplements / File Updates / Withdrawals** screen displays on the **Documents in Progress** tab (Figure 1).

Edit a Supplemental Funding Request as an SPO/AOR

1. Access the **Proposals / Supplements / File Updates / Withdrawals** screen on the **Documents in Progress** tab (Figure 1) (see Work on a Supplemental Funding Request).

Figure 1 Proposals / Supplements / File Updates / Withdrawals screen on the Documents in Progress tab. The Edit link is circled.

2. On the **Proposals / Supplements / File Updates / Withdrawals** screen on the **Documents in Progress** tab (Figure 1), click **Edit** on the row for the Supplemental Funding Request you want to edit. The **Form Preparation** screen displays (Figure 2) with the forms for editing a Supplemental Funding Request:
   - Summary of Proposed Work
   - Budgets (Including Justification)
   - Add/Delete Non-Co-PI Senior Personnel
   - Justification for Supplement
   - Supplementary Documents
   - Revised End Date (if applicable)

   (Click on a form link for instructions on completing that form.)

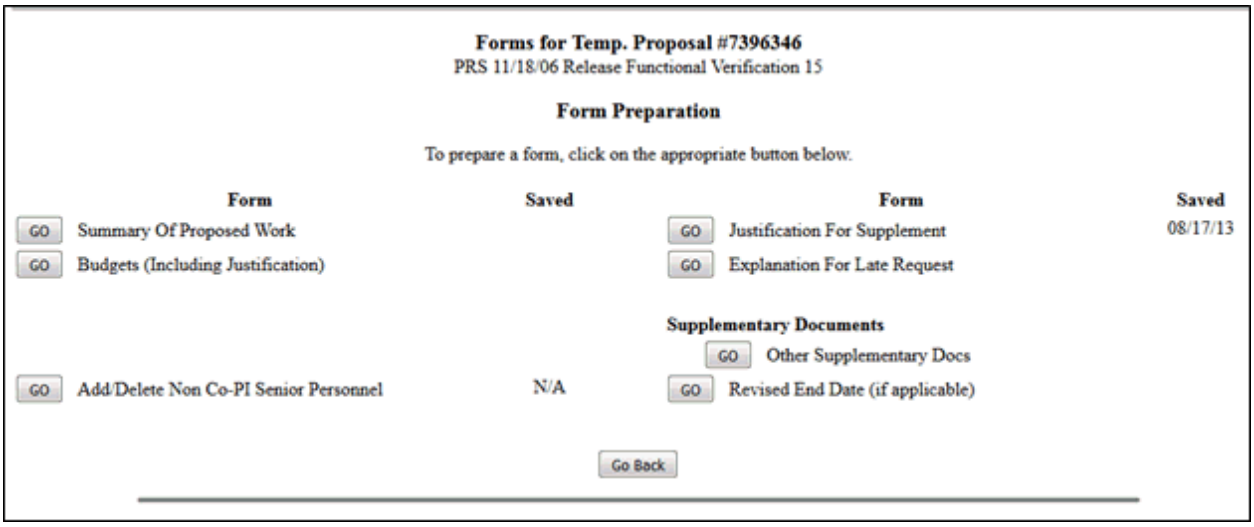

Figure 2 Form Preparation screen.

View/Print a Supplemental Funding Request

1. Access the **Proposals / Supplements / File Updates / Withdrawals** screen on the **Documents in Progress** tab (Figure 1) See Work on a Supplemental Funding Request).

Figure 1 Proposals / Supplements / File Updates / Withdrawals screen on the Documents in Progress tab. The award number for a Supplemental Funding Request is circled.

2. On the **Proposals / Supplements / File Updates / Withdrawals** screen on the **Documents in Progress** tab (Figure 1), click the award number on the row for the Supplemental Funding Request you want to view. The **View Proposal** screen displays (Figure 2).

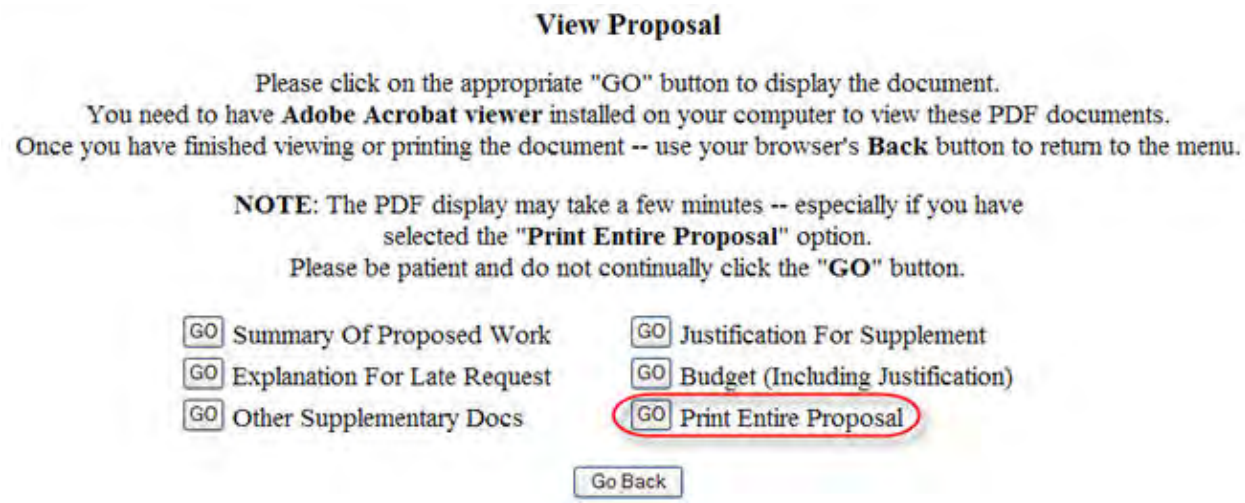

Figure 2 View Proposal screen. The Go button for Print Entire Proposal is circled.

3. Click the **Go** button for any form to view that form (Figure 2).
4. To print the entire Supplemental Funding Request, on the **View Proposal** screen, click the **Go** button (Figure 2) for Print the Entire Proposal. FastLane concatenates the forms and displays the Supplemental Funding Request in PDF format. If you need Adobe Reader, see Adobe Reader for FastLane.
5. On the PDF screen, click the **Printer** icon in the upper left of the screen. The Supplemental Funding Request prints in PDF format.
6. Click the browser back button to return to the **View Proposal** screen (Figure 2).

Submit a Supplemental Funding Request (AOR only)

1. Access the **Proposals / Supplements / File Updates / Withdrawals** screen (Figure 1) (see Work on a Supplemental Funding Request).

Figure 1 Proposals/Supplements/File Updates/Withdrawals screen on the Documents in Progress tab. The Submit link is circled.

2. On the **Proposals/Supplements/File Updates/Withdrawals** screen on the **Documents in Progress** tab (Figure 1), click **Submit** on the row for the Supplemental Funding Request that you want to submit to NSF. The **Proposals Errors/Warnings** screen displays (Figure 2) with the Cover Sheet for the request (Figure 2) and the **Debarment and Suspension Certification** section (Figure 3).

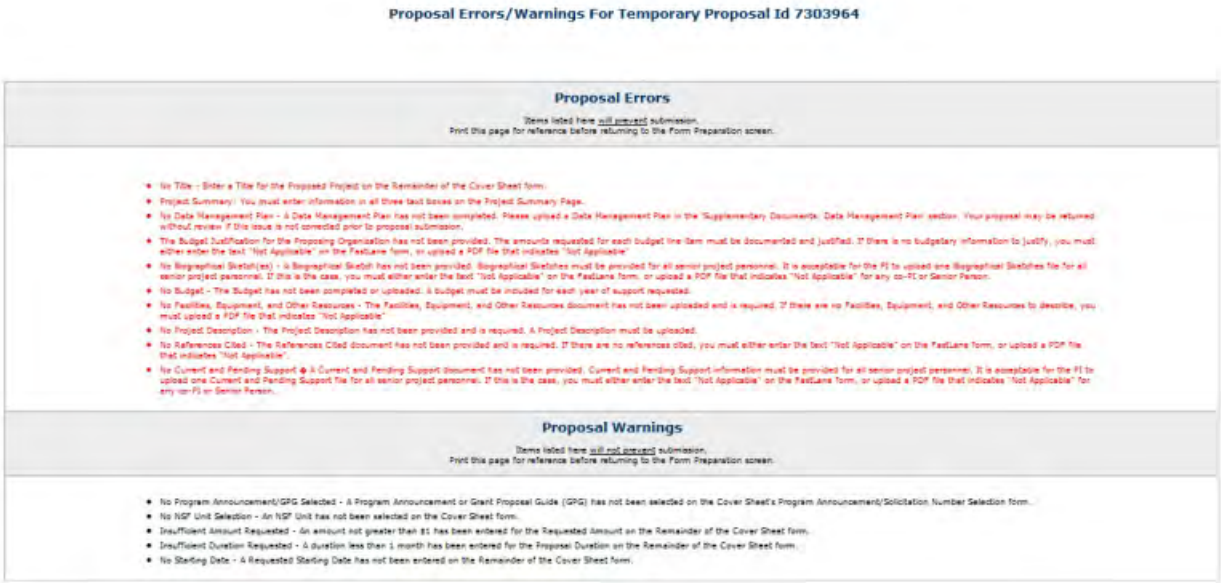

Figure 2 Upper portion of the Proposal Errors/Warnings screen with links to the rest of the screen.

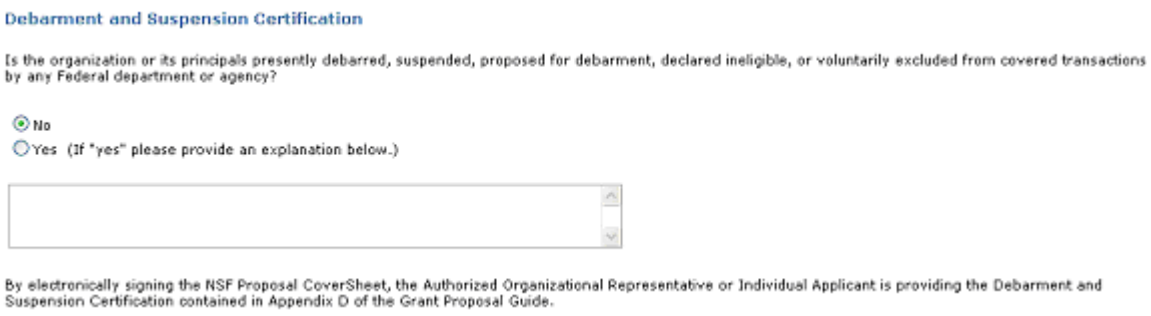

Figure 3 Debarment and Suspension Certification section of the Proposal Errors / Warnings screen.

3. In the **Debarment and Suspension** section of the **Proposal Errors / Warnings** screen (Figure 3), click the radio button for Yes or No if there are any debarments or suspensions of you or of your organization from transactions with federal agencies.
4. *If you answered Yes,* in the text box under the radio buttons (Figure 3), type an explanation.
5. In the **Institution Information** section of the **Proposal Errors / Warnings** screen (Figure 4), check the accuracy of the information for your organization.

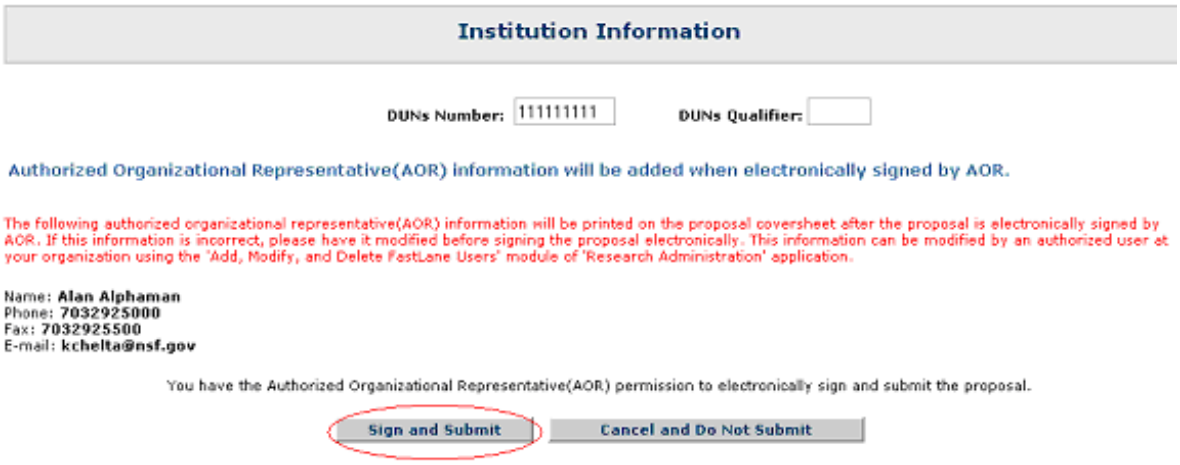

Figure 4 Institution Information section of the Proposal Errors / Warnings screen. The Sign and Submit button is circled.

6. At the bottom of the **Proposal Errors / Warnings** screen (Figure 4), click the **Sign and Submit** button. The **Proposal Submission Confirmation** screen displays (Figure 5) with a message that the Supplemental Funding Request has been successfully submitted to NSF. It also displays the official NSF number for the Supplemental Funding Request.

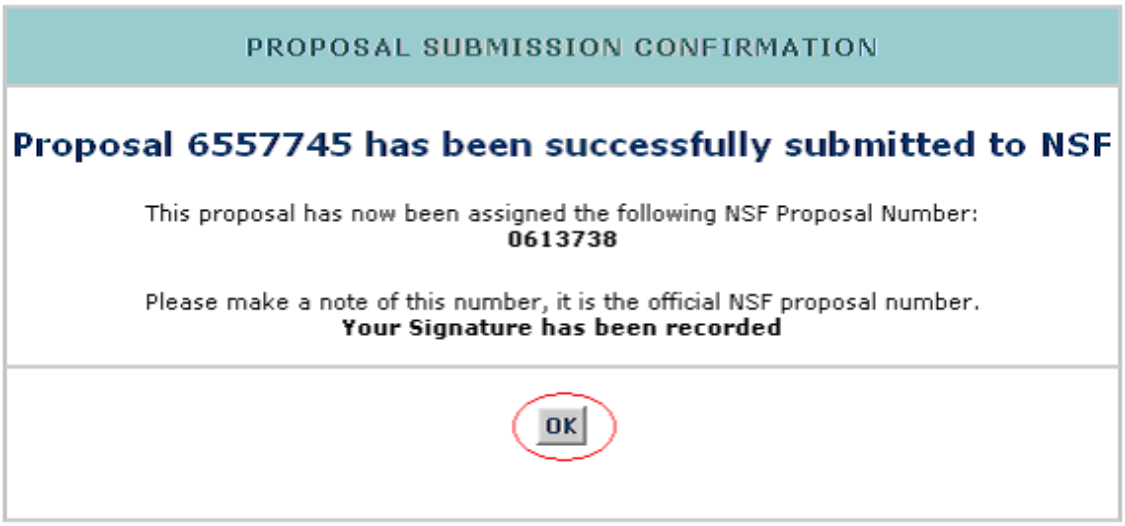

Figure 5 Proposal Submission Confirmation screen with the message that the Supplemental Funding Request has been submitted to NSF and with the NSF number for the Supplemental Funding Request.

Return a Supplemental Funding Request to the PI

1. Access the **Proposals / Supplements / File Updates / Withdrawals** screen on the **Documents in Progress** tab (Figure 1) (see Work on a Supplemental Funding Request).

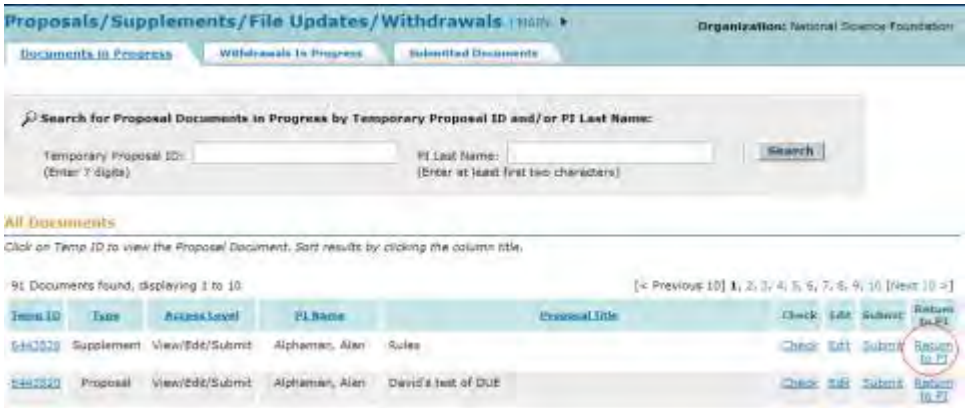

Figure 1 Proposals / Supplements / File Updates / Withdrawals screen on the Documents in Progress tab. The Return to PI button is circled.

2. On the **Proposals / Supplements / File Updates / Withdrawals** screen on the **Documents in Progress** tab (Figure 1), click **Return to PI** on the row for the Supplemental Funding Request that you want to return to the PI. A screen displays (Figure 2) with a message for you to confirm that you want to return the Supplemental Funding Request to the PI and a text box for a note to the PI.

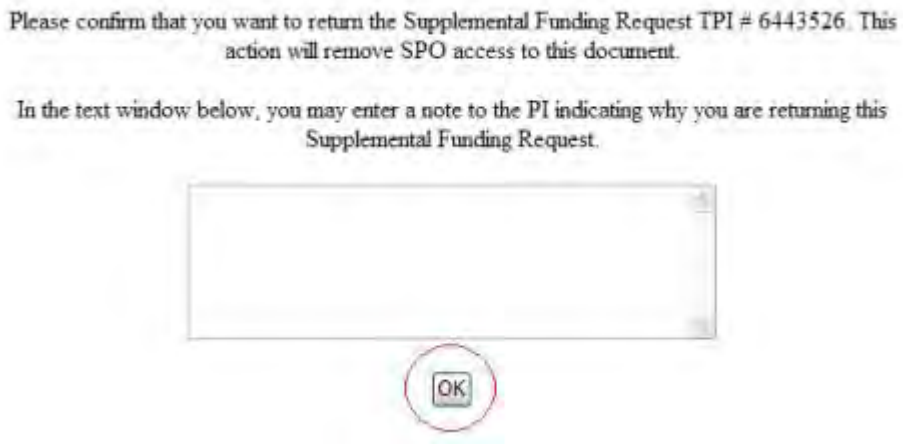

Figure 2 Screen with a message for you to confirm that you want to return the Supplemental Funding Request to the PI and a text box for you to type a note to the PI. The OK button is circled.

3. In the text box (Figure 2), type a note of explanation to the PI (optional).
4. Click the **OK** button (Figure 2). A screen displays (Figure 3) with the message that the Supplemental Funding Request has been returned to the PI.

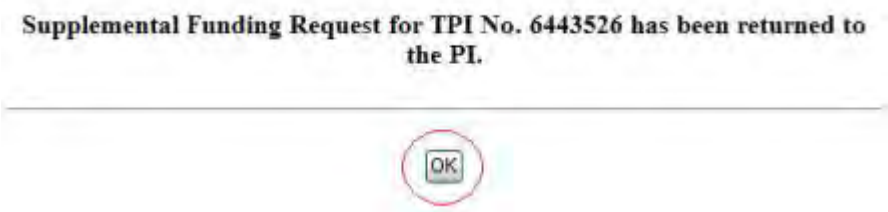

Figure 3 Screen with the message that the Supplementing Funding Request has been returned to the PI. The OK button is circled.

5. Click the **OK** button (Figure 3). The **Proposals / Supplements / File Updates / Withdrawals** screen displays on the **Documents in Progress** tab (Figure 1).

Withdraw a Supplemental Funding Request (AOR only)

1. Access the **Proposals / Supplements / File Updates / Withdrawals** on the **Documents in Progress** tab (Figure 1) (see Work on a Supplemental Funding Request).

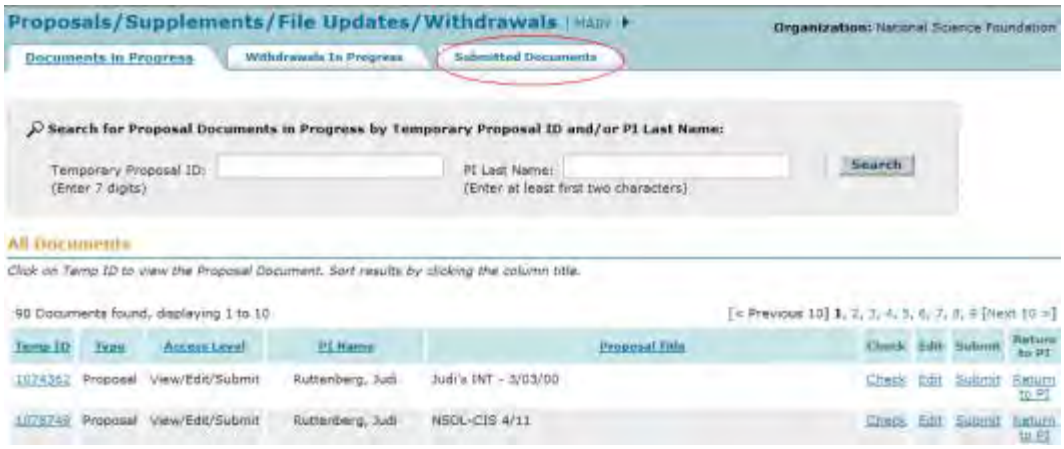

Figure 1 Proposals / Supplements / File Updates / Withdrawals on the Documents in Progress tab. The Submitted Documents tab is circled.

2. On the **Proposals / Supplements / File Updates / Withdrawals** screen on the **Documents in Progress** tab (Figure 1), click the **Submitted Documents** tab. The **Proposals / Supplements / File Updates / Withdrawals** screen displays on the **Submitted Documents** tab (Figure 2).

Figure 2 Proposals / Supplements / File Updates / Withdrawals screen on the Submitted Documents tab. The Withdraw link is circled.

3. Click **Withdraw** (Figure 2) on the row for the Supplemental Funding Request you want to withdraw. The **Proposal Withdrawal** screen displays (Figure 3).

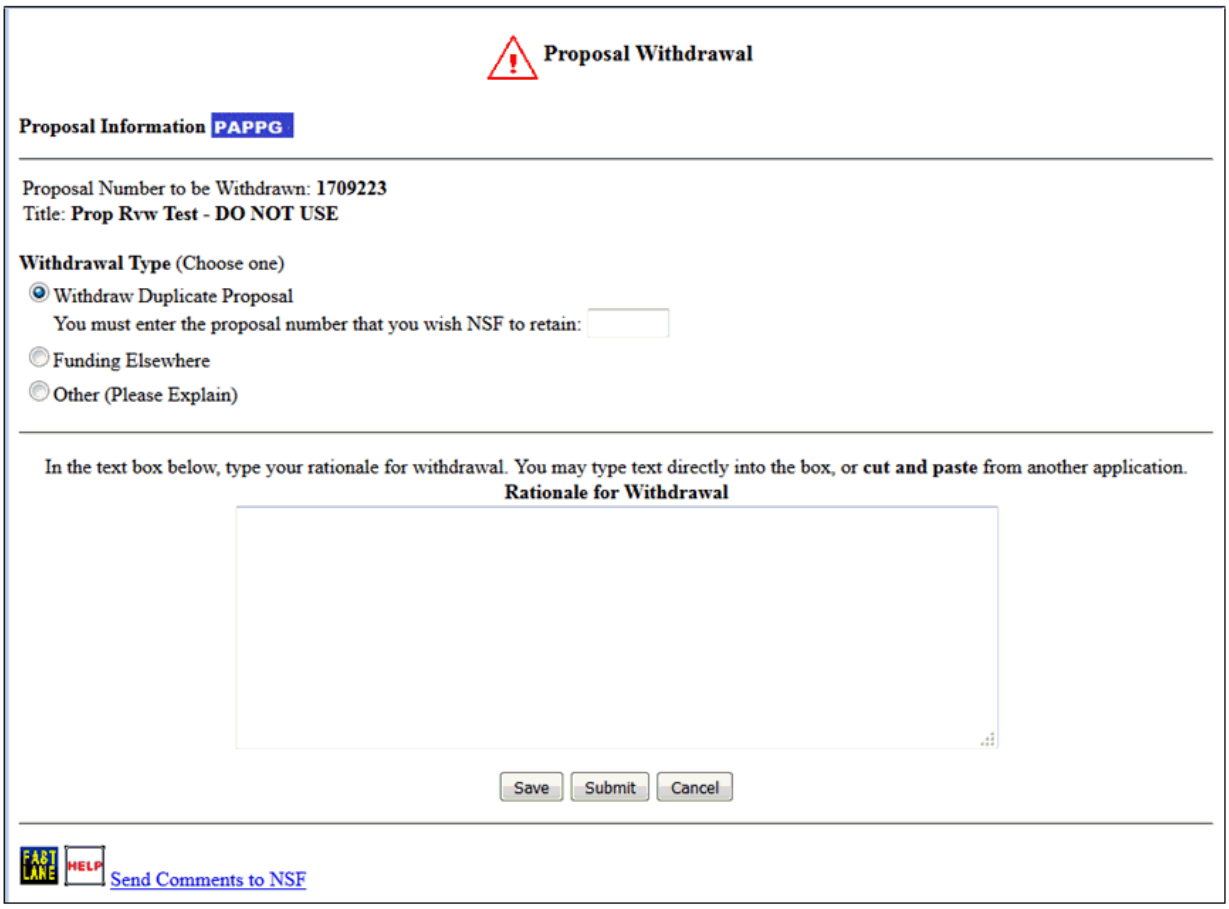

Figure 3 Proposal Withdrawal screen with the Rationale for Withdrawal text box. The Submit button is circled.

4. Under **Wiithdrawal Type** (Figure 3), click the radio button for Funding Elsewhere or Other.
5. In the **Rationale for Withdrawal** text box (Figure 3), type or copy and paste a detailed reason or reasons for withdrawing the Supplementary Funding Request.
6. Click the **Submit** button (Figure 3). The **Proposal Withdrawal** screen displays (Figure 4) with a message for you to confirm that you want to withdraw the Supplemental Funding Request from NSF.

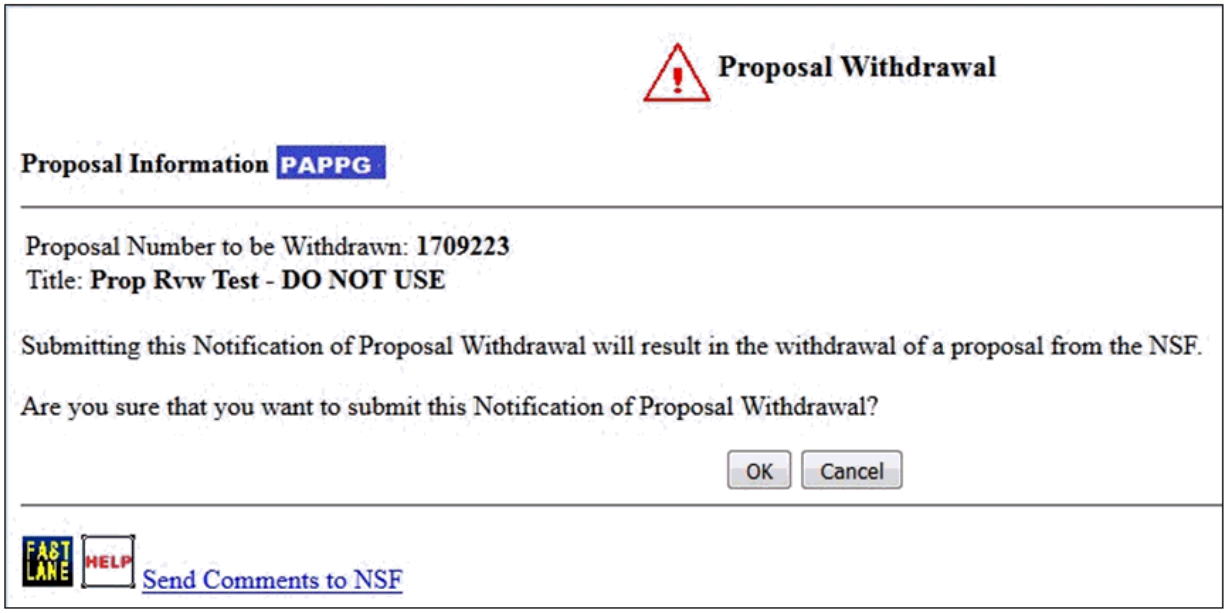

Figure 4 Proposal Withdrawal screen with a message for you to confirm that you want to withdraw the Supplemental Funding Request. The OK button is circled.

7. Click the **OK** button (Figure 4). The **Proposal Withdrawal Successful** screen displays (Figure 5) with the message that the Supplemental Funding Request has been withdrawn from NSF consideration.

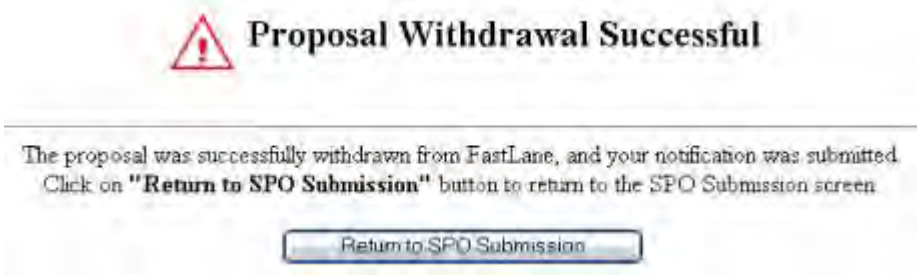

Figure 5 Proposal Withdrawal Successful screen.

8. Click the **Return to SPO Submission** button (Figure 5). The **Proposals / Supplements / File Updates / Withdrawals** screen displays on the **Submitted Documents** tab (Figure 1).

Forms for Supplemental Funding Request

Forms for a Supplemental Funding Request Introduction

The Supplementary Funding Request has the following forms for completion:

- Summary of Proposed Work (required)
- Budgets (Including Justification) (required)
- Add/Delete Senior Personnel
- Justification for Supplement (required)
- Supplementary Documents

- Revised End Date

Forms for a Supplemental Funding Request Introduction

The Supplementary Funding Request has the following forms for completion:

- Summary of Proposed Work (required)
- Budgets (Including Justification) (required)
- Add/Delete Senior Personnel
- Justification for Supplement (required)
- Supplementary Documents
- Revised End Date

Summary of Proposed Work for a Supplemental Funding Request

1. Access the **Form Preparation** screen (Figure 1) (see Prepare a Supplementary Funding Request or Edit a Supplementary Funding Request as an SPO/AOR).

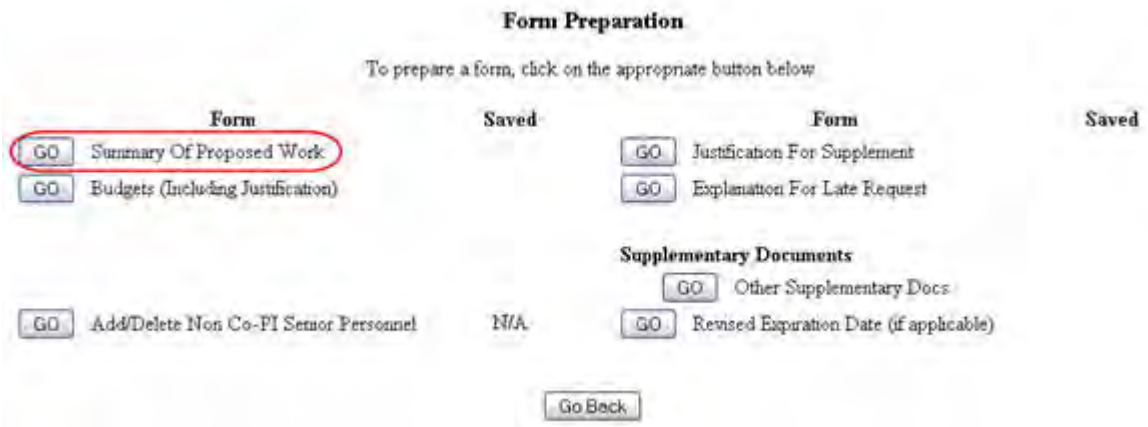

Figure 1 Form Preparation screen. The Go button for Summary of Proposed Work is circled.

2. On the **Form Preparation** screen (Figure 1), click the **Go** button for Summary of Proposed Work. The **Summary of Proposed Work** screen displays (Figure 2).

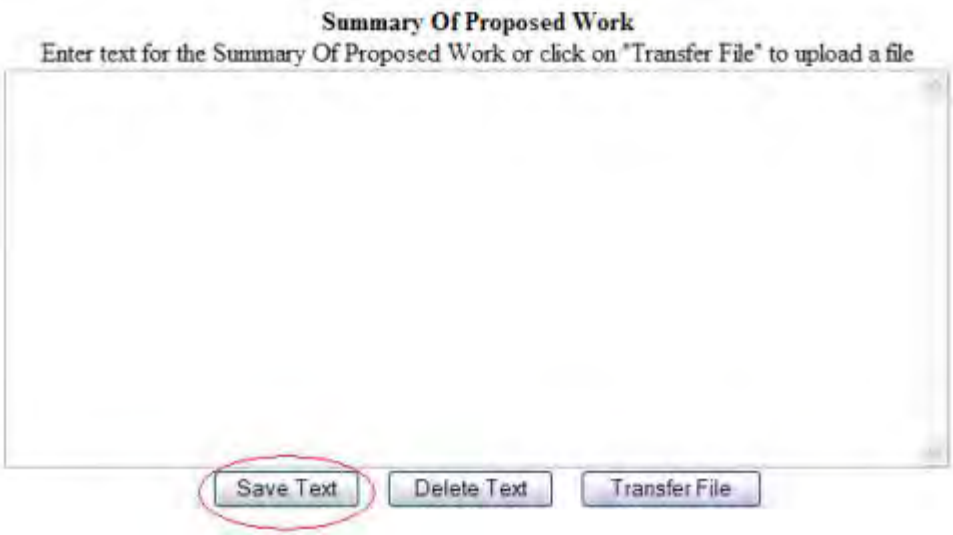

Figure 2 Summary of Proposed Work screen. The Save Text button is circled.

You have these options:

- Enter the Summary of Proposed Work in the text box
- Upload the Summary of Proposed Work

Enter the Summary of Proposed Work in the Text Box

1. On the **Summary of Proposed Work** screen (Figure 2) in the **Summary of Proposed Work** box, type in or copy and paste the Summary of Proposed Work.
2. Click the **Save Text** button (Figure 2). A screen displays (Figure 3) with a message that the Summary of Proposed Work is saved.

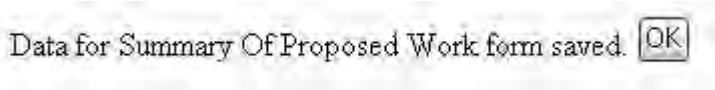

Figure 3 Screen with the message that the Summary of Proposed Work is saved.

3. Click the **OK** button (Figure 3). The **Form Preparation** screen displays (Figure 1).

Upload the Summary of Proposed Work

On the **Summary of Proposed Work** screen (Figure 4), click the **Transfer File** button. The **Summary of Proposed Work File Upload** screen displays (Figure 5). See Upload a File for directions.

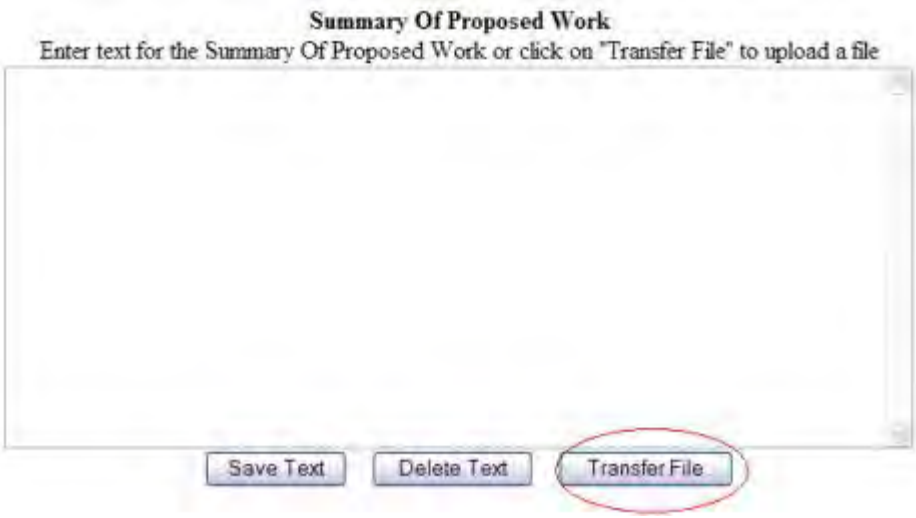

Figure 4 Summary of Proposed Work screen. The Transfer File button is circled.

Figure 5 Summary of Proposed Work File Upload screen.

If a Summary of Proposed Work has already been uploaded, when you click the **Go** button for Summary of Proposed Work on the **Form Preparation** screen, the **Summary of Proposed File Upload** screen displays (Figure 6) with these options:

- Display Current Summary of Proposed Work
- Delete Current Summary of Proposed Work
- Upload a New Summary of Proposed Work (This option automatically replaces the already uploaded file.)

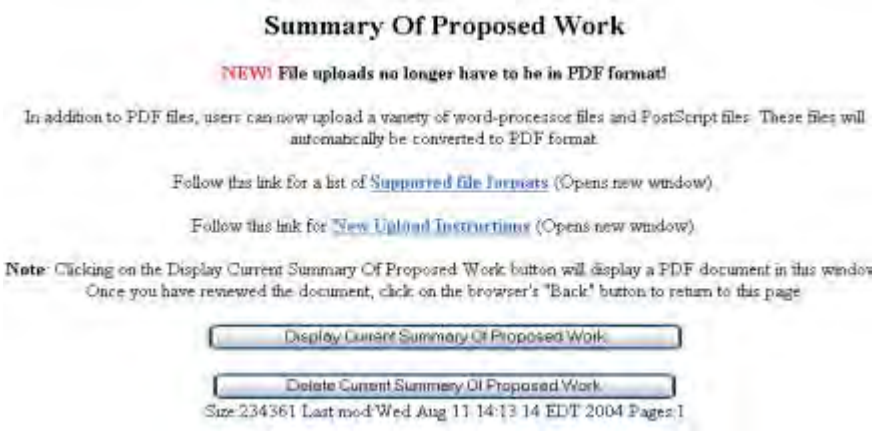

Figure 6 Summary of Proposed Work File Upload screen with the options to view and delete the uploaded Summary of Proposed Work.

Display Current Summary of Proposed Work

Click the **Display Current Summary of Proposed Work** button (Figure 6). The previously uploaded Summary of Proposed Work displays in PDF format. If you need to download Adobe Reader, see Adobe Reader for FastLane.

Delete Current Summary of Proposed Work

1. Click the **Delete Current Summary of Proposed Work** button (Figure 6). A screen displays with the message for you to confirm that you want to delete the file.
2. Click the **OK** button. The **Form Preparation** screen displays.

Upload a New Summary of Proposed Work

Follow the directions in Upload a File. Uploading a new Summary of Proposed Work automatically replaces the previously uploaded file.

Enter a New Summary of Proposed Work in the Text Box

If a Summary of Proposed Work has already been uploaded and you want to enter a new Summary of Proposed Work in the text box, do the following:

1. Click the **Delete Current Summary of Proposed Work** button (Figure 6). A screen displays with a message for you to confirm that you want to delete the file.
2. Click the **OK** button. The **Summary of Proposed Work File Upload** screen displays.
3. Return to the **Form Preparation** screen.
4. Click the **Go** button for Summary of Proposed Work. The **Summary of Proposed Work** screen redisplays with the text box. See Enter the Summary of Proposed Work in the Text Box.

Budgets (Including Justification) for a Supplemental Funding Request

1. Access the **Form Preparation** screen (Figure 1) (see Prepare a Supplementary Funding Request or Edit a Supplementary Funding Request as an SPO/AOR).

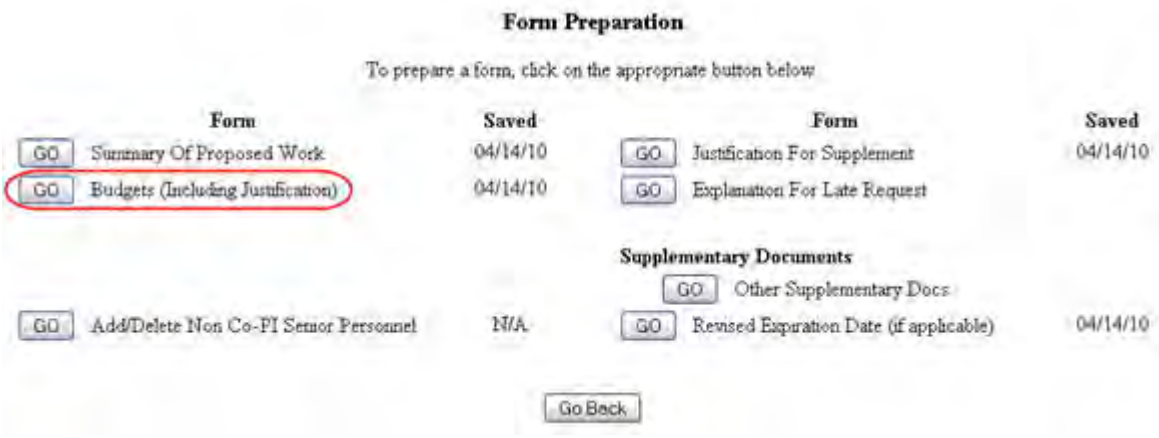

Figure 1 Form Preparation screen. The Go button for Budgets (Including Justification) is circled.

2. On the **Form Preparation** screen (Figure 1), click the **Go** button for Budgets (Including Justification). The **Project Budget** screen displays (Figure 2). See Budgets (Including Justification) and Create a Budget, Step 2 for instructions on how complete a budget for the subawardee organization.

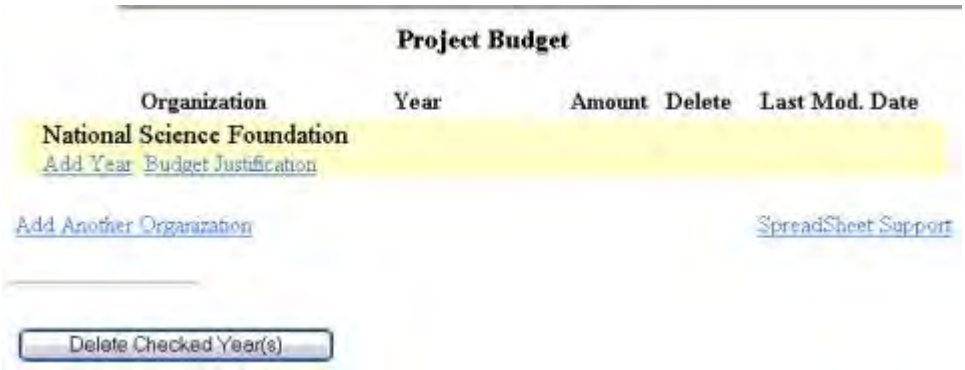

Figure 2 Project Budget screen.

Add/Delete Non-Co-PI Senior Personnel for a Supplemental Funding Request

1. Access the **Form Preparation** screen (Figure 1) (see Prepare a Supplementary Funding Request or Edit a Supplementary Funding Request as an SPO/AOR).

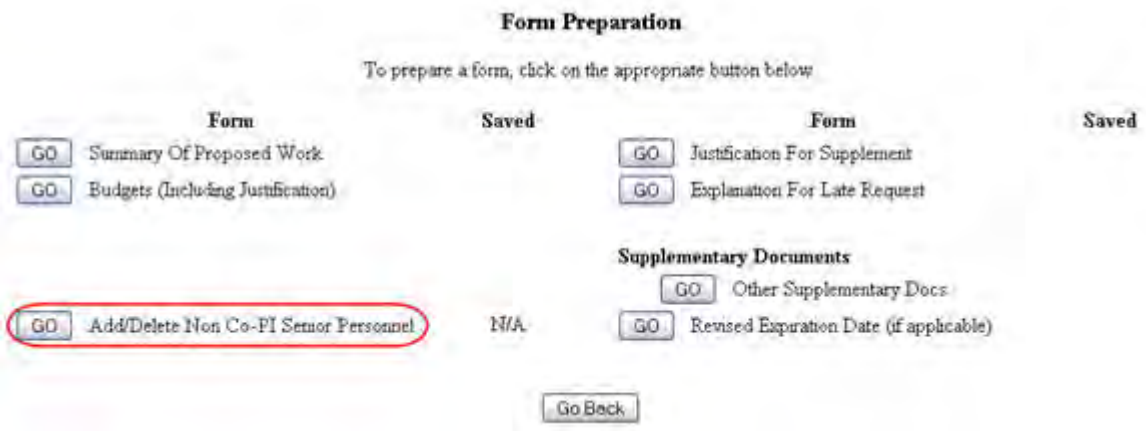

Figure 1 Form Preparation screen. The Go button for Add/Delete Non-Co-PI Senior Personnel is circled.

2. On the **Form Preparation** screen (Figure 1), click the **Go** button for Add/Delete Non-Co-PI Senior Personnel. The **Add/Delete Non-Co-Principal Investigator (Co-PI) Senior Personnel Assigned to Proposal** screen displays (Figure 2). See Add/Delete Non-Co-PI Senior Personnel for instructions on completing the form.

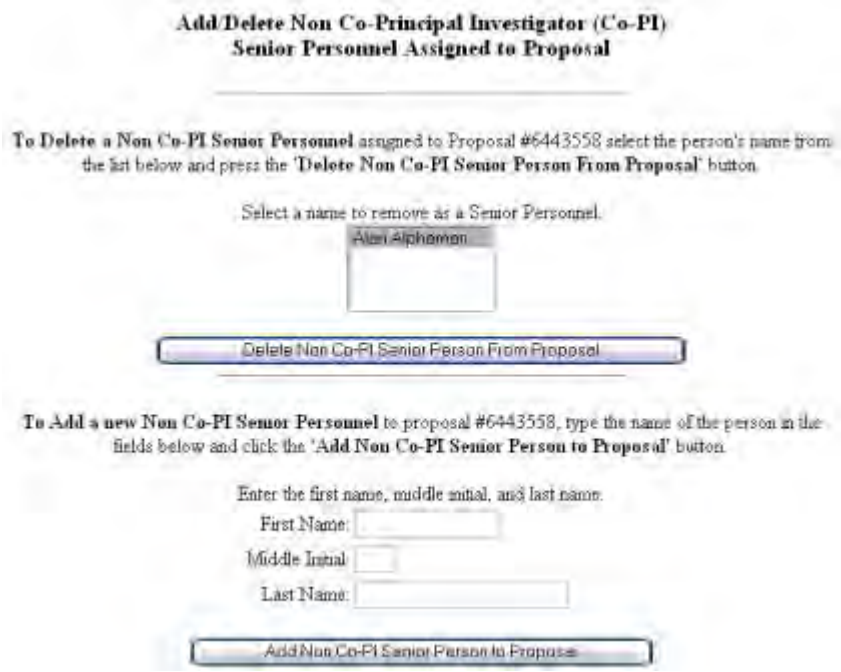

Figure 2 Add/Delete Non-Co-Principal Investigator (Co-PI) Senior Personnel Assigned to Proposal screen.

Justification for a Supplemental Funding Request

1. Access the **Form Preparation** screen (Figure 1) (see Prepare a Supplementary Funding Request or Edit a Supplementary Funding Request as an SPO/AOR).

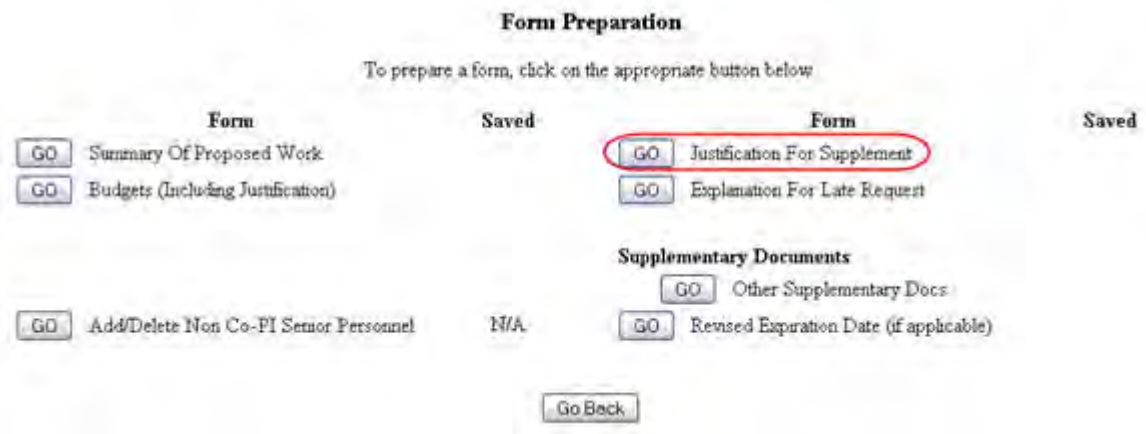

Figure 1 Form Preparation screen. The Go button for Justification for Supplement is circled.

2. On the **Form Preparation** screen (Figure 1), click the **Go** button for Justification for Supplement. The **Justification for Supplement** screen displays (Figure 2).

Figure 2 Justification for Supplement screen. The Save Text button is circled.

You have these options:

- Enter the Justification for Supplement in the text box
- Upload the Justification for Supplement

Enter the Justification for Supplement in the Text Box

1. On the **Justification for Supplement** screen (Figure 2), type in or copy and paste the Justification for Supplement in the **Justification for Supplement** box.
2. Click the **Save Text** button (Figure 2). A screen displays (Figure 3) with a message that the Justification for Supplement data is saved.

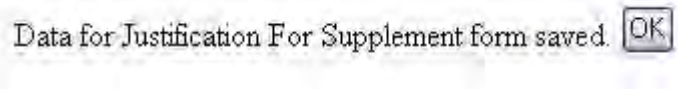

Figure 3 Screen with a message that the Justification for Supplement is saved.

3. Click the **OK** button (Figure 3). The **Form Preparation** screen displays (Figure 1).

Upload the Justification for Supplement

On the **Justification for Supplement** screen (Figure 4), click the **Transfer File** button. The **Justification for Supplement File Upload** screen displays (Figure 5). See Upload a File for directions.

Figure 4 Justification for Supplement screen. The Transfer File button is circled.

Figure 5 Justification for Supplement File Upload screen.

If a Justification for Supplement has already been uploaded, when you click the **Go** button for Justification for Supplement on the **Form Preparation** screen, the **Summary of Proposed File Upload** screen displays (Figure 6) with these options:

- Display Current Justification for Supplement
- Delete Current Justification for Supplement
- Upload a New Justification for Supplement (This option automatically replaces the already uploaded file.)

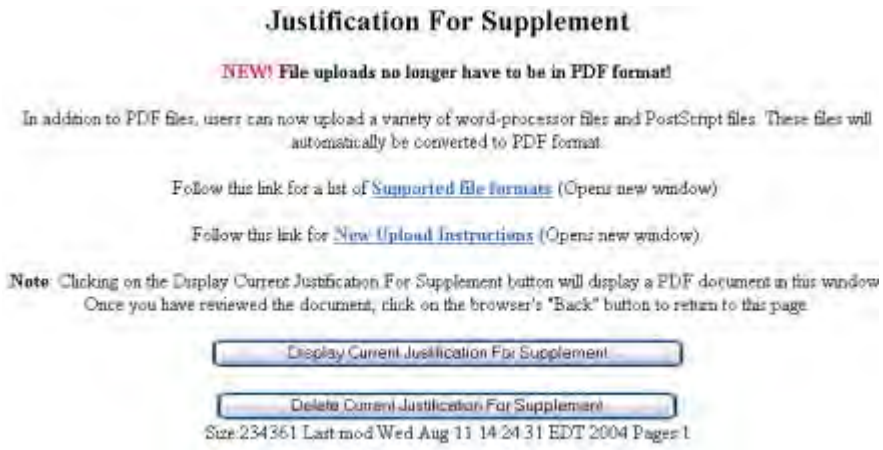

Figure 6 Justification for Supplement File Upload screen with options to view and delete the uploaded Justification.

Display Current Justification for Supplement

Click the **Display Current Justification for Supplement** button (Figure 6).The previously uploaded Justification for Supplement displays in PDF format. If you need to download Adobe Reader, see Adobe Reader for FastLane.

Delete Current Justification for Supplement

1. Click the **Delete Current Justification for Supplement** button (Figure 6). A screen displays with the message for you to confirm that you want to delete the file.
2. Click the **OK** button. The **Form Preparation** screen displays.

Upload a New Justification for Supplement

Follow the directions in Upload a File. Uploading a new Justification for Supplement automatically replaces the previously uploaded file.

Enter a New Justification for Supplement in the Text Box

If a Justification for Supplement has already been uploaded and you want to enter a new Justification for Supplement in the text box, do the following:

1. Click the **Delete Current Justification for Supplement** button (Figure 6). A screen displays with a message for you to confirm that you want to delete the file.
2. Click the **OK** button. The **Justification for Supplement File Upload** screen displays.
3. Return to the **Form Preparation** screen.
4. Click the **Go** button for Justification for Supplement. The **Justification for Supplement** screen redisplays with the text box. See Enter the Justification for Supplement in the Text Box.

Other Supplementary Documents for a Supplemental Funding Request

1. Access the **Form Preparation** screen (Figure 1) (see Prepare a Supplementary Funding Request or Edit a Supplementary Funding Request as an SPO/AOR).

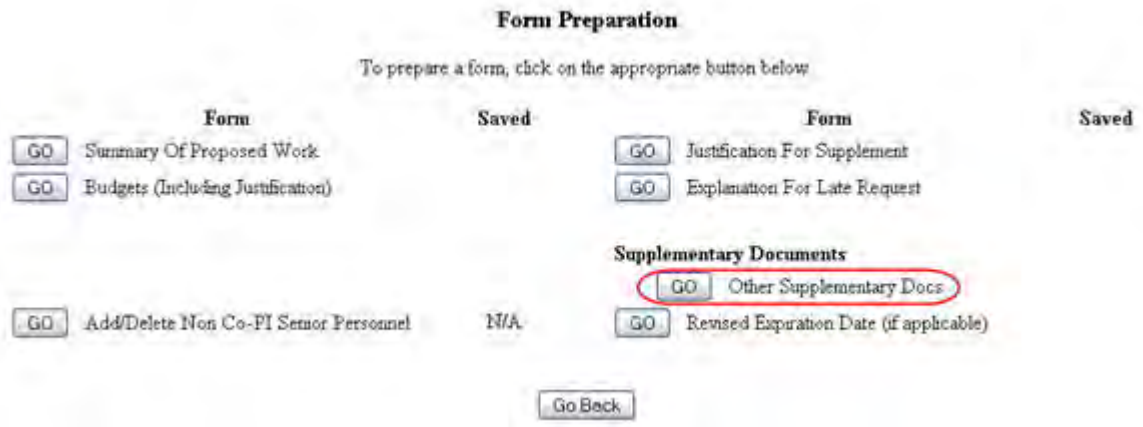

Figure 1 Form Preparation screen. The Go button for Other Supplementary Docs is circled.

2. On the PI Transfer **Form Preparation** screen (Figure 1), click the **Go** button for Other Supplementary Docs. The **Other Supplementary Docs** screen displays (Figure 2). You have two options on this screen:
   - Enter Other Supplementary Documents in the text box
   - Upload Other Supplementary Documents

Figure 2 Supplementary Docs screen. The Save Text button is circled.

Enter Other Supplementary Documents in the Text Box

1. Type in or copy and paste the Other Supplementary Document in the text box (Figure 2).
2. Click the **Save Text** button (Figure 2). A screen displays (Figure 3) with the message that the Other Supplementary Document data is saved.

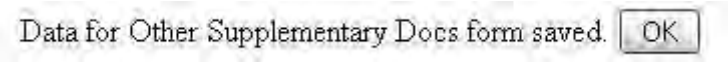

Figure 3 Screen with the message that the Other Supplementary Document text has been saved.

4. Click the **OK** button (Figure 2). The **Form Preparation** screen displays.

Upload Other Supplementary Documents

1. On the **Other Supplementary Docs** screen (Figure 4), click the **Transfer File** button. The **Other Supplementary Document File Upload** screen displays (Figure 5). See Upload a File for directions.

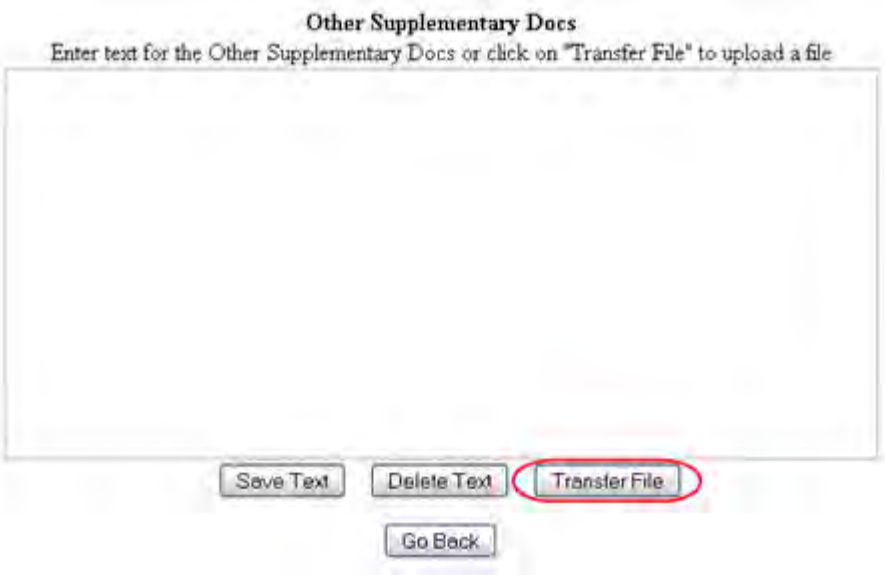

Figure 4 Other Supplementary Docs screen. The Transfer File button is circled.

Figure 5 Supplementary Documents File Upload screen.

Once the Supplementary Document has been uploaded, the **Supplementary Document File Upload** screen displays as in Figure 6.

Figure 6 Supplementary Document File Upload screen after a file has been uploaded.

This screen gives you these options:

- Display Current Supplementary Docs
- Delete Current Supplementary Docs
- Upload a Supplementary Document

Note: Uploading a new Supplementary Document will not result in deleting a previously uploaded file.

Display Current Supplementary Docs

1. On the **Supplementary Document File Upload** screen (Figure 6), highlight the Supplementary Document you want to view in the list.
2. Click the **Display Current Supplementary Docs** button (Figure 6). The file displays in PDF format. If you need to download Adobe Reader, see Adobe Reader for FastLane.

Delete Current Supplementary Docs

1. On the **Supplementary Document File Upload** screen (Figure 6), highlight the Supplementary Document you want to delete in the list.
2. Click the **Delete Current Supplementary Docs** button (Figure 6). A screen displays asking you to confirm that you want to delete the file.
3. Click the **OK** button. The **Form Preparation** screen displays.

Upload a Supplementary Document

Follow the directions in Upload a File. Uploading a new file will not replace any previously uploaded files.

Enter a New Supplementary Document in the Text Box

If a Supplementary Document has already been uploaded and you want to write a new Supplementary Document in the text box, do the following:

1. On the **Supplementary Document File Upload** screen (Figure 6), click the **Delete Current Project Summary** button. A screen displays with a message for you to confirm that you want to delete the file.
2. Click the **OK** button. The **Supplementary Docs File Upload** screen displays (Figure 6).
3. Return to the **Form Preparation** screen.
4. Click the **Go** button next to Other Supplementary Docs. The **Other Supplementary Docs** screen displays with the text box. See Enter the Other Supplementary Document in the Text Box.

Revised End Date for Supplemental Funding Request

1. Access the **Form Preparation** screen (Figure 1) (see Prepare a Supplementary Funding Request or Edit a Supplementary Funding Request as an SPO/AOR).

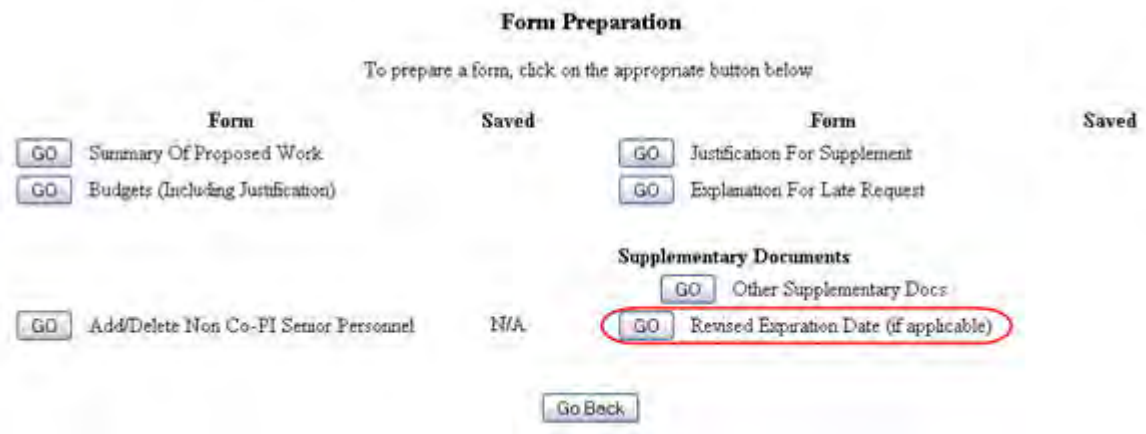

Figure 1 Form Preparation screen. The Go button for Revised End Date is circled.

2. On the **Form Preparation** screen (Figure 1), click the **Go** button for Revised End Date. The screen displays (Figure 2) for you to enter the revised expiration date.

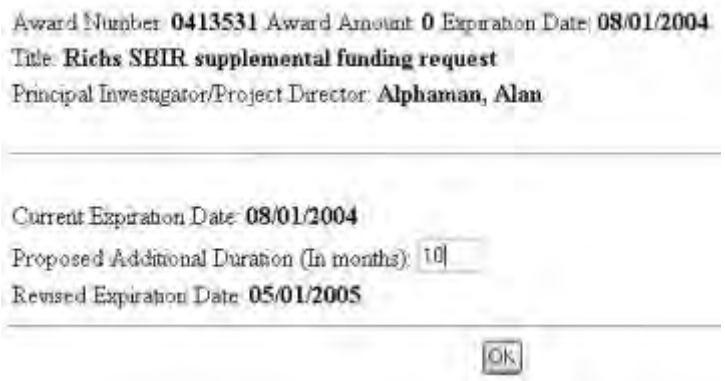

Figure 2 Screen for entering the proposed additional duration of the award.

3. In the **Proposed Additional Duration** box (Figure 2), type the number of months for an extension of the award.
4. Click the **OK** button (Figure 2). The screen displays again with the number you typed.
5. Click the browser back button to return to the **Form Preparation** screen (Figure 1).

Facilities Performance Report

Introduction to the NSF Facility Performance Reporting System

Print the contents of the Facilities Performance Report book.

A brief overview of the system and its capabilities are discussed in the following subsections.

- Government Performance & Results Act Goals
- Facility Report Types
- Workflow
- Navigating the FPRS
- Email Notifications

See also:
- Operations Reports
- Construction/Upgrade Report
- Earned Value Management for a Construction Report

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Government Performance & Results Act Goals

The National Science Foundation's (NSF) Fiscal Year (FY) 2003 Government Performance & Results Act (GPRA) Performance Plan identifies goals relevant to the operation, construction, and upgrade of NSF-supported facilities. The goals are identified as:
- **Operations**: For 90 percent of operational facilities, keep scheduled operating time lost to less than 10 percent.
- **Construction/Upgrade**: For 90 percent of construction, acquisition, and upgrade projects, keep any negative cost and schedule variances to less than 10 percent of the approved project plan.

Definition of a Facility

To qualify as a "facility" for the purposes of GPRA reporting, the award or collection of awards made by NSF must meet the following criteria:
- Established through construction and/or acquisition, upgrade or operating infrastructure, instrumentation, equipment, or software that is intended to enable a broad segment of researchers and/or educators to conduct research and/or education activities; AND
- Funded through the "Tools" category of NSF's budget; AND
- The approved project expenditure plan is at least $5M for construction projects, and the approved annual expenditure plan is at least $1M for operations projects. For Operations projects, this refers to the Operations and Maintenance portion of the project expenditure plan as opposed to funds provided for research and/or education.

Reporting Requirements

In order to assess progress relative to the GPRA goals for facilities, NSF requires those facilities that meet the above criteria to submit an annual Operations Report and/or

Construction/Upgrade Report. The reporting period covers the federal fiscal year, October 1st—September 30th.
There are two reporting cycles—estimates and actuals—in each federal fiscal year. The table below details the performance data to be reported during the estimates and actuals reporting cycles respectively. Table 1 describes the requirements for these reports.

Table 1 Estimates and Actuals Reporting Requirements

Report Type	Estimates Reporting Cycle	Actuals Reporting Cycle
Operations Report	User Unit Type User Unit Definition Estimated Allocation Explanation of Estimated Allocation	Actual Allocation Explanation of Actual Allocation
Construction/Upgrade Report	**Project Baseline Description:** Estimated Total Project Cost Estimated Project Completion Year	**Project Baseline Description:** Not Required
	Planned Value	Earned Value Actual Cost

You, as a Principal Investigator (PI), will be notified by email of the opening and closing dates for both the estimates and actuals reporting cycles. The *Estimated Total Project Cost* and the *Estimated Project Completion Year* are required when the first Construction/Upgrade Report for the estimates reporting cycle is submitted.

For further information on reporting requirements, see:

- Operations Reports
- Construction Report
- Earned Value Management for a Construction Report

Facility Report Types

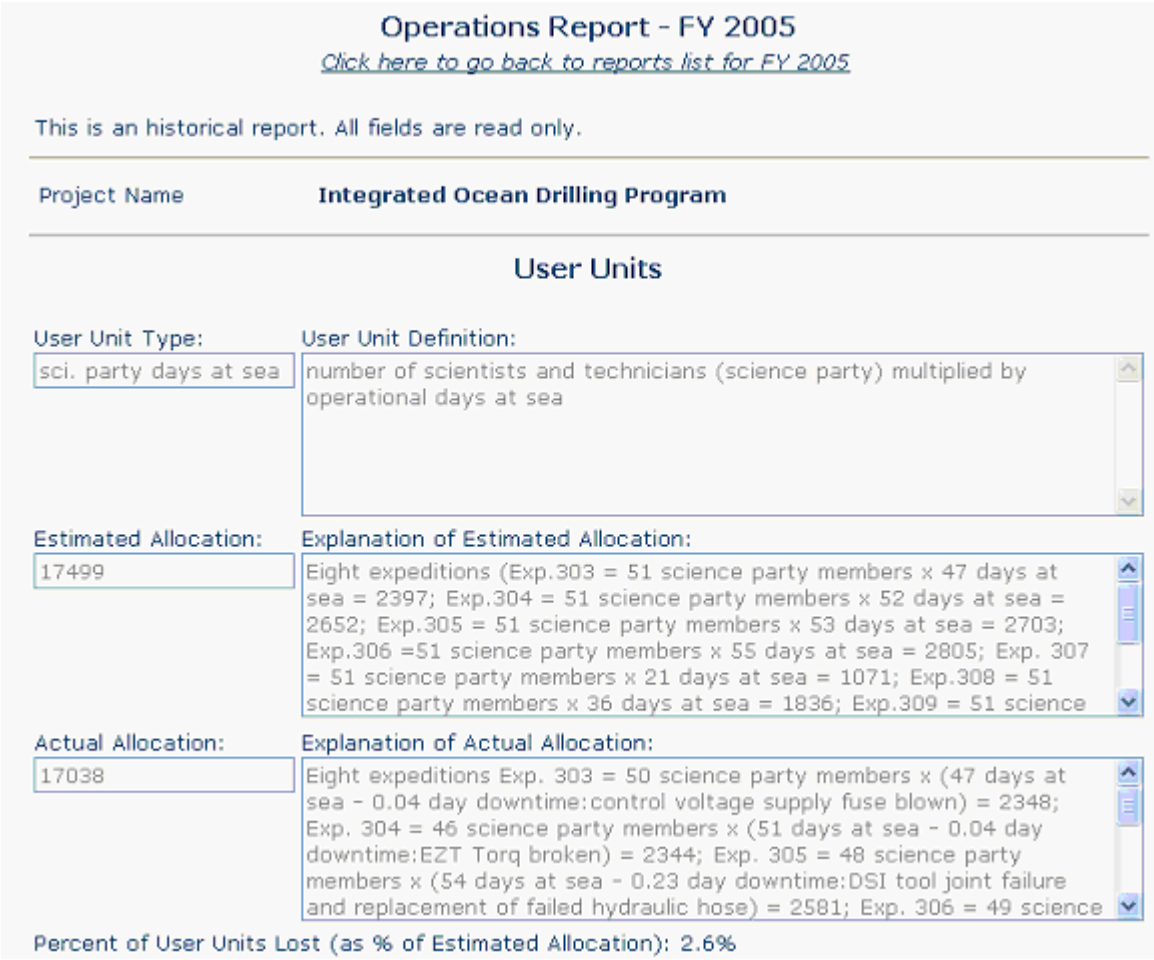
The Facility Performance Reporting System (FPRS) provides NSF grantees with the capability to report on two distinct types of large facilities activities—Operations and Construction/Upgrade. An Operations Report is required for facilities that are awarded more than $1M in operations support per annum. A Construction/Upgrade report is required for facilities that are awarded at least $5M over the duration of the project. The underlying workflow for both reports is the same. However, the performance information collected is different depending upon the available reporting cycle. Estimates performance data is to be entered at the beginning of the federal fiscal year (10/1—9/30), and Actuals performance data is to be entered at the end of the federal fiscal year.

Operations Report Type

The Operations Report compares the *Estimated Allocation* of user units at the beginning of the fiscal year with the *Actual Allocation* of user units at the end of the fiscal year. The user unit information for an Operations Report is tracked yearly

Operations performance is determined by comparing the *Estimated Allocation* of user units with the *Actual Allocation* of user units for a facility. You define the user unit. NSF encourages you to define a user unit at the lowest detailed level. All user unit data reported

in the Operations Report are tracked on a federal fiscal year basis. Thus, you will be required to submit an Operations Report for every fiscal year in which the facility meets the requirements for reporting as described in *Reporting Requirements*. Figure 1 shows an Operations Report.



Operations Report - FY 2005

Click here to go back to reports list for FY 2005

This is an historical report. All fields are read only.

Project Name **Integrated Ocean Drilling Program**

User Units

User Unit Type: sci. party days at sea

User Unit Definition: number of scientists and technicians (science party) multiplied by operational days at sea

Estimated Allocation: 17499

Explanation of Estimated Allocation: Eight expeditions (Exp.303 = 51 science party members x 47 days at sea = 2397; Exp.304 = 51 science party members x 52 days at sea = 2652; Exp.305 = 51 science party members x 53 days at sea = 2703; Exp.306 =51 science party members x 55 days at sea = 2805; Exp. 307 = 51 science party members x 21 days at sea = 1071; Exp.308 = 51 science party members x 36 days at sea = 1836; Exp.309 = 51 science

Actual Allocation: 17038

Explanation of Actual Allocation: Eight expeditions Exp. 303 = 50 science party members x (47 days at sea - 0.04 day downtime:control voltage supply fuse blown) = 2348; Exp. 304 = 46 science party members x (51 days at sea - 0.04 day downtime:EZT Torq broken) = 2344; Exp. 305 = 48 science party members x (54 days at sea - 0.23 day downtime:DSI tool joint failure and replacement of failed hydraulic hose) = 2581; Exp. 306 = 49 science

Percent of User Units Lost (as % of Estimated Allocation): 2.6%

Figure 1 Operations Report for a prior fiscal year.

Table 1 details the definitions of the Operations Report's performance data.

Table 1 Operations Report Performance Data

Performance Data	Definition
User Unit Type	The standard unit of measure in which the facility tracks the amount of service it provides (i.e., minute, hour, day, CPU hour, etc.). It is a text field that is required.

User Unit Definition	Description of the type of service that the facility provides to its community such as: • 1 hour of viewing time at a telescope, • 1 day at sea on a research vessel, • 1 Central Processing Unit (CPU) hour • This is a text field that is required.
Estimated Allocation	The estimated number of user units that the facility expects to make available to users through the federal fiscal year. This field is an integer that is required
Explanation of Estimated Allocation	Provides you with an opportunity to describe relevant information pertaining to the estimated allocation. This is a text field that is required.
Actual Allocation	The actual number of user units that were available to the users through the federal fiscal year. This field is an integer that is required.
Explanation of Actual Allocation	Provides you with an opportunity to describe relevant information pertaining to the actual allocation. This is a text field that is required.

For further information on Operations Reports, see Operations Reports.

Construction/Upgrade Reports

The Construction/Upgrade Report compares the *Planned Value* at the beginning of the fiscal year during the Estimates reporting cycle with the *Earned Value* and *Actual Cost* at the end of the fiscal year during the Actuals reporting cycle. In addition, the Construction/Upgrade Report will have an overall Project Baseline Description defined for the project.

Construction performance is tracked both on a total project level and an annual level. Total project information is defined as the Project Baseline Description requiring you to submit an Estimated Total Project Cost and the Estimated Project Completion Year. The annual information is tracked by comparing the Planned Value with the Earned Value and Actual Cost (see Earned Value Management to learn more). Figure 2 shows a Construction/Upgrade Report.

Construction Report - FY 2005

Click here to go back to reports list for FY 2005

This is an historical report. All fields are read only.

Project Name **Scientific Ocean Drilling Vessel**

Current Project Baseline Description	History
Current Profile Acceptance Date	**Jun 24, 2005**
Estimated Project Completion Year	**2007**
Estimated Total Cost (in Millions)	**115.0**

Annual Reports

Fiscal Year	Planned Value (PV) (in currently approved project plan) ($ in Mil.) (Project thru FY)	Actual Cost (AC) ($ in Mil.) (Project thru FY)	Earned Value (EV) ($ in Mil.) (Project thru FY)	Cost Variance as a percent of Project Plan	Schedule Variance as a percent of Project Plan
2005	2.49	0.85	0.84	-1.2%	-66.3%

View Estimates Worksheet

Planned Value Explanation:

Project started 1 June, 2005. Planned Value is for completion of source selection, initiation of engineering design, and development of the on board science system. Planned Value for FY05 does not match the FY05 MREFC Annual Work Plan due to timing of contract awards and distribution of contingency.

View Actuals Worksheet

Earned Value and Actual Cost Explanation:

The SODV Program experienced a slower start-up than anticipated. The award of the drilling contractor contract was delayed by hurricanes and so the start of the engineering design was delayed. This resulted in a slower ramp-up of expenditures triggering the schedule variance. The development of the science system was also delayed. Expect the situation to improve after the drilling contractor contract is awarded in

Click here for Printable View

Figure 2 Construction/Upgrade Report from a prior fiscal year.

Table 2 details the definitions of the Construction/Upgrade Report's performance data.

Table 2 Construction/Upgrade Report Performance Data

Performance Data	Definition
Project Baseline Description (Required for the 1st reporting cycle) Estimated Total Project Cost	The estimated total cost of the project in millions of dollars. This is an integer that is required.
Project Baseline Description (Required for the 1st reporting cycle) Estimated Project Completion Year	The estimated federal fiscal year (10/1-9/30) in which the Construction/Upgrade project is expected to be complete. This is a date field and is required.
Planned Value	You submit the Planned Value at the beginning of the federal fiscal year. Planned Value is also known as the Budgeted Cost of Work Scheduled (BCWS) and represents the estimated value (in million of dollars) of the work to be accomplished as scheduled by the project through the federal fiscal year. This integer data field is required. FPRS will accept decimals but will round to the nearest dollar.
Earned Value	You submit the Earned Value at the end of the federal fiscal year. Earned Value is also known as the Budgeted Cost of Work Performed (BCWP) and represents the planned costs (in millions of dollars) of the work allocated to the activities completed (or portions of activities) through the federal fiscal year. It measures progress against the plan. This integer data field is required. FPRS will accept decimals but will round to the nearest dollar.
Actual Cost	You submit the Actual Cost at the end of the federal fiscal year. The Actual Cost, also known as the Actual Cost of Work Performed (ACWP), represents the expenditures (in millions of dollars) actually incurred in accomplishing the work performed through the federal fiscal year. The actual costs of the work are charged against the activities completed (or portions of activities). This integer data field is required. FPRS will accept decimals but will round to the nearest dollar.

For further information on Construction/Upgrade Reports, see Construction/Upgrade Report. See also Earned Value Management for a Construction/Upgrade Report.

Workflow

For the estimates and actuals reporting cycles, the report submission passes through a predefined workflow. This workflow applies to both report types (Operations and Construction/Upgrade) and reporting cycles (estimates and actuals). Figure 1 details the process for a facilities report in FPRS for both reporting cycles.

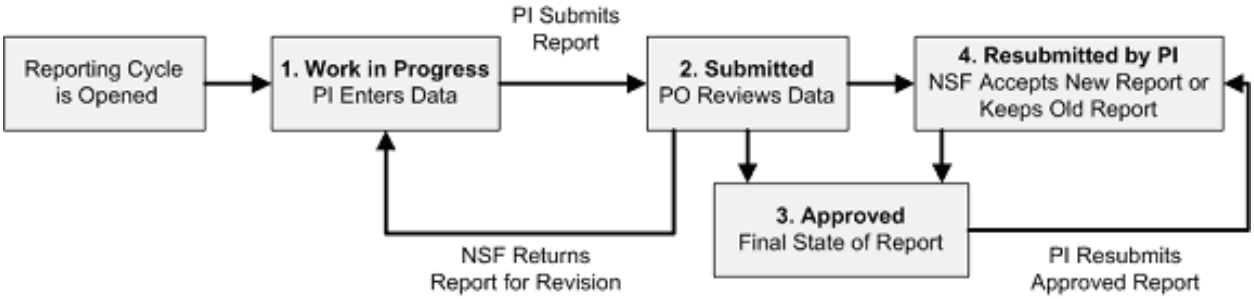


Figure 1 FPRS Report Workflow.

Workflow States

The following describes each workflow state in FPRS for both the estimates and actuals reporting cycles:

- **Work In Progress**—The report is currently being worked on by you and has not yet been submitted to NSF for review. This report may be saved and retrieved at a later date. A saved report by you can be viewed.
- **Submitted**—You have submitted the report for review by NSF, but the Program Officer (PO) has not yet approved it. Resubmitting a report while in this state will not require approval from NSF.
- **Reopened**—NSF has returned the report to you for revisions. To view the comments from the PO, select the comments link on the Detail screen.
- **Under Review**—NSF is reviewing the report. Resubmitting a report while in this state will require approval by NSF.
- **Complete**—NSF accepted the report. Resubmitting a report while in this state will require approval by NSF.
- **Resubmitted by PI**—resubmitted the report to NSF. NSF will accept either the new report or old report. You can perform no action on this report while in this state.
- **N/A**—The corresponding reporting cycle for this report has not yet begun. For example, this will appear in the Actuals Status box for an Operations Report where the estimates reporting cycle is open for submission, indicating actuals cannot be reported at this time.

Workflow Example—Estimates and Actuals Reporting Cycle

Once NSF opens either the estimates or actuals reporting cycle, you will log into FPRS to view your reports (see Navigating the FPRS). The appropriate performance data fields will be displayed depending on the reporting cycle. To submit a report, you will enter the relevant data and select the **Submit to NSF** button. At this time, the report becomes view-only to you while the NSF reviews the report.

Upon review, NSF may either choose to **Return to PI** for corrections or **Accept** the report. If the report is returned for corrections, you will receive an email notification requesting you to log into FPRS to view NSF comments and update the report as requested. You will have the ability to make the necessary changes in FPRS and resubmit the report to NSF. This cycle of submits—reviews—returns—resubmits may continue iteratively until both parties agree to the data in the report. There is no limit to the number of iterations in FPRS, provided the reporting cycle is open. Once NSF accepts the report, an email notification is sent, marking the end of the workflow and changing the report status to “complete.”

FPRS is designed to provide you with flexibility in reporting, recognizing that revisions to reports previously submitted to NSF may be necessary. Therefore, FPRS provides you with the capability to resubmit reports if corrections are required. The following describes the resubmission conditions available to you in FPRS:

- If you have submitted a report to NSF and NSF has not accepted the report, you may resubmit the report with new values to be accepted by NSF by selecting the **To change the estimates for fiscal year *nnnn* click here.** An email notification will be sent to NSF that a new report has been resubmitted for review.
- If you have submitted a report to NSF and NSF has accepted the report, you may still resubmit the report by selecting the **To change the estimates for fiscal year *nnnn* click here**link. NSF will be notified and presented with both the new report and the previously accepted report for review. NSF may either accept the new report or accept the prior report.

For further information on facility reporting, see:

- Operations Reports
- Construction/Upgrade Report
- Earned Value Management for a Construction Report

Navigating the FPRS

The Facility Performance Reporting System (FPRS) is divided into two phases: an Estimated reporting cycle, which runs from approximately January 1 through April 30, and an Actuals reporting cycle, which runs from approximately October 1 through December 31. Principal Investigators (PIs) who are responsible for large NSF facilities projects are required to enter data for both phases within the prescribed time-frames. All facilities performance data will be entered through the NSF FastLane application.

User Access Levels

Designated PIs who are required to submit facility reports can access the FPRS from NSF's FastLane system, http://fastlane.nsf.gov. To access FPRS, you must be a FastLane user.

FPRS Login Instructions

You, as a Principal Investigator (PI), must log into FastLane and select the **GPRA Performance Facility Reporting System** link to access the Facility Performance Reporting module.

1. From the **FastLane Homepage** screen, (Figure 1), select the **Proposals, Awards & Status** link located on the left portion of the top menu bar. The **Proposals, Awards & Status Login screen** (Figure 2) **displays.**

Figure 1 FastLane Homepage screen. The Proposals, Awards and Status link is boxed in red.

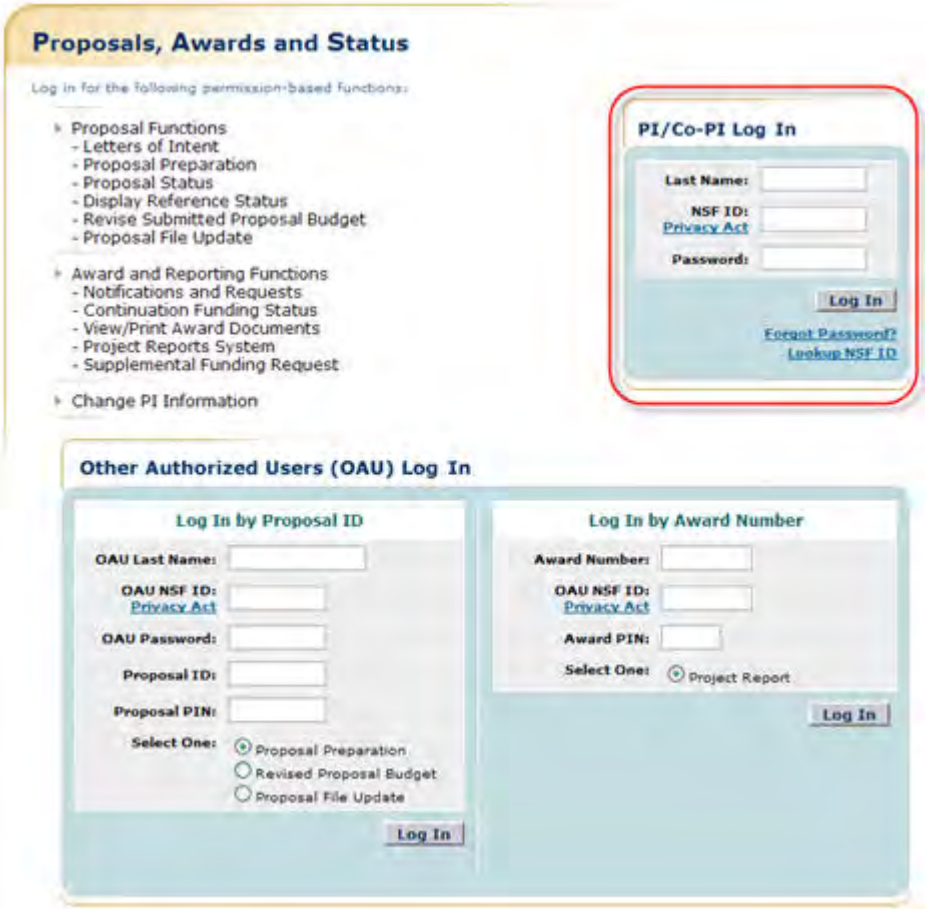


Figure 2 Proposals, Awards & Status Login screen. The PI/Co-PI Log In is boxed in red.

2. From the **Proposals, Awards & Status Login** screen (Figure 2), complete the following fields: Last Name, National Science Foundation Identification number, and Password on the **PI/Co-PI Log In**. Once you have entered your login information, select the **Login** button, to enter the Proposals, Awards, and Status FastLane module. The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management screen** (Figure 3) displays.
1.

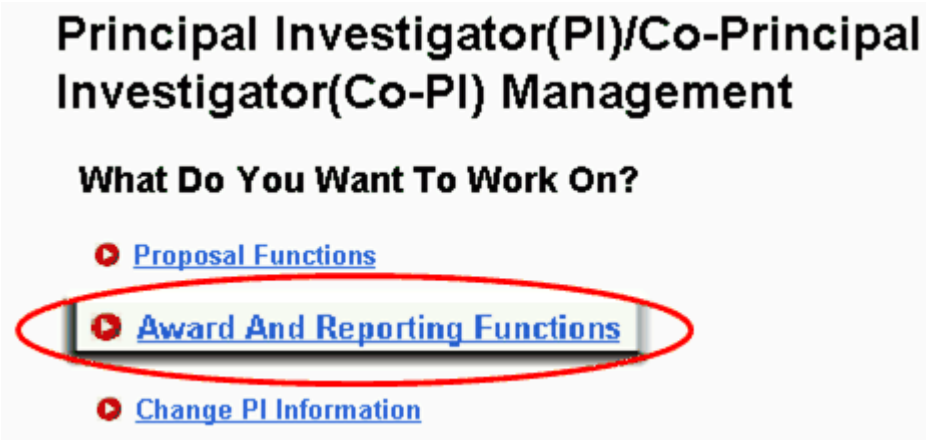


Figure 3 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management screen. The Award and Reporting Functions item is circled in red.

3. From the **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management** screen (Figure 3), select the **Award and Reporting Functions** link. The **Award and Reporting Functions** (Figure 4) **screen** displays.

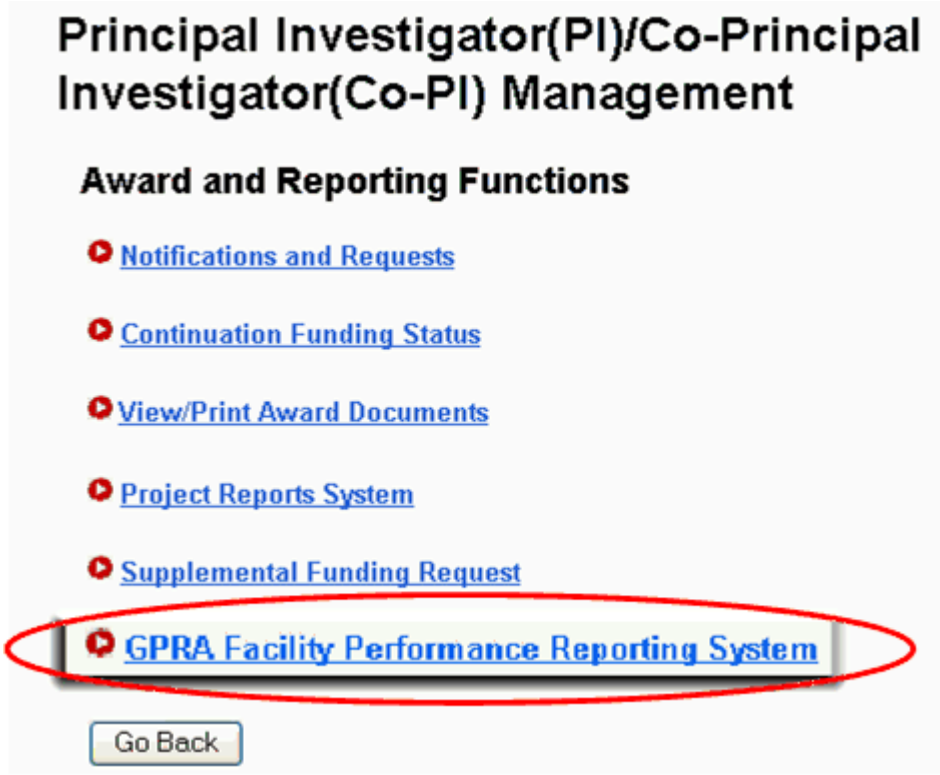


Figure 4 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Award and Reporting Functions screen. The GPRA Facility Performance Reporting System Functions item is circled in red.

4. From the **Award and Reporting Functions** (Figure 4) **screen**, select the **GPRA Facility Performance Reporting System** link. The main **FPRS Splash screen** (Figure 5) displays, providing high-level information on the functions of FPRS.

The NSF's Government Performance & Results Act Performance Plan contains goals related to the construction/upgrade and operations of NSF-supported facilities. These goals are as follows:

- **Construction/Upgrade:** For 90 percent of construction, acquisition and upgrade projects, keep any negative cost and schedule variances to less than 10 percent of the approved project plan.
- **Operations:** For 90 percent of operational facilities, keep scheduled operating time lost to less than 10 percent.

In order to assess progress relative to these goals, the Foundation requires facilities to submit two types of performance reports. Facilities which receive greater than $1 million per year in operations support are required to fill out reports on their operations activities. Facilities which are undergoing individual construction/upgrade activities over $5 million total are required to fill out a Construction/Upgrade report. Each construction/upgrade project must be reported on separately.

Reports must cover the federal fiscal year, October 1st - September 30th.

To continue on to the GPRA Facility Performance Reporting module, click on the button below:

Facility Performance Reporting

Figure 5 FPRS Splash screen.

5. From the main **FPRS Splash screen** (Figure 5), select the **Facility Performance Reporting** button. The **Facility List screen** (Figure 6) displays. This page lists all of the Operations and/or Construction/Upgrade reports that you have access to as a PI and for which you must report performance data.

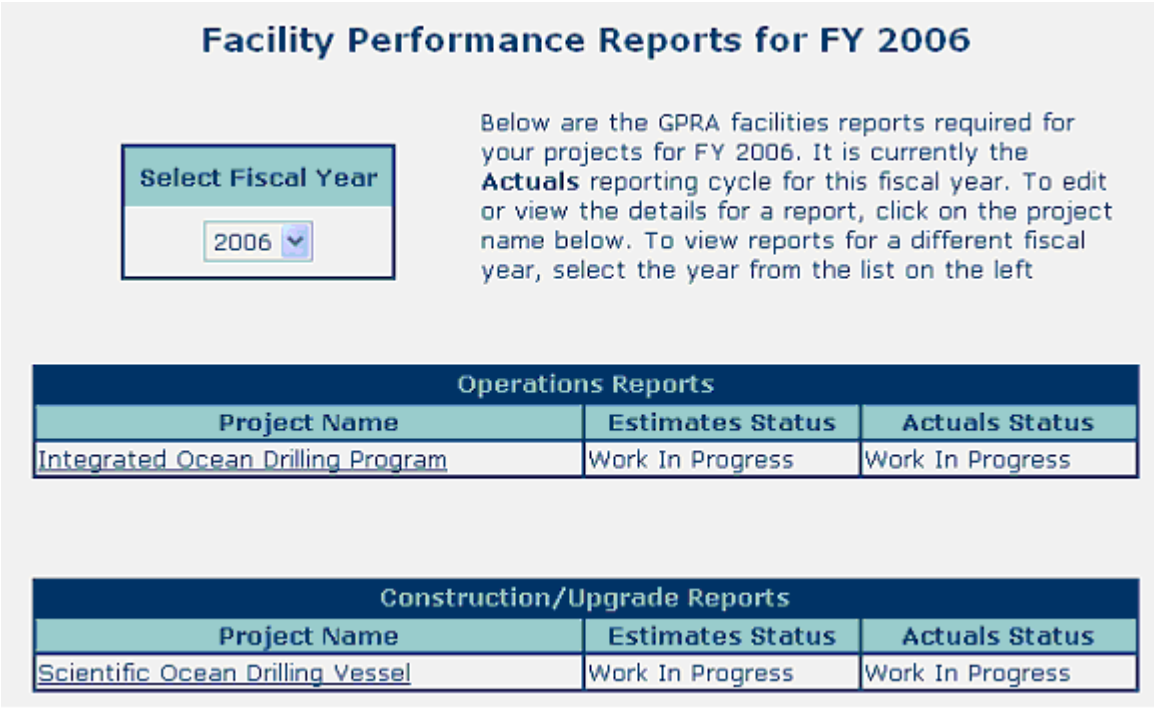


Figure 6 Facility List screen.

You have successfully entered the FPRS module in the FastLane system and should see the **Facility List screen** (Figure 6), a list of each of your facility projects requiring reports. In most cases, you will only see one facility (either an Operations or Construction/ Upgrade project—this illustration shows both).

6. The **Select Fiscal Year** drop-down list option defaults to the fiscal year of the current reporting period. You will be presented with relevant operations reports or construction/upgrade reports or both. The list of facilities reports will be driven by data contained in the NSF Financial Accounting System (FAS). By changing the fiscal year, you may view prior year submissions. The narrative section in the upper right corner describes the current reporting cycle and instruction to view reports. The reports menu displays the report access link necessary to enter the **FPRS Report Detail screen**.

See Operations Report and Construction/Upgrade Report for step-by-step instructions.

Email Notifications

FPRS has an email notification mechanism as a part of the overall reporting process. There are two types of email templates in FPRS—Workflow Notification Emails and Cycle Notification Emails.

Workflow Notification Emails

Workflow Notification Emails are sent in response to an action related to the Workflow States, as seen in Table 1.

Table 1 Workflow State and Workflow Notification Emails

Workflow State	Workflow Notification Email
PI submits a report	Email sent to the Program Officer at NSF to review the report
NSF reopens report	Email sent to PI to review NSF comments and resubmit report
NSF accepts report	Email sent to PI that the report is accepted by NSF and no further action is required

Cycle Notification Emails

Cycle Notification Emails are sent to all users of FPRS notifying them of the opening and closing of an estimates or actuals reporting cycle. At the end of a reporting cycle, email reminders will be sent out a few days before the closing date to those users who still have pending action in FPRS.

For further information on reporting requirements, see:

- Operations Reports
- Construction/Upgrade Report
- Earned Value Management for a Construction Report

Operations Reports

Operations Reports

The Operations Report compares the Estimated Allocation of user units at the beginning of the fiscal year with the Actual Allocation of user units at the end of the fiscal year. The user unit information for an Operations Report is tracked yearly.

This section details the actions that you can perform on an Operations Report and the steps that you must take to view, save, submit, and resubmit estimates and actuals performance data for an Operations Reports.

Upon FPRS login, you will be presented with a list of your reports for a given fiscal year. FPRS will default to the current fiscal year. You may change the fiscal year by selecting the Select Fiscal Year drop-down list. Changing the selection in this box will automatically display reports that are available for the newly selected fiscal year. If you are required to report on operations and construction/upgrade activities, both reports will be accessible from the **Facility List** screen (Figure 1). Each report will list the project name and the current workflow state of the estimates and actuals reporting cycles in the columns titled, *Estimates Status* and *Actual Status*.

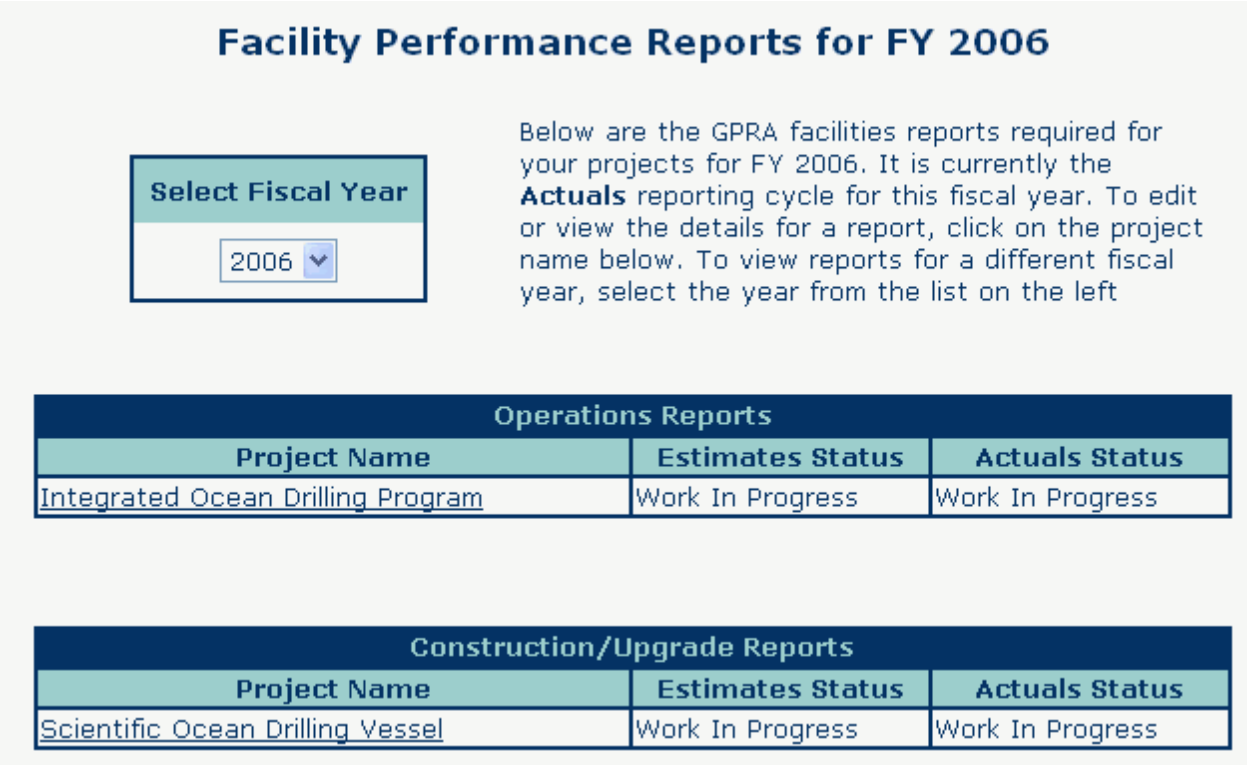


Figure 1 Facility List screen.

To view the **Report Details** screen, select the **Project Name** from the Facility List screen (Figure 1). You will now be accessing an Operations Report for the estimates reporting cycle that has a status of Work In Progress. Figure 2 shows an Operations Report that is still in progress.

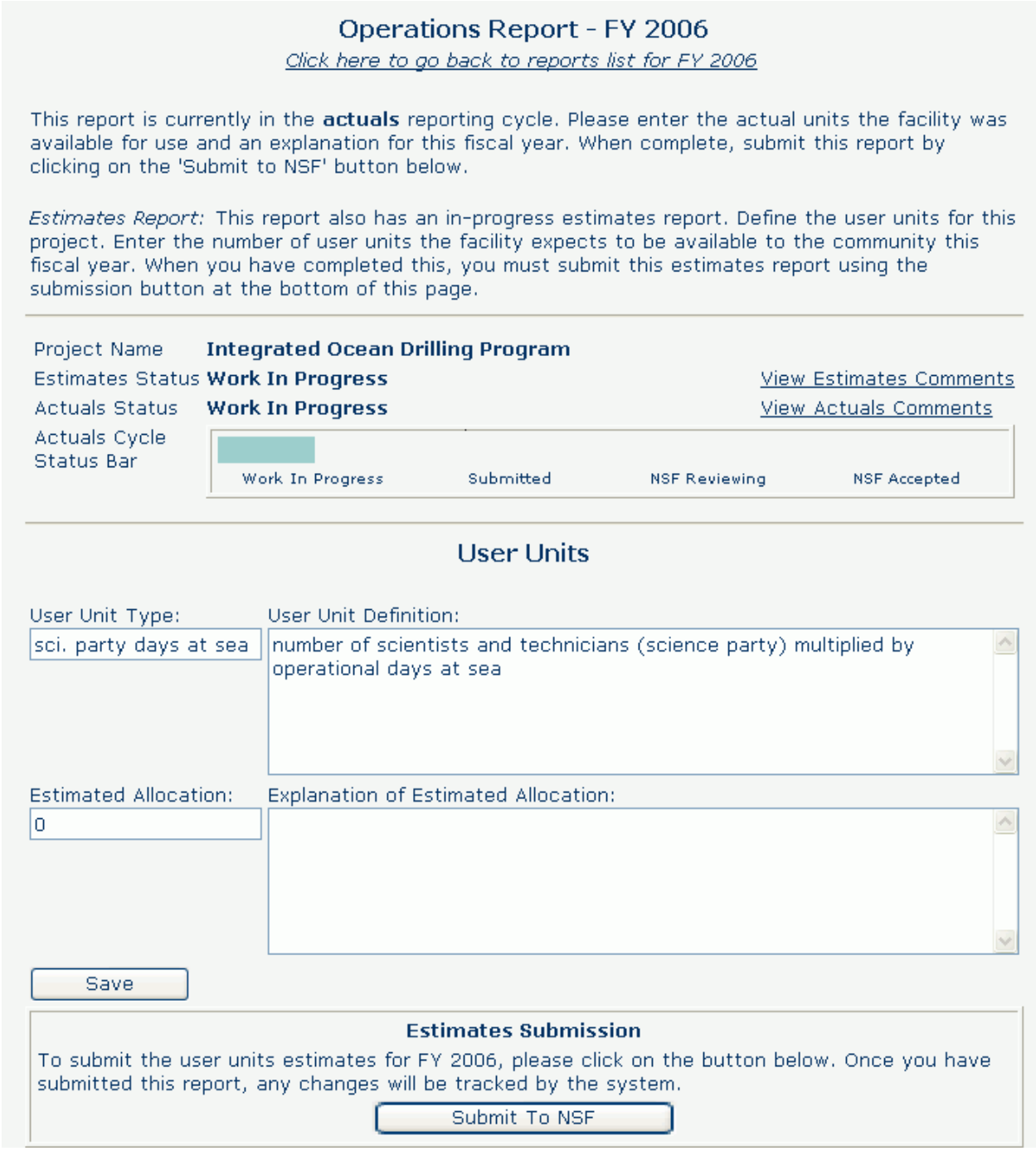


Figure 2 Operations Report In Progress before any work is started.

To provide you with information about where you are in the reporting cycle, a visual status bar is displayed under the current status (Figure 3).

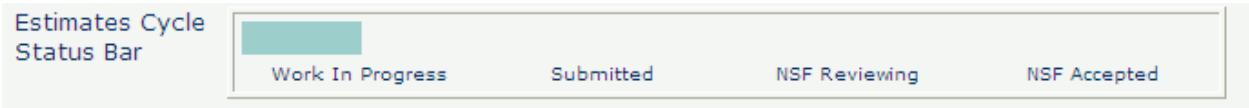


Figure 3 Status Bar in Estimates Cycle.

The status bar indicates the reporting steps and how much progress has been made on those steps. Reporting steps and their meanings are as follows:

- **Work In Progress**—PI has begun entering facilities operations report data or is revising facilities data based on NSF feedback
- **Submitted**—PI has submitted facilities operations report data
- **NSF Reviewing**—NSF Program Officers (POs) are reviewing submitted facilities data. Office of Budget, Finance and Award Management (BFA) is reviewing submitted facilities data
- **NSF Accepted**—Both POs and BFA have accepted the report.

See also:

- View an Estimates Operations Report
- Submit an Estimates Operations Report
- Actuals Operations Report
- Performance Data in an Actuals Operations Report
- Submit an Actuals Operations Report
- Resubmit an Operations Report

See also:

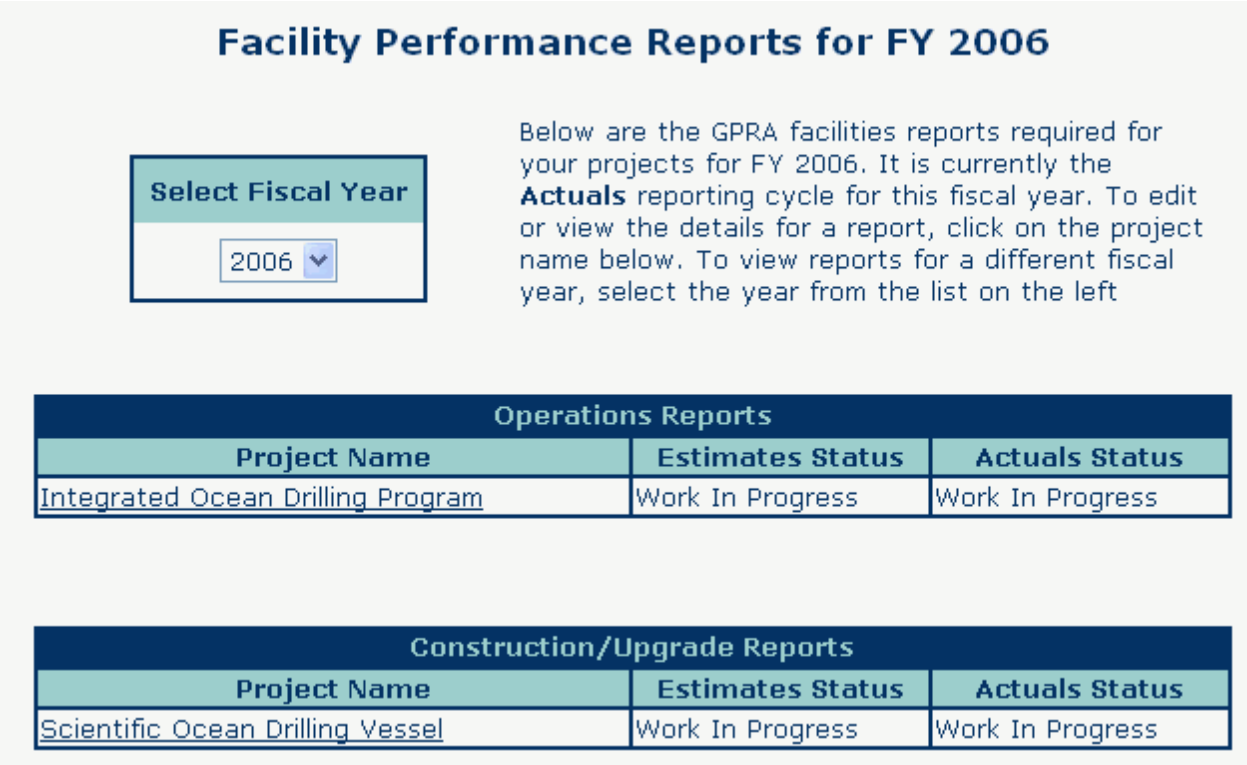
- An Introduction to the NSF Facility Performance Reporting System
- Construction/Upgrade Report
- Earned Value Management for a Construction Report

Operations Reports

The Operations Report compares the Estimated Allocation of user units at the beginning of the fiscal year with the Actual Allocation of user units at the end of the fiscal year. The user unit information for an Operations Report is tracked yearly.

This section details the actions that you can perform on an Operations Report and the steps that you must take to view, save, submit, and resubmit estimates and actuals performance data for an Operations Reports.

Upon FPRS login, you will be presented with a list of your reports for a given fiscal year. FPRS will default to the current fiscal year. You may change the fiscal year by selecting the Select Fiscal Year drop-down list. Changing the selection in this box will automatically display reports that are available for the newly selected fiscal year. If you are required to report on operations and construction/upgrade activities, both reports will be accessible from the **Facility List** screen (Figure 1). Each report will list the project name and the current workflow state of the estimates and actuals reporting cycles in the columns titled, *Estimates Status* and *Actual Status*.



Facility Performance Reports for FY 2006

Select Fiscal Year

2006

Below are the GPRA facilities reports required for your projects for FY 2006. It is currently the **Actuals** reporting cycle for this fiscal year. To edit or view the details for a report, click on the project name below. To view reports for a different fiscal year, select the year from the list on the left

Operations Reports		
Project Name	Estimates Status	Actuals Status
Integrated Ocean Drilling Program	Work In Progress	Work In Progress

Construction/Upgrade Reports		
Project Name	Estimates Status	Actuals Status
Scientific Ocean Drilling Vessel	Work In Progress	Work In Progress

Figure 1 Facility List screen.

To view the **Report Details** screen, select the **Project Name** from the Facility List screen (Figure 1). You will now be accessing an Operations Report for the estimates reporting cycle that has a status of Work In Progress. Figure 2 shows an Operations Report that is still in progress.

Figure 2 Operations Report In Progress before any work is started.

To provide you with information about where you are in the reporting cycle, a visual status bar is displayed under the current status (Figure 3).

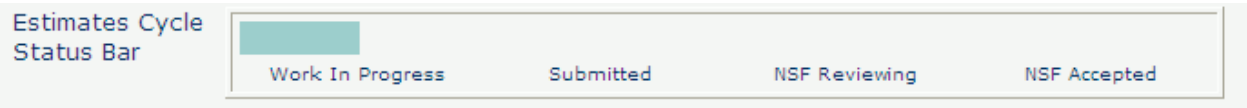


Figure 3 Status Bar in Estimates Cycle.

The status bar indicates the reporting steps and how much progress has been made on those steps. Reporting steps and their meanings are as follows:

- **Work In Progress**—PI has begun entering facilities operations report data or is revising facilities data based on NSF feedback
- **Submitted**—PI has submitted facilities operations report data
- **NSF Reviewing**—NSF Program Officers (POs) are reviewing submitted facilities data. Office of Budget, Finance and Award Management (BFA) is reviewing submitted facilities data
- **NSF Accepted**—Both POs and BFA have accepted the report.

See also:

- View an Estimates Operations Report
- Submit an Estimates Operations Report
- Actuals Operations Report
- Performance Data in an Actuals Operations Report
- Submit an Actuals Operations Report
- Resubmit an Operations Report

See also:

- An Introduction to the NSF Facility Performance Reporting System
- Construction/Upgrade Report
- Earned Value Management for a Construction Report

View an Estimates Operations Report

There are three sections contained on the **Report Detail** screen for an Estimates Operations Report:

- At the top of the screen, you can view the Operations Report header information describing the current reporting cycle along with instructions.
- The next section presented is the Project Status, listing the Project Name, Estimates Status, Estimates Cycle Status Bar, and a **View Estimates Comments** link. The **View Estimates Comments** link displays all comments entered by you and PO. This link is useful to determine why NSF has returned a report to you.
- Estimates Report section, displaying the enabled *User Unit Type*, *User Unit Definition, Estimated Allocation,* and *Explanation of Estimated Allocation* data fields. You may either save the report, indicating that it is still a Work In Progress, or submit the report to NSF for review and acceptance.

The required performance data of an Operations Report for the estimates reporting cycle is as shown in Table 1.

Table 1 Operations Report

Performance Data	Definition
User Unit Type	The standard unit of measure in which the facility tracks the amount of service it provides (i.e., minute, hour, day, CPU hour, etc.). It is a text field that is required.

User Unit Definition	Description of the type of service that the facility provides to its community such as: • 1 hour of viewing time at a telescope • 1 day at sea on a research vesse • 1 CPU hour • This is a text field that is required
Estimated Allocation	The estimated number of user units that the facility expects to make available to users for the federal fiscal year. This field is an integer and is required.
Explanation of Estimated Allocation	Provides PI with an opportunity to describe relevant information pertaining to the estimated allocation. It is a text field that is required.

You should already be familiar with the estimates performance data, as the report components have not changed significantly from previous reporting years.

The steps for entering and completing an Operations Report for the estimates reporting cycle are described in Submit an Estimates Operations Report.

See also:
- Actuals Operations Report
- Performance Data in an Actuals Operations Report
- Submit an Actuals Operations Report
- Resubmit an Operations Report

Submit an Estimates Operations Report

Email notifications will be distributed to all the PIs required to submit an Operations Report for large facilities projects once the estimates reporting cycle is opened.

1. To submit an Operations Report for the estimated reporting cycle, you must first navigate to the Operations Report Detail screen (Figure 1) (see Navigating the FPRS). You will be presented with any and all actions that are applicable to you. The actions available to you are based on the status of the current report (see Workflow).

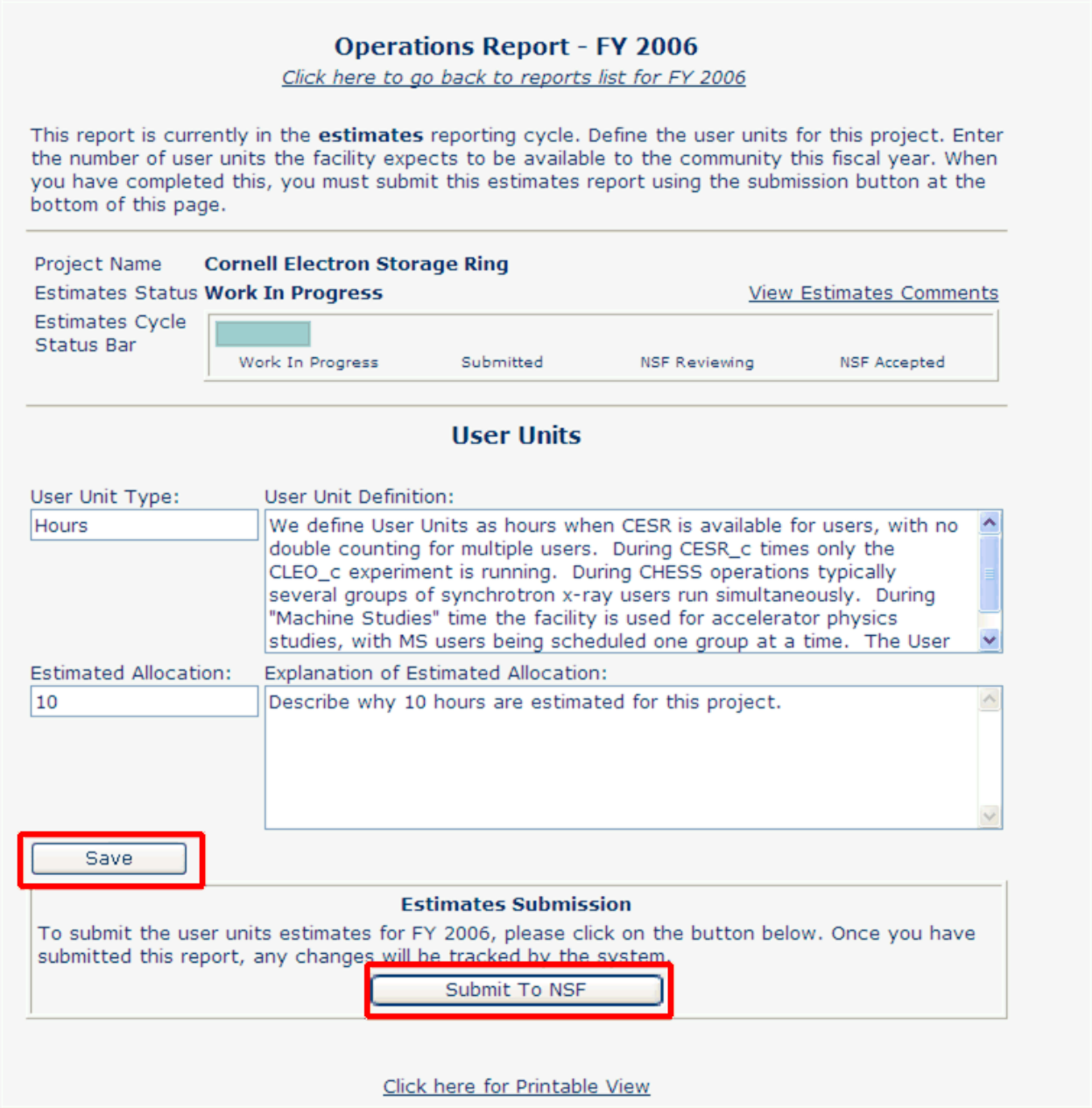


Figure 1 Estimates Operations Report. The estimate entered and Save and Submit to NSF buttons are boxed in red.

2. To submit an Operations Report for the estimates reporting cycle, you should be prepared to enter your performance data. The screen should resemble Figure 1.
3. Upon completing the estimate, select the **Save** button.
4. Submit the report to NSF by selecting the **Submit to NSF** button at the bottom of the screen. The **Confirm Submission** screen displays (Figure 2).

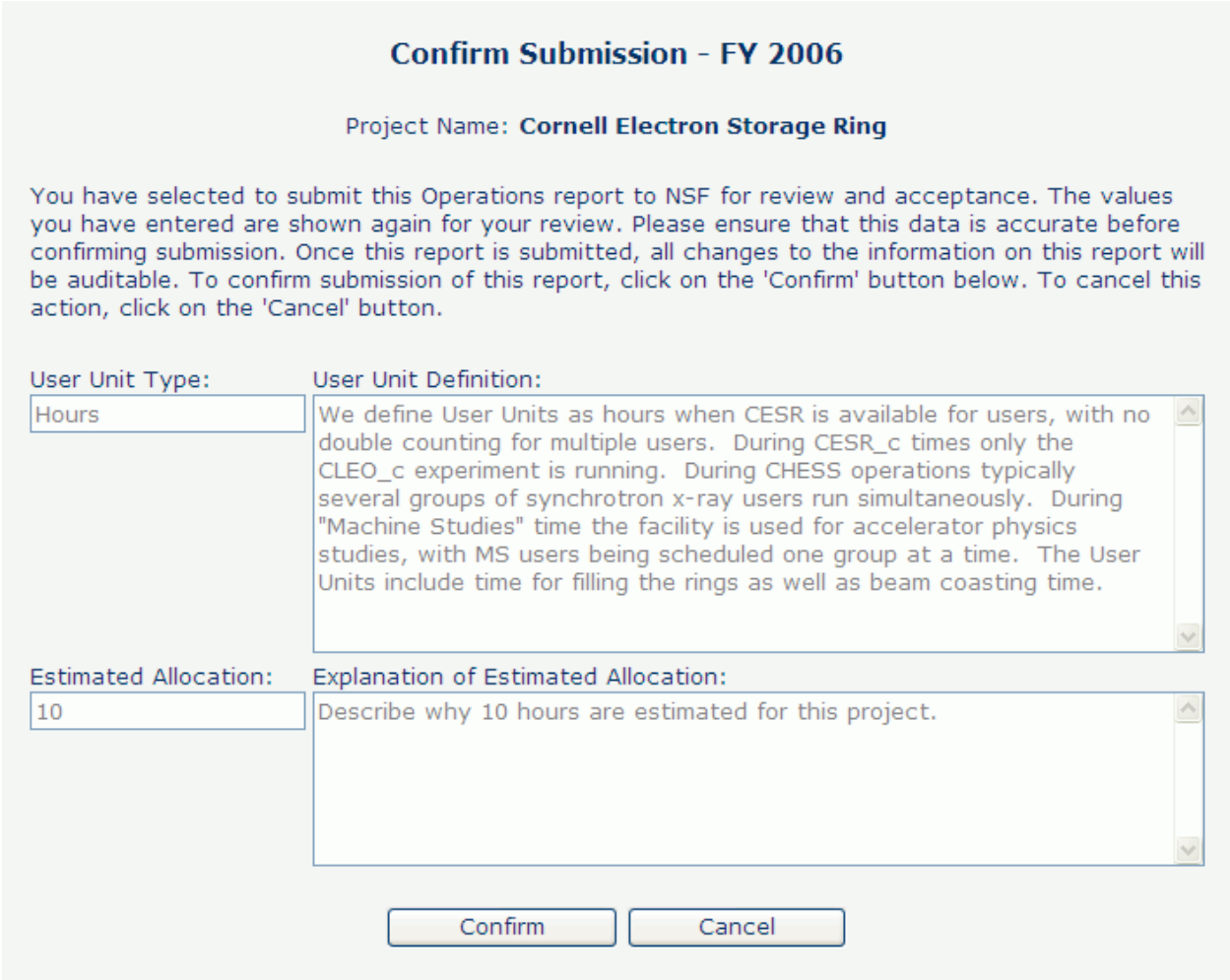


Figure 2 Confirm Submission Screen for the Estimates Operations Report.

5. You should verify the information contained in the report and choose the **Confirm** button to submit the report to NSF or the **Cancel** button to return to the **Operations Report Detail** screen to edit the report further. When you select the **Confirm** button, the **Submit Success** screen will be displayed as in Figure 3. This indicates that the Operations Report for the estimates reporting cycle has been successfully submitted to NSF. NSF will receive an email notification that a report has been submitted to be reviewed.

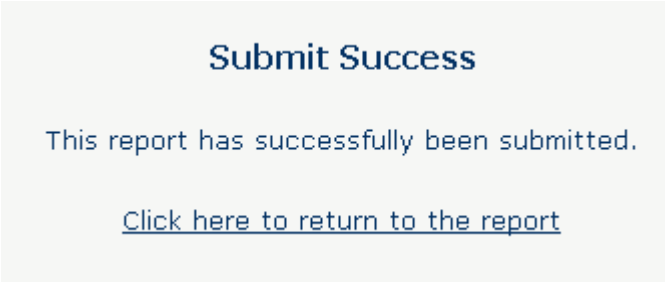


Figure 3 Estimates Operations Report, Submit Success screen.

6. Select the **Click here to return to the report** link to return to the **Operations Report Detail** screen (Figure 4). The Operations Report will be read-only to you during NSF's review.

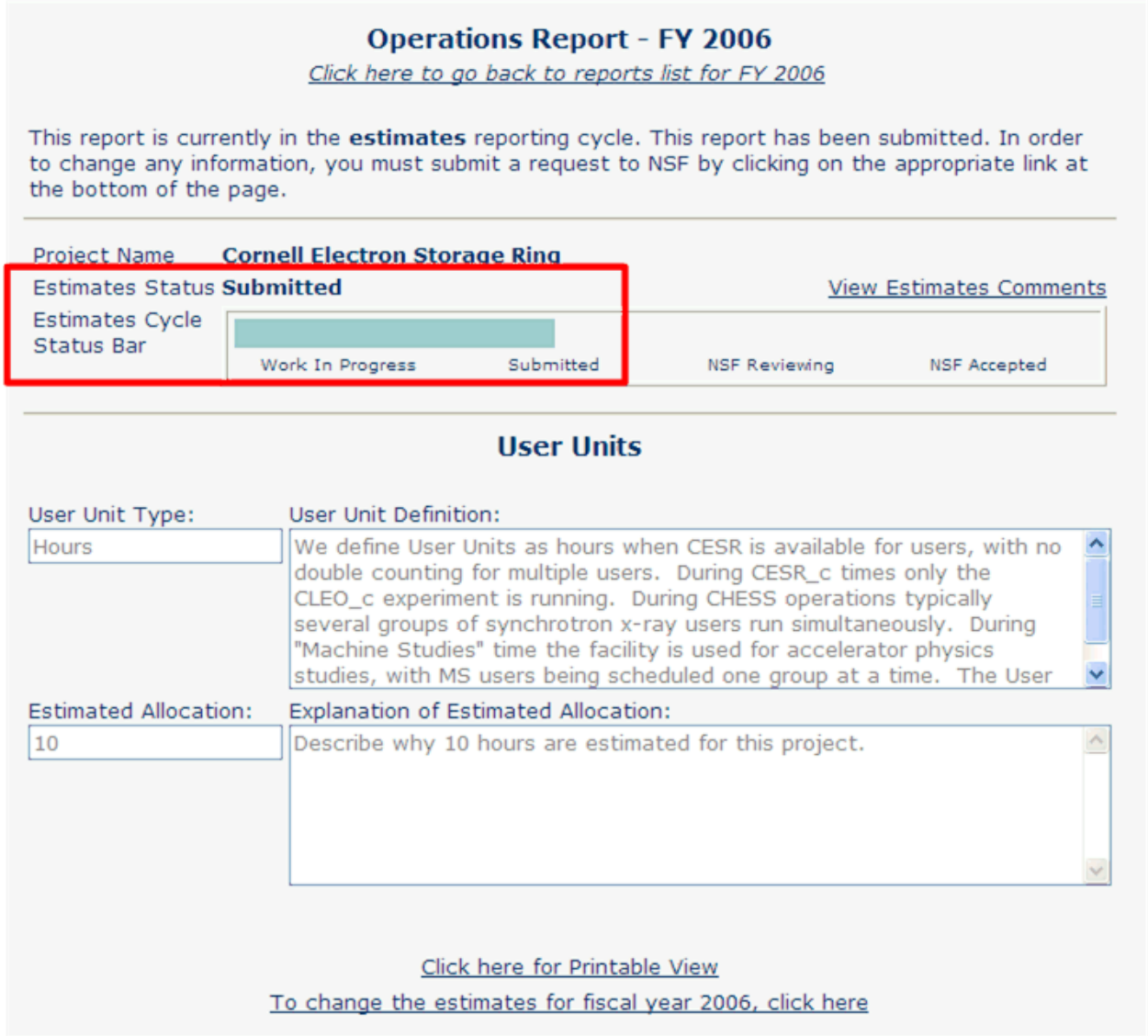


Figure 4 Operations Report Detail screen after Estimates Submission. Sections showing changes are boxed in red.

Upon submission and NSF review, you will be notified by email once NSF accepts the report. If NSF accepts the report, the report is marked "Complete" for the estimates reporting cycle.

Processing a Reopened Estimate

However, if NSF returns the report, you will be notified by email to login into FPRS and resubmit the Estimates Report. You have the capability to access FPRS throughout this process to view the current status of the report on the **Operations Report Detail** screen.

The **Facility List** screen will also keep you posted on the current status of your report (Figure 5 shows the reopened status).

Operations Reports		
Project Name	**Estimates Status**	**Actuals Status**
Integrated Ocean Drilling Program	Reopened	N/A

Figure 5 Facility List screen for Operations Report showing the Estimate in Reopened Status.

1. To resubmit a returned Estimates Report, access the **Operations Report Detail** screen for the returned report (Figure 6). Notice that the current status is "Reopened" and that the data fields are open for revision.

Figure 6 Estimates Operations Report, Reopened by NSF. The changed sections are enclosed in red boxes. The View Estimates Comments link is circled in red.

2. FPRS provides a mechanism for NSF to comment to you. Select the **View Estimates Comment**s link to view NSF comments (Figure 7). A pop-up window displays, containing all comments entered by NSF and you.

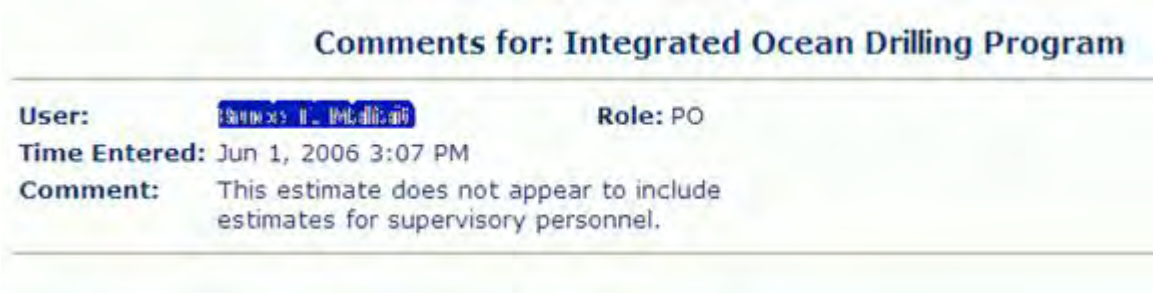


Figure 7 Estimates Operations Report, NSF Comments displayed.

3. Review your previous submission and revise the relevant data. Once these changes are made, you may either **Save** or **Submit to NSF** exactly as described in submitting the original report. Once NSF accepts the Operations Report estimate, the **Operations Report Detail** screen will be displayed similar to Figure 8.

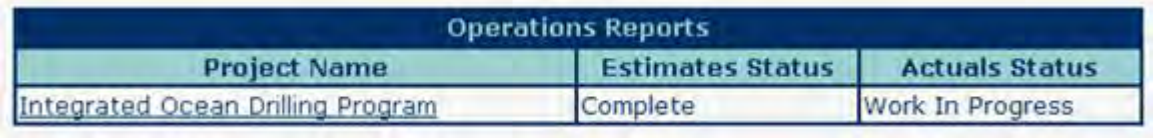
Figure 8 Operations Estimates Report, Complete.

See also:

- View an Estimates Operations Report
- Actuals Operations Report
- Performance Data in an Actuals Operations Report
- Submit an Actuals Operations Report
- Resubmit an Operations Report

Actuals Operations Report

Upon FPRS login (see Navigating the FPRS), you will be presented with a list of your reports for a given fiscal year (as seen in Figure 1). FPRS will default to the fiscal year for which data is being collected. Select a Report Name to access the **Operations Report Detail** screen for that report.



Operations Reports

Project Name	Estimates Status	Actuals Status
Integrated Ocean Drilling Program	Complete	Work In Progress

Figure 1 Facility List screen withActuals In Progress Status.

View an Actuals Operations Report

You can access the **Operations Report Detail** screen, Figure 2, to view the report details for the actuals reporting cycle.

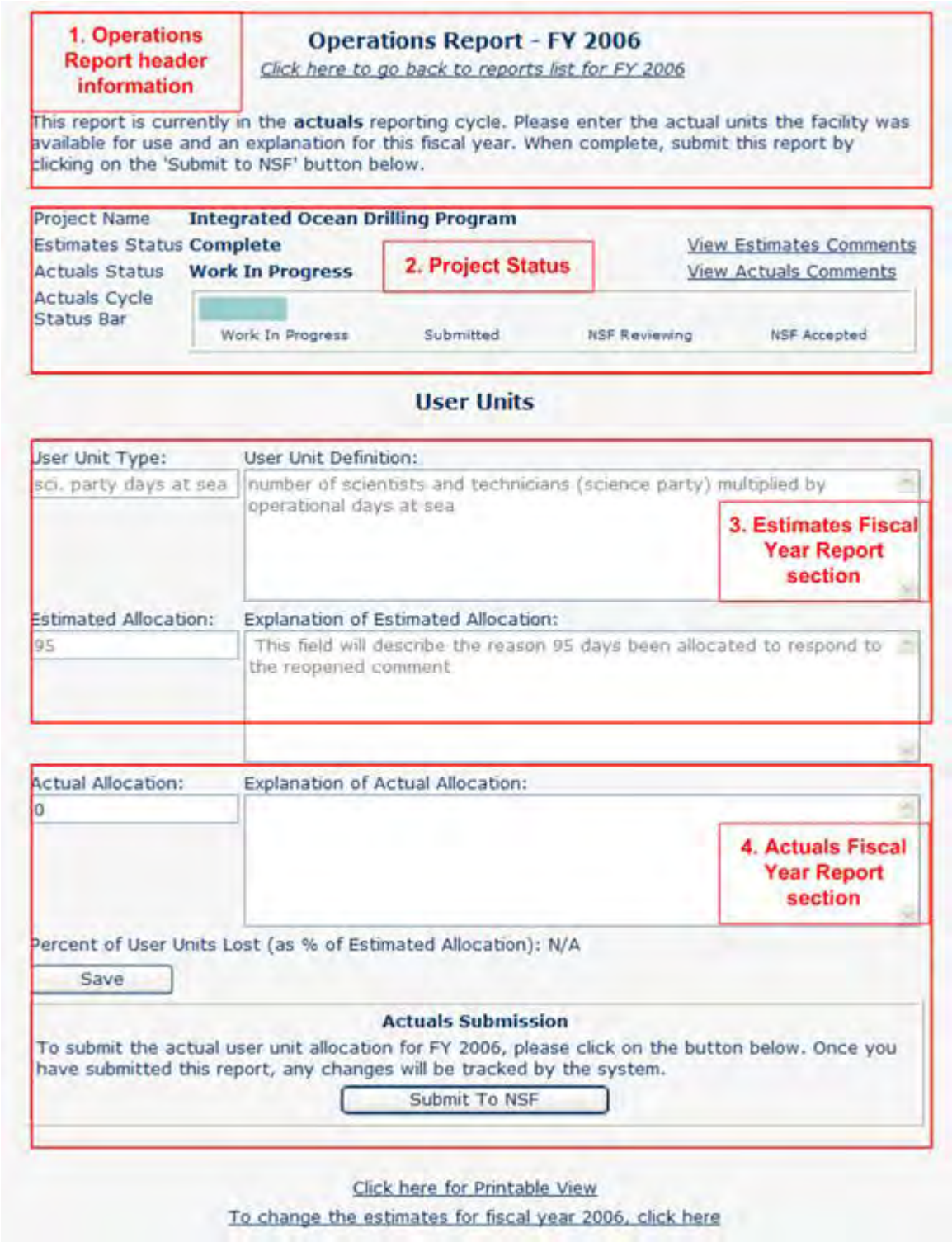


Figure 2 Actuals Operations Report, Work In Progress. The four sections of the report are marked in red. See the explanations below for further information.

There are four sections contained within the **Report Detail** screen for an Actuals Operations Report:

- At the top of the screen, you can view the Operations Report header information describing the current reporting cycle along with instructions.
- The next section presented is the Project Status, listing the *Project Name*, *Estimates Status*, *Actuals Cycle Status Bar*, a **View Estimates Comments** link, and a **View Actuals Comments** link. Each of the View Comments links displays all comments entered by you and the PO for the associated reporting cycle. These links are useful to determine why NSF has returned a report to you.
- Estimates Fiscal Year Report section, displaying the *User Unit Type*, *User Unit Definition, Estimated Allocation,* and *Explanation of Estimated Allocation*. These are read-only during the actuals reporting cycle.
- Actuals Fiscal Year Report section, displaying the *Actual Allocation* and *Explanation of Actual Explanation*.

See also:

- View an Estimates Operations Report
- Submit an Estimates Operations Report
- Performance Data in an Actuals Operations Report
- Submit an Actuals Operations Report
- Resubmit an Operations Report

Performance Data in an Actuals Operations Report

The required performance data for an Operations Report for the actuals reporting cycle is as described in Table 1.

Table 1 Operations Report—Actuals Reporting Cycle

Performance Data	Definition
Actual Allocation	The actual number of user units that *were available* to the users during the federal fiscal year. This field is an integer and is required.
Explanation of Actual Allocation	Provides PI with an opportunity to describe relevant information pertaining to the actuals allocation. It is a text field and is required.

You should already be familiar with the actuals performance data, as the report components have not changed significantly from previous reporting years.

The steps for entering and completing an Operations Report for the actuals reporting cycle are described in Submit an Actuals Operations Report.

See also:

- View an Estimates Operations Report
- Actuals Operations Report
- Submit an Actuals Operations Report
- Resubmit an Operations Report

Submit an Actuals Operations Report

Email notifications will be distributed to all the PIs required to submit an Operations Report for large facilities projects once the actuals reporting cycle is opened.

1. To submit an Operations Report for the actuals reporting cycle, you must first navigate to the **Operations Report Detail** screen (Figure 1) (see Navigating the FPRS). You will be presented with any and all actions that are applicable to you. The actions available to you are based on the status of the current report (see Workflow).

Figure 1 Actuals Operations Report, Work In Progress.

2. To submit an Operations Report for the actuals reporting cycle, you should be prepared to enter your performance data. The screen should resemble Figure 1.

3. Upon entering your performance data, you may select the **Save** button to save the report in FPRS. This action does not submit the report. The save action indicates that the report is still a Work In Progress, and you may return to the report to continue working at a later time.
4. Upon completing the report, you should submit the report to NSF by selecting the **Submit to NSF** button at the bottom of the **Operations Report** screen. The submit action will subsequently display the **Confirm Submission** screen (Figure 2).

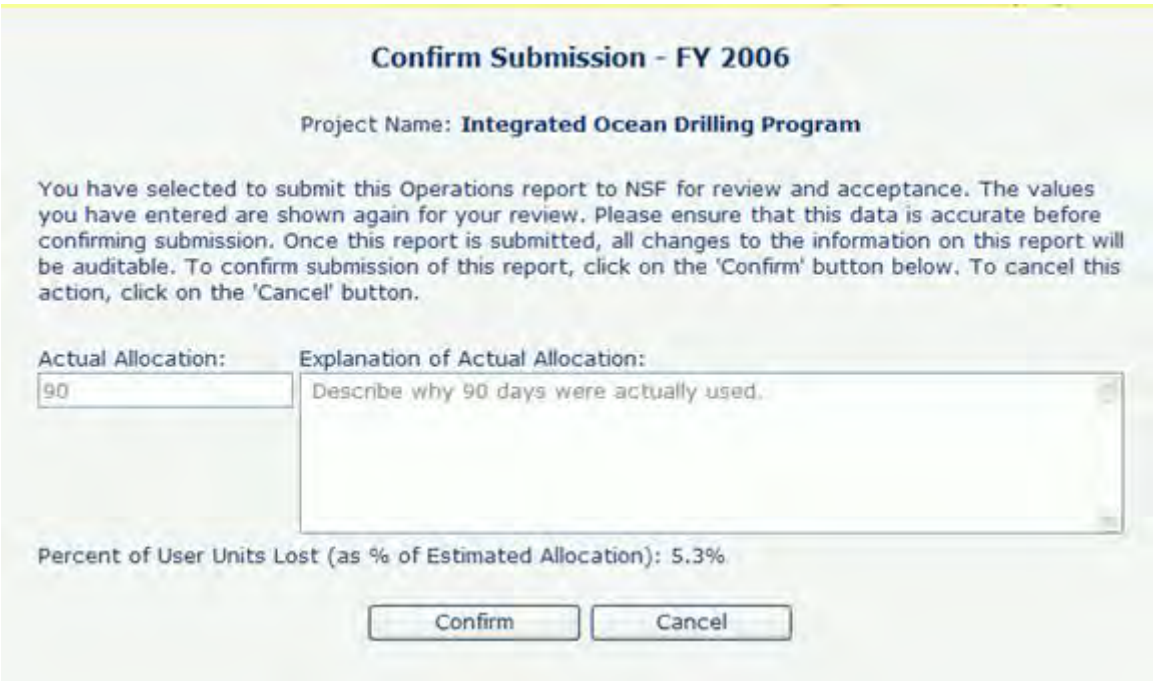


Figure 2 Operations Actual Report—Confirm Submission screen.

5. Verify the information contained in the report and choose **Confirm** to submit the report to NSF or **Cancel** to return to the **Operations Report Detail** screen to edit the report further.
6. On the **Confirm Submission** screen (Figure 2), after you select the **Confirm** button, the **Submit Success** screen will be displayed (Figure 3). This indicates that the Operations Report for actuals cycle has been successfully submitted to NSF. NSF will receive an email notification to review.

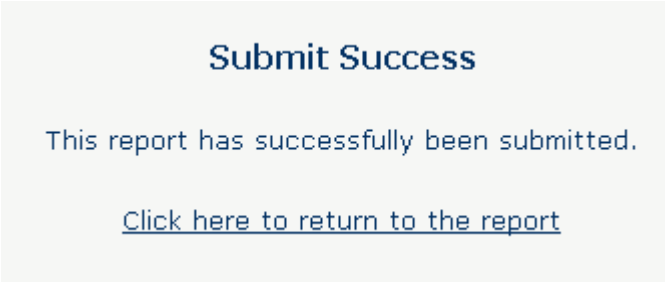


Figure 3 Actuals Operations Report, Submit Success.

7. Select the **Click here to return to the report** link to return to the report. The Operations Report will be read-only to you during NSF's review.

   Upon submission and NSF review, you will be notified by email once NSF accepts the report. If NSF accepts the report, the report is marked "Complete" for the actuals reporting cycle.

   However, if NSF returns the report, you will be notified by email to login into FPRS and resubmit the report. You have the capability to access FPRS throughout this process to view the current status of the report on the **Operations Report Detail** screen. The **Facility List** screen will also keep you posted on the current status of your report (Figure 4 shows the reopened status).

Operations Reports		
Project Name	Estimates Status	Actuals Status
Integrated Ocean Drilling Program	Complete	Reopened

Figure 4 Facility List screen with Actuals Reopened Status.

8. To resubmit a returned actuals report, access the **Operations Report Detail** screen for the returned report (Figure 5). The current status is "Reopened" and the actuals data fields are open for revision.

Figure 5 Actuals Operations Report, Reopened by NSF, as indicated in the items inside the red boxes.

9. FPRS provides a mechanism for NSF to comment to you. Select the **View Actuals Comments** link to view NSF comments. A pop-up window displays containing all comments entered by NSF and you.

10. You should review your previous submission and revise the relevant data. Once these changes are made, you may either **Save** or **Submit to NSF** exactly as described in Step 4 (above). Once NSF accepts the Operations Report, the report status goes to "Complete" (see Figure 6).

Operations Reports		
Project Name	**Estimates Status**	**Actuals Status**
Integrated Ocean Drilling Program	Complete	Complete

Figure 6 Facility List screen with Actuals Complete Status.

11. Select the report name and then the **Operations Report Detail** screen will be displayed, Figure 7.

Figure 7 Actuals Operations Report, Complete.

See also:

- View an Estimates Operations Report
- Submit an Estimates Operations Report
- Actuals Operations Report
- Performance Data in an Actuals Operations Report
- Resubmit an Operations Report

Resubmit an Operations Report

FPRS is designed to provide you with flexibility in reporting to NSF. Therefore, FPRS gives you the capability to resubmit reports if corrections are required. This ensures that you are always comfortable and confident in the data submitted to NSF. The overarching guidelines defined by NSF are:

- **Guideline 1.** Estimated performance data can be resubmitted during the estimates or actuals reporting cycles, but NSF must accept the changes.
- **Guideline 2.** Actual performance data can be resubmitted during the actuals reporting cycle only. Actual performance data does not exist during the estimates reporting cycle, and therefore, it is not available in FPRS.
- **Guideline 3.** Once the fiscal year is closed for reporting by NSF, the Operations Report is made available as read-only.

FPRS recognizes three types of resubmission conditions that apply to both the estimates and actuals reporting cycles.

- **Reopened**: If you have submitted a report and NSF has returned the report, you have the capability to view NSF comments for revision, revise the report, and resubmit an updated report.
- **Submitted**: If you have submitted a report to NSF and this report has not been reviewed or accepted by NSF, you may resubmit the report with the new values to be accepted by NSF.
- **Under Review** or **Completed**: If you have submitted a report to NSF and NSF has begun to review or has accepted this report, you may still resubmit the report. FPRS will present NSF with both the new report and the previously accepted report for review. NSF may either accept the new report or accept the prior report.

The first condition, *Reopened*, has been described in detail in Submit a Reopened Estimates Operations Report and Submit a Reopened Actuals Operations Report sections. This section focuses on the two remaining conditions, *Submitted* and *Under Review or Completed*.

For a more detailed description of each state please refer to Workflow.

Resubmitting a Submitted Operations Report

This section identifies the process a PI would perform to change and resubmit a report that has already been submitted, but has not yet entered the Under Review state. This example follows the resubmission of an Actuals Operations Report. This process would execute exactly the same for an Estimates Operations Report.

You have already submitted an Actuals Operations Report. The report is currently read-only as all the data fields are closed for entry and the status is Submitted. Note this status in the **Facility List screen** (Figure 1).

Construction/Upgrade Reports		
Project Name	Estimates Status	Actuals Status
Scientific Ocean Drilling Vessel	Complete	Submitted

Figure 1 Facility List screen with Actuals Submitted status.

1. To resubmit actuals performance data, select the **To change the actuals for fiscal year *nnnn*, click here** link at the bottom of the report screen (see Figure 2 for this item, noted in a red box). Note that there is also a link to change the estimates report as well. Again, this is a component of the flexible design to accommodate NSF Guideline 1 above.

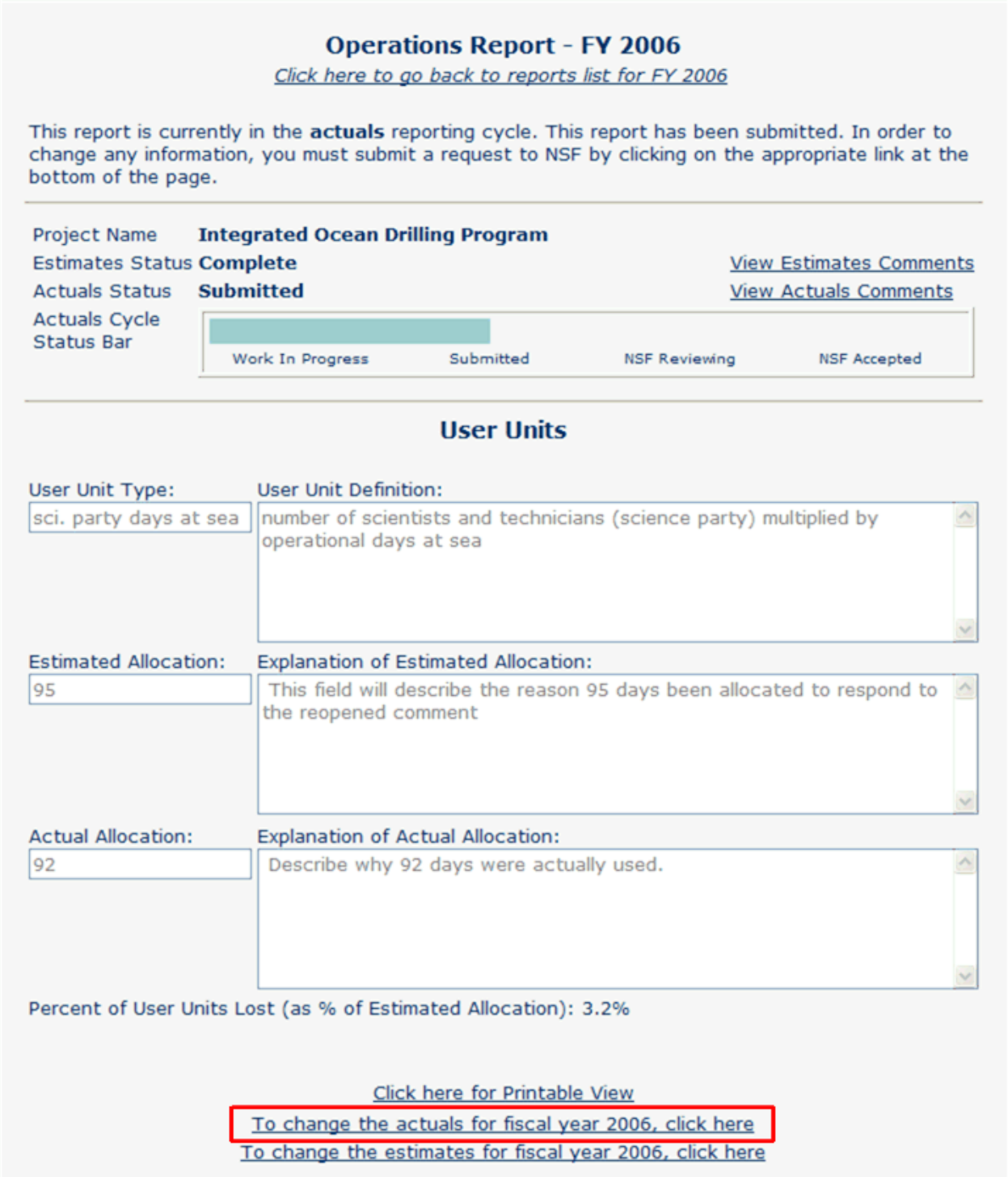


Figure 2 Actuals Operations Report, Submitted. The *To change the actuals for fiscal year nnnn, click here* link is boxed in red.

When you select the link, the **Request to Change Actuals** screen is displayed (Figure 3). The existing actuals data is shown and the data fields are open for your modification.

2. You should make the necessary revisions, and resubmit by selecting the **Submit to NSF** button. You will be required to enter a *Reason For Change* in the appropriate text box. This gives you an opportunity to state to NSF why changes are necessary.

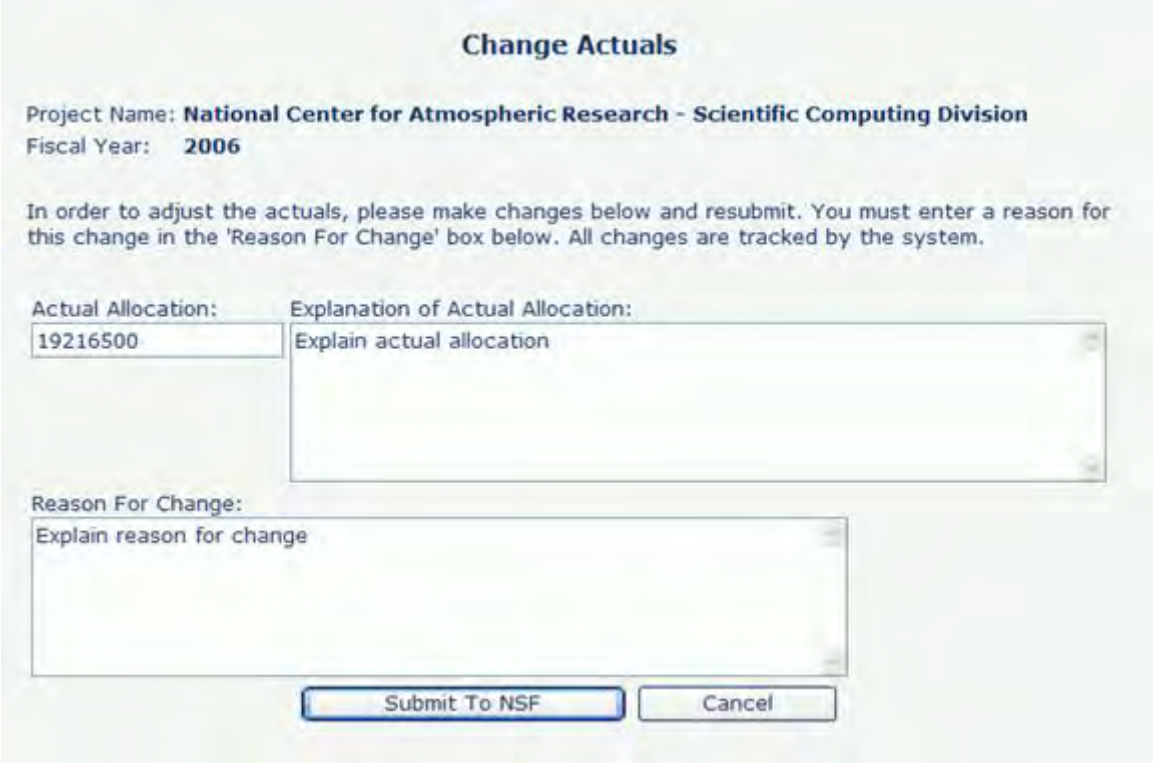


Figure 3 Change Actuals screen.

3. When you select the **Submit to NSF** button, the **Confirm Submission** screen (Figure 4), will be displayed. Again, you may continue by selecting the **Confirm** button.

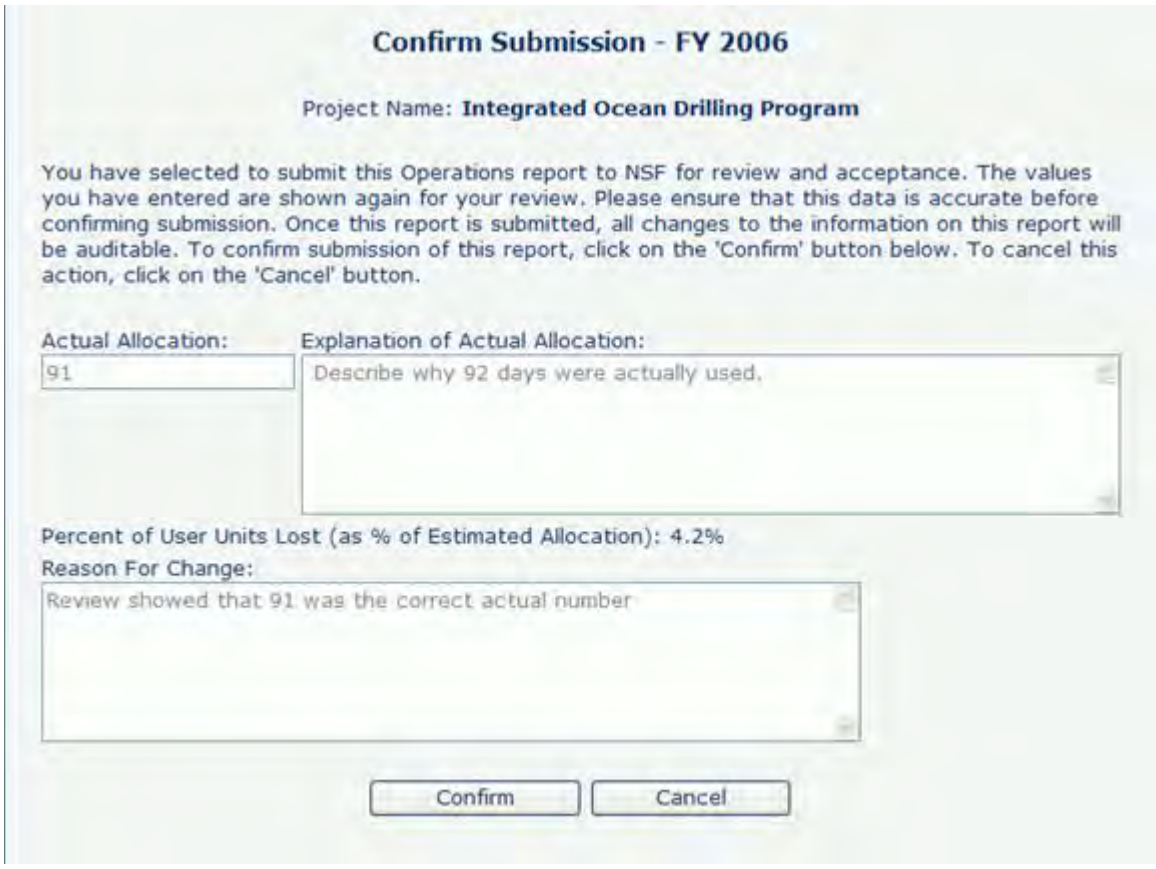


Figure 4 Change Actuals Confirm Submission screen.

4. Select the **Confirm** button, to confirm your submission. The **Submit Success** screen (Figure 5) displays indicating that your modifications have been resubmitted to NSF successfully.

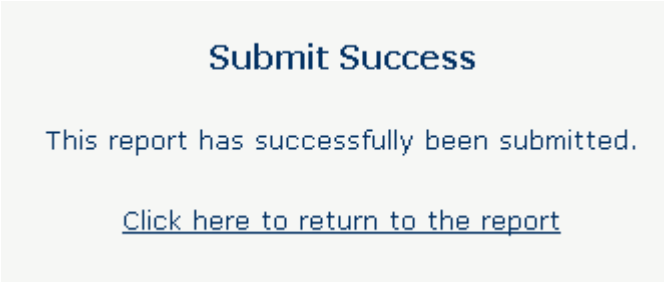
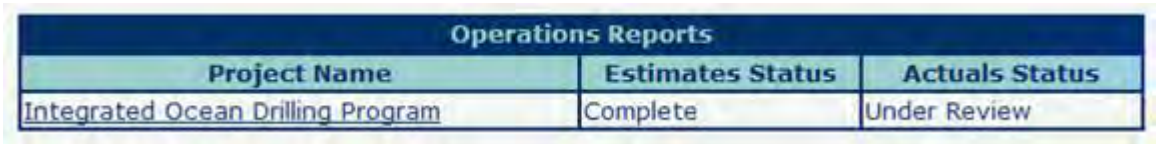


Figure 5 Submit Success.

In this scenario, you have already submitted the Actuals Operations Report and NSF has already begun the review process (Figure 6).



Operations Reports		
Project Name	Estimates Status	Actuals Status
Integrated Ocean Drilling Program	Complete	Under Review

Figure 6 Facility List screen with Actuals Under Review status.

As a result, any resubmission by you will require NSF approval. In this scenario, FPRS will recognize that you have resubmitted a report, and present NSF with the option to accept the new report or to revert to the previously submitted report (which is currently under review). This is different from Resubmitting a Submitted Operations Report where the modifications were made available instantly because NSF had not begun the report review.

1. The report is currently read-only as the status is Under Review. To resubmit actuals performance data, select the **To change the actuals for fiscal year *nnnn*, click here** link at the bottom of the screen (see Figure 2). Note that there is also a link to change the estimates report as well. Again, this is a component of the flexible design to accommodate NSF Guideline 1. The Actuals Operations Report with an Under Review status (Figure 7) displays.

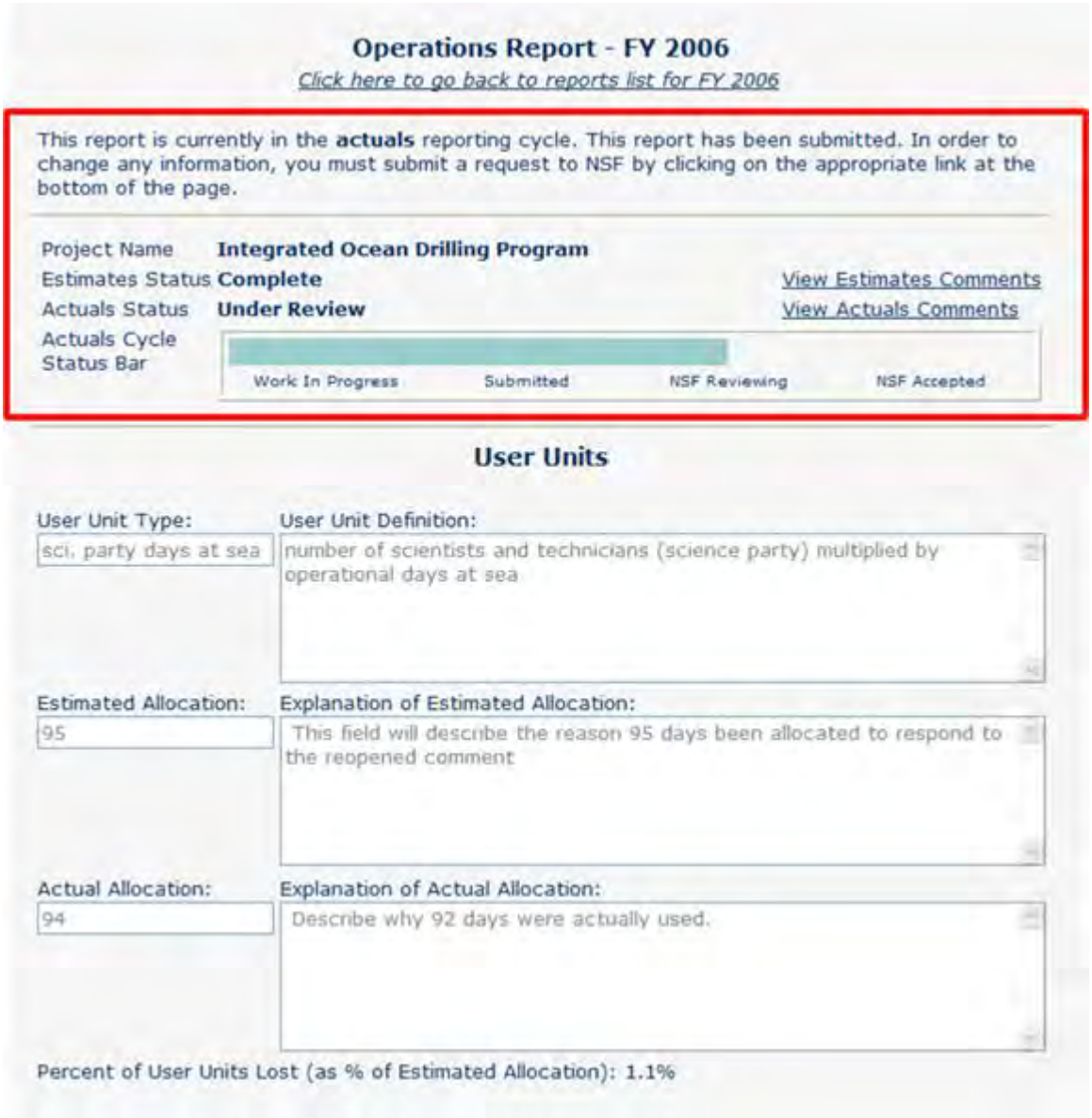


Figure 7 Actuals Operations Report, Under Review, as shown in material inside red box.

When you select the link, the **Request to Change Actuals** screen is displayed (Figure 8). The existing actuals data is shown and the data fields are open for modification by the PI. You should make the necessary revisions, and resubmit by selecting the **Submit to NSF** button. You will be required to enter a *Reason For Change* in the appropriate text box. This gives you an opportunity to state to NSF why changes are necessary.

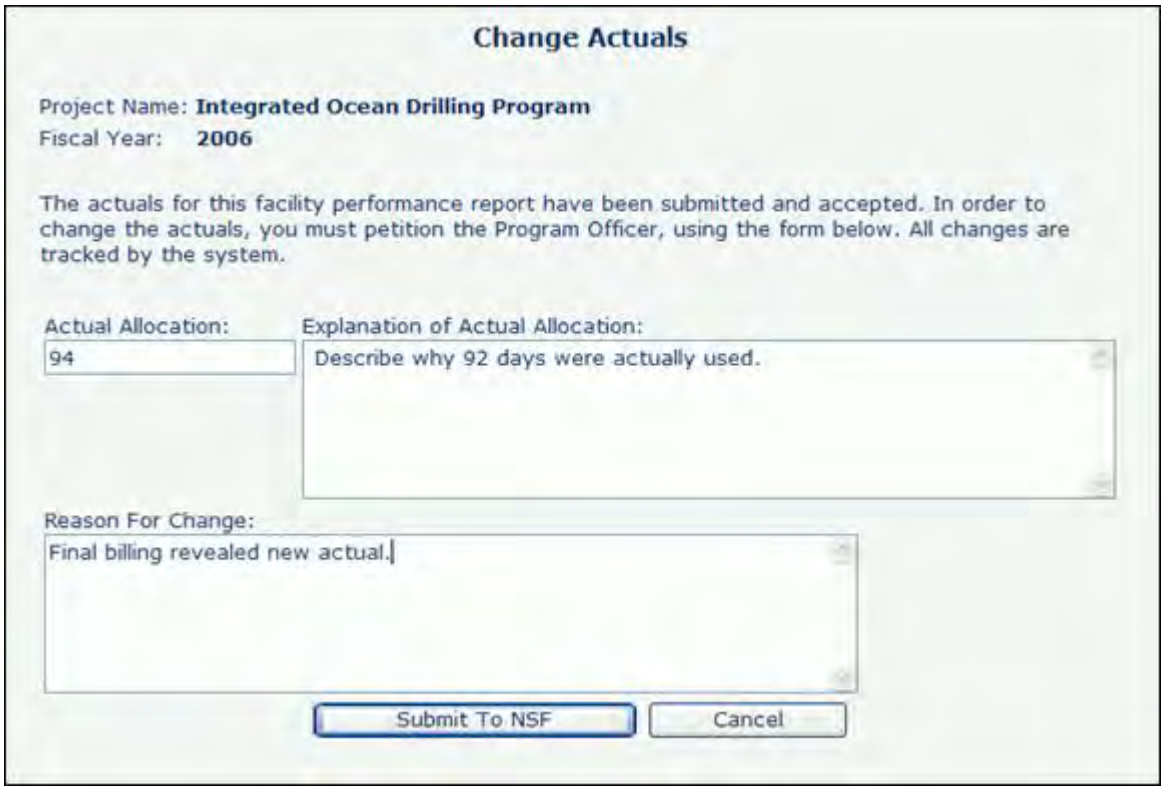


Figure 8 Actuals Operations Report, Change Actuals screen.

2. You should make the necessary revisions, and resubmit by selecting the **Submit to NSF** button. You will be required to enter a *Reason For Change* in the appropriate text box. This gives you an opportunity to state to NSF why changes are necessary. You also can **Cancel** this request, leaving the submitted report unchanged.

   After you select the **Submit to NSF** button, the **Confirm Submission** screen (Figure 9) will be displayed.

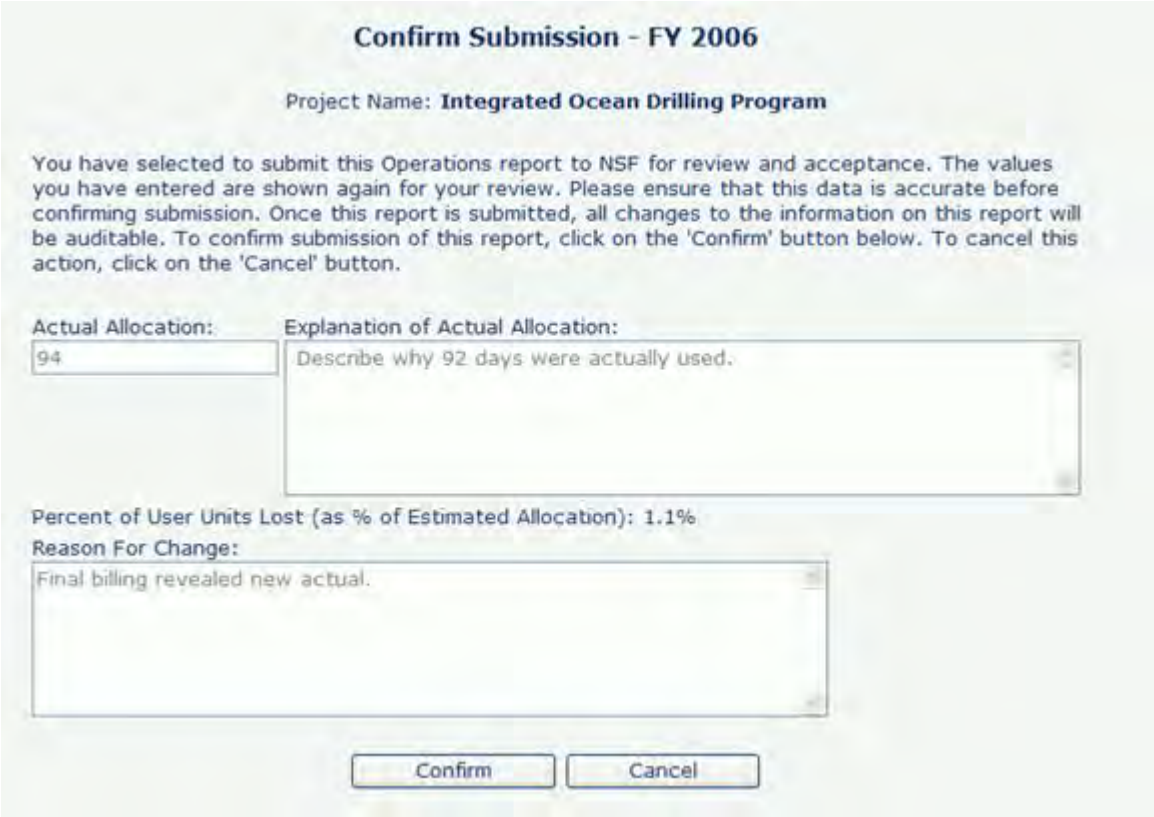


Figure 9 Change Actuals Confirm Submission screen.

3. Select the **Confirm** button to submit the request to change the actuals data. The **Submit Success** screen (Figure 10) will be displayed, indicating that your modifications have been successfully resubmitted to NSF.

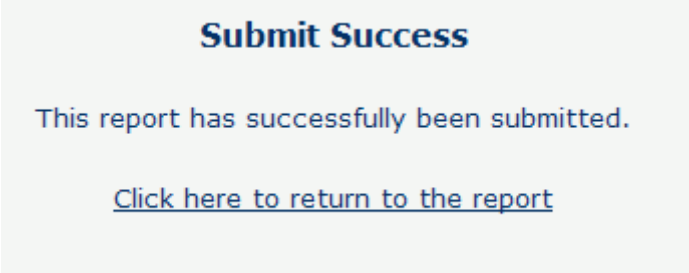


Figure 10 Submit Success screen.

4. From the **Submit Success** screen, select the **Click here to return to the report** link to view the report. The **Operations Report Detail** screen will be displayed, Figure 11.

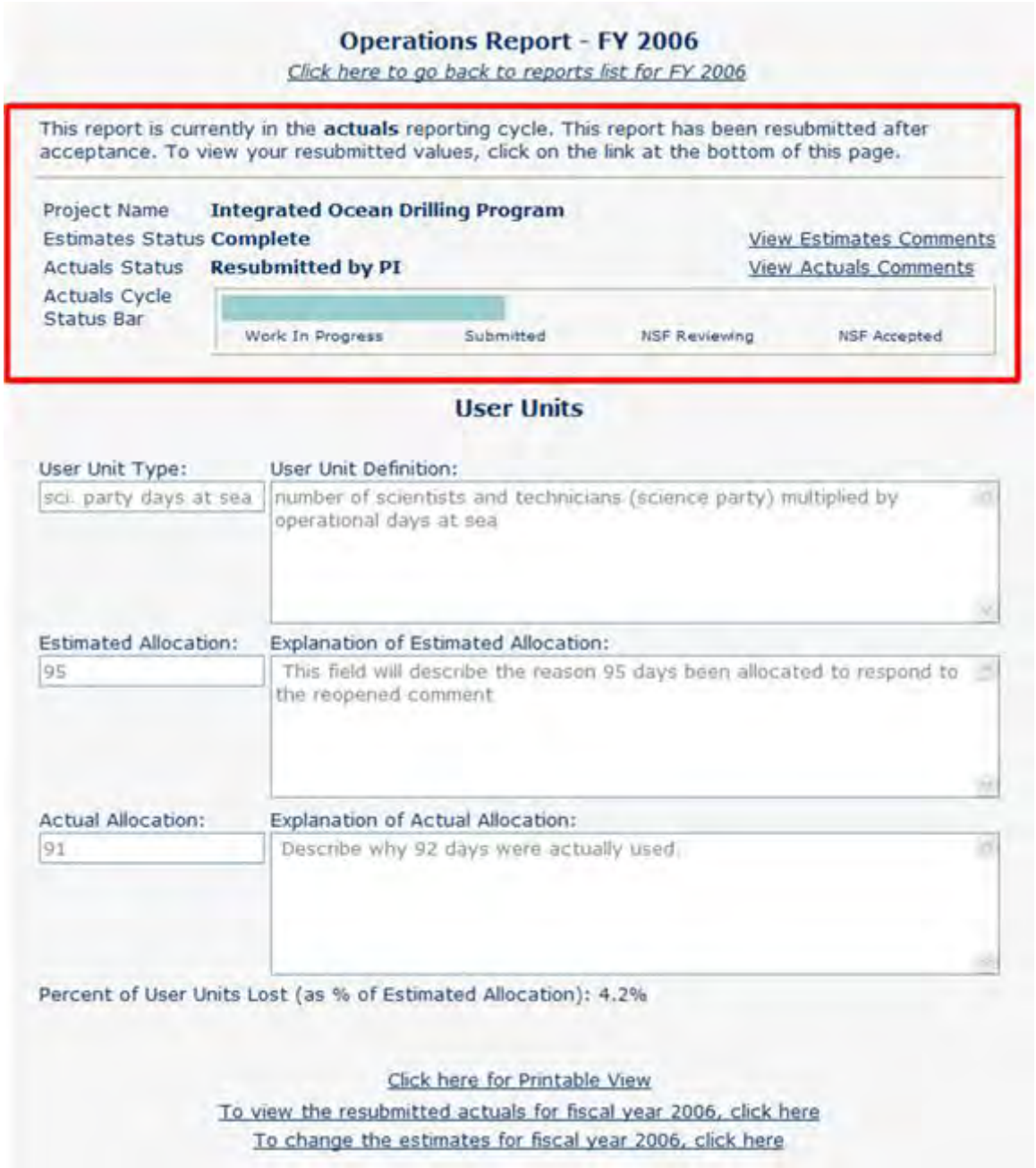


Figure 11 Actuals Operations Report, Resubmitted by PI, as indicated by material inside red box.

5. The new actuals report status is Resubmitted by PI, and the newly submitted values are not shown in this report—only the prior values are there because the new report is awaiting NSF review and acceptance. Notice that the **To change the actuals for fiscal year nnnn, click here** link is removed and is replaced with the link **To view the resubmitted actuals for fiscal year *nnnn*, click here**. Select this link, Figure 12, to view your report submission. Notice that you still have an option to **Cancel** the resubmission, if desired.

The new actuals report status is **Resubmitted by PI**, and the newly submitted values are not shown in this report only the prior values are there because the new report is

awaiting NSF review and acceptance. Notice that the **To change the actuals for fiscal year *nnnn*, click here** link is removed and is replaced with the link **To view the resubmitted actuals for fiscal year *nnnn*, click here**. Select this link on Figure 11 to view your report submission. The **Change Actuals** screen (Figure 12) displays. Notice that you still have an option to **Cancel** the resubmission, if desired.

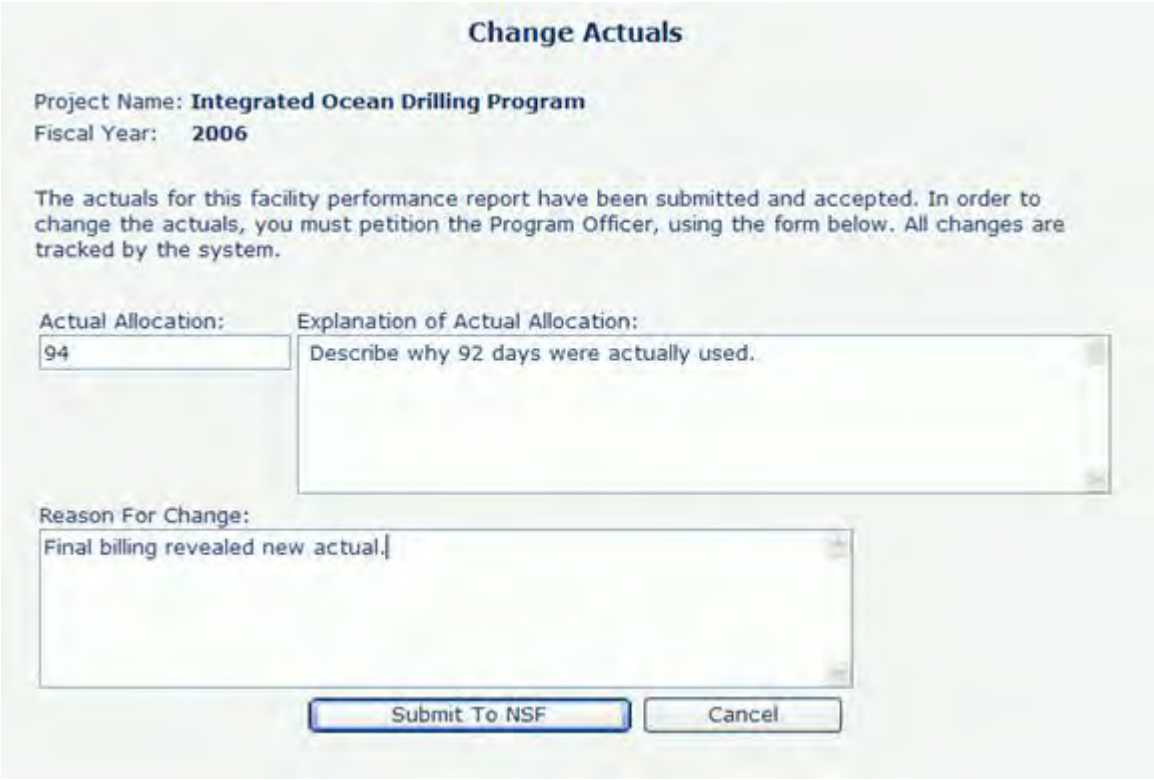


Figure 12 Actuals Operations Report, view Change Actuals screen.

The report resubmission is now awaiting NSF review. NSF will be notified of the resubmission and may either accept the new report or revert to the previous report.

See also:

- View an Estimates Operations Report
- Submit an Estimates Operations Report
- Actuals Operations Report
- Performance Data in an Actuals Operations Report
- Submit an Actuals Operations Report

Construction / Upgrade

Construction/Upgrade Report

The second type of report for the FPRS reporting process is the Construction/Upgrade Report. Like the Operations Report, there are two separate submission periods, one for estimates and one for actuals. The primary data elements for Construction/Upgrade Reports are total dollars spent to date and earned value to date. Although this data is captured annually, you must remember that the data you are reporting is cumulative for the entire project as of the current fiscal year.

The Construction/Upgrade Report compares the *Planned Value* at the beginning of the fiscal year during the estimates reporting cycle with the *Earned Value* and *Actual Cost* at the end of the fiscal year during the actuals reporting cycle. In addition, the Construction/Upgrade Report will have an overall Project Baseline Description defined for the project.

This section details the actions that you perform on a Construction/Upgrade Report and the steps that you must take to view, save, submit, and resubmit estimates and actuals performance data for a Construction/Upgrade Report.

Components of a Construction Report

As of FY 2003, NSF's GPRA goal for construction projects utilizes Earned Value Management (EVM) as a measure of cost and schedule progress (Figure 1). For a more detailed explanation of how to report EVM, please refer to Earned Value Management for a Construction Report.

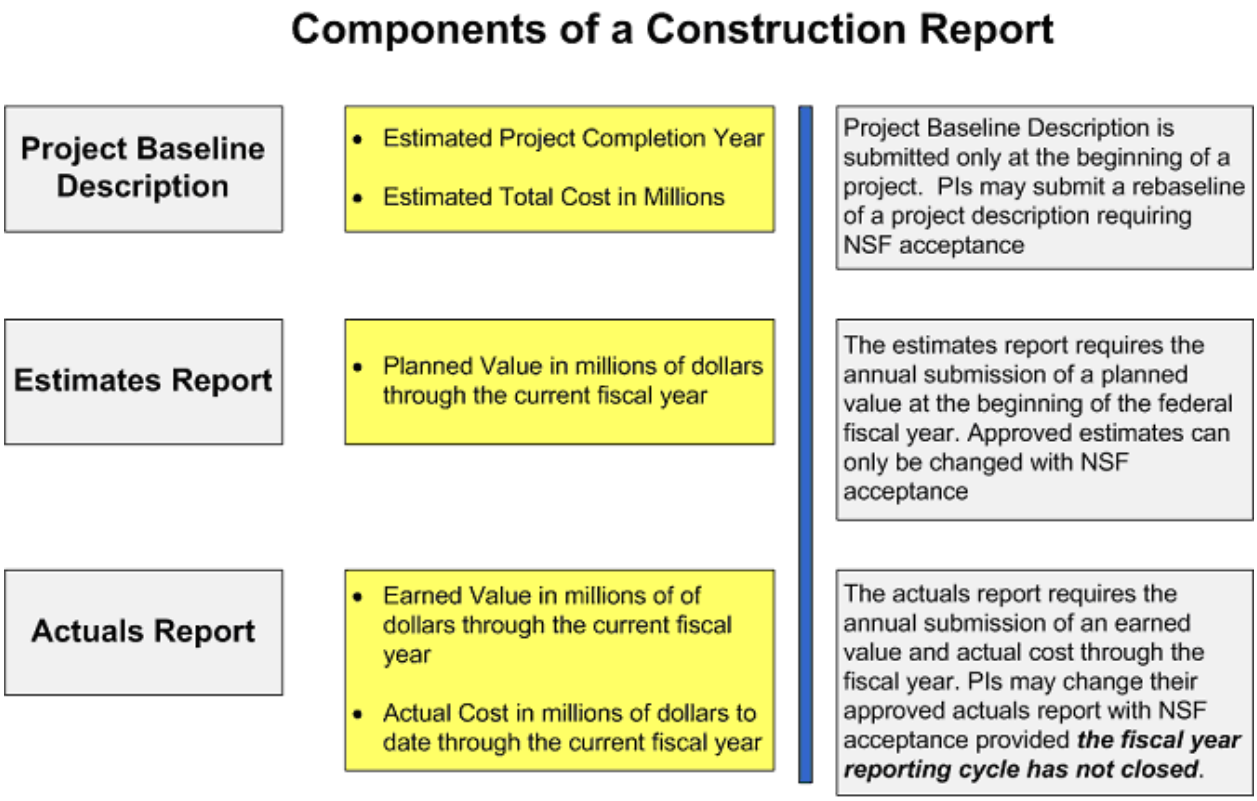


Figure 1 Components of a Construction Report.

Since most large facilities construction/upgrade projects span multiple years, FPRS requires the reporting of estimate and actual data based on cumulative progress as years are added.

For this reason, each value must be greater than or equal to the prior year's value. For example, if the actual cost of a project is $2M at the end of the first fiscal year, $2M should be entered into the *Actual Cost* data field. If in the second year only $1M was actually expended, then the amount to be entered into the *Actual Cost* for the second year should be $3M, not $1M. Estimates and actuals reporting requires the cumulative calculation of reporting the total amount for all prior fiscal years plus the amount of the current fiscal year.

See also:
- View Construction/Upgrade Report
- Construction/Upgrade Report Data
- Construction/Upgrade Report Baseline
- Submit a Construction/Upgrade Report Baseline for the First Year
- Construction/Upgrade Report Estimates Report
- Submit the Construction/Upgrade Report Estimate
- Submit a Construction Upgrade Estimates Report for the Second and Subsequent Year
- Construction/Upgrade Report Actuals Report
- Resubmit a Construction/Upgrade Report
- Resubmit a "Submitted" Construction/Upgrade Report
- Resubmit an "Under Review" or "Complete" Construction/ Upgrade Report

See also:
- Introduction to the NSF Facility Performance Reporting System
- Operations Reports
- Earned Value Management for a Construction Report

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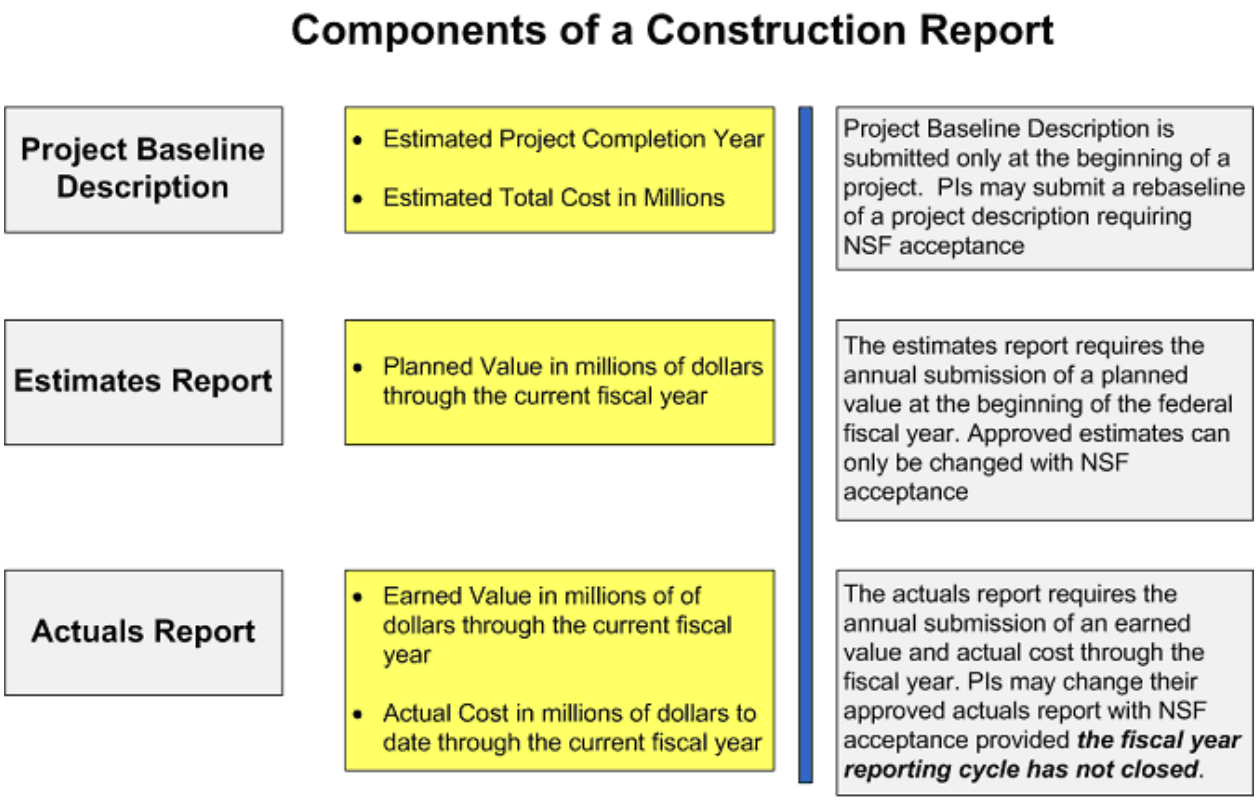

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See also:

- View Construction/Upgrade Report
- Construction/Upgrade Report Data
- Construction/Upgrade Report Baseline
- Submit a Construction/Upgrade Report Baseline for the First Year
- Construction/Upgrade Report Estimates Report
- Submit the Construction/Upgrade Report Estimate
- Submit a Construction Upgrade Estimates Report for the Second and Subsequent Year
- Construction/Upgrade Report Actuals Report
- Resubmit a Construction/Upgrade Report
- Resubmit a "Submitted" Construction/Upgrade Report
- Resubmit an "Under Review" or "Complete" Construction/ Upgrade Report

See also:

- Introduction to the NSF Facility Performance Reporting System
- Operations Reports

- Earned Value Management for a Construction Report

Construction/Upgrade Report Data

The primary data elements for Construction/Upgrade Reports are total dollars spent to date and earned value to date.

Construction/Upgrade Report Baseline Data

The Construction/Upgrade Report requires two data fields that must be entered by you to define the Project Baseline Description:

- **Estimated Project Completion Year**. Represents the estimated federal fiscal year in which the project is scheduled to be completed; and
- **Estimated Total Cost**. Represents the estimated total project cost in million of dollars.

Construction/Upgrade Report Estimates Data

The Construction/Upgrade Report contains one data field that must be entered by you during the estimates reporting cycle:

- **Planned Value.** Planned Value is also known as the Budgeted Cost of Work Scheduled (BCWS) and represents the estimated value (in million of dollars) of the work to be accomplished as scheduled by the project through the federal fiscal year. This integer data field is required. FPRS will accept decimals but will round to the nearest dollar.

Construction/Upgrade Report Actuals Data

The Construction/Upgrade Report contains two data fields that must be entered by you, both of which are required:

- **Earned Value**. Earned Value is also known as the Budgeted Cost of Work Performed (BCWP) and represents the planned costs (in millions of dollars) of the work allocated to the activities completed (or portions of activities) through the federal fiscal year. It measures progress against the plan. This integer data field is required. FPRS will accept decimals but will round to the nearest dollar.
- **Actual Cost**. The Actual Cost of the progress made, also known as the Actual Cost of Work Performed (ACWP), represents the costs (in millions of dollars) actually incurred in accomplishing the work performed through the federal fiscal year. The actual costs of the work are charged against the activities completed (or portions of activities). This integer data field is required. FPRS will accept decimals but will round to the nearest dollar.

See also:

- Construction/Upgrade Report
- View Construction/Upgrade Report
- Construction/Upgrade Report Baseline
- Submit a Construction/Upgrade Report Baseline for the First Year
- Construction/Upgrade Report Estimates Report
- Submit the Construction/Upgrade Report Estimate
- Submit a Construction Upgrade Estimates Report for the Second and Subsequent Year
- Construction/Upgrade Report Actuals Report
- Resubmit a Construction/Upgrade Report

- Resubmit a "Submitted" Construction/Upgrade Report
- Resubmit an “Under Review” or “Complete” Construction/Upgrade Report

View Construction/Upgrade Report

Upon FPRS log-in (see Navigating the FPRS) you will be presented with a list of your specific Construction/Upgrade Reports for a given fiscal year as in Figure 1. FPRS will automatically default to the current fiscal year. You may change the fiscal year by selecting the *Select Fiscal Year* drop-down list. This action will display the available project reports for that fiscal year.

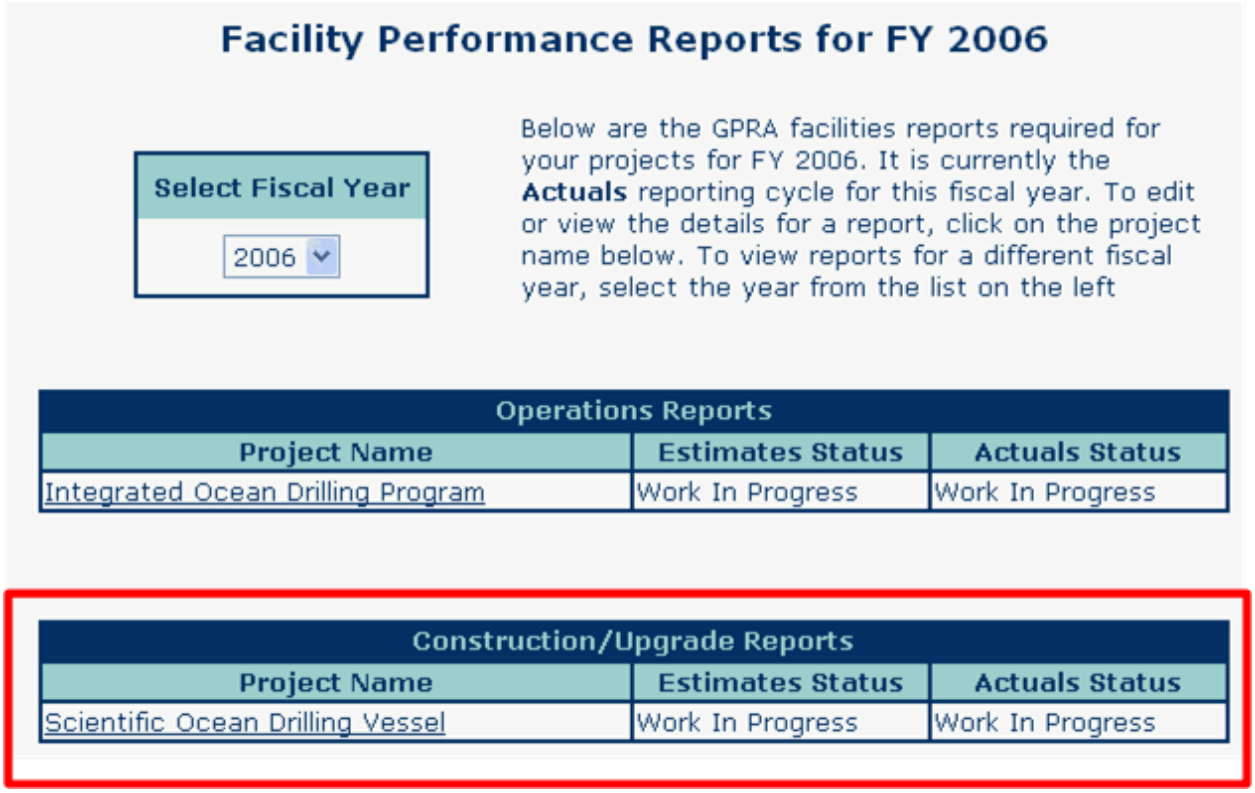


Figure 1 Facility List screen. The Construction / Upgrade Reports item is encircled in red.

If you are required to report on operations and construction/upgrade activities, both reports will be accessible from the Facility List screen. Each report will list the project name and the current workflow state of the estimates and actuals reporting cycles in the columns titled, *Estimates Status* and *Actual Status*. For a detailed description of each status, please refer to Workflow.

To view the details of a Construction/Upgrade Report, select the Project Name. This action will display the **Report Detail** screen.

See also:
- Construction/Upgrade Report
- Construction/Upgrade Report Data
- Construction/Upgrade Report Baseline

- Submit a Construction/Upgrade Baseline for the First Year
- Construction/Upgrade Estimates Report
- Submit the Construction/Upgrade Estimate
- Submit a Construction Upgrade Estimates Report for the Second and Subsequent Year
- Construction/Upgrade Actuals Report
- Resubmit a Construction/Upgrade Report
- Resubmit a "Submitted" Construction/Upgrade Report
- Resubmit an “Under Review” or “Complete” Construction/ Upgrade Report

Construction/Upgrade Report Baseline

This section describes submitting a Construction/Upgrade Report for the estimates reporting cycle in the first year, requiring a Project Baseline Description. The next section describes completing a Construction/Upgrade Report for the estimates reporting cycle in subsequent years.

To submit a Construction/Upgrade Report baseline, navigate to the **Construction/Upgrade Report Detail** screen by selecting the *Project Name* located on the **Facility List** screen as described in View Construction/Upgrade Report.

See also:
- Construction/Upgrade Report
- View Construction/Upgrade Report
- Construction/Upgrade Report Data
- Submit a Construction/Upgrade Baseline for the First Year
- Construction/Upgrade Estimates Report
- Submit the Construction/Upgrade Estimate
- Submit a Construction Upgrade Estimates Report for the Second and Subsequent Year
- Construction/Upgrade Actuals Report
- Resubmit a Construction/Upgrade Report
- Resubmit a "Submitted" Construction/Upgrade Report
- Resubmit an “Under Review” or “Complete” Construction/ Upgrade Report

Submit a Construction/Upgrade Baseline for the First Year

Each Construction/Upgrade Report will have a Project Baseline Description defined for the project. This baseline data is submitted at the beginning of a project. The project baseline contains two data fields—Estimated Total Cost of Project and the Estimated Project Completion Year—and is submitted to NSF during the estimates reporting cycle of the first fiscal year the project is required to report. You will submit your project baseline description, which will be electronically routed according the same workflow as the estimates and actual reports (i.e., submission by PI, approval by NSF). Once approved, this baseline represents a high-level description of the project.

If, during the lifespan of the project, it is determined that the project baseline needs to be modified, you can request to submit a rebaseline of the project. If accepted by NSF, the project baseline data will be updated to reflect changes in the project. For example, the project duration increases from 5 to 7 years.

Once the estimates reporting cycle is opened for a fiscal year, you are required to access FPRS to submit your estimates for your projects in the current fiscal year. In the first year

of Construction/Upgrade Reports in the estimates reporting cycle, you will be required to submit both the Project Baseline Description and the Planned Value.

Figure 1 depicts a Construction/Upgrade Report that requires the Project Baseline Description and Estimates Report.

Construction Report - FY 2006

Click here to go back to reports list for FY 2006

This report is currently in the **estimates** reporting cycle. First you must complete the project baseline description and submit the project baseline description to NSF for review. Then define the planned value (in milions of dollars) for the estimates through this fiscal year. When complete, you must then submit the estimates report to NSF using the submission button at the bottom of this page. The planned value is cumulative and therefore includes data for all years through this fiscal year. Both the project baseline description and the estimates report must be submitted.

Project Name **Scientific Ocean Drilling Vessel**

Estimates Status **Work In Progress** View Estimates Comments

Estimates Cycle Status Bar

Work In Progress | Submitted | NSF Reviewing | NSF Accepted

Current Project Baseline Description History Update Project Baseline

Current Profile Acceptance Date	**Work In Progress**
Estimated Project Completion Year	**2007**
Estimated Total Cost (in Millions)	**115.0**

Project Baseline Submission

To submit the Estimated Project Completion Year and Estimated Total Cost, please click on the button below. Once you have submitted this report, any changes will be tracked by the system.

Submit To NSF

Annual Reports

Fiscal Year	Planned Value (PV) (in currently approved project plan) ($ in Mil.) (Project thru FY)	Actual Cost (AC) ($ in Mil.) (Project thru FY)	Earned Value (EV) ($ in Mil.) (Project thru FY)	Cost Variance as a percent of Project Plan	Schedule Variance as a percent of Project Plan	
2006	0.0					View Explanation

Planned Value Explanation:

Save Estimates | Open Estimates Worksheet

Estimates Submission

To submit the Planned Value through FY 2006, please enter the planned value using the estimates worksheet, and click on the submit button below. Once you have submitted this report, any changes will be tracked by the system.

Submit To NSF

Click here for Printable View

Figure 1 Construction / Upgrade Report: Annual Estimates Report and Project Baseline Description. The *Submit to NSF* button for the project baseline submission is circled in red.

1. You must first navigate to the **Construction / Upgrade Report Detail** screen (Figure 1) (see Navigating the FPRS). Then, enter the project completion date in the *Estimated Project Completion Year* data field. This date should represent the federal fiscal year in which the project is expected to be completed. The field should be entered in a four-digit format (i.e., "2006"). Next, enter a dollar amount in the *Estimated Total Cost* data field.
2. Once you are satisfied with this data entry, select the **Submit to NSF** button. Be careful to not confuse this button with the same name in the *Estimates Report* section (see Figure 1). When you select the **Submit to NSF** button, the **Confirm Submission** screen will be displayed as in Figure 2.

Figure 2 Confirm Submission of Project Baseline Description.

3. Select either the **Submit** button to confirm your submission. The **Submit Success** screen (Figure 3) will be displayed, indicating that your baseline has been submitted successfully.

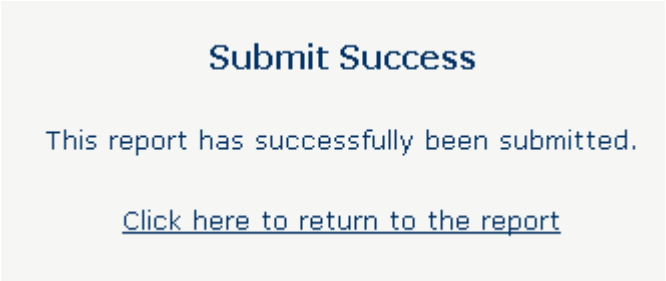


Figure 3 Submit Success screen.

4. Upon submission, NSF will be notified to begin reviewing the Project Baseline Description. Select the **Click here to return to the report** link to return to the **Construction / Upgrade Report Detail** screen. Your submission will be read-only while NSF is reviewing the report.

Resubmitting a Reopened Baseline

A notification via email will be sent to you once NSF has accepted the Project Baseline Description. If the Project Baseline Description is returned to you, a notification via email will be sent to you. You will be required to log into FPRS to view the status of the submission on the **Construction / Upgrade Report Detail** screen. Please refer to View Construction/Upgrade Report.
You must first navigate to the **Construction / Upgrade Report Detail** screen (Figure 4) (see Navigating the FPRS). In Figure 4, NSF returned the Project Baseline Description to you for further action. Notice that the status is “Reopened” and that the data fields are open for editing and resubmitting to NSF.

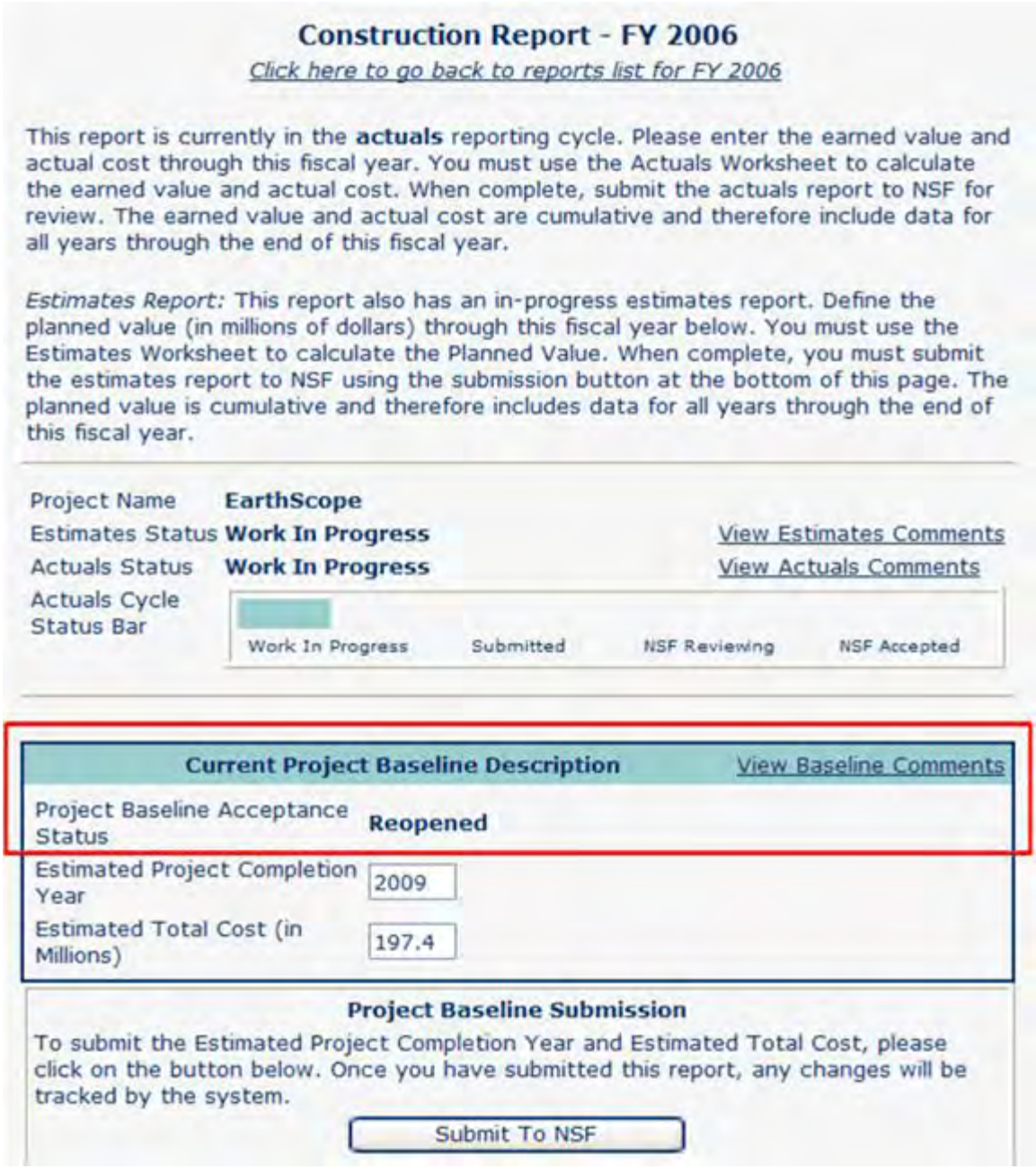


Figure 4 Construction / Upgrade Report: Current Project Baseline Description. The Baseline has been rejected by NSF. Note that the baseline status is Reopened (in the red box).

1. To view the comments about why the report has been returned to you, select the **View Baseline Comments** link (in the red box on Figure 4). This action will display a new window, Figure 5, containing comments that have been entered by NSF.

Figure 5 C/U Estimates Report—Baseline Comments

2. Upon review of NSF comments, you may or may not modify the data. If you are confident that the Project Baseline Description is accurate, select the **Submit to NSF** button (Figure 4) without edits.
3. If you determine that changes are necessary, the Project Baseline Description should be resubmitted. You should enter the modified data and select the **Submit to NSF** button. Upon NSF acceptance, the **Construction/Upgrade Report Detail** screen will resemble Figure 6. Notice that the *Current Profile Acceptance Date* is populated with the date that NSF accepted the report.

Construction Report - FY 2006

Click here to go back to reports list for FY 2006

This report is currently in the **estimates** reporting cycle. Define the planned value (in millions of dollars) through this fiscal year below. You must use the Estimates Worksheet to calculate the Planned Value. When complete, you must submit the estimates report to NSF using the submission button at the bottom of this page. The planned value is cumulative and therefore includes data for all years through the end of this fiscal year.

Project Name **Scientific Ocean Drilling Vessel**

Estimates Status **Work In Progress** View Estimates Comments

Estimates Cycle Status Bar

Work In Progress | Submitted | NSF Reviewing | NSF Accepted

Current Project Baseline Description		History Update Project Baseline
Current Profile Acceptance Date	**Jun 24, 2005**	
Estimated Project Completion Year	**2007**	
Estimated Total Cost (in Millions)	**115.0**	

Annual Reports

Fiscal Year	Planned Value (PV) (in currently approved project plan) ($ in Mil.) (Project thru FY)	Actual Cost (AC) ($ in Mil.) (Project thru FY)	Earned Value (EV) ($ in Mil.) (Project thru FY)	Cost Variance as a percent of Project Plan	Schedule Variance as a percent of Project Plan	
2005	2.49	0.85	0.84	-1.2%	-66.3%	View Explanation
2006	3.64					

Planned Value Explanation:

The Science System integration is expected to be 65% completed in FY2006.

Save Estimates | Open Estimates Worksheet

Estimates Submission

To submit the Planned Value through FY 2006, please enter the planned value using the estimates worksheet, and click on the submit button below. Once you have submitted this report, any changes will be tracked by the system.

Submit To NSF

Click here for Printable View

Figure 6 Construction/Upgrade Report: Annual Estimates Report. Project Baseline Description in red box; Baseline Description Complete.

Rebaseline Project Baseline Description

This section identifies the process you perform to change and resubmit a Project Baseline Description that has already been submitted, but has not yet entered the "Under Review" state. This example follows the resubmission of an Estimates Construction/Upgrade Report. This process would execute exactly the same as for an Actuals Construction/Upgrade Report.

Similar to the Construction/Upgrade Report for the estimates and actuals reporting cycle, you may also request to rebaseline the Project Baseline Description, if necessary. The distinction is that the estimates and actuals data are submitted through the current fiscal year, while the Project Baseline Description represents the entire project through the final fiscal year of the project. The process for changing the Project Baseline Description is referred to as *rebaselining*. You may choose to rebaseline during the estimates and actuals reporting cycles.

You must first navigate to the **Construction/Upgrade Report Detail** screen (Figure 7) (see Navigating the FPRS).In Figure 7, the report is currently in the estimates reporting cycle for FY 2006, the second reporting year for this project. Please note that this estimates report has been submitted.

Construction Report - FY 2006

Click here to go back to reports list for FY 2006

This report is currently in the **estimates** reporting cycle. This report has been submitted. In order to change any information, you must submit a request to NSF by clicking on the appropriate link at the bottom of the page.

Project Name **Scientific Ocean Drilling Vessel**

Estimates Status **Submitted** View Estimates Comments

Estimates Cycle Status Bar

Work In Progress | Submitted | NSF Reviewing | NSF Accepted

Current Project Baseline Description	History	Update Project Baseline
Current Profile Acceptance Date	**Jun 24, 2005**	
Estimated Project Completion Year	**2007**	
Estimated Total Cost (in Millions)	**115.0**	

Annual Reports

Fiscal Year	Planned Value (PV) (in currently approved project plan) ($ in Mil.) (Project thru FY)	Actual Cost (AC) ($ in Mil.) (Project thru FY)	Earned Value (EV) ($ in Mil.) (Project thru FY)	Cost Variance as a percent of Project Plan	Schedule Variance as a percent of Project Plan	
2005	2.49	0.85	0.84	-1.2%	-66.3%	View Explanation
2006	3.64					

View Estimates Worksheet

Planned Value Explanation:

The Science System integration is expected to be 65% completed in FY2006.

Click here for Printable View

To change the estimates for fiscal year 2006, click here

Figure 7 Estimates C/U Report, 2nd Year Submitted. The *Update Project Baseline* link is circled in red.

1. To rebaseline, select the **Update Project Baseline** link on the *Current Project Baseline Description* header (Figure 7). When you select the link, the **Change Project Baseline** screen is displayed (Figure 8). The existing baseline data is shown and the data fields are open for your modification.

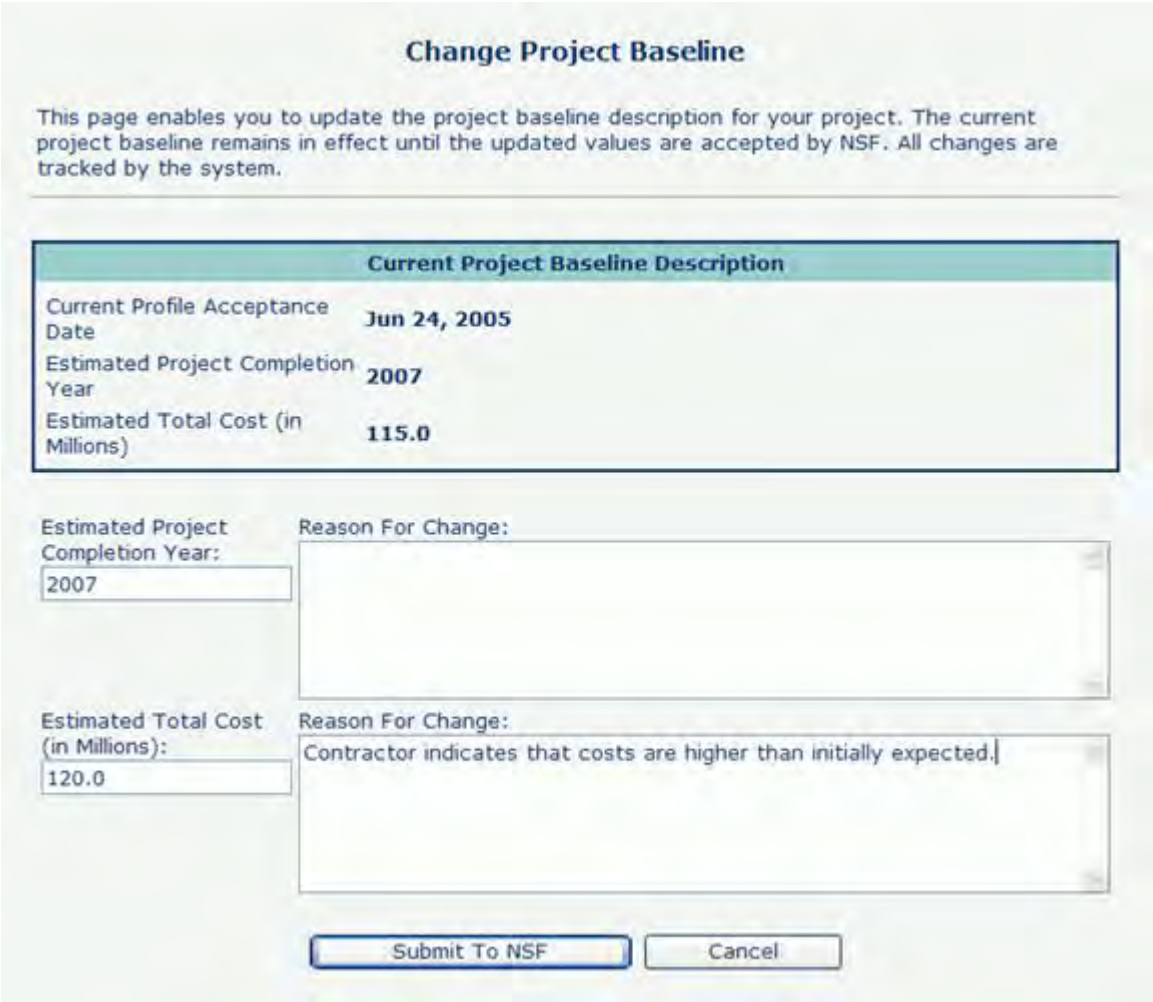


Figure 8 C/U Report, Change Project Baseline screen.

2. You should make the necessary revisions, and resubmit by selecting the **Submit to NSF** button (Figure 8). You will be required to enter a *Reason For Change* in the appropriate text box.
3. From the **Change Project Baseline** screen, you can select **Submit to NSF** to submit the rebaseline request. Selecting the **Submit to NSF** will bring you to the **Confirm Submission** screen (Figure 9).

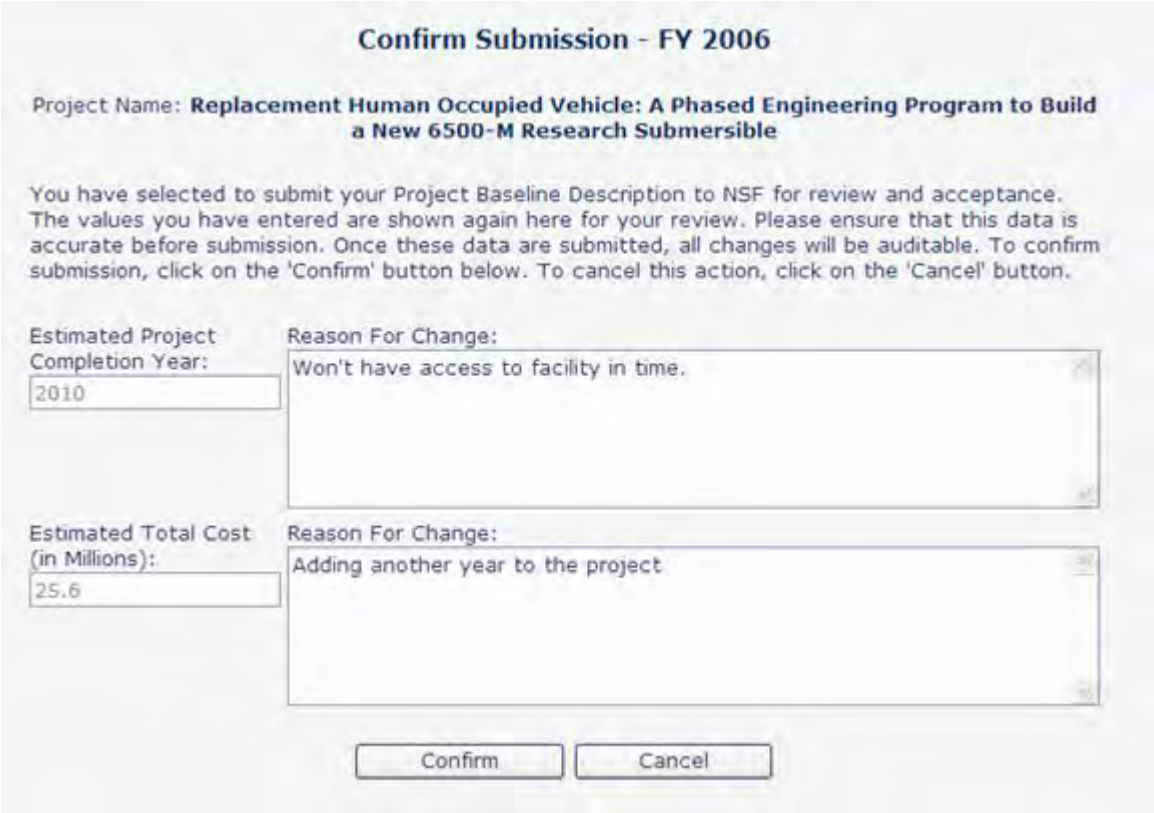


Figure 9 C/U Report, Confirm Submission of Project Rebaseline.

4. Again, you may continue by selecting the **Confirm** button. By choosing to **Confirm**, you will submit the rebaseline request NSF and the **Submit Success** screen will appear (Figure 10). Upon submission, NSF has received an email notification to review the request. You will receive a notification once NSF has accepted the request.

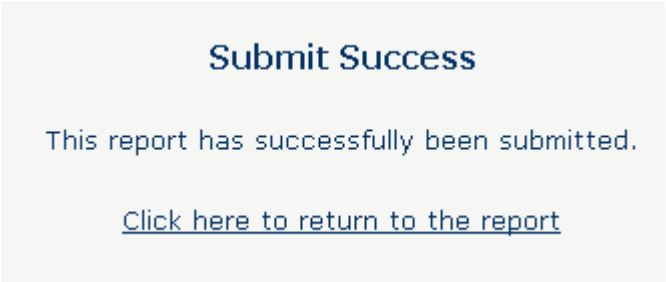


Figure 10 C/U Report, Submit Success.

5. Select the **Click here to return to the report** link. The Construction/Upgrade Report Detail screen displays (Figure 11). You will see the project baseline has changed to a status of *Resubmitted by PI*. However, the project baseline values that are shown are the previously accepted values.

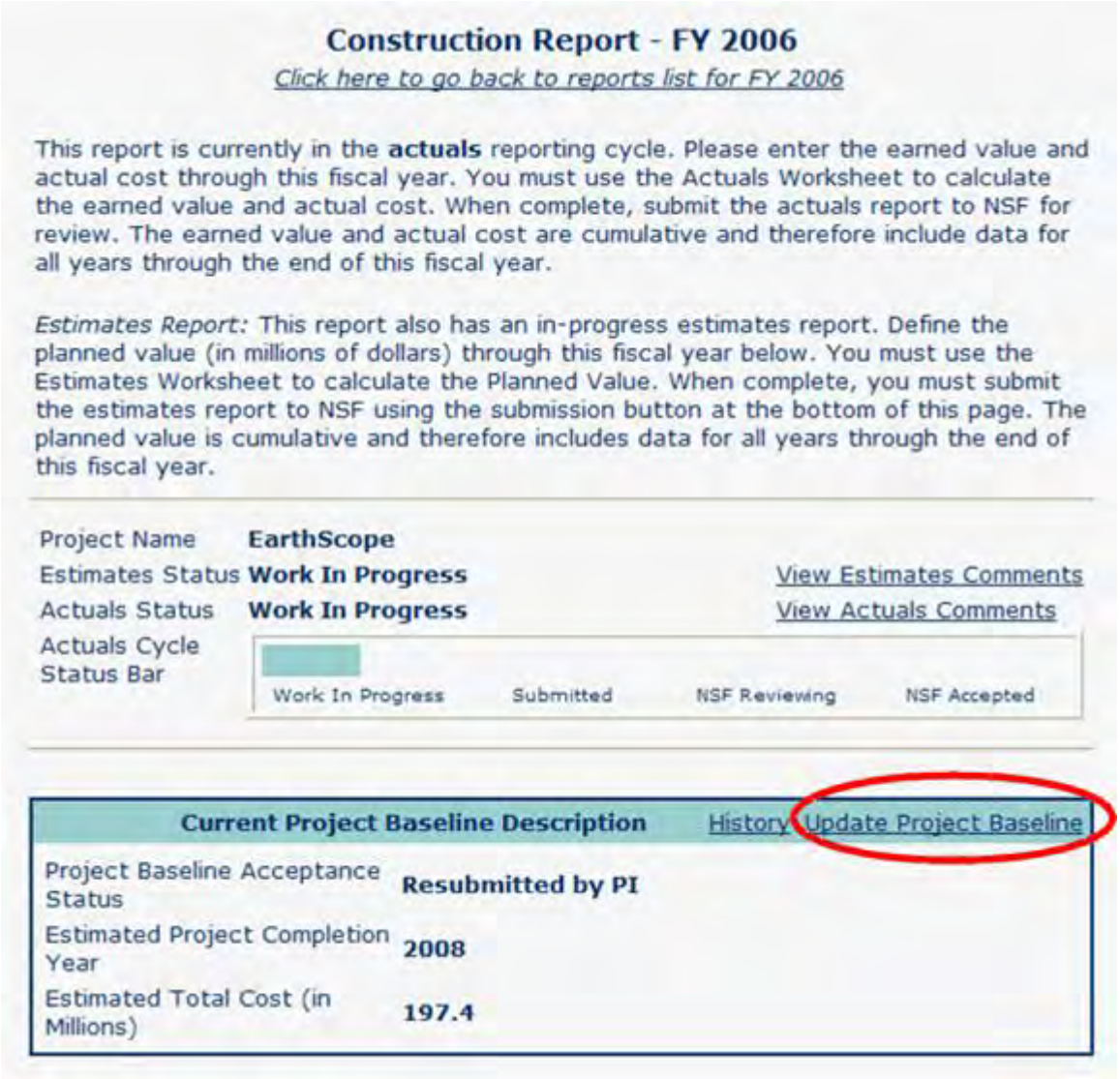


Figure 11 C/U Report, Resubmitted Baseline Values. The *Update Project Baseline* link is circled in red.

6. To view your newly submitted values, select the **Update Project Baseline** link (Figure 11). This will bring you to the **Change Project Baseline** screen (Figure 12). Here your rebaseline values are shown.

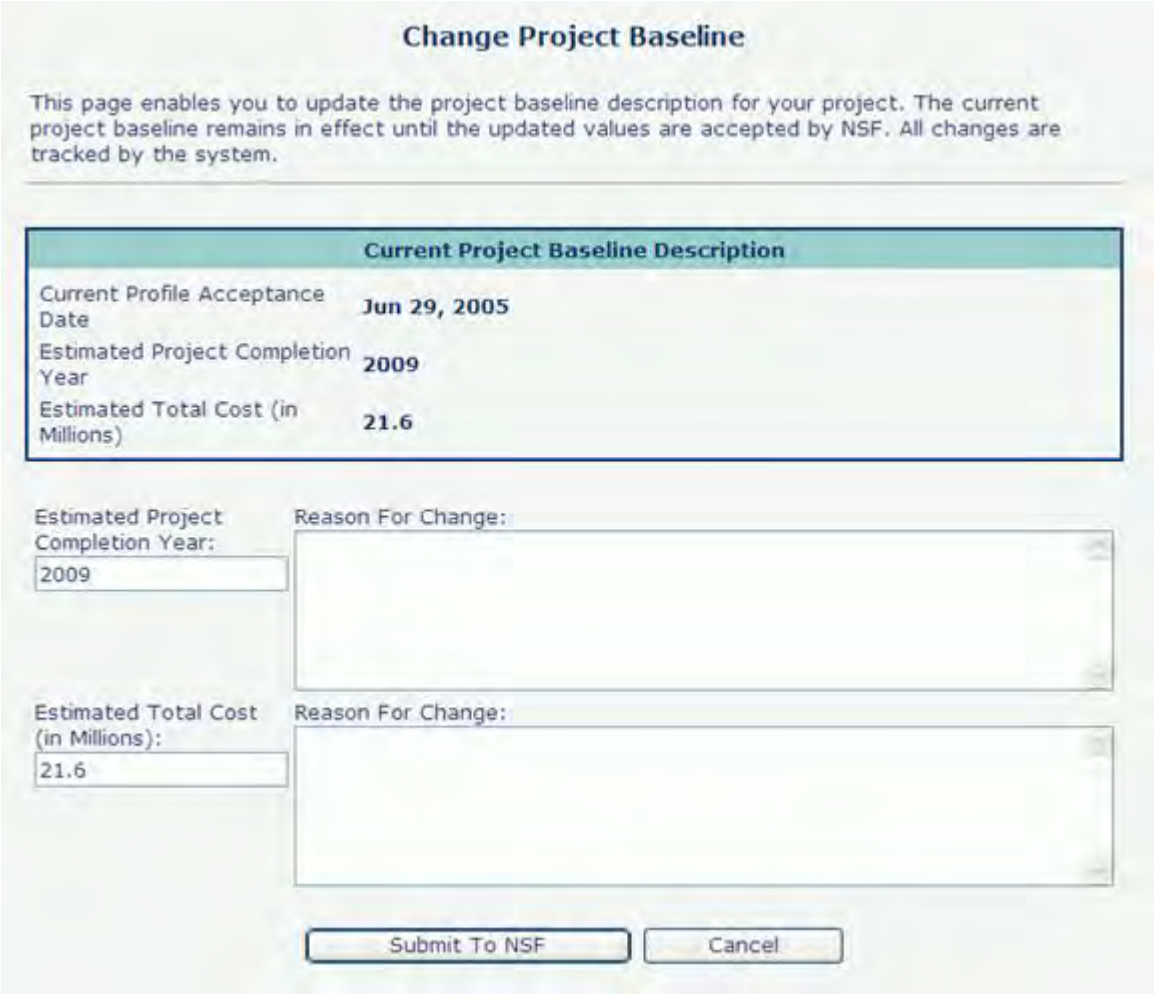


Figure 12 C/U Report, view Change Project Baseline screen.

7. To also view the history of updates to the Project Baseline Description, select the **View History** link on the Project Baseline Description detail screen (Figure 11). The history screen (Figure 13) displays the project baseline as it has evolved over the history of the project.

Construction Report - FY 2006

Click here to go back to reports list for FY 2006

This page details the changes that have occurred to the project baseline description over the lifespan of this Construction/Upgrade Project.

Project Baseline Description Version 1	
Current Profile Acceptance Date	**Jun 29, 2005**
Estimated Project Completion Year	**2009**
Estimated Total Cost (in Millions)	**21.6**

Annual Reports

Fiscal Year	Planned Value (PV) (in currently approved project plan) ($ in Mil.) (Project thru FY)	Actual Cost (AC) ($ in Mil.) (Project thru FY)	Earned Value (EV) ($ in Mil.) (Project thru FY)	Cost Variance as a percent of Project Plan	Schedule Variance as a percent of Project Plan
2005	0.42	0.17	0.29	41.4%	-31%

Project Baseline Description Version 2	
Current Profile Acceptance Date	**Jun 15, 2006**
Estimated Project Completion Year	**2010**
Estimated Total Cost (in Millions)	**25.6**

Annual Reports

Fiscal Year	Planned Value (PV) (in currently approved project plan) ($ in Mil.) (Project thru FY)	Actual Cost (AC) ($ in Mil.) (Project thru FY)	Earned Value (EV) ($ in Mil.) (Project thru FY)	Cost Variance as a percent of Project Plan	Schedule Variance as a percent of Project Plan
2006	1.41	6.45	5.33	-21%	278%

Figure 13 C/U Report, View Baseline History screen.

See also:

- Construction/Upgrade Report
- View Construction/Upgrade Report
- Construction/Upgrade Report Data
- Construction/Upgrade Report Baseline

- Construction/Upgrade Estimates Report
- Submit the Construction/Upgrade Estimate
- Submit a Construction Upgrade Estimates Report for the Second and Subsequent Year
- Construction/Upgrade Actuals Report
- Resubmit a Construction/Upgrade Report
- Resubmit a "Submitted" Construction/Upgrade Report
- Resubmit an “Under Review” or “Complete” Construction/ Upgrade Report

Construction/Upgrade Estimates Report

Figure 1 shows a Construction/Upgrade Report in the Estimate phase.

Construction Report - FY 2006

Click here to go back to reports list for FY 2006

This report is currently in the **estimates** reporting cycle. Define the planned value (in millions of dollars) through this fiscal year below. You must use the Estimates Worksheet to calculate the Planned Value. When complete, you must submit the estimates report to NSF using the submission button at the bottom of this page. The planned value is cumulative and therefore includes data for all years through the end of this fiscal year.

1. Reporting Cycle

Project Name **Scientific Ocean Drilling Vessel**

Estimates Status **Work In Progress** View Estimates Comments

Estimates Cycle Status Bar

Work In Progress | Submitted | NSF Reviewing | NSF Accepted

2. Project Status

Current Project Baseline Description History Update Project Baseline

Current Profile Acceptance Date	**Jun 24, 2005**
Estimated Project Completion Year	**2007**
Estimated Total Cost (in Millions)	**115.0**

3. Project Baseline Description

Annual Reports

Fiscal Year	Planned Value (PV) (in currently approved project plan) ($ in Mil.) (Project thru FY)	Actual Cost (AC) ($ in Mil.) (Project thru FY)	Earned Value (EV) ($ in Mil.) (Project thru FY)	Cost Variance as a percent of Project Plan	Schedule Variance as a percent of Project Plan	
2005	2.49	0.85	0.84	-1.2%	-66.3%	View Explanation
2006	0.0					

Planned Value Explanation:

Save Estimates | Open Estimates Worksheet

Estimates Submission

To submit the Planned Value through FY 2006, please enter the planned value using the estimates worksheet, and click on the submit button below. Once you have submitted this report, any changes will be tracked by the system.

Submit To NSF

4. Estimates Annual Report

Click here for Printable View

Figure 1 Construction/Upgrade Report before work has started on it (in Year Two of project).

There are four sections contained within the Report Details screen (see Figure 1) for an Estimates Construction/Upgrade Report:

- **Reporting Cycle** includes the current reporting cycle of the project and a discussion of the actions that can be performed.
- **Project Status** lists the *Project Name*, *Estimates Status*, the *Estimates Cycle Status Bar* and has a **View Estimates Comments** link. The **View Estimates Comments** link displays all comments entered by you and NSF throughout the life cycle of a report. For example, you should access this link to view the reasons a report was returned by NSF.
- **Project Baseline Description** displays the *Project Baseline Acceptance Status*, *Estimated Project Completion Year*, and *Estimated Total Cost*. In the first year of a Construction/Upgrade Report, you must enter the Current Project Baseline Description information and the Estimates Report. In subsequent reporting cycles, the Current Project Baseline Description information will be read-only since the data is not updated annually. The **View Baseline Comments** link displays all comments entered by you and NSF throughout the life cycle of a report.
- **Estimates Annual Report** displays the *Planned Value* for reporting.

Figure 2 and Figure 3 show a report that has a status of Work In Progress for the estimates reporting cycle.

Operations Reports		
Project Name	Estimates Status	Actuals Status
Integrated Ocean Drilling Program	Complete	Reopened

Figure 2 Facility List screen with a Status of Work in Progress.

Construction Report - FY 2006

Click here to go back to reports list for FY 2006

This report is currently in the **estimates** reporting cycle. First you must complete the project baseline description and submit the project baseline description to NSF for review. Then define the planned value (in millions of dollars) for the estimates through this fiscal year. When complete, you must then submit the estimates report to NSF using the submission button at the bottom of this page. The planned value is cumulative and therefore includes data for all years through this fiscal year. Both the project baseline description and the estimates report must be submitted.

Project Name **Scientific Ocean Drilling Vessel**

Estimates Status **Work In Progress** View Estimates Comments

Estimates Cycle Status Bar

Work In Progress | Submitted | NSF Reviewing | NSF Accepted

Current Project Baseline Description History Update Project Baseline

Current Profile Acceptance Date	**Work In Progress**
Estimated Project Completion Year	**2007**
Estimated Total Cost (in Millions)	**115.0**

Project Baseline Submission

To submit the Estimated Project Completion Year and Estimated Total Cost, please click on the button below. Once you have submitted this report, any changes will be tracked by the system.

Submit To NSF

Annual Reports

Fiscal Year	Planned Value (PV) (in currently approved project plan) ($ in Mil.) (Project thru FY)	Actual Cost (AC) ($ in Mil.) (Project thru FY)	Earned Value (EV) ($ in Mil.) (Project thru FY)	Cost Variance as a percent of Project Plan	Schedule Variance as a percent of Project Plan
2006	0.0				

Planned Value Explanation:

Save Estimates | Open Estimates Worksheet

Estimates Submission

To submit the Planned Value through FY 2006, please enter the planned value using the estimates worksheet, and click on the submit button below. Once you have submitted this report, any changes will be tracked by the system.

Submit To NSF

Click here for Printable View

Figure 3 Estimates C/U Report, Work In Progress, Year 1. Note the first paragraph (in red box) describes the steps to take. The Project Baseline (2nd paragraph in red box) shows the Baseline as "Work In Progress."

See also:

- Construction/Upgrade Report
- View Construction/Upgrade Report
- Construction/Upgrade Report Data
- Construction/Upgrade Report Baseline
- Submit a Construction/Upgrade Baseline for the First Year
- Submit the Construction/Upgrade Estimate
- Submit a Construction Upgrade Estimates Report for the Second and Subsequent Year
- Construction/Upgrade Actuals Report
- Resubmit a Construction/Upgrade Report
- Resubmit a "Submitted" Construction/Upgrade Report
- Resubmit an "Under Review" or "Complete" Construction/ Upgrade Report

Submit the Construction/Upgrade Estimate

1. To submit a Construction/Upgrade Estimate Report, navigate to the **Construction/Upgrade Report Detail** screen by selecting the Project Name located on the **Facility List** screen as described in View Construction/Upgrade Report.
2. The Estimates Report contains one calculated field and one text field: *Planned Value* and *Planned Value Explanation* respectively. The Planned Value is calculated on the Estimates Worksheet (see Earned Value Management for a Construction/Upgrade Report).
3. Once your Planned Value data is calculated and the Planned Value Explanation has been entered, select the **Submit to NSF** button. The **Confirm Submission** screen is displayed (Figure 1). You may either **Confirm** or **Cancel** and return to the **Construction/Upgrade Report Detail** screen.

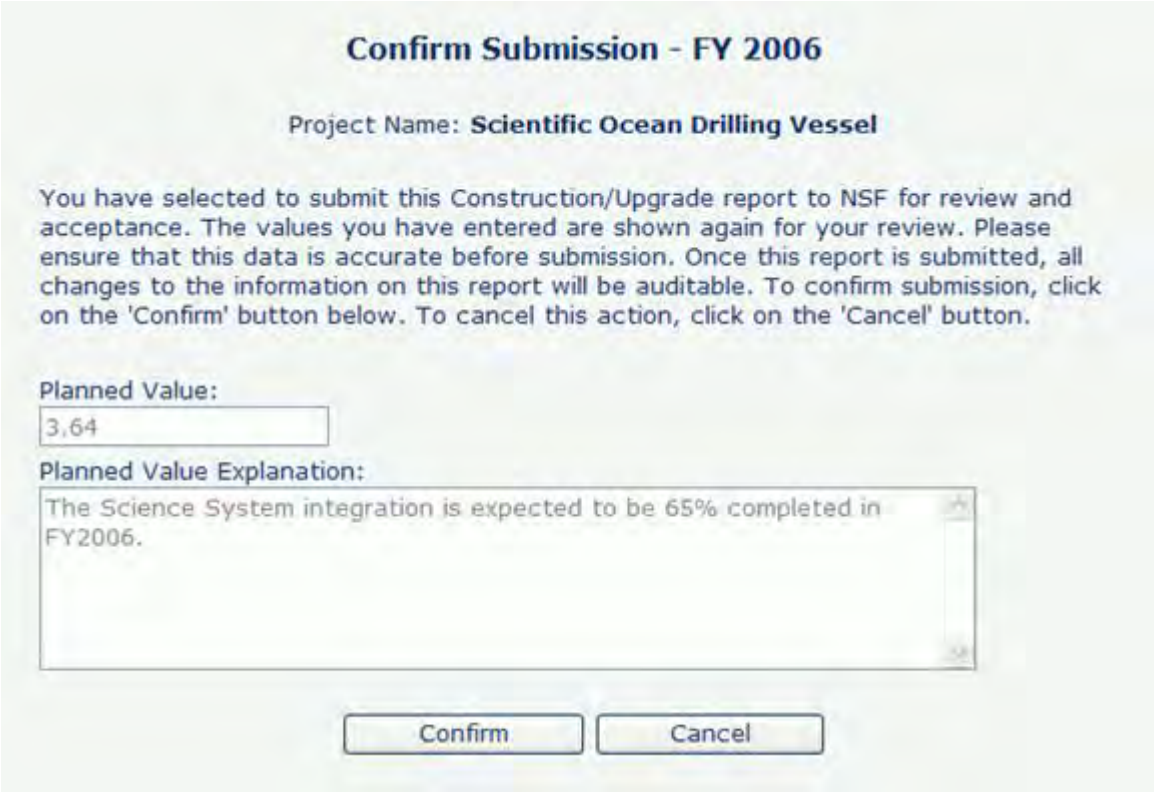
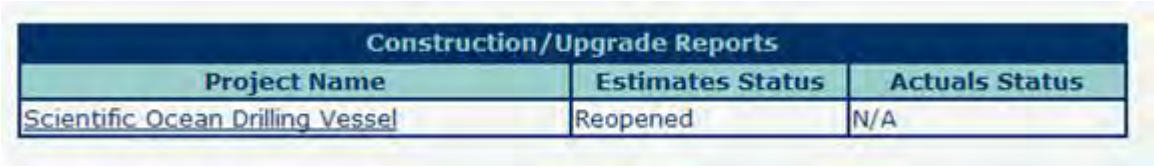


Figure 1 Confirm Submission Estimates C/U Report, Complete.

Upon submission, an email notification will be sent to NSF. You must wait for either acceptance of the report or reopening by NSF.

4. If NSF returns the Estimates Report to you, Figures 2 and 3, you will be notified via email and be required to log into FPRS to edit and resubmit your Estimates Construction/Upgrade Report. The **Facility List** screen (Figure 15) now shows the status as "reopened."



Construction/Upgrade Reports		
Project Name	Estimates Status	Actuals Status
Scientific Ocean Drilling Vessel	Reopened	N/A

Figure 2 Facility List screen with Estimates Status as Reopened.

5. To learn more about why NSF "Reopened" the report, select the **View Estimates Comments** link as shown in Figure 3. The comments, as shown in Figure 4, display.

Construction Report - FY 2006

Click here to go back to reports list for FY 2006

This report is currently in the **estimates** reporting cycle. This report has been reopened by the Program Officer. This requires you to review the comments posted by the Program Officer and make changes, if necessary. You must then resubmit this report.

Project Name **Scientific Ocean Drilling Vessel**

Estimates Status **Reopened**

View Estimates Comments

Estimates Cycle Status Bar

Work In Progress | Submitted | NSF Reviewing | NSF Accepted

Current Project Baseline Description	History Update Project Baseline
Current Profile Acceptance Date	**Jun 24, 2005**
Estimated Project Completion Year	**2007**
Estimated Total Cost (in Millions)	**115.0**

Annual Reports

Fiscal Year	Planned Value (PV) (in currently approved project plan) ($ in Mil.) (Project thru FY)	Actual Cost (AC) ($ in Mil.) (Project thru FY)	Earned Value (EV) ($ in Mil.) (Project thru FY)	Cost Variance as a percent of Project Plan	Schedule Variance as a percent of Project Plan	
2005	2.49	0.85	0.84	-1.2%	-66.3%	View Explanation
2006	3.64					

Planned Value Explanation:

The Science System integration is expected to be 65% completed in FY2006.

Save Estimates | Open Estimates Worksheet

Estimates Submission

To submit the Planned Value through FY 2006, please enter the planned value using the estimates worksheet, and click on the submit button below. Once you have submitted this report, any changes will be tracked by the system.

Submit To NSF

Click here for Printable View

Figure 3 Estimates C/U Report, Reopened. The View Estimates Comments link is circled in red.

Figure 4 Reopened comment.

6. Upon review of NSF comments, you may or may not modify the data. If you are confident that the *Planned Value* is accurate, select the **Submit to NSF** button (Figure 3) without edits. If changes are necessary, edit the *Planned Value* and resubmit.

Once NSF has accepted the Estimates Report, an email notification will be sent to you and the status of the report will be marked "Complete" on the **Facility List** screen and the *Project Status* section of the **Construction/Upgrade Report Detail** screen.

See also:

- Construction/Upgrade Report
- View Construction/Upgrade Report
- Construction/Upgrade Report Data
- Construction/Upgrade Report Baseline
- Submit a Construction/Upgrade Baseline for the First Year
- Construction/Upgrade Estimates Report
- Submit a Construction Upgrade Estimates Report for the Second and Subsequent Year
- Construction/Upgrade Actuals Report
- Resubmit a Construction/Upgrade Report
- Resubmit a "Submitted" Construction/Upgrade Report
- Resubmit an "Under Review" or "Complete" Construction/ Upgrade Report

Submit a Construction/Upgrade Estimates Report for the Second and Subsequent Year

In years subsequent to the first year, an Estimates Report will need to be submitted as well. The Project Baseline Description will be pre-populated with the accepted data from the prior fiscal year. Only the estimated *Planned Value* for the federal fiscal year will need to be submitted for Year Two and subsequent years, as shown in Figure 1.

Construction Report - FY 2006

Click here to go back to reports list for FY 2006

This report is currently in the **estimates** reporting cycle. This report has been accepted by NSF and is complete.

Project Name **Scientific Ocean Drilling Vessel**

Estimates Status **Complete** View Estimates Comments

Estimates Cycle Status Bar

Work In Progress | Submitted | NSF Reviewing | NSF Accepted

Current Project Baseline Description	History Update Project Baseline
Current Profile Acceptance Date	**Jun 5, 2006**
Estimated Project Completion Year	**2007**
Estimated Total Cost (in Millions)	**120.0**

Annual Reports

Fiscal Year	Planned Value (PV) (in currently approved project plan) ($ in Mil.) (Project thru FY)	Actual Cost (AC) ($ in Mil.) (Project thru FY)	Earned Value (EV) ($ in Mil.) (Project thru FY)	Cost Variance as a percent of Project Plan	Schedule Variance as a percent of Project Plan	
2005	2.49	0.85	0.84	-1.2%	-66.3%	View Explanation
2006	3.14					

View Estimates Worksheet

Planned Value Explanation:

The Science System integration is expected to be 55% completed in FY2006.

Click here for Printable View

To change the estimates for fiscal year 2006, click here

Figure 1 Construction/Upgrade Report: A complete estimate for Year Two. The Estimated Planned Value for the second year is circled in red.

See also:

- Construction/Upgrade Report
- View Construction/Upgrade Report
- Construction/Upgrade Report Data
- Construction/Upgrade Report Baseline
- Submit a Construction/Upgrade Baseline for the First Year
- Construction/Upgrade Estimates Report
- Submit the Construction/Upgrade Estimate
- Construction/Upgrade Actuals Report
- Resubmit a Construction/Upgrade Report
- Resubmit a "Submitted" Construction/Upgrade Report
- Resubmit an “Under Review” or “Complete” Construction/ Upgrade Report

Construction/Upgrade Actuals Report

This section describes submitting a Construction/Upgrade Report for the actuals reporting cycle. When the actuals reporting cycle is opened, navigate to the **Construction/Upgrade Report Detail** screen (Figure 1) by selecting the Project Name located on the **Facility List** screen (see Figure 6 in Navigating the FPRS) for a report that has a status of *Work In Progress* for the actuals reporting cycle.

Construction Report - FY 2006

Click here to go back to reports list for FY 2006

This report is currently in the **actuals** reporting cycle. Please enter the earned value and actual cost through this fiscal year. You must use the Actuals Worksheet to calculate the earned value and actual cost. When complete, submit the actuals report to NSF for review. The earned value and actual cost are cumulative and therefore include data for all years through the end of this fiscal year.

Project Name	**Scientific Ocean Drilling Vessel**	
Estimates Status	**Complete**	View Estimates Comments
Actuals Status	**Work In Progress**	View Actuals Comments
Actuals Cycle Status Bar	Work In Progress · Submitted · NSF Reviewing · NSF Accepted	

Current Project Baseline Description	History Update Project Baseline
Current Profile Acceptance Date	**Jun 5, 2006**
Estimated Project Completion Year	**2007**
Estimated Total Cost (in Millions)	**120.0**

Annual Reports

Fiscal Year	Planned Value (PV) (in currently approved project plan) ($ in Mil.) (Project thru FY)	Actual Cost (AC) ($ in Mil.) (Project thru FY)	Earned Value (EV) ($ in Mil.) (Project thru FY)	Cost Variance as a percent of Project Plan	Schedule Variance as a percent of Project Plan
2006	3.14	0.0	0.0	0%	0%

View Estimates Worksheet

Planned Value Explanation:

The Science System integration is expected to be 55% completed in FY2006.

Earned Value and Actual Cost Explanation:

Save Actuals Open Actuals Worksheet

Actuals Submission

To submit the Earned Value and Actual Cost through FY 2006, please enter the earned value and actual cost using the actuals worksheet, and click on the submit button below. Once you have submitted this report, any changes will be tracked by the system.

Submit To NSF

Click here for Printable View

To change the estimates for fiscal year 2006, click here

Figure 1 Actuals C/U Report—Work In Progress, Year 1. The Estimates cycle is complete (1st red box) and the Project Baseline has been accepted (2nd red box).

There are four sections contained within the **Construction/Upgrade Report Detail** screen for an Actuals Construction/Upgrade Report (as seen in Figure 2):

Construction Report - FY 2006

Click here to go back to reports list for FY 2006

This report is currently in the **actuals** reporting cycle. Please enter the earned value and actual cost through this fiscal year. You must use the Actuals Worksheet to calculate the earned value and actual cost. When complete, submit the actuals report to NSF for review. The earned value and actual cost are cumulative and therefore include data for all years through the end of this fiscal year.

1. Reporting Cycle

Project Name	**Replacement Human Occupied Vehicle: A Phased Engineering Program to Build a New 6500-M Research Submersible**
Estimates Status	**Complete** — View Estimates Comments
Actuals Status	**Work In Progress** — View Actuals Comments
Actuals Cycle Status Bar	Work In Progress · Submitted · NSF Reviewing · NSF Accepted

2. Project Status

Current Project Baseline Description	History · Update Project Baseline
Current Profile Acceptance Date	**Jun 15, 2006**
Estimated Project Completion Year	**2010**
Estimated Total Cost (in Millions)	**25.6**

3. Project Baseline Description

Annual Reports

Fiscal Year	Planned Value (PV) (in currently approved project plan) ($ in Mil.) (Project thru FY)	Actual Cost (AC) ($ in Mil.) (Project thru FY)	Earned Value (EV) ($ in Mil.) (Project thru FY)	Cost Variance as a percent of Project Plan	Schedule Variance as a percent of Project Plan	
2005	0.42	0.17	0.29	41.4%	-31%	View Explanation
2006	1.41	6.34	5.33	-18.9%	278%	

View Estimates Worksheet

Planned Value Explanation:

Does not include the purchase of Titanium which may occur this year.

Earned Value and Actual Cost Explanation:

Explain the Earned Value and Actual Cost

Save Actuals · Open Actuals Worksheet

Actuals Submission

To submit the Earned Value and Actual Cost through FY 2006, please enter the earned value and actual cost using the actuals worksheet, and click on the submit button below. Once you have submitted this report, any changes will be tracked by the system.

Submit To NSF

4. Actuals Annual Report

Click here for Printable View

To change the estimates for fiscal year 2006, click here

Figure 2 The four parts of an Actuals Construction/Upgrade Report.

1. **Reporting Cycle** includes the current reporting cycle of the project and a discussion of the actions that can be performed.
2. **Project Status** lists the *Project Name*, *Estimates Status*, *Actuals Status*, and links to *Actuals Cycle Status Bar*, **View Estimates Comments** link, and **View Actuals Comments** link. Select either the **View Estimates Comments** link or **View Actuals Comments** link to display all comments entered by you and NSF throughout the life cycle of the project.
3. **Project Baseline Description** displays the *Current Profile Acceptance Date*, *Estimated Project Completion Year*, and *Estimated Total Cost*. Once in the actuals reporting cycle, the Current Project Baseline Description will be read-only. Select the **View History** link to access any Project Baseline Description previously approved by NSF, if applicable. Select the **Update Project Baseline** link to initiate a request to rebaseline the Current Project Baseline Description.
4. **Actuals Annual Report** displays the *Earned Value* and *Actual Cost* for reporting. You must use the Earned Value Management Worksheet to calculate the Cost Variance and Schedule Variance. You are permitted to request a change to your approved estimates during the actuals reporting cycle, but this request will require NSF approval.

Construction Report - FY 2006

Click here to go back to reports list for FY 2006

This report is currently in the **actuals** reporting cycle. Please enter the earned value and actual cost through this fiscal year. You must use the Actuals Worksheet to calculate the earned value and actual cost. When complete, submit the actuals report to NSF for review. The earned value and actual cost are cumulative and therefore include data for all years through the end of this fiscal year.

Project Name	**Scientific Ocean Drilling Vessel**	
Estimates Status	**Complete**	View Estimates Comments
Actuals Status	**Work In Progress**	View Actuals Comments
Actuals Cycle Status Bar	Work In Progress · Submitted · NSF Reviewing · NSF Accepted	

Current Project Baseline Description	History Update Project Baseline
Current Profile Acceptance Date	**Jun 5, 2006**
Estimated Project Completion Year	**2007**
Estimated Total Cost (in Millions)	**120.0**

Annual Reports

Fiscal Year	Planned Value (PV) (in currently approved project plan) ($ in Mil.) (Project thru FY)	Actual Cost (AC) ($ in Mil.) (Project thru FY)	Earned Value (EV) ($ in Mil.) (Project thru FY)	Cost Variance as a percent of Project Plan	Schedule Variance as a percent of Project Plan	
2005	2.49	0.85	0.84	-1.2%	-66.3%	View Explanation
2006	3.14	0.0	0.0	0%	0%	

View Estimates Worksheet

Planned Value Explanation:

The Science System integration is expected to be 55% completed in FY2006.

Earned Value and Actual Cost Explanation:

Save Actuals | Open Actuals Worksheet

Actuals Submission

To submit the Earned Value and Actual Cost through FY 2006, please enter the earned value and actual cost using the actuals worksheet, and click on the submit button below. Once you have submitted this report, any changes will be tracked by the system.

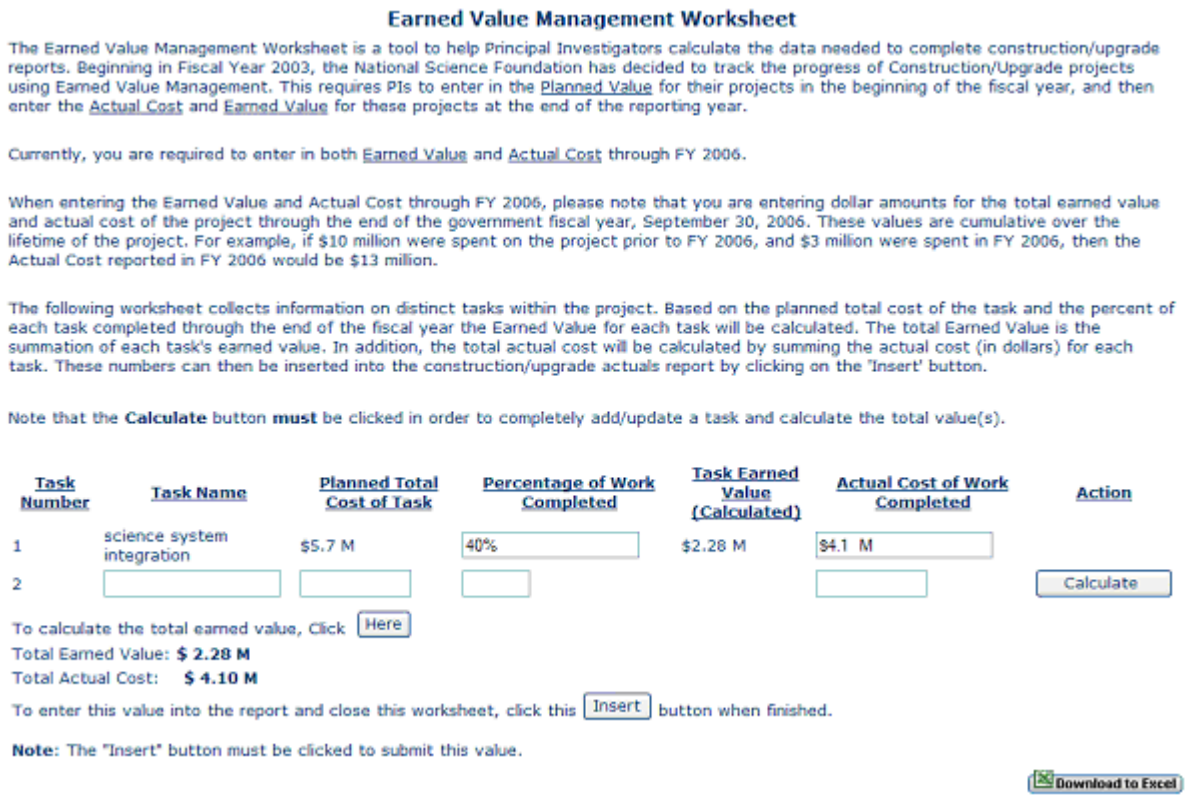
Submit To NSF

Click here for Printable View

To change the estimates for fiscal year 2006, click here

Figure 3 Actuals C/U Report, Work In Progress. The Reporting Cycle and Project Status sections are in the red box.

1. To submit a Construction/Upgrade Actuals Report, navigate to the **Construction/Upgrade Report Detail** screen (Figure 3) by selecting the Project Name located on the **Facility List** screen as described in View Construction/Upgrade Report. The Actuals Report contains two data fields—*Earned Value* and *Actual Cost*—through the fiscal year. You must use the **Earned Value Management Worksheet** (Figure 4) to enter and calculate the *Earned Value* and *Actual Cost* (see Earned Value Management for a Construction/Upgrade Report).



Earned Value Management Worksheet

The Earned Value Management Worksheet is a tool to help Principal Investigators calculate the data needed to complete construction/upgrade reports. Beginning in Fiscal Year 2003, the National Science Foundation has decided to track the progress of Construction/Upgrade projects using Earned Value Management. This requires PIs to enter in the Planned Value for their projects in the beginning of the fiscal year, and then enter the Actual Cost and Earned Value for these projects at the end of the reporting year.

Currently, you are required to enter in both Earned Value and Actual Cost through FY 2006.

When entering the Earned Value and Actual Cost through FY 2006, please note that you are entering dollar amounts for the total earned value and actual cost of the project through the end of the government fiscal year, September 30, 2006. These values are cumulative over the lifetime of the project. For example, if $10 million were spent on the project prior to FY 2006, and $3 million were spent in FY 2006, then the Actual Cost reported in FY 2006 would be $13 million.

The following worksheet collects information on distinct tasks within the project. Based on the planned total cost of the task and the percent of each task completed through the end of the fiscal year the Earned Value for each task will be calculated. The total Earned Value is the summation of each task's earned value. In addition, the total actual cost will be calculated by summing the actual cost (in dollars) for each task. These numbers can then be inserted into the construction/upgrade actuals report by clicking on the 'Insert' button.

Note that the **Calculate** button **must** be clicked in order to completely add/update a task and calculate the total value(s).

Task Number	Task Name	Planned Total Cost of Task	Percentage of Work Completed	Task Earned Value (Calculated)	Actual Cost of Work Completed	Action
1	science system integration	$5.7 M	40%	$2.28 M	$4.1 M	
2						Calculate

To calculate the total earned value, Click Here

Total Earned Value: **$ 2.28 M**

Total Actual Cost: **$ 4.10 M**

To enter this value into the report and close this worksheet, click this Insert button when finished.

Note: The "Insert" button must be clicked to submit this value.

Download to Excel

Figure 4 Earned Value Management Worksheet.

2. To open the Earned Value Management Worksheet (Figure 4), select the **Open Actuals Worksheet** button on the **Construction/Upgrade Report Detail** screen. For additional information on how to use the worksheet, see Use the Worksheet.
3. After entering the values in the worksheet, selecting either the **Here** or **Calculate** button will save the data into the task detail table. Selecting the **Insert** button will close the worksheet and redisplay the **Construction/Upgrade Report Detail** screen (Figure 5) showing the new *Cost and Schedule Variances* as a percent of your *Planned Value*.

Construction Report - FY 2006

Click here to go back to reports list for FY 2006

This report is currently in the **actuals** reporting cycle. Please enter the earned value and actual cost through this fiscal year. You must use the Actuals Worksheet to calculate the earned value and actual cost. When complete, submit the actuals report to NSF for review. The earned value and actual cost are cumulative and therefore include data for all years through the end of this fiscal year.

Project Name	**Replacement Human Occupied Vehicle: A Phased Engineering Program to Build a New 6500-M Research Submersible**	
Estimates Status	**Complete**	View Estimates Comments
Actuals Status	**Work In Progress**	View Actuals Comments
Actuals Cycle Status Bar	Work In Progress · Submitted · NSF Reviewing · NSF Accepted	

Current Project Baseline Description		History Update Project Baseline
Current Profile Acceptance Date	**Jun 15, 2006**	
Estimated Project Completion Year	**2010**	
Estimated Total Cost (in Millions)	**25.6**	

Annual Reports

Fiscal Year	Planned Value (PV) (in currently approved project plan) ($ in Mil.) (Project thru FY)	Actual Cost (AC) ($ in Mil.) (Project thru FY)	Earned Value (EV) ($ in Mil.) (Project thru FY)	Cost Variance as a percent of Project Plan	Schedule Variance as a percent of Project Plan	
2005	0.42	0.17	0.29	41.4%	-31%	View Explanation
2006	1.41	6.34	5.33	-18.9%	278%	

View Estimates Worksheet

Planned Value Explanation:

Does not include the purchase of Titanium which may occur this year.

Earned Value and Actual Cost Explanation:

Explain the Earned Value and Actual Cost

Figure 5 Construction / Upgrade Report with Actuals entered.

- For tasks existing in the estimates report, *Task Name* and *Planned Total Cost of Task* are not editable because they are from the estimates report.
- For tasks entered during the Estimates phase, values for the *Percentage of Work Completed* and *Actual Cost of Work Completed* are required.
- If there were any tasks that were not identified during the Estimates phase, they may be entered as a new task on this worksheet. **Note**: Please consider that new tasks do NOT change your total estimated values and may adversely affect your variances.

4. From the **Construction / Upgrade Report Detail** screen (Figure 5) you may either save without submitting your report by selecting the **Save Actuals** button or submit your Actuals Report by selecting the **Submit to NSF** button. If you submit your report, the **Confirm Submission screen**, Figure 6, is displayed. You may select the **Confirm** button to submit to NSF.

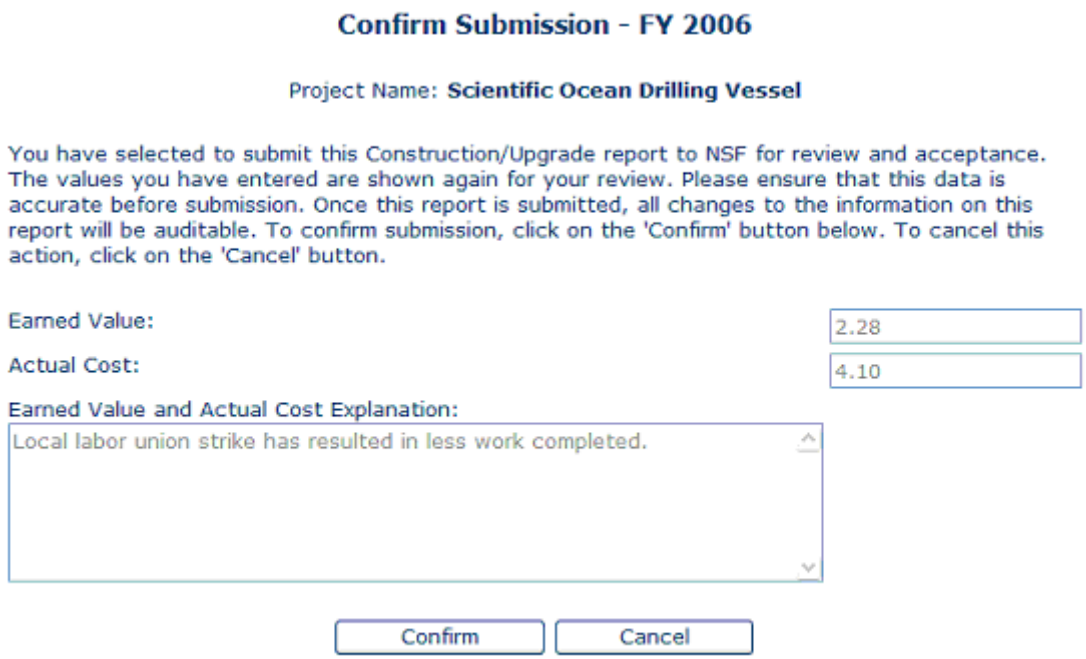


Figure 6 Actuals C / U Report, Confirm Submission screen.

5. When you select the **Confirm** submission button, the **Submit Success** screen, Figure 7, is displayed. NSF will be notified to begin a review of your report. Select the **Click here to return to the report** link to return to the **Construction / Upgrade Report Detail** screen. Actuals now read-only while reviewing it.

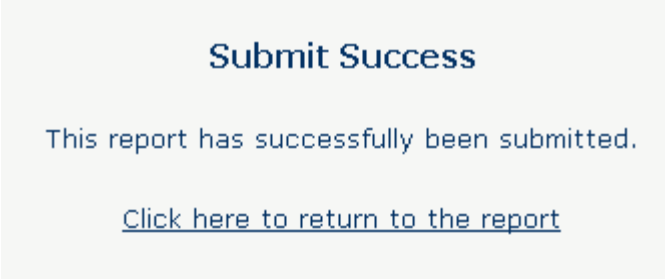


Figure 7 Actuals C/U Report, Submit Success.

After NSF has approved the report, you will be notified by email that your report has been accepted. If the report is accepted, your process is complete for this fiscal year. Figure 8 shows the Facility List screen showing a completed report for the current fiscal year.

Construction/Upgrade Reports		
Project Name	Estimates Status	Actuals Status
Scientific Ocean Drilling Vessel	Complete	Complete

Figure 8 Facility List screen showing a completed report for the current fiscal year.

However, if the report is returned to you, you will again be notified by email to log back into FPRS to resubmit your Actuals Report. You may log into FPRS and view the status of a report on the **Facility List** screen (Figure 9). Please refer to View Construction/Upgrade Report.

Construction/Upgrade Reports		
Project Name	Estimates Status	Actuals Status
Scientific Ocean Drilling Vessel	Complete	Reopened

Figure 9 Facility List screen showing a Reopened Actuals report.

1. To view the reasons why the Actuals Report has been returned to you, select the **View Actuals Comments** link (circled in red in Figure 10).

Construction Report - FY 2006

Click here to go back to reports list for FY 2006

This report is currently in the **actuals** reporting cycle. This report has been reopened by the Program Officer. This requires you to review the comments posted by the Program Officer and make changes, if necessary. You must then resubmit this report.

Project Name **Scientific Ocean Drilling Vessel**
Estimates Status **Complete**
Actuals Status **Reopened**
Actuals Cycle Status Bar

View Estimates Comments
View Actuals Comments

Work In Progress | Submitted | NSF Reviewing | NSF Accepted

Current Project Baseline Description		History Update Project Baseline
Current Profile Acceptance Date	Jun 5, 2006	
Estimated Project Completion Year	2007	
Estimated Total Cost (in Millions)	120.0	

Annual Reports

Fiscal Year	Planned Value (PV) (in currently approved project plan) ($ in Mil.) (Project thru FY)	Actual Cost (AC) ($ in Mil.) (Project thru FY)	Earned Value (EV) ($ in Mil.) (Project thru FY)	Cost Variance as a percent of Project Plan	Schedule Variance as a percent of Project Plan	
2005	2.49	0.85	0.84	-1.2%	-66.3%	View Explanation
2006	3.14	4.1	2.28	-79.8%	-27.4%	

View Estimates Worksheet

Planned Value Explanation:

The Science System integration is expected to be 55% completed in FY2006.

Earned Value and Actual Cost Explanation:

Local labor union strike has resulted in less work completed.

Save Actuals | Open Actuals Worksheet

Actuals Submission

To submit the Earned Value and Actual Cost through FY 2006, please enter the earned value and actual cost using the actuals worksheet, and click on the submit button below. Once you have submitted this report, any changes will be tracked by the system.

Submit To NSF

Click here for Printable View

To change the estimates for fiscal year 2006, click here

Figure 10 Actuals C/U Report, Reopened by NSF. The View Actuals Comments link is circled in red.

2. Upon review, you may or may not modify your Actuals Report. If you are confident that the previous submission is accurate, then select the **Submit to NSF** button without editing the report. If you deem that modifications are necessary, you will make the edits either directly in the fields or use the **Open Actuals Worksheet** to compute your performance data. To submit your new Actuals Report, select the **Submit to NSF** button.
3. The **Confirm Submission** screen, Figure 11, is displayed. You may **Confirm** to submit to NSF.

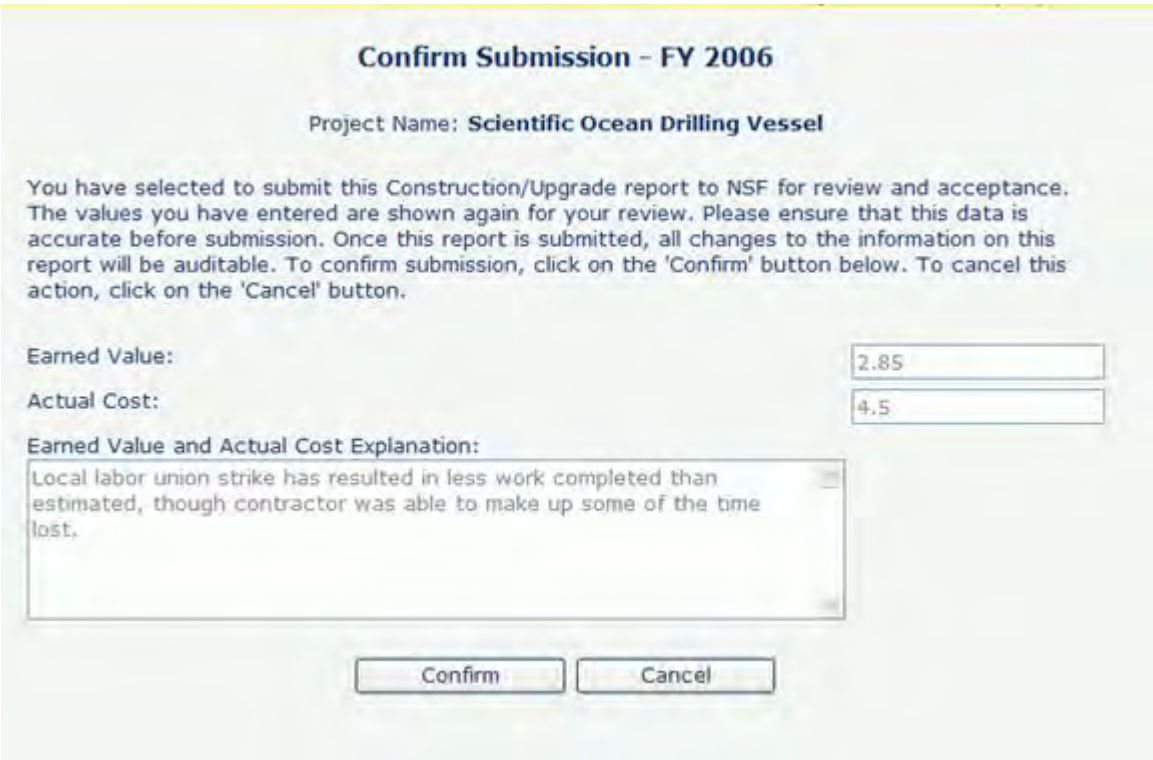


Figure 11 Actuals C/U Report, Confirm Submission screen.

4. When you select the **Confirm** submission button, the **Submit Success** screen is displayed (Figure 12). NSF will be notified that your report is available to be reviewed.

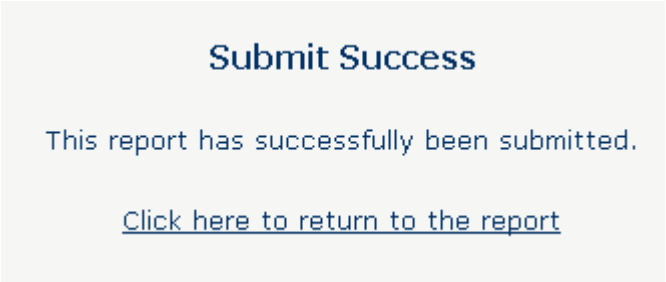


Figure 12 Actuals C/U Report, Submit Success.

5. Select the **Click here to return to the report link** to return to the **Construction/Upgrade Report Detail** screen (Figure 14). Your Actuals Report is now read-only while NSF is reviewing it. You will receive an email notification once NSF has accepted the Actuals Report marking the report "Complete." The **Facility List** screen (Figure 13) will also show the status as complete.

Construction/Upgrade Reports		
Project Name	**Estimates Status**	**Actuals Status**
Scientific Ocean Drilling Vessel	Complete	Complete

Figure 13 Facility List screen with the Actuals Status Complete.

Construction Report - FY 2006

Click here to go back to reports list for FY 2006

This report is currently in the **actuals** reporting cycle. This report has been accepted by NSF and is complete.

Project Name	**Replacement Human Occupied Vehicle: A Phased Engineering Program to Build a New 6500-M Research Submersible**	
Estimates Status	**Complete**	View Estimates Comments
Actuals Status	**Complete**	View Actuals Comments
Actuals Cycle Status Bar	Work In Progress · Submitted · NSF Reviewing · NSF Accepted	

Current Project Baseline Description		History Update Project Baseline
Current Profile Acceptance Date	**Jun 15, 2006**	
Estimated Project Completion Year	**2010**	
Estimated Total Cost (in Millions)	**25.6**	

Annual Reports

Fiscal Year	Planned Value (PV) (in currently approved project plan) ($ in Mil.) (Project thru FY)	Actual Cost (AC) ($ in Mil.) (Project thru FY)	Earned Value (EV) ($ in Mil.) (Project thru FY)	Cost Variance as a percent of Project Plan	Schedule Variance as a percent of Project Plan	
2005	0.42	0.17	0.29	41.4%	-31%	View Explanation
2006	1.41	6.45	5.33	-21%	278%	

View Estimates Worksheet

Planned Value Explanation:

Does not include the purchase of Titanium which may occur this year.

View Actuals Worksheet

Earned Value and Actual Cost Explanation:

Explain the Earned Value and Actual Cost

Click here for Printable View

To change the actuals for fiscal year 2006, click here

To change the estimates for fiscal year 2006, click here

Figure 14 Actuals C/U Report, Complete.

See also:

- Construction/Upgrade Report
- View Construction/Upgrade Report
- Construction/Upgrade Report Data
- Construction/Upgrade Report Baseline
- Submit a Construction/Upgrade Baseline for the First Year
- Construction/Upgrade Estimates Report
- Submit the Construction/Upgrade Estimate
- Submit a Construction Upgrade Estimates Report for the Second and Subsequent Year
- Resubmit a Construction/Upgrade Report
- Resubmit a "Submitted" Construction/Upgrade Report
- Resubmit an “Under Review” or “Complete” Construction/ Upgrade Report

Resubmit a Construction/Upgrade Report

FPRS gives you the capability to resubmit reports if corrections are required. This ensures that you are always comfortable and confident in the data submitted to NSF. The overarching guidelines defined by NSF are:

- **Guideline 1. Project Baseline Description** can be resubmitted during the estimates or actuals reporting cycles throughout the entire life cycle of the project.
- **Guideline 2. Estimated Performance Data** can be resubmitted during the estimates or actuals reporting cycles, but NSF must accept the changes.
- **Guideline 3. Actual Performance Data** can be resubmitted during the actuals reporting cycle only. Actual performance data does not exist during the estimates reporting cycle, and therefore, it is not available in FPRS.
- **Guideline 4.** Once the fiscal year is closed for reporting by NSF, the Construction/Upgrade Report is available as read-only.

FPRS recognizes three types of resubmission conditions that apply to both the estimates and actuals reporting cycles. The first condition, *Reopened*, has been described in detail in Step 4 through Step 6 in the Submit the Construction/Upgrade Estimate—Returned for Revision section. This section focuses on the two remaining conditions.

- **Reopened**: If you have submitted a report and NSF has returned the report, you can view NSF comments for revision, revise the report, and resubmit an updated report.

- **Submitted**: If you have submitted a report to NSF and this report has not been reviewed or accepted by NSF, you may resubmit the report with the new values to be accepted by NSF.

- **Under Review** or **Completed**: If you have submitted a report to NSF and NSF has accepted this report, you may still resubmit the report. FPRS will present NSF with both the new report and the previously accepted report for review. NSF may either accept the new report or accept the prior report. For a more detailed description of each state please refer to Workflow.

At any point in the report preparation, if you are not sure of what an item means, select the underscored item and the term definition (Figure 1) is displayed.

FPRS Definition

Term: Percentage of Work Completed

Definition: The actual percentage complete that this task is at the end of the fiscal year.

Figure 1 A term definition.

See also:

- Construction/Upgrade Report
- View Construction/Upgrade Report
- Construction/Upgrade Report Data
- Construction/Upgrade Report Baseline
- Submit a Construction/Upgrade Baseline for the First Year
- Construction/Upgrade Estimates Report
- Submit the Construction/Upgrade Estimate
- Submit a Construction Upgrade Estimates Report for the Second and Subsequent Year
- Construction/Upgrade Actuals Report
- Resubmit a "Submitted" Construction/Upgrade Report
- Resubmit an “Under Review” or “Complete” Construction/ Upgrade Report

Resubmit a "Submitted" Construction/Upgrade Report

This section identifies the process you would perform to change and resubmit a report that has already been submitted, but has not yet entered the “Under Review” state. This example follows the resubmission of an Actuals Construction/Upgrade Report. This process would execute exactly the same for an Estimates Construction/Upgrade Report.

1. You must first navigate to the **Construction/Upgrade Report Detail** screen (Figure 1) (see Navigating the FPRS). In Figure 1, you have already submitted an Actuals Construction/Upgraded Report. The report is currently read-only.

Construction Report - FY 2006

Click here to go back to reports list for FY 2006

This report is currently in the **actuals** reporting cycle. This report has been submitted. In order to change any information, you must submit a request to NSF by clicking on the appropriate link at the bottom of the page.

Project Name	**Replacement Human Occupied Vehicle: A Phased Engineering Program to Build a New 6500-M Research Submersible**	
Estimates Status	**Complete**	View Estimates Comments
Actuals Status	**Submitted**	View Actuals Comments
Actuals Cycle Status Bar	Work In Progress · Submitted · NSF Reviewing · NSF Accepted	

Current Project Baseline Description	History Update Project Baseline
Current Profile Acceptance Date	**Jun 15, 2006**
Estimated Project Completion Year	**2010**
Estimated Total Cost (in Millions)	**25.6**

Annual Reports

Fiscal Year	Planned Value (PV) (in currently approved project plan) ($ in Mil.) (Project thru FY)	Actual Cost (AC) ($ in Mil.) (Project thru FY)	Earned Value (EV) ($ in Mil.) (Project thru FY)	Cost Variance as a percent of Project Plan	Schedule Variance as a percent of Project Plan	
2005	0.42	0.17	0.29	41.4%	-31%	View Explanation
2006	1.41	6.34	5.33	-18.9%	278%	

View Estimates Worksheet

Planned Value Explanation:

Does not include the purchase of Titanium which may occur this year.

View Actuals Worksheet

Earned Value and Actual Cost Explanation:

Explain the Earned Value and Actual Cost

Click here for Printable View

To change the actuals for fiscal year 2006, click here

To change the estimates for fiscal year 2006, click here

Figure 1 Actuals C/U Report, Submitted.

2. To resubmit actuals performance data, select the **To change the actuals for fiscal year *nnnn*, click here** link at the bottom of the screen. (Note that there is also a link to change the estimates report as well. Again, this is a component of the flexible design to accommodate NSF Guideline 1 described in Resubmit a Construction/Upgrade Report.) The **Request to Change Actuals** screen is displayed (see Figure 2) and shows the submitted actuals values.

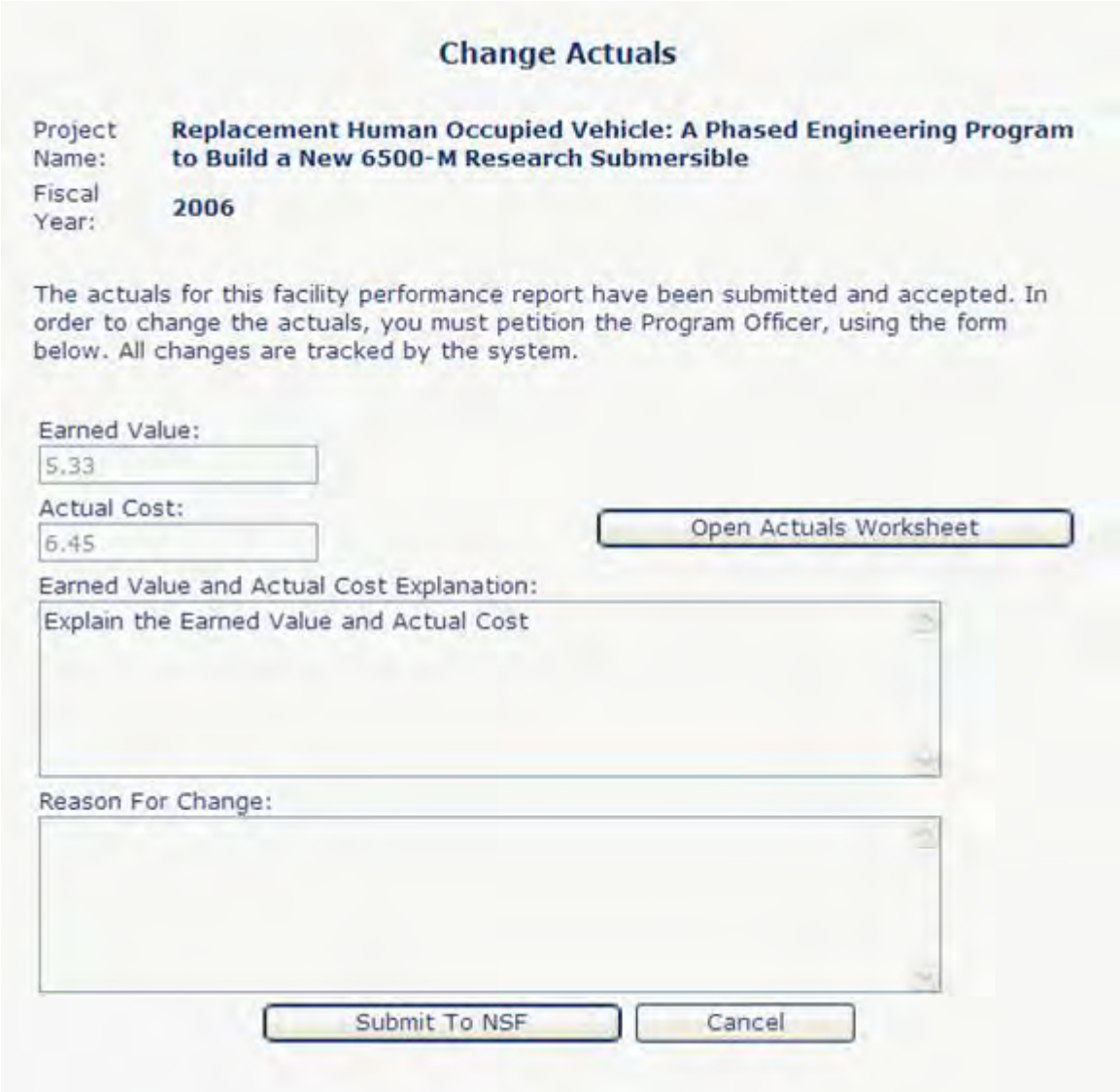


Figure 2 Actuals C/U Report, Change Actuals screen for resubmission to NSF.

3. If these values need to be revised, you must open the **Actuals Worksheet** to make these revisions by selecting the Open Actuals Worksheet button. (For instructions on how to use the worksheet, see Earned Value Management for a Construction/Upgrade Report.)

4. Once revisions have been calculated and inserted into the main page, you may resubmit these values by entering a ***Reason For Change*** in the appropriate text box. The *Reason For Change* is mandatory to provide you with an opportunity to state to NSF why changes are necessary.
5. Select the **Submit to NSF** button. When you select the **Submit to NSF** button, the **Confirm Submission** screen (Figure 3) will be displayed.

Figure 3 Actuals C/U Report, Confirm Submission screen.

6. Select the **Confirm** button to change the previously reported data. The **Submit Success** screen will appear (Figure 4), indicating that your modifications have been successfully resubmitted to NSF.

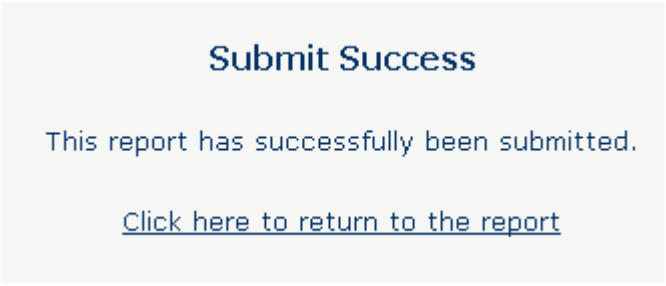


Figure 4. Actuals C/U Report—Submit Success.

7. Select the link, **Click here to return to the report,** to return to the report. When you return to the **Construction/Upgrade Report Detail** screen, you will see that the data has been modified and that the current actuals status is still "Submitted." You may continue to change this report in this manner while the status is "Submitted."

See also:

- Construction/Upgrade Report
- View Construction/Upgrade Report
- Construction/Upgrade Report Data
- Construction/Upgrade Report Baseline
- Submit a Construction/Upgrade Baseline for the First Year
- Construction/Upgrade Estimates Report
- Submit the Construction/Upgrade Estimate
- Submit a Construction Upgrade Estimates Report for the Second and Subsequent Year
- Construction/Upgrade Actuals Report
- Resubmit a Construction/Upgrade Report
- Resubmit an "Under Review" or "Complete" Construction/ Upgrade Report

Resubmit an "Under Review" or "Complete" Construction/ Upgrade Report

This section identifies the process you would perform to change and resubmit a report that has already begun review by NSF. This applies to reports that are either in the "Under Review" or "Complete" state. This example follows the resubmission of an Actuals Construction/Upgrade Report. This process would execute exactly the same for an Estimates Construction/Upgrade Report.
You must first navigate to the **Construction/Upgrade Report Detail** screen (Figure 1) (see Navigating the FPRS).

Construction Report - FY 2006

Click here to go back to reports list for FY 2006

This report is currently in the **actuals** reporting cycle. This report has been submitted. In order to change any information, you must submit a request to NSF by clicking on the appropriate link at the bottom of the page.

Project Name	**Replacement Human Occupied Vehicle: A Phased Engineering Program to Build a New 6500-M Research Submersible**	
Estimates Status	**Complete**	View Estimates Comments
Actuals Status	**Under Review**	View Actuals Comments
Actuals Cycle Status Bar	Work In Progress · Submitted · NSF Reviewing · NSF Accepted	

Current Project Baseline Description	History Update Project Baseline
Current Profile Acceptance Date	**Jun 15, 2006**
Estimated Project Completion Year	**2010**
Estimated Total Cost (in Millions)	**25.6**

Annual Reports

Fiscal Year	Planned Value (PV) (in currently approved project plan) ($ in Mil.) (Project thru FY)	Actual Cost (AC) ($ in Mil.) (Project thru FY)	Earned Value (EV) ($ in Mil.) (Project thru FY)	Cost Variance as a percent of Project Plan	Schedule Variance as a percent of Project Plan	
2005	0.42	0.17	0.29	41.4%	-31%	View Explanation
2006	1.41	6.34	5.33	-18.9%	278%	

View Estimates Worksheet

Planned Value Explanation:

Does not include the purchase of Titanium which may occur this year.

View Actuals Worksheet

Earned Value and Actual Cost Explanation:

Explain the Earned Value and Actual Cost

Click here for Printable View

To change the actuals for fiscal year 2006, click here

To change the estimates for fiscal year 2006, click here

Figure 1 Actuals C/U Report, Under Review by NSF.

In this scenario, you have submitted the Actuals Construction/Upgrade Report and NSF has already begun the review process, as shown in the Facility List screen (Figure 2). As a result, any resubmission by you will require NSF approval.

Construction/Upgrade Reports		
Project Name	Estimates Status	Actuals Status
Scientific Ocean Drilling Vessel	Complete	Under Review

Figure 2 The Facility List screen with an Actual status of Under Review.

1. The report is currently read-only (Figure 1). To resubmit actuals performance data, select the **To change the actuals for fiscal year *nnnn*** link at the bottom of the screen (Figure 1). (Note that there is also a link to change the estimates report as well. Again, this is a component of the flexible design to accommodate NSF Guideline 2 described above at the beginning of Resubmit a Construction/Upgrade Report.) The **Request to Change Actuals** screen is displayed (see Figure 3) and shows the submitted actuals values.

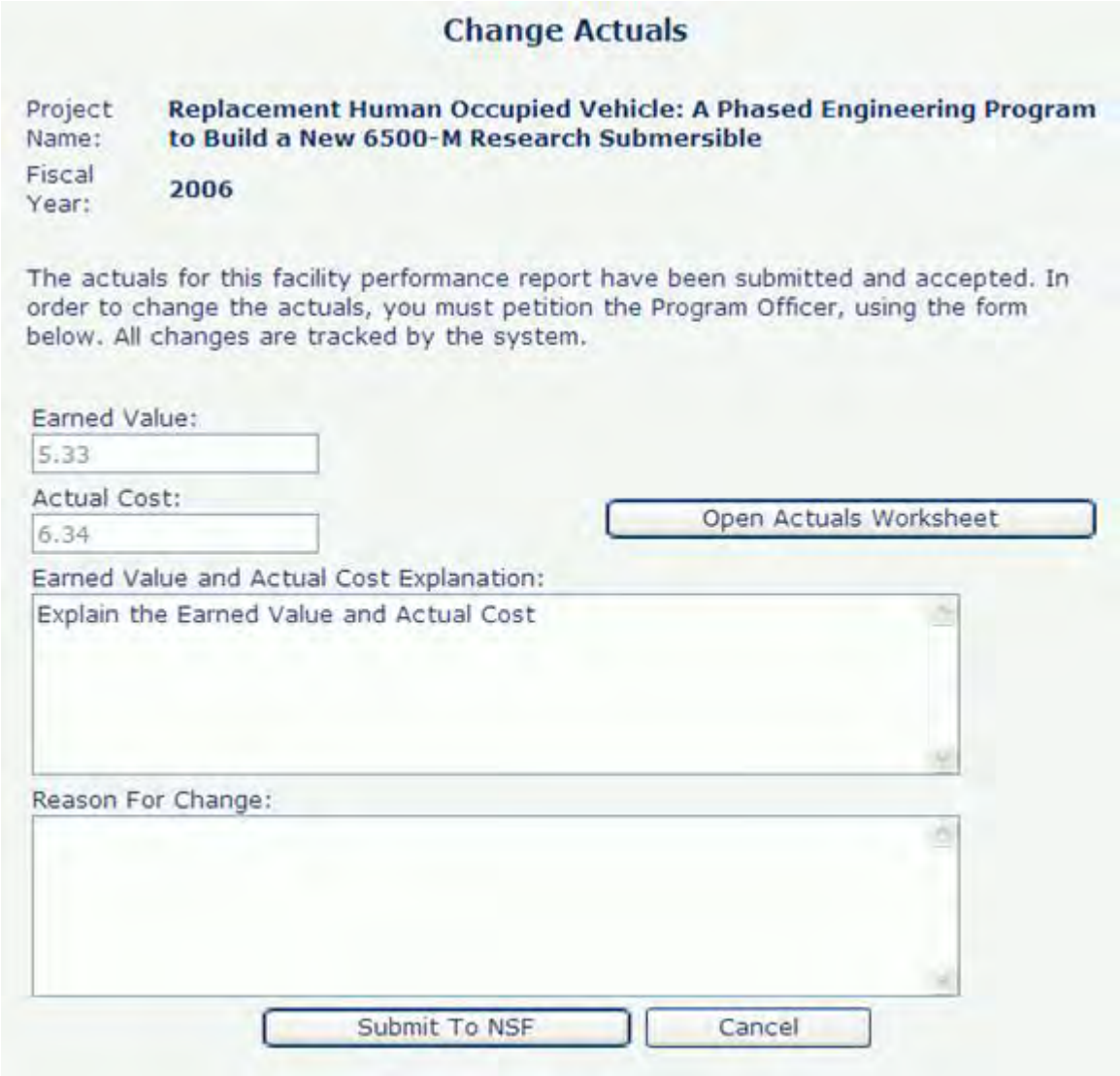


Figure 3 Actuals C/U Report—Change Actuals screen to resubmit data.

2. If these values need to be revised, you must open the **Actuals Worksheet** to make these revisions by selecting the **Open Actuals Worksheet** button. (For instructions on how to use the worksheet, see Use the Worksheet in the Earned Value Management for a Construction/Upgrade Report).
3. Once revisions have been calculated and inserted into the main page, you may resubmit these values by entering a ***Reason For Change*** in the appropriate text box. The *Reason For Change* is mandatory to give you an opportunity to state to NSF why changes are necessary.
4. Select the **Submit to NSF** button. The **Confirm Submission** screen will be displayed (Figure 4). Again, you may continue by selecting the **Confirm** button.

Figure 4 Actuals C/U Report. Confirm Submission.

5. Select the **Confirm** button. The **Submit Success** screen (Figure 5) will be displayed, indicating that your petition to modify your Actuals values has been submitted to NSF successfully.

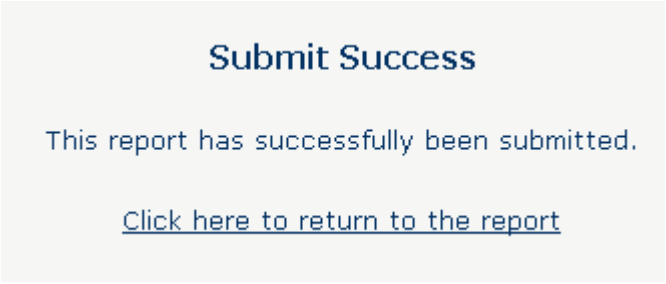


Figure 5 Actuals C/U Report, Submit Success.

6. From the **Submit Success** screen, select the **Click here to return to the report** link to view the report. The **Actuals C/U Report, Resubmitted by PI** screen will be displayed (Figure 6).

Construction Report - FY 2006

Click here to go back to reports list for FY 2006

This report is currently in the **actuals** reporting cycle. This report has been resubmitted after acceptance. To view your resubmitted values, click on the link at the bottom of this page.

Project Name	**Replacement Human Occupied Vehicle: A Phased Engineering Program to Build a New 6500-M Research Submersible**	
Estimates Status	**Complete**	View Estimates Comments
Actuals Status	**Resubmitted by PI**	View Actuals Comments
Actuals Cycle Status Bar	Work In Progress · Submitted · NSF Reviewing · NSF Accepted	

Current Project Baseline Description	History Update Project Baseline
Current Profile Acceptance Date	**Jun 15, 2006**
Estimated Project Completion Year	**2010**
Estimated Total Cost (in Millions)	**25.6**

Annual Reports

Fiscal Year	Planned Value (PV) (in currently approved project plan) ($ in Mil.) (Project thru FY)	Actual Cost (AC) ($ in Mil.) (Project thru FY)	Earned Value (EV) ($ in Mil.) (Project thru FY)	Cost Variance as a percent of Project Plan	Schedule Variance as a percent of Project Plan	
2005	0.42	0.17	0.29	41.4%	-31%	View Explanation
2006	1.41	6.34	5.33	-18.9%	278%	

View Estimates Worksheet

Planned Value Explanation:

Does not include the purchase of Titanium which may occur this year.

View Actuals Worksheet

Earned Value and Actual Cost Explanation:

Explain the Earned Value and Actual Cost

Click here for Printable View

To view the resubmitted actuals for fiscal year 2006, click here

To change the estimates for fiscal year 2006, click here

Figure 6 Actuals C/U Report, Resubmitted by PI.

The new actuals report status is *Resubmitted by PI*, and the newly submitted values are not shown in this report—only the prior values are there because the new report is awaiting NSF review and acceptance. Notice that the **To change the actuals for fiscal year *nnnn*, click here** link is removed and is replaced with the link **To view the resubmitted actuals for fiscal year *nnnn*, select here.** Select this link to view your report submission (Figure 7).

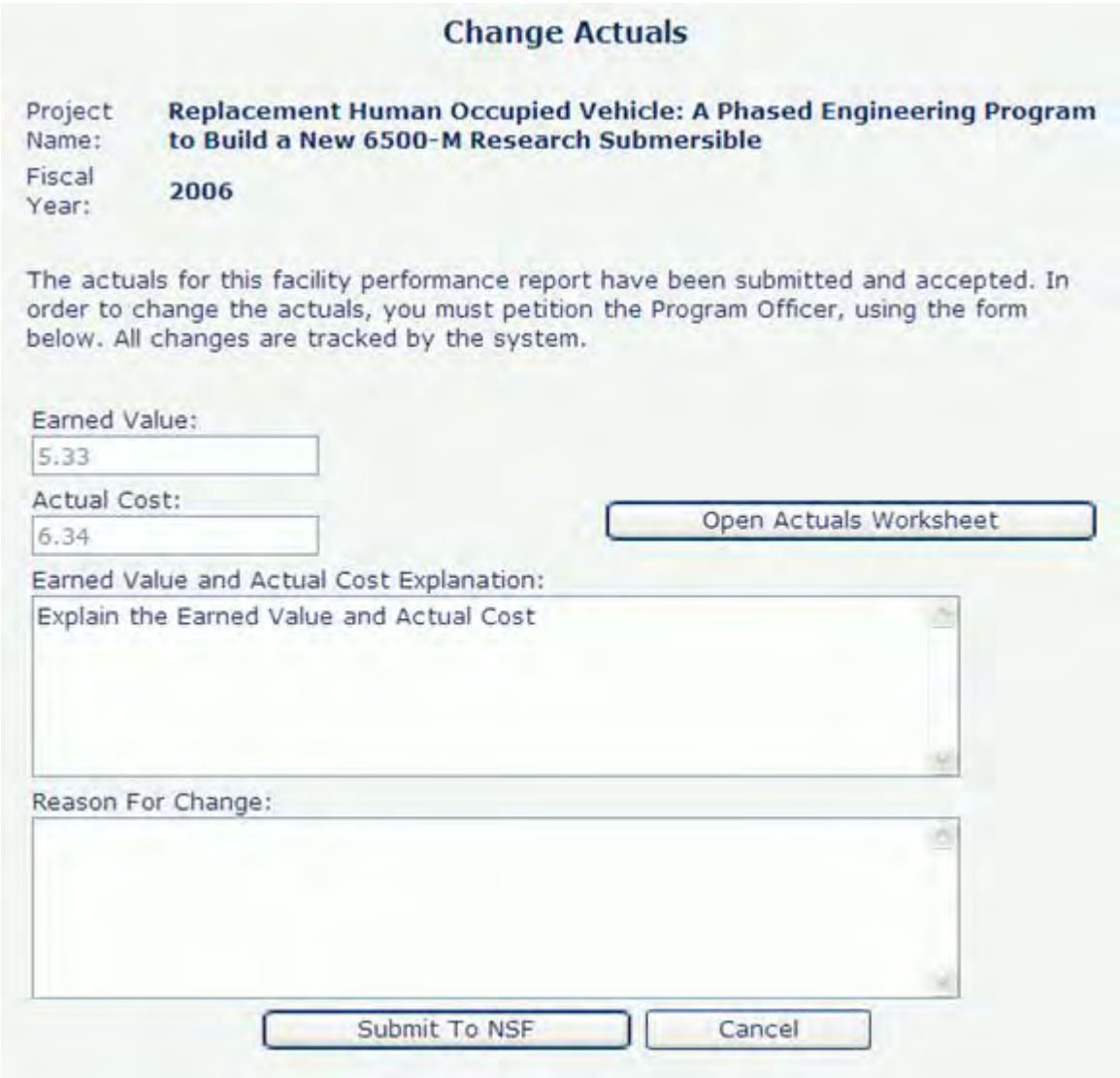


Figure 7 Actuals C/U Report, Change Actuals screen.

The report resubmission is now awaiting NSF review. NSF will be notified of the resubmission and may either accept the new report or revert to the previous report.

See also:

- Construction/Upgrade Report
- View Construction/Upgrade Report

- Construction/Upgrade Report Data
- Construction/Upgrade Report Baseline
- Submit a Construction/Upgrade Baseline for the First Year
- Construction/Upgrade Estimates Report
- Submit the Construction/Upgrade Estimate
- Submit a Construction Upgrade Estimates Report for the Second and Subsequent Year
- Construction/Upgrade Actuals Report
- Resubmit a Construction/Upgrade Report
- Resubmit a "Submitted" Construction/Upgrade Report

Earned Value

Earned Value Management for a Construction/Upgrade Report

Construction/Upgrade Reports introduces a new method for reporting project performance called Earned Value Management (EVM). EVM is an integrated system of project management and control that enables a Principal Investigator and/or Project Manager to monitor the progress of a project in terms of integrated cost, schedule, and technical performance measures. Earned Value Management is a methodology used to measure and communicate the real physical progress of a project, taking into account the work completed, the time taken, and the costs incurred to complete that work. Earned Value helps evaluate and control project risk by measuring project progress in monetary terms. Traditional project management practice tends to compare actual costs with planned expenditure, and confuses actual costs with actual progress. Actual costs are not necessarily a good measure of progress. EVM provides a third reference point that is an objective view of the status of the project, i.e. the value to the end goal of the work completed to date. This can be compared with both the planned expenditure and the actual costs to determine the performance to date and to give early indications of problems. EVM may also be used to enhance cost forecasting, risk management, and as the basis for payment against the project.

For EVM to be implemented, there must be a system that can accurately measure the following three fundamental factors:

- **Planned Value (PV)**, also known as the Budgeted Cost of Work Scheduled (BCWS), represents the estimated value in dollars of the work to be accomplished as scheduled throughout the project.

- **Earned Value (EV)**, also known as the Budgeted Cost of Work Performed (BCWP), represents the planned costs of the work allocated to the completed activities (or portions of activities) throughout the project.

- **Actual Cost (AC)**, also known as the Actual Cost of Work Performed (ACWP), represents the costs actually incurred in accomplishing the work performed throughout the project. The real costs of the work are charged against the completed activities (or portions of activities).

At the heart of EVM is the Work Breakdown Structure (WBS). The WBS is the hierarchical structure of a project starting with high-level objectives, extending downward to sub-objectives, and finally to the lowest level of the structure—the individual work packages. The WBS includes the corresponding schedules for each sub-element of the project. It is a consistent, visual framework that displays and defines the products as elements that relate to the end product. The schedules for the WBS should be planned to the work package level and organized and linked to form a coherent, integrated overall project. ***Earned Value is***

based on assigning a value to the activity upon completion of the work. Completion of the work must be determined by objective measures such as milestones or deliverables.

In managing projects, it is useful to track Earned Value along with planned and actual costs over time. The simplest progress reports comprise a basic tabulation of PV, EV, and AC and variances, which are measured in terms of resources such as man-hours or cost. **Any technical performance, schedule, or cost deviation from a specific project plan is called a "variance."** Typical sources of variances are: failure of a technical design to meet performance specs; underestimating time to perform certain tasks or procure items; and underestimating cost of materials or services, for example using an outdated vendor quote.

The two types of variances are:

- **Cost Variance** (CV) – The difference between the amount of work completed (EV) and the amount that was actually expended (AC) for an element of work. A negative variance means that more money was spent for the work accomplished than was planned. Cost Variance is obtained by comparing actual cost with earned value: Cost Variance = (Earned Value – Actual Cost)

- **Schedule Variance** (SV) – The difference between the amount of work completed and the estimated budget (PV) for an element of work. Any difference is called the Schedule Variance. Schedule Variance is obtained by comparing earned value with planned value: Schedule Variance =(Earned Value – Planned Value)

- For GPRA reporting purposes (see Government Performance & Results Act Goals for more information on NSF's GPRA Goals), the CV and SV are then used to measure performance relative to the project plan.

This information is expressed as a percentage of the Planned Value.

- CV as a % of PV = (Earned Value – Actual Cost) / Planned Value

- SV as a % of PV =(Earned Value – Planned Value) / Planned Value

A "challenge" in using Earned Value is that you need to know the percentage of a task that has been completed. Projects with full Earned Value Management systems in place may use precise estimates to determine the percentage complete in accordance with methodologies approved by NSF. Projects that do not have full Earned Value Management systems implemented should determine the percentage by less precise means from project plans established for those tasks. These less precise means provide reduced visibility into project status and expose a project to greater risk*.

* At a minimum, for purposes of GPRA reporting only and not for project management, it is sufficient to label tasks that have not begun at 0% complete and task that have been completed at 100% complete. For incomplete tasks, the 50/50 rule is to be used: once begun, the task is assumed to be 50% complete and only when a task has been completed is the whole value earned until you have the capability to manage, track, and report more accurately the percentage of a task that has been completed to calculate Earned Value.

See also:

- Earned Value Management Scenarios
- Use the Worksheet
- Earned Value Management Summary

See also:

- An Introduction to the NSF Facility Performance Reporting System

- Operations Reports
- Construction/Upgrade Report

Earned Value Management for a Construction/Upgrade Report

Construction/Upgrade Reports introduces a new method for reporting project performance called Earned Value Management (EVM). EVM is an integrated system of project management and control that enables a Principal Investigator and/or Project Manager to monitor the progress of a project in terms of integrated cost, schedule, and technical performance measures. Earned Value Management is a methodology used to measure and communicate the real physical progress of a project, taking into account the work completed, the time taken, and the costs incurred to complete that work. Earned Value helps evaluate and control project risk by measuring project progress in monetary terms. Traditional project management practice tends to compare actual costs with planned expenditure, and confuses actual costs with actual progress. Actual costs are not necessarily a good measure of progress. EVM provides a third reference point that is an objective view of the status of the project, i.e. the value to the end goal of the work completed to date. This can be compared with both the planned expenditure and the actual costs to determine the performance to date and to give early indications of problems. EVM may also be used to enhance cost forecasting, risk management, and as the basis for payment against the project.

For EVM to be implemented, there must be a system that can accurately measure the following three fundamental factors:

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- **Earned Value (EV)**, also known as the Budgeted Cost of Work Performed (BCWP), represents the planned costs of the work allocated to the completed activities (or portions of activities) throughout the project.
- **Actual Cost (AC)**, also known as the Actual Cost of Work Performed (ACWP), represents the costs actually incurred in accomplishing the work performed throughout the project. The real costs of the work are charged against the completed activities (or portions of activities).

At the heart of EVM is the Work Breakdown Structure (WBS). The WBS is the hierarchical structure of a project starting with high-level objectives, extending downward to sub-objectives, and finally to the lowest level of the structure—the individual work packages. The WBS includes the corresponding schedules for each sub-element of the project. It is a consistent, visual framework that displays and defines the products as elements that relate to the end product. The schedules for the WBS should be planned to the work package level and organized and linked to form a coherent, integrated overall project. ***Earned Value is based on assigning a value to the activity upon completion of the work***. Completion of the work must be determined by objective measures such as milestones or deliverables.

In managing projects, it is useful to track Earned Value along with planned and actual costs over time. The simplest progress reports comprise a basic tabulation of PV, EV, and AC and variances, which are measured in terms of resources such as man-hours or cost. **Any technical performance, schedule, or cost deviation from a specific project plan is called a "variance."** Typical sources of variances are: failure of a technical design to meet

performance specs; underestimating time to perform certain tasks or procure items; and underestimating cost of materials or services, for example using an outdated vendor quote.

The two types of variances are:

- **Cost Variance** (CV) – The difference between the amount of work completed (EV) and the amount that was actually expended (AC) for an element of work. A negative variance means that more money was spent for the work accomplished than was planned. Cost Variance is obtained by comparing actual cost with earned value: Cost Variance = (Earned Value – Actual Cost)

- **Schedule Variance** (SV) – The difference between the amount of work completed and the estimated budget (PV) for an element of work. Any difference is called the Schedule Variance. Schedule Variance is obtained by comparing earned value with planned value: Schedule Variance =(Earned Value – Planned Value)

- For GPRA reporting purposes (see Government Performance & Results Act Goals for more information on NSF's GPRA Goals), the CV and SV are then used to measure performance relative to the project plan.

This information is expressed as a percentage of the Planned Value.

- CV as a % of PV = (Earned Value – Actual Cost) / Planned Value

- SV as a % of PV =(Earned Value – Planned Value) / Planned Value

A "challenge" in using Earned Value is that you need to know the percentage of a task that has been completed. Projects with full Earned Value Management systems in place may use precise estimates to determine the percentage complete in accordance with methodologies approved by NSF. Projects that do not have full Earned Value Management systems implemented should determine the percentage by less precise means from project plans established for those tasks. These less precise means provide reduced visibility into project status and expose a project to greater risk*.

* At a minimum, for purposes of GPRA reporting only and not for project management, it is sufficient to label tasks that have not begun at 0% complete and task that have been completed at 100% complete. For incomplete tasks, the 50/50 rule is to be used: once begun, the task is assumed to be 50% complete and only when a task has been completed is the whole value earned until you have the capability to manage, track, and report more accurately the percentage of a task that has been completed to calculate Earned Value.

See also:

- Earned Value Management Scenarios
- Use the Worksheet
- Earned Value Management Summary

See also:

- An Introduction to the NSF Facility Performance Reporting System
- Operations Reports
- Construction/Upgrade Report

Earned Value Management Scenarios

The following scenarios demonstrate the basics of Earned Value. The calculations, described below, are necessary for GPRA reporting purposes:

- Cumulative planned value of the tasks in a work breakdown schedule (WBS) (or similar project schedule).

- Cumulative earned value of the work performed for the tasks in the WBS (or similar project schedule).
- Cumulative actual cost of the tasks in the WBS (or similar project schedule).

The following four scenarios, below, provide a running example of a development project beginning with reporting for Year 3 through Year 6. The purpose of the scenarios is to illustrate changes in project work performed as a function of time, schedule, and cost and how that impacts a project's ability to meet the FY 2003 GPRA goals.

Scenario 1: The development project is in the third year of production. The project is on target relative to cost and schedule.

Table 1 below describes the cumulative cost and schedule performance according to the project plan for Year 3. For this reporting period, the project planned to expend $20,000 (planned value), but actually expended $20,067 (actual cost). However, cost and schedule alone do not indicate the amount of work performed. As the cumulative total for earned value indicates, 100% of the planned value or $20,003 of work (earned value) was accomplished.

Table 1 Cost/Schedule Performance (cumulative) Year 3 Data

Task	Planned Value	Earned Value	Actual Cost	Schedule Variance	SV as % of PV	Cost Variance	CV as % of PV
Design	$3,500.00	$3,471.00	$3,495.00	-$29.00	-0.8%	-$24.00	-0.7%
Procurement	$4,280.00	$4,211.00	$3,790.00	-$69.00	1.6%	$421.00	9.8%
Construction	$7,520.00	$7,320.00	$8,100.00	-$200.00	-2.7%	-$780.00	-10.4%
Test	$2,700.00	$3,100.00	$2,600.00	$301.00	11.2%	$401.00	14.9%
Management	$2,000.00	$2,000.00	$2,082.00	$0.00	0.0%	-$82.00	-4.1%
Cumulative Total (Year 3)	$20,000.00	$20,003.00	$20,067.00	$3.00	0.0%	-$64.00	-0.3%

The SV and CV are $3 and -$64 respectively. As performance indicates, the SV as a % of PV is on schedule at 0.0% while the CV as a % of PV is slightly behind at 0.3%. Relative to the total project, you, as the project manager, recognize slight variances, but can also attribute the increase in actual cost to a price increase in supplies. You will monitor this more closely as the project continues. Overall, you are on schedule and on budget.

You have successfully met the GPRA Goal for Construction/Upgrade projects, because the negative schedule and cost variances as percentages of the planned value were kept to less than 10 percent of the approved project plan.

Figure 1 illustrates the cumulative total of PV, EV, and AC for Year 3.

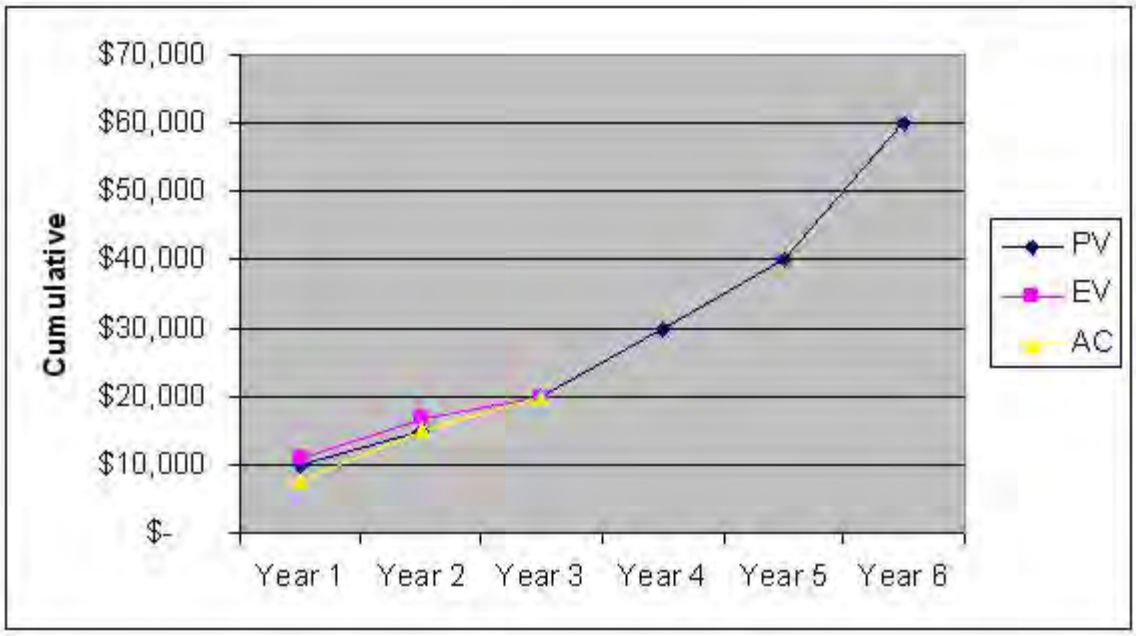

Figure 1 Cost/Schedule Performance (cumulative) Year 3 Graph.

Scenario 2: The development project is in the fourth year of production. The project is behind schedule while spending is on target.

Table 2 below identifies the cumulative cost and schedule performance by tasks in the project plan for Year 4. For this reporting period, the project planned to expend $30,000 (planned value), but actually expended $22,199 (actual cost). As the cumulative total for earned value indicates, 75% of the planned value or $22,440 of work (earned value) has been performed.

Table 2 Cost/Schedule Performance (cumulative) Year 4 Data

Task	Planned Value	Earned Value	Actual Cost	Schedule Variance	SV as % of PV	Cost Variance	CV as % of PV
Design	$4,000.00	$3,800.00	$3,700.00	-$200.00	-5.0%	$100.00	2.5%
Procurement	$5,900.00	$4,211.00	$4,200.00	-$1,689.00	-28.6%	$11.00	0.2%
Construction	$9,800.00	$8,320.00	$8,200.00	-$1,480.00	-15.1%	$120.00	1.2%
Test	$6,100.00	$3,001.00	$2,999.00	-$3,099.00	-50.8%	$2.00	0.0%
Management	$4,200.00	$3,108.00	$3,100.00	-$1,092.00	-26.0%	$8.00	0.2%
Cumulative Total (Year 4)	$30,000.00	$22,440.00	$22,199.00	-$7,560.00	-25.2%	$241.00	0.8%

In this scenario, the SV and CV are $-7,560 and $241 respectively. As performance indicates, the SV as a % of PV is behind schedule at 25.2% while the CV as a % of PV is on

budget at 0.8%. Since your last report for Year 3, there were a number of tasks to be accomplished. As the project manager, you expended (actual cost) almost as much as the amount of work that was performed (earned value) indicating that you spent what you thought the tasks would cost. However, the project did not accomplish as many of the tasks that were planned, thus, the project is behind schedule.
You have not successfully met the GPRA Goal for Construction/Upgrade projects, because the negative schedule variance, as a percentage of the planned value was not kept to less than 10 percent of the approved project plan.

Figure 2 illustrates the cumulative total of PV, EV, and AC for Year 4.

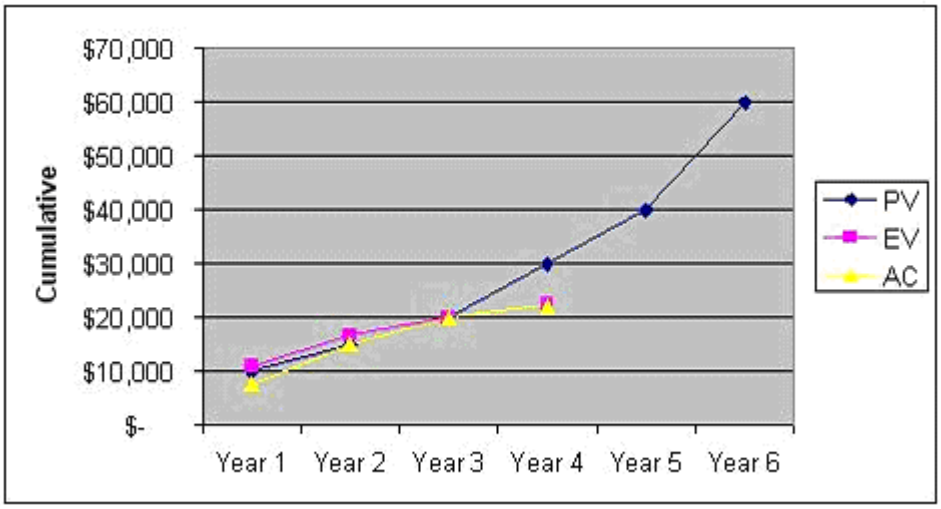

Figure 2 Cost/Schedule Performance (cumulative) Year 4 Graph.

Scenario 3: The development project is in the fifth year of production. The project is ahead of schedule and has a cost overrun.

Table 3 below identifies the cumulative cost and schedule performance by tasks in the project plan for Year 5. For this reporting period, the project planned to expend $40,000 (planned value), but actually expended $46,169 (actual cost). As the cumulative total for earned value indicates, 108% of the planned value or $43,200 of work (earned value) has been performed.

Table 3 Cost/Schedule Performance (cumulative) Year 5 Data

Task	Planned Value	Earned Value	Actual Cost	Schedule Variance	SV as % of PV	Cost Variance	CV as % of PV
Design	$5,000.00	$5,200.00	$5,500.00	$200.00	4.0%	-$300.00	-6.0%
Procurement	$7,900.00	$8,100.00	$9,100.00	$200.00	2.5%	-$1,000.00	-12.7%
Construction	$12,100.00	$15,000.00	$14,768.00	$2,900.00	24.0%	$232.00	1.9%
Test	$7,100.00	$7,500.00	$7,800.00	$400.00	5.6%	-$300.00	-4.2%
Management	$7,900.00	$7,400.00	$9,001.00	-$500.00	-6.3%	-$1,601.00	-20.3%
Cumulative	$40,000.00	$43,200.00	$46,169.00	$3,200.00	8.0%	-	-7.4%

Total (Year 5)						$2,969.00	

In this scenario, the SV and CV are $3,200 and -$2,969 respectively. As performance indicates, the SV as a % of PV is ahead of schedule at 8.0% while the CV as a % of PV is not on budget at 7.4%. As the project manager, you expended (actual cost) more than the value of the work performed (earned value), indicating that there is a cost overrun. However, the amount of work performed (earned value) for this period exceeded the project plan (planned value), indicating that the project is ahead of schedule.

You have successfully met the GPRA Goal for Construction/Upgrade projects because the negative schedule and cost variances as percentages of the planned value were kept to less than 10 percent of the approved project plan.

Scenario 4: The development project is in the sixth year of production. The project is behind schedule and has a cost overrun.

Table 4 below presents the cost and schedule performance according to the project plan for Year 6. For this reporting period, the project planned to expend $60,000 (planned value), but actually expended $62,640 (actual cost). As the cumulative total for earned value indicates, 89% of the planned value or $53,252 of work (earned value) has been performed.

In this scenario, the SV and CV are -$6,748 and -$9,388 respectively. As performance indicates, the SV as a % of PV is behind schedule at 11.3% while the CV as a % of PV is over budget at 15.7%. As the project manager, you expended (actual cost) more than the value of the work performed (earned value), indicating that there is a cost overrun. In addition, the amount of work performed (earned value) for this period was less than the project plan (planned value), indicating that the project is behind schedule.

Table 4 Cost/Schedule Performance (cumulative) Year 6 Data

Task	Planned Value	Earned Value	Actual Cost	Schedule Variance	SV as % of PV	Cost Variance	CV as % of PV
Design	$10,100.00	$9,800.00	$12,019.00	-$300.00	-3.0%	-$2,219.00	-22.0%
Procurement	$9,200.00	$7,000.00	$9,100.00	-$2,200.00	-23.9%	-$2,100.00	-22.8%
Construction	$16,100.00	$14,799.00	$14,768.00	-$1,301.00	-8.1%	$31.00	0.2%
Test	$9,933.00	$8,999.00	$9,999.00	-$934.00	-9.4%	$1,000.00	-10.1%
Management	$14,667.00	$12,654.00	$16,754.00	-$2,013.00	-13.7%	-$4,100.00	-28.0%
Cumulative Total (Year 6)	$60,000.00	$53,252.00	$62,640.00	-$6,748.00	-11.3%	-$9,388.00	-15.7%

In this scenario, the SV and CV are -$6,748 and -$9,388 respectively. As performance indicates, the SV as a % of PV is behind schedule at 11.3% while the CV as a % of PV is

over budget at 15.7%. As the project manager, you expended (actual cost) more than the value of the work performed (earned value), indicating that there is a cost overrun. In addition, the amount of work performed (earned value) for this period was less than the project plan (planned value), indicating that the project is behind schedule.

You have not successfully met the GPRA Goal for Construction/Upgrade projects, because the negative schedule and cost variances as percentages of the planned value were not kept to less than 10 percent of the approved project plan.

For your reference, an actual example from an NSF facility project is provided. In this example, you will view two Cost Schedule Status Reports as of November 1998 (Figure 3) and August 2001 (Figure 4).

Reporting Level	Cumulative To Date					At Completion		
Work Breakdown Structure	Budgeted Cost of Work Scheduled (BCWS)	Budgeted Cost of Work Performed (BCWP)	Actual Cost of Work Performed (ACWP)	Schedule Variance (2-1)	Cost Variance (2-3)	Budget-at-Completion (BAC)	Estimate-at-Completion (EAC)	Variance-at-Completion (6-7)
	(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)
1.1.1 Vacuum Equipment	43,529	43,173	41,923	-356	1,250	43,532	43,897	-365
1.1.2 Beam Tubes	46,423	47,137	46,251	714	886	47,203	47,231	-28
1.1.3 Beam Tube Enclosure	19,991	19,933	19,418	-58	515	19,991	19,487	504
1.1.4 Facility Design & Construction	51,943	52,390	51,244	447	1,146	52,460	52,488	-28
1.1.5 Beam Tube Bake	3,169	2,939	3,153	-230	-214	4,879	5,384	-505
1.2 Detector	50,990	41,227	34,890	-9,763	6,337	57,304	56,628	676
1.3 Research & Development	23,490	23,490	21,342	0	2,148	23,490	23,470	20
1.4 Project Office	29,323	29,323	27,563	0	1,760	34,310	34,440	-130
Subtotal	268,858	259,612	245,784	-9,246	13,828	283,169	283,025	144
Contingency						8,931	9,075	-
Total	268,858	259,612	245,784	-9,246	13,828	292,100	292,100	0

Figure 3 Cost Schedule Status Report (CSSR); Period End Date: November 1998.

Reporting Level	Cumulative To Date					At Completion		
Work Breakdown Structure	Budgeted Cost of Work Scheduled (BCWS)	Budgeted Cost of Work Performed (BCWP)	Actual Cost of Work Performed (ACWP)	Schedule Variance (2-1)	Cost Variance (2-3)	Budget-at-Completion (BAC)	Estimate-at-Completion (EAC)	Variance-at-Completion (6-7)
	(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)
1.1.1 Vacuum Equipment	43,970	43,970	44,047	0	-77	43,970	44,047	-77
1.1.2 Beam Tubes	46,967	46,967	47,004	0	-37	46,967	47,004	-37
1.1.3 Beam Tube Enclosure	19,338	19,338	19,338	0	0	19,338	19,338	0
1.1.4 Facility Design & Construction	55,288	54,856	54,856	-432	0	58,501	58,501	0
1.1.5 Beam Tube Bake	5,695	5,695	5,570	0	125	5,695	5,570	125
1.2 Detector	59,530	59,130	57,842	-400	1,288	59,530	59,359	171
1.3 Research & Development	22,089	22,089	22,151	0	-62	22,089	22,151	-62
1.4 Project Office	32,670	31,838	31,838	-832	0	35,509	35,450	59
Subtotal	285,547	283,883	282,646	-1,664	1,237	291,599	291,420	179
Contingency						501	680	-
Total	285,547	283,883	282,646	-1,664	1,237	292,100	292,100	0

Figure 4 Cost Schedule Status Report (CSSR); Period End Date: August 2016.

The terms of the two examples are defined as follows:

- **BCWS:** Budgeted Cost of Work Scheduled = Planned Value

- **BCWP:** Budgeted Cost of Work Performed = Earned Value
- **ACWP:** Actual Cost of Work Performed = Actual Cost
- **BAC:** Budgeted Actual Cost is the baseline budget plus any approved budget revisions for the total project.
- **EAC:** Estimated Actual Cost is the estimated budget to complete the total project, taking into account the most up to date information on tasks remaining to be carried out and current estimates of funding that will be needed to complete them.

These examples show how budget elements evolve during the course of the project, including expenditures to date, variances, and costs at completion. Notice, for example, that budget element 1.1.3 was in fact closed out in the period between the two reports. Notice, too, that the contingency drops as the project approaches completion. This is as it should be as fewer budget items remain to be completed.

A cumulative project cost and schedule are shown in Figure 5.

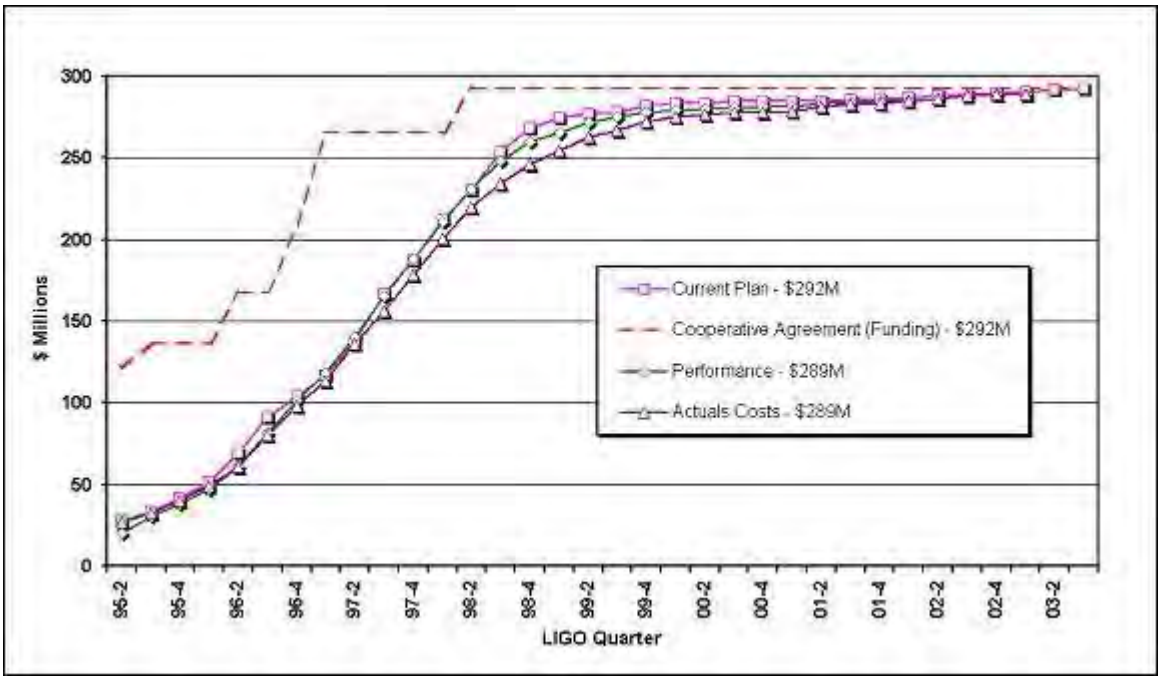

Figure 5 Cumulative Project Costs and Schedule.

Earned Value Management Worksheet

The Earned Value Management Worksheet (Figure 6) must be used to compute your planned value and earned value in the Construction/Upgrade Report. For more instructions on how to use the worksheet see Use the Worksheet.

Earned Value Management Worksheet

The Earned Value Management Worksheet is a tool to help Principal Investigators calculate the data needed to complete construction/upgrade reports. Beginning in Fiscal Year 2003, the National Science Foundation has decided to track the progress of Construction/Upgrade projects using Earned Value Management. This requires PIs to enter in the Planned Value for their projects in the beginning of the fiscal year, and then enter the Actual Cost and Earned Value for these projects at the end of the reporting year.

Currently, you are required to enter in a Planned Value through FY 2006.

When entering the Planned Value through FY 2006, please note that you are entering a dollar amount for the total planned value of the project through the end of the government fiscal year, September 30, 2006. This value is cumulative over the lifetime of the project; it must include the Planned Value for all tasks in this project prior to Sept. 30, 2006.

The following worksheet collects information on distinct tasks within the project and calculates the total planned value. Based on the total cost of the task and the percent complete of the task expected to be complete at the end of this fiscal year, the planned value for each task will be calculated. The cumulative Planned Value for the project can then be calculated and reported to NSF. This number must then be inserted into the construction/upgrade estimates report by clicking on the 'Insert' button.

Task Number	Task Name	Planned Total Cost of Task	Expected Percentage of Task to be Completed	Task Planned Value (Calculated)	Action
1	science system integrat	$5.6 M	65%	$3.64 M	Delete
2					Calculate

Note that the **Calculate** button **must** be clicked in order to completely add/update a task and calculate the total planned value(s).

To calculate the total Planned Value, Click [Here]

The total Planned Value for this project is **$ 3.64 M**

To enter this value into the report and close this worksheet, click this [Insert] button when finished.

Note: The "Insert" button must be clicked to submit this value.

[Download to Excel]

Figure 6 Earned Value Management Worksheet.

See also:

- Earned Value Management for a Construction/Upgrade Report
- Use the Worksheet
- Earned Value Management Summary

Use the Worksheet

You must use the Earned Value Management Worksheet (Figure 1) to compute your Planned Value, which will describe the cumulative Planned Value for the project through the end of the Federal fiscal year. To open the worksheet, select the Open Estimates Worksheet button.

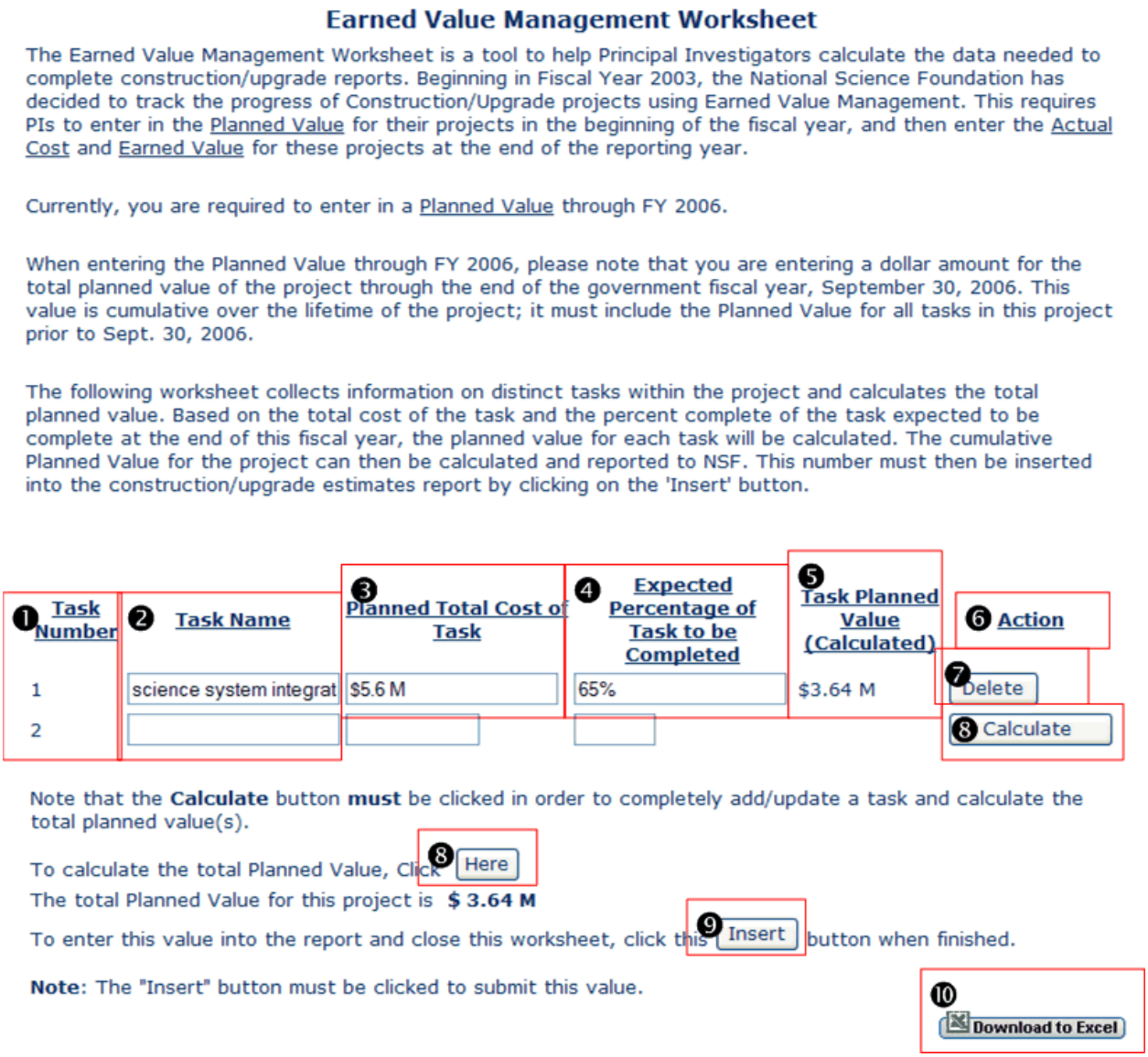

Figure 1 Earned Value Management Worksheet. The items encircled in red with little numbers are described in the paragraphs below.

The worksheet contains the following elements which are marked by number in Figure 1:

1. **Task Number**—An automatically generated sequence number for keeping track of the entered tasks in the EVM worksheet. **Note***: If the worksheet is reopened, the tasks will be sorted alphabetically.*
2. **Task Name**—A name for the task to keep the tasks straight.
3. **Planned Total Cost of Task**—The dollar amount (in millions) expected to completely finish this task.
4. **Expected Percentage of Task to be Completed**—The expected percentage of this task that will be completed by the end of the fiscal year.
5. **Task Planned Value (Calculated)**—The planned value represents the estimated value in (millions of) dollars of the work to be accomplished as scheduled for this task.
6. **Action**—The action to perform on the data.

7. **Delete**—This button will delete the information for that task.
8. **Calculate / Here**—These buttons will calculate (or recalculate) all tasks.
9. **Insert**—This button will close the window, and insert the calculated value into the *Planned Value* field of the Estimates Report. NOTE: If you select this button before you calculate new or edited tasks, all additions or changes will be lost.
10. **Download to Excel**—This button will open a download dialog box and let you download the data as an Excel spreadsheet. NOTE: Changing data in a downloaded spreadsheet will NOT change the *Planned Value* field of the Estimates Report.

The following steps show how to add tasks:

1. In the **Task Name** box, type a descriptive task name.
2. In the **Planned Total Cost of Task** box, type the total cost to complete the task.
3. In the **Expected Percentage of Task to be Completed** box, enter how much of the task will be completed at the end of the fiscal year.
4. In the **Select the Calculate button** box, the calculated Task Planned Value will be calculated and displayed. A new task row will also be displayed.
5. Repeat each of the above steps to create as many tasks as required.
   - To edit a task, modify the data and select either the **Calculate** or the **Here** button.
   - To delete a task, select the **Delete** button for the appropriate task.

Once all tasks have been added and calculated, select the **Insert** button. The window will be closed and the calculated value will be inserted into the *Planned Value* field of the Estimates Report.

See also:

- Earned Value Management for a Construction/Upgrade Report
- Earned Value Management Scenarios
- Earned Value Management Summary

Earned Value Management Summary

Earned Value Management is a management technique that relates technical performance to associated cost and schedule, measures actual work progress, and states the value of work completed in dollars. In the 1960s, the Department of Defense (DoD) established 35 Cost/Schedule Control Systems Criteria (C/SCCS) in response to the high risks to the Federal Government as a result of the contracting environment. In the mid-1990s, DoD rewrote the C/SCCS to accommodate project management in the private sector, updated the criteria from 35 to 32, and renamed it Earned Value Management.

Since then, many public and private sector projects have used Earned Value Management. Today, not only do federal agencies use earned value indices, private industry project managers have incorporated Earned Value in quarterly and yearly reporting. Earned Value focuses on the accurate measurement of project performance against a detailed plan to allow for the accurate prediction of final costs and schedule for a given project.

Overall, Earned Value Management is not difficult to implement, and in fact, many project managers use some form of earned value in their daily routines and are not aware that they are employing the concept. For example, most construction-type projects will have someone responsible for taking the time to verify work that was actually accomplished on invoices being processed to pay the supplier. This is a simple form of Earned Value. More importantly, Earned Value Management provides project managers with a tool to take the necessary corrective action when a project is spending more money than the work it is accomplishing. In conclusion, Earned Value Management emphasizes disciplined project

planning, integrates performance, cost and schedule elements, provides cost and schedule metrics, enables trend analysis to predict performance, and informs decision-makers.

See also:

- Earned Value Management for a Construction/Upgrade Report
- Earned Value Management Scenarios
- Use the Worksheet

PI Functions

Principal Investigator Functions Introduction

Print the contents of the PI Functions book.

As a Principal Investigator (PI), you are the individual designated by the grantee and approved by NSF who is responsible for a project's scientific or technical direction.

You are designated as a PI with NSF when the Sponsored Project Office (SPO) representative of your organization adds you as a FastLane user and marks the check mark box indicating that you are a PI.

As a PI, you work in the Proposals, Awards, and Status module (Figure 1) on four types of activities:

- Managing participation on a project, before and after award
- Preparing, checking, and updating proposals
- Communicating with NSF on the project post-award
- Updating NSF on your PI information and status

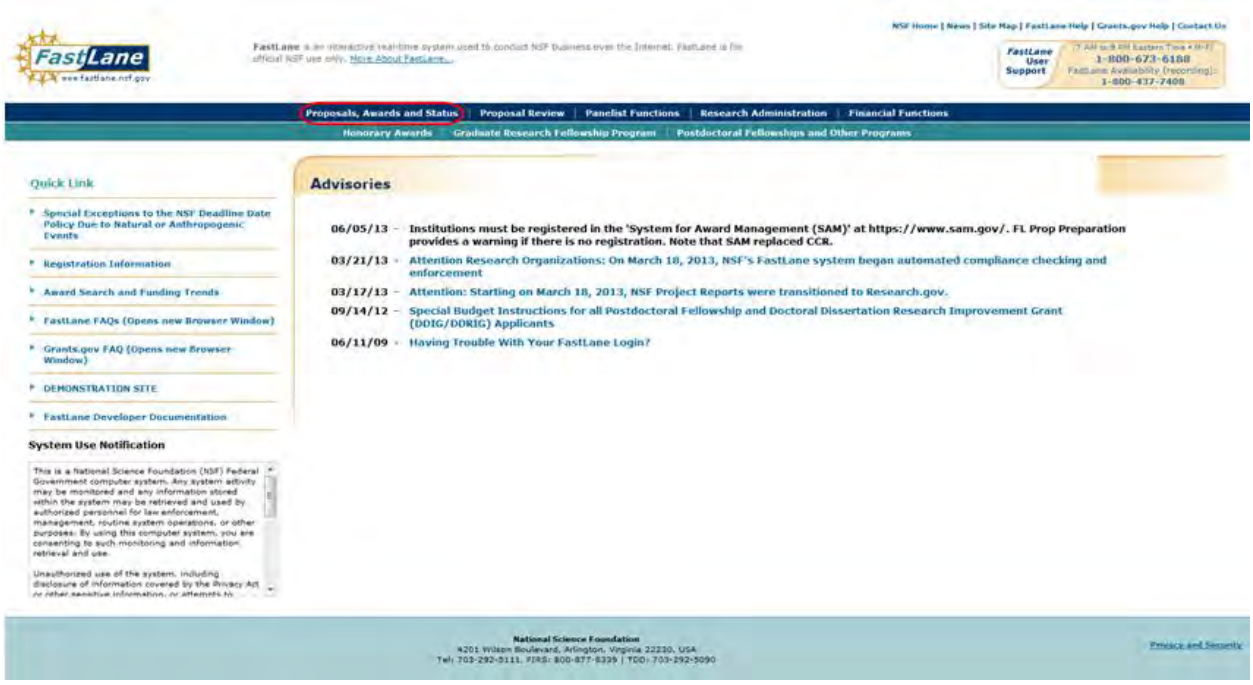

Figure 1 FastLane Home Page screen. The Proposals, Awards, and Status link is circled. PIs, Co-PIs, and Other Authorized Users work in this module.

Principal Investigator Functions Introduction

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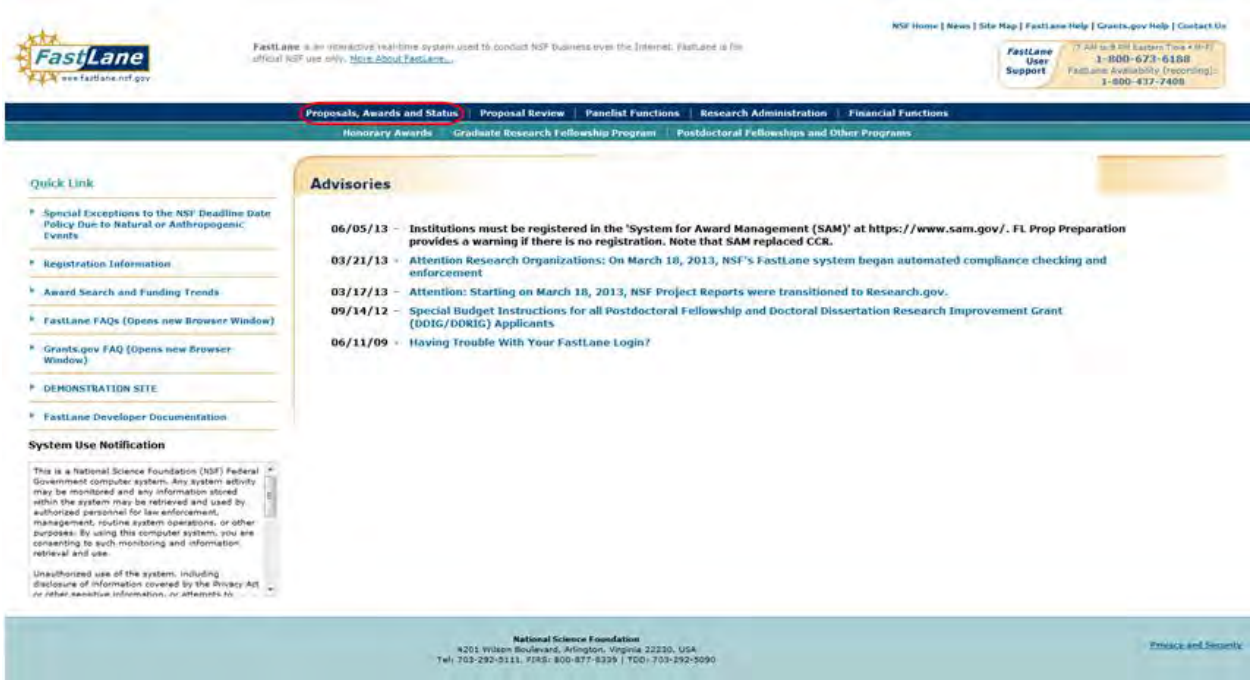

Figure 1 FastLane Home Page screen. The Proposals, Awards, and Status link is circled. PIs, Co-PIs, and Other Authorized Users work in this module.

Prepare and Update Proposals

In the Proposals, Awards, and Status module, you prepare a proposal and communicate with NSF about it. In pre-award work associated with a proposal, the PI can do the following:

- Create a Letter of Intent
- Prepare a proposal
- Allow or remove SPO/AOR access to a proposal
- Initiate a Proposal File update for a submitted proposal
- Check the status of a proposal
- View the *ad hoc* and/or panel reviews of a proposal
- Initiate a revised submitted proposal budget

Communicate with NSF on an Awarded Project

Once NSF has granted an award to your project, you can report on your project and communicate with NSF. In post-award work associated with a project, you can do the following:

- Prepare a notification or request
- Prepare a Supplemental Funding Request
- Check the status of continuation funding
- View and print the award documents, including viewing a cooperative agreement

Manage Participation on a Project

Manage Participation on a Project Introduction

The PI for a project manages the participation of others on a proposal or a project both before and after award.

For Proposed Projects

The PI coordinates the participation of Co-PIs, Non-Co-PI Senior Personnel, and Other Authorized Users (OAUs) on a project. The PI can do the following to manage participation on a proposal:

- Add a Co-PI to a proposal or remove a Co-PI from a proposal
- Create a proposal PIN to enable an OAU to work on the proposal
- Add or delete non-Co-PI Senior Personnel as part of any of the following:
  - Letter of Intent
  - Proposal
  - Revised Submitted Budget
  - Proposal File Update

The PI is also responsible for enabling a Senior Person to work on a proposal. To enable a Senior Person to work on a proposal, communicate to the individual the following information:

- Proposal PIN
- Proposal Number

For Awarded Projects

The PI coordinates the participation of Co-PIs, Non-Co-PI Senior Personnel, and OAUs on a project that NSF has awarded. The PI can do the following to manage participation in a project:

- Add or change Co-PIs on a project
- Withdraw a Co-PI from a project
- Assign or change the award PIN to enable an OAU to work on a project report
- Add or delete non-Co-PI Senior Personnel as part of any of the following:
  - Addition of Subaward Request
  - PI Transfer Request
  - Supplemental Funding Request

To enable a Senior Person to work on a project report, communicate to the individual the following:

- Award PIN
- Award Number

Manage Participation on a Project Introduction

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  - Letter of Intent
  - Proposal
  - Revised Submitted Budget
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- Add or delete non-Co-PI Senior Personnel as part of any of the following:
  - Addition of Subaward Request
  - PI Transfer Request
  - Supplemental Funding Request

To enable a Senior Person to work on a project report, communicate to the individual the following:

- Award PIN
- Award Number

For Proposed Projects

Manage Participation for a Proposed Project

The PI coordinates the participation of Co-PIs, Non-Co-PI Senior Personnel, and Other Authorized Users (OAUs) on a project. The PI can do the following to manage participation on a proposal:

- Add a Co-PI to a proposal or remove a Co-PI from a proposal
- Create a proposal PIN to enable an OAU to work on the proposal
- Add or delete non-Co-PI Senior Personnel as part of a:
  - A Letter of Intent
  - A proposal
  - A Revised Submitted Budget

- A Proposal File Update

The PI is also responsible for enabling a Senior Person to work on a proposal. To enable a Senior Person to work on a proposal, communicate to the individual the following information:

- Proposal PIN
- Proposal Number

Manage Participation for a Proposed Project

The PI coordinates the participation of Co-PIs, Non-Co-PI Senior Personnel, and Other Authorized Users (OAUs) on a project. The PI can do the following to manage participation on a proposal:

- Add a Co-PI to a proposal or remove a Co-PI from a proposal
- Create a proposal PIN to enable an OAU to work on the proposal
- Add or delete non-Co-PI Senior Personnel as part of a:
  - A Letter of Intent
  - A proposal
  - A Revised Submitted Budget
  - A Proposal File Update

The PI is also responsible for enabling a Senior Person to work on a proposal. To enable a Senior Person to work on a proposal, communicate to the individual the following information:

- Proposal PIN
- Proposal Number

Add a Co-PI to a Proposal

Before adding a Co-PI to a proposal, the individual must be registered with NSF as a PI.

You may only add four Co-PIs to a proposal. You may add other individuals to the project as Non-Co-PI Senior Personnel (see Add or Delete Senior Personnel).

Use the General Log In procedure to log in to the system.

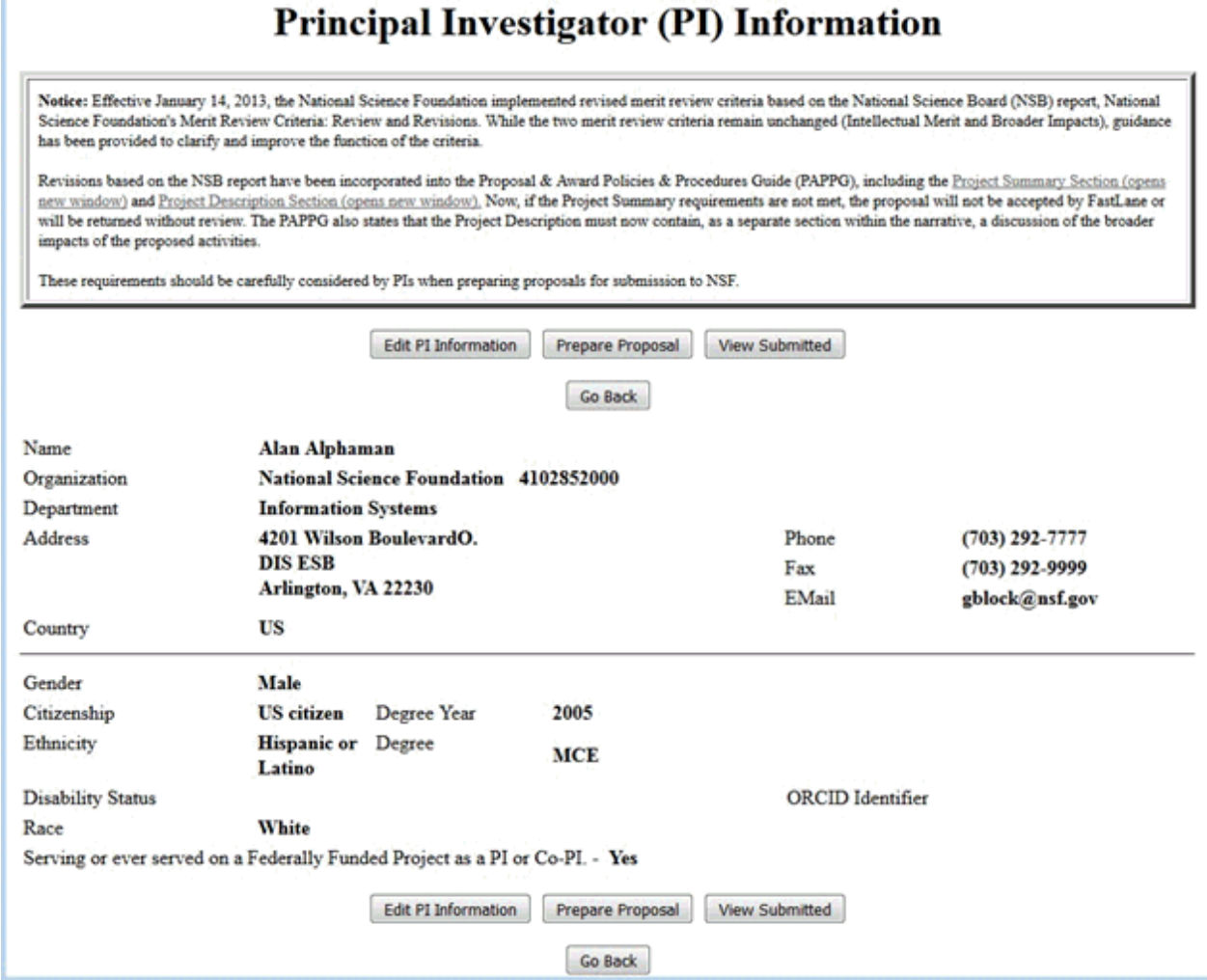
1. The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management** screen displays (Figure 1).

Figure 1 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management screen. The Proposal Functions link is circled.

2. Click **Proposal Functions** (Figure 1). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Proposal Functions** screen displays (Figure 2).

Figure 2 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Proposal Functions screen. The Proposal Preparation link is circled.

3. Click **Proposal Preparation** (Figure 2). The **Principal Investigator (PI) Information** screen displays (Figure 3).



Principal Investigator (PI) Information

Notice: Effective January 14, 2013, the National Science Foundation implemented revised merit review criteria based on the National Science Board (NSB) report, National Science Foundation's Merit Review Criteria: Review and Revisions. While the two merit review criteria remain unchanged (Intellectual Merit and Broader Impacts), guidance has been provided to clarify and improve the function of the criteria.

Revisions based on the NSB report have been incorporated into the Proposal & Award Policies & Procedures Guide (PAPPG), including the Project Summary Section (opens new window) and Project Description Section (opens new window). Now, if the Project Summary requirements are not met, the proposal will not be accepted by FastLane or will be returned without review. The PAPPG also states that the Project Description must now contain, as a separate section within the narrative, a discussion of the broader impacts of the proposed activities.

These requirements should be carefully considered by PIs when preparing proposals for submission to NSF.

Edit PI Information | Prepare Proposal | View Submitted

Go Back

Name	**Alan Alphaman**		
Organization	**National Science Foundation 4102852000**		
Department	**Information Systems**		
Address	**4201 Wilson BoulevardO.** **DIS ESB** **Arlington, VA 22230**	Phone Fax EMail	**(703) 292-7777** **(703) 292-9999** **gblock@nsf.gov**
Country	**US**		

Gender	**Male**		
Citizenship	**US citizen**	Degree Year	**2005**
Ethnicity	**Hispanic or Latino**	Degree	**MCE**
Disability Status		ORCID Identifier	
Race	**White**		

Serving or ever served on a Federally Funded Project as a PI or Co-PI. - **Yes**

Edit PI Information | Prepare Proposal | View Submitted

Go Back

Figure 3 Principal Investigator (PI) Information screen. The Prepare Proposal button is circled.

4. Click the **Prepare Proposal** button (Figure 3). The **Proposal Actions** screen displays (Figure 4).

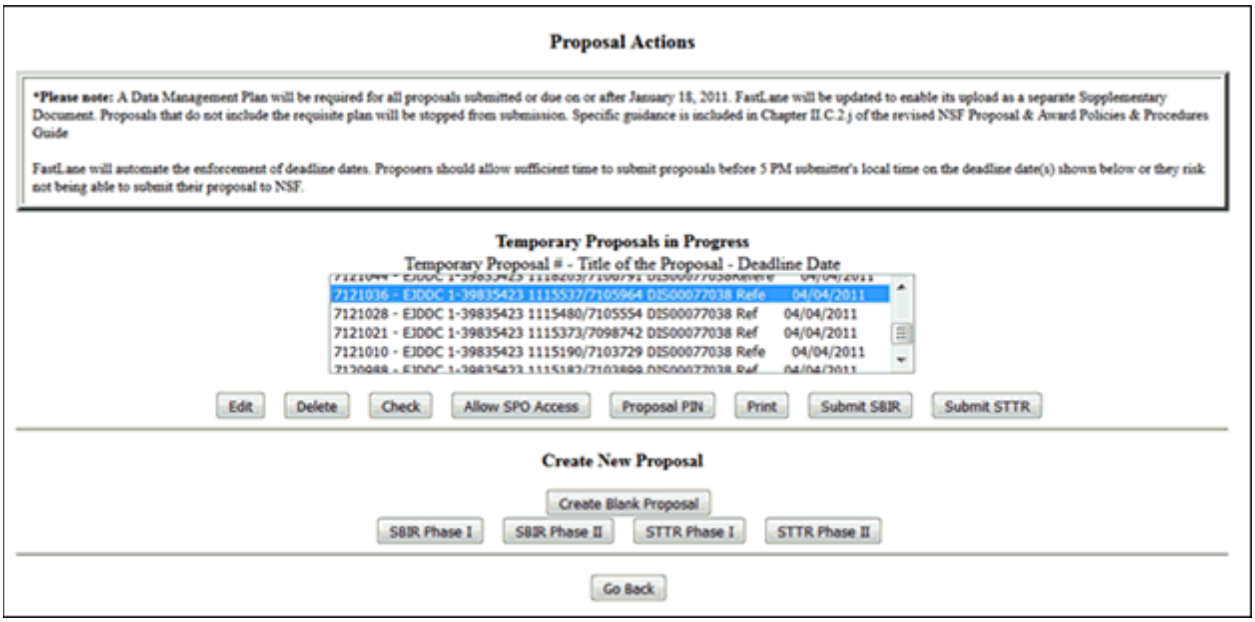


Figure 4 Proposal Actions screen. The Edit button is circled.

5. Highlight the number of the proposal (Figure 4) you want to add a Co-PI to.
6. Click the **Edit** button (Figure 4). The **Form Preparation** screen displays (Figure 5).

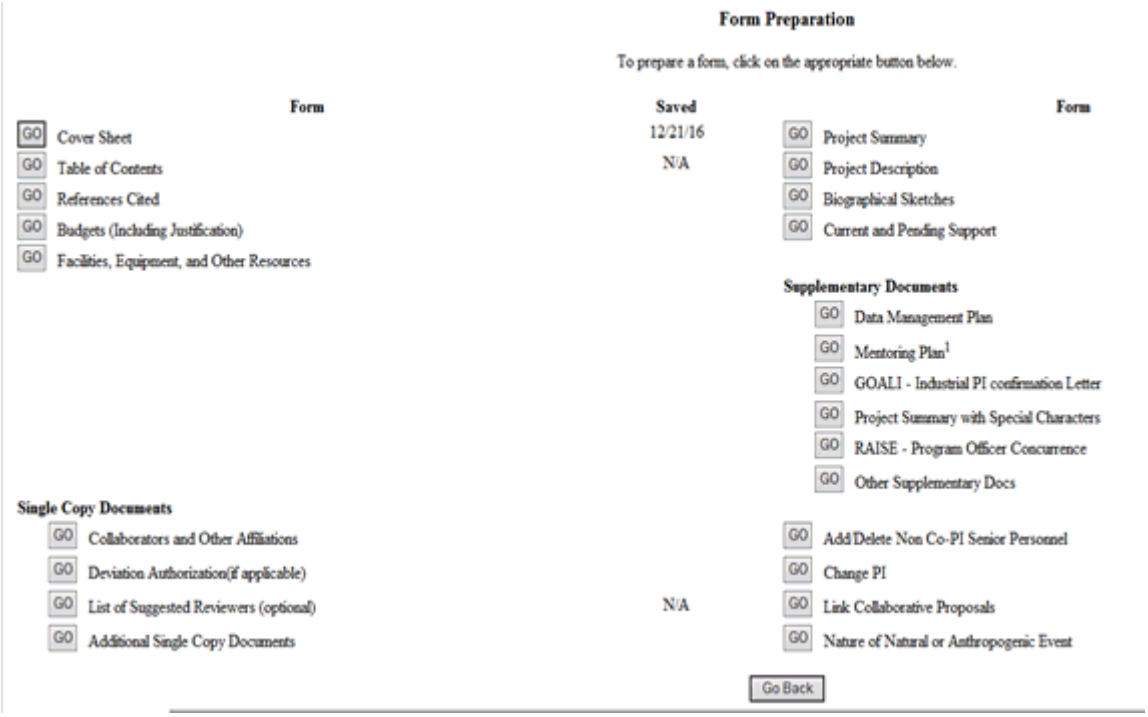
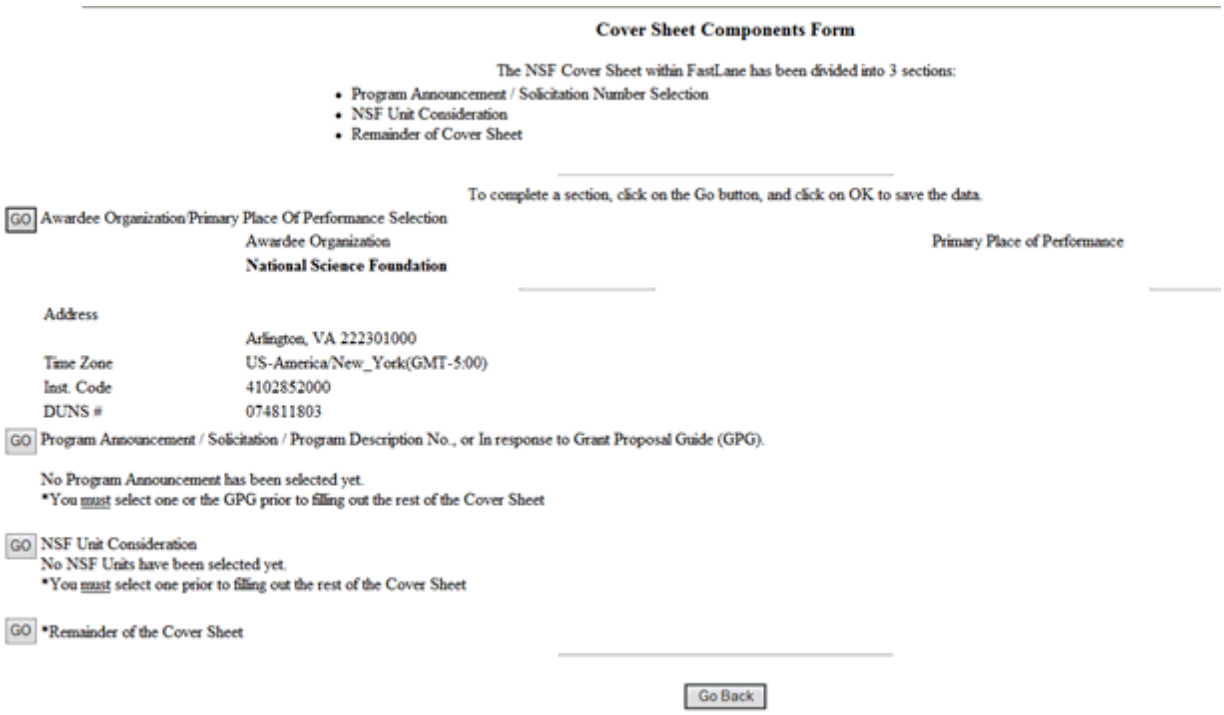


Figure 5 Form Preparation screen.

7. Click the **Go** button for Cover Sheet (Figure 5). The **Cover Sheet Components Form** screen displays (Figure 6).



Cover Sheet Components Form

The NSF Cover Sheet within FastLane has been divided into 3 sections:

- Program Announcement / Solicitation Number Selection
- NSF Unit Consideration
- Remainder of Cover Sheet

To complete a section, click on the Go button, and click on OK to save the data.

GO Awardee Organization/Primary Place Of Performance Selection

Awardee Organization | Primary Place of Performance

National Science Foundation

Address

Arlington, VA 222301000

Time Zone US-America/New_York(GMT-5:00)

Inst. Code 4102852000

DUNS # 074811803

GO Program Announcement / Solicitation / Program Description No., or In response to Grant Proposal Guide (GPG).

No Program Announcement has been selected yet.
*You must select one or the GPG prior to filling out the rest of the Cover Sheet

GO NSF Unit Consideration
No NSF Units have been selected yet.
*You must select one prior to filling out the rest of the Cover Sheet

GO *Remainder of the Cover Sheet

Go Back

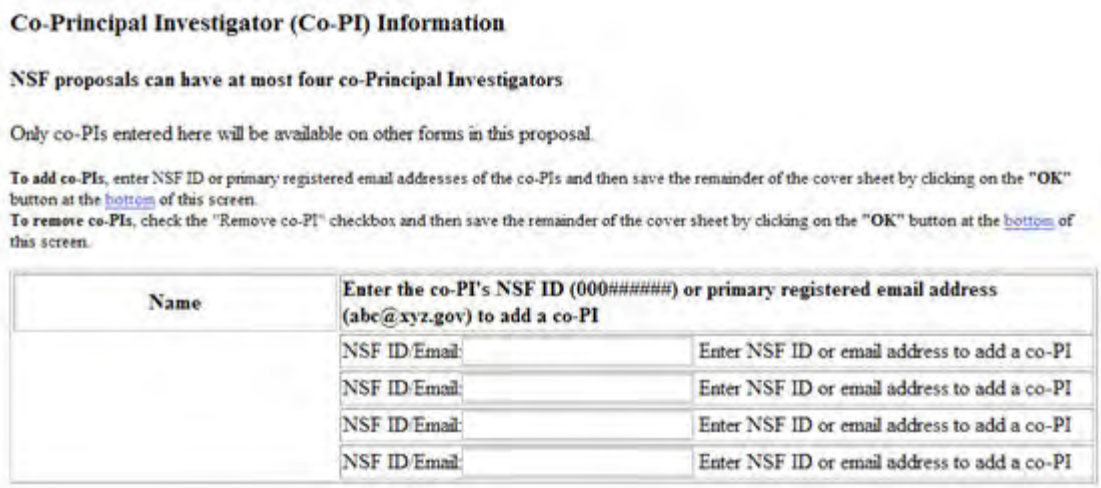
Figure 6 Cover Sheet Components Form screen.

8. Click the **Go** button for Remainder of the Cover Sheet (Figure 6). The **Remainder of the Cover Sheet** screen displays (Figure 7).

Proposal Title | Budget and Duration | Announcement and Consideration | PI Information
Co-PI Information | Previous NSF Awards | Other Federal Agencies | Awardee Organization
Primary Place of Performance | Other Information | Certification | Authorized Representative
Top of Page | Bottom of Page

Figure 7 Upper portion of the Remainder of the Cover Sheet screen. The Co-PI Information link is circled.

9. Click **Co-PI Information** at the top of the screen (Figure 7). The **Co-Principal Investigator (Co-PI) Information** section displays (Figure 8).



Co-Principal Investigator (Co-PI) Information

NSF proposals can have at most four co-Principal Investigators

Only co-PIs entered here will be available on other forms in this proposal.

To add co-PIs, enter NSF ID or primary registered email addresses of the co-PIs and then save the remainder of the cover sheet by clicking on the **"OK"** button at the bottom of this screen.
To remove co-PIs, check the "Remove co-PI" checkbox and then save the remainder of the cover sheet by clicking on the **"OK"** button at the bottom of this screen.

Name	Enter the co-PI's NSF ID (000######) or primary registered email address (abc@xyz.gov) to add a co-PI		
	NSF ID/Email:		Enter NSF ID or email address to add a co-PI
	NSF ID/Email:		Enter NSF ID or email address to add a co-PI
	NSF ID/Email:		Enter NSF ID or email address to add a co-PI
	NSF ID/Email:		Enter NSF ID or email address to add a co-PI

Figure 8 Co-Principal Investigator (Co-PI) Information section of the Remainder of the Cover Sheet screen.

10. In the **NSF ID/Email** box (Figure 8), type the NSF ID or email address of the Co-PI you want to add to the proposal. (Repeat to add up to four Co-PIs to a proposal.)
11. Click the **OK** button at the bottom of the screen (Figure 9). A screen displays (Figure 10) with confirmation that the Cover Sheet has been saved, including the addition of the Co-PI to the proposal.

Figure 9 Lower portion of the Remainder of the Cover Sheet screen. The OK button is circled.

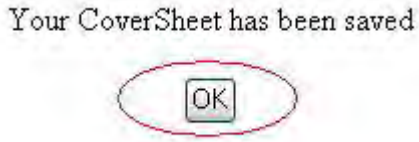


Figure 10 Screen with confirmation that the information on the Cover Sheet is saved. This includes the addition of the Co-PI to the proposal.

12. Click the **OK** button (Figure 10). The **Form Preparation** screen displays (Figure 5).

Add a Non-Co-PI Senior Person to a Proposal

You may add as many non-Co-PI Senior Personnel as you require to a proposal.

1. On the **FastLane Home Page** screen (Figure 1), click **Proposals, Awards, and Status**. The **Proposals, Awards, and Status** screen displays (Figure 2).

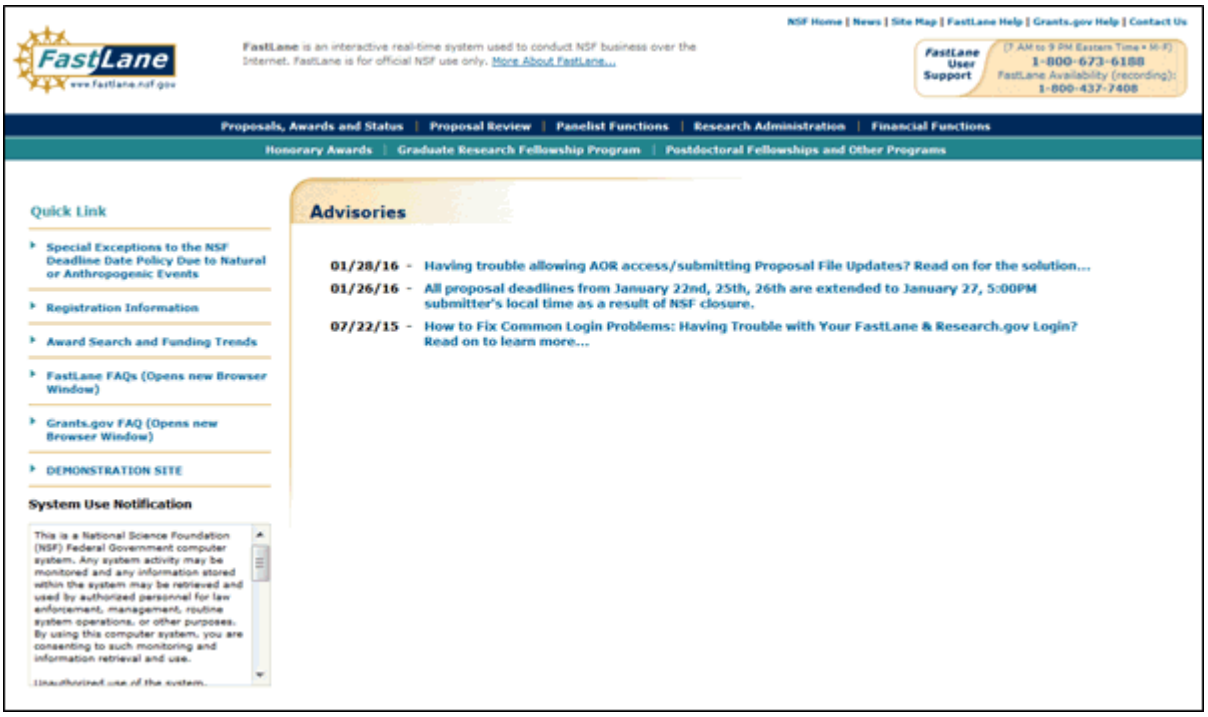


Figure 1 FastLane Home Page screen. The Proposals, Awards, and Status link is circled.

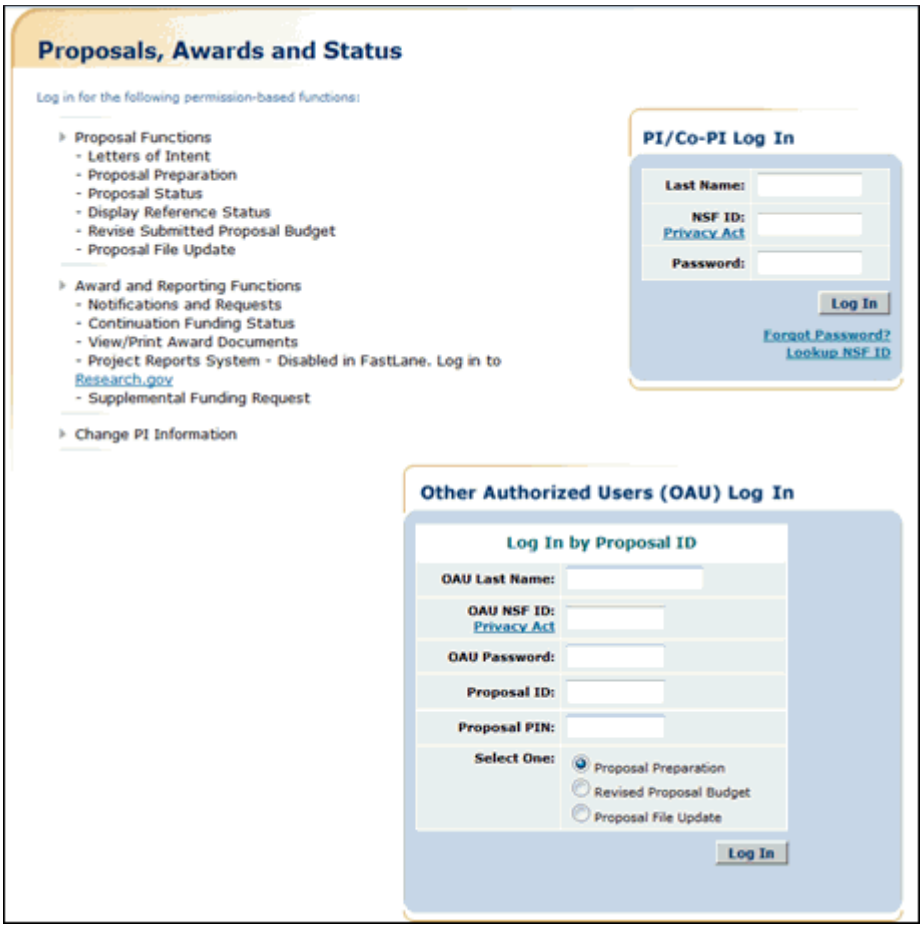


Figure 2 Proposals, Awards, and Status screen. The PI/Co-PI Log In area is circled.

2. In the **PI/Co-PI** section (Figure 1), type the following:
   - Your last name
   - Your National Science Foundation Identification (NSF ID) number
   - Your password
3. Click the **Log In** button (Figure 2). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management** screen displays (Figure 3).

Figure 3 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management screen. The Proposal Functions link is circled.

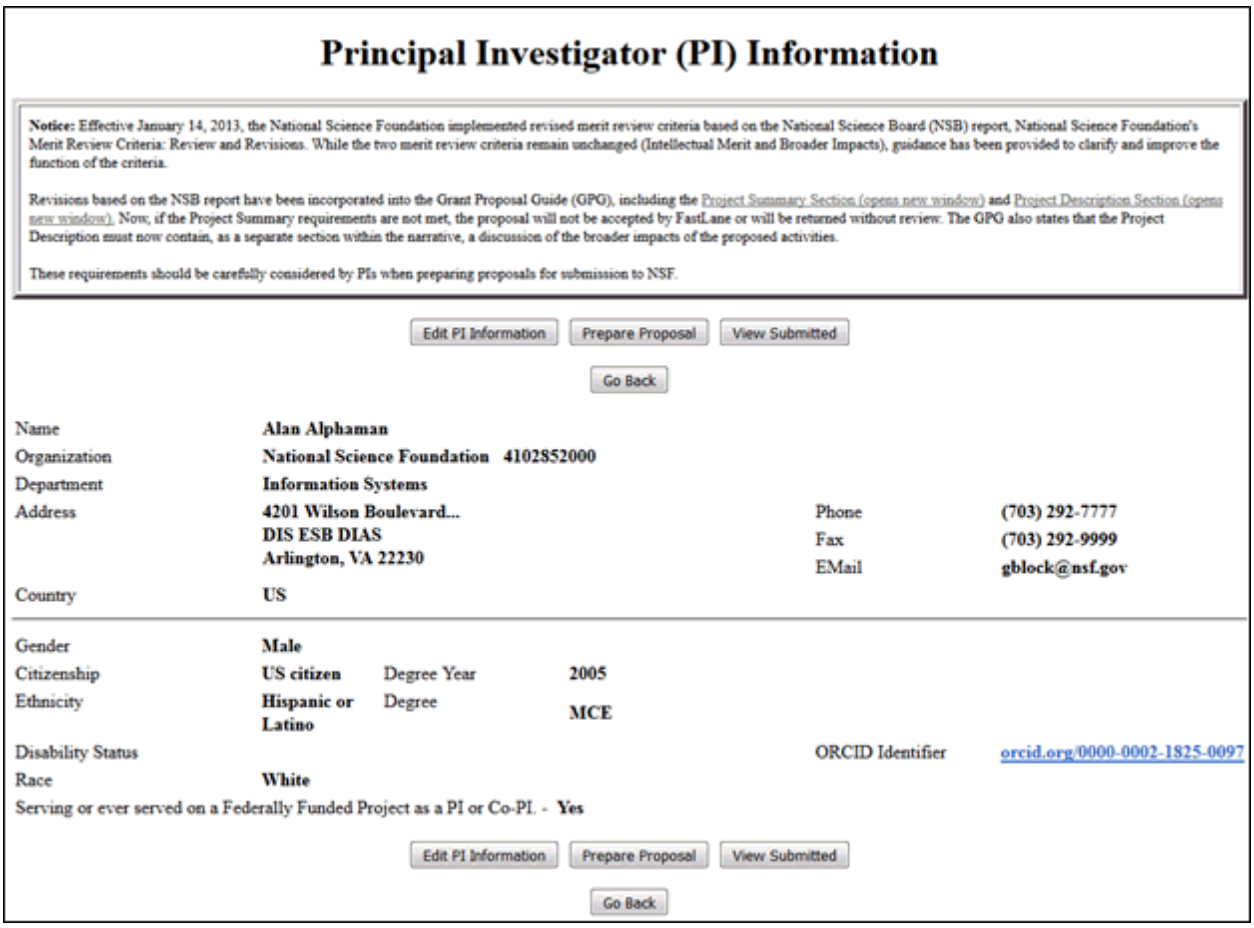
4. Click **Proposal Functions** (Figure 3). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Proposal Functions** screen displays (Figure 4).

Figure 4 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Proposal Functions screen. The Proposal Preparation link is circled.

5. Click **Proposal Preparation** (Figure 4). The **Principal Investigator (PI) Information** screen displays (Figure 5).

Figure 5 Principal Investigator (PI) Information screen. The Prepare Proposal button is circled.

6. Click the **Prepare Proposal** button (Figure 5). The **Proposal Actions** screen displays (Figure 6).



Principal Investigator (PI) Information

Notice: Effective January 14, 2013, the National Science Foundation implemented revised merit review criteria based on the National Science Board (NSB) report, National Science Foundation's Merit Review Criteria: Review and Revisions. While the two merit review criteria remain unchanged (Intellectual Merit and Broader Impacts), guidance has been provided to clarify and improve the function of the criteria.

Revisions based on the NSB report have been incorporated into the Grant Proposal Guide (GPG), including the Project Summary Section (opens new window) and Project Description Section (opens new window). Now, if the Project Summary requirements are not met, the proposal will not be accepted by FastLane or will be returned without review. The GPG also states that the Project Description must now contain, as a separate section within the narrative, a discussion of the broader impacts of the proposed activities.

These requirements should be carefully considered by PIs when preparing proposals for submission to NSF.

Edit PI Information | Prepare Proposal | View Submitted

Go Back

Name	**Alan Alphaman**		
Organization	**National Science Foundation 4102852000**		
Department	**Information Systems**		
Address	**4201 Wilson Boulevard...** **DIS ESB DIAS** **Arlington, VA 22230**	Phone Fax EMail	**(703) 292-7777** **(703) 292-9999** **gblock@nsf.gov**
Country	**US**		

Gender	**Male**		
Citizenship	**US citizen**	Degree Year	**2005**
Ethnicity	**Hispanic or Latino**	Degree	**MCE**
Disability Status		ORCID Identifier	orcid.org/0000-0002-1825-0097
Race	**White**		

Serving or ever served on a Federally Funded Project as a PI or Co-PI. - **Yes**

Edit PI Information | Prepare Proposal | View Submitted

Go Back

Figure 6 Proposal Actions screen. The Edit button is circled.

7. Highlight the number of the proposal (Figure 6) that you want to add a Non-CoPI Senior Person to.
8. Click the **Edit** button (Figure 6). The **Form Preparation** screen displays (Figure 7).

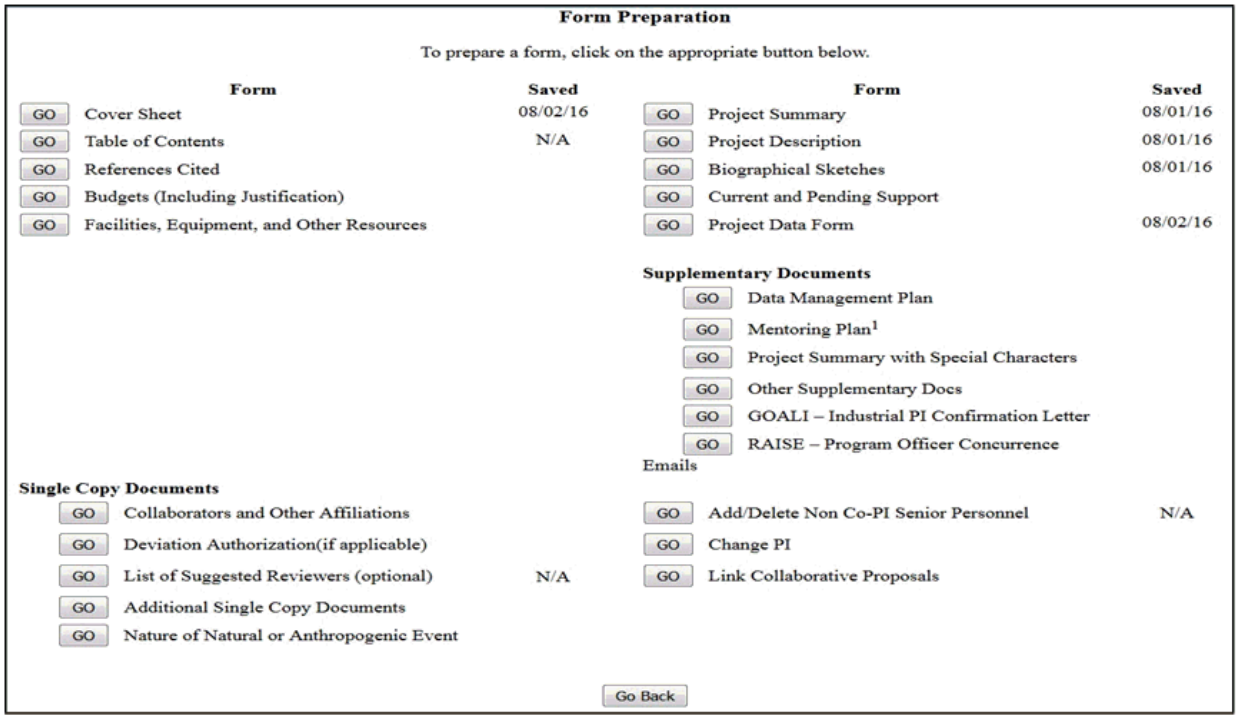


Figure 7 Form Preparation screen. The Go button for Add/Delete Non-Co-PI Senior Personnel is circled.

9. Click the **Go** button (Figure 7) for Add/Delete Non-Co-PI Senior Personnel. The **Add/Delete Non-Co-Principal Investigator (Co-PI) Senior Personnel Assigned to Proposal** screen displays (Figure 8).

Figure 8 Add/Delete Non-Co-Principal Investigator (Co-PI) Senior Personnel Assigned to Proposal screen. The Add Non-Co-PI Senior Person to Proposal button is circled.

10. In the appropriate boxes, type the individual's first and last name and middle initial (Figure 8).
11. Click the **Add Non-Co-PI Senior Person to Proposal** button (Figure 8). The **Add/Delete Non-Co-Principal Investigator (Co-PI) Senior Personnel Assigned to Proposal** screen displays (Figure 9) with the individual listed as a Senior Person. The individual is also now listed on the **Budget Personnel** screen (Figure 10) as a Senior Person for whom funds can be allocated.

Figure 9 Add/Delete Non-Co-Principal Investigator (Co-PI) Senior Personnel Assigned to Proposal screen. The newly added Senior Person's name now appears in the list of Senior Personnel.

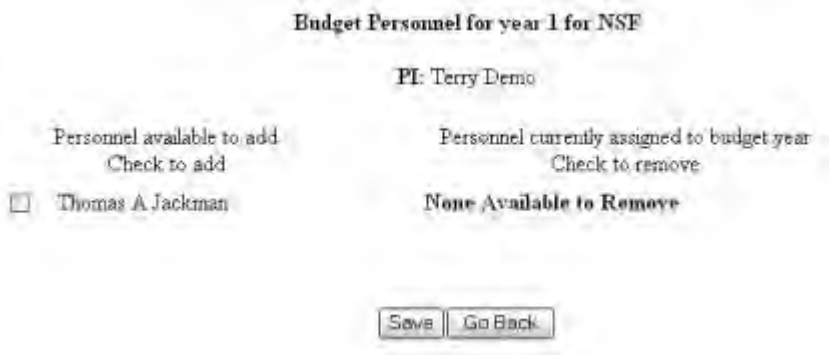


Figure 10 Budget Personnel screen. The name of the newly added Senior Person is listed for addition if necessary as a person for whom funds are to be allocated.

Remove a Co-PI from a Proposal

NSF permits only four Co-PIs per proposal.

1. On the **FastLane Home Page** screen (Figure 1), click **Proposals, Awards, and Status**. The **Proposals, Awards, and Status** screen displays (Figure 2).

Figure 1 FastLane Home Page screen. The Proposals, Awards, and Status link is circled.

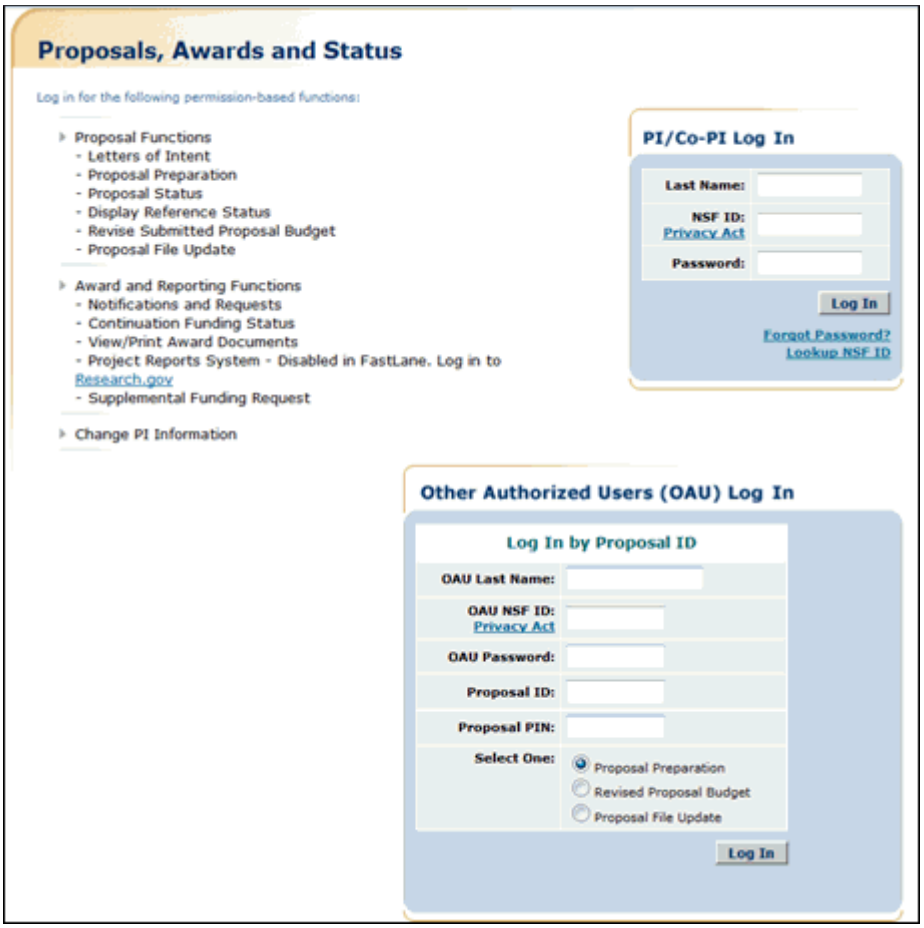


Figure 2 Proposals, Awards, and Status screen. The PI/Co-PI Log In area is circled.

2. In the **PI/Co-PI** section (Figure 1), type the following:
   - Your last name
   - Your National Science Foundation Identification (NSF ID) number
   - Your password
3. Click the **Log In** button (Figure 2). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management** screen displays (Figure 3).

Figure 3 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management screen. The Proposal Functions link is circled.

4. Click **Proposal Functions** (Figure 3). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Proposal Functions** screen displays (Figure 4).

Figure 4 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Proposal Functions screen. The Proposal Preparation link is circled.

5. Click **Proposal Preparation** (Figure 4). The **Principal Investigator (PI) Information** screen displays (Figure 5).

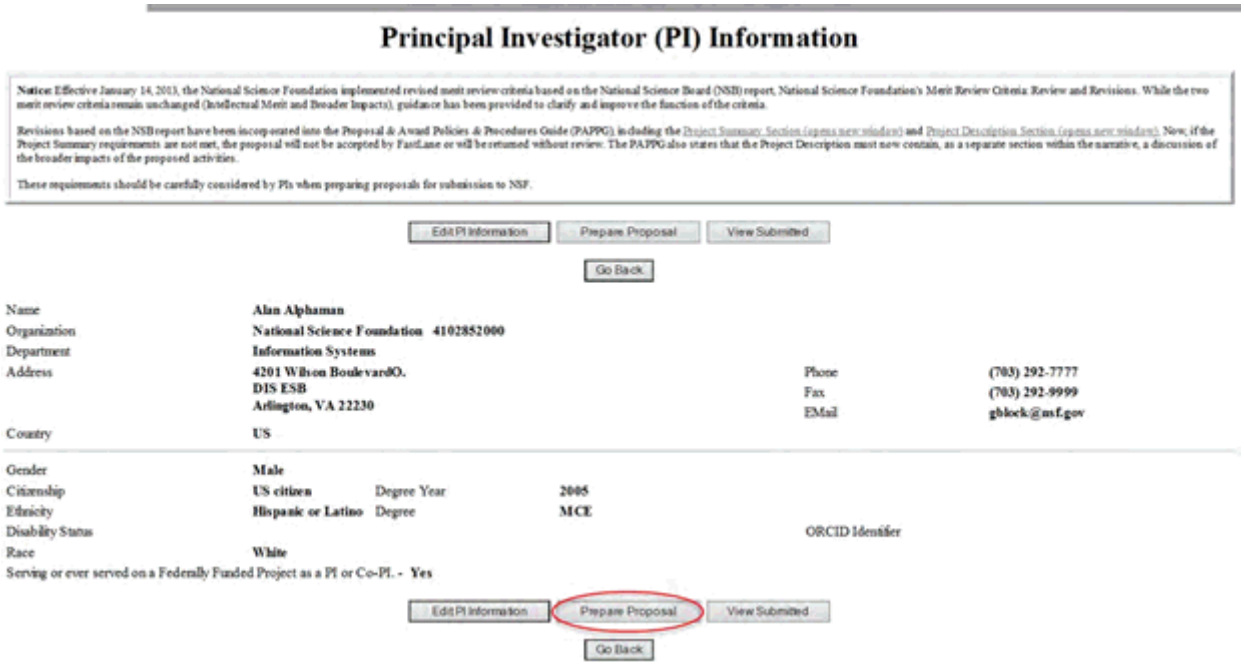


Figure 5 Principal Investigator (PI) Information screen. The Prepare Proposal button is circled.

6. Click the **Prepare Proposal** button (Figure 5). The **Proposal Actions** screen displays (Figure 6).

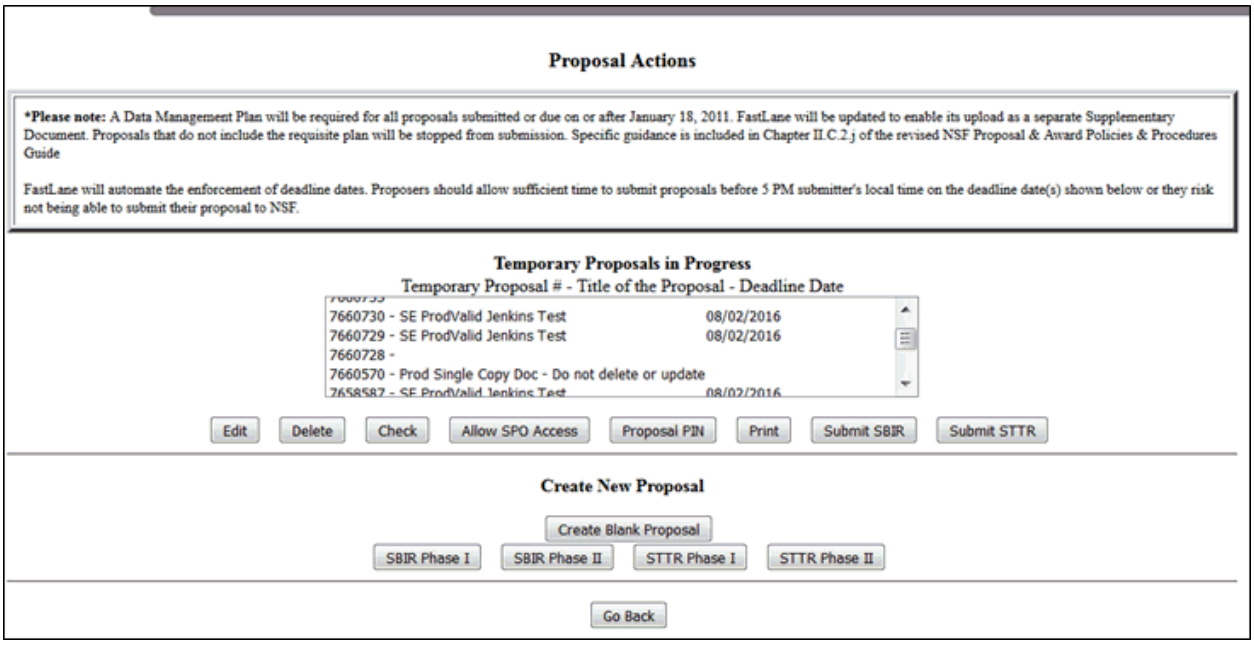


Figure 6 Proposal Actions screen. The Edit button is circled.

7. Highlight the number of the proposal (Figure 6) that you want to remove a Co-PI from.

8. Click the **Edit** button (Figure 6). The **Form Preparation** screen displays (Figure 7).

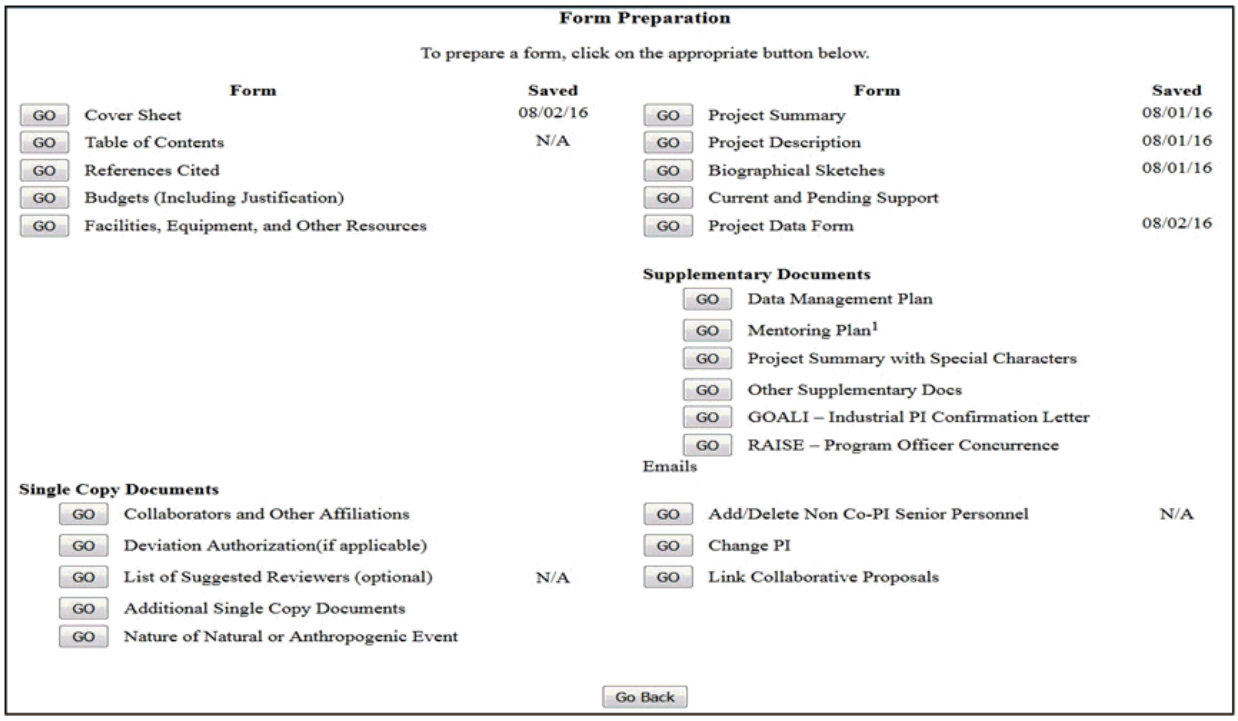


Figure 7 Form Preparation screen. The Go button for the Cover Sheet is circled.

9. Click the **Go** button for Cover Sheet (Figure 7). The **Cover Sheet Components Form** screen displays (Figure 8).

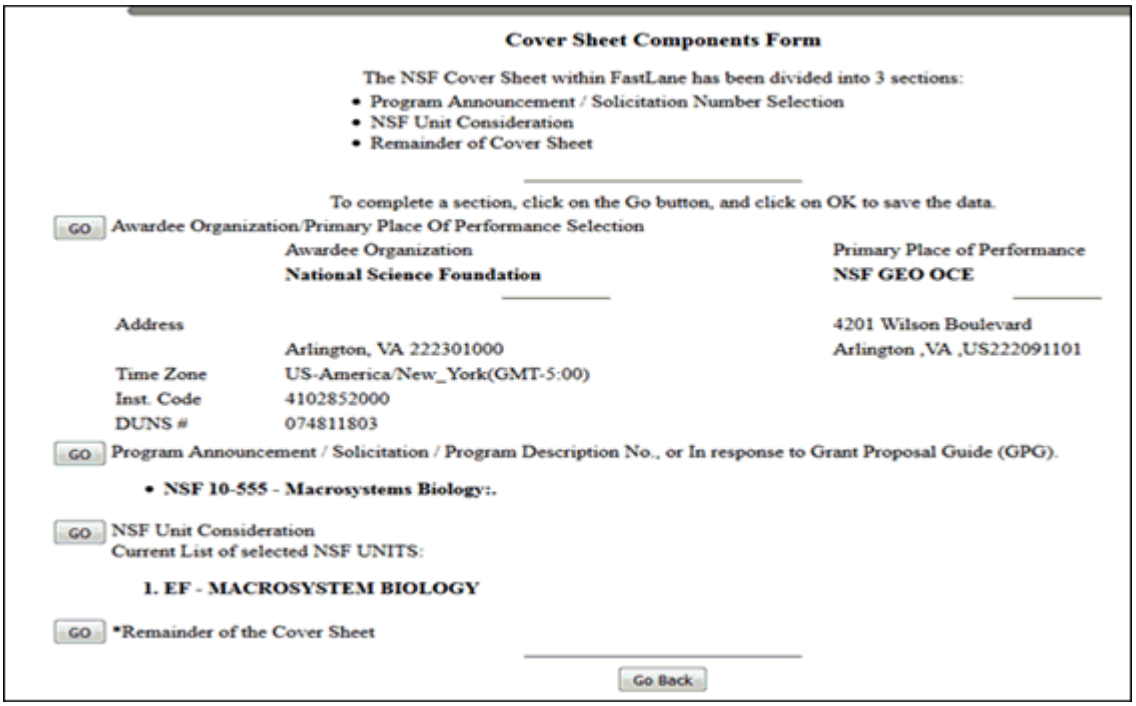


Figure 8 Cover Sheet Components Form screen.

10. Click the **Go** button for Remainder of the Cover Sheet (Figure 8). The **Remainder of the Cover Sheet** screen displays (Figure 9).

Figure 9 Upper portion of the Remainder of the Cover Sheet screen. The Co-PI Information link is circled.

11. Click **Co-PI Information** at the top of the screen (Figure 9). The **Co-Principal Investigator (Co-PI) Information** section displays (Figure 10).

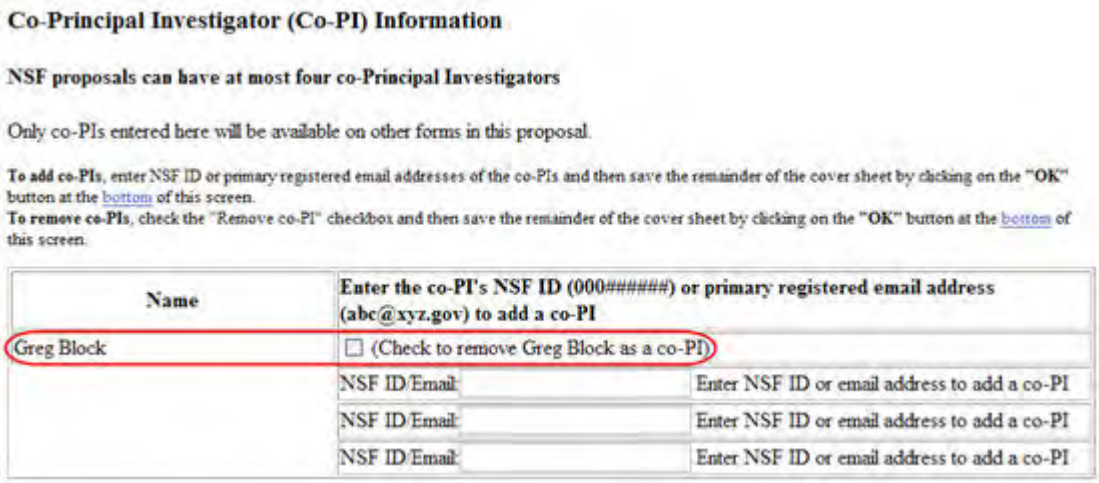


Figure 10 Co-Principal Investigator (Co-PI) Information section of the Remainder of the Cover Sheet screen. A Co-PI's name and the box to check to remove the Co-PI are circled.

12. Click the check mark box (Figure 10) for the Co-PI that you want to remove.
13. Click the **OK** button at the bottom of the screen (Figure 11). A screen displays (Figure 12) with confirmation that the Cover Sheet has been saved. This includes the removal of the Co-PI from the proposal.

Figure 11 Lower portion of the Remainder of the Cover Sheet screen. The OK button is circled.

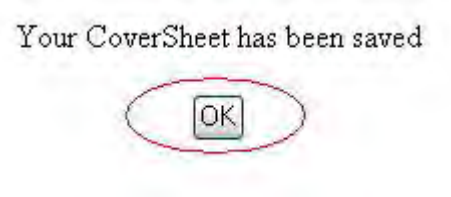


Figure 12 Screen with confirmation that the information on the Cover Sheet is saved.

14. Click the **OK** button (Figure 12). The **Form Preparation** screen displays (Figure 7).

Remove a Non-Co-PI Senior Person from a Proposal

1. On the **FastLane Home Page** screen (Figure 1), click **Proposals, Awards, and Status**. The **Proposals, Awards, and Status** screen displays (Figure 2).

Figure 1 FastLane Home Page screen. The Proposals, Awards, and Status link is circled.

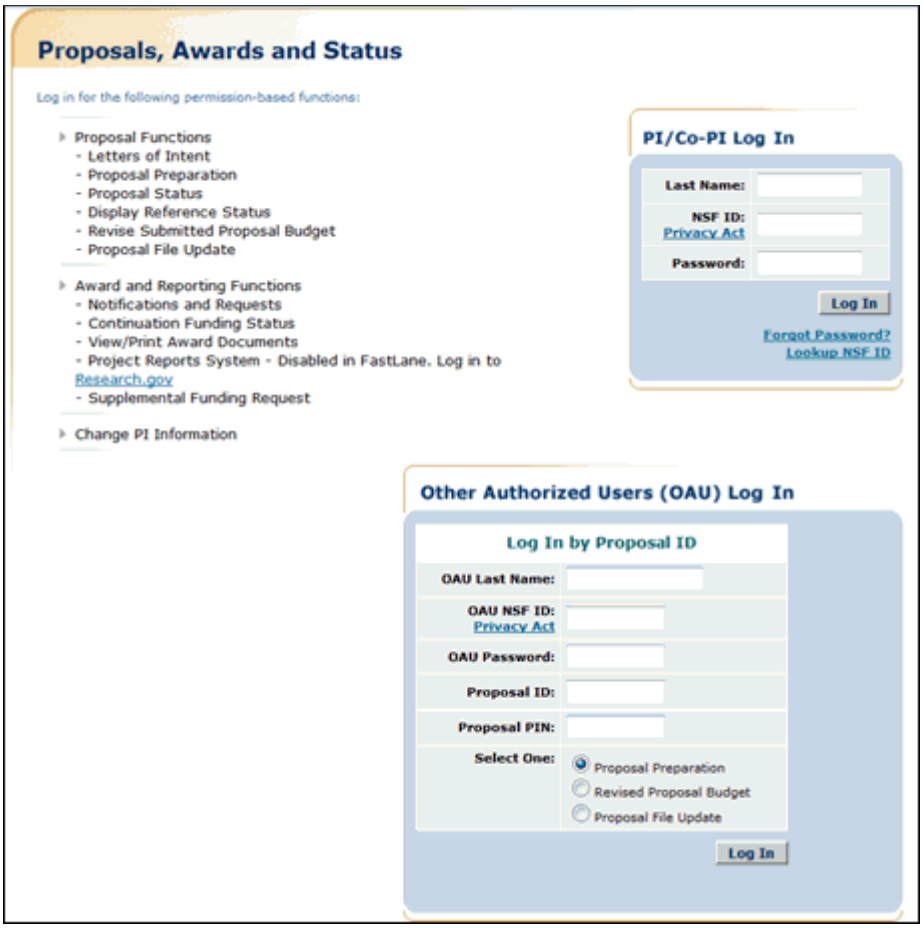


Figure 2 Proposals, Awards, and Status screen. The PI/Co-PI Log In area is circled.

2. In the **PI/Co-PI** section (Figure 1), type the following:
   - Your last name
   - Your National Science Foundation Identification (NSF ID) number
   - Your password
3. Click the **Log In** button (Figure 2). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management** screen displays (Figure 3).

Figure 3 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management screen. The Proposal Functions link is circled.

4. Click **Proposal Functions** (Figure 3). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Proposal Functions** screen displays (Figure 4).

Figure 4 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Proposal Functions screen. The Proposal Preparation link is circled.

5. Click **Proposal Preparation** (Figure 4). The **Principal Investigator (PI) Information** screen displays (Figure 5).

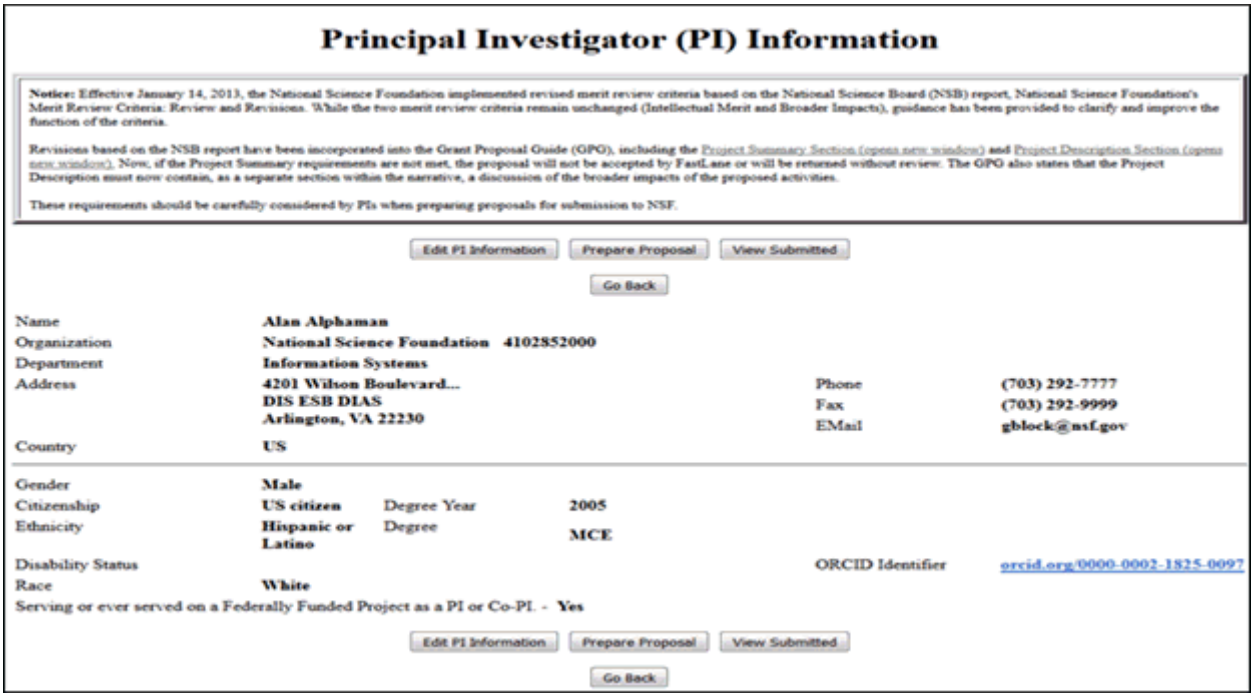


Figure 5 Principal Investigator (PI) Information screen. The Prepare Proposal button is circled.

6. Click the **Prepare Proposal** button (Figure 5). The **Proposal Actions** screen displays (Figure 6).

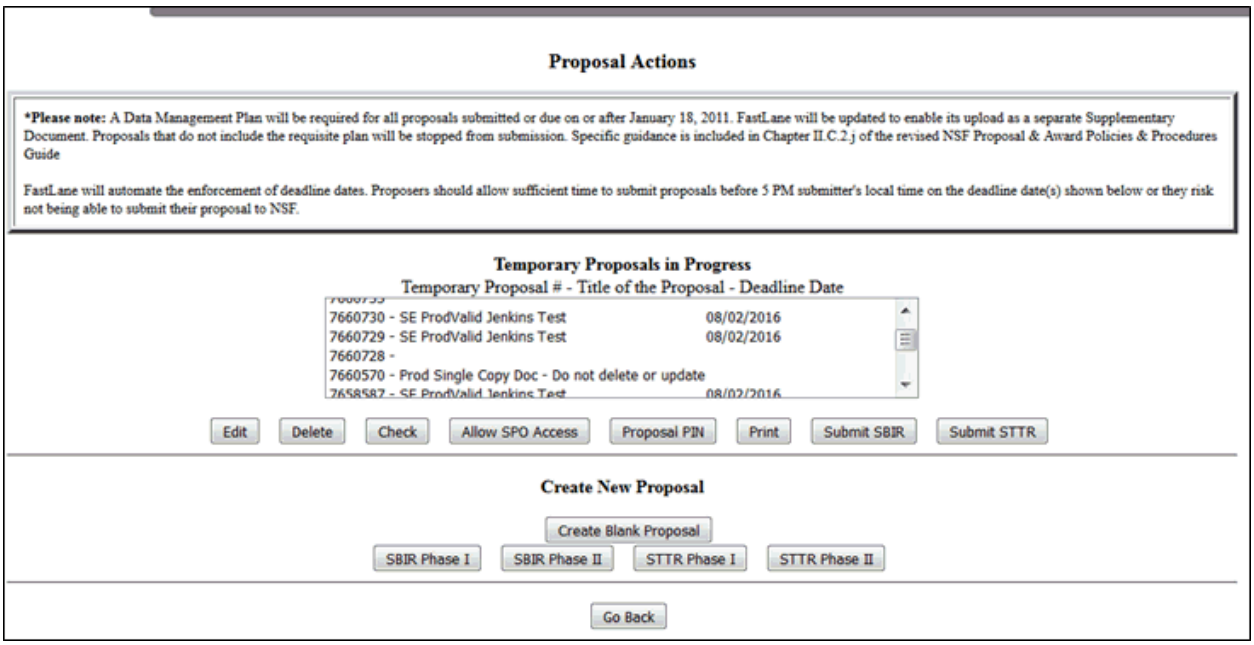


Figure 6 Proposal Actions screen. The Edit button is circled.

7. Highlight the number of the proposal (Figure 6) from which you want to delete a Senior Person.
8. Click the **Edit** button (Figure 6). The **Form Preparation** screen displays (Figure 7).

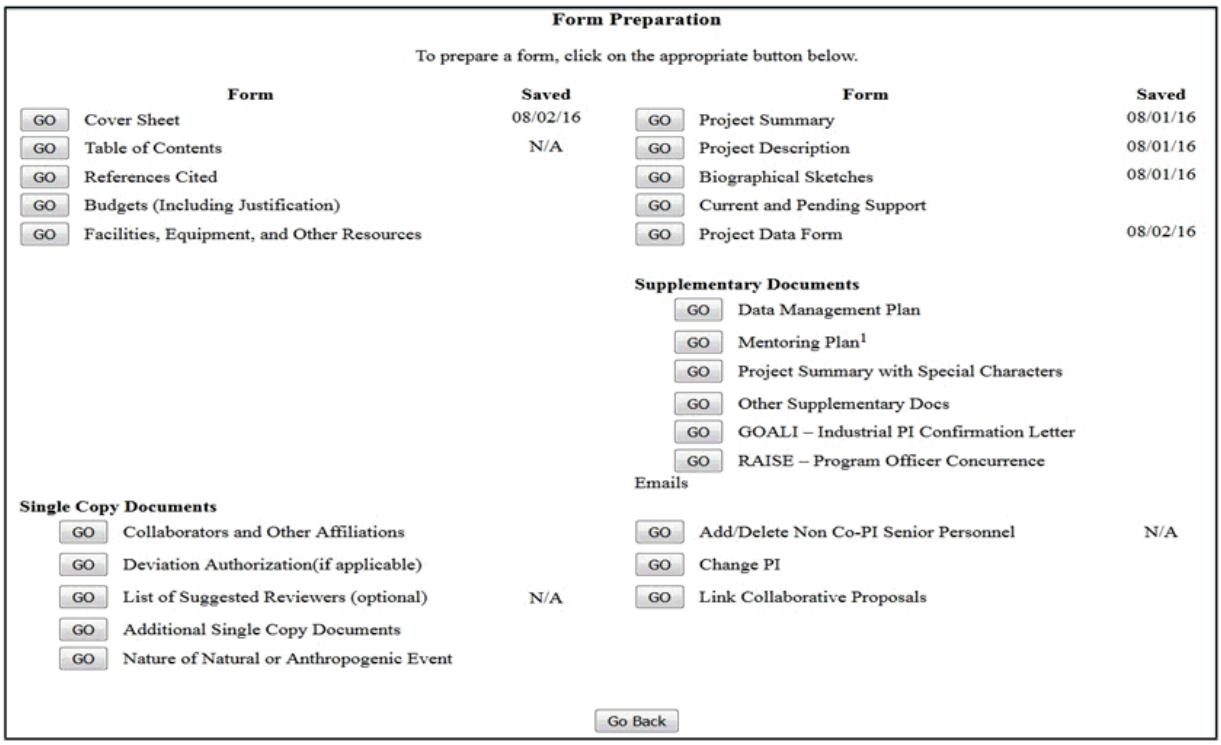


Figure 7 Form Preparation screen. The Go button for Add/Delete Non-Co-PI Senior Personnel is circled.

9. Click the **Go** button (Figure 7) for Add/Delete Non-Co-PI Senior Personnel. The **Add/Delete Non-Co-Principal Investigator (Co-PI) Senior Personnel Assigned to Proposal** screen displays (Figure 8).

Figure 8 Add/Delete Non-Co-Principal Investigator (Co-PI) Senior Personnel Assigned to Proposal screen. The Delete Non-Co-PI Senior Person from Proposal button is circled.

10. Highlight the name of the Senior Person that you want to remove from the proposal (Figure 8).
11. Click the **Delete Non-Co-PI Senior Personnel from Proposal** button (Figure 8). A screen displays (Figure 9) with a message for you to confirm that you want to remove the Senior Person.

Figure 9 Screen with a message for you to confirm that you want to remove the Senior Person.

12. Click the **OK** button (Figure 9). A screen displays (Figure 10) confirming that the Senior Person has been removed from the proposal.

Figure 10 Screen with the message that the Senior Person has been removed from the proposal.

Add or Remove a Co-PI for a Proposal File Update

1. On the **FastLane Home Page** screen (Figure 1), click **Proposals, Awards, and Status**. The **Proposals, Awards, and Status** screen displays (Figure 2).

Figure 1 FastLane Home Page screen. The Proposals, Awards, and Status link is circled.

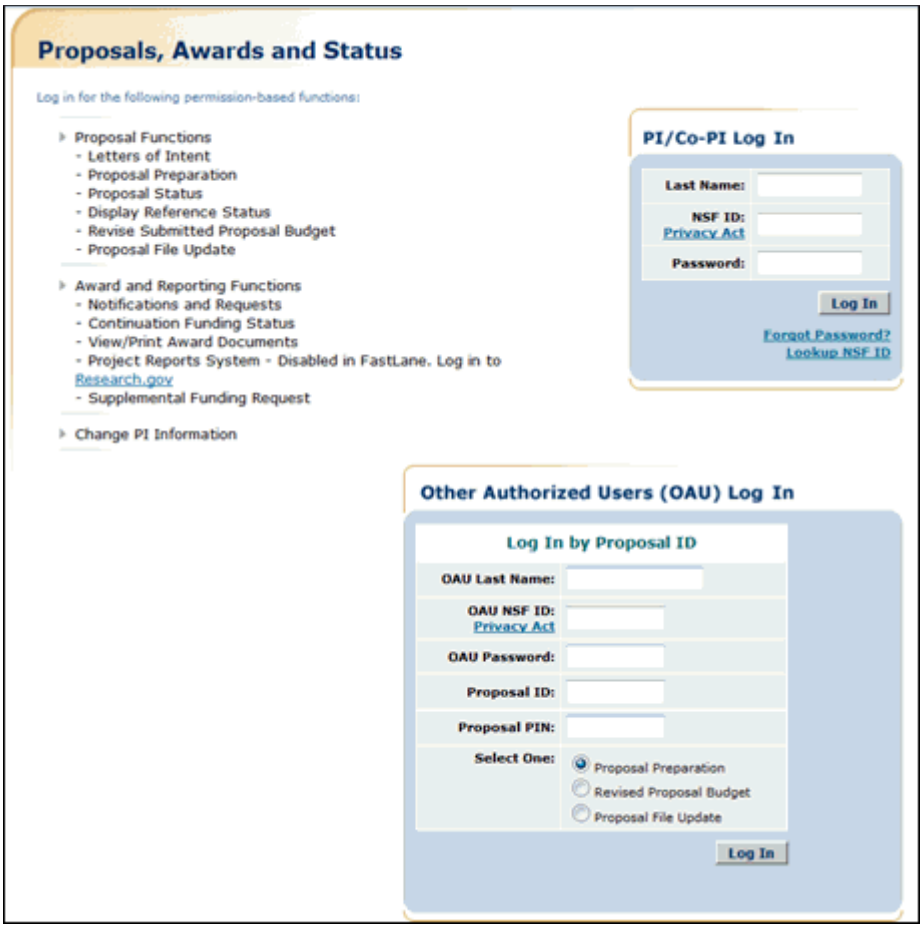


Figure 2 Proposals, Awards, and Status screen. The PI/Co-PI Log In area is circled.

2. In the **PI/Co-PI** section (Figure 1), type the following:
   - Your last name
   - Your National Science Foundation Identification (NSF ID) number
   - Your password
3. Click the **Log In** button (Figure 2). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management** screen displays (Figure 3).

Figure 3 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management screen. The Proposal Functions link is circled.

4. Click **Proposal Functions** (Figure 3). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Proposal Functions** screen displays (Figure 4).

Figure 4 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Proposal Functions screen. The Proposal File Update link is circled.

5. Click **Proposal File Update** (Figure 4). The **List of Proposals Eligible for Update** screen displays (Figure 5).

Figure 5 List of Proposals Eligible for Update screen. The Continue button is circled.

6. Highlight the proposal (Figure 5) for which you want to add or remove a Senior Person.
7. Click the **Continue** button (Figure 5). The **Proposal Update Control** screen displays (Figure 6).

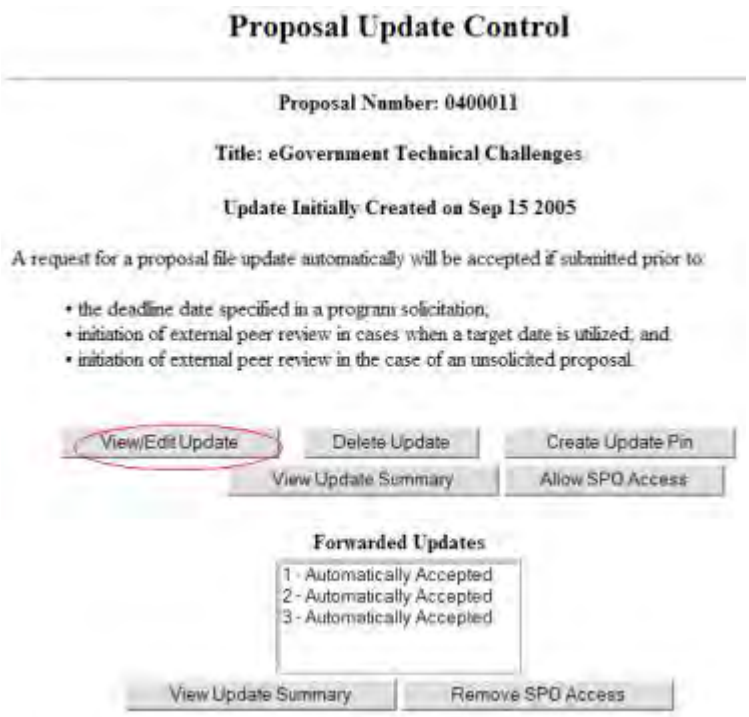
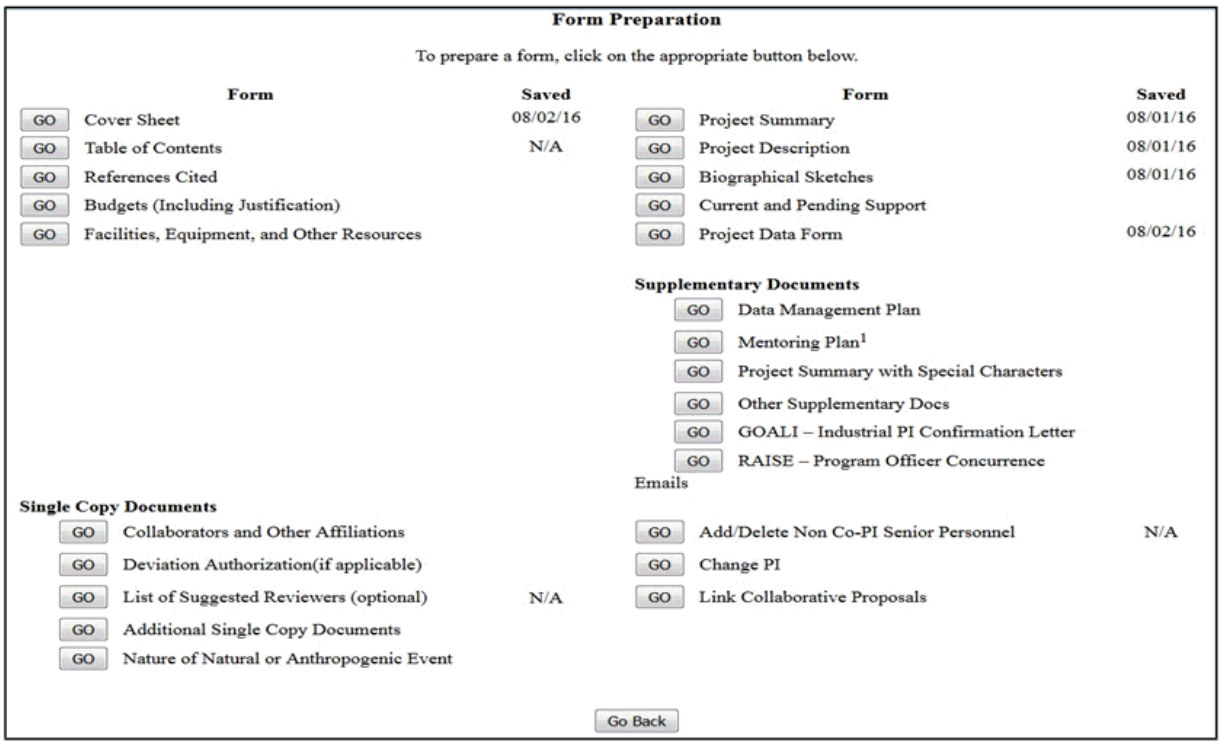


Figure 6 Proposal Update Control screen. The View / Edit Update button is circled.

8. Click the **View / Edit Update** button (Figure 6). The **Form Preparation** screen displays (Figure 7).



Form Preparation

To prepare a form, click on the appropriate button below.

	Form	Saved		Form	Saved
GO	Cover Sheet	08/02/16	GO	Project Summary	08/01/16
GO	Table of Contents	N/A	GO	Project Description	08/01/16
GO	References Cited		GO	Biographical Sketches	08/01/16
GO	Budgets (Including Justification)		GO	Current and Pending Support	
GO	Facilities, Equipment, and Other Resources		GO	Project Data Form	08/02/16

Supplementary Documents

- GO Data Management Plan
- GO Mentoring Plan[1]
- GO Project Summary with Special Characters
- GO Other Supplementary Docs
- GO GOALI – Industrial PI Confirmation Letter
- GO RAISE – Program Officer Concurrence

Emails

GO	Add/Delete Non Co-PI Senior Personnel	N/A	GO	Change PI	
GO	Link Collaborative Proposals				

Single Copy Documents

GO	Collaborators and Other Affiliations	
GO	Deviation Authorization(if applicable)	
GO	List of Suggested Reviewers (optional)	N/A
GO	Additional Single Copy Documents	
GO	Nature of Natural or Anthropogenic Event	

Go Back

Figure 7 Form Preparation Screen. The Go button for Cover Sheet is circled.

9. Click the **Go** button for Cover Sheet (Figure 7). The **Cover Sheet Components Form** screen displays (Figure 8).

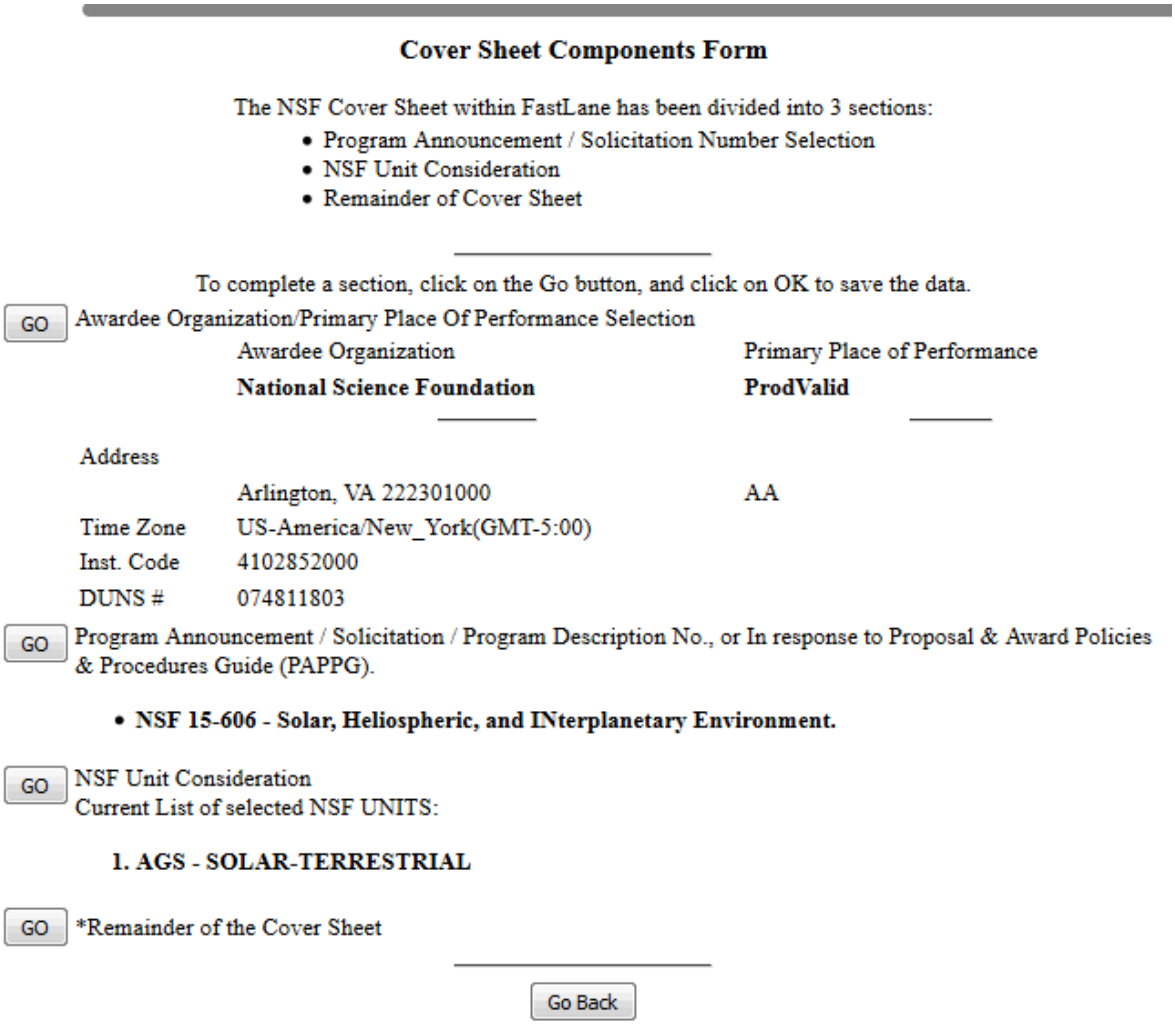


Figure 8 Cover Sheet Components Form screen. The Go button for Remainder of the Cover Sheet is circled.

10. Click the **Go** button for Remainder of the Cover Sheet (Figure 8). The **Remainder of the Cover Sheet** screen displays (Figure 9).

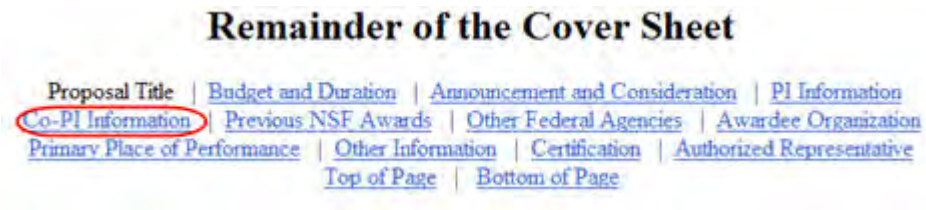
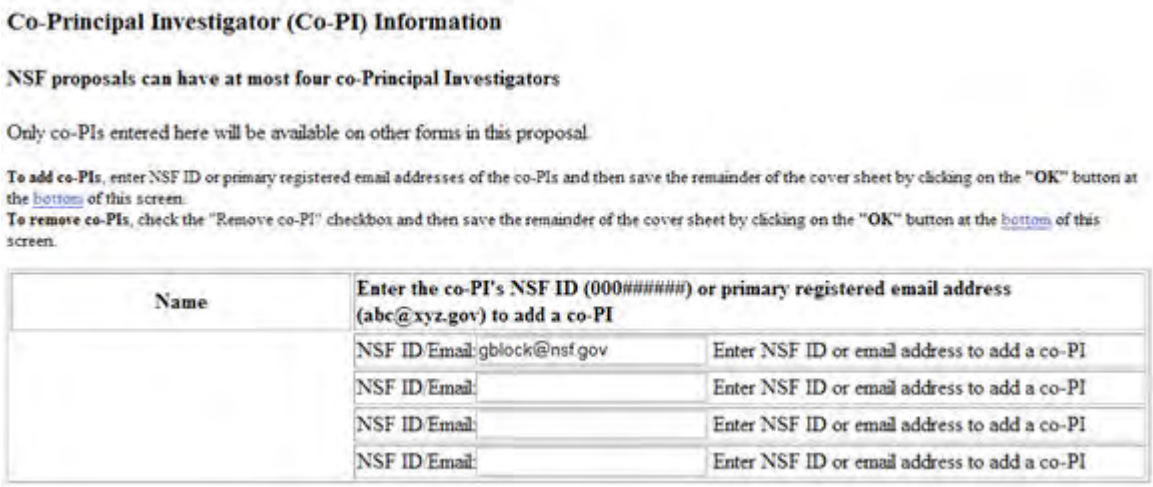


Figure 9 Upper portion of the Remainder of the Cover Sheet screen. The Co-PI Information link is circled.

11. Click **Co-PI Information** at the top of the screen (Figure 9). The **Co-Principal Investigator (Co-PI) Information** section displays (Figure 10). In this section, you can do either one or both of the following:
    - Add a Co-PI
    - Remove a Co-PI



Co-Principal Investigator (Co-PI) Information

NSF proposals can have at most four co-Principal Investigators

Only co-PIs entered here will be available on other forms in this proposal.

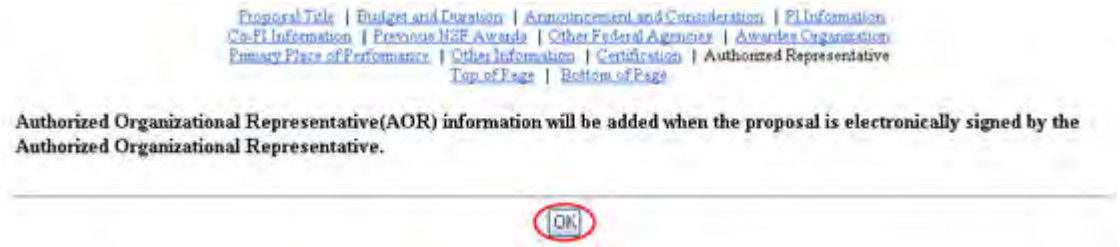
To add co-PIs, enter NSF ID or primary registered email addresses of the co-PIs and then save the remainder of the cover sheet by clicking on the **"OK"** button at the bottom of this screen.
To remove co-PIs, check the "Remove co-PI" checkbox and then save the remainder of the cover sheet by clicking on the **"OK"** button at the bottom of this screen.

Name	Enter the co-PI's NSF ID (000#######) or primary registered email address (abc@xyz.gov) to add a co-PI		
	NSF ID/Email:	gblock@nsf.gov	Enter NSF ID or email address to add a co-PI
	NSF ID/Email:		Enter NSF ID or email address to add a co-PI
	NSF ID/Email:		Enter NSF ID or email address to add a co-PI
	NSF ID/Email:		Enter NSF ID or email address to add a co-PI

Figure 10 Co-Principal Investigator (Co-PI) Information section of the Remainder of the Cover Sheet screen.

Add a Co-PI to a Proposal File Update

1. In the **NSF ID/Email** box (Figure 10), type the NSF ID or email address of the Co-PI you want to add to the proposal file update. (Repeat for up to four Co-PIs on a proposal.)
2. Click the **OK** button at the bottom of the screen (Figure 11). A screen displays (Figure 12) with confirmation that the Cover Sheet has been saved, including the addition of the Co-PI to the proposal.



Proposal Title | Budget and Duration | Announcement and Consideration | PI Information
Co-PI Information | Previous NSF Awards | Other Federal Agencies | Awardee Organization
Primary Place of Performance | Other Information | Certification | Authorized Representative
Top of Page | Bottom of Page

Authorized Organizational Representative(AOR) information will be added when the proposal is electronically signed by the Authorized Organizational Representative.

OK

Figure 11 Lower portion of the Remainder of the Cover Sheet screen. The OK button is circled.

Figure 12 Screen with confirmation that the information on the Cover Sheet is saved. This includes the addition of the Co-PI to the proposal.

Remove a Co-PI from a Proposal File Update

1. In the **Co-Principal Investigator (Co-PI) Information** section of the **Remainder of the Cover Sheet** screen (Figure 13), click the check mark box for the Co-PI that you want to remove.

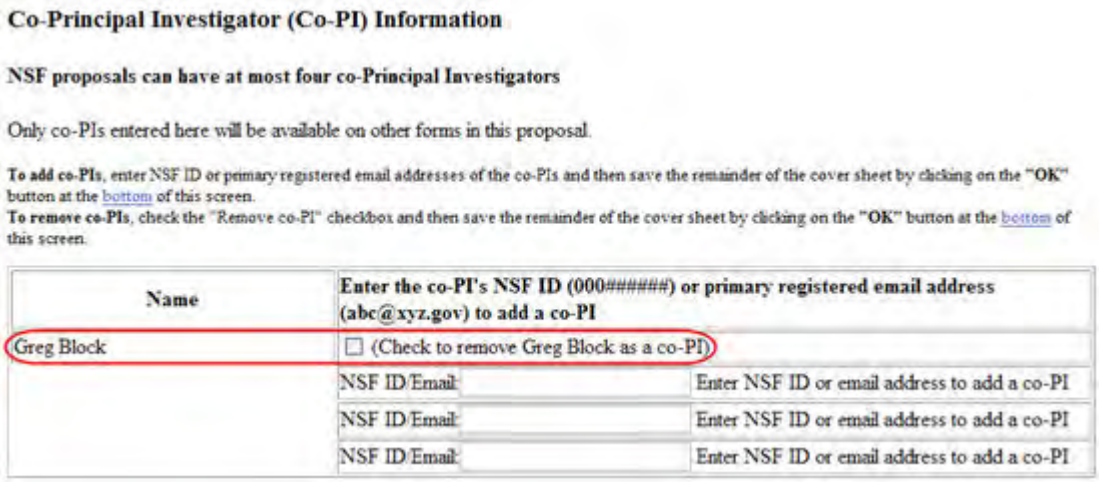


Figure 13 Co-Principal Investigator (Co-PI) Information section of the Remainder of the Cover Sheet screen. A Co-PI's name and the box to check to remove the Co-PI are circled.

2. Click the **OK** button at the bottom of the screen (Figure 14). A screen displays (Figure 15) with confirmation that the Cover Sheet has been saved. This includes the removal of the Co-PI from the proposal.

Figure 14 Lower portion of the Remainder of the Cover Sheet screen. The OK button is circled.

Figure 15 Screen with confirmation that the information on the Cover Sheet is saved.

3. Click the **OK** button (Figure 12). The **Form Preparation** screen displays (Figure 7)

Add or Delete Senior Personnel for a Letter of Intent

1. On the **FastLane Home Page** screen (Figure 1), click **Proposals, Awards, and Status**. The **Proposals, Awards, and Status** screen displays (Figure 2).

Figure 1 FastLane Home Page screen. The Proposals, Awards, and Status link is circled.

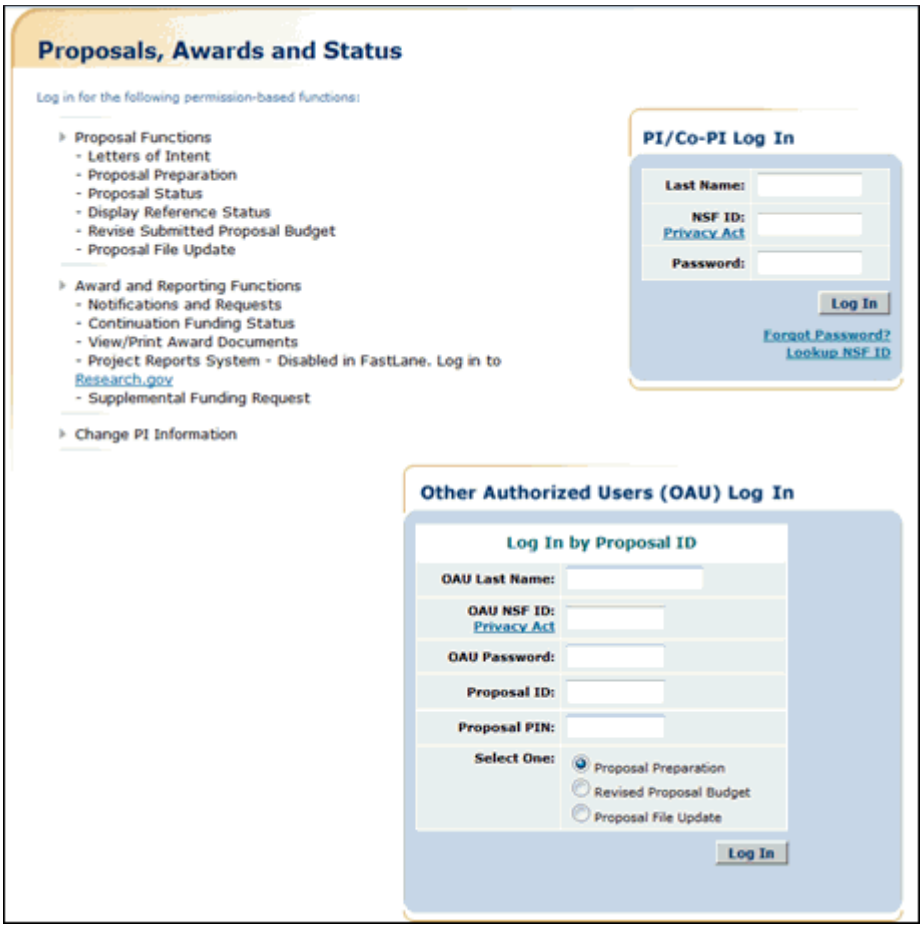


Figure 2 Proposals, Awards, and Status screen. The PI/Co-PI Log In area is circled.

2. In the **PI/Co-PI** section (Figure 1), type the following:
   - Your last name
   - Your National Science Foundation Identification (NSF ID) number
   - Your password
3. Click the **Log In** button (Figure 2). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management** screen displays (Figure 3).

Figure 3 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management screen. The Proposal Functions link is circled.

4. Click **Proposal Functions** (Figure 3). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Proposal Functions** screen displays (Figure 4).

Figure 4 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Proposal Functions screen. The Letters of Intent link is circled.

5. Click **Letters of Intent** (Figure 4). The **Letters of Intent** screen displays on the **Create New LOI from Solicitation** tab (Figure 5).

Figure 5 Letters of Intent screen on the Create New LOI from Program Solicitation tab. The Edit/View LOI tab is circled.

6. Click the **Edit/View LOI** tab (Figure 5). The **Letters of Intent** screen displays on the **Edit/View LOI** tab (Figure 6).

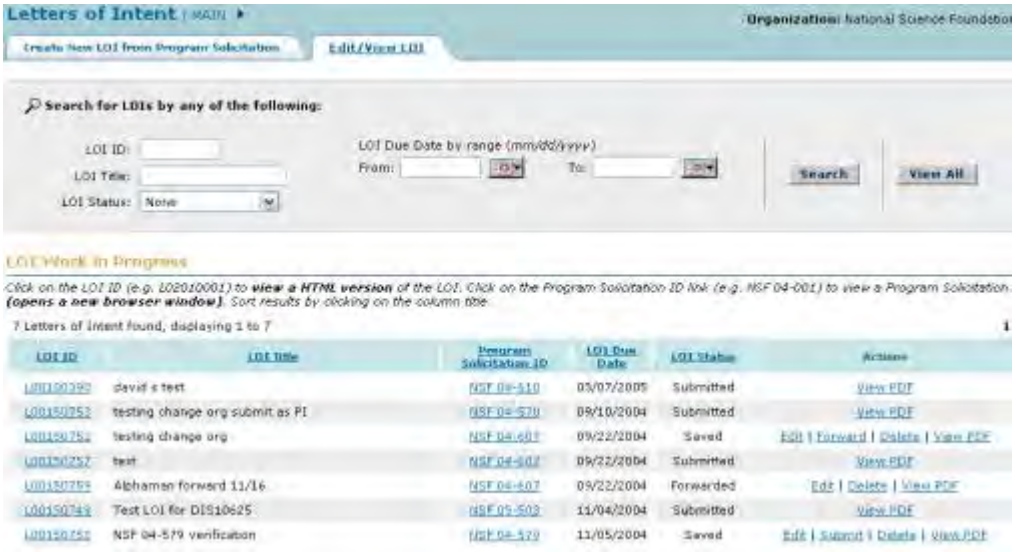


Figure 6 Letters of Intent screen on the Edit/View LOI tab.

7. Click **Edit** (Figure 6) on the row for the Letter of Intent that you want to add or delete Senior Personnel for. The **Edit LOI** screen displays (Figure 7).

Figure 7 Edit LOI screen. The Add/Edit Personnel button is circled.

8. Click the **Add/Edit Personnel** button at the bottom of the screen (Figure 7). The **Edit LOI—Add/Edit Other Senior Personnel** screen displays (Figure 8), where you can do either or both of the following:
   - Add a Senior Person
   - Delete a Senior Person

Figure 8 Edit LOI—Add/Edit Other Senior Personnel screen. The Add to List button is circled.

Add a Senior Person

1. To add a Senior Person, type the following on the **Edit LOI—Add/Edit Other Senior Personnel** screen (Figure 8):
   - In the **First Name** box, type the individual's first name.
   - In the **Middle Initial** box, type the individual's middle initial (optional).
   - In the **Last Name** box, type the individual's last name.
   - In the **Organization Name** box, type the name of the organization registered with NSF.
   - In the **Department** box, type the individual's research department.
   - In the **City** box, type the individual's city.
   - In the **State** box, type the individual's state (optional).
   - In the **Country** box, select the country from the drop-down list.
2. Click the **Add to List** button (Figure 8). The **Edit LOI—Add/Edit Other Senior Personnel** screen displays (Figure 9) with the individual's name now listed in the **Existing Personnel** section.

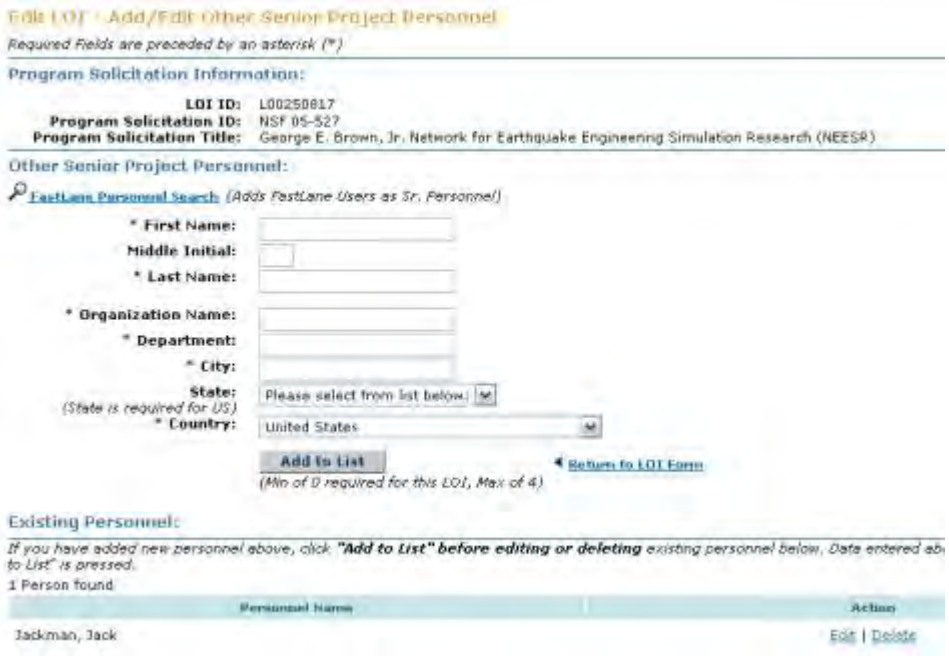


Figure 9 Edit LOI—Add/Edit Other Senior Personnel screen. The individual's name is now listed in the Existing Personnel section.

Delete a Senior Person

On the **Edit LOI—Add/Edit Other Senior Project Personnel** screen (Figure 10), click **Delete** in the row for the Senior Person whose name you want to delete. The **Edit LOI—Add/Edit Other Senior Project Personnel** screen displays (Figure 11) with the Senior Person's name no longer listed in the **Existing Personnel** section.

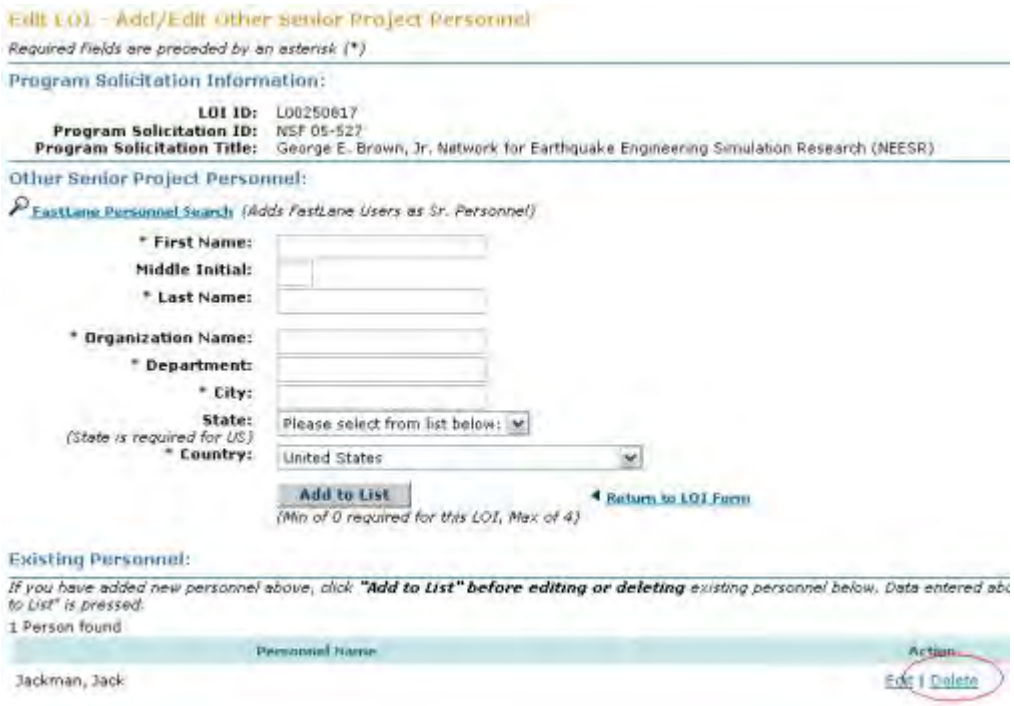


Figure 10 Edit LOI—Add/Edit Other Senior Project Personnel screen. The Delete link is circled.

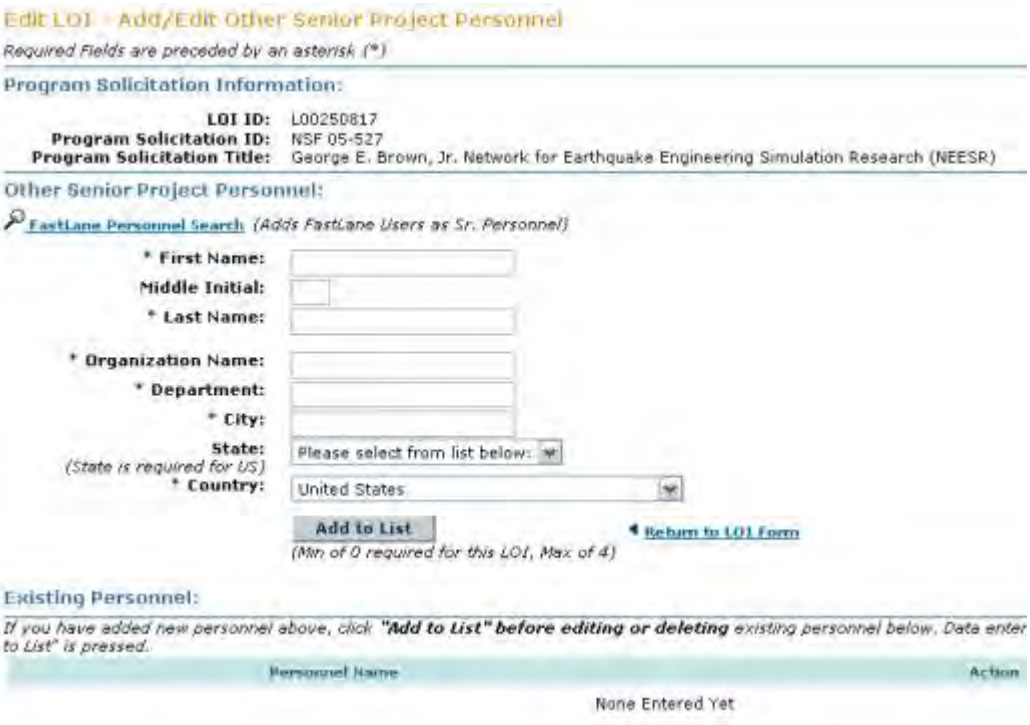


Figure 11 Edit LOI—Add/Edit Other Senior Project Personnel screen with the Senior Person no longer listed in the Existing Personnel section.

Add or Delete Senior Personnel for a Proposal File Update

1. On the **FastLane Home Page** screen (Figure 1), click **Proposals, Awards, and Status**. The **Proposals, Awards, and Status** screen displays (Figure 2).

Figure 1 FastLane Home Page screen. The Proposals, Awards, and Status link is circled.

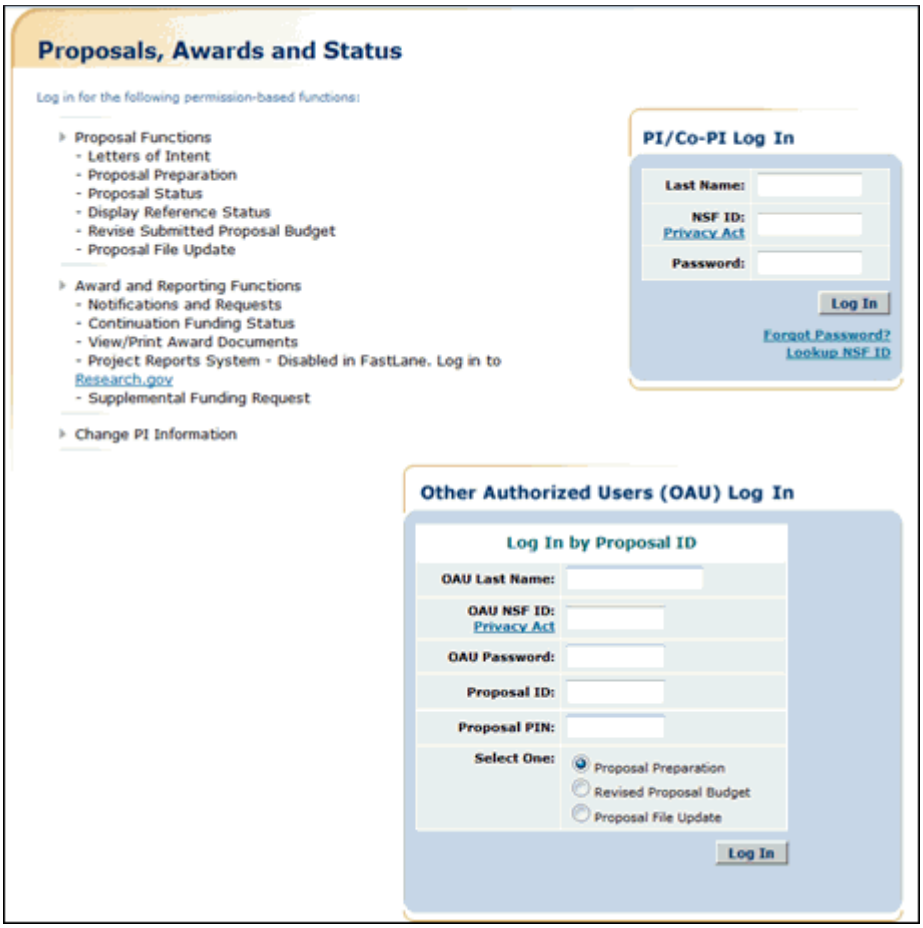


Figure 2 Proposals, Awards, and Status screen. The PI/Co-PI Log In area is circled.

2. In the **PI/Co-PI** section (Figure 1), type the following:
   - Your last name
   - Your National Science Foundation Identification (NSF ID) number
   - Your password
3. Click the **Log In** button (Figure 2). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management** screen displays (Figure 3).

Figure 3 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management screen. The Proposal Functions link is circled.

4. Click **Proposal Functions** (Figure 3). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Proposal Functions** screen displays (Figure 4).

Figure 4 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Proposal Functions screen. The Proposal File Update link is circled.

5. Click **Proposal File Update** (Figure 4). The **List of Proposals Eligible for Update** screen displays (Figure 5).

Figure 5 List of Proposals Eligible for Update screen. The Continue button is circled.

6. Highlight the proposal (Figure 5) for which you want to add or remove a Senior Person.
7. Click the **Continue** button (Figure 5). The **Proposal Update Control** screen displays (Figure 6).

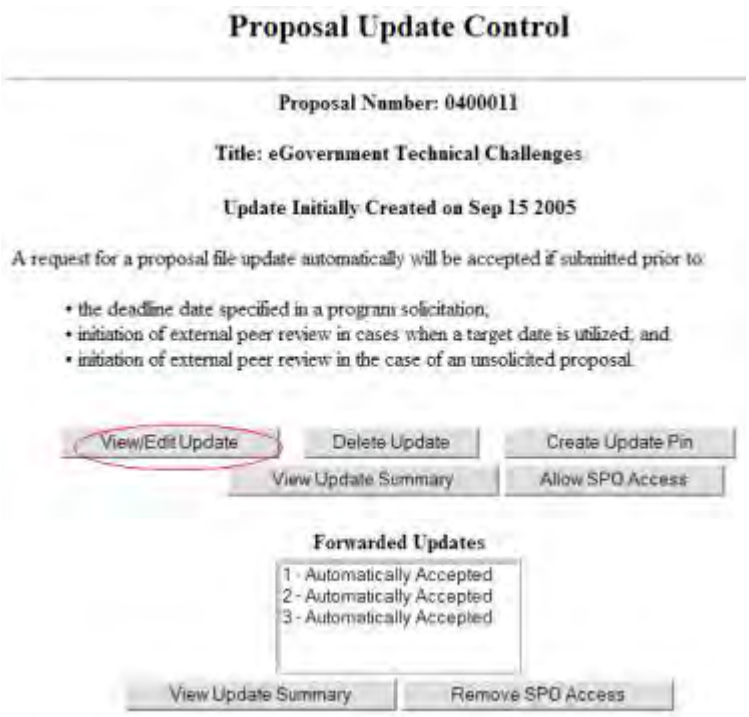
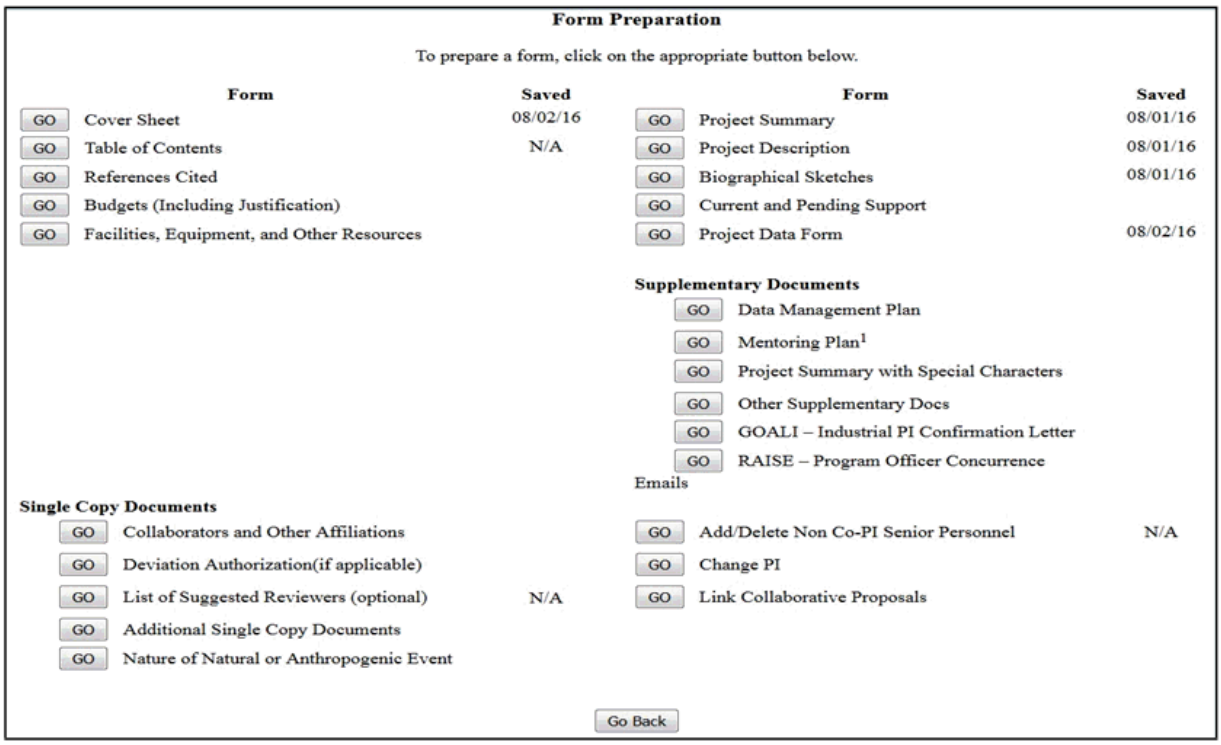


Figure 6 Proposal Update Control screen. The View / Edit Update button is circled.

8. Click the **View / Edit Update** button (Figure 6). The **Form Preparation** screen displays (Figure 7).



Form Preparation

To prepare a form, click on the appropriate button below.

Form	Saved	Form	Saved
GO Cover Sheet	08/02/16	GO Project Summary	08/01/16
GO Table of Contents	N/A	GO Project Description	08/01/16
GO References Cited		GO Biographical Sketches	08/01/16
GO Budgets (Including Justification)		GO Current and Pending Support	
GO Facilities, Equipment, and Other Resources		GO Project Data Form	08/02/16

Supplementary Documents

- GO Data Management Plan
- GO Mentoring Plan[1]
- GO Project Summary with Special Characters
- GO Other Supplementary Docs
- GO GOALI – Industrial PI Confirmation Letter
- GO RAISE – Program Officer Concurrence

Emails

Single Copy Documents			
GO Collaborators and Other Affiliations		GO Add/Delete Non Co-PI Senior Personnel	N/A
GO Deviation Authorization(if applicable)		GO Change PI	
GO List of Suggested Reviewers (optional)	N/A	GO Link Collaborative Proposals	
GO Additional Single Copy Documents			
GO Nature of Natural or Anthropogenic Event			

Go Back

Figure 7 Form Preparation screen. The Add/Delete Non-Co-PI Senior Personnel button is circled.

9. Click the **Go** button for Add/Delete Non-Co-PI Senior Personnel (Figure 7). The **Add/Delete Non-Co-Principal Investigator (Co-PI) Senior Personnel Assigned to Proposal** screen displays (Figure 8). On this screen you can do either one or both of the following:
   - Add a Senior Person
   - Delete a Senior Person

Figure 8 Add/Delete Non-Co-Principal Investigator (Co-PI) Senior Personnel Assigned to Proposal screen. The Add Non-Co-PI Senior Person to Proposal button is circled.

Add a Senior Person

1. On the **Add/Delete Non-Co-Principal Investigator (Co-PI) Senior Personnel Assigned to Proposal** screen (Figure 8), type the individual's first and last name and middle initial in the appropriate boxes.
2. Click the **Add Non-Co-PI Senior Person to Proposal** button (Figure 8). The **Add/Delete Non-Co-Principal Investigator (Co-PI) Senior Personnel Assigned to Proposal** screen displays (Figure 9) with the individual listed as a Senior Person. The individual is also now listed on the **Budget Personnel** screen (Figure 10) as a Senior Person for whom funds can be allocated.

Figure 9 Add/Delete Non-Co-Principal Investigator (Co-PI) Senior Personnel Assigned to Proposal screen. The newly added Senior Person now appears in the list of Senior Personnel.

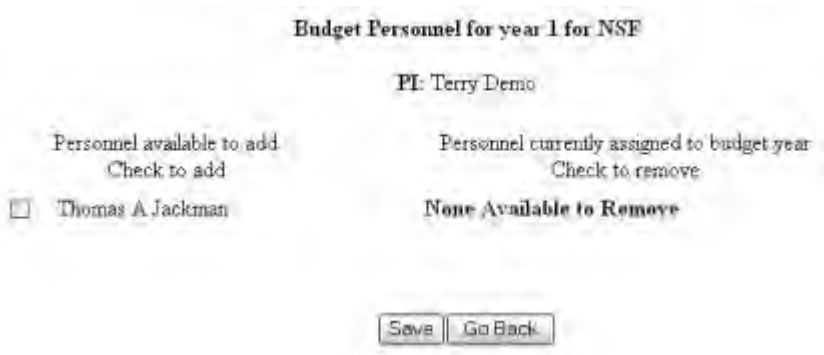


Figure 10 Budget Personnel screen. The name of the newly added Senior Person is listed for addition if necessary as a person for whom funds are to be allocated.

Delete a Senior Person

1. On the **Add/Delete Non-Co-Principal Investigator (Co-PI) Senior Personnel Assigned to Proposal** screen (Figure 11), highlight the name of the Senior Person that you want to remove.

Figure 11 Add/Delete Non-Co-Principal Investigator (Co-PI) Senior Personnel Assigned to Proposal screen. The Delete Non-Co-PI Senior Person from Proposal button is circled.

2. Click the **Delete Non-Co-PI Senior Personnel from Proposal** button (Figure 10). A screen displays (Figure 12) with a message for you to confirm that you want to remove the Senior Person.

Figure 11 Screen with a message for you to confirm that you want to remove the Senior Person.

3. Click the **OK** button (Figure 12). A screen displays (Figure 13) confirming that the Senior Person has been removed.

Figure 13 Screen with the message that the Senior Person has been removed.

Add or Delete Senior Personnel for a Revised Submitted Budget

1. On the **FastLane Home Page** screen (Figure 1), click **Proposals, Awards, and Status**. The **Proposals, Awards, and Status** screen displays (Figure 2).

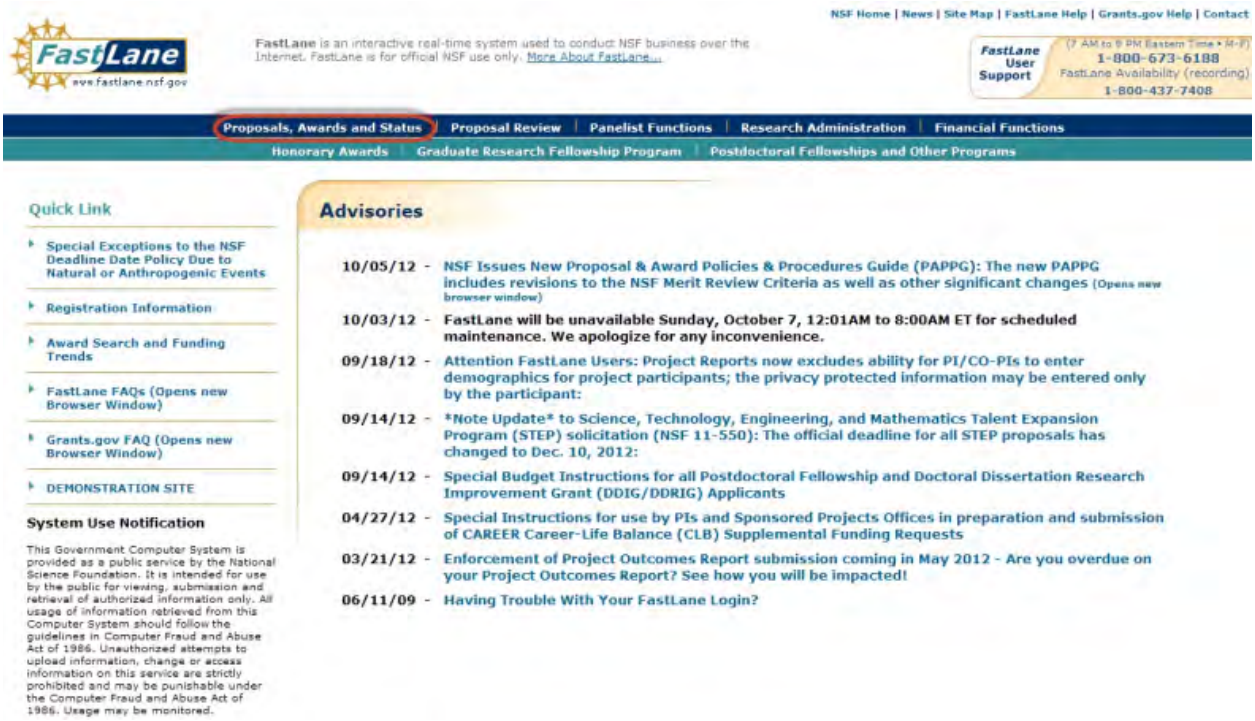


Figure 1 FastLane Home Page screen. The Proposals, Awards, and Status link is circled.

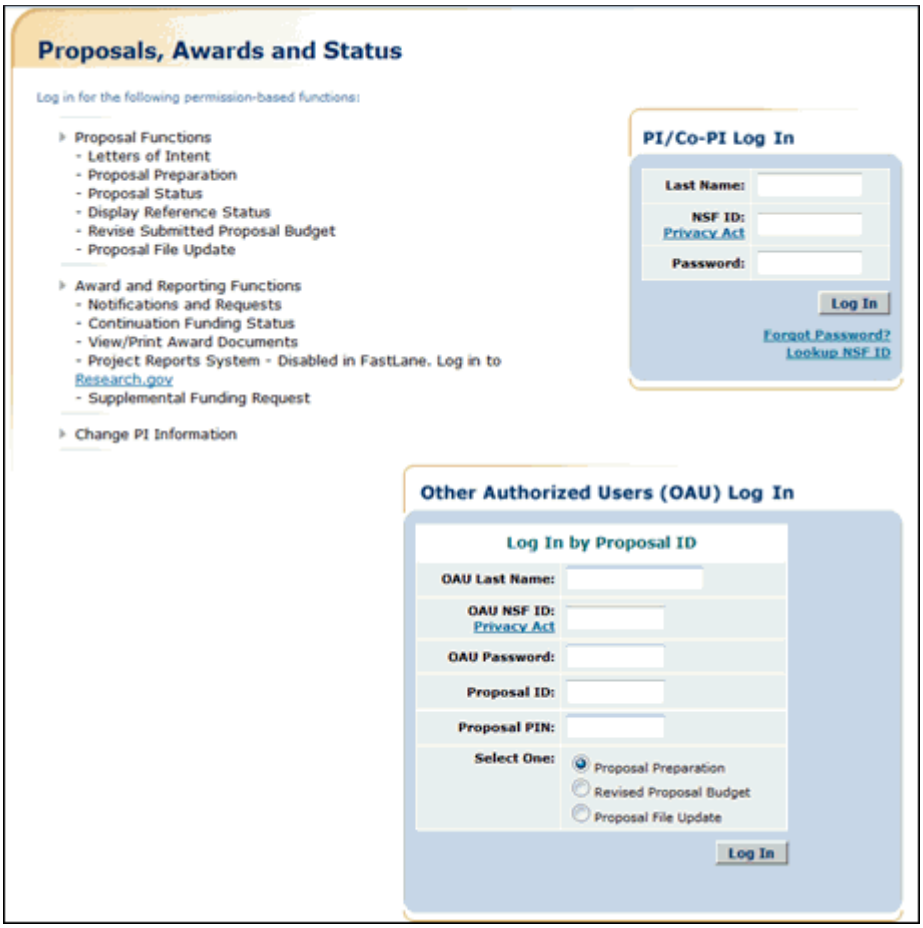


Figure 2 Proposals, Awards, and Status screen. The PI/Co-PI Log In area is circled.

2. In the **PI/Co-PI** section (Figure 1), type the following:
   - Your last name
   - Your National Science Foundation Identification (NSF ID) number
   - Your password
3. Click the **Log In** button (Figure 2). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management** screen displays (Figure 3).

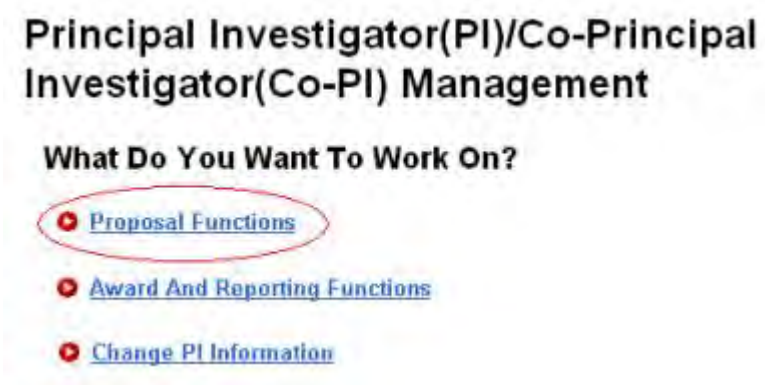


Figure 3 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management screen. The Proposal Functions link is circled.

4. Click **Proposal Functions** (Figure 3). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Proposal Functions** screen displays (Figure 4).

Figure 4 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Proposal Functions screen. The Revise Submitted Proposal Budget link is circled.

5. Click **Revise** Submitted Proposal Budget (Figure 4). The **List of Proposals** screen displays (Figure 5).

Figure 5 List of Proposal screen. The View button is circled.

6. Highlight the proposal for which you want to add or delete a Senior Person (Figure 5).
7. Click the **View** button (Figure 5). The **Proposal Revised Budget** screen displays (Figure 6).

Figure 6 Proposal Revised Budget screen. The radio button for Add/Delete Senior Personnel and the OK button are circled.

8. Click the radio button (Figure 7) for Add/Delete Non-Co-PI Senior Personnel.
9. Click the **OK** button (Figure 7). The **Add/Delete Non-Co-Principal Investigator (Co-PI) Senior Personnel Assigned to Proposal** screen displays (Figure 8). On this screen you can do either one or both of the following:
   - Add a Senior Person
   - Delete a Senior Person

Figure 7 Add/Delete Non-Co-Principal Investigator (Co-PI) Senior Personnel Assigned to Proposal screen. The Add Non-Co-PI Senior Person to Proposal button is circled.

Add a Senior Person

1. On the **Add/Delete Non-Co-Principal Investigator (Co-PI) Senior Personnel Assigned to Proposal** screen (Figure 7), type the individual's first and last name and middle initial in the appropriate boxes.
2. Click the **Add Non-Co-PI Senior Person to Proposal** button (Figure 7). The **Add/Delete Non-Co-Principal Investigator (Co-PI) Senior Personnel Assigned to Proposal** screen displays (Figure 8) with the individual listed as a Senior Person. The individual is also now listed on the **Budget Personnel** screen (Figure 9) as a Senior Person for whom funds may be allocated.

Figure 8 Add/Delete Non-Co-Principal Investigator (Co-PI) Senior Personnel Assigned to Proposal screen. The newly added Senior Person now appears in the list of Senior Personnel.

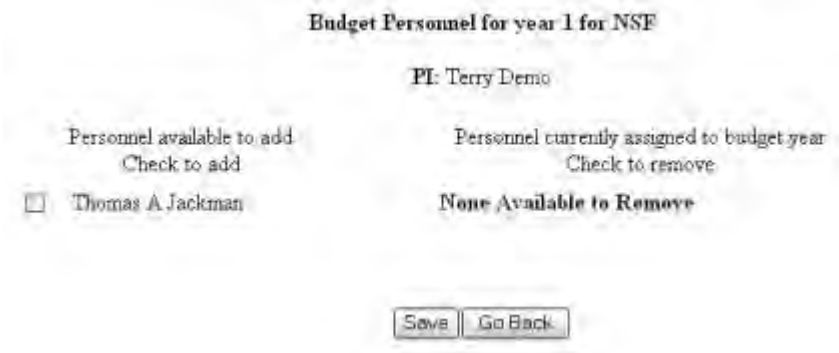


Figure 9 Budget Personnel screen. The name of the newly added Senior Person is listed for addition if necessary as a person for whom funds may be allocated.

Delete a Senior Person

1. On the **Add/Delete Non-Co-Principal Investigator (Co-PI) Senior Personnel Assigned to Proposal** screen (Figure 10), highlight the name of the Senior Person that you want to remove.

Figure 10 Add/Delete Non-Co-Principal Investigator (Co-PI) Senior Personnel Assigned to Proposal screen. The Delete Non-Co-PI Senior Person from Proposal button is circled.

2. Click the **Delete Non-Co-PI Senior Personnel from Proposal** button (Figure 10). A screen displays (Figure 11) with a message for you to confirm that you want to remove the Senior Person.

Figure 11 Screen with a message for you to confirm that you want to remove the Senior Person.

3. Click the **OK** button (Figure 11). A screen displays (Figure 12) confirming that the Senior Person has been removed.

Figure 12 Screen with the message that the Senior Person has been removed.

Create a Proposal PIN

To enable an Other Authorized User (OAU) to work on a proposal, you must create a Proposal PIN and give this PIN to the OAU. The OAU needs the PIN to log into Proposals, Awards, and Status to work on the proposal, a proposal update, or a revised submitted budget.

1. On the **FastLane Home Page** screen (Figure 1), click **Proposals, Awards, and Status**. The **Proposals, Awards, and Status** screen displays (Figure 2).

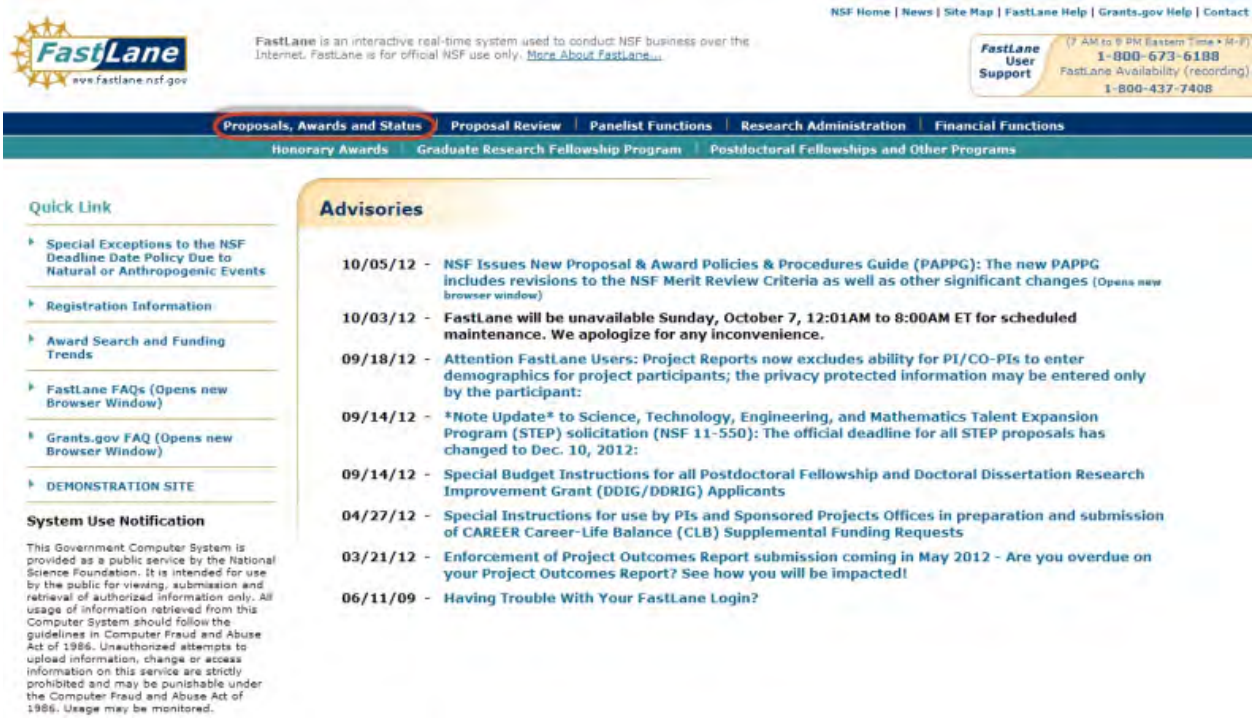


Figure 1 FastLane Home Page screen. The Proposals, Awards, and Status link is circled.

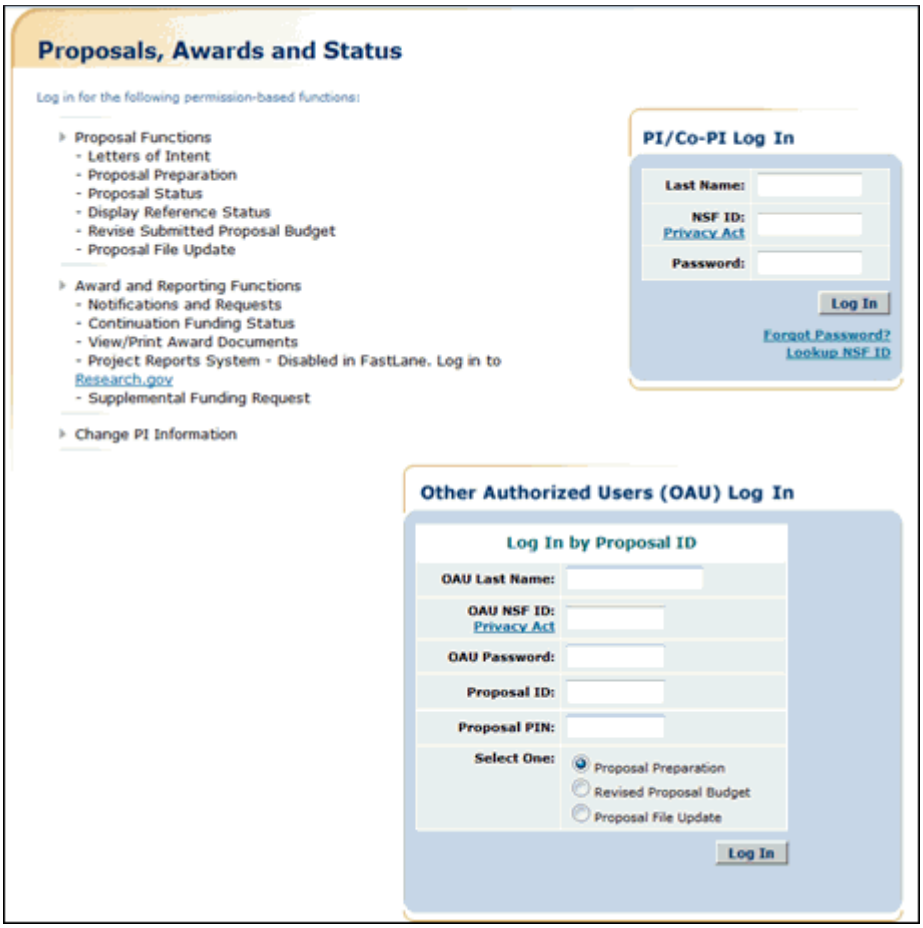


Figure 2 Proposals, Awards, and Status screen. The PI/Co-PI Log In area is circled.

2. In the **PI/Co-PI** section (Figure 1), type the following:
   - Your last name
   - Your National Science Foundation Identification (NSF ID) number
   - Your password
3. Click the **Log In** button (Figure 2). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management** screen displays (Figure 3).

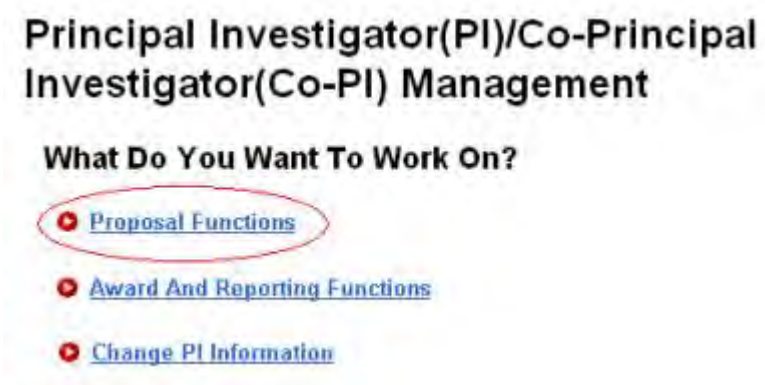


Figure 3 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management screen. The Proposal Functions link is circled.

4. Click **Proposal Functions** (Figure 3). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Proposal Functions** screen displays (Figure 4).

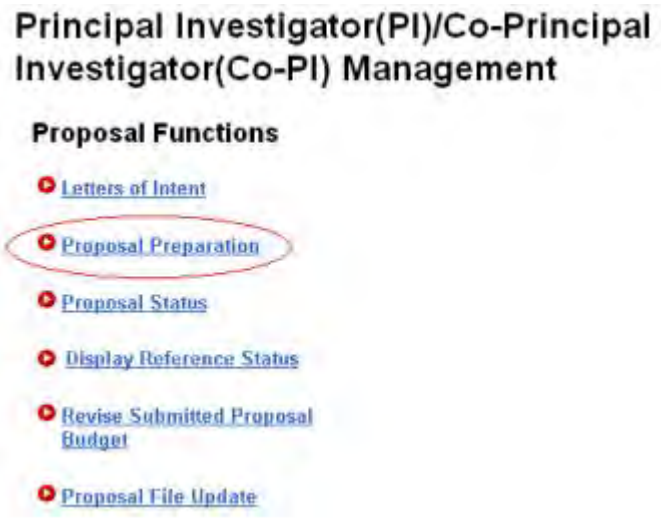


Figure 4 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Proposal Functions screen. The Proposal Preparation link is circled.

5. Click **Proposal Preparation** (Figure 4). The **Principal Investigator (PI) Information** screen displays (Figure 5).

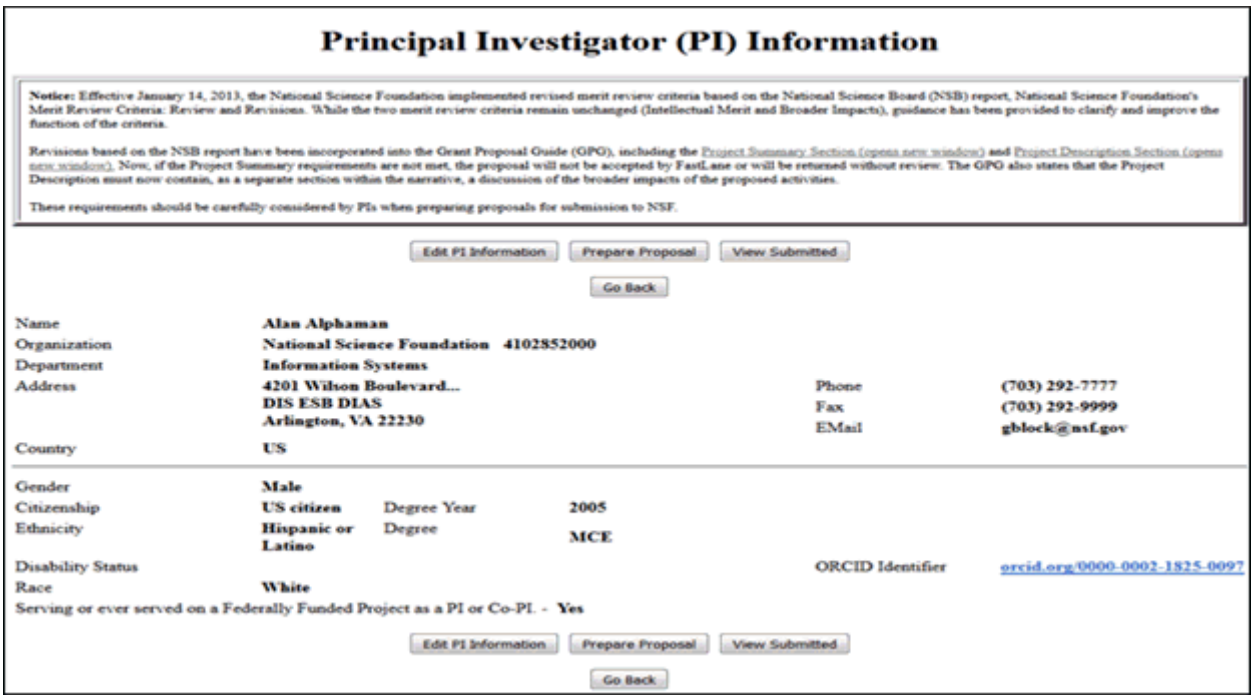


Figure 5 Principal Investigator (PI) Information screen. The Prepare Proposal button is circled.

6. Click the **Prepare Proposal** button (Figure 5). The **Proposal Actions** screen displays (Figure 6).

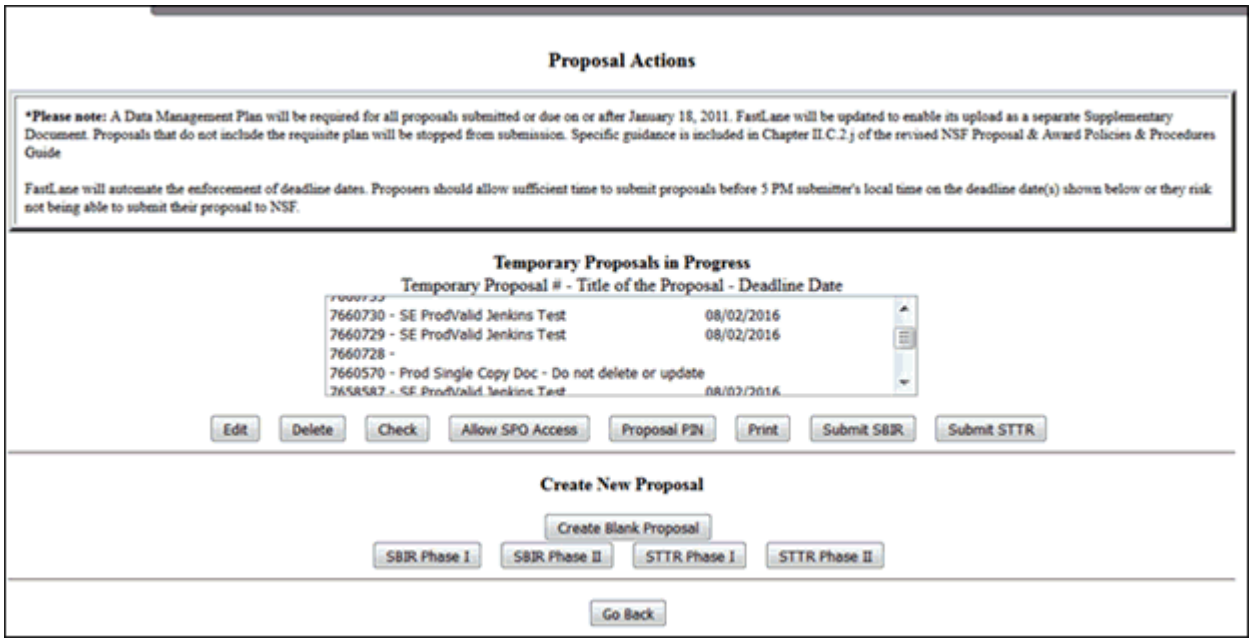


Figure 6 Proposal Actions screen. The Proposal PIN button is circled.

7. Highlight the number of the proposal (Figure 6) that you want to create a PIN a for.
8. Click the **Proposal PIN** button (Figure 6). The **Proposal PIN Control** screen displays (Figure 7).

Figure 7 Proposal PIN Control screen. The OK button is circled.

9. In the boxes (Figure 7), type the four-digit PIN you want to give the proposal.
10. Click the **OK** button (Figure 7). A screen displays (Figure 8) with the confirmation message that the proposal has been assigned the PIN you have given it.

Figure 8 Screen confirming that the proposal has a new PIN.

For Awarded Projects

Manage Participation for Awarded Projects

The PI coordinates the participation of Co-PIs, Non-Co-PI Senior Personnel, and OAUs on a project that NSF has awarded. The PI can do the following to manage participation in an awarded project:

- Add or change Co-PIs on a project
- Withdraw a Co-PI from a project
- Assign or change the award PIN to enable an OAU to work on a project report
- Add or delete non-Co-PI Senior Personnel as part of an:
  - Addition of Subaward Request
  - PI Transfer Request
  - Supplemental Funding Request

To enable a Senior Person to work on a project report, communicate to the individual the following:

- Award PIN
- Award Number

Manage Participation for Awarded Projects

The PI coordinates the participation of Co-PIs, Non-Co-PI Senior Personnel, and OAUs on a project that NSF has awarded. The PI can do the following to manage participation in an awarded project:

- Add or change Co-PIs on a project
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- Assign or change the award PIN to enable an OAU to work on a project report
- Add or delete non-Co-PI Senior Personnel as part of an:
  - Addition of Subaward Request
  - PI Transfer Request
  - Supplemental Funding Request

To enable a Senior Person to work on a project report, communicate to the individual the following:

- Award PIN
- Award Number

Add or Delete Senior Personnel for an Addition of Subaward Request

1. On the **FastLane Home Page** screen (Figure 1), click **Proposals, Awards, and Status**. The **Proposals, Awards, and Status** screen displays (Figure 2).

Figure 1 FastLane Home Page screen. The Proposals, Awards, and Status link is circled.

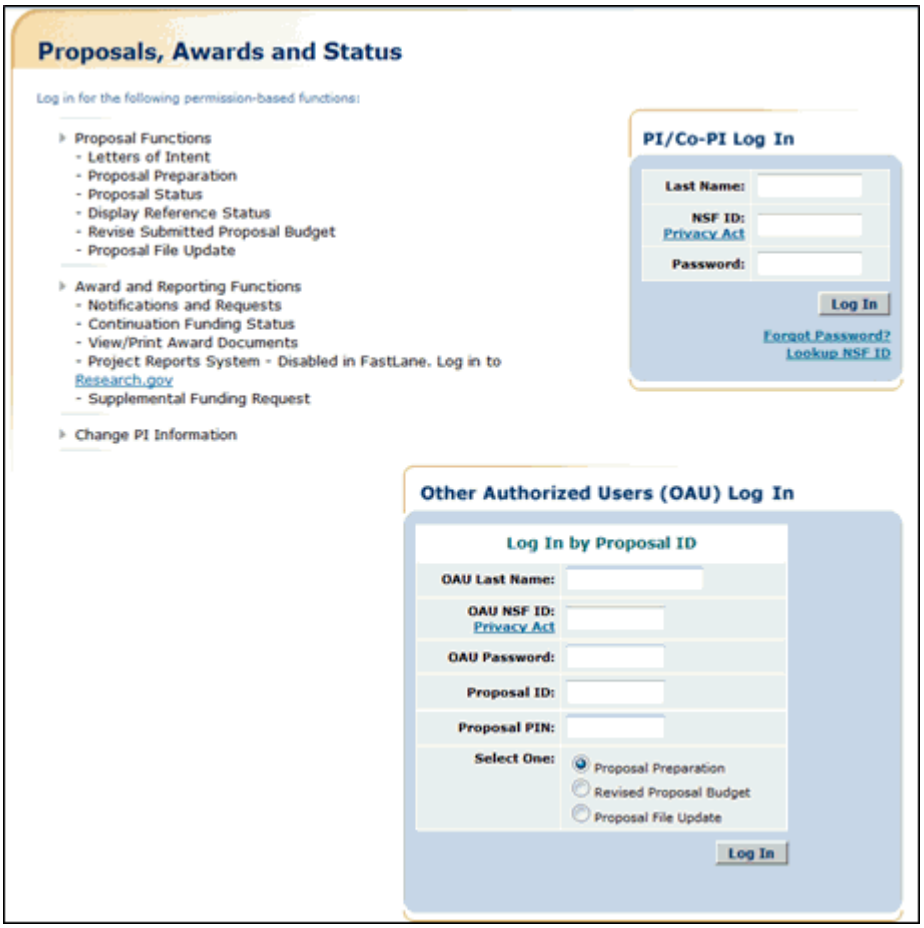


Figure 2 Proposals, Awards, and Status screen. The PI/Co-PI Log In area is circled.

2. In the **PI/Co-PI** section (Figure 1), type the following:
   - Your last name
   - Your National Science Foundation Identification (NSF ID) number
   - Your password
3. Click the **Log In** button (Figure 2). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management** screen displays (Figure 3).

Figure 3 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management screen. The Award and Reporting Functions link is circled.

4. Click **Award and Reporting Functions** (Figure 3). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Award and Reporting Functions** screen displays (Figure 4).

Figure 4 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management screen. The Notifications and Requests link is circled.

5. Click **Notifications and Requests** (Figure 4). The **Notifications and Requests** screen displays (Figure 5).

Figure 5 Notifications and Requests screen. The link to an Addition of Subaward link is circled.

6. Find the Addition of Subaward Request in the **Works in Progress** section (Figure 5).
7. Click **Addition of Subaward** (Figure 5) in the row for the Addition of Subaward for which you want to add or delete a Senior Person. The **Form Preparation** screen displays (Figure 6).

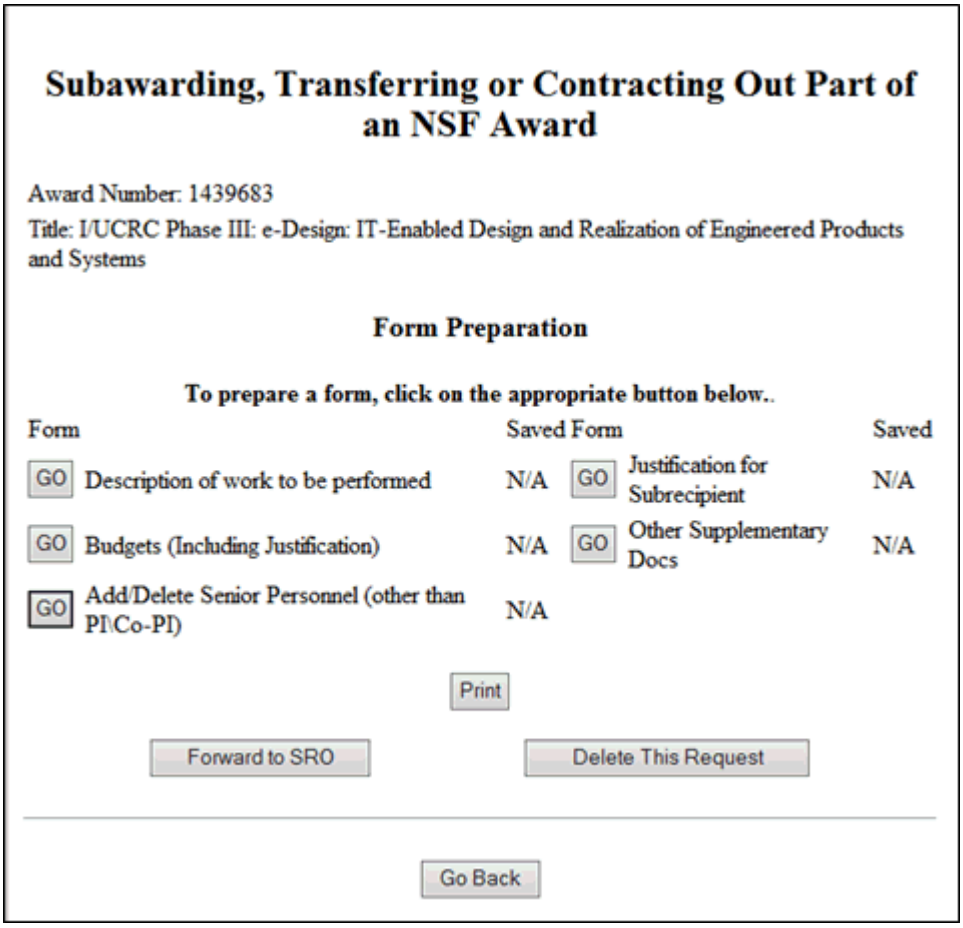


Figure 6 Addition of Subaward Form Preparation screen. The Go button for Add/Delete Senior Personnel (other than PI/Co-PI) is circled.

8. Click the **Go** button (Figure 6) for Add/Delete Non-Co-PI Senior Personnel. The **Add/Delete Non-Co-Principal Investigator (Co-PI) Senior Personnel Assigned to Proposal** screen displays (Figure 7). On the **Add/Delete Non-Co-Principal Investigator (Co-PI) Senior Personnel Assigned to Proposal** screen, you can do either one of the following, or both:
   - Add a Senior Person
   - Delete a Senior Person

Figure 7 Add/Delete Non-Co-Principal Investigator (Co-PI) Senior Personnel Assigned to Proposal screen. The Add Non-Co-PI Senior Person to Proposal button is circled.

Add a Senior Person

1. On the **Add/Delete Non-Co-Principal Investigator (Co-PI) Senior Personnel Assigned to Proposal** screen (Figure 7), type the individual's first and last name and middle initial in the appropriate boxes.
2. Click the **Add Non-Co-PI Senior Person to Proposal** button (Figure 7). The **Add/Delete Non-Co-Principal Investigator (Co-PI) Senior Personnel Assigned to Proposal** screen displays (Figure 8) with the individual listed as a Senior Person. The individual is also now listed on the **Budget Personnel** screen (Figure 9) as a Senior Person for whom funds may be allocated.

Figure 8 Add/Delete Non-Co-Principal Investigator (Co-PI) Senior Personnel Assigned to Proposal screen. The newly added Senior Person's name now appears in the list of Senior Personnel.

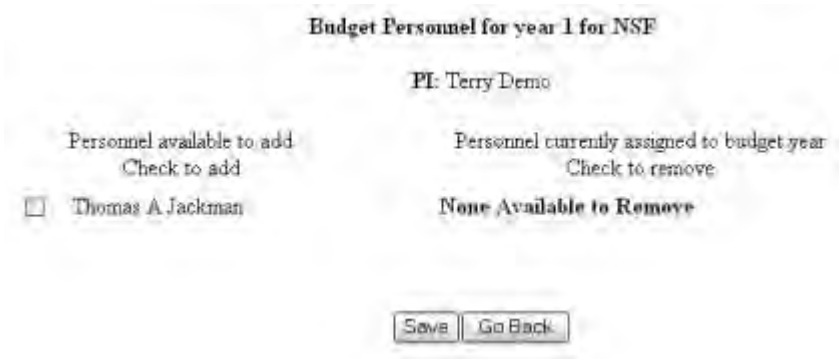


Figure 9 Budget Personnel screen. The name of the newly added Senior Person is listed for addition if necessary as a person for whom funds may be allocated.

Delete a Senior Person

1. On the **Add/Delete Non-Co-Principal Investigator (Co-PI) Senior Personnel Assigned to Proposal** screen (Figure 10), highlight the name of the Senior Person that you want to remove.

Figure 10 Add/Delete Non-Co-Principal Investigator (Co-PI) Senior Personnel Assigned to Proposal screen. The Delete Non-Co-PI Senior Person from Proposal button is circled.

2. Click the **Delete Non-Co-PI Senior Personnel from Proposal** button (Figure 10). A screen displays (Figure 11) with a message for you to confirm that you want to remove the Senior Person.

Figure 11 Screen with a message for you to confirm that you want to remove the Senior Person.

3. Click the **OK** button (Figure 11). A screen displays (Figure 12) confirming that the Senior Person has been removed.

Figure 12 Screen with the message that the Senior Person has been removed.

Add or Delete Senior Personnel for a PI Transfer Request

1. On the **FastLane Home Page** screen (Figure 1), click **Proposals, Awards, and Status**. The **Proposals, Awards, and Status** screen displays (Figure 2).

Figure 1 FastLane Home Page screen. The Proposals, Awards, and Status link is circled.

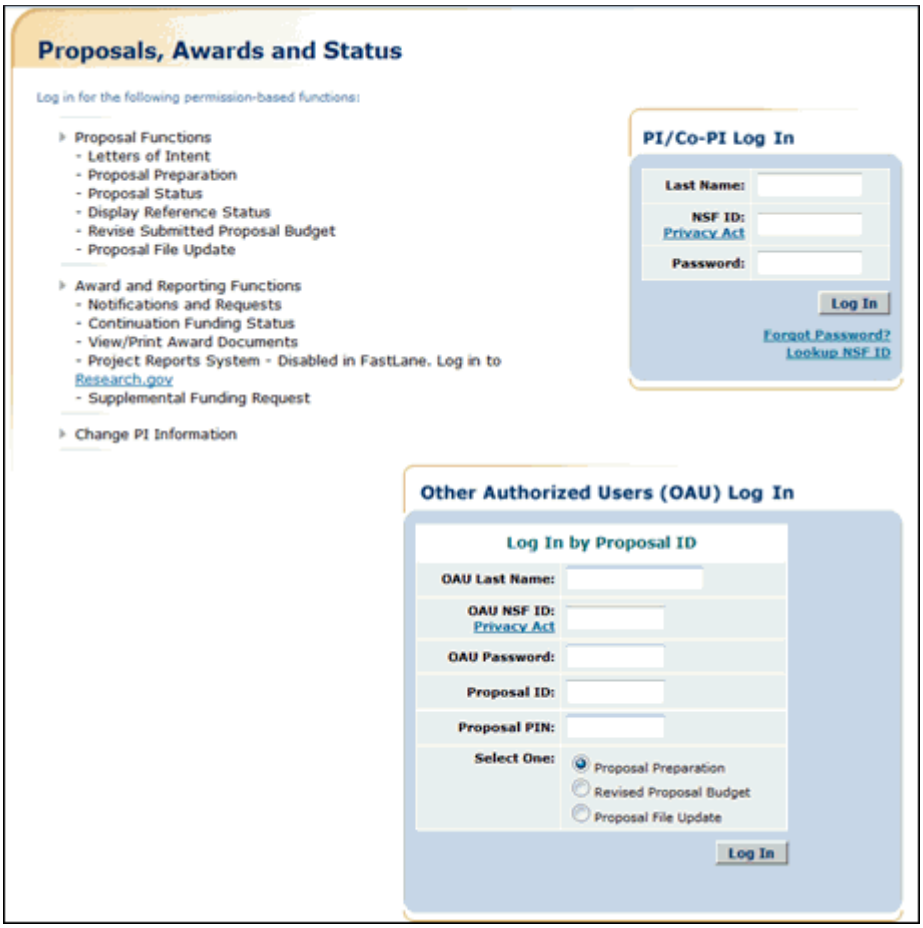


Figure 2 Proposals, Awards, and Status screen. The PI/Co-PI Log In area is circled.

2. In the **PI/Co-PI** section (Figure 1), type the following:
   - Your last name
   - Your National Science Foundation Identification (NSF ID) number
   - Your password
3. Click the **Log In** button (Figure 2). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management** screen displays (Figure 3).

Figure 3 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management screen. The Award and Reporting Functions link is circled.

4. Click **Awards and Reporting Functions** (Figure 3). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Award and Reporting Functions** screen displays (Figure 4).

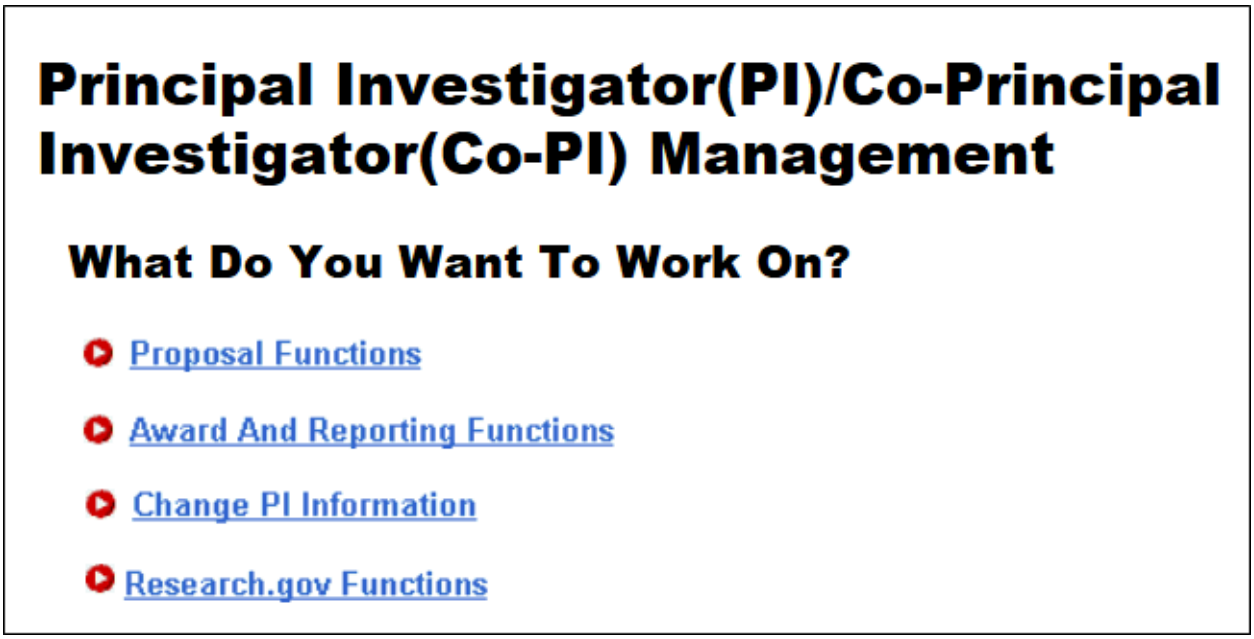
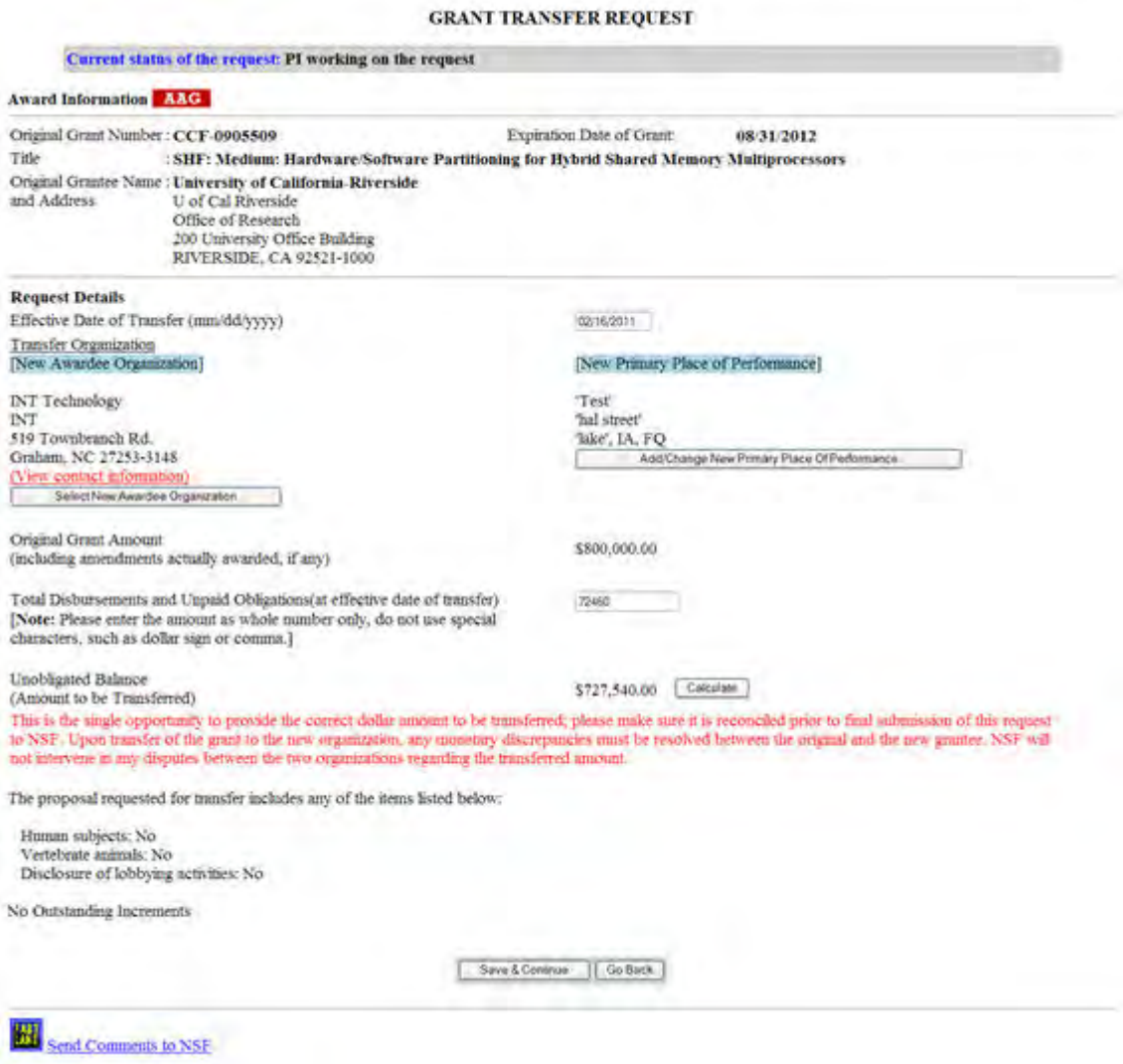


Figure 4 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Award and Reporting Functions screen.

5. Click **Notifications and Requests** (Figure 4). The **Notifications and Requests** screen displays (Figure 5).

Figure 5 Notifications and Requests screen. The PI Transfer link is circled for an award.

6. Click **PI Transfer** (Figure 5) on the row for the award you want to add or delete a Senior Person. The **Grant Transfer Request** screen displays (Figure 6).



GRANT TRANSFER REQUEST

Current status of the request: PI working on the request

Award Information AAG

Original Grant Number : CCF-0905509 Expiration Date of Grant: 08/31/2012

Title : SHF: Medium: Hardware/Software Partitioning for Hybrid Shared Memory Multiprocessors

Original Grantee Name and Address : University of California-Riverside
U of Cal Riverside
Office of Research
200 University Office Building
RIVERSIDE, CA 92521-1000

Request Details

Effective Date of Transfer (mm/dd/yyyy) 02/16/2011

Transfer Organization
[New Awardee Organization]

INT Technology
INT
519 Townbranch Rd.
Graham, NC 27253-3148
(View contact information)
Select New Awardee Organization

[New Primary Place of Performance]

'Test'
'hal street'
'lake', IA, FQ
Add/Change New Primary Place Of Performance

Original Grant Amount
(including amendments actually awarded, if any) $800,000.00

Total Disbursements and Unpaid Obligations(at effective date of transfer) 72460
[Note: Please enter the amount as whole number only, do not use special characters, such as dollar sign or comma.]

Unobligated Balance
(Amount to be Transferred) $727,540.00 Calculate

This is the single opportunity to provide the correct dollar amount to be transferred; please make sure it is reconciled prior to final submission of this request to NSF. Upon transfer of the grant to the new organization, any monetary discrepancies must be resolved between the original and the new grantee. NSF will not intervene in any disputes between the two organizations regarding the transferred amount.

The proposal requested for transfer includes any of the items listed below:

Human subjects: No
Vertebrate animals: No
Disclosure of lobbying activities: No

No Outstanding Increments

Save & Continue Go Back

Send Comments to NSF

Figure 6 Grant Transfer Request screen.

7. Click the **Save and Continue** button (Figure 6). The **Click on a Link to Work** screen displays (Figure 7).

Figure 7 Click on a Link to Work screen. The Edit Transfer Request Forms link is circled.

8. Click **Edit Transfer Request Forms** (Figure 7). The **Form Preparation** screen displays (Figure 8).

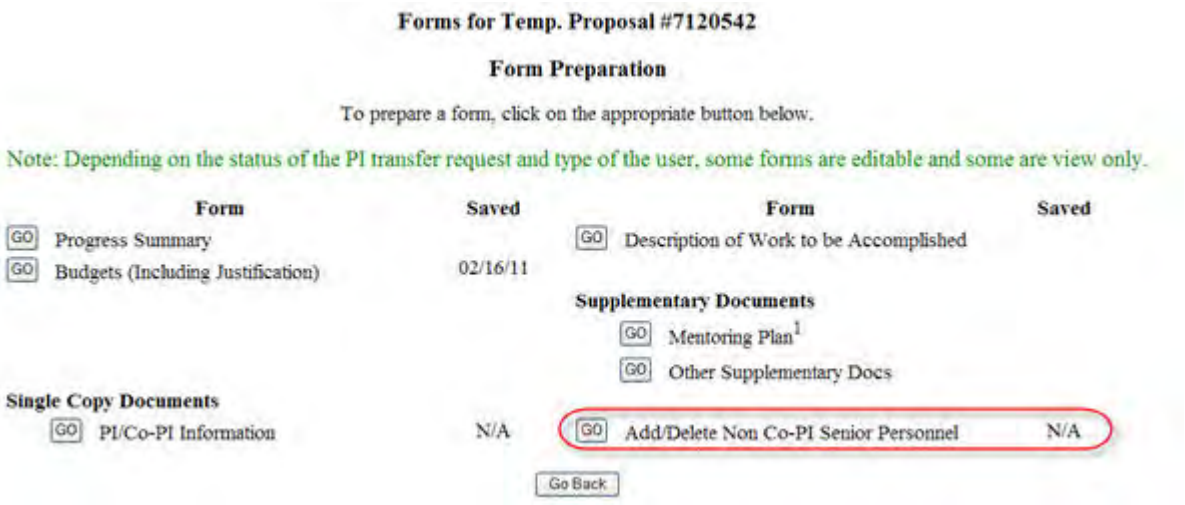


Figure 8 Form Preparation screen. The Go button for Add/Delete Non Co-PI Senior Personnel is circled.

9. On the **Form Preparation** screen, click the **Go** button for Add/Delete Non Co-PI Senior Personnel (Figure 8). The **Add/Delete Non Co-Principal Investigator (Co-PI) Senior Personnel Assigned to Proposal** screen displays (Figure 9). On this screen, you can do either one or both of the following:
   - Add a Senior Person
   - Delete a Senior Person

Figure 9 Add/Delete Non-Co-Principal Investigator (Co-PI) Senior Personnel Assigned to Proposal screen. The Add Non-Co-PI Senior Person to Proposal button is circled.

Add a Senior Person

1. On the **Add/Delete Non-Co-Principal Investigator (Co-PI) Senior Personnel Assigned to Proposal** screen (Figure 9), type the individual's first and last name and middle initial in the appropriate boxes.
2. Click the **Add Non-Co-PI Senior Person to Proposal** button (Figure 9). The **Add/Delete Non-Co-Principal Investigator (Co-PI) Senior Personnel Assigned to Proposal** screen displays (Figure 10) with the individual listed as a Senior Person. The individual is also now listed on the **Budget Personnel** screen (Figure 10) as a Senior Person for whom funds can be allocated.

Figure 10 Add/Delete Non-Co-Principal Investigator (Co-PI) Senior Personnel Assigned to Proposal screen. The newly added Senior Person's name now appears in the list of Senior Personnel.

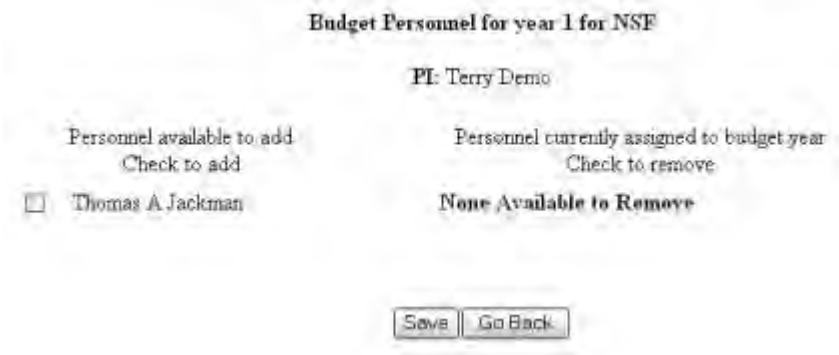


Figure 11 Budget Personnel screen. The name of the newly added Senior Person is listed for addition if necessary as a person for whom funds are to be allocated.

Delete a Senior Person

1. On the **Add/Delete Non-Co-Principal Investigator (Co-PI) Senior Personnel Assigned to Proposal** screen (Figure 12), highlight the name of the Senior Person that you want to remove.

Figure 12 Add/Delete Non-Co-Principal Investigator (Co-PI) Senior Personnel Assigned to Proposal screen. The Delete Non-Co-PI Senior Person from Proposal button is circled.

2. Click the **Delete Non-Co-PI Senior Personnel from Proposal** button (Figure 12). A screen displays (Figure 13) with a message for you to confirm that you want to remove the Senior Person.

Figure 13 Screen with a message for you to confirm that you want to remove the Senior Person.

3. Click the **OK** button (Figure 13). A screen displays (Figure 14) confirming that the Senior Person has been removed from the proposal.

Figure 14 Screen with the message that the Senior Person has been removed.

Add or Delete Senior Personnel for a Supplementary Funding Request

1. On the **FastLane Home Page** screen (Figure 1), click **Proposals, Awards, and Status**. The **Proposals, Awards, and Status** screen displays (Figure 2).

Figure 1 FastLane Home Page screen. The Proposals, Awards, and Status link is circled.

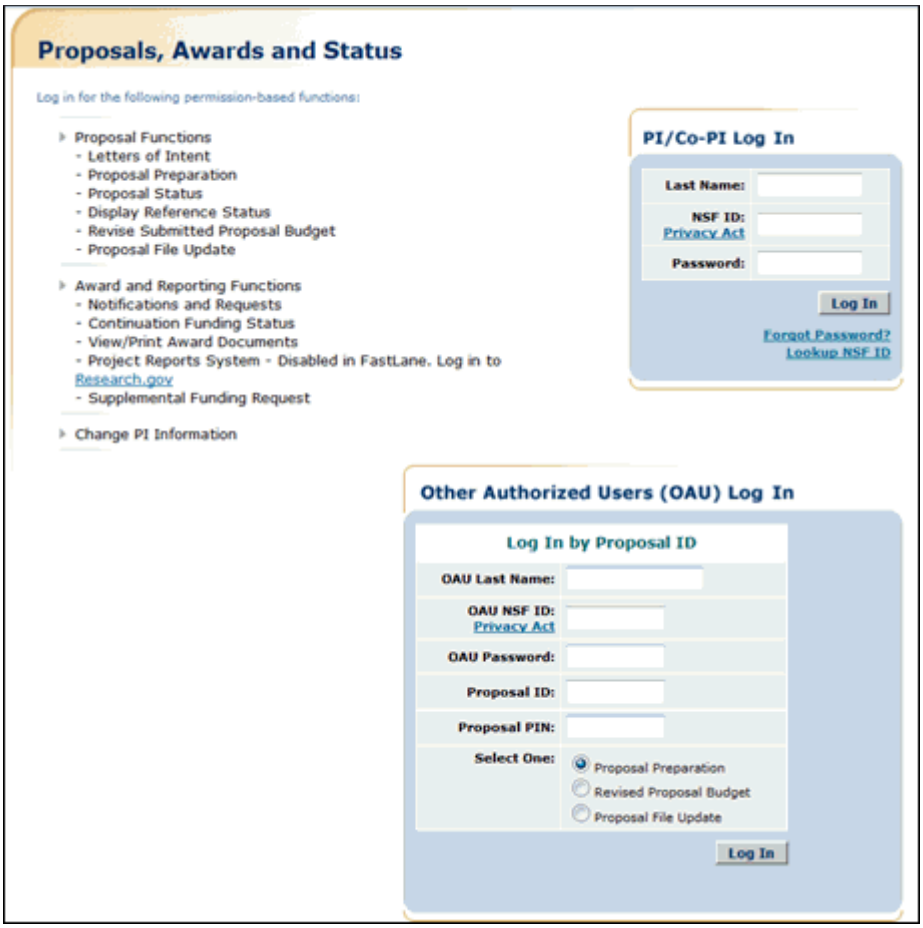


Figure 2 Proposals, Awards, and Status screen. The PI/Co-PI Log In area is circled.

2. In the **PI/Co-PI** section (Figure 2), type the following:
   - Your last name
   - Your National Science Foundation Identification (NSF ID) number
   - Your password
3. Click the **Log In** button (Figure 2). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management** screen displays (Figure 3).

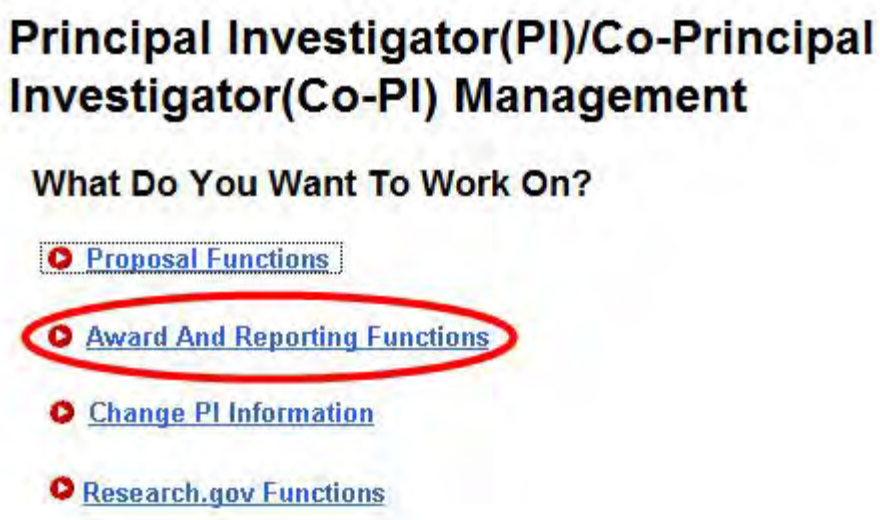


Figure 3 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management screen. The Award and Reporting Functions link is circled.

4. Click **Awards and Reporting Functions** (Figure 3). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Award and Reporting Functions** screen displays (Figure 4).

Figure 4 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Award and Reporting Functions screen. The Supplemental Funding Request link is circled.

5. Click **Supplemental Funding Request** (Figure 4). The **List of Current Awards** screen displays (Figure 5).

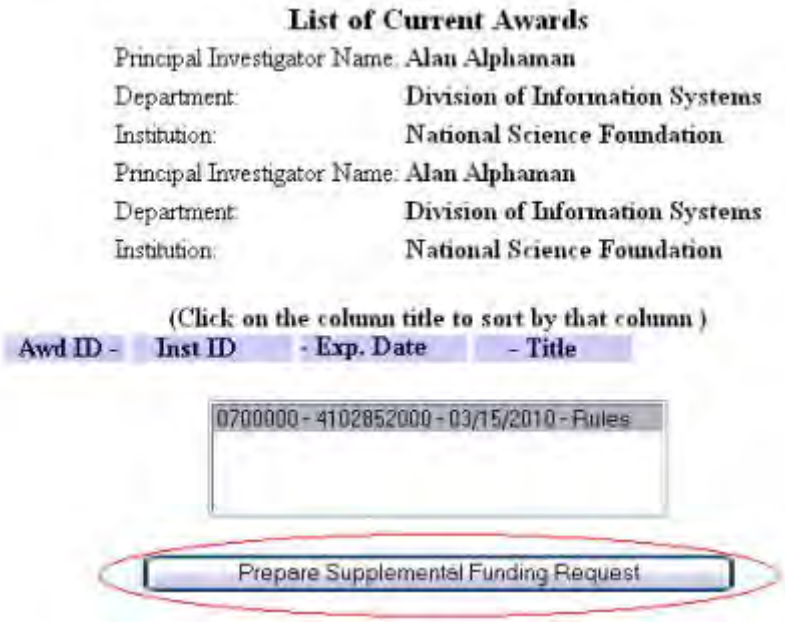


Figure 5 List of Current Awards screen. The Prepare Supplemental Funding Request button is circled.

6. Highlight the award that the Supplemental Funding Request is for (Figure 5).
7. Click the **Prepare Supplemental Funding Request** button (Figure 5). The **Request for Supplemental Funding** screen displays (Figure 6).

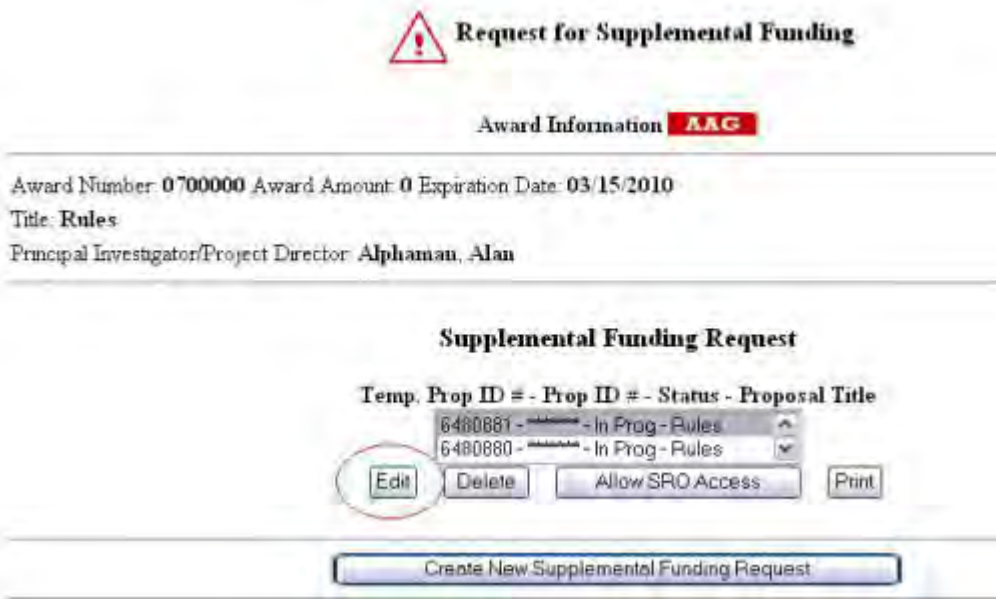


Figure 6 Request for Supplemental Funding screen. The Edit button is circled.

8. Highlight the Supplemental Funding Request that you want to add or delete a Senior Person for (Figure 6).
9. Click the **Edit** button (Figure 6). The **Form Preparation** screen displays (Figure 7).

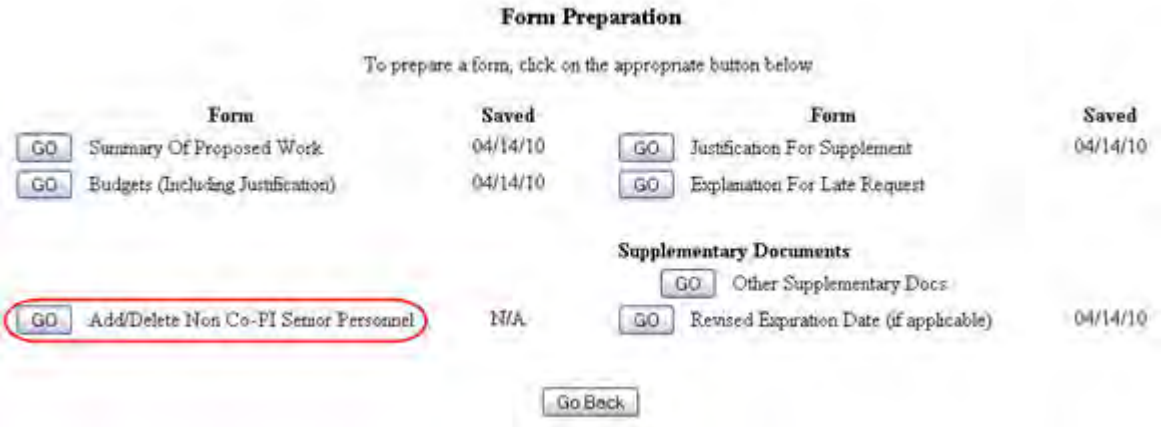


Figure 7 Form Preparation screen. The Add/Delete Non-Co-PI Senior Personnel button is circled.

10. Click the **Add/Delete Non-Co-PI Senior Personnel** button (Figure 7). The **Add/Delete Non-Co-Principal Investigator (Co-PI) Senior Personnel Assigned**

to Proposal screen displays (Figure 8). On this screen you can do either one or both of the following:

- Add a Senior Person
- Delete a Senior Person

Figure 8 Add/Delete Non-Co-Principal Investigator (Co-PI) Senior Personnel Assigned to Proposal screen.

Add a Senior Person

1. On the **Add/Delete Non-Co-Principal Investigator (Co-PI) Senior Personnel Assigned to Proposal** screen (Figure 8), type the individual's first and last name and middle initial in the appropriate boxes.
2. Click the **Add Non-Co-PI Senior Person to Proposal** button (Figure 8). The Add/Delete Non-Co-Principal Investigator (Co-PI) Senior Personnel Assigned to Proposal screen displays (Figure 9) with the individual listed as a Senior Person.

Figure 9 Add/Delete Non-Co-Principal Investigator (Co-PI) Senior Personnel Assigned to Proposal screen. The individual's name now displays as a Senior Person.

Delete a Senior Person

1. On the **Add/Delete Non-Co-Principal Investigator (Co-PI) Senior Personnel Assigned to Proposal** screen (Figure 10), highlight the name of the Senior Person that you want to remove.

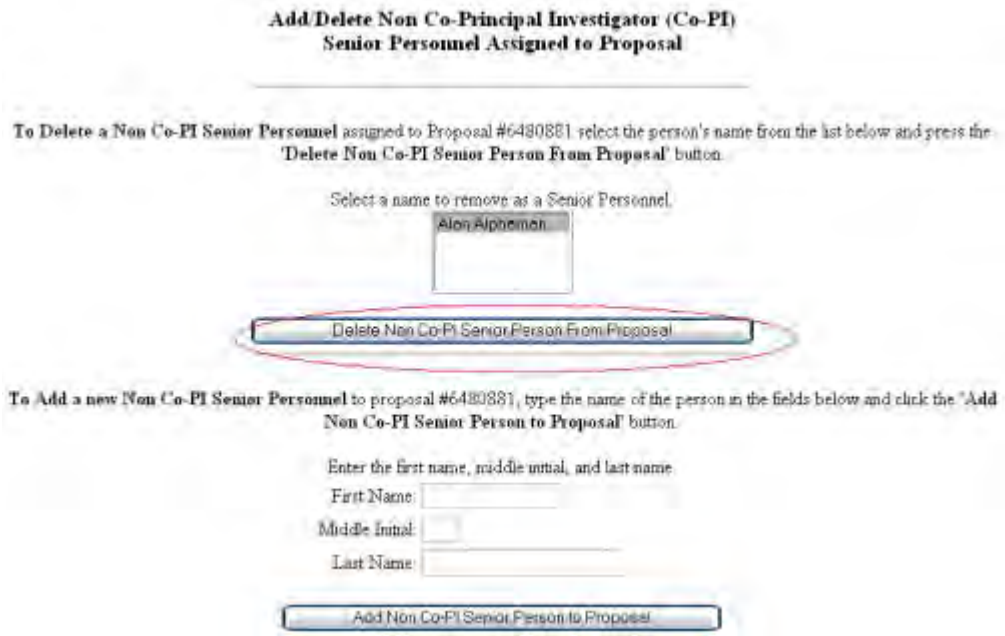


Figure 10 Add/Delete Non-Co-Principal Investigator (Co-PI) Senior Personnel Assigned to Proposal screen. The Delete Non-Co-PI Senior Person from Proposal button is circled.

2. Click the **Delete Non-Co-PI Senior Personnel from Proposal** button (Figure 10). A screen displays (Figure 11) with a message for you to confirm that you want to remove the Senior Person.

Figure 11 Screen with the message for you to confirm that you want to delete the Senior Person. The OK button is circled.

3. Click the **OK** button (Figure 11). A screen displays (Figure 12) confirming that the Senior Person has been removed.

Figure 12 Screen with the confirmation that the Senior Person has been deleted.

Project Reporting

As of January 2013, project reporting has transitioned to Research.gov. All final, annual, and interim project reporting must be prepared and submitted in Research.gov. To view instructions on how to complete a project report, please use the following link:

Research.gov Accessing Project Reporting

Update PI Information and Status

Update NSF on Your PI Information and Status

The PI also communicates to NSF about any changes in his or her status. The PI can do the following in FastLane:

- Prepare a PI Transfer request to request that the project be transferred to a new organization
- Designate a Co-PI as the PI on a project and become a Co-PI on the project
- Prepare a Withdrawal of PI Request to withdraw from a project
-

At any time, you can update your personal information on file with NSF.

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At any time, you can update your personal information on file with NSF.

Update PI Information

Update the PI Information Introduction

As a PI, through FastLane, you can update and change the information that NSF has on file for you. You may not change the name but can change any other information on the form.

The following types of information are optional but are useful to NSF in tracking the distribution of grants and awards (see Security and Privacy):

- Gender
- Disability
- Ethnicity
- Race
- Citizenship

To update the PI information, see Access the Edit Principal Investigator Screen for instructions.

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- Gender
- Disability
- Ethnicity
- Race
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To update the PI information, see Access the Edit Principal Investigator Screen for instructions.

Access the Edit Principal Investigator's (PI) Information Screen

To change your PI information, you must access the **Principal Investigator (PI) Information** screen. You can access the **Principal Investigator (PI) Information** screen from either of the following:

- The Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management screen
- Proposal Preparation

From the Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Screen

1. On the **FastLane Home Page** screen, log in to Proposals, Awards, and Status as a PI (see PI/Co-PI Login). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management** screen displays (Figure 1).

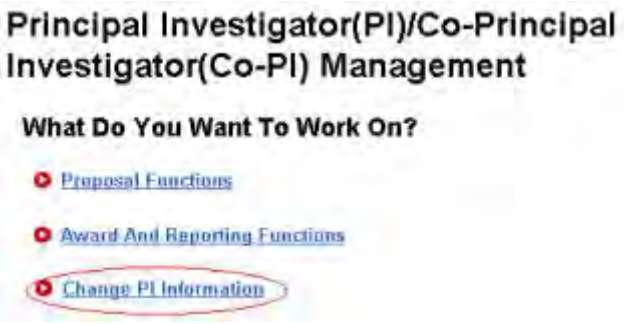

Figure 1 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management screen. The Change PI Information link is circled.

2. Click **Change PI Information** (Figure 1). The **Principal Investigator (PI) Information** screen displays (Figure 2).

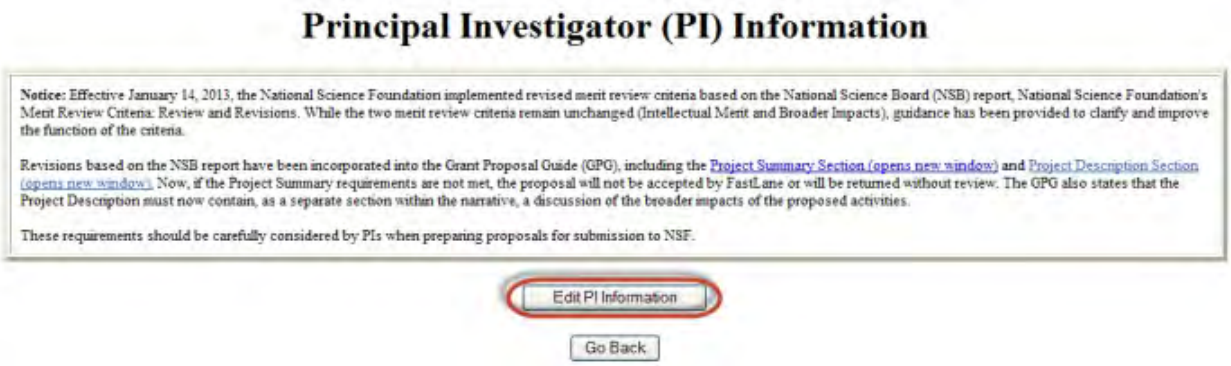

Figure 2 Principal Investigator (PI) Information screen. The Edit PI Information button is circled.

3. Click the **Edit PI Information** button (Figure 2). **The Edit Principal Investigator's (PI) Information** screen displays (Figure 3). See Edit PI Information for instructions for working on this screen.

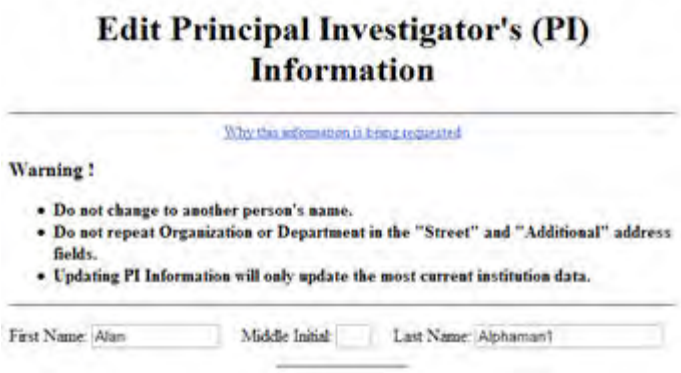

Figure 3 Edit Principal Investigator's (PI) Information screen.

From Proposal Preparation

1. On the **FastLane Home Page** screen, log in to Proposals, Awards, and Status as a PI (see PI/Co-PI Login). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management** screen displays (Figure 4).

Figure 4 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management screen. The Proposal Functions link is circled.

2. Click **Proposal Functions** (Figure 4). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Proposal Functions** screen displays (Figure 5).

Figure 5 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Proposal Functions screen. The Proposal Preparation link is circled.

3. Click **Proposal Preparation** (Figure 5). The **Principal Investigator (PI) Information** screen displays (Figure 6).

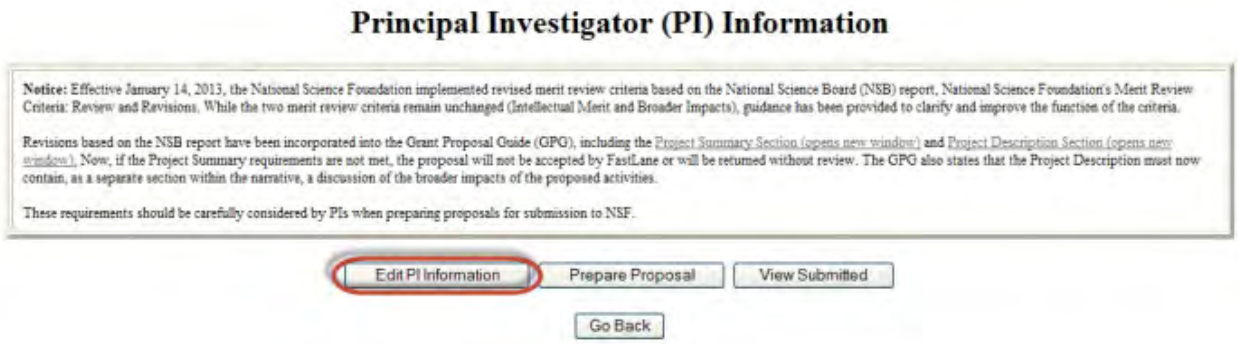

Figure 6 Principal Investigator (PI) Information screen. The Edit PI Information button is circled.

4. Click the **Edit PI Information** button (Figure 6). The **Edit Principal Investigator's (PI) Information** screen displays (Figure 7). See Edit PI Information for instructions for working on this screen.

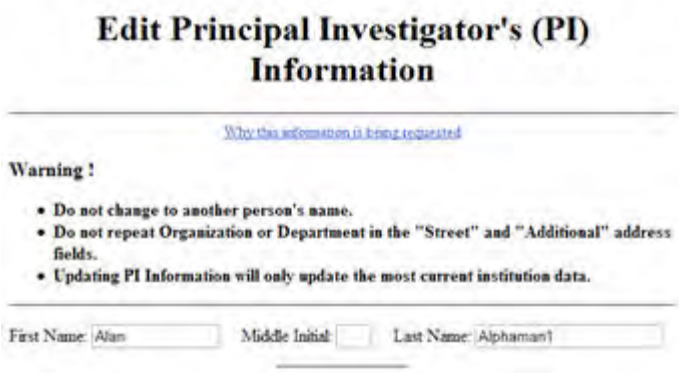

Figure 7 Edit Principal Investigator's (PI) Information screen.

Edit the PI Information

1. Access the **Edit Principal Investigator's (PI) Information** screen (Figure 1) (see Access the Edit Principal Investigator's (PI) Information Screen).

Figure 1 Edit Principal Investigator's (PI) Information screen. The Change Institution button is circled.

2. To change your organization, click the **Change Institution** button (Figure 1). The **Institution Search** screen displays (Figure 2).

Figure 2 Institution Search screen.

3. Select the search type option (Figure 2):
   - **Begins with** returns all organizations whose name begins with the text entered.
   - **Ends with** returns all organizations whose name ends with the text entered.
   - **Contains** returns all organizations whose name contains the text entered.
4. Enter the string (at least three characters) to search for (Figure 2).
5. Click the **Locate** button (Figure 2). The **Institution Search** screen displays (Figure 3).

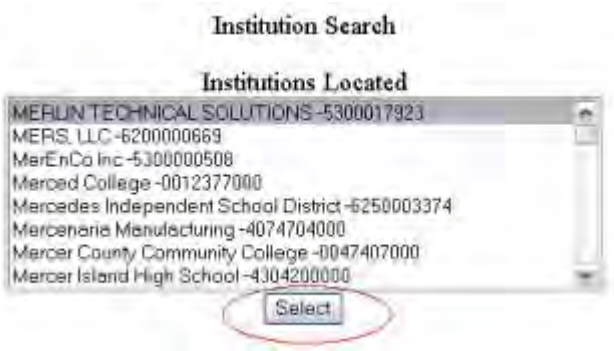

Figure 3 Institution Search screen. The Select button is circled.

6. Highlight the organization in the **Institutions Located** list (Figure 3).
7. Click the **Select** button (Figure 3). The **Edit Principal Investigator's (PI) Information** screen displays (Figure 1) with the name of the selected organization and the Institution Identification Number displaying in the appropriate boxes.
8. On the **Edit Principal Investigator's (PI) Information** screen (Figure 4), when you are finished changing the PI information, click the **Save Changes** button. A screen displays (Figure 5) with confirmation that the PI Information has been saved unless the PI is part of multiple institutions.

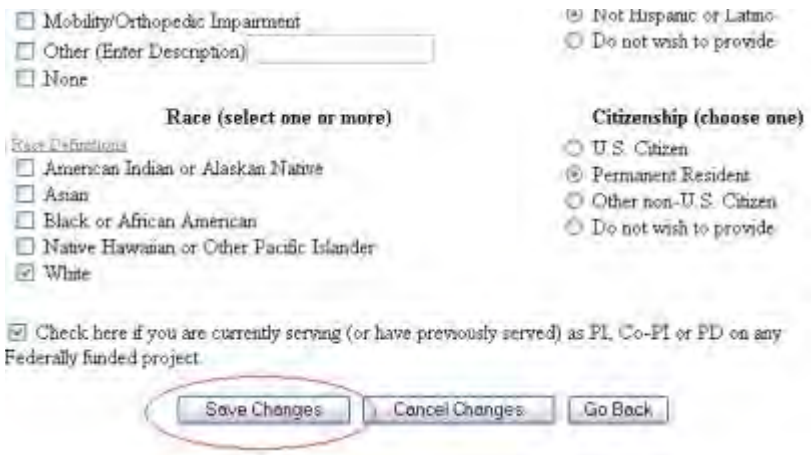

Figure 4 Lower portion of the Edit Principal Investigator's (PI) Information screen. The Save Changes button is circled.

Figure 5 Screen with the message that the changed PI information has been saved.

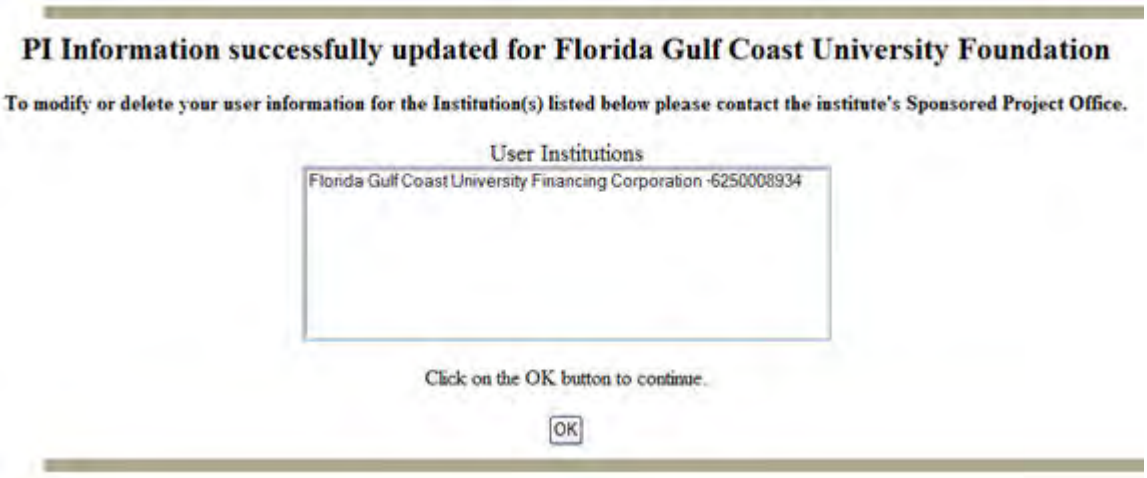

Figure 6 Screen with message about changing institutions if the PI is part of several.

9. Click the **OK** button (Figure 5 or Figure 6). The **Principal Investigator (PI) Information** screen displays (Figure 7).

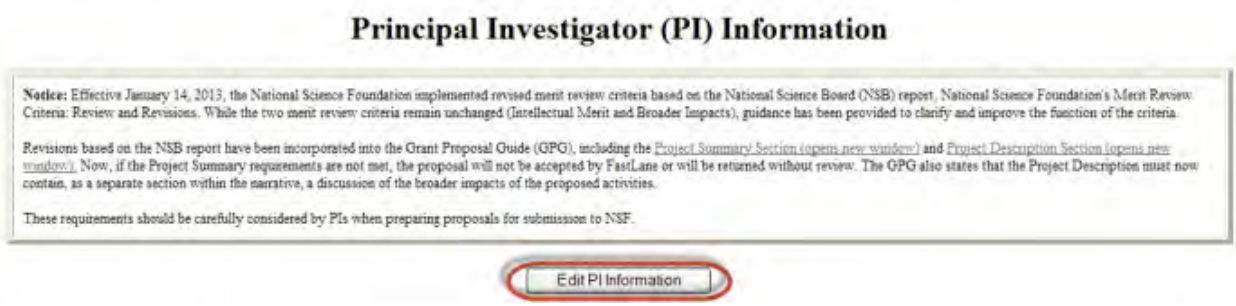

Figure 7 Principal Investigator (PI) Information screen.

Proposal Review

Proposal Review Introduction

Print the contents of the Proposal Review book.

The National Science Foundation strives to invest in a robust and diverse portfolio of projects that creates new knowledge and enables breakthroughs in understanding across all areas of science and engineering research and education. To identify which projects to support, NSF relies on a merit review process that incorporates consideration of both the technical aspects of a proposed project and its potential to contribute more broadly to advancing NSF's mission "to promote the progress of science; to advance the national health, prosperity, and welfare; to secure the national defense; and for other purposes." NSF makes every effort to conduct a fair, competitive, transparent merit review process for the selection of projects. Reviews play a key role in our evaluation of research proposals.

NSF has identified Merit Review Principles that provide the basis and context for the Merit Review Criteria. We ask that these principles be given due diligence by reviewers when reviewing and evaluating proposals.

Prepare and submit your proposal review through FastLane. In the Proposal Review Form, we ask for you to do the following:

- Provide an overall rating of the proposal.
- Comment in detail on the quality of the proposal, identifying the proposal's strengths and weaknesses for each NSF Merit Review Criterion:
  - The intellectual merit of the proposed activity
  - The broader impacts of the proposed activity

  The following elements should be considered in the review for both criteria:

  1. What is the potential for the proposed activity to:
     a. advance knowledge and understanding within its own field or across different fields (Intellectual Merit); and

     b. benefit society or advance desired societal outcomes (Broader Impacts)?

  2. To what extent do the proposed activities suggest and explore creative, original, or potentially transformative concepts?

  3. Is the plan for carrying out the proposed activities well-reasoned, well-organized, and based on a sound rationale? Does the plan incorporate a mechanism to assess success?

  4. How well qualified is the individual, team, or institution to conduct the proposed activities?

  5. Are there adequate resources available to the PI (either at the home institution or through collaborations) to carry out the proposed activities?

- Comment in detail on the quality of the proposal with respect to any additional solicitation-specific criteria, if applicable.

• Provide a summary statement that describes your overall assessment of the proposal based on the review criteria.

The Proposal Review Form also asks you to do the following:
• Indicate any potential conflicts of interest that you might have in evaluating the proposal (optional if no conflict of interest exists).
• Recommend any other qualified reviewers for this proposal (optional).

See Note to Reviewers of Career Proposals if you are reviewing a proposal for the NSF Careers Program.

As of reviewer, you are obligated to maintain the confidentiality of both the proposal you are reviewing and also your review.

To begin preparing a review, see Log In to Proposal Review and Prepare a Proposal Review.

Thank you for your help in evaluating a proposal. Reviews are important to NSF's evaluation of proposals and provide important feedback to the Principal Investigators. We appreciate the time and thought that go into preparing them.

Introduction

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NSF Merit Review Principles

Print the contents of the Proposal Review book.

These principles are to be given due diligence by PIs and organizations when preparing proposals and managing projects, by reviewers when reading and evaluating proposals, and by NSF program staff when determining whether or not to recommend proposals for funding and while overseeing awards. Given that NSF is the primary federal agency charged with nurturing and supporting excellence in basic research and education, the following three principles apply:

- All NSF projects should be of the highest quality and have the potential to advance, if not transform, the frontiers of knowledge.

- NSF projects, in the aggregate, should contribute more broadly to achieving societal goals. These "Broader Impacts" may be accomplished through the research itself, through activities that are directly related to specific research projects, or through activities that are supported by, but are complementary to, the project.1[1] The project activities may be based on previously established and/or innovative methods and approaches, but in either case must be well justified.

- Meaningful assessment and evaluation of NSF funded projects should be based on appropriate metrics, keeping in mind the likely correlation between the effect of broader impacts and the resources provided to implement projects. If the size of the activity is limited, evaluation of that activity in isolation is not likely to be meaningful. Thus, assessing the effectiveness of these activities may best be done at a higher, more aggregated, level than the individual project.

With respect to the third principle, even if assessment of Broader Impacts outcomes for particular projects is done at an aggregated level, PIs are expected to be accountable for carrying out the activities described in the funded project. Thus, individual projects should include clearly stated goals, specific descriptions of the activities that the PI intends to do, and a plan in place to document the outputs of those activities.

These three merit review principles provide the basis for the merit review criteria, as well as a context within which the users of the criteria can better understand their intent.

[1] NSF values the advancement of scientific knowledge and activities that contribute to the achievement of societally relevant outcomes. Such outcomes include, but are not limited to: full participation of women, persons with disabilities, and underrepresented minorities in science, technology, engineering, and mathematics (STEM); improved STEM education and educator development at any level; increased public scientific literacy and public engagement with science and technology; improved well-being of individuals in society; development of a diverse, globally competitive STEM workforce; increased partnerships between academia, industry, and others; improved

national security; increased economic competitiveness of the United States; and enhanced infrastructure for research and education.

NSF Merit Review Criteria for Proposals

Print the contents of the Proposal Review book.

When evaluating NSF proposals, reviewers should consider what the proposers want to do, why they want to do it, how they plan to do it, how they will know if they succeed, and what benefits could accrue if the project is successful. These issues apply both to the technical aspects of the proposal and the way in which the project may make broader contributions. To that end, reviewers are asked to evaluate all proposals against two criteria:

- **Intellectual Merit:** The intellectual Merit criterion encompasses the potential to advance knowledge; and
- **Broader Impacts:** The Broader Impacts criterion encompasses the potential to benefit society and contribute to the achievement of specific, desired societal outcomes.

The following elements should be considered in the review for both criteria:

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5. Are there adequate resources available to the PI (either at the home institution or through collaborations) to carry out the proposed activities?

Obligation for Confidentiality

Print the contents of the Proposal Review book.

For both *ad hoc* and panel reviewers:
NSF receives proposals in confidence and protects the confidentiality of their contents. As a reviewer, you are obligated to maintain the confidentiality of both the proposal you are reviewing and also of your review.

Please observe the following practices to maintain this confidentiality:

- Do not copy, quote from, or otherwise use or disclose to anyone, including your graduate students or postdoctoral or research associates, any material from any proposal you are asked to review.

- If you believe a colleague can make a substantial contribution to the review, please obtain permission from the NSF Program Officer *before* disclosing either the contents of the proposal or the name of any proposer or Principal Investigator.
- When you have completed your review, *be certain to destroy the proposal*and/or delete any electronic correspondence or files related to the proposal.
- Safeguard the six-character alphanumeric PIN or the password that NSF has assigned to this proposal-reviewer or panel ID-panelist combination.

NSF keeps reviews and your identity as a reviewer of specific proposals confidential to the maximum extent possible, except that we routinely send to principal investigators (PI's) reviews of their own proposals without your name, affiliation, or other identifying information. Please respect the confidentiality of all principal investigators and of other reviewers.

Unauthorized disclosure of confidential information could subject you to administrative sanctions.

For panel reviewers:

Do not disclose the identities of principal investigators or other reviewers, the relative assessments or ranking of proposal by a merit review panel, or other details about the merit review of proposals.

As NSF protects the confidentiality of proposals and of reviewers, it is important that as a reviewer you do not reveal to others prior to, during or after a panel meeting, that you have served as a reviewer on a specific panel. It is, however, recognized that you may need to advise your supervisor as to your absence due to serving on a panel. And, you may wish to include on your personnel resume that you have served as a reviewer for NSF in a given year. This is allowable, but you should not indicate the specific dates of the panels on which you have served.

Potential Conflicts of Interest

Print the contents of the Proposal Review book.

For panel reviewers:

If you have an affiliation or financial connection with the organization or person submitting the proposal that might be construed as creating a conflict of interest, describe those affiliations or interests in the Conflict of Interest section under "Prepare Review", and contact the cognizant NSF Program Officer before completing the review.

An NSF Program Officer will examine any statement of affiliations or interests for the existence of a conflict of interest. If you do not include a statement of potential conflicts of interest, NSF assumes that you have no conflicting affiliations or interests.

In addition, you must complete the Conflict-of-Interest and Confidentiality Statement for NSF Panelists (NSF Form 1230P dated 11/2011).

For *ad hoc* reviewers:

If you have an affiliation or financial connection with the organization or person submitting the proposal that might be construed as creating a conflict of interest, describe those affiliations or interests in the Conflict of Interest section under "Prepare Review", and contact the cognizant NSF Program Officer before completing the review.

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Prepare and Submit Proposal Review

Log In to Proposal Review

1. On the **FastLane Home Page** screen (Figure 1), click **Proposal Review**. The **Proposal Review** screen displays (Figure 2).

Figure 1 FastLane Home Page screen. The Proposal Review link is circled.

Figure 2 Proposal Review screen. The Log In section and the Log In button are circled.

2. Read the Rules of Behavior (Figure 2). You signify your acceptance of the Rules of Behavior by logging in.
3. In the **Log In** section (Figure 2), do the following:
   - In the **Proposal Number** box, type the proposal number given to you by the NSF Program Officer.
   - In the **Reviewer Last Name** box, type your last name.
   - In the **Pin** box, type the proposal PIN given to you by the NSF Program Officer.
4. Click the **Login** button (Figure 2). The **Proposal Review** screen displays (Figures 3 through 8) with these options:
   - Prepare a review
   - View the proposal
   - Download and save the proposal
   - Have NSF print and mail the proposal to you
   - Have NSF make and mail a CD of the proposal to you
   - Edit your information on file with NSF
   - Add to or update your demographic information

Proposal Review

Reviewer Information	Edit
Name	Professor Brian Gleeson
Address	444 Wilson Boulevard Arlington, VA 22222
E-Mail	name@nsf.gov
Office Phone	(222) 333-4444

Proposal Information	
Proposal Number	0456629
Title	The Effect of Hydrogen and Water Vapor on the Oxidation of Chromia-Forming Alloys
Principal Investigator's Name	Jeffrey W Fergus
Institution	Auburn University

Demographic Information		Add/Update	
Race	N/A		
Ethnicity	N/A	Gender	Male
Citizenship	N/A	Disability	N/A

Figure 3 Proposal Review screen, Reviewer and Proposal Information section (upper portion of the screen).

Merit Review Criteria

Notice: Effective January 2013, the National Science Foundation implemented revised merit review criteria. While the two merit review criteria are unchanged (Intellectual Merit and Broader Impacts), guidance has been provided to clarify and improve the function of the criteria.

Please provide detailed comments on the quality of this proposal with respect to **each** of the two NSF Merit Review Criteria identified below, noting specifically the proposal's strengths and weaknesses. Both criteria are to be given full consideration during the review and decision making processes; each criterion is necessary but neither, by itself, is sufficient. Please provide comments with respect to any additional solicitation-specific review criteria, if applicable. Also, please enter a summary statement that describes your overall assessment of the proposal based on the review criteria.

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Figure 4 Merit Review Criteria section of the Proposal Review screen.

Your Potential Conflicts Of Interest

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Figure 5 Your Potential Conflicts of Interest section of the Proposal Review screen.

Your Obligation To Keep Proposals Confidential

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Figure 6 Your Obligation to Keep Proposals Confidential section of the Proposal Review screen.

NSF 11-1 January 2011

Privacy Act and Public Burden Statements

The information requested on proposal forms and project reports is solicited under the authority of the National Science Foundation Act of 1950, as amended. The information on proposal forms will be used in connection with the selection of qualified proposals; and project reports submitted by awardees will be used for program evaluation and reporting within the Executive Branch and to Congress. The information requested may be disclosed to qualified reviewers and staff assistants as part of the proposal review process; to proposer institutions/grantees to provide or obtain data regarding the proposal review process, award decisions, or the administration of awards; to government contractors, experts, volunteers and researchers and educators as necessary to complete assigned work; to other government agencies or other entities needing information regarding Proposers or nominees as part of a joint application review process, or in order to coordinate programs or policy; and to another Federal agency, court, or party in a court or Federal administrative proceeding if the government is a party. Information about Principal Investigators may be added to the Reviewer file and used to select potential candidates to serve as peer reviewers or advisory committee members. See Systems of Records, NSF-50, "Principal Investigator/Proposal File and Associated Records," 69 Federal Register 26410 (May 12, 2004), and NSF-51, "Reviewer/Proposal File and Associated Records," 69 Federal Register 26410 (May 12, 2004). Submission of the information is voluntary. Failure to provide full and complete information, however, may reduce the possibility of receiving an award.

An agency may not conduct or sponsor, and a person is not required to respond to, an information collection unless it displays a valid OMB control number. The OMB control number for this collection is 3145-0058. Public reporting burden for this collection of information is estimated to average 120 hours per response, including the time for reviewing instructions. Send comments regarding the burden estimate and any other aspect of this collection of information, including suggestions for reducing this burden, to:

Suzanne H. Plimpton

Reports Clearance Officer

Division of Administrative Services

National Science Foundation

Arlington, VA 22230

Figure 7 Privacy Act and Public Burden Statements section of the Proposal Review screen.

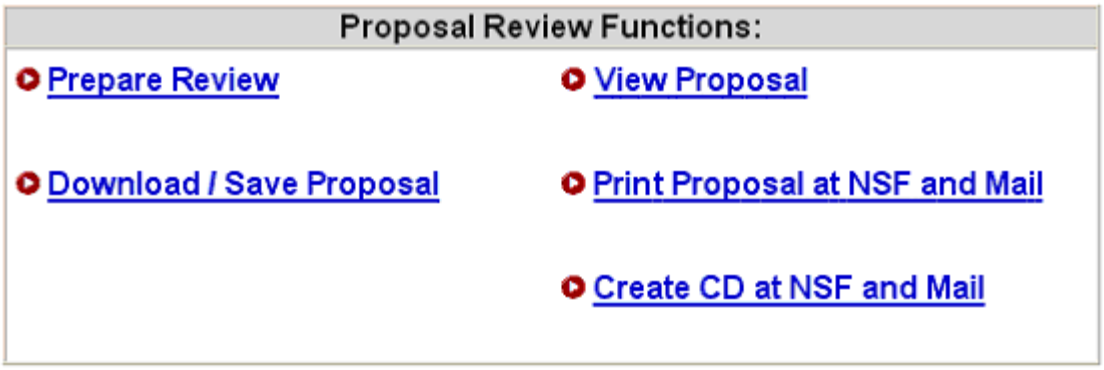

Figure 8 Proposal Review Functions section of the Proposal Review screen.

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Figure 4 Merit Review Criteria section of the Proposal Review screen.

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NSF 11-1 January 2011

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Arlington, VA 22230

Figure 7 Privacy Act and Public Burden Statements section of the Proposal Review screen.

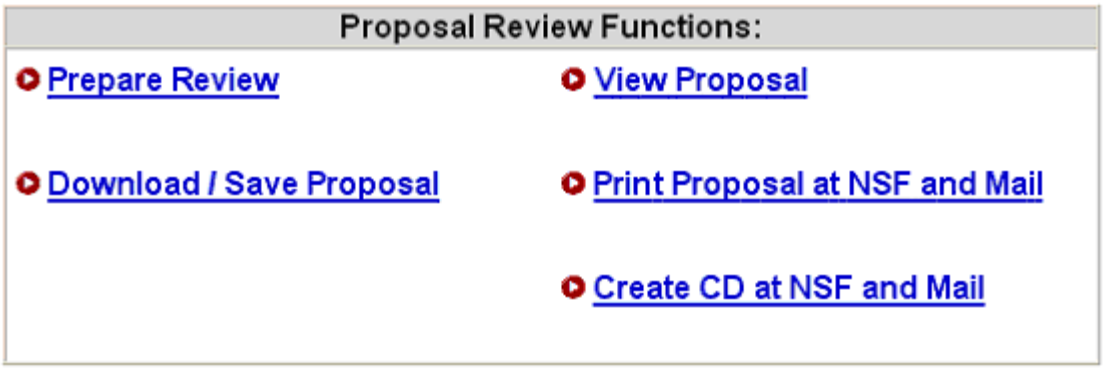


Figure 8 Proposal Review Functions section of the Proposal Review screen.

Prepare a Proposal Review

1. Access the **Proposal Review** screen (Figure 1) (see Log In to Proposal Review).

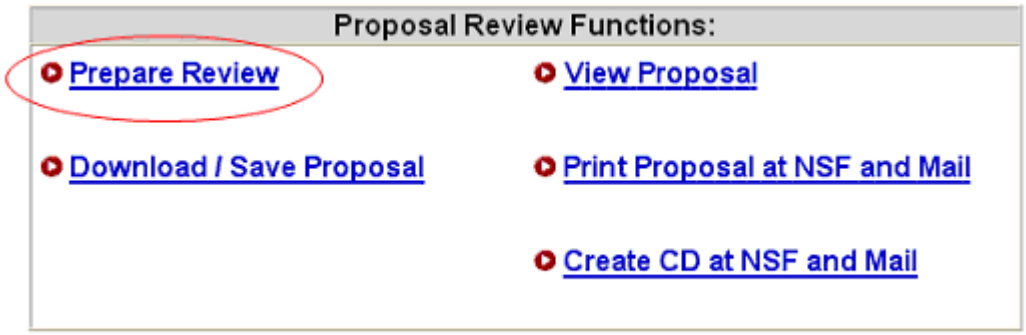


Figure 1 Lower portion of the Proposal Review screen. The Prepare Review link is circled.

2. On the **Proposal Review** screen (Figure 1), click **Proposal Review**. The **Merit Review Criteria** screen displays (Figure 2).

Merit Review Criteria

Notice: Effective January 2013, the National Science Foundation implemented revised merit review criteria. While the two merit review criteria are unchanged (Intellectual Merit and Broader Impacts), guidance has been provided to clarify and improve the function of the criteria.

Please provide detailed comments on the quality of this proposal with respect to **each** of the two NSF Merit Review Criteria identified below, noting specifically the proposal's strengths and weaknesses. Both criteria are to be given full consideration during the review and decision making processes; each criterion is necessary but neither, by itself, is sufficient. Please provide comments with respect to any additional solicitation-specific review criteria, if applicable. Also, please enter a summary statement that describes your overall assessment of the proposal based on the review criteria.

When evaluating NSF proposals, reviewers should consider what the proposers want to do, why they want to do it, how they plan to do it, how they will know if they succeed, and what benefits could accrue if the project is successful. These issues apply both to the technical aspects of the proposal and the way in which the project may make broader contributions. To that end, reviewers are asked to evaluate all proposals against two criteria:

- **Intellectual Merit:** The Intellectual Merit criterion encompasses the potential to advance knowledge; and
- **Broader Impacts:** The Broader Impacts criterion encompasses the potential to benefit society and contribute to the achievement of specific, desired societal outcomes.

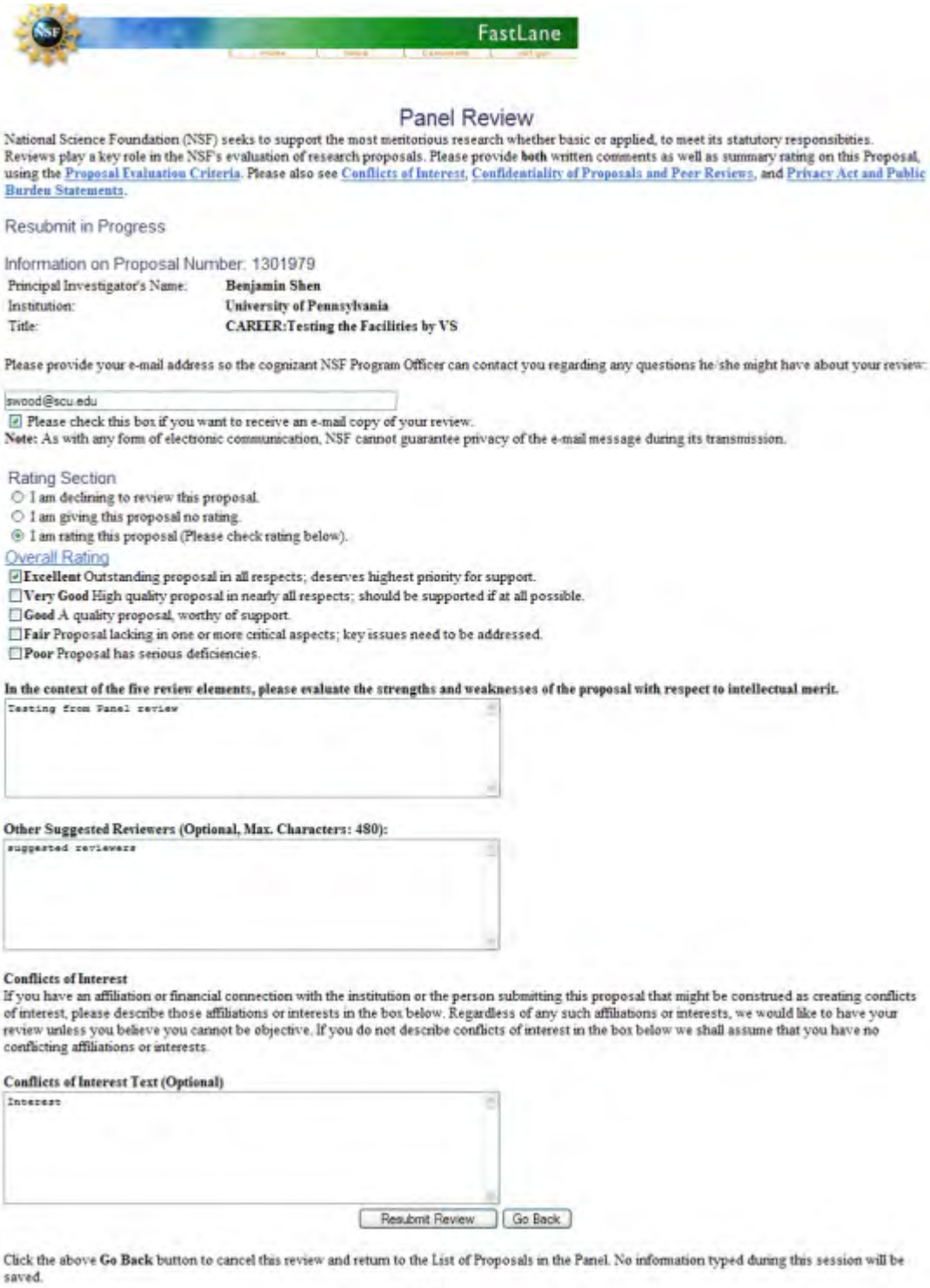
The following elements should be considered in the review for both criteria:

1. What is the potential for the proposed activity to:
   a. advance knowledge and understanding within its own field or across different fields (Intellectual Merit); and

   b. benefit society or advance desired societal outcomes (Broader Impacts)?
2. To what extent do the proposed activities suggest and explore creative, original, or potentially transformative concepts?
3. Is the plan for carrying out the proposed activities well-reasoned, well-organized, and based on a sound rationale? Does the plan incorporate a mechanism to assess success?
4. How well qualified is the individual, team, or institution to conduct the proposed activities?
5. Are there adequate resources available to the PI (either at the home institution or through collaborations) to carry out the proposed activities?

Figure 2 Merit Review Criteria screen.

3. Click the **Continue** button at the bottom of the **Merit Review Criteria** screen. The **Proposal Review Form** screen displays (Figure 3).



FastLane

Panel Review

National Science Foundation (NSF) seeks to support the most meritorious research whether basic or applied, to meet its statutory responsibities. Reviews play a key role in the NSF's evaluation of research proposals. Please provide **both** written comments as well as summary rating on this Proposal, using the Proposal Evaluation Criteria. Please also see Conflicts of Interest, Confidentiality of Proposals and Peer Reviews, and Privacy Act and Public Burden Statements.

Resubmit in Progress

Information on Proposal Number: 1301979

Principal Investigator's Name: **Benjamin Shen**
Institution: **University of Pennsylvania**
Title: **CAREER:Testing the Facilities by VS**

Please provide your e-mail address so the cognizant NSF Program Officer can contact you regarding any questions he/she might have about your review:

swood@scu.edu

☑ Please check this box if you want to receive an e-mail copy of your review.
Note: As with any form of electronic communication, NSF cannot guarantee privacy of the e-mail message during its transmission.

Rating Section

○ I am declining to review this proposal.
○ I am giving this proposal no rating.
◉ I am rating this proposal (Please check rating below).

Overall Rating

☑ **Excellent** Outstanding proposal in all respects; deserves highest priority for support.
☐ **Very Good** High quality proposal in nearly all respects; should be supported if at all possible.
☐ **Good** A quality proposal, worthy of support.
☐ **Fair** Proposal lacking in one or more critical aspects; key issues need to be addressed.
☐ **Poor** Proposal has serious deficiencies.

In the context of the five review elements, please evaluate the strengths and weaknesses of the proposal with respect to intellectual merit.

Testing from Panel review

Other Suggested Reviewers (Optional, Max. Characters: 480):

suggested reviewers

Conflicts of Interest

If you have an affiliation or financial connection with the institution or the person submitting this proposal that might be construed as creating conflicts of interest, please describe those affiliations or interests in the box below. Regardless of any such affiliations or interests, we would like to have your review unless you believe you cannot be objective. If you do not describe conflicts of interest in the box below we shall assume that you have no conflicting affiliations or interests.

Conflicts of Interest Text (Optional)

Interest

Resubmit Review | Go Back

Click the above **Go Back** button to cancel this review and return to the List of Proposals in the Panel. No information typed during this session will be saved.

Figure 3 Proposal Review Form screen.

4. In the **Work in Progress** section (Figure 3), type your email address.
5. *If you want a copy of the review emailed to you,* click the radio button under the **eMail** box.
6. In the **Rating Section** (Figure 3), click the radio button for one of the three options.

7. *If you agreed to rate the proposal*, in the **Overall Rating** section (Figure 3), click the radio button for one of the ratings.
8. In the **first** text box of the **Overall Rating** section (Figure 3), in the context of the five review elements, type your evaluation of the proposal with respect to intellectual merit.
9. In the **second** text box of the **Overall Rating** section (Figure 3), in the context of the five review elements, type your evaluation of the proposal with respect to broader impacts.
10. In the **third** text box of the **Overall Rating** section (Figure 3), type your evaluation of the proposal with respect to any additional solicitation-specific review criteria, if applicable.
11. In the **Summary Statement** box (Figure 3), type an evaluative summary. The summary should describe your overall assessment of the proposal based on the review criteria.
12. In the **Other Suggested Reviewers** box (Figure 3), type the names of any individuals that you think should review the proposal (optional).
13. In the **Conflicts of Interest** section (Figure 3), type an explanation of any conflict of interest that you may have in regard to this proposal. If you leave this box blank, NSF assumes there is no potential conflict of interest.

Once you have completed the Proposal Review form, you have two options:

- Submit the Proposal Review
- Save the Proposal Review for editing and submitting later

Submit the Proposal Review

1. On the lower portion of the **Proposal Review Form** screen (Figure 4), click the **Submit Review** button. The **Receipt of Proposal Review** screen displays (Figure 5).

Figure 4 Lower portion of Proposal Review Form screen. The Submit Review button is circled.

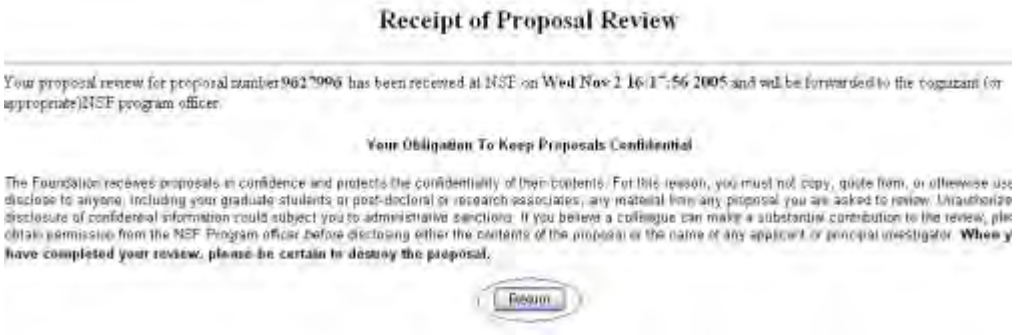


Figure 5 Receipt of Proposal Review screen. The Return button is circled.

2. Click **Return** (Figure 5). The **Proposal Review Log In** screen displays.

Save the Proposal Review

1. On the lower portion of the **Proposal Review Form** screen (Figure 6), click the **Save Review** button. The **Proposal Review Saved** screen displays (Figure 7).

Figure 6 Lower portion of Proposal Review Form screen. The Save Review button is circled.

Figure 7 Proposal Review Saved screen with a message that your proposal review has been saved.

2. Click the **Return** button (Figure 7). The **Proposal Review** screen displays (Figure 1). To work on the Proposal Review again, see Access a Saved Proposal Review.

Access a Saved Proposal Review

1. Access the **Proposal Review** screen (Figure 1) (see Log In to Proposal Review).

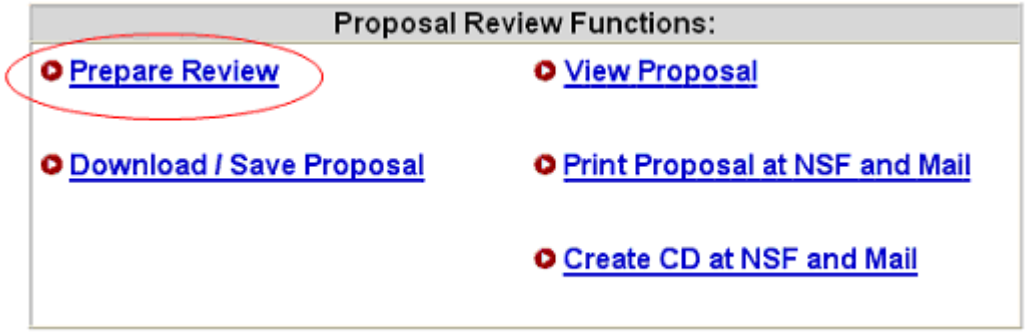
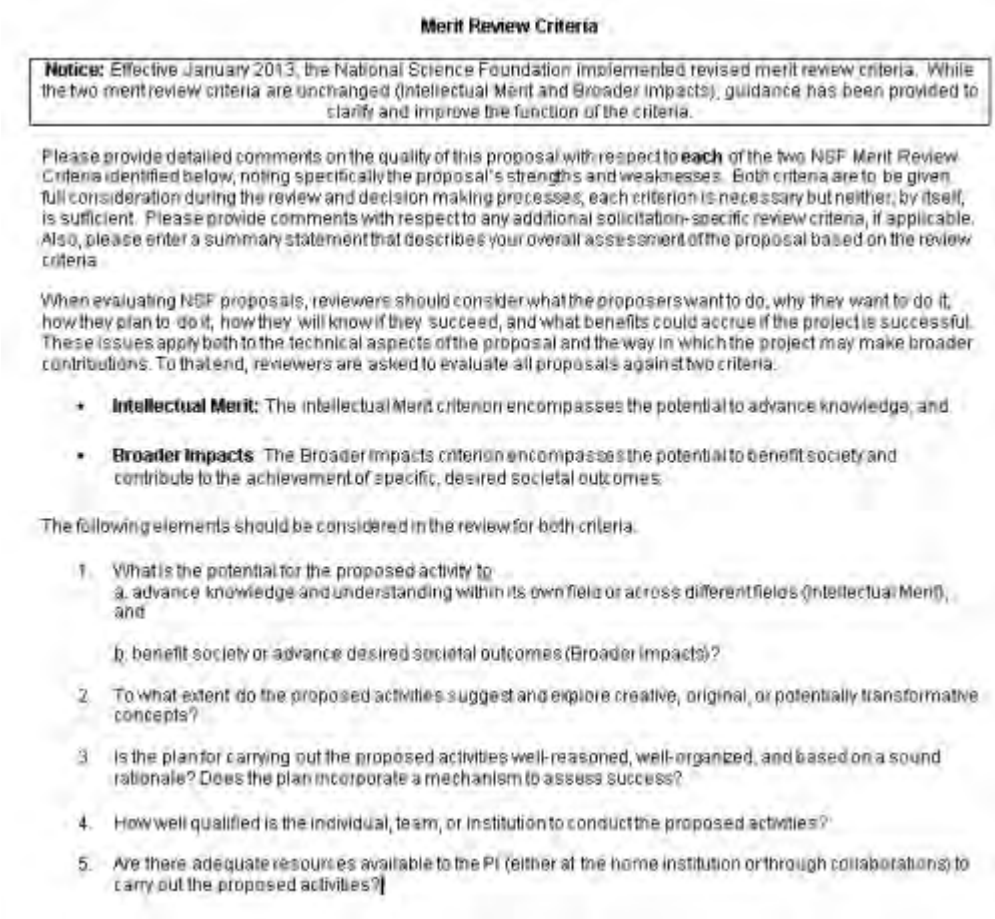


Figure 1 Lower portion of the Proposal Review screen. The Prepare Review link is circled.

2. On the **Proposal Review** screen (Figure 1), click **Proposal Review**. The **Merit Review Criteria** screen displays (Figure 2).



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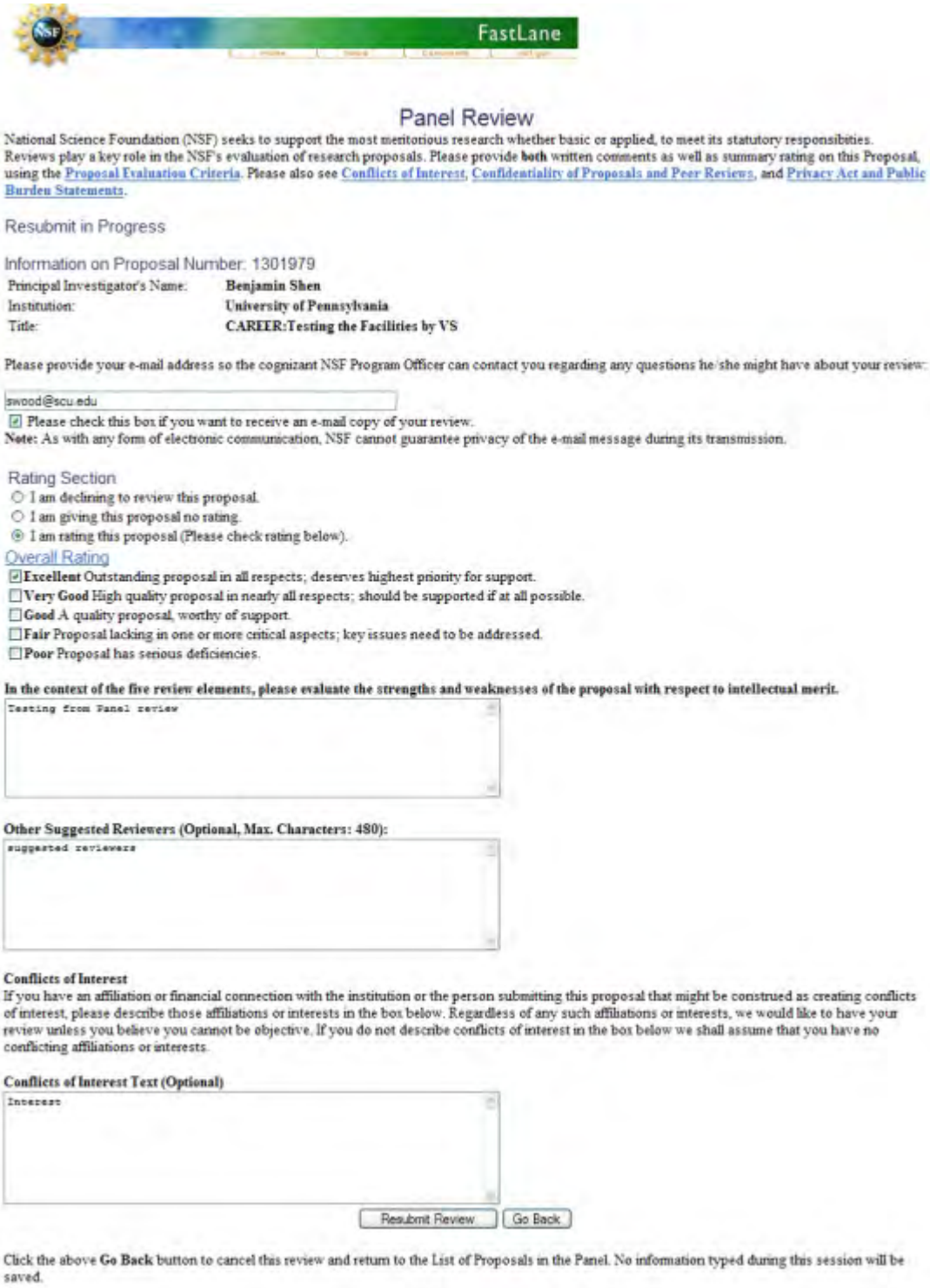
5. Are there adequate resources available to the PI (either at the home institution or through collaborations) to carry out the proposed activities?

Figure 2 Merit Review Criteria screen.

3. Click the **Continue** button at the bottom of the **Merit Review Criteria** screen. The **Proposal Review Form** screen displays (Figure 3) as you had saved it. To edit the review, see Prepare a Proposal Review, Step 4 through Step 12. To submit the review, see Submit a Review.



FastLane

Panel Review

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Resubmit in Progress

Information on Proposal Number: 1301979

Principal Investigator's Name:	**Benjamin Shen**
Institution:	**University of Pennsylvania**
Title:	**CAREER:Testing the Facilities by VS**

Please provide your e-mail address so the cognizant NSF Program Officer can contact you regarding any questions he/she might have about your review:

swood@scu.edu

☑ Please check this box if you want to receive an e-mail copy of your review.

Note: As with any form of electronic communication, NSF cannot guarantee privacy of the e-mail message during its transmission.

Rating Section

○ I am declining to review this proposal.
○ I am giving this proposal no rating.
◉ I am rating this proposal (Please check rating below).

Overall Rating

☑ **Excellent** Outstanding proposal in all respects; deserves highest priority for support.
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☐ **Fair** Proposal lacking in one or more critical aspects; key issues need to be addressed.
☐ **Poor** Proposal has serious deficiencies.

In the context of the five review elements, please evaluate the strengths and weaknesses of the proposal with respect to intellectual merit.

Testing from Panel review

Other Suggested Reviewers (Optional, Max. Characters: 480):

suggested reviewers

Conflicts of Interest

If you have an affiliation or financial connection with the institution or the person submitting this proposal that might be construed as creating conflicts of interest, please describe those affiliations or interests in the box below. Regardless of any such affiliations or interests, we would like to have your review unless you believe you cannot be objective. If you do not describe conflicts of interest in the box below we shall assume that you have no conflicting affiliations or interests.

Conflicts of Interest Text (Optional)

Interest

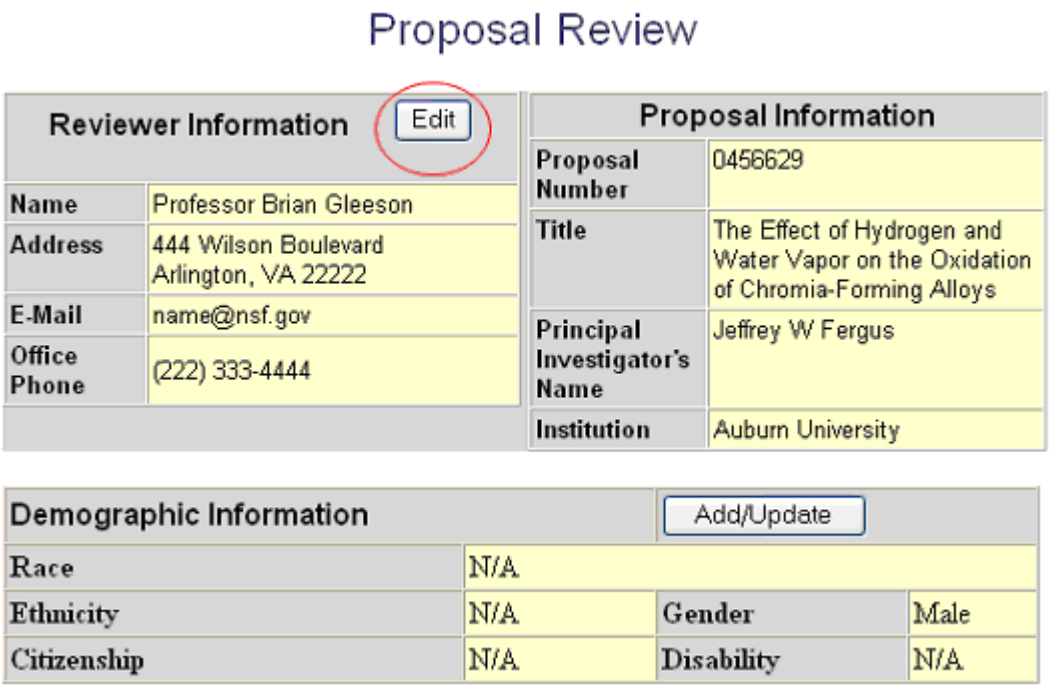
Resubmit Review | Go Back

Click the above **Go Back** button to cancel this review and return to the List of Proposals in the Panel. No information typed during this session will be saved.

Figure 3 Proposal Review Form screen.

Edit Your Information with NSF

1. Access the **Proposal Review** screen (Figure 1) (see Log In to Proposal Review).



Proposal Review

Reviewer Information	Edit
Name	Professor Brian Gleeson
Address	444 Wilson Boulevard Arlington, VA 22222
E-Mail	name@nsf.gov
Office Phone	(222) 333-4444

Proposal Information	
Proposal Number	0456629
Title	The Effect of Hydrogen and Water Vapor on the Oxidation of Chromia-Forming Alloys
Principal Investigator's Name	Jeffrey W Fergus
Institution	Auburn University

Demographic Information			Add/Update
Race	N/A		
Ethnicity	N/A	Gender	Male
Citizenship	N/A	Disability	N/A

Figure 1 Top portion of the Proposal Review screen. The Edit button is circled.

2. On the **Proposal Review** screen (Figure 1), click the **Edit** button. The **Reviewer's Information** screen displays (Figure 2).

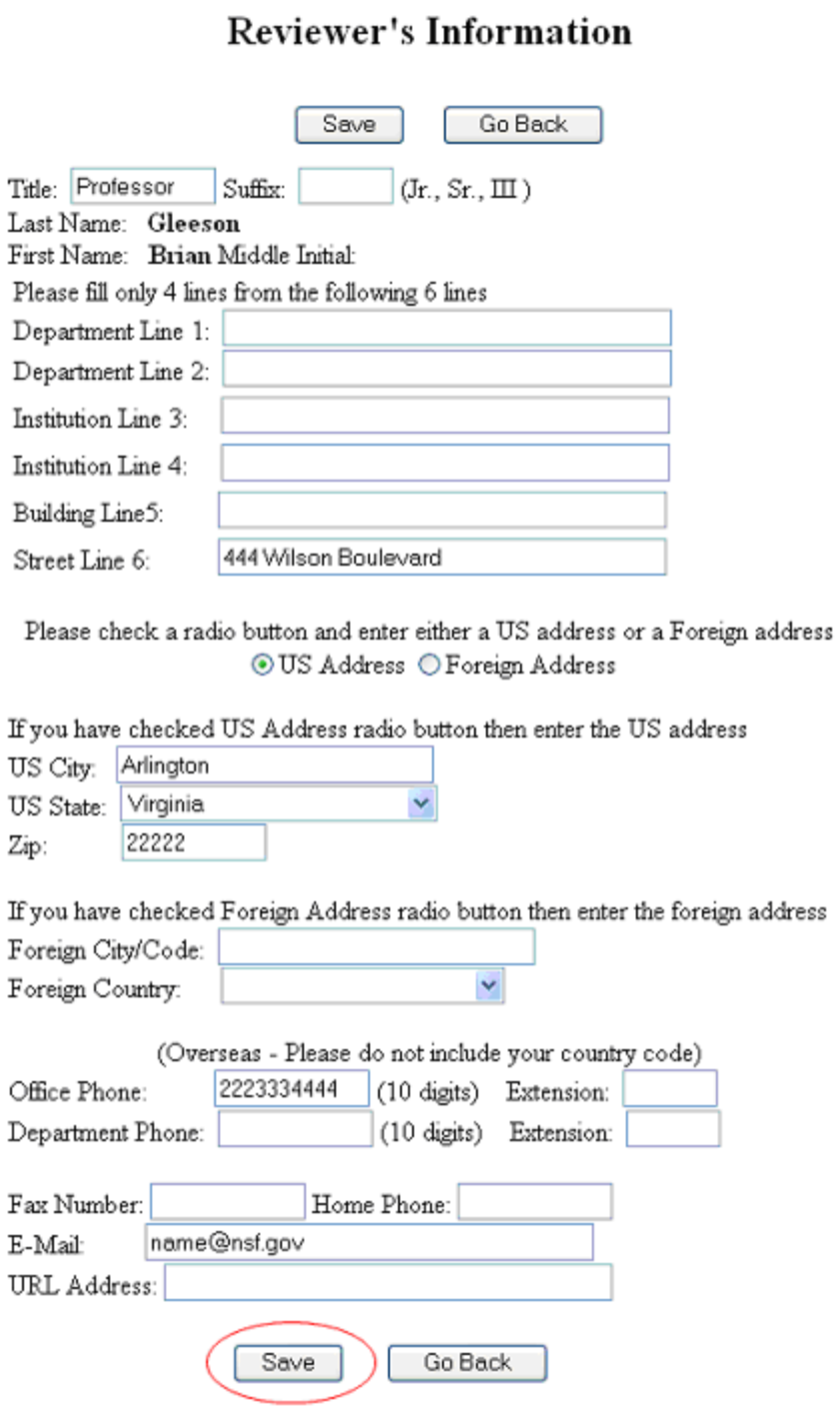


Figure 2 Reviewer's Information screen. The Save button is circled.

3. Change the information as you require (Figure 2).
4. Click the **Save** button (Figure 2). A screen displays (Figure 3) with the message that your information, as changed, has been saved.

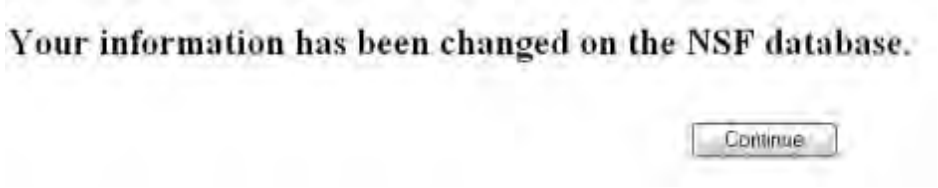


Figure 3 Screen with the message that the changed information has been saved.

Update Your Demographic Information

See Demographic Information: What and Why? and the Privacy Act and Public Burden Statements for an explanation of the categories of demographic information and how NSF uses this information.

All categories are optional.

1. Access the **Proposal Review** screen (Figure 1) (see Log In to Proposal Review).

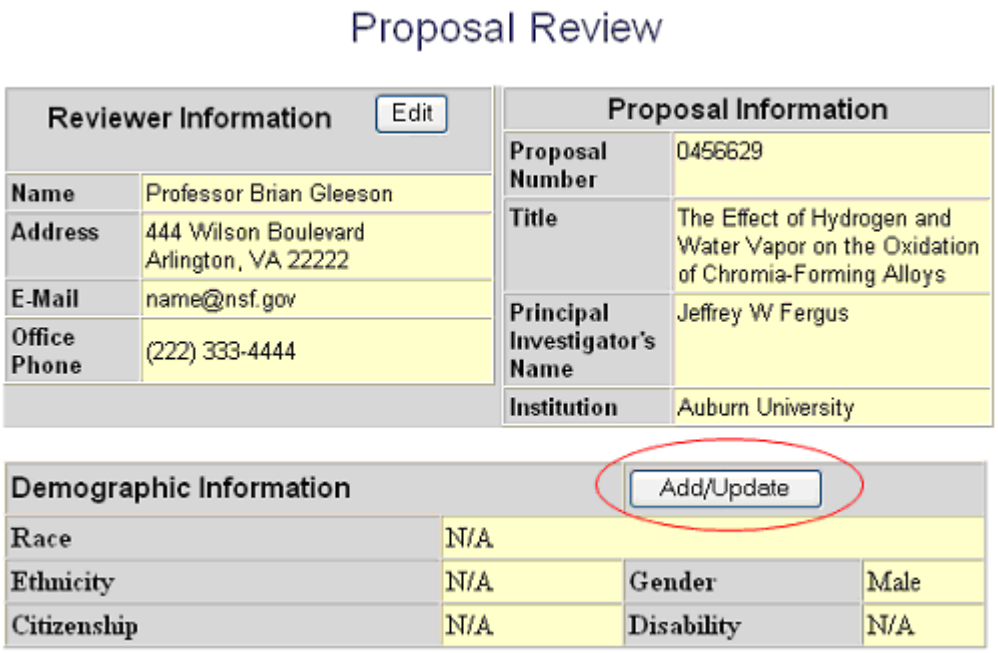


Figure 1 Top portion of the Proposal Review screen. The Add/Update button is circled.

2. In the **Demographic Information** section of the **Proposal Review** screen (Figure 1), click the **Add/Update** button. The **Please Add/Update Your Demographic Information** screen displays (Figure 2).

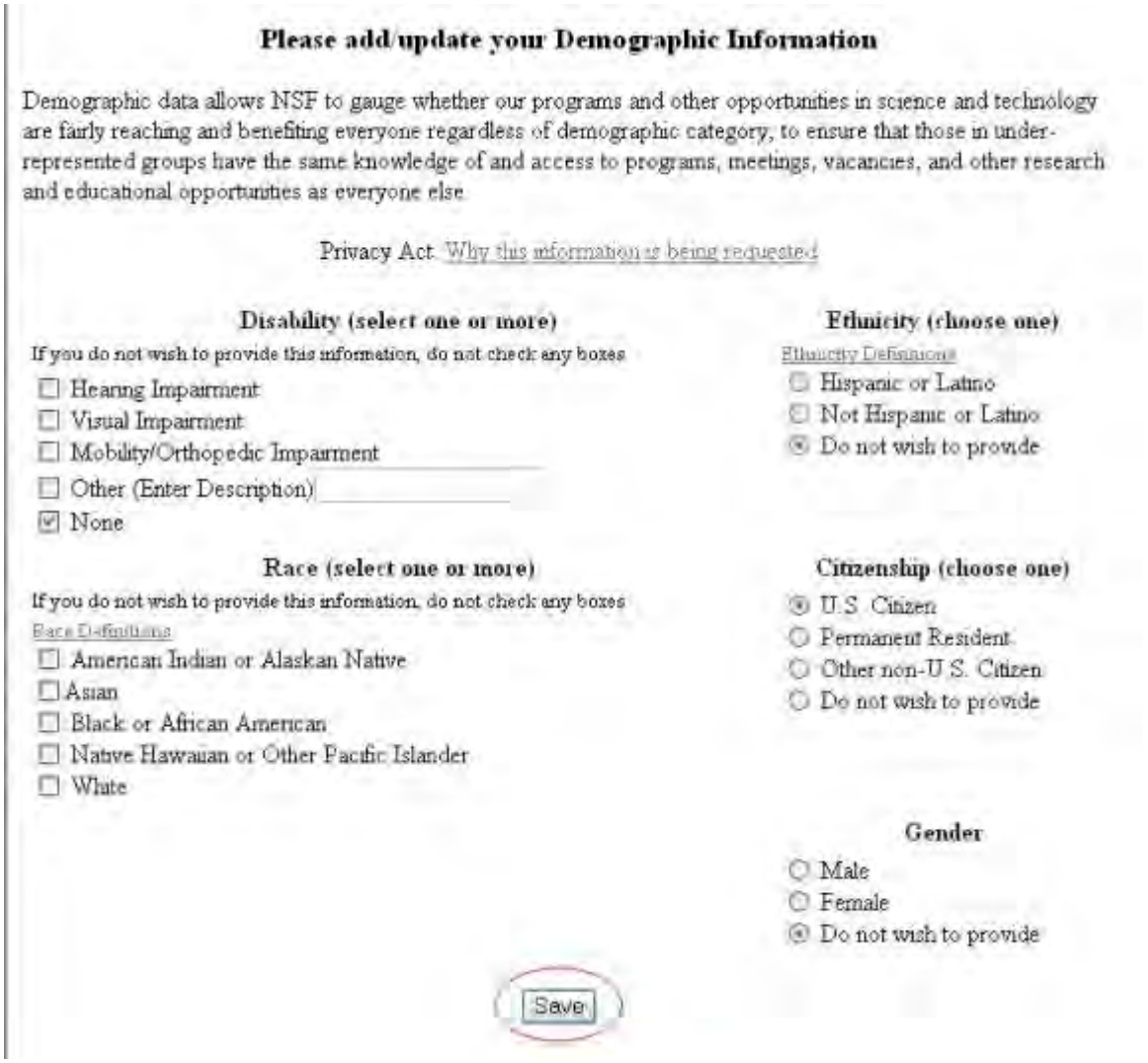


Figure 2 Please Add/Update Your Demographic Information screen. The Save button is circled.

3. Add to or change the demographic information as you require.
4. Click the **Save** button (Figure 2). The **Demographic Information** screen displays (Figure 3) with the message that the changes have been saved.

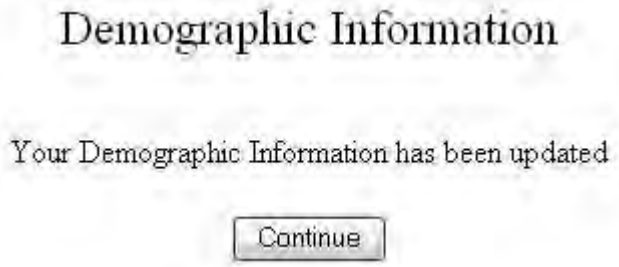


Figure 3 Demographic Information screen.

5. Click the **Continue** button (Figure 3). The **Proposal Review** screen displays (Figure 1).

View a Proposal

1. Access the **Proposal Review** screen (Figure 1) (see Log in to Proposal Review).

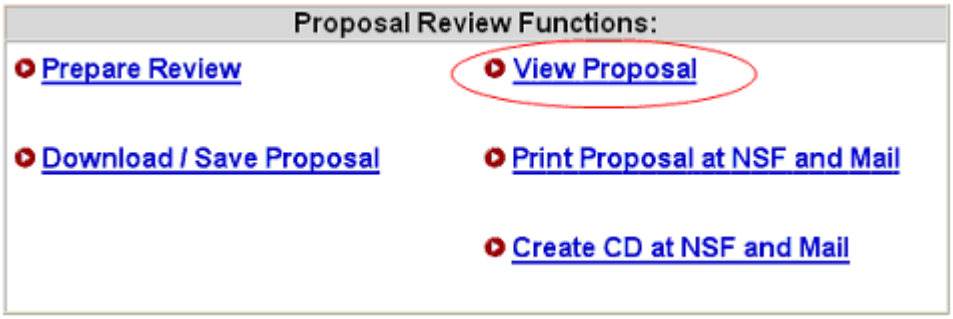


Figure 1 Lower portion of the Proposal Review screen. The View Proposal link is circled.

2. On the **Proposal Review** screen (Figure 1), click **View Proposal**. The **View / Print Proposal** screen displays (Figure 2). You have these options on the **View / Print** screen:
   - View the entire proposal
   - View a section of the proposal

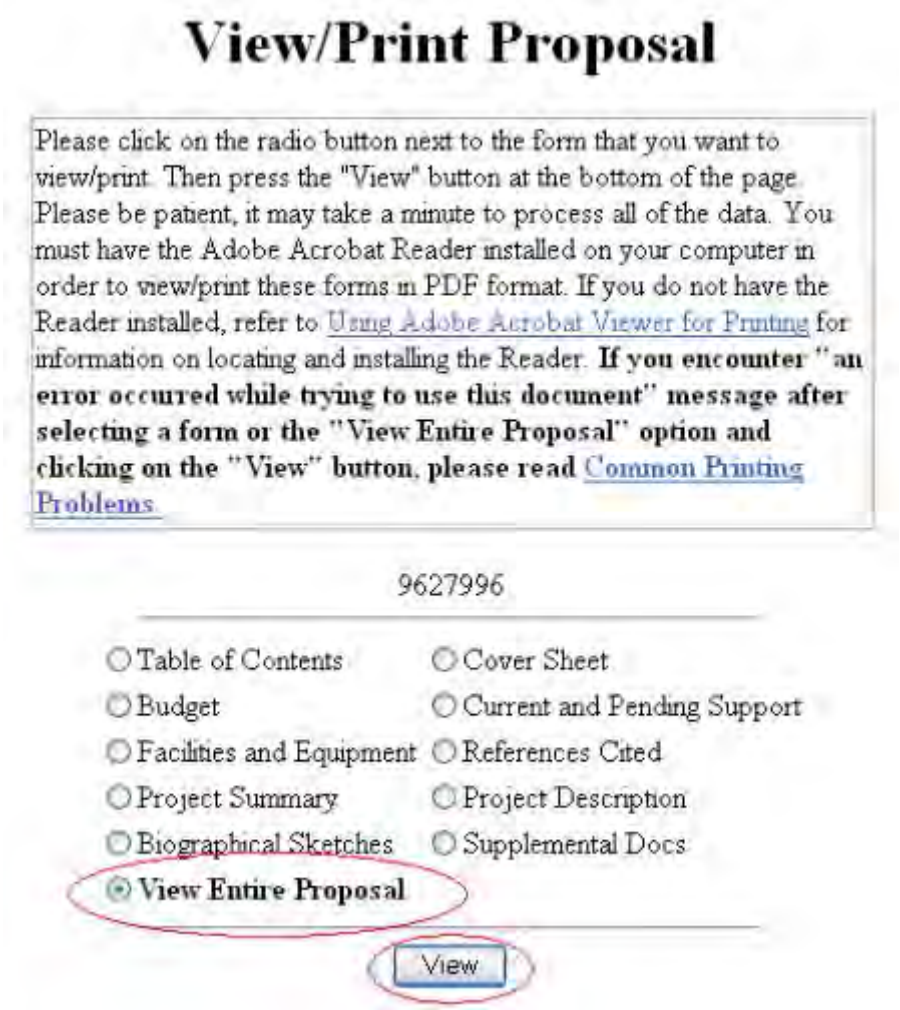
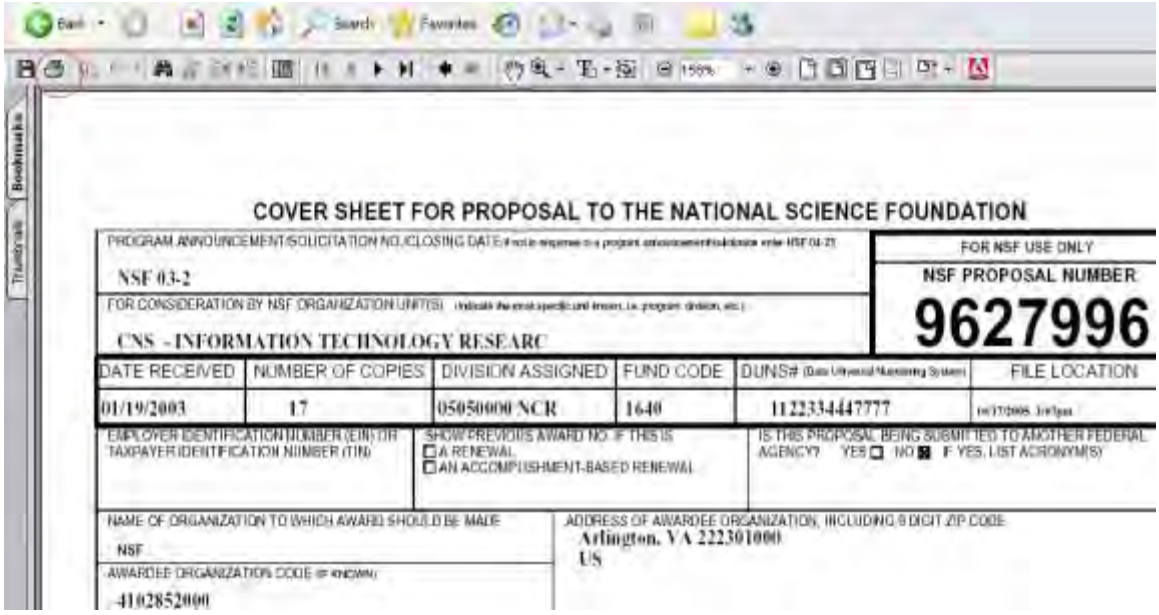


Figure 2 View / Print Proposal screen. The radio button for View Entire Proposal and the View button are circled.

View the Entire Proposal

1. On the **View / Print Proposal** screen (Figure 2), click the radio button for View Entire Proposal. The proposal displays in PDF format (Figure 3). If you need Adobe Reader, see Adobe Reader for FastLane.



COVER SHEET FOR PROPOSAL TO THE NATIONAL SCIENCE FOUNDATION

PROGRAM ANNOUNCEMENT/SOLICITATION NO./CLOSING DATE: NSF 03-2

FOR NSF USE ONLY

NSF PROPOSAL NUMBER 9627996

FOR CONSIDERATION BY NSF ORGANIZATION UNIT(S): CNS - INFORMATION TECHNOLOGY RESEARC

DATE RECEIVED	NUMBER OF COPIES	DIVISION ASSIGNED	FUND CODE	DUNS#	FILE LOCATION
01/19/2003	17	05050000 NCR	1640	1122334447777	

EMPLOYER IDENTIFICATION NUMBER (EIN) OR TAXPAYER IDENTIFICATION NUMBER (TIN)

SHOW PREVIOUS AWARD NO. IF THIS IS ☐ A RENEWAL ☐ AN ACCOMPLISHMENT-BASED RENEWAL

IS THIS PROPOSAL BEING SUBMITTED TO ANOTHER FEDERAL AGENCY? YES ☐ NO ☒ IF YES, LIST ACRONYM(S)

NAME OF ORGANIZATION TO WHICH AWARD SHOULD BE MADE: NSF

AWARDEE ORGANIZATION CODE (IF KNOWN): 4102852000

ADDRESS OF AWARDEE ORGANIZATION, INCLUDING 9 DIGIT ZIP CODE: Arlington, VA 222301000 US

Figure 3 Proposal in PDF format. The Print icon is circled.

2. To print the proposal, click the Print icon on the screen. The proposal prints in its entirety.

View a Section of the Proposal

1. On the **View / Print Proposal** screen (Figure 4), click the radio button for the section of the proposal you want to view. The proposal section displays in PDF format (Figure 5). If you need Adobe Reader, see Adobe Reader for FastLane.

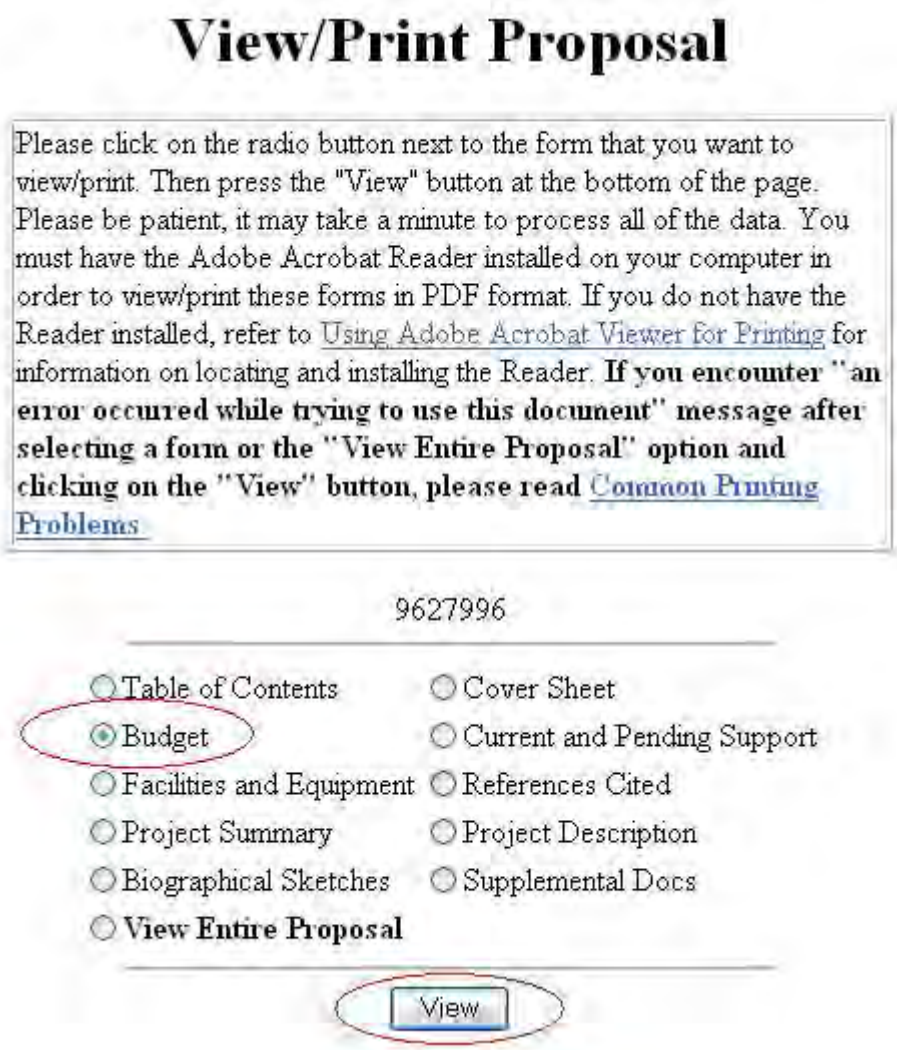
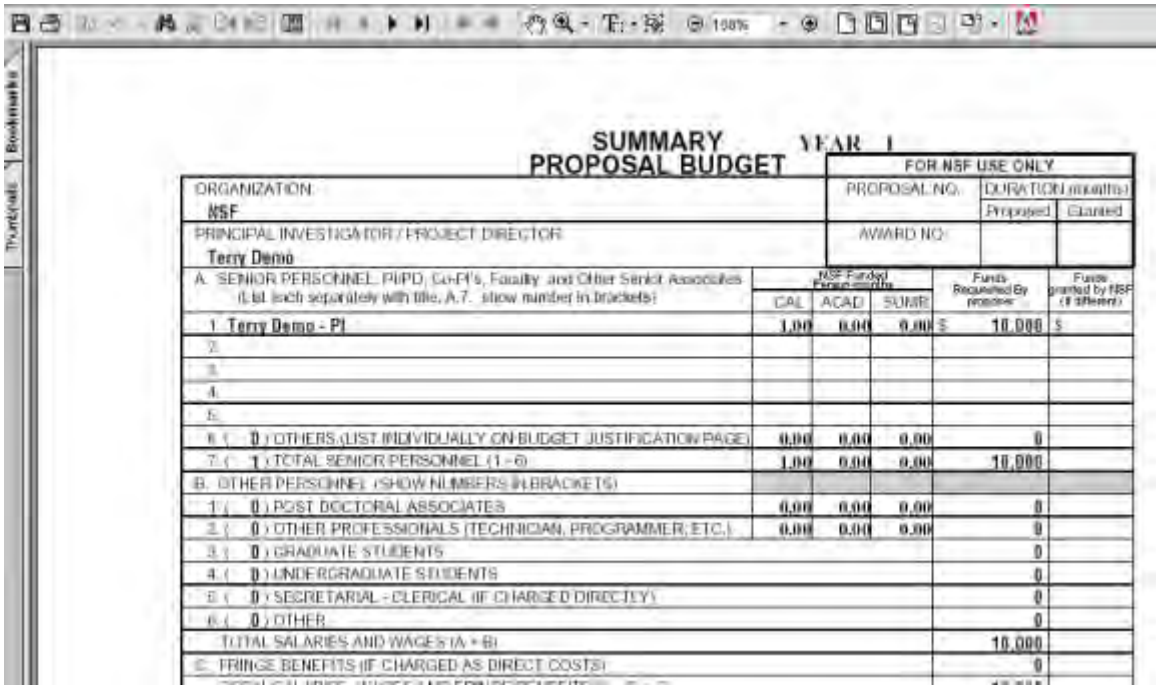


Figure 4 View / Print Proposal screen. The radio button for Budget and the View button are circled.



SUMMARY PROPOSAL BUDGET — YEAR 1

ORGANIZATION: NSF				FOR NSF USE ONLY	
				PROPOSAL NO.	DURATION (months) Proposed / Granted
PRINCIPAL INVESTIGATOR / PROJECT DIRECTOR: Terry Demo				AWARD NO.	
A. SENIOR PERSONNEL: PI/PD, Co-PI's, Faculty and Other Senior Associates (List each separately with title, A.7. show number in brackets)	NSF Funded Person-months CAL	ACAD	SUMR	Funds Requested By proposer	Funds granted by NSF (if different)
1. Terry Demo - PI	1.00	0.00	0.00	$ 10,000	$
2.					
3.					
4.					
5.					
6. (0) OTHERS (LIST INDIVIDUALLY ON BUDGET JUSTIFICATION PAGE)	0.00	0.00	0.00	0	
7. (1) TOTAL SENIOR PERSONNEL (1 - 6)	1.00	0.00	0.00	10,000	
B. OTHER PERSONNEL (SHOW NUMBERS IN BRACKETS)					
1. (0) POST DOCTORAL ASSOCIATES	0.00	0.00	0.00	0	
2. (0) OTHER PROFESSIONALS (TECHNICIAN, PROGRAMMER, ETC.)	0.00	0.00	0.00	0	
3. (0) GRADUATE STUDENTS				0	
4. (0) UNDERGRADUATE STUDENTS				0	
5. (0) SECRETARIAL - CLERICAL (IF CHARGED DIRECTLY)				0	
6. (0) OTHER				0	
TOTAL SALARIES AND WAGES (A + B)				10,000	
C. FRINGE BENEFITS (IF CHARGED AS DIRECT COSTS)				0	

Figure 5 Summary Proposal Budget in PDF format.

2. To print the section, click the Print icon on the screen. The proposal section prints.

Download and Save a Proposal

1. Access the **Proposal Review** screen (Figure 1) (see Log In to Proposal Review).

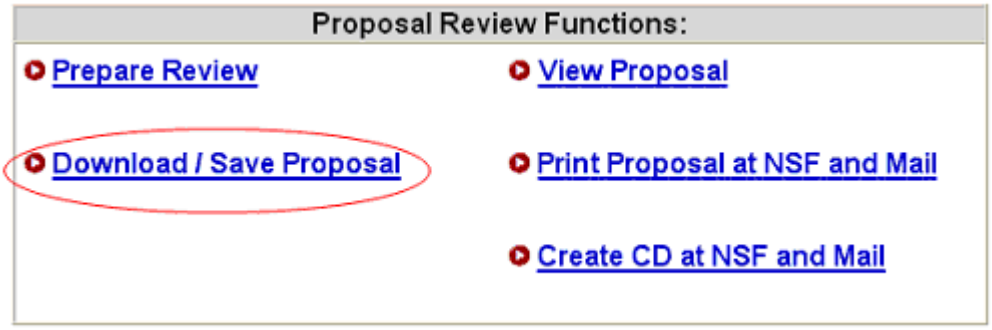


Figure 1 Lower portion of the Proposal Review screen. The Download / Save Proposal link is circled.

2. On the **Proposal Review** screen (Figure 1), click **Download / Save Proposal**. The **Download File** window displays (Figure 2).

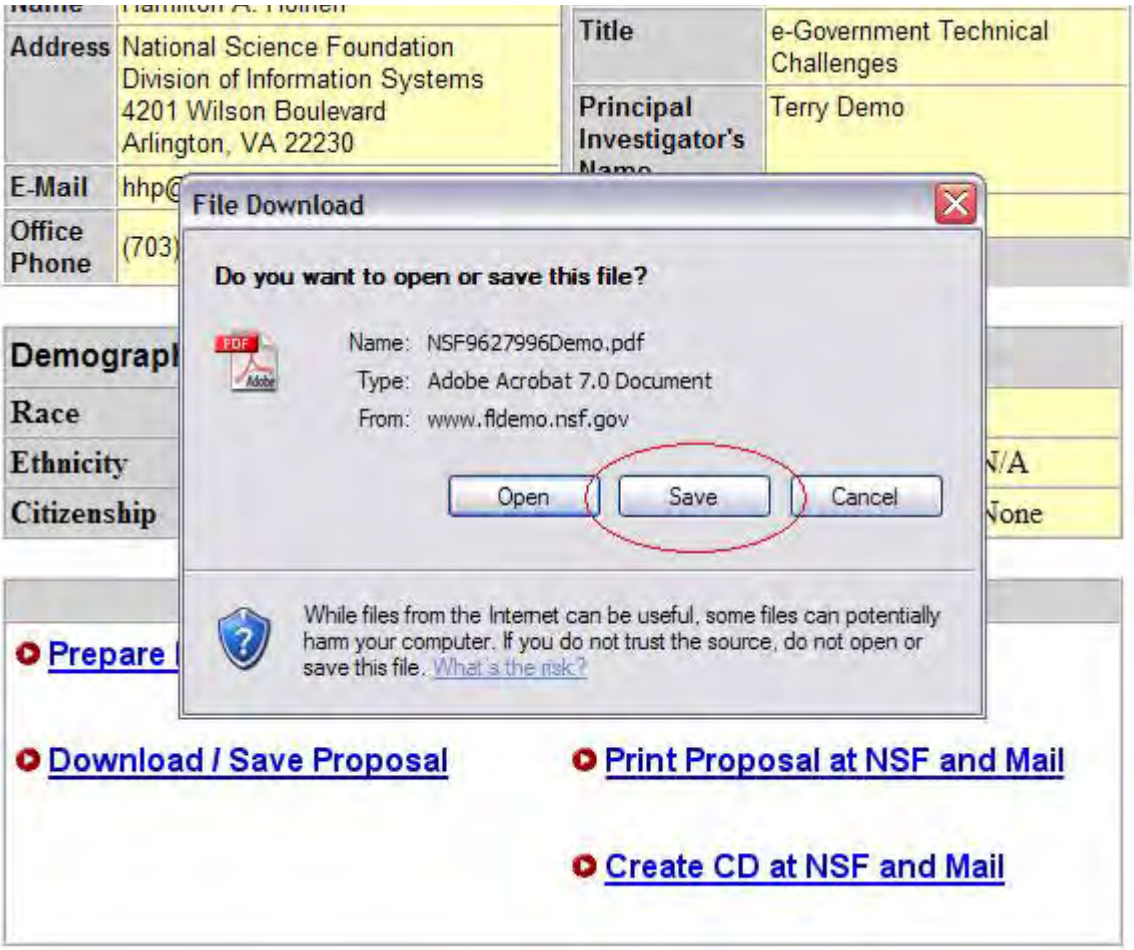


Figure 2 File Download window. The Save button is circled.

3. Click the **Save** button (Figure 2). The **Save As** window displays (Figure 3).

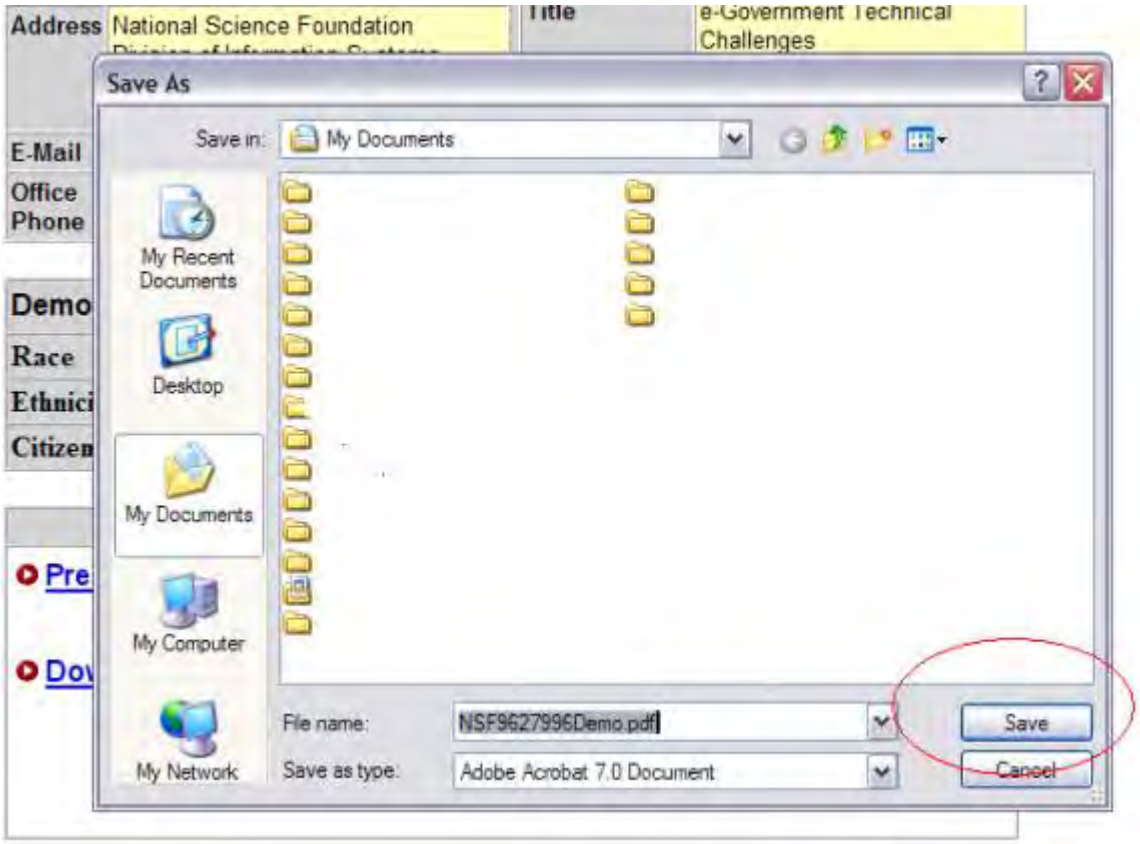


Figure 3 Save As window. The Save button is circled.

4. In the **File** Name box (Figure 3), give the proposal a title and select the section of your computer you want to save it to.
5. Click the **Save** button (Figure 3). The proposal downloads to your computer as a PDF file. After completion of the download, the **Proposal Review** screen displays (Figure 1).

Print Proposal at NSF and Mail

Print Proposal at NSF and Mail

1. Access the **Proposal Review** screen (Figure 1) (see Log In to Proposal Review).

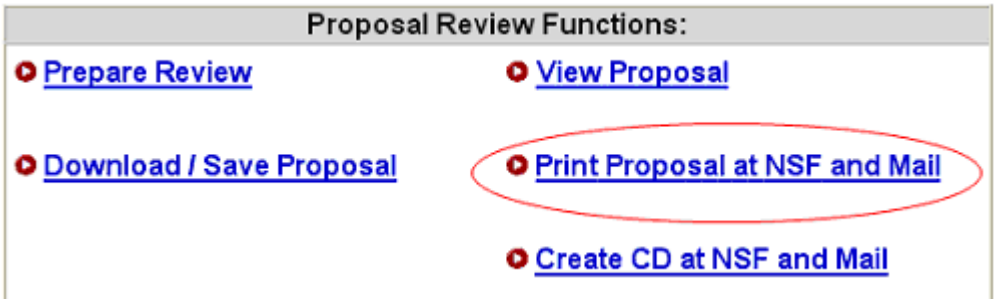


Figure 1 Lower portion of the Proposal Review screen. The Print Proposal at NSF and Mail link is circled.

2. Click **Print Proposal at NSF and Mail** (Figure 1). The **Print on Demand Submit Request** screen displays (Figure 2).

Figure 2 Print on Demand Submit Request screen. The Submit Request button is circled.

3. In the **Reviewer Name** section (Figure 2), check to see that your name and address as displayed are correct. If it is incorrect, update your information.
4. *If you want NSF to send the proposal to a different address than the one displayed in the **Reviewer Name** section*, type the new address in the boxes provided.
5. Click **Submit Request** button (Figure 2). The **Proposal Print Request** screen displays (Figure 3) with your address and the message that the request has been submitted.

Figure 3 Proposal Print Request screen. The Return to Proposal Review button is circled.

6. Click **Return to Proposal Review** (Figure 3). The **Proposal Review** screen displays (Figure 1).

Print Proposal at NSF and Mail

1. Access the **Proposal Review** screen (Figure 1) (see Log In to Proposal Review).

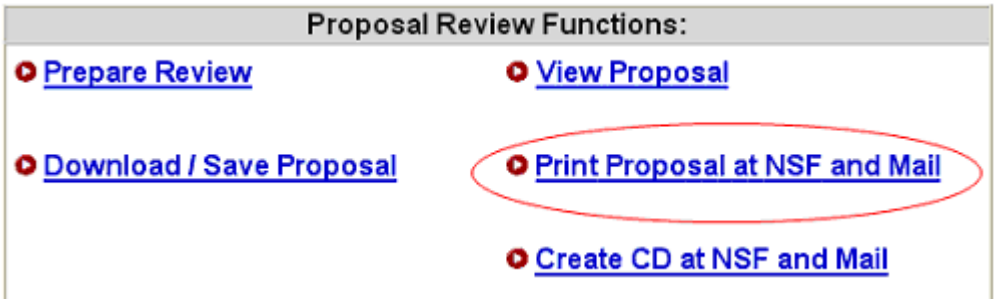


Figure 1 Lower portion of the Proposal Review screen. The Print Proposal at NSF and Mail link is circled.

2. Click **Print Proposal at NSF and Mail** (Figure 1). The **Print on Demand Submit Request** screen displays (Figure 2).

Figure 2 Print on Demand Submit Request screen. The Submit Request button is circled.

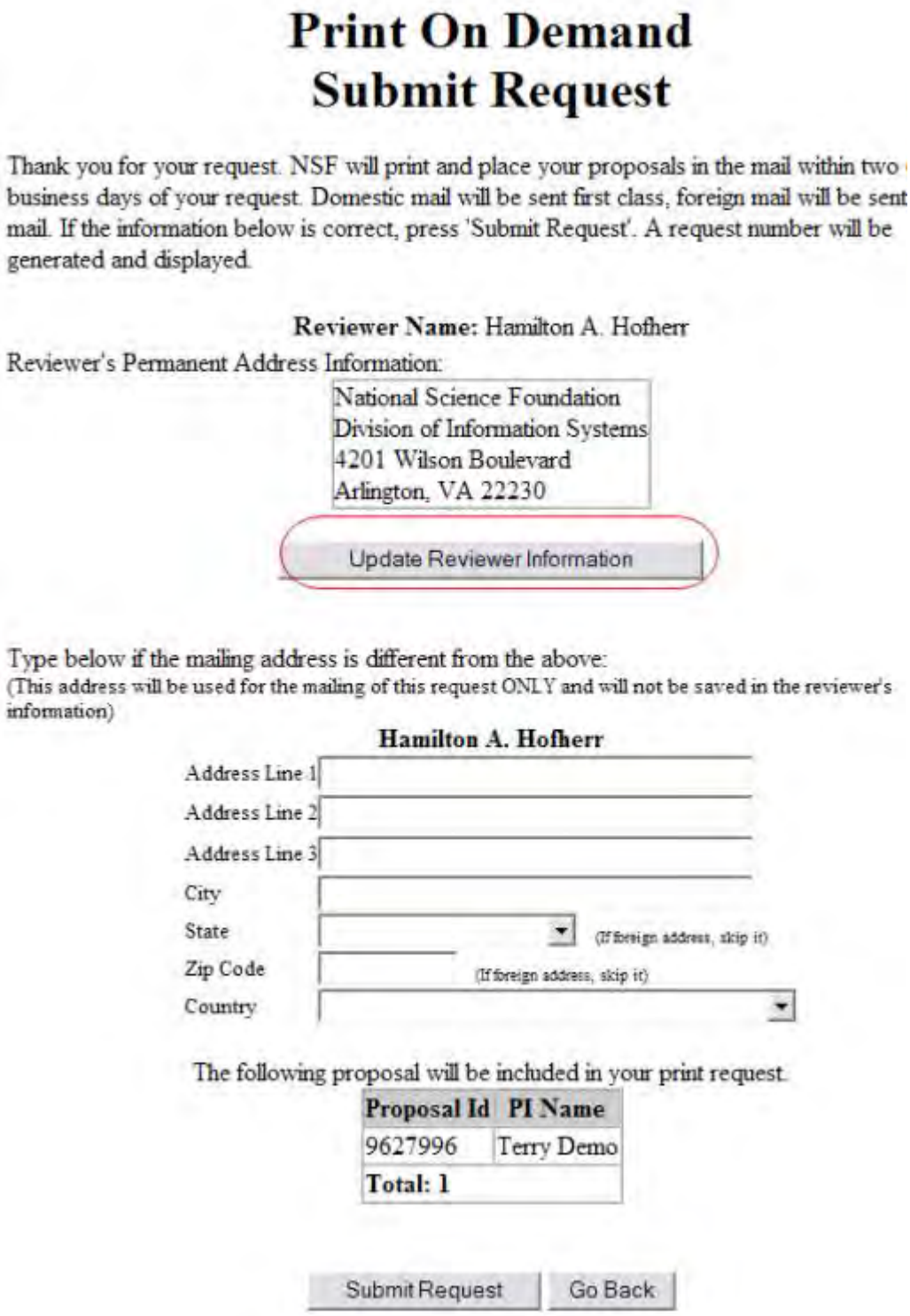
3. In the **Reviewer Name** section (Figure 2), check to see that your name and address as displayed are correct. If it is incorrect, update your information.
4. *If you want NSF to send the proposal to a different address than the one displayed in the **Reviewer Name** section*, type the new address in the boxes provided.
5. Click **Submit Request** button (Figure 2). The **Proposal Print Request** screen displays (Figure 3) with your address and the message that the request has been submitted.

Figure 3 Proposal Print Request screen. The Return to Proposal Review button is circled.

6. Click **Return to Proposal Review** (Figure 3). The **Proposal Review** screen displays (Figure 1).

Update Information for Printing at NSF

1. Access the **Print on Demand Submit Request** screen (Figure 1) (see Print at NSF and Mail, Step 1 and Step 2).



Print On Demand
Submit Request

Thank you for your request. NSF will print and place your proposals in the mail within two business days of your request. Domestic mail will be sent first class, foreign mail will be sent mail. If the information below is correct, press 'Submit Request'. A request number will be generated and displayed.

Reviewer Name: Hamilton A. Hofherr

Reviewer's Permanent Address Information:

National Science Foundation
Division of Information Systems
4201 Wilson Boulevard
Arlington, VA 22230

Update Reviewer Information

Type below if the mailing address is different from the above:
(This address will be used for the mailing of this request ONLY and will not be saved in the reviewer's information)

Hamilton A. Hofherr

Address Line 1
Address Line 2
Address Line 3
City
State (If foreign address, skip it)
Zip Code (If foreign address, skip it)
Country

The following proposal will be included in your print request.

Proposal Id	PI Name
9627996	Terry Demo
Total: 1	

Submit Request | Go Back

Figure 1 Print on Demand Submit Request screen. The Update Reviewer Information button is circled.

2. In the **Reviewer Name** section of the **Print on Demand Submit Request** screen (Figure 1), click **Update Reviewer Information**. The **Reviewer's Information** screen displays (Figure 2).

Figure 2 Reviewer's Information screen. The Save button is circled.

3. Change the information as you require (Figure 2).
4. Click the **Save** button (Figure 2). A screen displays with the message that your information has been saved (Figure 3).

Figure 3 Screen with the message that your information has been saved.

5. Click the **Continue** button (Figure 3). The **Print on Demand Submit Request** screen displays (Figure 1).

Create CD at NSF and Mail

Create a CD at NSF and Mail

1. Access the **Proposal Review** screen (Figure 1) (see Log In to Proposal Review).

Figure 1 Lower portion of the Proposal Review screen. The Create CD at NSF and Mail link is circled.

2. On the **Proposal Review** screen (Figure 1), click **Create CD at NSF and Mail**. The **CD on Demand Submit Request** screen displays (Figure 2).

CD On Demand
Submit Request

Thank you for your request. NSF will copy your proposals on CD and place it in the mail within two (2) business days of your request. Domestic mail will be sent first class, foreign mail will be sent air mail. If the information below is correct, press 'Submit Request'. A request number will be generated and displayed.

Reviewer Name: Brian Gleeson

Reviewer's Permanent Address Information:

444 Wilson Boulevard
Arlington , VA 22222

Update Reviewer Information

Type below if the mailing address is different from the above
(This address will be used for the mailing of this request ONLY and will not be saved in the reviewer's information)

Brian Gleeson

Address Line 1
Address Line 2
Address Line 3
City
State
Zip Code
Country

The following proposal(s) will be included in your CD request.

Prop No.	PI Last Name	Information Message
0456629	Fergus	

Total Proposals: 1

Submit Request | Go Back

Figure 2 CD on Demand Submit Request screen. The Submit Request button is circled.

3. In the **Reviewer Name** section (Figure 2), check to see that your name and address as displayed are correct. If they are incorrect, update your information.
4. *If you want NSF to send the proposal to a different address than the one*
5. *displayed in the **Reviewer Name** section*, type the new address in the boxes provided (Figure 2).
6. Click the **Submit Request** button (Figure 2). The **CD on Demand Submit Request Confirmation** screen displays (Figure 3) with your address and the message that the request has been submitted.

Figure 3 CD on Demand Submit Request Confirmation screen. The Continue button is circled.

7. Click the **Continue** button (Figure 3). A screen displays with the message that the request is submitted.

Create a CD at NSF and Mail

1. Access the **Proposal Review** screen (Figure 1) (see Log In to Proposal Review).

Figure 1 Lower portion of the Proposal Review screen. The Create CD at NSF and Mail link is circled.

2. On the **Proposal Review** screen (Figure 1), click **Create CD at NSF and Mail**. The **CD on Demand Submit Request** screen displays (Figure 2).

CD On Demand
Submit Request

Thank you for your request. NSF will copy your proposals on CD and place it in the mail within two (2) business days of your request. Domestic mail will be sent first class, foreign mail will be sent air mail. If the information below is correct, press 'Submit Request'. A request number will be generated and displayed.

Reviewer Name: Brian Gleeson

Reviewer's Permanent Address Information:

444 Wilson Boulevard
Arlington , VA 22222

Update Reviewer Information

Type below if the mailing address is different from the above
(This address will be used for the mailing of this request ONLY and will not be saved in the reviewer's information)

Brian Gleeson

Address Line 1
Address Line 2
Address Line 3
City
State
Zip Code
Country

The following proposal(s) will be included in your CD request.

Prop No.	PI Last Name	Information Message
0456629	Fergus	

Total Proposals: 1

Submit Request | Go Back

Figure 2 CD on Demand Submit Request screen. The Submit Request button is circled.

3. In the **Reviewer Name** section (Figure 2), check to see that your name and address as displayed are correct. If they are incorrect, update your information.
4. *If you want NSF to send the proposal to a different address than the one*
5. *displayed in the **Reviewer Name** section*, type the new address in the boxes provided (Figure 2).
6. Click the **Submit Request** button (Figure 2). The **CD on Demand Submit Request Confirmation** screen displays (Figure 3) with your address and the message that the request has been submitted.

Figure 3 CD on Demand Submit Request Confirmation screen. The Continue button is circled.

7. Click the **Continue** button (Figure 3). A screen displays with the message that the request is submitted.

Update Personal Information for CD on Demand

1. Access the **CD on Demand Submit Request** screen (Figure 1) (see Create a CD at NSF and Mail, Steps 1 and 2).

Figure 1 CD on Demand Submit Request screen. The Update Reviewer Information button is circled.

2. On the **CD on Demand Submit Request** screen (Figure 1), click the **Update Reviewer Information** button. The **Reviewer's Information** screen displays (Figure 2).

Figure 2 Reviewer's Information screen. The Save button is circled.

3. Change the information as you require (Figure 2).
4. Click the **Save** button (Figure 2). A screen displays with the message that your information has been saved (Figure 3).

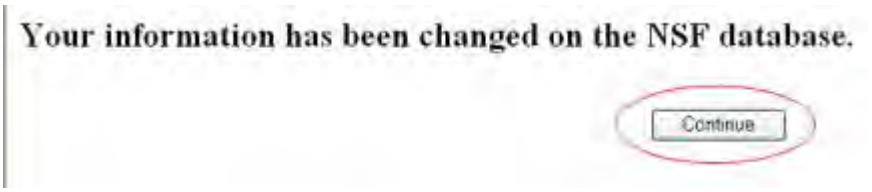


Figure 3 Screen with the message that your information has been saved.

SPO Functions

Sponsored Project Office Functions Introduction

Print the contents of the SPO Functions book.

The Sponsored Project Office (SPO) representative potentially has many diverse functions. All these functions are accessed through Research Administration (see Log In to SPO Functions).

The functions you are able to carry out as an SPO depend upon the permissions that you have as a user. When you log in to Research Administration, on the **Research Administration** screen (Figure 1), you will have access only to those SPO functions for which you have permission.

Note: *If you have permission as a Financial User,* to carry out financial functions, click the **Financial Functions** link on the **FastLane Home Page** screen.)

Figure 1 Research Administration screen. This individual has user permissions for all functions carried out in Research Administration.

If you do not have permissions for a function, that function does not display when you access the **Research Administration** screen. Here is a table that maps user permissions to user functions.

User Permission Granted	Function Listed on Research Administration Screen
Add, Modify, and Delete	

FastLane Users	Accounts Management (Within accounts management, you have access only to those functions for which you have permission.)
Change User Permissions	
Initialize User Passwords	
Review/Revise Organizational Information	
Financial Administrator	
View Only	• Organizational Reports • View/Print Organization's Award Letters
Sponsored Projects Officer	• Organizational Reports • View/Print Organization's Award Notices • View/Edit Notifications To or Requests For NSF Approvals Under Grants • View/Edit Proposals/Supplements/File Updates/Withdrawals • View/Edit Revised Budgets
Authorized Organizational Representative	• Organizational Reports • View/Print Organization's Award Notices • View Project Reports • View/Edit Notifications To or Requests For NSF Approvals Under Grants • View/Edit Proposals/Supplements/Withdrawals • View/Edit/Submit Revised Budgets • Authorized Organizational Representative Functions

Click on a link below for instructions for that SPO function:

- Accounts Management
- Letters of Intent
- Proposals/Supplements/File Updates/Withdrawals:
  - Work on and submit proposals
  - Withdraw a proposal
  - View and print a submitted proposal
  - Check the status of a proposal
  - Supplementary Funding Requests
  - Proposal File Updates
- Award Documents
- Check Continuation Funding Status
- Forwarded/Submitted Revised Budgets
- Notifications and Requests
- Organizational Reports
- Authorized Organizational Representative Functions

Sponsored Project Office Functions Introduction

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The Sponsored Project Office (SPO) representative potentially has many diverse functions. All these functions are accessed through Research Administration (see Log In to SPO Functions).

The functions you are able to carry out as an SPO depend upon the permissions that you have as a user. When you log in to Research Administration, on the **Research Administration** screen (Figure 1), you will have access only to those SPO functions for which you have permission.

Note: *If you have permission as a Financial User,* to carry out financial functions, click the **Financial Functions** link on the **FastLane Home Page** screen.)

Figure 1 Research Administration screen. This individual has user permissions for all functions carried out in Research Administration.

If you do not have permissions for a function, that function does not display when you access the **Research Administration** screen. Here is a table that maps user permissions to user functions.

User Permission Granted	Function Listed on Research Administration Screen
Add, Modify, and Delete FastLane Users	Accounts Management (Within accounts management, you have access only to those functions for which you have permission.)
Change User Permissions	
Initialize User Passwords	
Review/Revise Organizational Information	

Financial Administrator	
View Only	• Organizational Reports • View/Print Organization's Award Letters
Sponsored Projects Officer	• Organizational Reports • View/Print Organization's Award Notices • View/Edit Notifications To or Requests For NSF Approvals Under Grants • View/Edit Proposals/Supplements/File Updates/Withdrawals • View/Edit Revised Budgets
Authorized Organizational Representative	• Organizational Reports • View/Print Organization's Award Notices • View Project Reports • View/Edit Notifications To or Requests For NSF Approvals Under Grants • View/Edit Proposals/Supplements/Withdrawals • View/Edit/Submit Revised Budgets • Authorized Organizational Representative Functions

Click on a link below for instructions for that SPO function:

- Accounts Management
- Letters of Intent
- Proposals/Supplements/File Updates/Withdrawals:
  - Work on and submit proposals
  - Withdraw a proposal
  - View and print a submitted proposal
  - Check the status of a proposal
  - Supplementary Funding Requests
  - Proposal File Updates
- Award Documents
- Check Continuation Funding Status
- Forwarded/Submitted Revised Budgets
- Notifications and Requests
- Organizational Reports
- Authorized Organizational Representative Functions

Log In to SPO Functions in Research Administration

1. On the **FastLane Home Page** screen (Figure 1), click **Research Administration**. The **Research Administration Login** screen displays (Figure 2).

Figure 1 FastLane Home Page screen. The Research Administration link is circled.

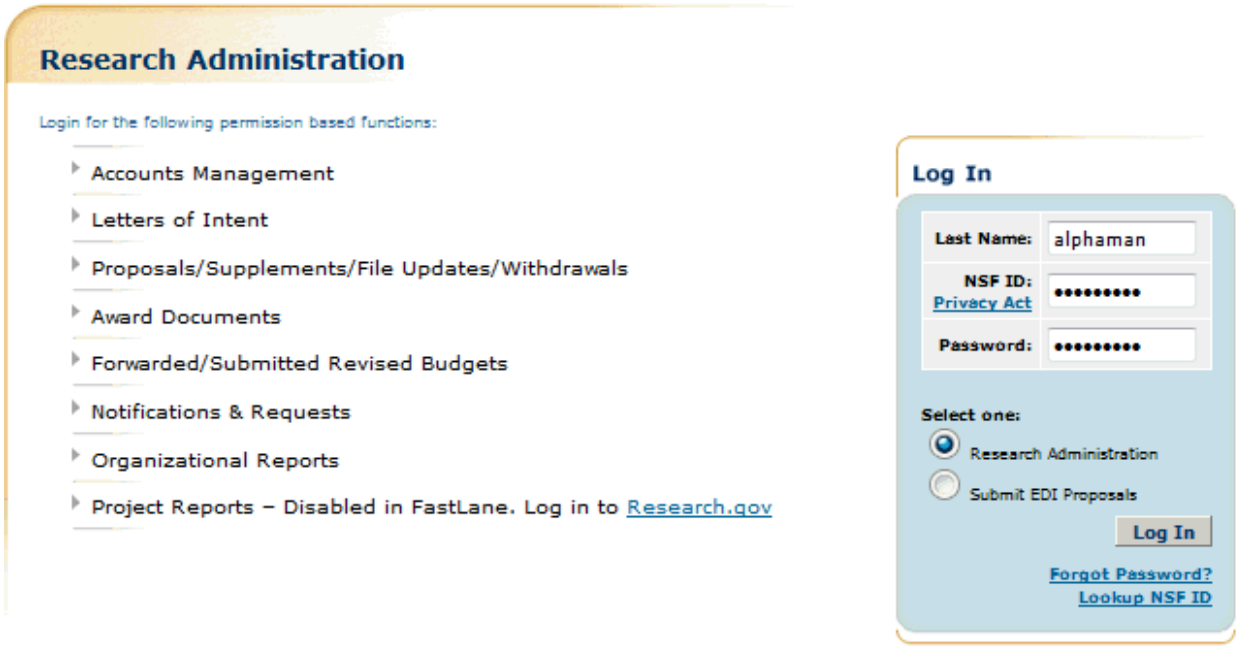

Figure 2 Research Administration Login screen. The Login box, the radio button for Research Administration, and the Login button are circled.

2. In the **Login** section (Figure 2), enter the following in the boxes for:
   - **Last Name**
   - **NSF ID** (your National Science Foundation Identification number)
   - **Password**
3. Click the radio button for Research Administration (Figure 2).
4. Click the **Login** button (Figure 2). The **Research Administration** screen displays (Figure 3), with the listing of functions for which you have permissions.

5. Click on a function link (Figure 2) to go to that function in Research Administration:
   - Accounts Management
   - Letters of Intent
   - Proposals/Supplements/File Updates/Withdrawals—Work on:
     - Proposals
       - Edit/Submit proposals (AOR only)
       - Withdraw a proposal (AOR only)
       - View and print a submitted proposal
       - Check the status of a proposal
     - Supplementary Funding Requests
     - Proposal File Updates
   - Award Documents
   - Check Continuation Funding Status
   - Forwarded/Submitted Revised Budgets
   - Notifications and Requests
   - Organizational Reports
   - Authorized Organizational Representative Functions

   (Click on a link for instructions for that function.)

The **Research Administration** screen (Figure 3) also features an **In Box** that shows you how many documents are available for review in these SPO function categories:

- Proposals/Supplements/File Updates/Withdrawals
- Forwarded/Submitted Revised Budgets
- Notifications and Request
- AOR Functions
- Letters of Intent

Click on the number of the documents link to go to that function category.

Figure 3 Research Administration screen. The In Box, with the number of documents waiting for attention by function category, is circled.

Accounts Management

Accounts Management Introduction

In Accounts Management, you communicate with NSF on basic information about your organization and the people in it.

In the **User Account** section, you can do the following:

- Add a user and assign the individual a password and user permissions
- View and modify the profile of an existing user, including modifying user permissions
- Delete a user
- View the Organization Permissions Report that shows the permissions for all functions and for all individuals

In the **Organization Information** section, you can do the following:

- Change your organization's name
- Revise your organization's basic contact information

In the **Financial Representative Information** section, you can do the following:

- Input the information for up to three financial representatives

See Access Accounts Management for instructions to begin working on Accounts Management.

Accounts Management Introduction

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In the **Financial Representative Information** section, you can do the following:

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See Access Accounts Management for instructions to begin working on Accounts Management.

Access Accounts Management

1. Access the **Research Administration** screen (Figure 1) (see Log In to SPO Functions).

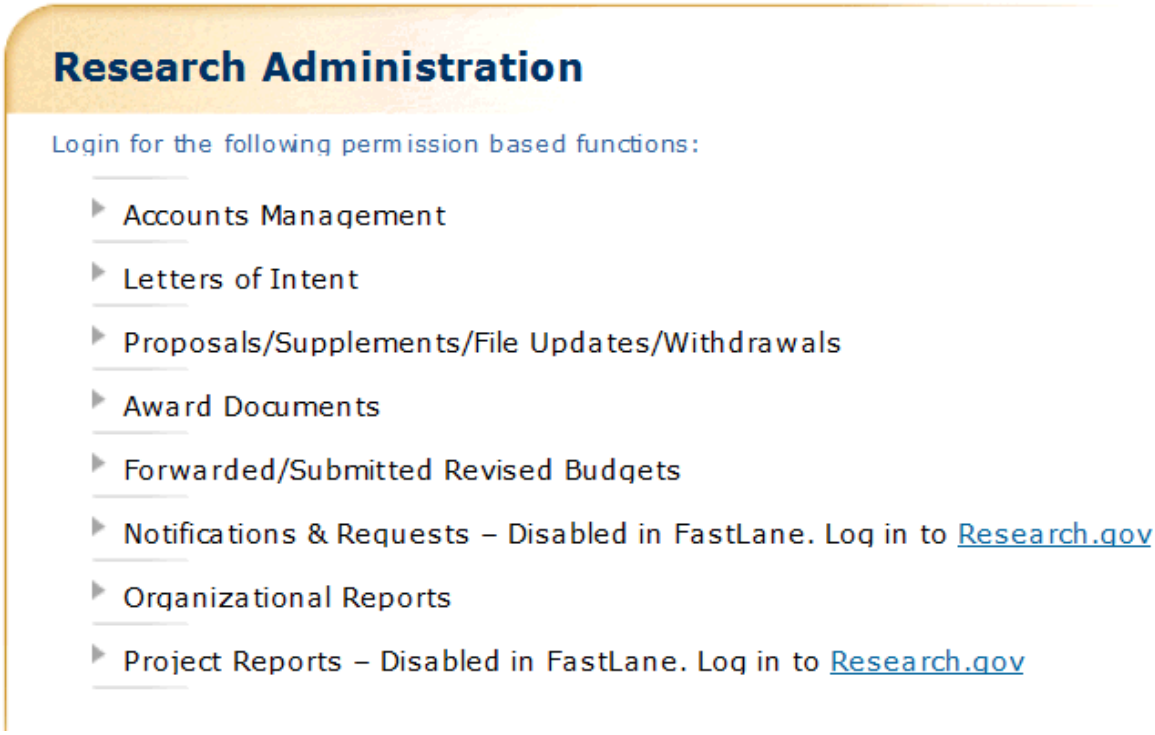


Figure 1 Research Administration screen. The Accounts Management link is circled.

2. On the **Research Administration** screen (Figure 2), click **Accounts Management** (Figure 1). The **Accounts Management** screen displays on the **User Account** tab (Figure 2) at first without any listing of users. You have these immediate options on the **Accounts Management** screen:
   - Search for a user
   - View all users
   - Add a user
   - View an Organization Permissions Report

   Once a listing of users displays on the screen, you have these additional options:
   - View a user profile
   - Modify a user's information or permissions
   - Delete a user

   (Click on a link above for instructions for that option.)

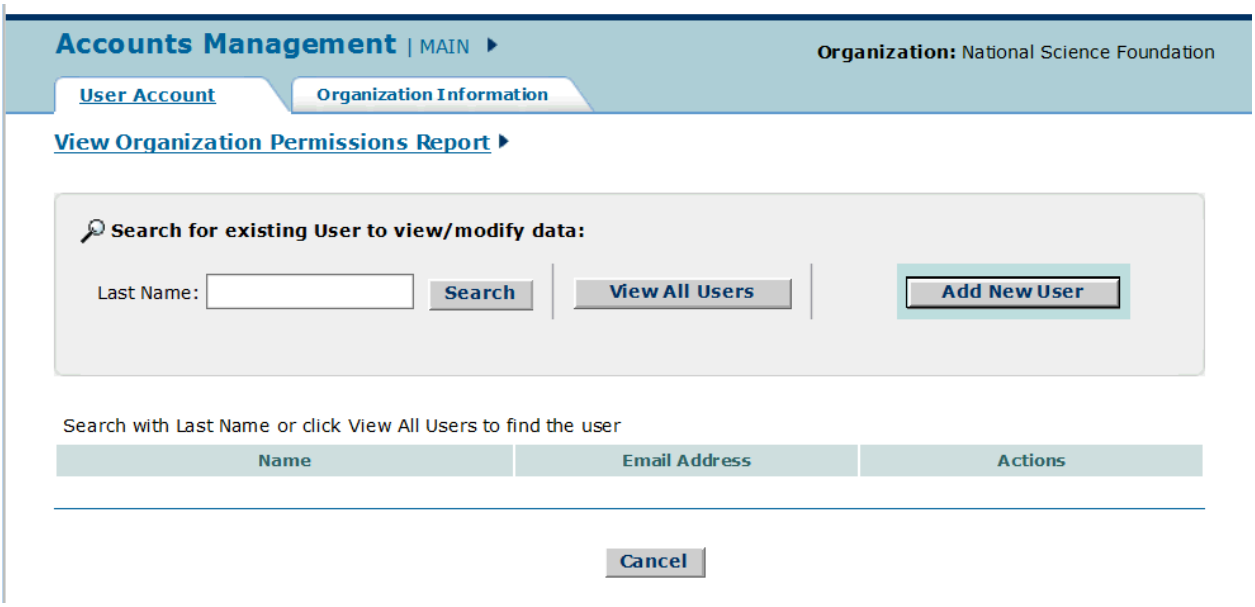


Figure 2 Accounts Management screen.

Search for a User

1. Access the **Accounts Management** screen on the **User Account** tab (Figure 1) (see Access Accounts Management).

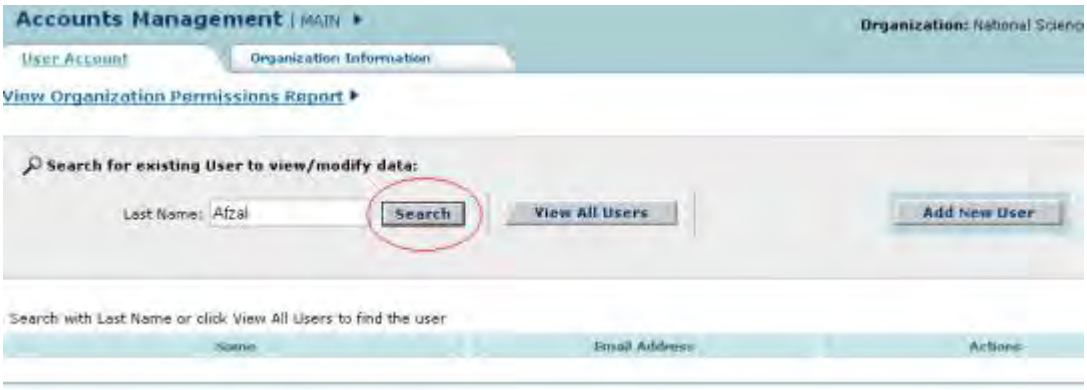


Figure 1 Accounts Management screen. The Search button is circled.

2. On the **Accounts Management** screen on the **User Account** tab (Figure 1), in the **Search for Existing User to View / Modify Data** section, type the last name of the user in the **Last Name** box.
3. Click the **Search** button (Figure 1). The **Accounts Management** screen displays (Figure 2) with the user listed in the **Search Results** section. For the user, you have these options for action:
   - View the information and permissions for a user
   - Modify a user's information or permissions
   - Delete a user

   (Click on a link above for instructions for that option.)

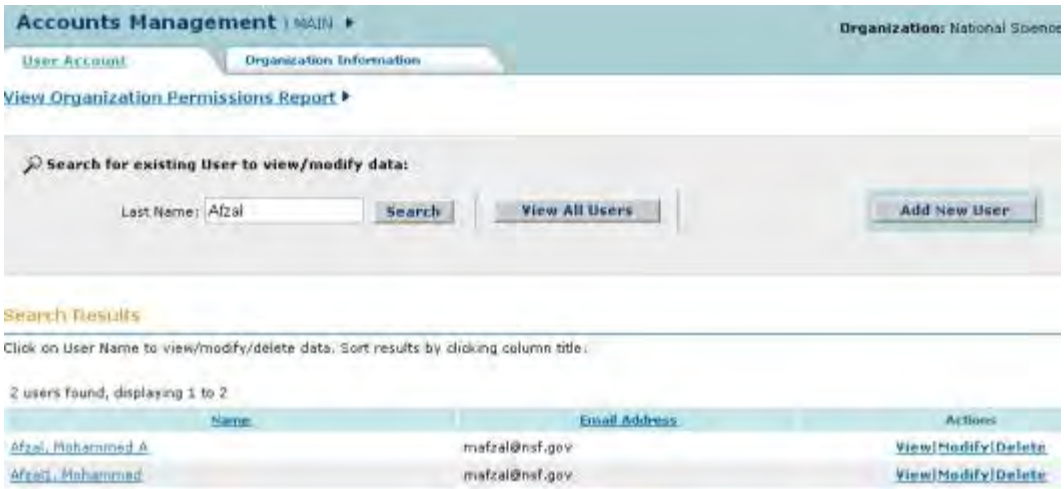


Figure 2 Accounts Management screen with the user's name, email address, and options for action in the Search Results section.

View All Users

1. Access the **Accounts Management** screen on the **User Account** tab (Figure 1) (see Access Accounts Management).

Figure 1 Accounts Management screen. The View All Users button is circled.

2. On the **Accounts Management** screen on the **User Account** tab (Figure 1), click the **View All Users** button. The **Accounts Management** screen displays (Figure 2) with a listing of all the users in your organization in the **Search Results** section. For any user listed, you have these options:
   - View the information and permissions for a user
   - Modify a user's information or permissions
   - Delete a user

   (Click on a link above for instructions for that option.)

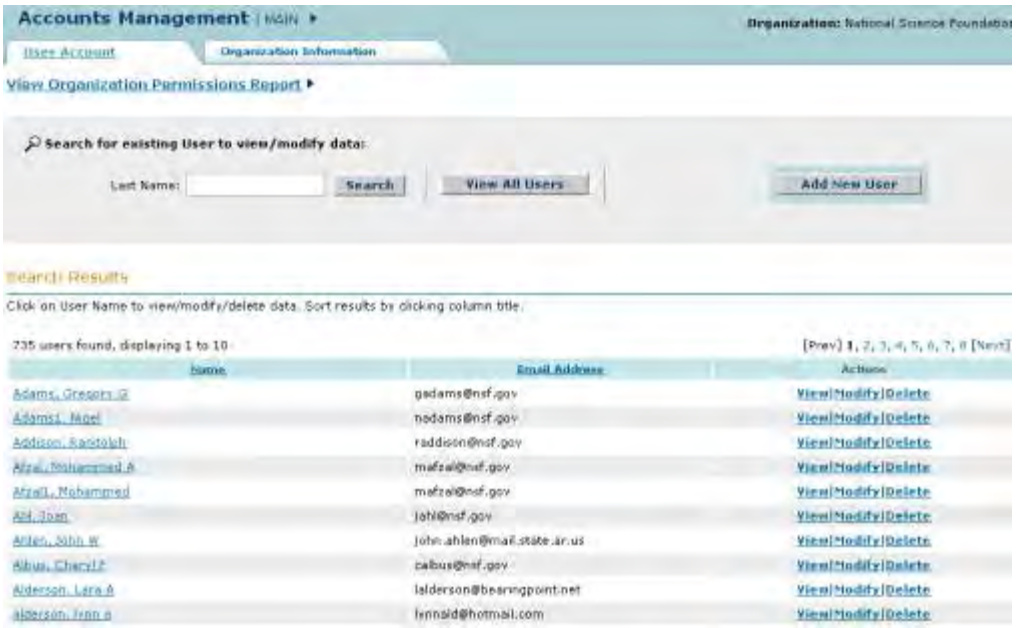


Figure 2 Accounts Management screen with all the users of your organization listed in the Search Results section.

View a User Profile

1. Access the **Accounts Management** screen on the **User Account** tab with a user name in the **Search Results** section (Figure 1) (see Search for a User or View All Users).

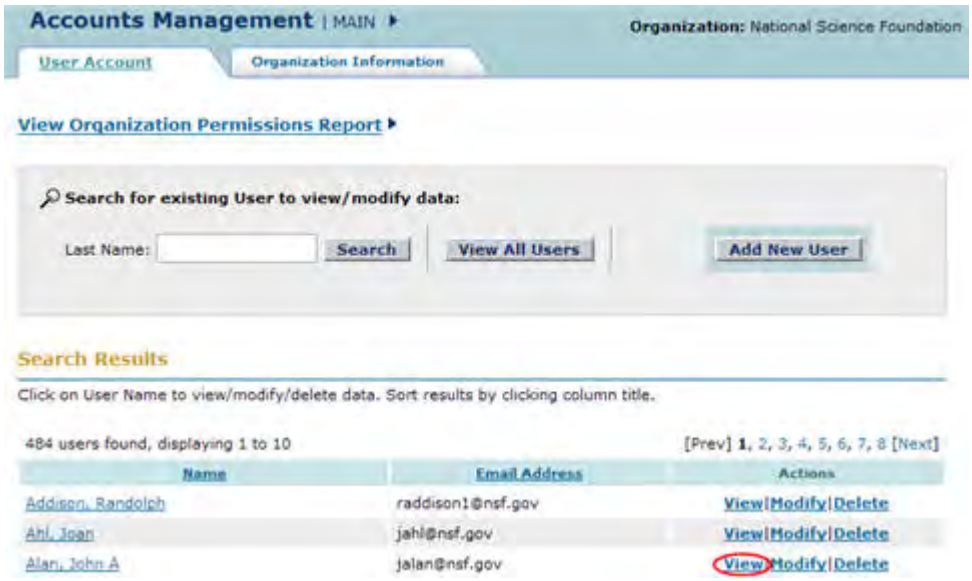


Figure 1 Accounts Management screen. The View link is circled.

2. On the **Accounts Management** screen on the **User Account** tab (Figure 1), click **View** on the row for the user whose profile you want to view. The **View User Profile** screen displays (Figure 2) with the individual's profile. The **View User Profile** screen also shows your own SPO permissions. You have these options on this screen:

- Modify the user profile
- Delete the user

Figure 2 View User Profile screen. Modify User button is circled.

Modify the User Profile

1. On the **View User Profile** screen (Figure 2), click the **Modify User** button. The **Modify User Profile** screen displays (Figure 3).

Figure 3 Modify User Profile screen. The Modify User button is circled.

2. Modify the user profile as you require (see Add a User, Step 3 through Step 8 for instructions on the different sections of the user profile).
3. Click the **Modify User** button (Figure 3). The **View Modify User Profile** screen displays (Figure 4).

Figure 4 View Modify User Profile screen. The Confirm Changes button is circled.

4. Click the **Confirm Changes** button (Figure 4). The **Confirmation** screen displays (Figure 5).

Figure 5 Confirmation screen. The Account Management Main link is circled.

5. Click **Account Management Main** (Figure 5). The **Accounts Management** screen displays on the **User Account** tab.

Delete the User

1. On the **View User Profile** screen (Figure 6), click the **Delete User** button. The **Delete User Data** screen displays (Figure 7) with a message for you to confirm that you want to delete the user.

Figure 6 View User Profile screen. The Delete User button is circled.

Figure 7 Delete User Data screen. The Delete User button is circled.

2. Click the **Delete User** button (Figure 7). The **Confirmation** screen displays (Figure 8) with the message that the individual is deleted as a user of your organization.

Figure 8 Confirmation screen. The Account Management Main link is circled.

3. Click **Account Management Main** (Figure 8). The **Accounts Management** screen displays on the **User Account** tab.

Add a User

1. Access the **Accounts Management** screen on the **User Account** tab (Figure 1) (see Access Accounts Management).

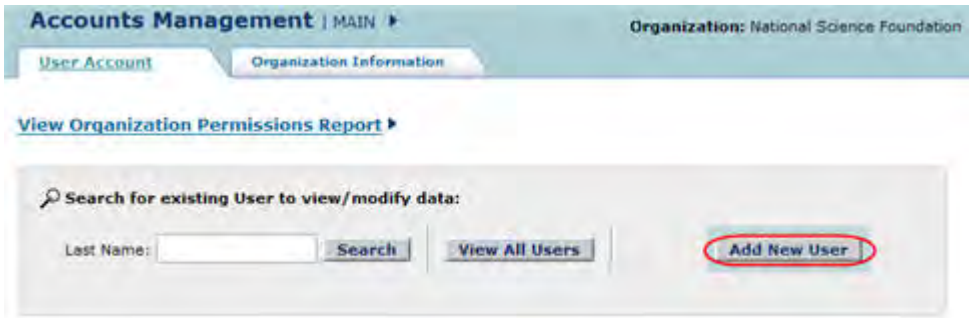


Figure 1 Accounts Management screen. The Add New User button is circled.

2. On the **Accounts Management** screen on the **User Account** tab (Figure 1), click the **Add New User** button. The **Add New User** screen displays (Figure 2).

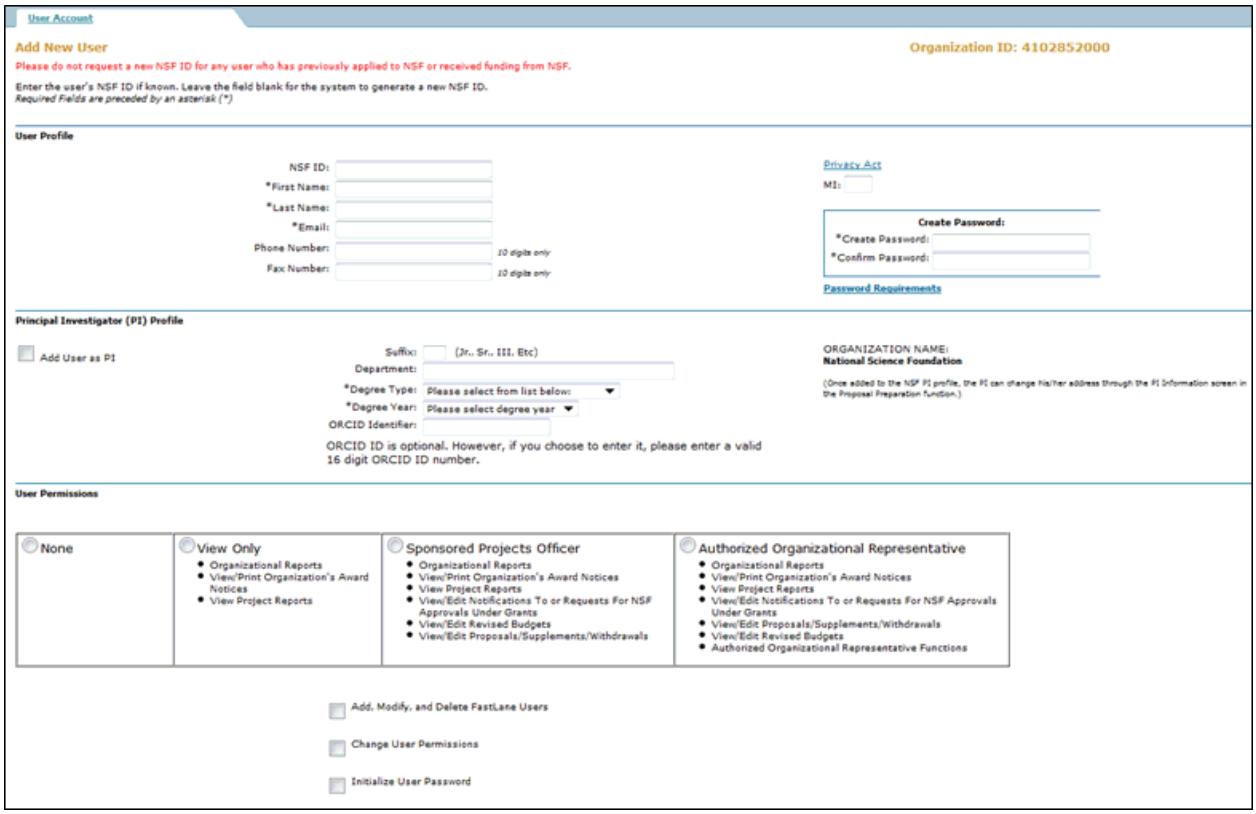


Figure 2 Add New User screen.

3. In the **User Profile** section (Figure 2), do the following:
   - In the **NSF ID** box, type the new user's NSF ID if known (optional). (*If you do not know the user's NSF ID, or the individual is a new FastLane user, leave the box blank and system will provide an NSF ID.*)
   - In the **First Name** box, type the user's first name.
   - In the **Last Name** box, type the user's last name.
   - In the **Email** box, type the user's correct email address.
   - In the **Phone Number** box, type the user's phone number (optional).
   - In the **Fax Number** box, type the user's fax number (optional).
4. In the **Create a Password** section (Figure 2), create a password for the new user (a password must be 6 to 20 characters and have 1 alpha and 1 numeric character):
   - In the **Create a Password** box, type a password.
   - In the **Confirm Password** box, type the password again.
5. *If the new user will be preparing proposals and functioning as the Principal Investigator*, complete the **Principal Investigator (PI) Profile** section (Figure 2):
   - Click the **Add as a PI** check mark box.
   - In the **Suffix** box, type any suffix for the individual (optional).
   - Select a department from the **Department** drop-down list (optional).
   - Select a degree type from the **Degree** drop-down list.
   - Select a degree year from the **Degree Year** drop-down list.

   Note: PIs do not require user permissions for Research Administration to conduct their work as a PI. PIs work in the Proposals, Awards, and Status application of FastLane.

6. In the **User Permissions** section (Figure 2), click the check mark box for any permission that you want to assign to the new user.

   Note: The permissions that display depend upon the type of your organization registered with NSF. GRFP permissions display only for FastLane users (with applicable permissions) that are members of organizations that have active GRFP Fellows. The following conditions apply in assigning GRFP permissions:
   - You are required to assign one user (either new or existing) as a (primary) GRFP Coordinating Official (CO). If you have this responsibility in multiple organizations, you are required to choose one (primary) CO for each organization.
   - Alternate CO permissions can be granted to any number of users, but only one user can be granted the (primary) CO permission for each organization.
   - To remove a user with (primary) CO permission, another user must be assigned as (primary) CO first. Then the previous (primary) CO can be removed from the user or permission list.

   Note: *If someone in your organization is authorized to sign and submit proposals and other documents that require electronic signature,* you must give that person the permission for Authorized Organizational Representative Functions.

7. *If the **GRFP Permission** section displays* (Figure 2), click on a check mark box if you want to give the new user a GRFP permission. See Note above for conditions for applying permissions for GRFP.
8. Click the **Add User** button (Figure 2). The **View Add User Profile** screen displays (Figure 3) with the profile information and permissions of the new user.

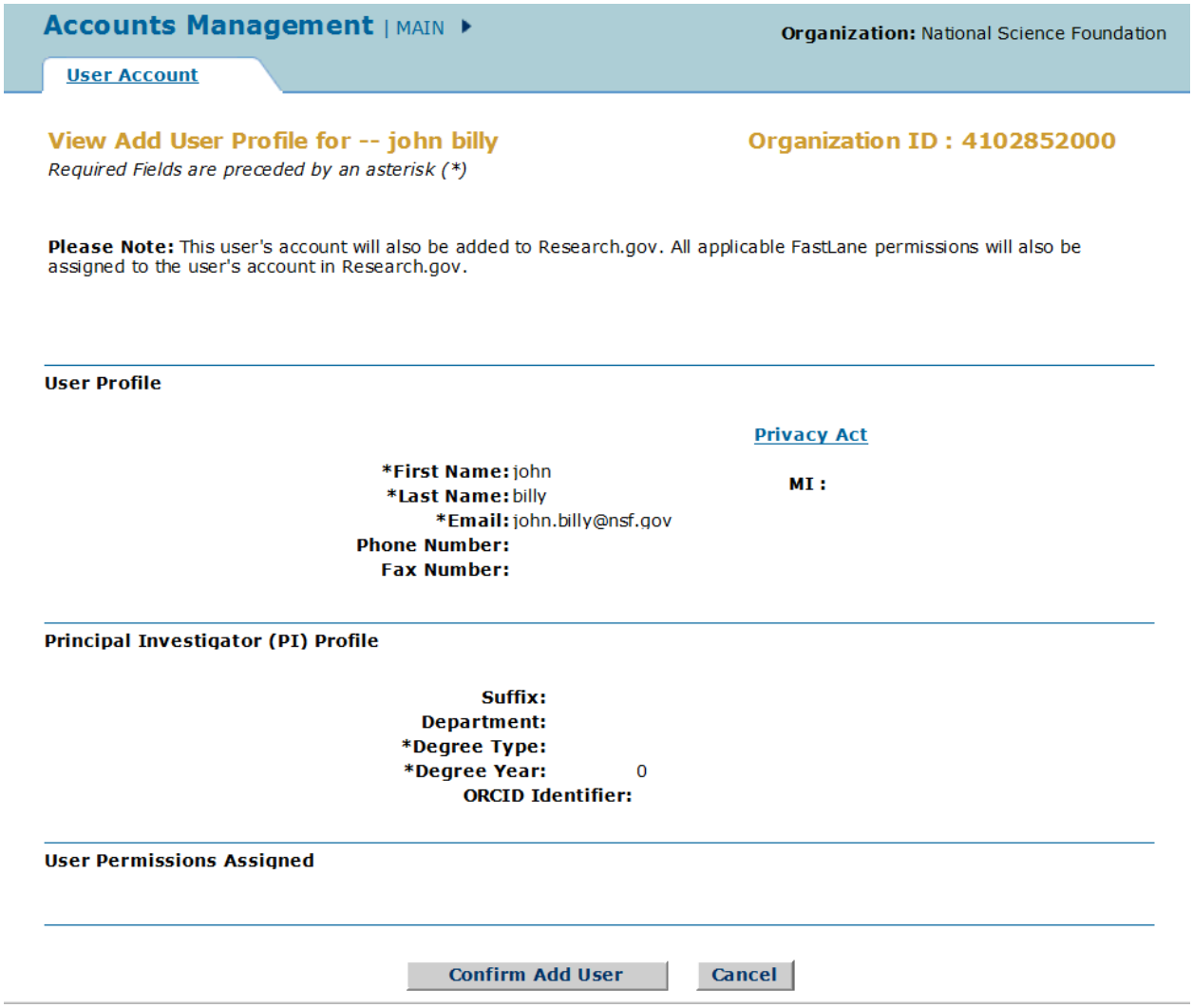


Figure 3 View Add User Profile screen.

9. Click the **Confirm Add User** button (Figure 3). The **Confirmation** screen displays (Figure 4).

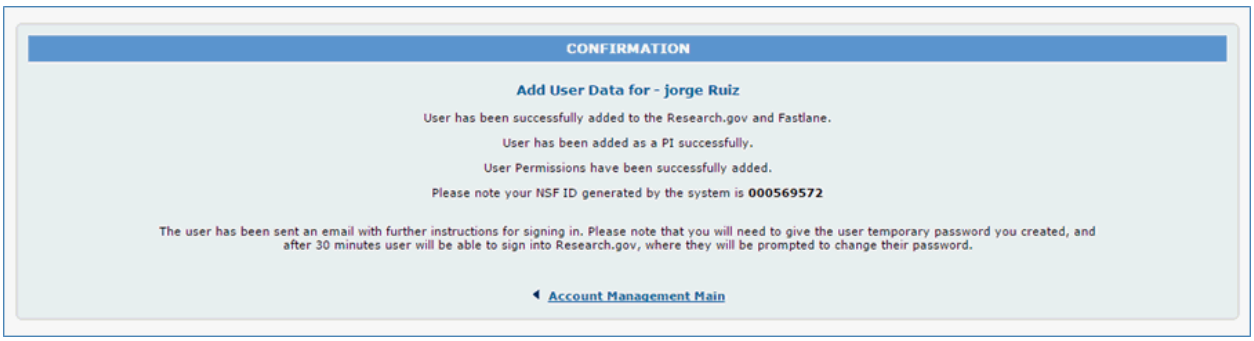


Figure 4 Confirmation screen. The Account Management Main link is circled.

10. Click **Account Management Main** (Figure 4). The **Accounts Management** screen displays on the **User Account** tab (Figure 1).

Modify a User Profile

1. Access the **Accounts Management** screen on the **User Account** tab with a user name in the **Search Results** section (Figure 1) (see Search for a User or View All Users).

Figure 1 Accounts Management screen. The Modify link is circled.

2. On the **Accounts Management** screen on the **User Account** tab (Figure 1), click **Modify** on the row for the user whose profile you want to modify. The **Modify User Profile** screen displays (Figure 2).

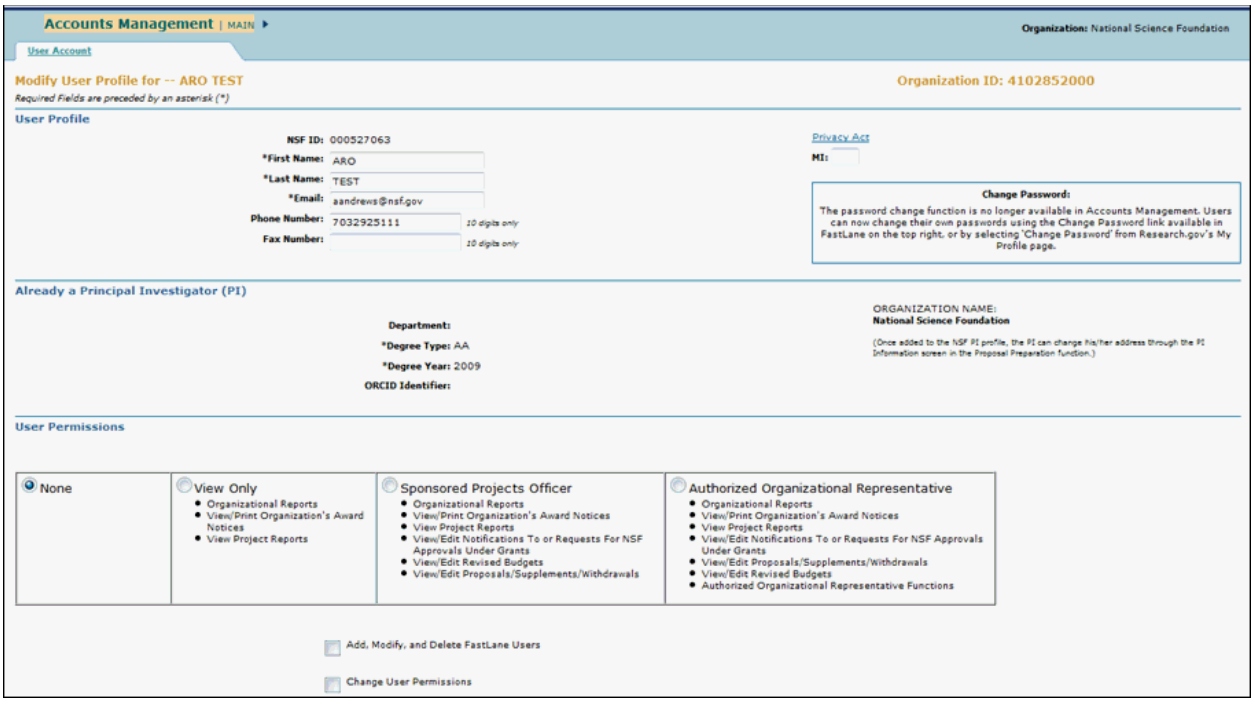


Figure 2 Modify User Profile screen. The Modify User button is circled.

3. Modify the user profile as you require (see Add a User, Step 3 through Step 8 for instructions on the different sections of the user profile).
4. Click the **Modify User** button (Figure 2). The **View Modify User Profile** screen displays (Figure 3).

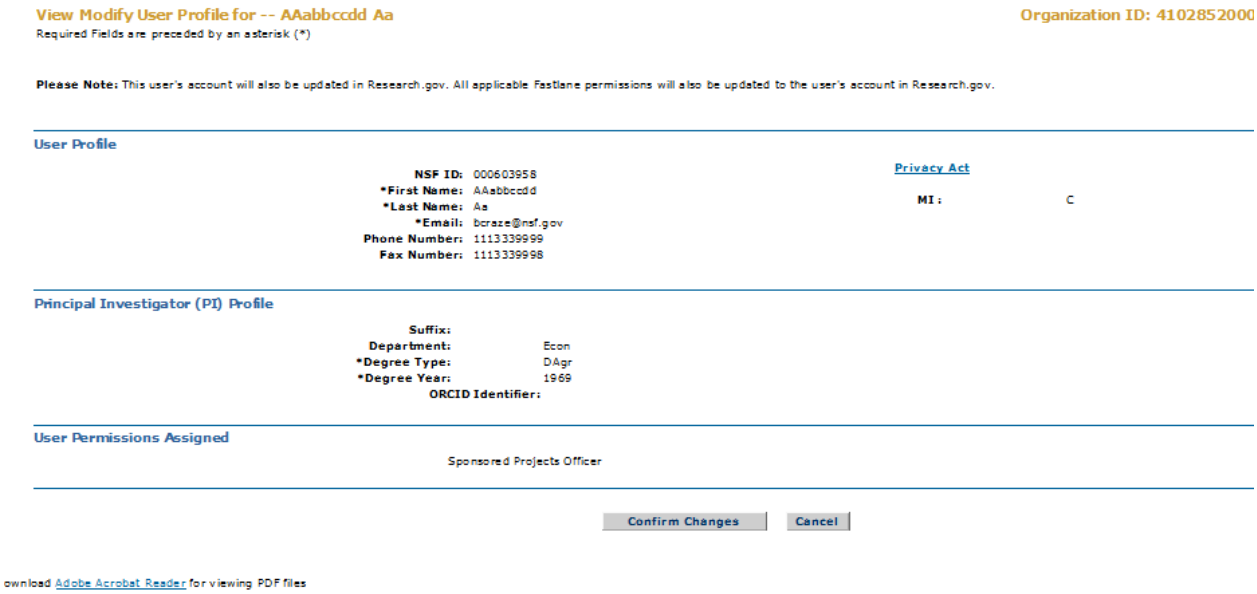


Figure 3 View Modify User Profile screen. The Confirm Changes button is circled.

5. Click the **Confirm Changes** button (Figure 3). The **Confirmation** screen displays (Figure 4).

Figure 4 Confirmation screen. The Account Management Main link is circled.

6. Click **Account Management Main** (Figure 4). The **Accounts Management** screen displays on the **User Account** tab.

Delete a User

1. Access the **Accounts Management** screen on the **User Account** tab with a user name in the **Search Results** section (Figure 1) (see Search for a User or View All Users).

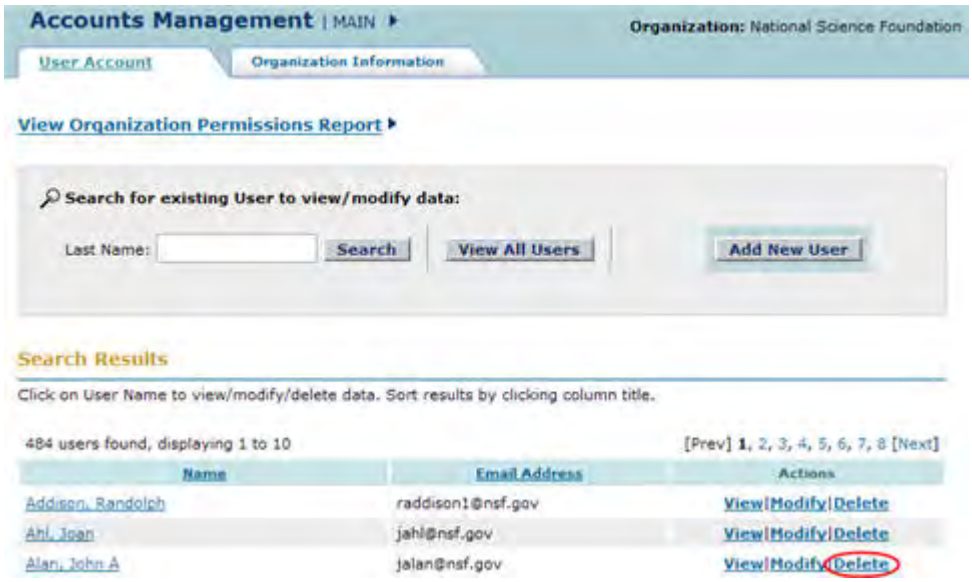


Figure 1 Accounts Management screen. The Delete link is circled.

2. On the **Accounts Management** screen on the **User Account** tab (Figure 1), click **Delete** on the row for the user you want to delete. The **Delete User Data** screen displays (Figure 2) with a message for you to confirm that you want to delete the user.

Figure 2 Delete User Data screen. The Delete User button is circled.

3. Click the **Delete User** button (Figure 2). The **Confirmation** screen displays (Figure 3) with the message that the individual has been deleted as a user from your organization.

Figure 3 Confirmation screen. The Account Management Main link is circled.

4. Click **Account Management Main** (Figure 3). The **Accounts Management** screen displays on the **User Account** tab.

View the Organization Permissions Report

1. Access the **Accounts Management** screen on the **User Account** tab (Figure 1) (see Access Accounts Management).

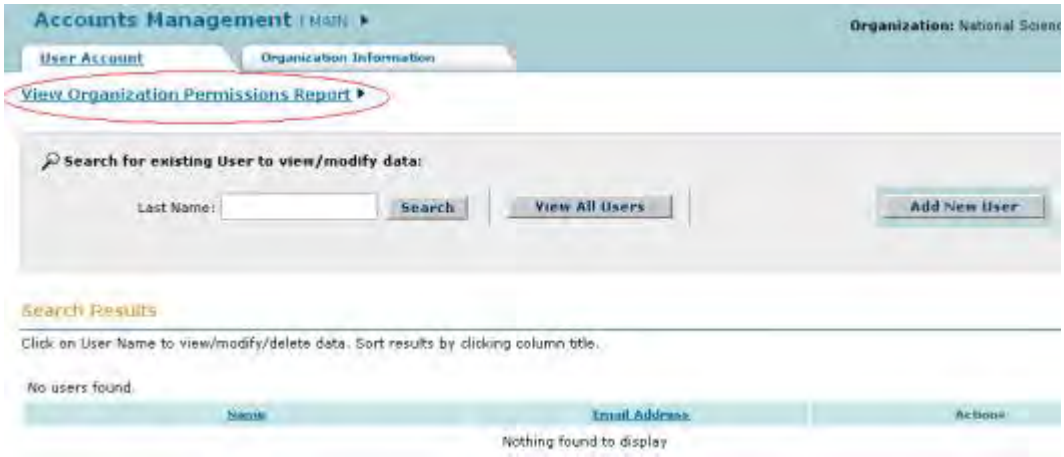


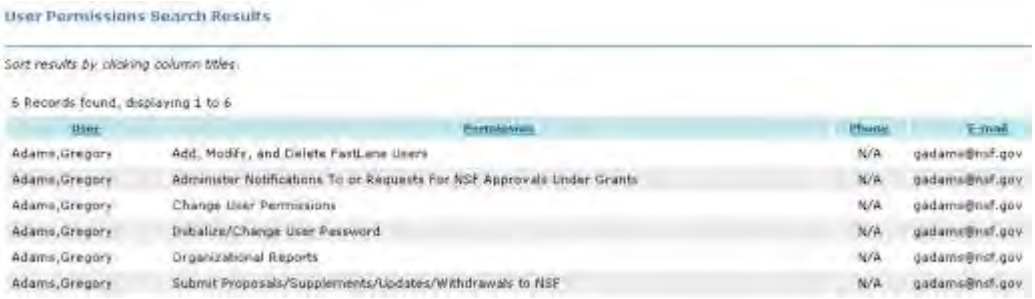
Figure 1 Accounts Management screen on the User Account tab. The View Organization Permissions Report link is circled.

2. On the **Accounts Management** screen on the **User Account** tab (Figure 1), click **View Organization Permissions Request**. The **Organizations Permission Report** screen displays (Figure 2), where you have the following options:
   - View permissions for selected users
   - View users for selected permissions
   - View a full report of all permissions for all users

Figure 2 Organization Permissions Report screen. Three user names and All Permissions are highlighted. The Continue button is circled.

View Permissions for Selected Users

1. On the **Organization Permissions Report** screen (Figure 2), from the **Select Users** list (Figure 2), highlight the users whose permissions you want to view or highlight All Users.
2. From the **Select Permissions** list (Figure 2), highlight All Permissions.
3. Click the **Continue** button (Figure 2). The **User Permissions Search Results** screen displays (Figure 3) showing the permissions for each selected user.



User Permissions Search Results

Sort results by clicking column titles.

6 Records found, displaying 1 to 6

User	Permissions	Phone	E-mail
Adams,Gregory	Add, Modify, and Delete FastLane Users	N/A	gadams@nsf.gov
Adams,Gregory	Administer Notifications To or Requests For NSF Approvals Under Grants	N/A	gadams@nsf.gov
Adams,Gregory	Change User Permissions	N/A	gadams@nsf.gov
Adams,Gregory	Initialize/Change User Password	N/A	gadams@nsf.gov
Adams,Gregory	Organizational Reports	N/A	gadams@nsf.gov
Adams,Gregory	Submit Proposals/Supplements/Updates/Withdrawals to NSF	N/A	gadams@nsf.gov

Figure 3 User Permissions Search Results screen with a listing of the permissions for one of the individuals whose names were highlighted. The other individuals whose names were highlighted have no permissions.

View Users for Selected Permissions

1. On the **Organization Permissions Report** screen (Figure 4), from the **Select Permissions** list (Figure 4), highlight the permissions for which you want to see the users.

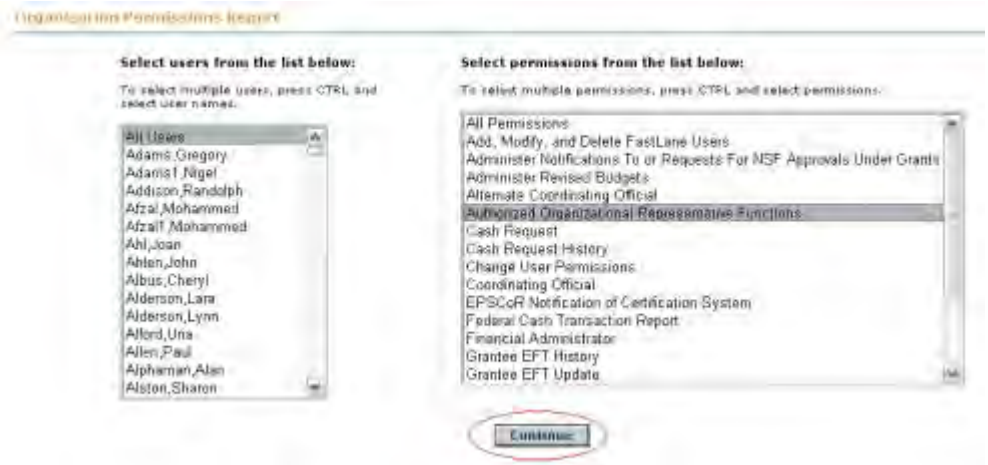


Figure 4 Organization Permissions Report screen. All Users and the Authorized Organizational Representative Functions permission are highlighted. The Continue button is circled.

2. From the **Select Users** list (Figure 4), highlight All Users.
3. Click the **Continue** button (Figure 4). The **User Permissions Search Results** screen displays (Figure 5) showing the users for the highlighted permission.

User	Permissions	Phone	E-mail
Albus,Cheryl	Authorized Organizational Representative Functions	703-292-7051	calbus@nsf.gov
Alderson,Lara	Authorized Organizational Representative Functions	703-747-2345	lalderson@beeringpoint.net
Alderson,Lynn	Authorized Organizational Representative Functions	N/A	lynnald@hotmail.com
Allen,Paul	Authorized Organizational Representative Functions	N/A	paul.allen@nsf.gov
Alphaman,Alan	Authorized Organizational Representative Functions	123-456-7890	ref2@test.com
Aortester,Alpha	Authorized Organizational Representative Functions	111-111-1111	kchetle@nsf.gov
B-thomas,Evelyn	Authorized Organizational Representative Functions	703-292-4204	ebthomas@nsf.gov
Bailey,Charlett	Authorized Organizational Representative Functions	N/A	cbailey@nsf.gov
Bailey-thomas,Evelyn	Authorized Organizational Representative Functions	703-306-1145	ebailey@nsf.gov
Bailey,Ellena	Authorized Organizational Representative Functions	703-306-1152	ebailey@nsf.gov

Figure 5 Organization Permissions Search Results screen listing all users who have the Authorized Organizational Representative Functions permission.

View All Permissions for All Users

1. On the **Organization Permissions Report** screen (Figure 6), from the **Select Permissions** list (Figure 6), highlight All Permissions.

Figure 6 Organization Permissions Report screen. All Users and All Permissions are highlighted. The Continue button is circled.

2. From the **Select Users** list (Figure 6), highlight All Users.
3. Click the **Continue** button (Figure 6). The **User Permissions Search Results** screen displays (Figure 7) showing the permissions for all users, who are listed in alphabetical order.

User	Permission	Phone	E-mail
Adams,Gregory	Add, Modify, and Delete FastLane Users	N/A	gadams@nsf.gov
Adams,Gregory	Administer Notifications To or Requests For NSF Approvals Under Grants	N/A	gadams@nsf.gov
Adams,Gregory	Change User Permissions	N/A	gadams@nsf.gov
Adams,Gregory	Initialize/Change User Password	N/A	gadams@nsf.gov
Adams,Gregory	Organizational Reports	N/A	gadams@nsf.gov
Adams,Gregory	Submit Proposals/Supplements/Updates/Withdrawals to NSF	N/A	gadams@nsf.gov
Adams1,Nigel	Organizational Reports	N/A	nadams@nsf.gov
Afzal,Mohammed	Add, Modify, and Delete FastLane Users	703-428-3422	mafzal@nsf.gov
Afzal,Mohammed	Administer Notifications To or Requests For NSF Approvals Under Grants	703-428-3422	mafzal@nsf.gov
Afzal,Mohammed	Administer Revised Budgets	703-428-3422	mafzal@nsf.gov

Figure 7 User Permissions Search Results screen with a listing of all users in alphabetical order and with the permissions listed for each user.

Revise Organization Information

Note: If you need to change the name of your organization, see Change Organization Name for instructions.

1. Access the **Accounts Management** screen on the **User Account** tab (Figure 1) (see Access Accounts Management).

Figure 1 Accounts Management screen on the User Account tab. The Organization Information tab is circled.

2. On the **Accounts Management** screen (Figure 1), click the **Organization Information** tab. The **Revise Information** screen displays (Figure 2).

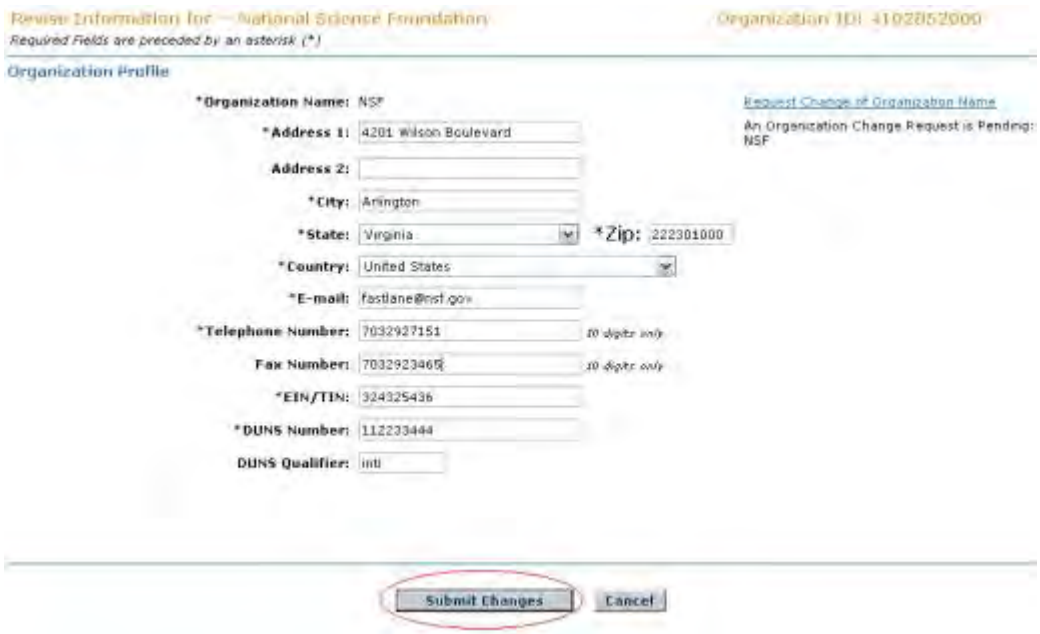


Figure 2 Revise Information screen. The Submit Changes button is circled.

3. In the boxes (Figure 2), revise the information as you require.
4. Click the **Submit Changes** button (Figure 2). The **Revise Information** screen displays (Figure 3) again with the revised organization information.

Figure 3 Revise Information screen with the revisions. The Confirm Changes button is circled.

5. Click the **Confirm Changes** button (Figure 3). The **Confirmation** screen displays (Figure 4) with a message that the organization information has been revised.

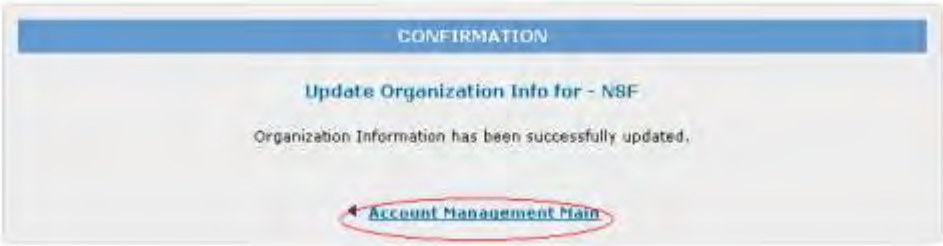


Figure 4 Confirmation screen. The Account Management Main link is circled.

6. Click **Account Management Main** (Figure 4). The **Accounts Managements** screen displays on the **User Account** tab.

Change the Organization Name

Note: If you need to revise other organization information, see Revise Organization Information for instructions.

1. Access the **Accounts Management** screen on the **User Account** tab (Figure 1) (see Access Accounts Management).

Figure 1 Accounts Management screen on the User Account tab. The Organization Information tab is circled.

2. On the **Accounts Management** screen on the **User Account** tab (Figure 1), click the **Organization Information** tab. The **Revise Information** screen displays (Figure 2).

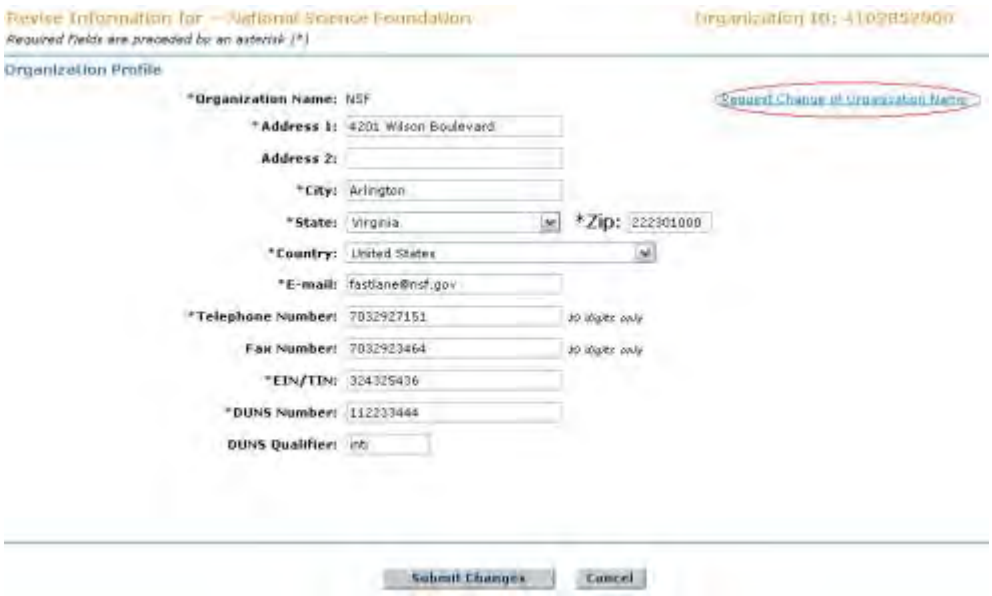


Figure 2 Revise Information screen. The Request Change of Organization Name link is circled.

3. Click **Request Change of Organization Name** (Figure 2). The **Request Change of Organization Name** screen displays (Figure 3).

Figure 3 Request Change of Organization Name screen. The Submit Request button is circled.

4. In the **New Name of Organization** box (Figure 3), type the new name.
5. In the **Short Name** box (Figure 3), type the short name of the organization (optional).
6. In the **Award Letter Email Address** (Figure 3), type the email address of the individual who receives award letters.
7. In the **Recipient Name** box (Figure 3), write the name of the email recipient (optional).
8. In the **Additional Comments** box (Figure 3), type or copy and paste any additional information that you want to convey on the organization's name change.
9. Click the **Submit Request** button (Figure 3). The **Confirmation** screen displays (Figure 4) with the message that your organization name change has been submitted to NSF.

Figure 4 Confirmation screen. The Account Management link is circled.

10. Click **Account Management Main** (Figure 4). The **Accounts Management** screen displays on the **User Account** tab.

Check the Status of an Organization Name Change

1. Access the **Accounts Management** screen on the **User Account** tab (Figure 1) (see Access Accounts Management).

Figure 1 Accounts Management screen on the User Account tab. The Organization Information tab is circled.

2. On the **Accounts Management** screen on the **User Account** tab (Figure 1), click the **Organization Information** tab. If NSF has not yet approved a name change request, the **Revise Information** screen displays as in Figure 2 with a message that the name change is pending. If a name change request has been approved, the screen displays without the message. You can still submit a new name request if a previous request is still pending (see Change the Organization Name for instructions).

Figure 2 Revise Information screen. Circled is the message that an organization change request is pending, along with the new name.

Financial Representative Information

1. Access the **Accounts Management** screen on the **User Account** tab (Figure 1) (see Access Accounts Management).

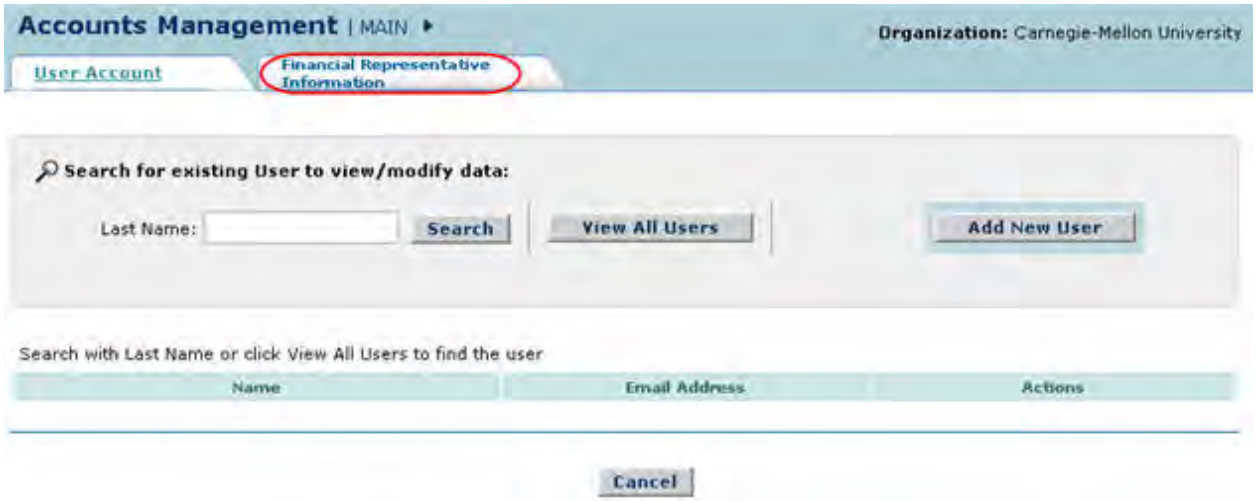


Figure 1 Accounts Management screen on the User Account tab. The Financial Representative Information tab is circled.

2. On the **Accounts Management** screen on the **User Account** tab (Figure 1), click the **Financial Representative Information** tab.
3. Fill in the information for up to three Financial Representatives in the available fields (Figure 2).

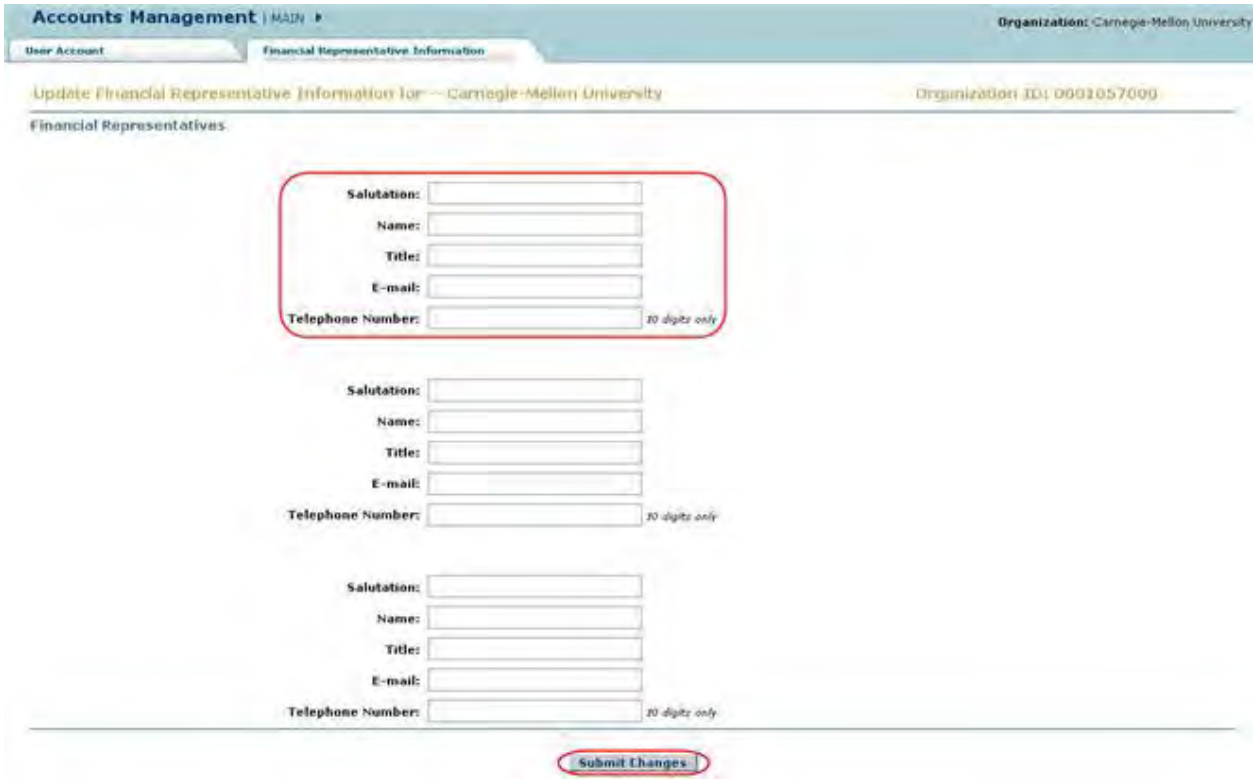


Figure 2 The Financial Representative Information page. The fields for one of the Financial Representatives and the Submit button are circled.

4. Once the necessary information for one to three Financial Representatives has been filled out click the **Submit** button (Figure 2).

Organizational Reports

Organizational Reports Introduction

In Organizational Reports, you can view basic information about the activity of your organization with NSF.

In Organizational Reports, you can view the following:

- Recent proposals
  Search for proposals and check their status
- Active awards
  Search for awards with the option to view the abstract for an award
- Continuing Grant Increments
  Check continuation funding status
- Organizational Permissions Report
  View the permissions for your organization's users
  (Click on a link above for the instructions for that option.)

See Access Organizational Reports for instructions to begin working on Organizational Reports.

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See Access Organizational Reports for instructions to begin working on Organizational Reports.

Access Organizational Reports

1. Access the **Research Administration** screen (Figure 1) (see Log In to SPO Functions).

Figure 1 Research Administration screen. The Organizational Reports link is circled.

2. On the **Research Administration** screen (Figure 1), click **Organizational Reports**. The **Organizational Reports** screen displays (Figure 2).

Figure 2 Organizational Reports screen.

3. In the **Select Organization Name** drop-down list (Figure 2), select the organization whose reports you want to view.
4. In the **Indicate Report Type** section (Figure 2), you have options to view the following:
    - Recent proposals
    - Active awards listing
    - Continuing Grant Increments
    - Organizational Permissions Report

    (Click on a link above for instructions for that option.)

View Recent Proposals Reports

1. Access the **Organizational Reports** screen (Figure 1) (see Access Organizational Reports).

Figure 1 Organizational Reports screen.

2. On the **Organizational Reports** screen (Figure 1), click the radio button for Recent Proposals.
3. Click the **Continue** button (Figure 1). The **Recent Proposals** screen displays (Figure 2).

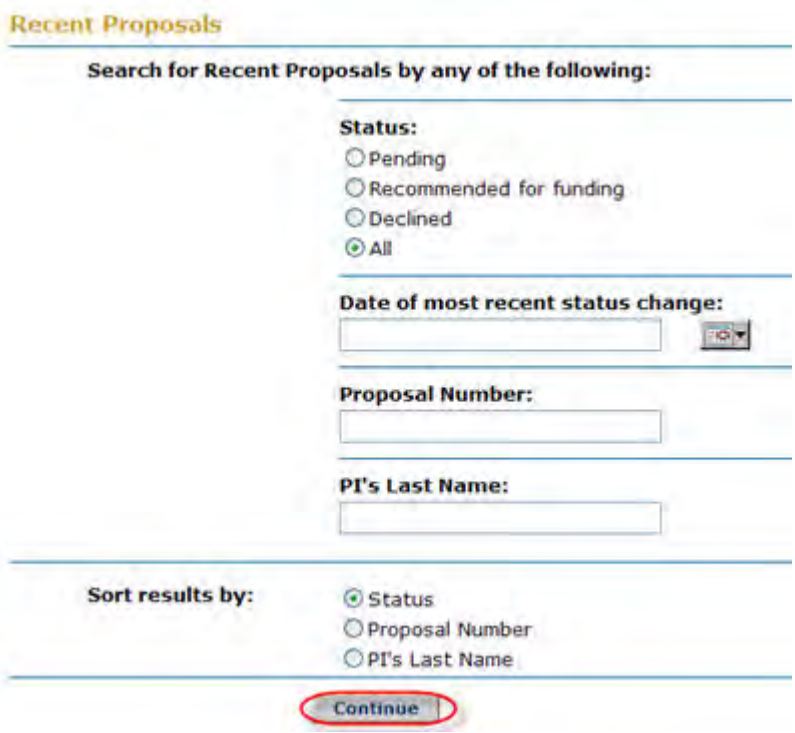
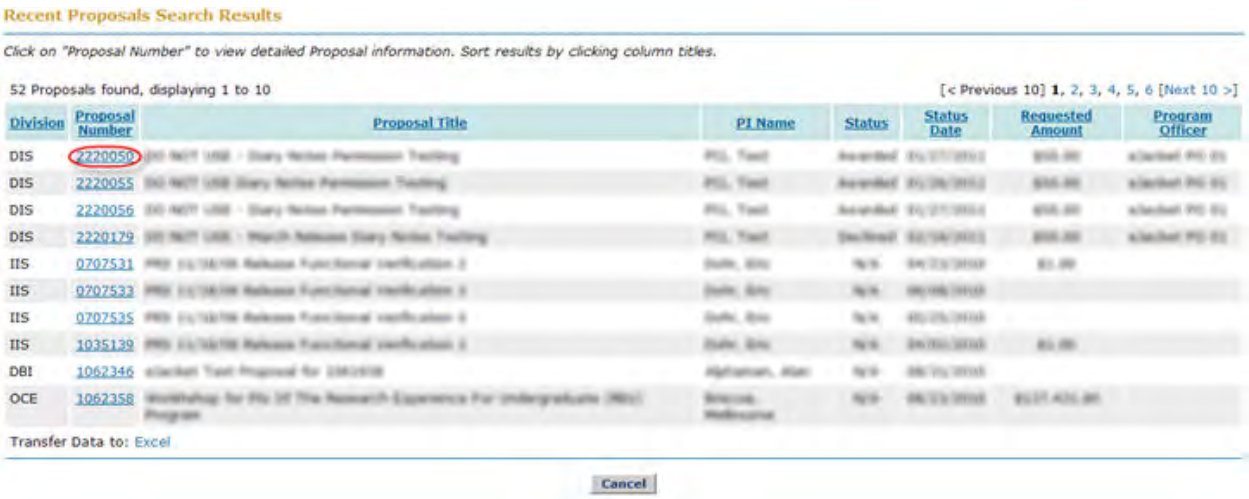


Figure 2 Recent Proposals screen. The Continue button is circled.

4. In the **Search for Recent Proposals** section (Figure 2), search for proposals by any of these criteria:
   - **Status**
   Click a radio button for a status criterion.
   - **Date of most recent status change**
   Type the date of the latest status change (in mm/dd/yyyy format).
   - **Proposal number**
   Type the proposal number.
   - **PI's last name**
   Type the last name of a PI.
5. In the **Sort Results By** section (Figure 2), click a radio button for one of the sort criteria.
6. Click the **Continue** button (Figure 2). The **Recent Proposals Search Results** screen displays (Figure 3) with a listing of recent proposals.



Recent Proposals Search Results

Click on "Proposal Number" to view detailed Proposal information. Sort results by clicking column titles.

52 Proposals found, displaying 1 to 10 [< Previous 10] 1, 2, 3, 4, 5, 6 [Next 10 >]

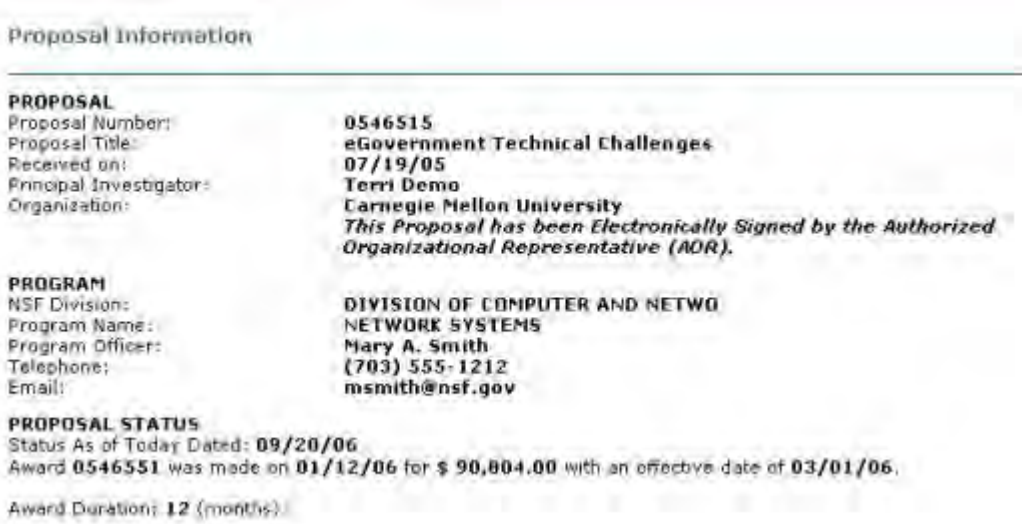
Division	Proposal Number	Proposal Title	PI Name	Status	Status Date	Requested Amount	Program Officer
DIS	2220050	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
DIS	2220055	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
DIS	2220056	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
DIS	2220179	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
IIS	0707531	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	
IIS	0707533	[illegible]	[illegible]	[illegible]	[illegible]		
IIS	0707535	[illegible]	[illegible]	[illegible]	[illegible]		
IIS	1035139	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	
DBI	1062346	[illegible]	[illegible]	[illegible]	[illegible]		
OCE	1062358	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	

Transfer Data to: Excel

Cancel

Figure 3 Recent Proposals Search Results screen. The proposal number is circled for a proposal.

7. To see detailed information on a proposal, select the proposal number (Figure 3) on the row for the proposal whose information you want to see. The **Proposal Information** screen displays (Figure 4) with the information.



Proposal Information

PROPOSAL

Proposal Number:	**0546515**
Proposal Title:	**eGovernment Technical Challenges**
Received on:	**07/19/05**
Principal Investigator:	**Terri Demo**
Organization:	**Carnegie Mellon University**
	This Proposal has been Electronically Signed by the Authorized Organizational Representative (AOR).

PROGRAM

NSF Division:	**DIVISION OF COMPUTER AND NETWO**
Program Name:	**NETWORK SYSTEMS**
Program Officer:	**Mary A. Smith**
Telephone:	**(703) 555-1212**
Email:	**msmith@nsf.gov**

PROPOSAL STATUS

Status As of Today Dated: **09/20/06**

Award **0546551** was made on **01/12/06** for **$ 90,804.00** with an effective date of **03/01/06**.

Award Duration: **12** (months).

Figure 4 Proposal Information screen.

View Active Awards

1. Access the **Organizational Reports** screen (Figure 1) (see Access Organizational Reports).

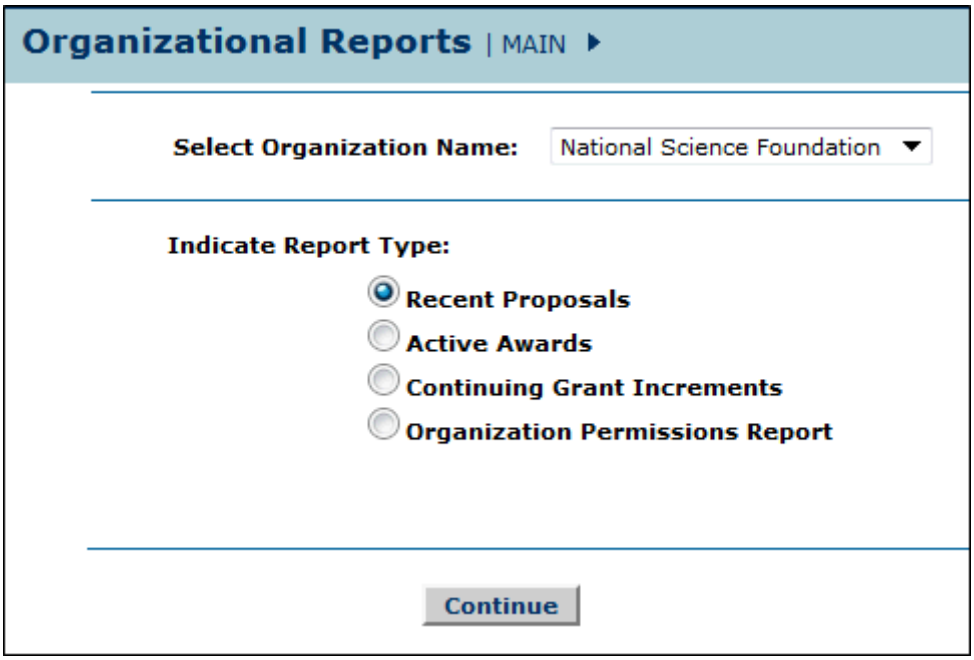


Figure 1 Organizational Reports screen.

2. On the **Organizational Reports** screen (Figure 1), select the radio button for Active Awards.
3. Select the **Continue** button (Figure 1). The **Active Awards** screen displays (Figure 2).

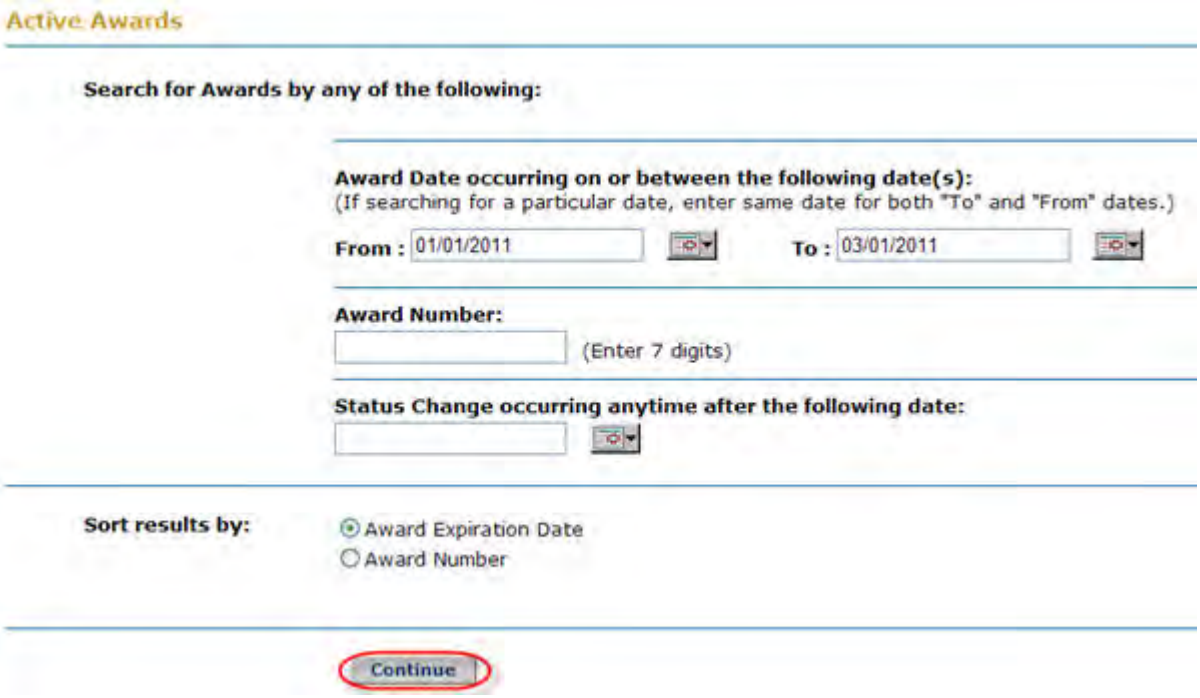


Figure 2 Active Awards screen. The Continue button is circled.

4. In the **Search for Awards** section (Figure 2), search for active awards by any of the following criteria:
   - **Date range**
     - In the **From** box, enter the beginning date for the range (in mm/dd/yyyy format).
     - In the **To** box, enter the ending date for the range (in mm/dd/yyyy format).
   - **Award number**
     - In the **Award** number box, type the award number.
   - **Status change**
     - In the **Status Change Occurring Anytime After this Date** box, type the date after which the status change occurred (in mm/dd/yyyy format).
5. In the **Sort Results By** section (Figure 2), click the radio button for one of the sorting criteria:
   - **Award End Date**
   - **Award Number**
6. Select the **Continue** button (Figure 2). The **Active Awards Search Results** screen displays (Figure 3) with a listing of the active awards that match your search criteria.

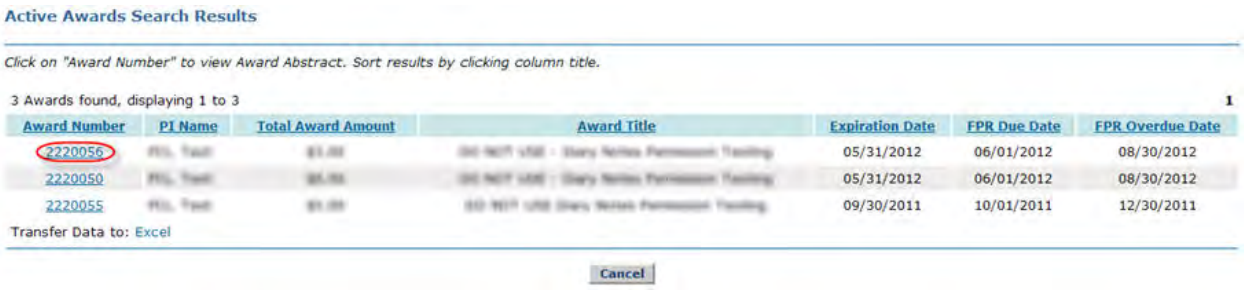


Figure 3 Active Awards Search Results screen. An award number is circled for an active award.

7. Select a column heading (Figure 3) to view the active awards ordered by that category.
8. To view the abstract for an active award, select the award number (Figure 3) on the row for the active award whose abstract you want to view. The **NSF Award Abstract** screen displays (Figure 4) with the award abstract.

Figure 4 NSF Award Abstract screen.

View Continuing Grant Increments

1. Access the **Organizational Reports** screen (Figure 1) (see Access Organizational Reports).

Figure 1 Organizational Reports screen.

2. On the **Organizational Reports** screen (Figure 1), select the radio button for Continuing Grant Increments.
3. Select the **Continue** button (Figure 1). The **Continuing Grant Increments** screen displays (Figure 2).

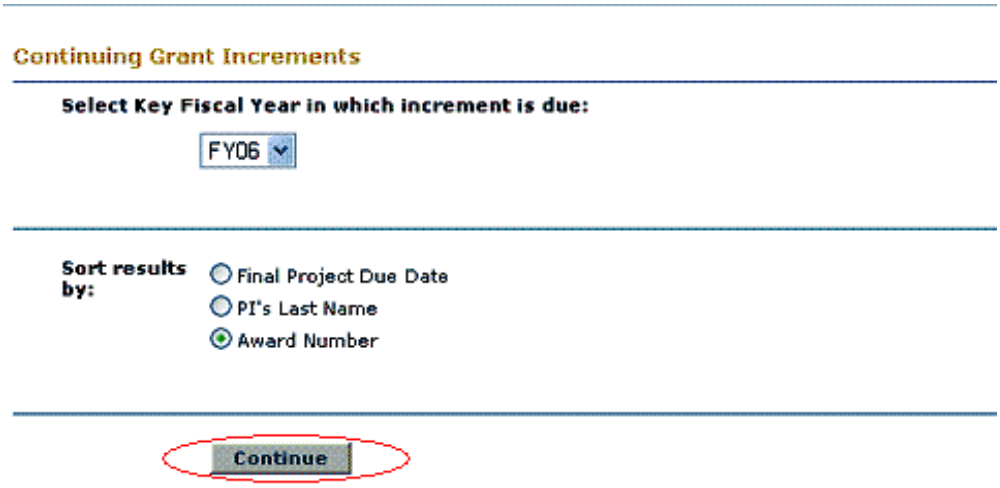


Figure 2 Continuing Grant Increments screen. The Continue button is circled.

4. In the **Select Key Fiscal Year in which Increment Is Due** drop-down box (Figure 2), select the fiscal year for the award you want to check.
5. In the **Sort Results By** list (Figure 2), select a radio button (Figure 2) for a criterion to sort the awards by:
   - **Final Project Due Date**
   - **PI's Last Name**
   - **Award Number**
6. Select the **Continue** button (Figure 2). The **Search Results for Awards by Continuing Grant Increments** screen displays (Figure 3) with a listing of the awards that meet your search criteria.

Search Results for Awards by Continuing Grant Increments FY07

Click on "Award Number" link to view details for the Awards' Project Report(s). Sort results by clicking column titles.

124 Awards found, displaying 1 to 10 [< Previous 10] 1, 2, 3, 4, 5, 6, 7, 8, 9, 10 [Next 10 >]

Award Number	PI Name	Award Title	Date of Next Increment Expected	Increment Amount
0002930	Demo, Terry	BIO Research Training Group Program: Biology in Small Populations	12/31/2007	$80,000.00
0002931	Demo, Terry	Experimental and Theoretical Studies on the Structure of Highly Preheated Air Flames	12/31/2007	$60,000.00
0002932	Demo, Terry	BIO Research Training Group Program: Biology in Small Populations	12/31/2007	$80,000.00
0002933	Demo, Terry	Experimental and Theoretical Studies on the Structure of Highly Preheated Air Flames	12/31/2007	$60,000.00
0002934	Demo, Terry	BIO Research Training Group Program: Biology in Small Populations	12/31/2007	$80,000.00
0002935	Demo, Terry	Experimental and Theoretical Studies on the Structure of Highly Preheated Air Flames	12/31/2007	$60,000.00

Figure 3 Search Results for Awards by Continuing Grant Increments screen. An award number is circled.

7. Select the link for the award number (Figure 3) that you want to view a report for. The **Continuing Grant Increments** screen displays (Figure 4).

Continuing Grants Increments FY07 Project Report: Award #0002930

Click on "Report Number" link to view the Project Report in PDF format (opens in same window)
Report Numbers without links denote reports that has not yet been submitted. Sort results by clicking column titles.

1 Report found. 1

Report Number	NSF Report Status	PI Submission Status	Report Period Start Date	Report Period End Date	Report Due Date	Report Overdue Date	Submission Date
8910111	Due	Not Submitted	05/02/2006	04/30/2007	01/30/2007	05/01/2007	--

Transfer Data to: Excel

Figure 4 Continuing Grant Increments screen. A report number is circled.

8. Select the report number link for the report you want to view (Figure 4). A screen displays (Figure 5) with the report contents in PDF format. If you need to download Adobe Reader, see Adobe Reader for FastLane.

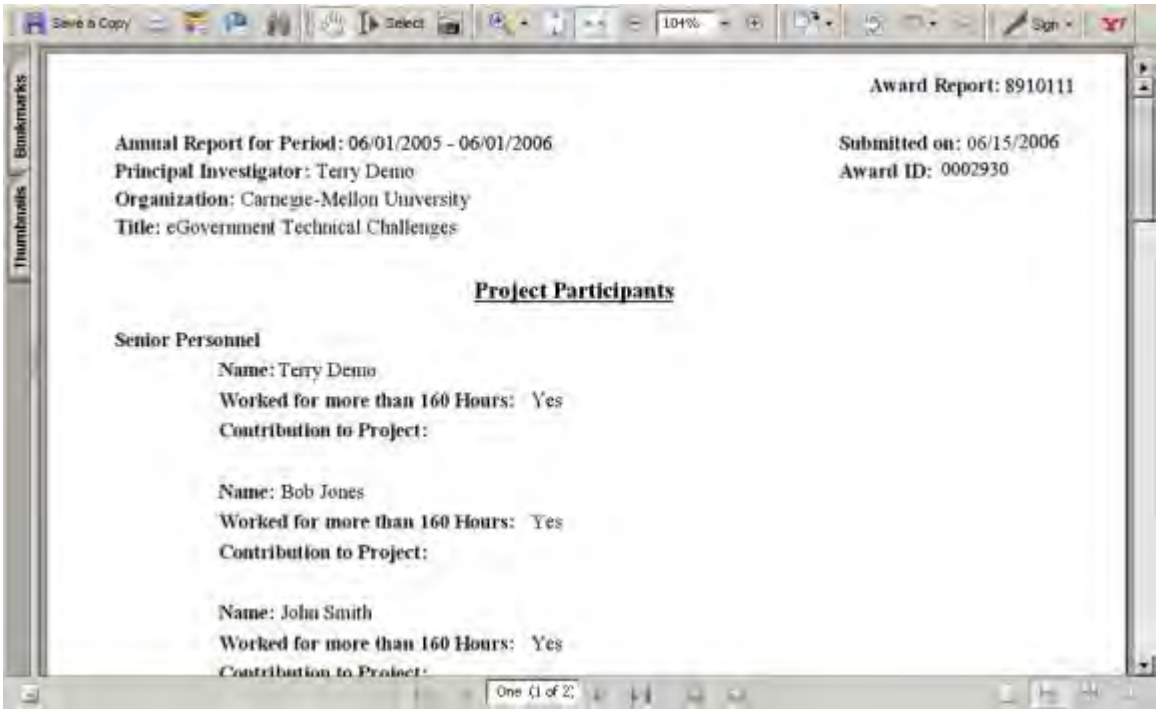


Figure 5 Screen with the selected report in PDF format.

View User Permissions Report

1. Access the **Organizational Reports** screen (Figure 1) (see Access Organizational Reports).

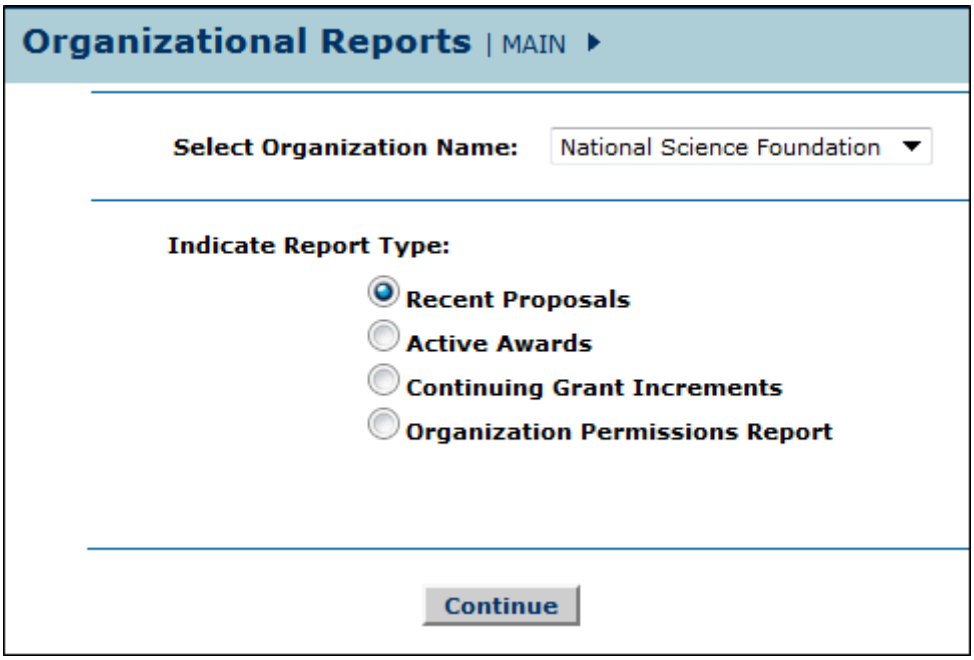


Figure 1 Organizational Reports screen.

2. On the **Organizational Reports** screen (Figure 1), click the radio button for Organization Permissions Report.
3. Click the **Continue** button (Figure 1). The **Organizations Permission Report** screen displays (Figure 2), where you have the following options:
   - View permissions for selected users
   - View users for selected permissions
   - View a full report of all permissions for all users

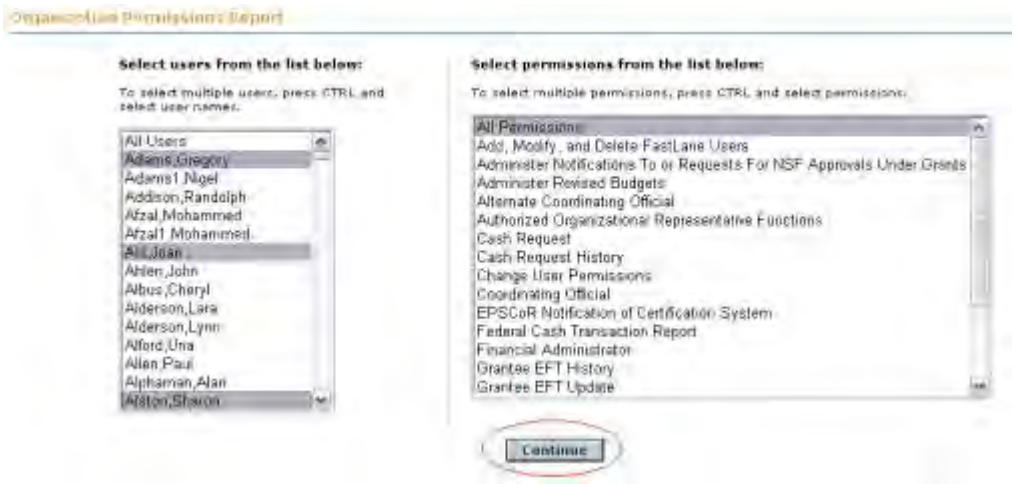


Figure 2 Organization Permissions Report screen. Three user names and All Permissions are highlighted. The Continue button is circled.

View Permissions for Selected Users

1. On the **Organization Permissions Report** screen (Figure 2), from the **Select Users** list (Figure 2), highlight the users whose permissions you want to view or highlight All Users.
2. From the **Select Permissions** list (Figure 2), highlight All Permissions.
3. Click the **Continue** button (Figure 2). The **User Permissions Search Results** screen displays (Figure 3) showing the permissions for each selected user.

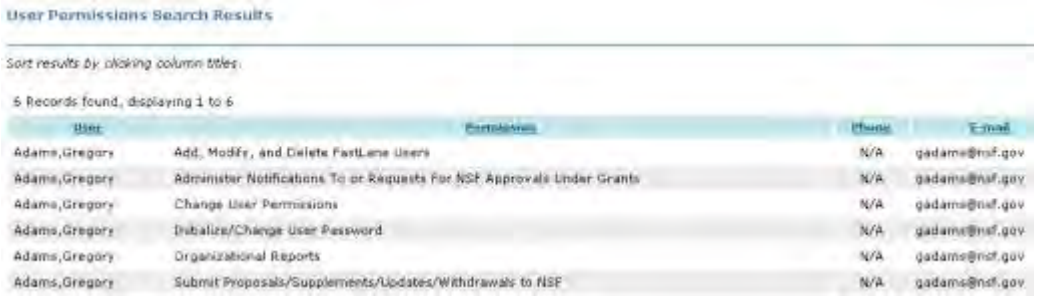


Figure 3 User Permissions Search Results screen with a listing of the permissions for one of the individuals whose names were highlighted. The other individuals whose names were highlighted have no permissions.

View Users for Selected Permissions

1. On the **Organization Permissions Report** screen (Figure 4), from the **Select Permissions** list (Figure 4), highlight the permissions for which you want to see the users.

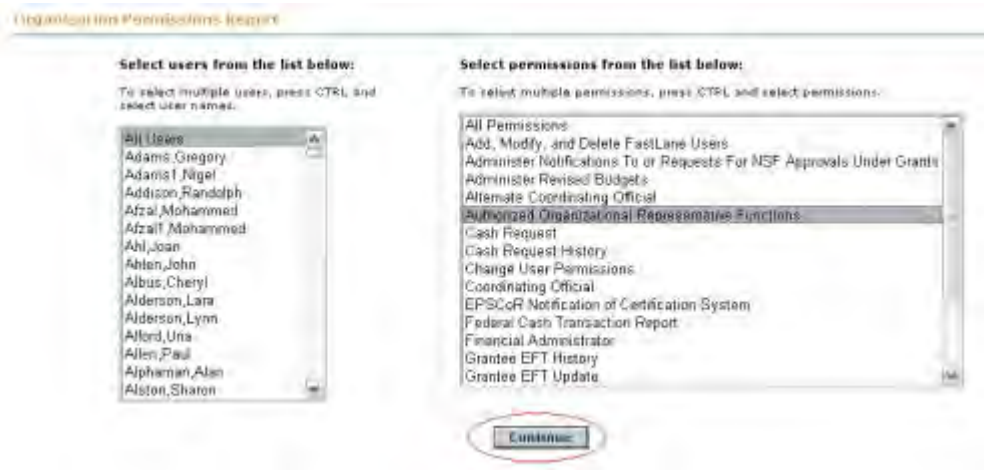


Figure 4 Organization Permissions Report screen. All Users and the Authorized Organizational Representative Functions permission are highlighted. The Continue button is circled.

2. From the **Select Users** list (Figure 4), highlight All Users.
3. Click the **Continue** button (Figure 4). The **User Permissions Search Results** screen displays (Figure 5) showing the users for the highlighted permission.

Figure 5 Organization Permissions Search Results screen listing all users who have the Authorized Organizational Representative Functions permission.

View All Permissions for All Users

1. On the **Organization Permissions Report** screen (Figure 6), from the **Select Permissions** list (Figure 6), highlight All Permissions.

Figure 6 Organization Permissions Report screen. All Users and All Permissions are highlighted. The Continue button is circled.

2. From the **Select Users** list (Figure 6), highlight All Users.
3. Click the **Continue** button (Figure 6). The **User Permissions Search Results** screen displays (Figure 7) showing the permissions for all users, who are listed in alphabetical order.

User Permissions Search Results

Sort results by clicking column titles

1,159 Records found, displaying 1 to 10 [< Previous 10] 1, 2, 3, 4, 5, 6, 7, 8, 9, 10 [Next 10 >]

User	Permission	Phone	E-mail
Adams,Gregory	Add, Modify, and Delete FastLane Users	N/A	gadams@nsf.gov
Adams,Gregory	Administer Notifications To or Requests For NSF Approvals Under Grants	N/A	gadams@nsf.gov
Adams,Gregory	Change User Permissions	N/A	gadams@nsf.gov
Adams,Gregory	Initialize/Change User Password	N/A	gadams@nsf.gov
Adams,Gregory	Organizational Reports	N/A	gadams@nsf.gov
Adams,Gregory	Submit Proposals/Supplements/Updates/Withdrawals to NSF	N/A	gadams@nsf.gov
Adams1,Nigel	Organizational Reports	N/A	nadams@nsf.gov
Afzal,Mohammed	Add, Modify, and Delete FastLane Users	703-428-3422	mafzal@nsf.gov
Afzal,Mohammed	Administer Notifications To or Requests For NSF Approvals Under Grants	703-428-3422	mafzal@nsf.gov
Afzal,Mohammed	Administer Revised Budgets	703-428-3422	mafzal@nsf.gov

Figure 7 User Permissions Search Results screen with a listing of all users in alphabetical order and with the permissions listed for each user.

AOR Functions

Authorized Organizational Representative Functions Introduction

What Is an Authorized Organizational Representative?

Print the contents of the AOR Functions book.

The Authorized Organizational Representative (AOR) is an individual authorized by an organization to do the following:

- Sign a notification,a request, a proposal, or other document at the time of submission to NSF.
- Provide the required certifications for the signed document (the certifications display as part of the signature process).

Electronic signature by an individual with AOR permissions through FastLane is the only way to sign and submit a proposal, notification, or request. You no longer need to send to NSF any signed letters through the post.

See AOR Login for instructions to begin working on AOR functions.

How You Become an AOR

To be an AOR, your organization's Sponsored Project Office representative must add you as a user for FastLane and give you AOR permissions.

If the Institutional Administrator or an SPO with Account Management permissions has given you permissions as an AOR, you can sign and submit proposals, notifications, and requests to NSF.

The AOR's electronic signature is required for the following:

- Submitted Proposal
  - PIs no longer sign proposals
  - As an AOR, your signature must be provided concurrently with submission of the proposal
- Supplemental Funding Request
- Proposal File Update
- A Revised Submitted Budget
- Addition of Subaward Request
- Change PI Request
- PI Transfer

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- Proposal File Update
- A Revised Submitted Budget
- Addition of Subaward Request
- Change PI Request
- PI Transfer

Log In to Authorized Organizational Representative Functions

1. On the **FastLane Home Page** screen (Figure 1), click **Research Administration**. The **Research Administration** screen displays (Figure 2).

Figure 1 FastLane Home Page screen. The Research Administration link is circled.

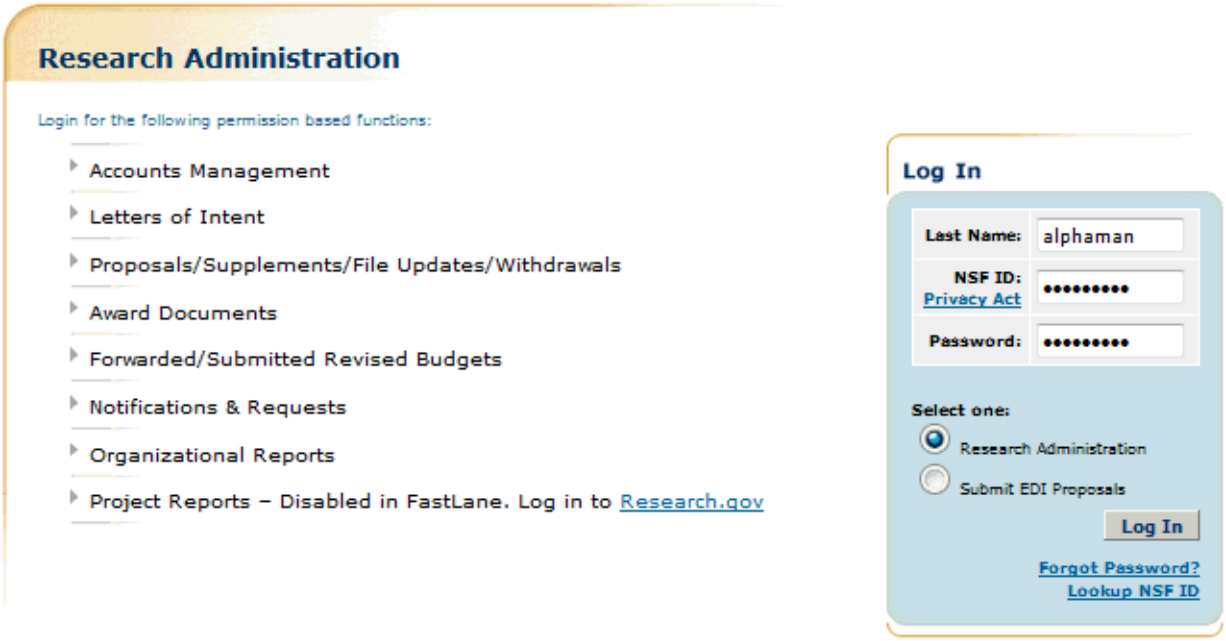

Figure 2 Research Administration screen. The Login section is circled.

2. In the **Login** section, type the following information in the boxes (Figure 2):
   - **Last Name**
   - **NSF ID**
     Your National Science Foundation Identification number
   - **Password**
3. Click the radio button for Research Administration (Figure 2).
4. Click the **Login** button (Figure 2).

Verify Your Signature Information

1. Access the **Authorized Organizational Representative Functions** screen (Figure 1) (see AOR Login).

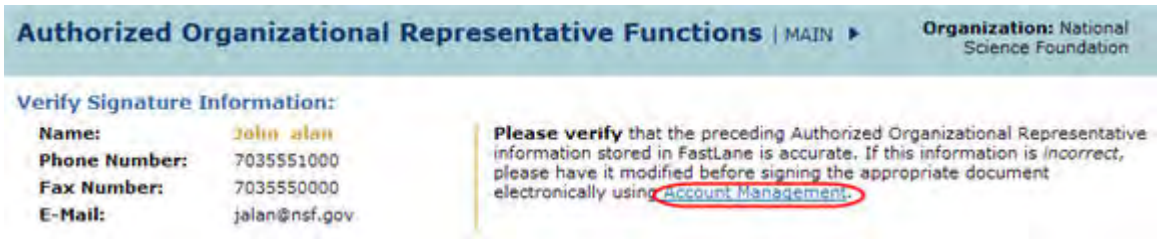

Figure 1 Authorized Organizational Representative Functions screen. The Account Management link is circled.

2. In the **Verify Signature Information** section of the **Authorized Organizational Representative Functions** screen (Figure 1), check the accuracy of the signature information displayed.
3. *If you need to change your signature information*, click **Account Management** (Figure 1). The **Account Management** screen displays on the **User Account** tab (Figure 2).

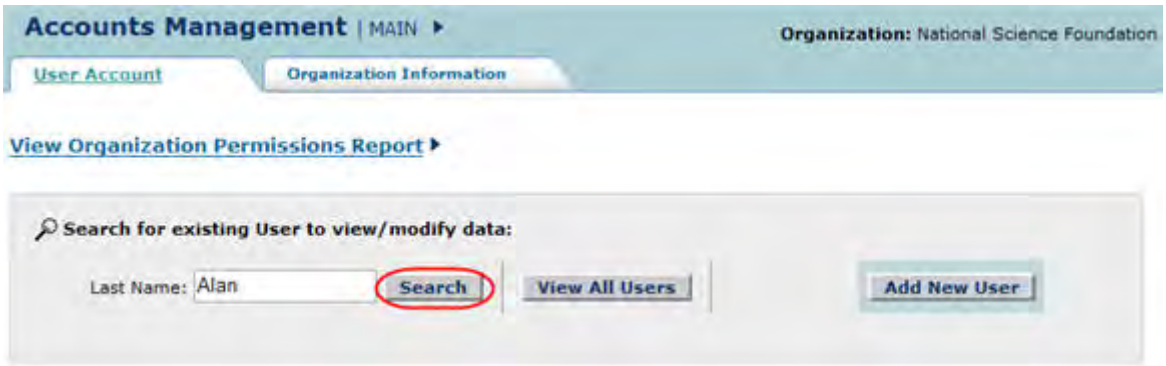

Figure 2 Account Management screen. The Search button is circled.

4. In the **Last Name** box (Figure 2), type your last name.
5. Click the **Search** button (Figure 2). The **Accounts Management** screen displays (Figure 3) with your name listed in the **Search Results** section.

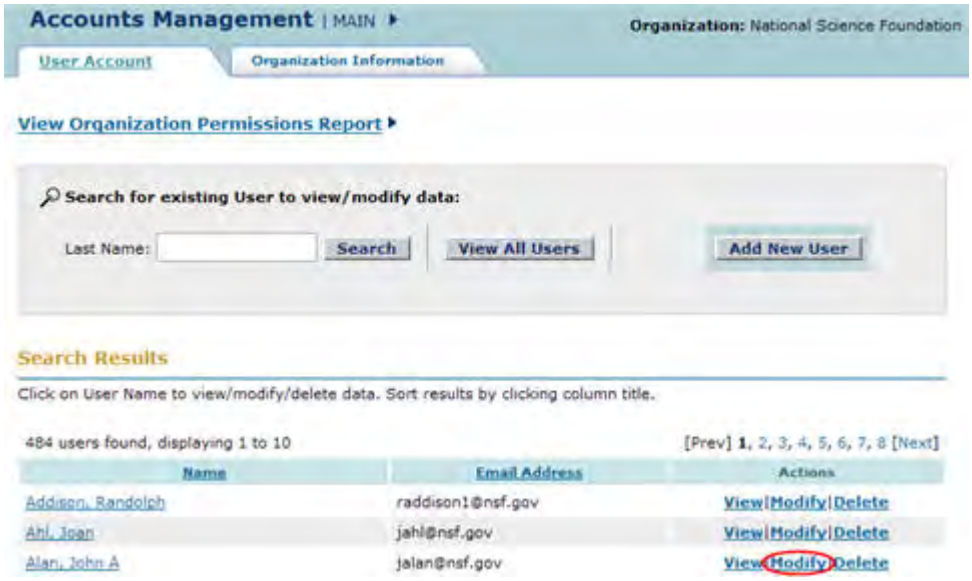

Figure 3 Accounts Management screen. The Modify link is circled.

6. Click **Modify** on the row for your name (Figure 3). The **Modify User Profile** screen displays (Figure 4).

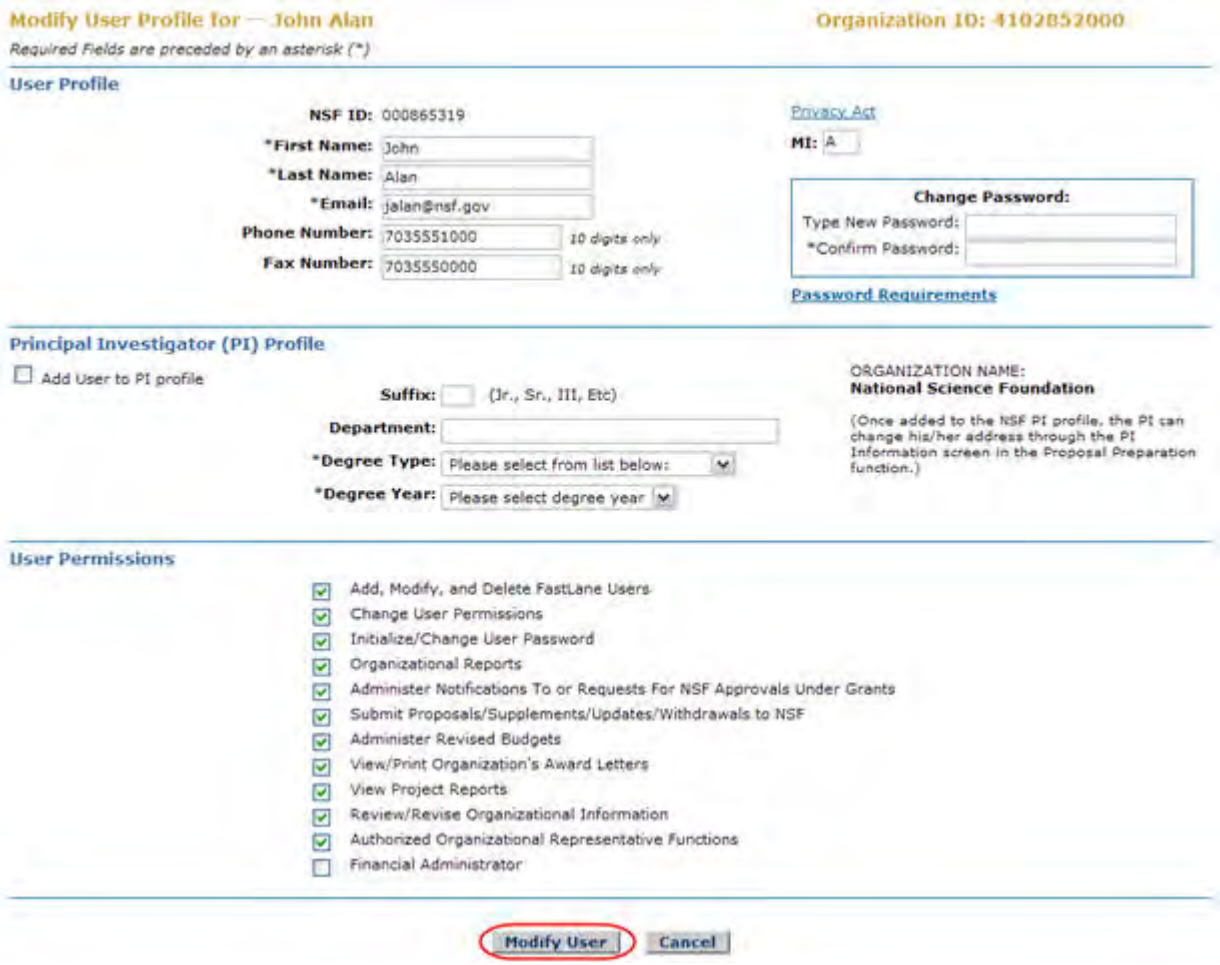

Figure 4 Modify User Profile screen. The Modify User button is circled.

7. In the **User Profile** section (Figure 4), type any changes you need in the following boxes:
   - **First Name**
   - **Last Name**
   - **Email**
   - **Phone Number**
   - **Fax Number**
8. In the **Change Password** box (Figure 4), change your password if needed.
9. *If the User Permission section displays* (as in Figure 4), click the check mark boxes to add or delete any user permissions.

Figure 5 View Modify User Profile screen. The Confirm Changes button is circled.

10. Click the **Modify User** button (Figure 4). The **View Modify User Profile** screen displays (Figure 5).
11. Click the **Confirm Changes** button (Figure 5). The **Confirmation** screen displays (Figure 6).

Figure 6 Confirmation screen. The Account Management Main link is circled.

12. Click **Account Management Main** (Figure 6). The **Account Management** screen displays (Figure 7).

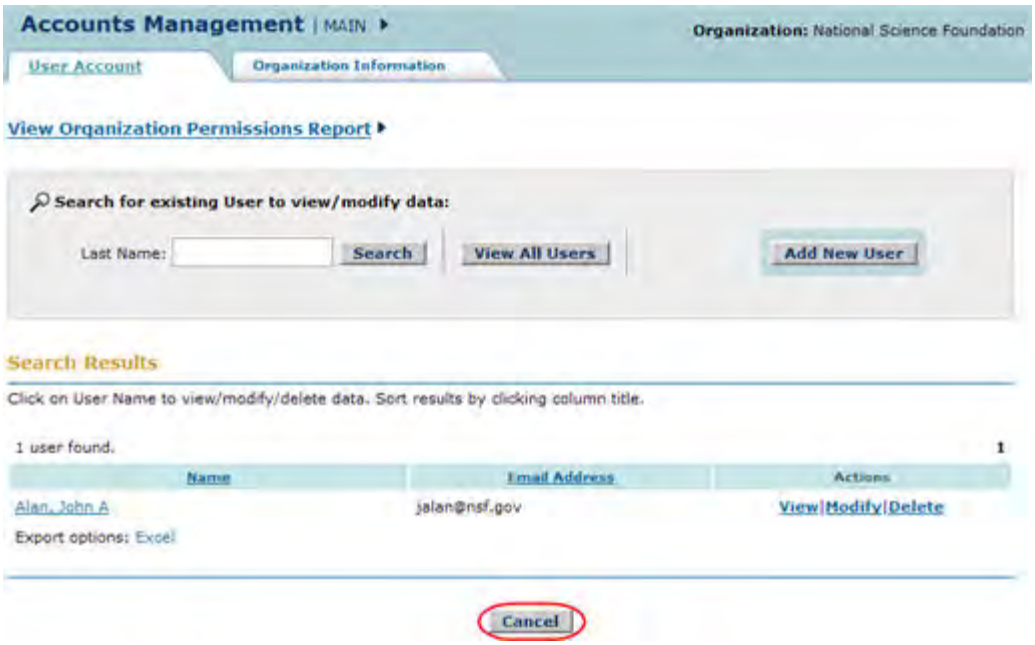

Figure 7 Accounts Management screen. The Cancel button is circled.

13. Click the **Cancel** button (Figure 7). The **Research Administration** screen displays (Figure 8).

Figure 8 Research Administration screen. The Authorized Organizational Representative Functions link is circled.

14. Click **Authorized Organizational Representative Functions** (Figure 8). The **Authorized Organizational Representative Functions screen** displays (Figure 1).

Sign a Single Document or Proposal/Supplement

1. Access the **Authorized Organizational Representative Functions** screen (Figure 1) (see AOR Login).

Figure 1 Authorized Organizational Representative Functions screen. The check mark box for a document and the Sign button are circled.

2. On the **Authorized Organizational Representative Functions** screen (Figure 1), click the check mark box for the document you want to sign.
3. Click the **Sign** button (Figure 1). The **Electronic Signature Notice** screen displays (Figure 2).

Figure 2 Electronic Signature Notice screen. The Debarment and Suspension Certification section and the Sign button are circled.

4. In the **Debarment and Suspension** section (Figure 2), click the radio button for either Yes or No if there are any debarments or suspensions of you or your organization from transactions with federal agencies.
5. *If you answered **Yes***, type an explanation in the text box under the radio buttons (Figure 2).
6. Click the **Sign** button (Figure 2). The **Confirmation** screen displays (Figure 3) with the message that the document has been signed.

Figure 3 Confirmation screen. The Return to AOR Functions Main link is circled.

7. Click **Return to AOR Functions Main**. The **Authorized Organizational Representative Functions** screen displays (Figure 1).

Sign All Proposals / Supplements

1. Access the **Authorized Organizational Representative Functions** screen (Figure 1) (see AOR Login).

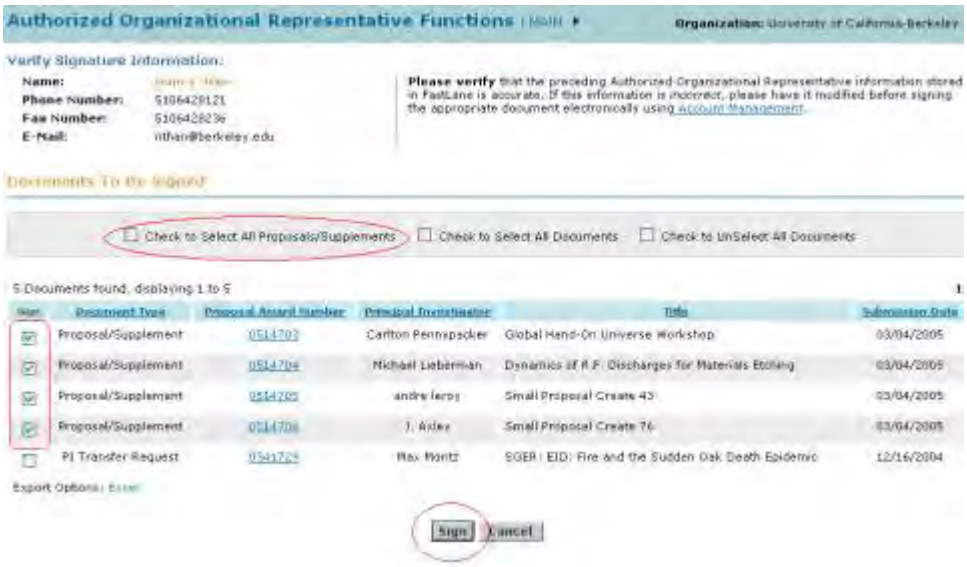

Figure 1 Authorized Organizational Representative Functions screen. The check mark box for Check to Select all Proposals / Supplements and the Sign button are circled. The check marks for all the proposals / supplements are also circled.

2. On the **Authorized Organizational Representative Functions** screen (Figure 1), in the **Documents To Be Signed** section, click the check mark box for Check to Select Proposals/Supplements. Check marks display in the boxes next to all the proposals/supplements (see Figure 1).
3. Click the **Sign** button (Figure 1). The **Electronic Signature Notice** screen displays (Figures 2) with a listing of all the proposals/supplements you are signing.

Figure 2 Electronic Signature Notice screen. The Debarment and Suspension Certification section and the Sign button are circled.

4. In the **Debarment and Suspension** section (Figure 2), click the radio button for either Yes or No if there are any debarments or suspensions of you or your organization from transactions with federal agencies.
5. *If you answered **Yes**,* type an explanation in the text box under the radio buttons (Figure 2).
6. Click the **Sign** button (Figure 2). The **Confirmation** screen displays (Figure 3) with a message that the proposal/supplements have been signed.

Figure 3 Confirmation screen. The Return to AOR Functions Main link is circled.

7. Click **Return to AOR Functions Main** (Figure 3). The **Authorized Organizational Representative Functions** screen displays (Figure 1).

Sign All Documents

1. Access the **Authorized Organizational Representative Functions** screen (Figure 1) (see AOR Login).

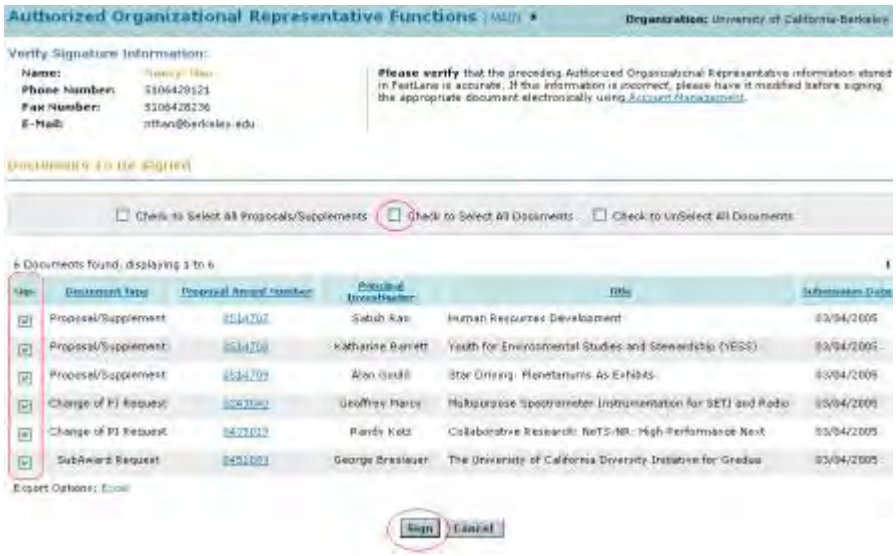

Figure 1 Authorized Organizational Representative Functions screen. The check mark box for Check to Select all Documents and the Sign button are circled. The check marks for all the documents are also circled.

2. On the **Authorized Organizational Representative Functions** screen (Figure 1), in the **Documents To Be Signed** section, click the check mark box for Check to Select All Documents. Check marks display in the boxes next to all the documents (see Figure 1).
3. Click the **Sign** button (Figure 1). The **Electronic Signature Notice** screen displays (Figures 2) with a listing of all the documents you are signing.

Drug Free Work Place Certification

By electronically signing the Certification Pages, the Authorized Organizational Representative (or equivalent), is providing the Drug Free Work Place Certification contained in Exhibit II-3 of the Grant Proposal Guide.

Debarment and Suspension Certification

Is the organization or its principals presently debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from covered transactions by any Federal department or agency?

- (•) No
- ( ) Yes (If "yes" please provide an explanation below.)

By electronically signing the Certification Pages, the Authorized Organizational Representative (or equivalent) or Individual Applicant is providing the Debarment and Suspension Certification contained in Exhibit II-4 of the Grant Proposal Guide.

Certification Regarding Lobbying

This certification is required for an award of a Federal contract, grant, or cooperative agreement exceeding $100,000 and for an award of a Federal loan or a commitment providing for the United States to insure or guarantee a loan exceeding $150,000.

Figure 2 Electronic Signature Notice screen. The Debarment and Suspension section and the Sign button are circled.

4. In the **Debarment and Suspension** section (Figure 2), click the radio button for either Yes or No if there are any debarments or suspensions of you or your organization from transactions with federal agencies.
5. *If you answered* ***Yes***, type an explanation in the text box under the radio buttons (Figure 2).
6. Click the **Sign** button (Figure 2). The **Confirmation** screen displays (Figure 3) with a message that the documents have been signed.

CONFIRMATION
The Following Documents Have Been Signed:

Document Type	Proposal Award Number	Title
Proposal/Supplement	0514707	Human Resources Development
Proposal/Supplement	0514708	Youth for Environmental Studies and Stewardship (YESS)
Proposal/Supplement	0514709	Star Driving: Planetariums As Exhibits
Change of PI Request	0243040	Multipurpose Spectrometer Instrumentation for SETI and Radio
Change of PI Request	0435019	Collaborative Research: NeTS-NR: High-Performance Next
SubAward Request	0451089	The University of California Diversity Initiative for Gradua

Return to AOR Functions Main

Figure 3 Confirmation screen. The Return to AOR Functions Main link is circled.

7. Click **Return to AOR Functions Main** (Figure 3). The **Authorized Organizational Representative Functions** screen displays (Figure 1).

View a Document

1. Access the **Authorized Organizational Representative Functions** screen (Figure 1) (see AOR Login).

Figure 1 Authorized Organizational Representative Functions screen. The proposal/award number for a document is circled.

2. In the **Documents To Be Signed** section of the **Authorized Organizational Representative Functions** screen (Figure 1), click the proposal/award number on the row for the document you want to view.

If the document is a proposal, the **View Submitted Proposal** screen displays (Figure 2).

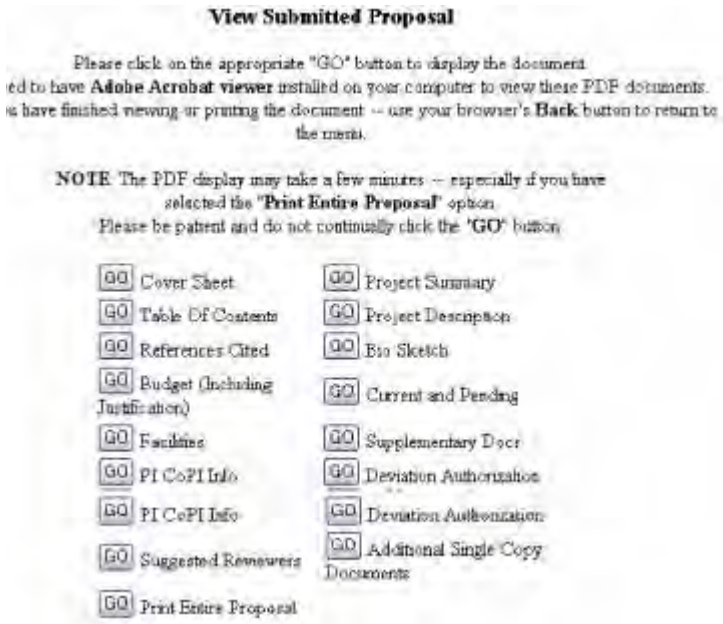

Figure 2 View Submitted Proposal screen.

If the document is a Supplemental Funding Request, the **View Proposal** screen displays (Figure 3).

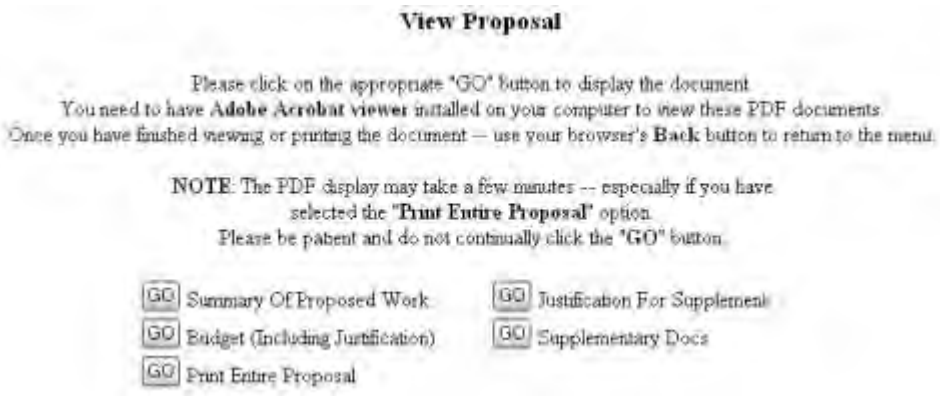

Figure 3 View Proposal screen.

If the document is a Revised Proposal Budget, the **Summary Proposal Budget** screen displays (Figure 4) in PDF format. If you need Adobe Reader, see [Adobe Reader for FastLane](#).

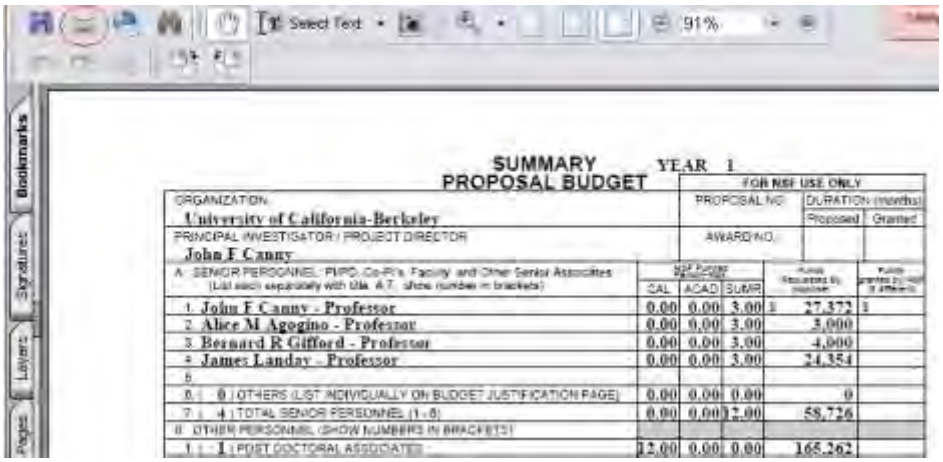

Figure 4 Summary Proposal Budget screen (in PDF format).

If the document is a subaward, the **View Print Subaward** screen displays (Figure 5).

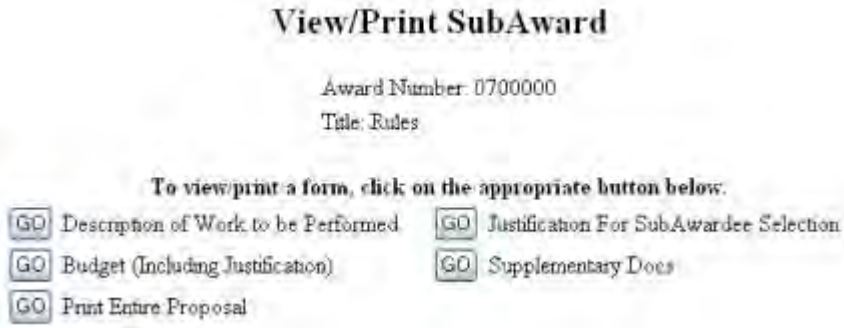

Figure 5 View / Print Subaward screen.

Panelist Functions

Panelist Functions Introduction

NSF invites subject matter experts to participate in reviewing proposals submitted for government funding. Upon accepting the invitation, reviewers use the Panelist Functions to enter and submit reviews on assigned proposals.

The Panelist Functions include the following four systems:

- Travel and Reimbursement System
- Meeting Sign-In
- Panel Review System
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Log In to Panelist Functions

1. On the **FastLane Home Page** screen (Figure 1), select **Panelist Functions** in the navigation bar at the top. The **Panelist Functions** screen displays (Figure 2).

Figure 1 FastLane Home Page screen. The link for Panelist Functions is circled.

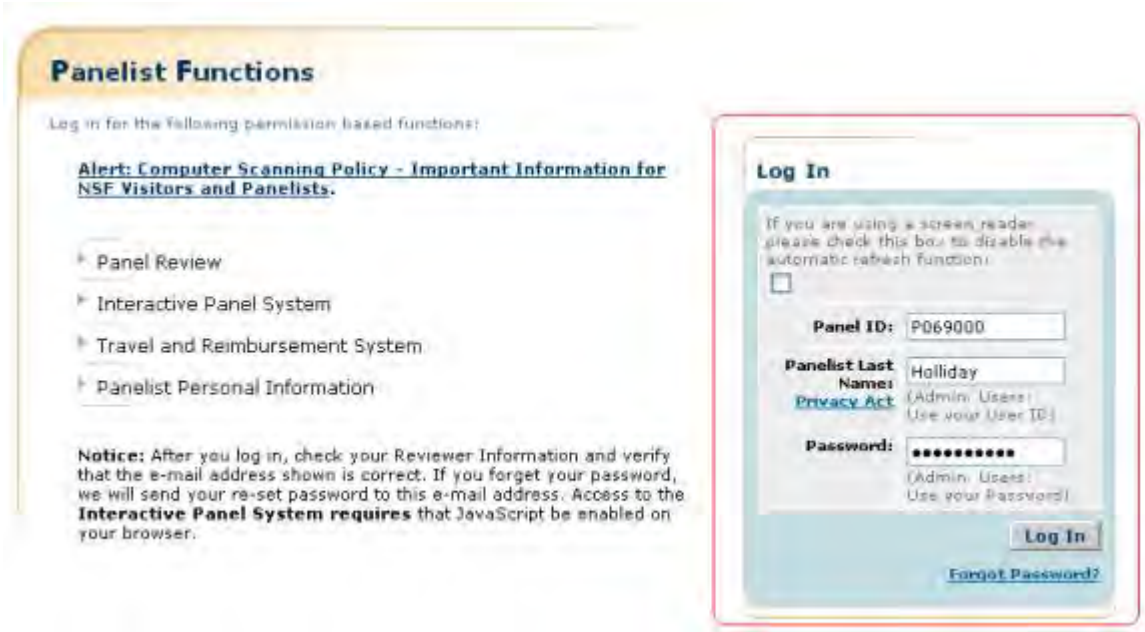
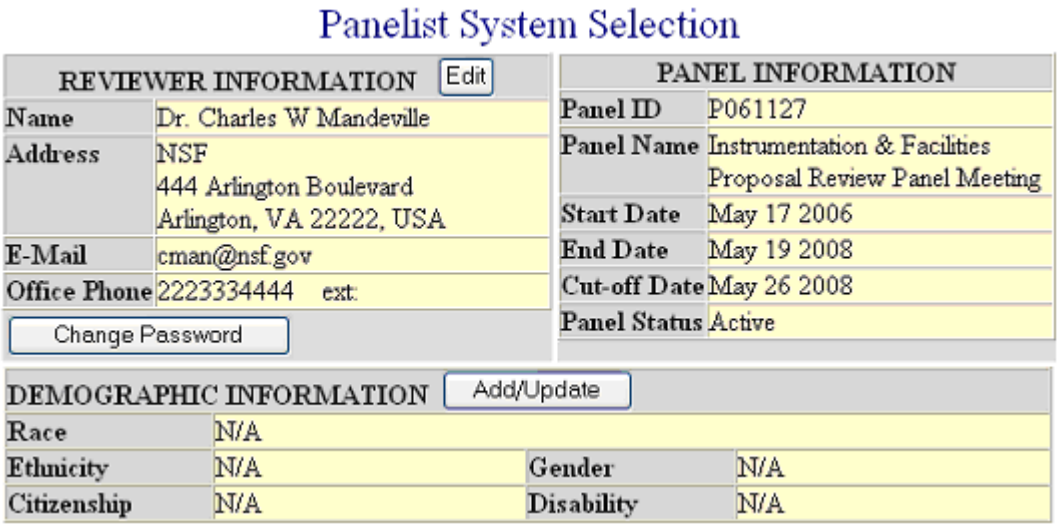


Figure 2 Panelist Functions screen. The Log In section is circled.

2. In the **Log In** section on the **Panelist Functions** screen (Figure 2), do the following:
    - In the **Panel ID** box, type the Panel ID that you received from NSF.
    - In the **Panelist Last Name** box, type your last name.
    - In the **Password** box, type the password that you received from NSF.
3. Select the **Login** button (Figure 2). The **Panelist System Selection** screen displays (Figure 3 through 8), where you have the option to work on any of these systems:
    - Travel and Reimbursement System
    - Meeting Sign-In
    - Panel Review System
    - Interactive Panel System



Panelist System Selection

REVIEWER INFORMATION	Edit
Name	Dr. Charles W Mandeville
Address	NSF 444 Arlington Boulevard Arlington, VA 22222, USA
E-Mail	cman@nsf.gov
Office Phone	2223334444 ext:
Change Password	

PANEL INFORMATION	
Panel ID	P061127
Panel Name	Instrumentation & Facilities Proposal Review Panel Meeting
Start Date	May 17 2006
End Date	May 19 2008
Cut-off Date	May 26 2008
Panel Status	Active

DEMOGRAPHIC INFORMATION	Add/Update		
Race	N/A		
Ethnicity	N/A	Gender	N/A
Citizenship	N/A	Disability	N/A

Figure 3 Panelist System Selection screen, Reviewer and Proposal Information section (upper portion of the screen).

Proposal Evaluation Criteria

Please provide detailed comments on the quality of this proposal with respect to **each** of the two NSF Merit Review Criteria identified below, noting specifically the proposal's strengths and weaknesses. As guidance, a list of potential considerations that you might employ in your evaluation follows each criterion. These considerations are suggestions and **not all will apply to any given proposal**. While you are expected to **separately address** each NSF Merit Review Criterion, you are requested to address only those considerations that are relevant to this proposal and for which you are qualified to make judgements.

In addition, please provide an overall rating and **summary statement** that includes comments on the relative importance of the two criteria in assigning your rating. **Please note** that the criteria need not be weighted equally.

What is the intellectual merit of the proposed activity?

How important is the proposed activity to advancing knowledge and understanding within its own field or across different fields? How well qualified is the proposer (individual or team) to conduct the project? (If appropriate, the reviewer will comment on the quality of prior work.) To what extent does the proposed activity suggest and explore creative, original, or potentially transformative concepts? How well conceived and organized is the proposed activity? Is there sufficient access to resources?

What are the broader impacts of the proposed activity?

Potential considerations: How well does the activity advance discovery and understanding while promoting teaching, training, and learning? How well does the proposed activity broaden the participation of underrepresented groups (e.g., gender, ethnicity, disability, geography, etc.)? To what extent will it enhance the infrastructure for research and education, such as facilities, instrumentation, networks, and partnerships? Will the results be disseminated broadly to enhance scientific and technological understanding? What may be the benefits of the proposed activity to society?

Figure 4 Proposal Evaluation Criteria section of the Panelist System Selection screen.

Your Potential Conflicts Of Interest

For panel reviewers:

If you have an affiliation or financial connection with the organization or person submitting the proposal that might be construed as creating a conflict of interest, describe those affiliations or interests in the Conflict of Interest section under "Prepare Review", and contact the cognizant NSF Program Officer before completing the review.

An NSF Program Officer will examine any statement of affiliations or interests for the existence of a conflict of interest. If you do not include a statement of potential conflicts of interest, NSF assumes that you have no conflicting affiliations or interests.

In addition, you must complete the Conflict-of-Interest and Confidentiality Statement for NSF Panelists (NSF Form 1230P dated 11/2011).

For ad hoc reviewers:

If you have an affiliation or financial connection with the organization or person submitting the proposal that might be construed as creating a conflict of interest, describe those affiliations or interests in the Conflict of Interest section under "Prepare Review", and contact the cognizant NSF Program Officer before completing the review.

An NSF Program Officer will examine any statement of affiliations or interests for the existence of a conflict of interest. If you do not include a statement of potential conflicts of interest, NSF assumes that you have no conflicting affiliations or interests.

Figure 5 Your Potential Conflicts of Interest section of the Panelist System Selection screen.

Your Obligation To Keep Proposals Confidential

The Foundation receives proposals in confidence and protects the confidentiality of their contents. For this reason, you must not copy, quote from, or otherwise use or disclose to anyone, including your graduate students or post-doctoral or research associates, any material from any proposal you are asked to review. Unauthorized disclosure of confidential information could subject you to administrative sanctions. If you believe a colleague can make a substantial contribution to the review, please obtain permission from the NSF Program officer *before* disclosing either the contents of the proposal or the name of any applicant or principal investigator. When you have completed your review, please be certain to destroy the proposal.

Figure 6 Your Obligation to Keep Proposals Confidential section of the Panelist System Selection screen.

NSF 11-1 January 2011

Privacy Act and Public Burden Statements

The information requested on proposal forms and project reports is solicited under the authority of the National Science Foundation Act of 1950, as amended. The information on proposal forms will be used in connection with the selection of qualified proposals; and project reports submitted by awardees will be used for program evaluation and reporting within the Executive Branch and to Congress. The information requested may be disclosed to qualified reviewers and staff assistants as part of the proposal review process; to proposer institutions/grantees to provide or obtain data regarding the proposal review process, award decisions, or the administration of awards; to government contractors, experts, volunteers and researchers and educators as necessary to complete assigned work; to other government agencies or other entities needing information regarding Proposers or nominees as part of a joint application review process, or in order to coordinate programs or policy; and to another Federal agency, court, or party in a court or Federal administrative proceeding if the government is a party. Information about Principal Investigators may be added to the Reviewer file and used to select potential candidates to serve as peer reviewers or advisory committee members. See Systems of Records, NSF-50, "Principal Investigator/Proposal File and Associated Records," 69 Federal Register 26410 (May 12, 2004), and NSF-51, "Reviewer/Proposal File and Associated Records," 69 Federal Register 26410 (May 12, 2004). Submission of the information is voluntary. Failure to provide full and complete information, however, may reduce the possibility of receiving an award.

An agency may not conduct or sponsor, and a person is not required to respond to, an information collection unless it displays a valid OMB control number. The OMB control number for this collection is 3145-0058. Public reporting burden for this collection of information is estimated to average 120 hours per response, including the time for reviewing instructions. Send comments regarding the burden estimate and any other aspect of this collection of information, including suggestions for reducing this burden, to:

Suzanne H. Plimpton

Reports Clearance Officer

Division of Administrative Services

National Science Foundation

Arlington, VA 22230

Figure 7 Privacy Act and Public Burden Statements section of the Panelist System Selection screen.

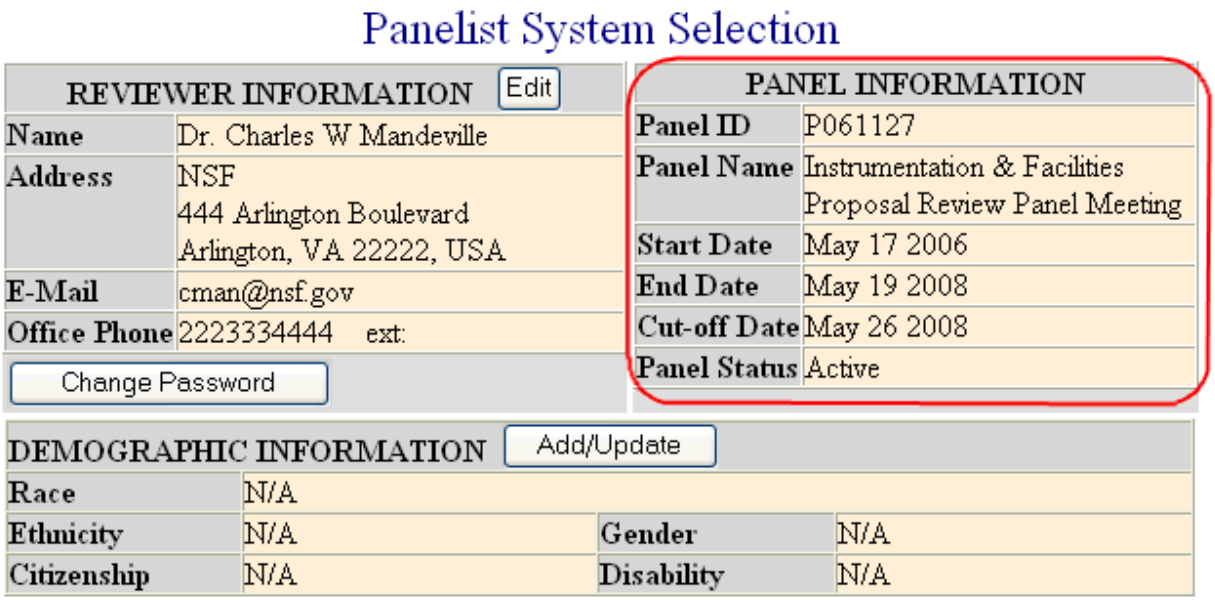
Click to work on:
Travel and Reimbursement
Meeting Sign-in
Panel Review System
Interactive Panel System

Figure 8 Panelist Functions section of the Panelist System Selection screen.

Locate Your Panel Assignment Information

Your panel assignment information will be sent via email from your Program Officer (PO). However,
you can reference the information (i.e., **Panel/Meeting ID**, **Panel Name**, **Start Date**, **End Date**, **Cut-off Date**, and **Panel Status Active**) online by doing the following:

1. Access FastLane by pointing your browser to www.fastlane.nsf.gov
2. Click **Panelist Functions**. The **Panelist Functions** screen displays.
3. Log in to the Panelist Functions. The **Panelist System Selection** screen displays (Figure 1).
4. Locate the **Panel Information** section of the **Panelist System Selection** screen (Figure 1).



Panelist System Selection

REVIEWER INFORMATION	Edit
Name	Dr. Charles W Mandeville
Address	NSF 444 Arlington Boulevard Arlington, VA 22222, USA
E-Mail	cman@nsf.gov
Office Phone	2223334444 ext:
Change Password	

PANEL INFORMATION	
Panel ID	P061127
Panel Name	Instrumentation & Facilities Proposal Review Panel Meeting
Start Date	May 17 2006
End Date	May 19 2008
Cut-off Date	May 26 2008
Panel Status	Active

DEMOGRAPHIC INFORMATION	Add/Update		
Race	N/A		
Ethnicity	N/A	Gender	N/A
Citizenship	N/A	Disability	N/A

Figure 1 Upper portion of the Panelist System Selection screen showing Panel Information.

Changing Your Password

1. Select the **Change Password** link from the upper-right navigation bar.

Figure 9: Change Password Link

2. The Rules of Behavior page will be displayed. This page is used to ensure that you understand the rules of behavior involved with interacting with a government computer system. You are required to read and accept the rules of behavior before continuing through to change your password. Click the **"I have read and accept the Rules of Behavior"** checkbox, and click the **Accept** button (pictured below).

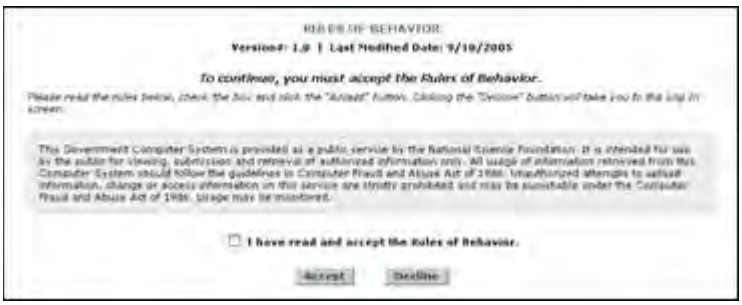


Figure 10: Rules of Behavior Screen

The Change Password screen is displayed.

3. Enter your Old/Temporary Password, your New Password, and Confirm your New Password.

NOTE: Password length must be between 6 and 20 characters. The password must contain at least one alphabetic and one numeric character. Passwords are not case sensitive. You cannot reuse the last three passwords you have used. Passwords expire every 365 days.

Figure 11: Change Password Screen

4. Click the **Submit** button.

A confirmation screen is displayed indicating you have successfully changed your password. You may select the **Applicant Home Page** link to return to your Application task list.
Password length must be between 6 and 20 characters. The password must contain at least one alphabetic and one numeric character. Passwords are not case sensitive. You cannot reuse the last three passwords you have used. Passwords expire every 365 days.

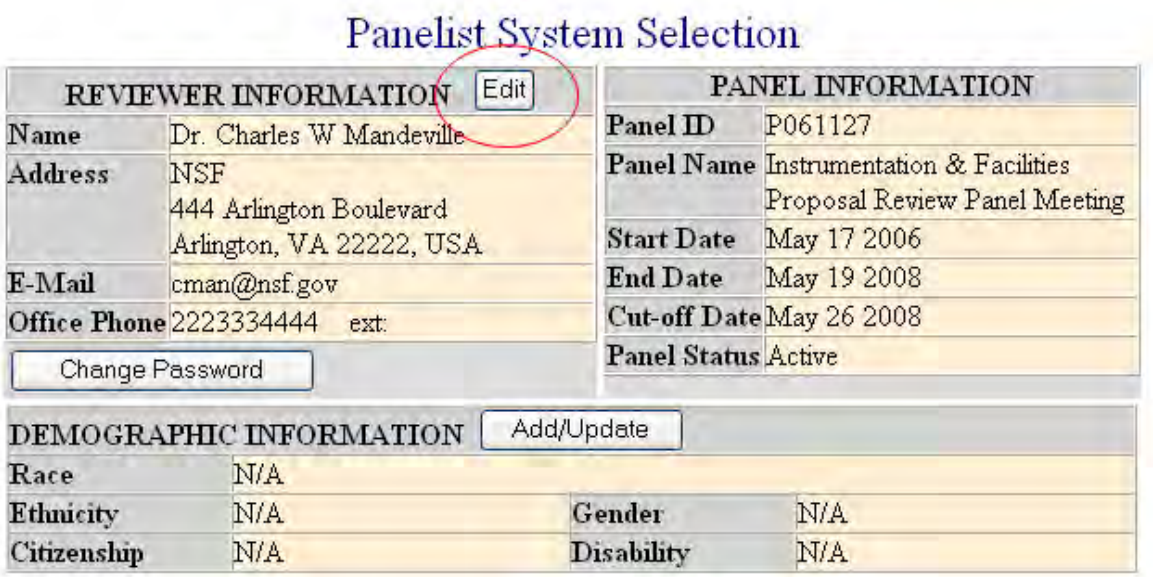
Update Your Personal Information

After accepting to be a part of your first meeting, the following personal information that you provided to the National Science Foundation (NSF) is stored in FastLane:

- Title
- Last Name
- First Name
- Institution Address
- Institution Phone No.
- Institution FAX No.
- Email Address
- Website Address

Once you have logged into the FastLane Panelist Functions system, you can update any of the above information by doing the following:

1. Access FastLane by pointing your browser to www.fastlane.nsf.gov
2. Click **Panelist Functions**. The **Panelist Functions** screen displays.
3. Log in to Panelist Functions with the initial log-on information provided by NSF. The **Panelist System Selection** screen displays.
4. Locate the **Reviewer Information** section (Figure 1).



Panelist System Selection

REVIEWER INFORMATION	Edit
Name	Dr. Charles W Mandeville
Address	NSF 444 Arlington Boulevard Arlington, VA 22222, USA
E-Mail	cman@nsf.gov
Office Phone	2223334444 ext:
Change Password	

PANEL INFORMATION	
Panel ID	P061127
Panel Name	Instrumentation & Facilities Proposal Review Panel Meeting
Start Date	May 17 2006
End Date	May 19 2008
Cut-off Date	May 26 2008
Panel Status	Active

DEMOGRAPHIC INFORMATION	Add/Update		
Race	N/A		
Ethnicity	N/A	Gender	N/A
Citizenship	N/A	Disability	N/A

Figure 1 Reviewer and Demographic Information sections of the Panelist System Selection screen. The Edit button is circled.

5. Click the **Edit** button (Figure 1). The **Reviewer's Information** screen displays.
6. Change any of the information on the **Reviewer's Information** screen.
7. Click the **Save** button to change your information. Or, click the **Return to the Panelist System Selection** button to leave your information as is.

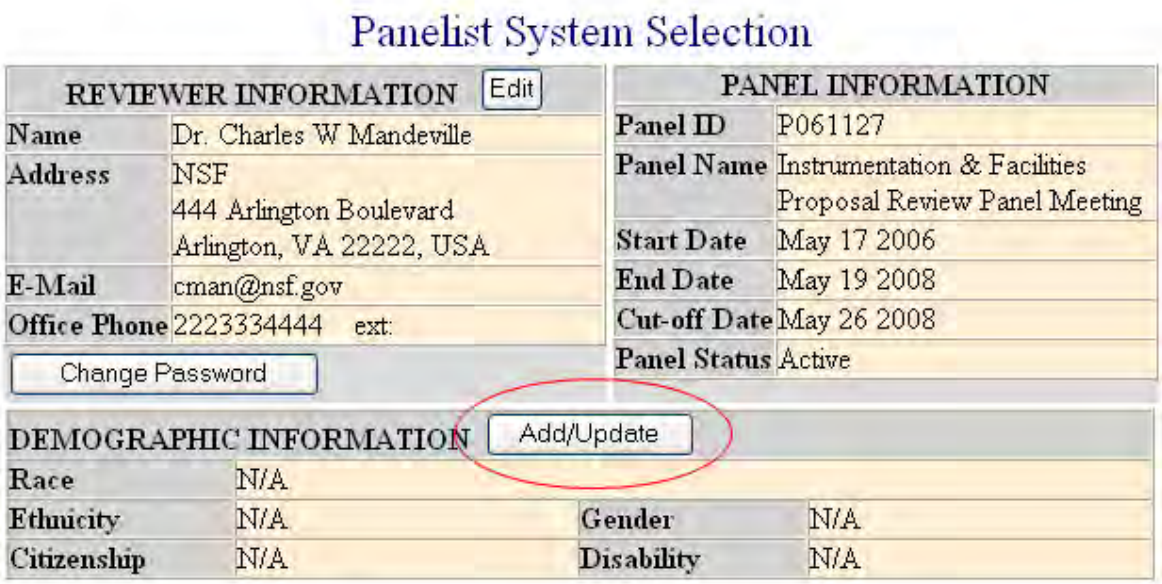
Update Your Demographic Information

After accepting to be a part of your first panel, the following demographic information that you provided to the National Science Foundation (NSF) is stored in FastLane:

- Race
- Ethnicity
- Citizenship
- Gender
- Disability

Once you have logged into the FastLane Panelist Functions system, you can update any of the information by doing the following:

1. Access FastLane by pointing your browser to www.fastlane.nsf.gov
2. Click **Panelist Functions**. The **Panelist Functions** screen displays.
3. Log in to the Panelist Functions with the initial log on information provided by NSF. The **Panelist System Selection** screen displays.
4. Locate the **Demographic Information** section (Figure 1).



Panelist System Selection

REVIEWER INFORMATION	Edit
Name	Dr. Charles W Mandeville
Address	NSF 444 Arlington Boulevard Arlington, VA 22222, USA
E-Mail	cman@nsf.gov
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DEMOGRAPHIC INFORMATION	Add/Update		
Race	N/A		
Ethnicity	N/A	Gender	N/A
Citizenship	N/A	Disability	N/A

Figure 1 Reviewer and Demographic Information section of the Panelist System Selection screen. The Add/Update button is circled.

5. Click the **Add/Update** button (Figure 1). The **Please add/update your Demographic Information** screen displays.
6. Change any of the information.
7. Click the **Save** button to change your information. Or, click the **Go Back** button to leave your information as is.

Travel and Reimbursement

Travel and Reimbursement System Introduction

Print the contents of the Travel and Reimbursement System book.

As a participant attending a panel meeting at NSF, arrange for both travel and lodging through the FastLane Travel and Reimbursement System.

The United States Federal Government requires that all NSF business travel arrangements be coordinated through NSF's travel management contractors. Do this through the FastLane Travel and Reimbursement System (see Access the FastLane Travel and Reimbursement System).

For each meeting, you *must* complete the following three steps:

1. Answer the registration questions. The answers to these questions help determine the meeting travel and day rates and also determine which functions of the Travel and Reimbursement System will be open to you for that meeting.
2. Confirm your Social Security Number (*only if you answered* Yes *to the registration question, "Do you have a U.S. Social Security Number?").*
3. Submit your personal and banking information.

Once you have completed these steps, you can do the following, depending upon how you answered the registration questions for that meeting:

- Make travel arrangements
- Submit expenses

Travel and Reimbursement System Introduction

Print the contents of the Travel and Reimbursement System book.

As a participant attending a panel meeting at NSF, arrange for both travel and lodging through the FastLane Travel and Reimbursement System.

The United States Federal Government requires that all NSF business travel arrangements be coordinated through NSF's travel management contractors. Do this through the FastLane Travel and Reimbursement System (see Access the FastLane Travel and Reimbursement System).

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1. Answer the registration questions. The answers to these questions help determine the meeting travel and day rates and also determine which functions of the Travel and Reimbursement System will be open to you for that meeting.
2. Confirm your Social Security Number (*only if you answered* Yes *to the registration question, "Do you have a U.S. Social Security Number?").*
3. Submit your personal and banking information.

Once you have completed these steps, you can do the following, depending upon how you answered the registration questions for that meeting:

- Make travel arrangements
- Submit expenses

Access the Travel and Reimbursement System

1. On the **FastLane Home Page** screen (Figure 1), select **Panelist Functions** in the navigation bar at the top. The **Panelist Functions** screen displays (Figure 2).

Figure 1 FastLane Home Page screen. The link for Panelist Functions is circled.

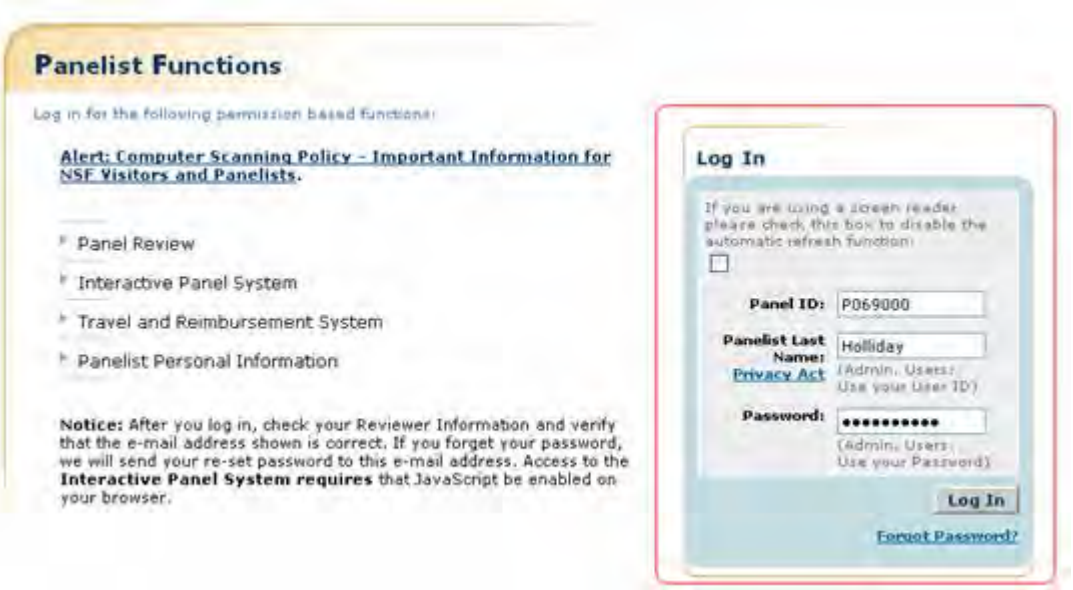

Figure 2 Panelist Functions screen. The Log In section is surrounded in red.

2. In the **Log In** section on the **Panelist Functions** screen (Figure 2), do the following:
   - In the **Panel ID** box, type the Panel/Meeting ID that you received from NSF.
   - In the **Panelist Last Name** box, type your last name.
   - In the **Password** box, type the password that you received from NSF.
3. Select the **Login** button (Figure 2). The **Panelist System Selection** screen displays (Figure 3).

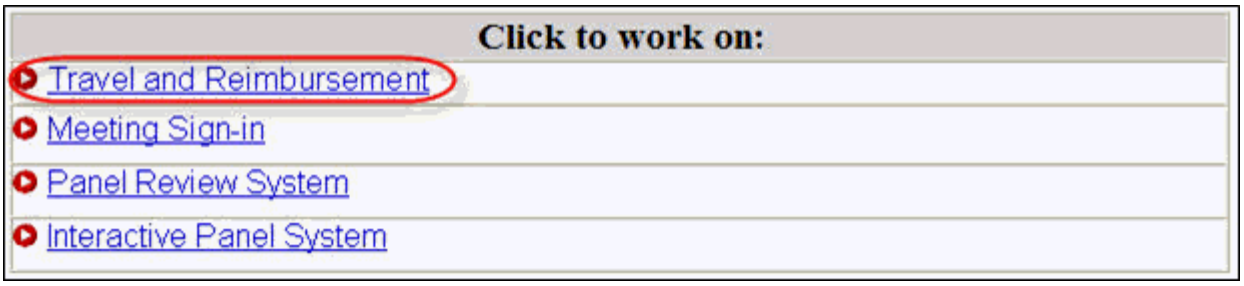

Figure 3 Travel and Reimbursement link at the bottom of the Panelist System Selection screen.

4. Select **Travel and Reimbursement** (Figure 3). The **Travel and Reimbursement Main** screen displays (Figure 4). If this is the first time you have accessed the system for the meeting you plan to attend, you must register and therefore have access only to Participant Registration Questions, as in Figure 4. See Answer Participant Registration Questions.

Figure 4 Travel and Reimbursement screen with only Step 1 Participant Registration Questions accessible.

Register for a Meeting

Register for a Meeting Introduction

Before making travel and lodging arrangements, you must register as a participant for your meeting. The steps are as follows:

- Answer the participant registration questions.
- Confirm your Social Security Number (if you answered Yes to Question 1).
- Submit your personal contact and banking information.

(Click on a link for instructions for that action.)

Register for a Meeting Introduction

Before making travel and lodging arrangements, you must register as a participant for your meeting. The steps are as follows:

- Answer the participant registration questions.
- Confirm your Social Security Number (if you answered Yes to Question 1).
- Submit your personal contact and banking information.

(Click on a link for instructions for that action.)

Answer Participant Registration Questions

1. Access the **Travel and Reimbursement Main** screen (Figure 1) (see Access the Travel and Reimbursement System).

Figure 1 Travel and Reimbursement screen. Step 1 Participant Registration Questions is circled.

2. Select **Step 1 Participant Registration Questions** (Figure 1). The **Participant Registration Questions** screen displays (Figure 2).

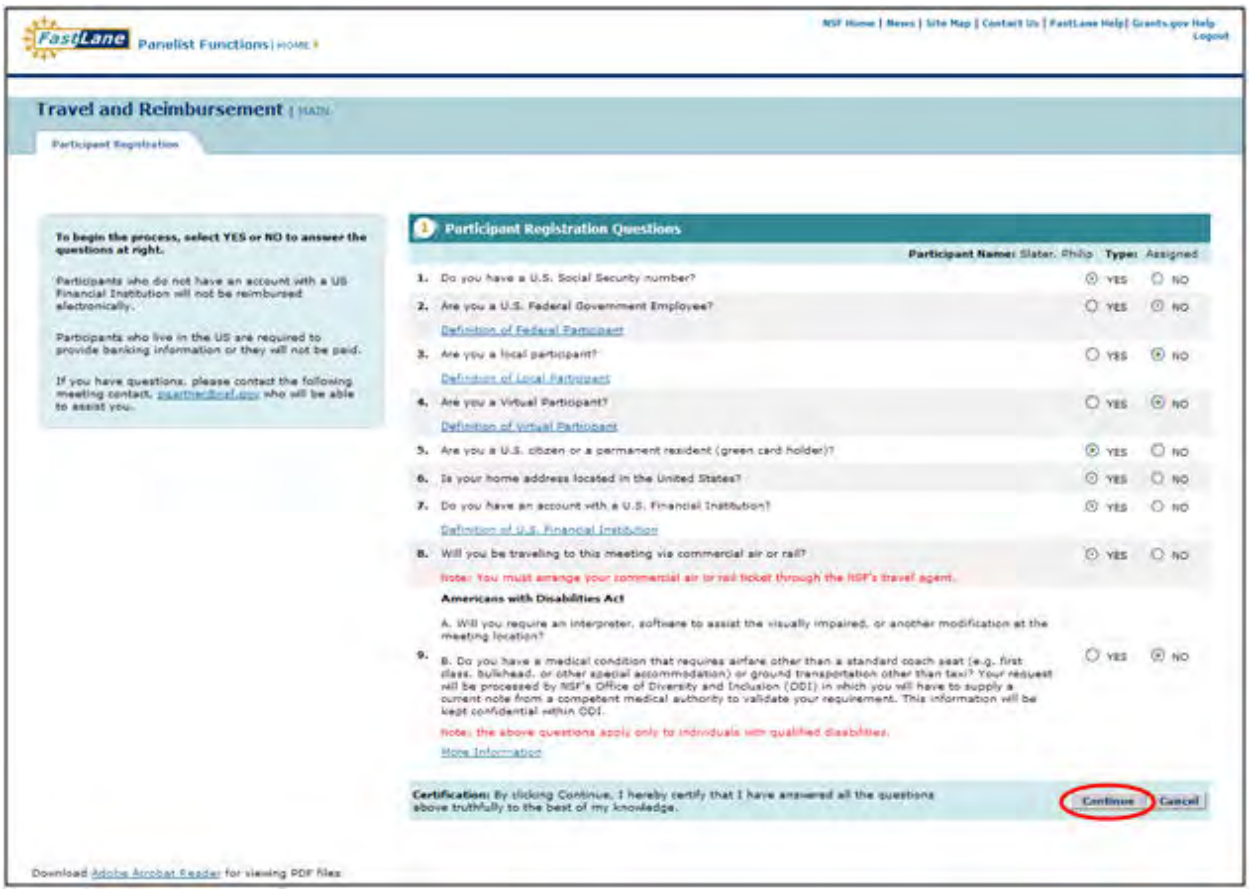

Figure 2 Participant Registration Questions screen. The Continue button is circled.

3. For each of the following questions, select either the Yes or No radio button:
   - Do you have a U.S. Social Security Number?
   - Are you a U.S. Federal Government Employee?
   - Are you a local participant?
   - Are you a Virtual Participant?
   - Are you a U.S. citizen or a permanent resident (green card holder)?
   - Is your home address located in the United States?
   - Do you have an account with a U.S. Financial Institution?
   - Will you be traveling to this meeting via commercial air or rail?
     Note: You must arrange your commercial air or rail ticket through the NSF's travel agent.
   - Americans with Disabilities Act
     A. Will you require an interpreter, software to assist the visually impaired, or another modification at the meeting location?
     B. Do you have a medical condition that requires airfare other than a standard coach seat (e.g. first class, bulkhead, or other special accommodation) or ground transportation other than taxi? Your request will be processed by NSF's Office of Diversity and Inclusion (ODI) in which you will have to supply a current note from a competent medical authority to validate your requirement. This information will be kept confidential within ODI.
     Note: the above questions apply only to individuals with qualified disabilities.

4. Select the **Continue** button (Figure 1).

Note: To help you answer accurately, select the definition links under the questions to see the definition of terms in the question.

*If you answered **Yes** to the question, "Do you have a Social Security Number?"* the **Personal Banking/Contact Information** screen displays and asks you to confirm your Social Security Number.

*If you answered **No** to the question, "Do you have a Social Security Number?"* the **Reviewer Address History** screen displays for you to confirm your reviewer address History.

If you choose to waive payment, NSF will pay only for transportation reserved and purchased though NSF's travel agent. To waive payment for services rendered to NSF, select the waiver of payment check box. The Waiver of Payment Confirmation Screen will display.

Waiver of Payment Confirmation Screen

You must click Waive Payment on the confirmation screen.

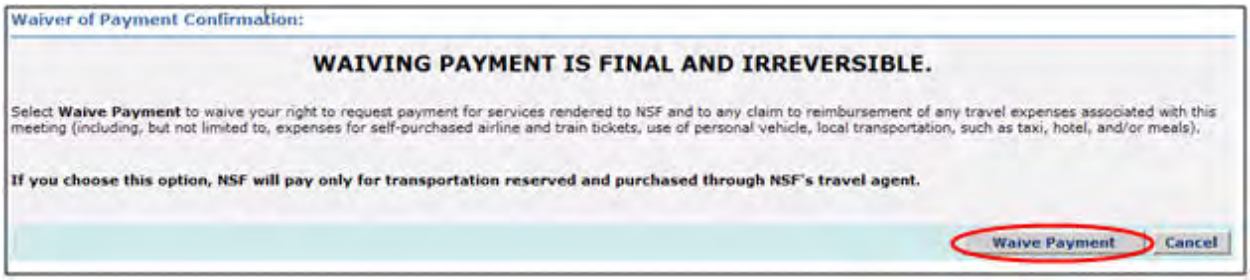

Figure 1 Waiver of Payment Confirmation screen. The Waive Payment button is circled.

1. Select the Waive Payment button (Figure 1).

If you select Waive Payment button, the system does not require you to provide any banking information and the FastLane Panelist Functions home screen will display a message that you have successfully registered and waived payment.

If you select cancel, the Participant Registration Questions will be displayed.

The system displays the FastLane Panelist Functions home screen (Figure 2) with a validation message, "You have successfully registered and waived payment."

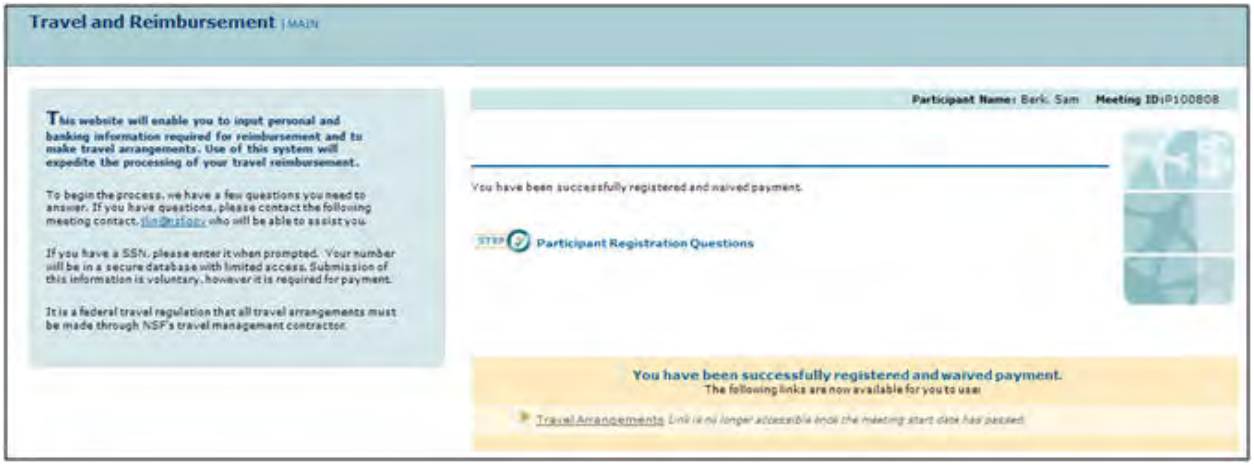

Figure 2 Travel and Reimbursement screen.

Confirm Your Social Security Number

You must confirm your Social Security Number if you answered **Yes** to the participant registration question, "Do you have a Social Security Number?"

1. Access the **Personal Banking/Contact Information** screen (Figure 1) (see Answer Participant Registration Questions).

Figure 1 Personal Banking/Contact Information screen. The Submit button is circled.

2. In the **Enter Social Security Number** box on the **Personal Banking/Contact Information** screen (Figure 1), type your Social Security Number.
3. In the **Re-Enter Social Security Number** box on the **Personal Banking/Contact Information** screen (Figure 1), type your Social Security Number again.
4. Select one of the three radio buttons regarding **Payment Eligibility**:
   - By default, you are eligible for full payment, determined by your answers to the registration questions. If you wish to receive all payment for which you are eligible, select the "Full Payment" option.
   - If you do not wish to enter your Social Security Number, you may select the "No Payment" option.
   - Of you are ineligible to receive compensation for services rendered to NSF for this meeting, based on your employer's policy that you are prohibited from accepting compensation aside from expense reimbursement, select the "Partial Payment" option.
5. Select the **Submit** button (Figure 1). One of two types of **Personal Banking/Contact Information** screens displays for you to submit your contact and banking information, according to whether you have:
   - A U.S. address and a U.S. financial institution
   - A foreign address and a U.S. financial institution

If you choose "Partial Payment" and waive your right to compensation, NSF will only reimburse for expenses incurred. To waive compensation for services rendered to NSF, select the "Partial Payment" radio button and Submit. The Waiver of Compensation Confirmation Screen will display.

Verify Your Reviewer Address History

1. Review and verify your Reviewer Address History with the National Science Foundation (Figure 1).

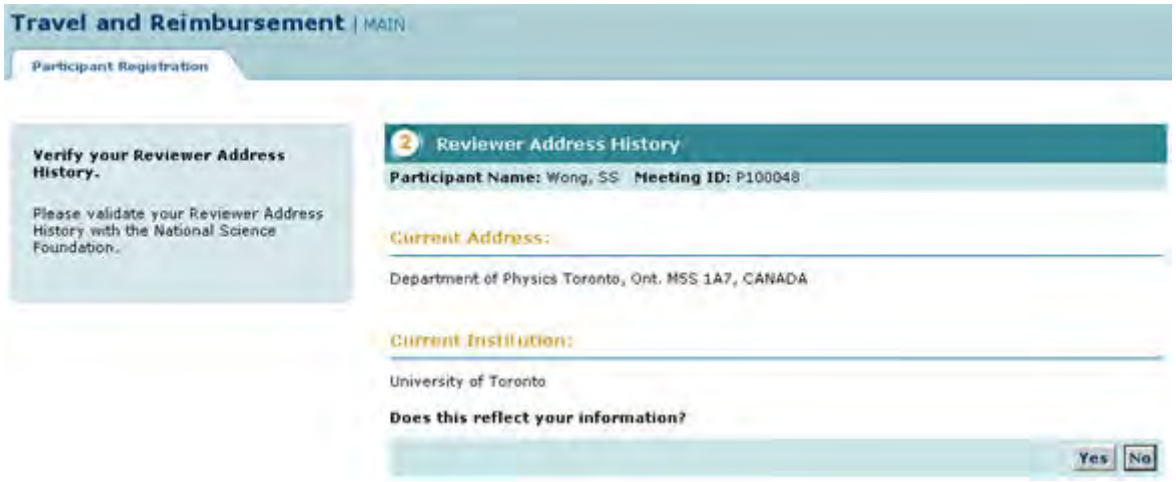

Figure 1 Reviewer Address History page

If the information is correct:
2. Select the **Yes** button (Figure 1).

If the information is not correct:
3. Select the **No** button (Figure 1).

*If you answered **Yes** to the question, "Does this reflect your information?"* the **Personal Contact Information** screen displays.

*If you answered **No** to the question, "Does this reflect your information?"* the **Reviewer Address History Confirmation** screen displays.

Figure 2 Reviewer Address History Confirmation page

Complete Contact and Banking Information

Complete Personal Contact and Banking Information Introduction

Depending upon how you answered the participant registration questions, you will submit personal contact and banking information for one of the following:

- U.S. address and U.S. financial institution
- Foreign address and No U.S. financial institution
- Foreign address and U.S. financial institution

Complete Personal Contact and Banking Information Introduction

Depending upon how you answered the participant registration questions, you will submit personal contact and banking information for one of the following:

- U.S. address and U.S. financial institution
- Foreign address and No U.S. financial institution
- Foreign address and U.S. financial institution

Complete Information for U.S. Address and U.S. Financial Institution

If you have a U.S. Social Security Number (SSN), you must confirm your SSN before you can access the **Personal Banking/Contact Information** screen.

1. Access the **Personal Banking/Contact Information** screen for a U.S. address and U.S. financial institution (Figure 1) (see Answer Participant Registration Questions or Confirm Social Security Number).

Figure 1 Personal Banking/Contact Information screen for a U.S. address and U.S. financial institution.

2. In the **Full Legal Name** section, enter your full legal name under which you file your taxes on the **Personal Banking and Contact Information** screen (Figure 1), do the following:
   - In the **First Name** box, type your first name.
   - In the **Middle Initial** box, type the first letter of your middle name (optional).
   - In the **Last Name** box, type your last name.
   - In the **Suffix** drop down, select your suffix (optional).
3. In the **Permanent U.S. Residence Address** section of the **Personal Banking and Contact Information** screen (Figure 1), do the following:
   - In the **Address 1** box, type the first line of the street address.
   - In the **Address 2** box, type the second line of the street address (optional).
   - In the **Address 3** box, type the third line of the street address (optional).
   - In the **City** box, type your city.
   - In the **State** box, type your state.
   - In the **Zip Code** box, type your zip code.
   - In the **Email Address** box, type your email address.
4. In the **Contact Numbers** section of the **Personal Banking and Contact Information** screen (Figure 1), do the following:

- In the **Business Phone** box, type your business phone.
- In the **Home Phone** box, type your home phone or cell phone number.
- In the **Fax** box, type your fax number (optional).

5. In the **Financial Institution Information** section of the **Personal Banking and Contact Information** screen (Figure 1), do the following:
   - In the **Bank Routing Number** box, type the Bank Routing Number for your U.S. financial institution.
   - In the **Account Number** box, type your account number at this institution.
   - In the **Account Type** box, select the radio button for either checking or savings.
6. Select the **Continue** button (Figure 1). The **Personal Banking/Contact Information Confirmation** screen displays (Figure 2).

Figure 2 Personal Banking/Contact Information Confirmation screen.

7. Confirm that the information you typed is correct.

If you need to edit the information:
Select the **Edit** button (Figure 2), and the **Personal Banking/Contact Information** screen redisplays (Figure 1), where you can change the information.

If the information is correct:
1. Select the **Submit** button (Figure 2). The **Personal Banking/Contact Information Results** screen displays (Figure 3) with a message that your information has been saved.

Figure 3 Personal Banking/Contact Information Results screen. The OK button is circled.

2. Select the **OK** button (Figure 3). The **Travel and Reimbursement Main** screen displays. You have now completed registration for the meeting and can proceed to make travel arrangements or submit expenses if applicable.

Complete Information for Foreign Address and No U.S. Financial Institution

1. Access the **Personal Contact Information** screen for a foreign address and no U.S. financial institution (Figure 1) (see Answer Participant Registration Questions).

Figure 1 Personal Contact Information screen for a foreign address and No U.S. financial institution.

2. In the Full Legal name section, enter your full legal name under which you file your taxes on the **Personal Banking and Contact Information** screen (Figure 1), do the following:
   - In the **First Name** box, type your first name.
   - In the **Middle Initial** box, type the first letter of your middle name (optional).

- In the **Last Name** box, type your last name.
- In the **Suffix** drop down, select your suffix (optional).
- In the **Date of Birth** box, type your date of birth (mm/dd/yyyy).
- In the **Gender Drop** down, select your gender.

3. In the **Permanent Foreign Residence Address** section of the **Personal Contact Information** screen (Figure 1), do the following:
   - In the **Address 1** box, type the first line of the street address.
   - In the **Address 2** box, type the second line of the street address (optional).
   - In the **Address 3** box, type the second line of the street address (optional).
   - In the **City, State / Province, Zip / Postal Code, Country** box, type your city, state/province, zip/postal code, and country.
   - In the **Email Address** box, type your email address.
4. In the **Contact Numbers** section of the **Personal Banking and Contact Information** screen (Figure 1), do the following:
   - In the **Business Phone** box, type your business phone.
   - In the **Home Phone** box, type your home phone or cell phone number.
   - In the **Fax** box, type your fax number (optional).
5. Select the **Continue** button (Figure 1). The **Personal Contact Information Confirmation** screen displays (Figure 2).

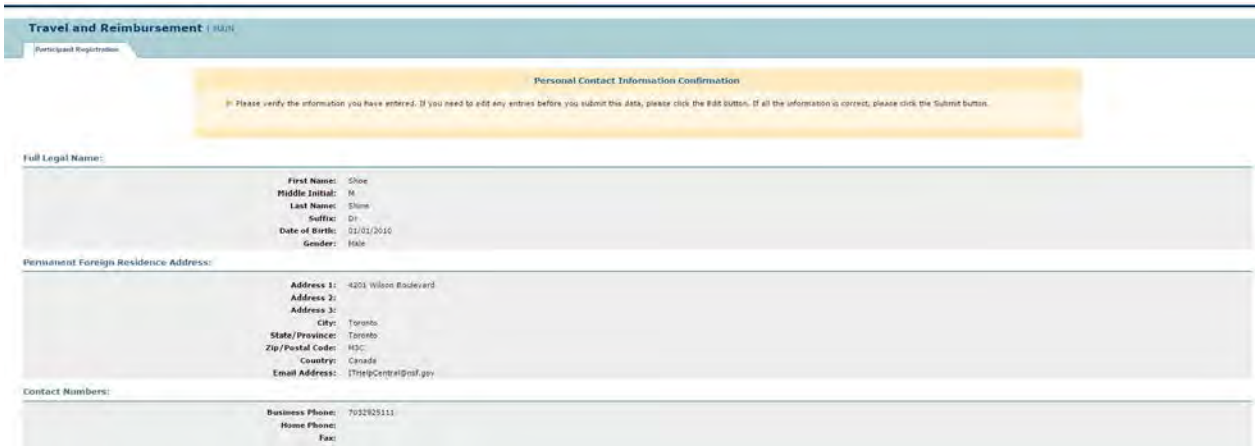

Figure 2 Personal Contact Information Confirmation screen.

6. Confirm that the information you typed is correct.

If you need to edit the information:
Select the **Edit** button (Figure 2). The **Personal Contact Information** screen redisplays (Figure 1), where you can change the information.

If the information is correct:
1. Select the **Submit** button (Figure 2). The **Personal Contact Information Results** screen displays (Figure 3) with a message that your information has been saved.

Figure 3 Personal Contact Information Results screen. The OK button is circled.

2. Select the **OK** button (Figure 3). The **Travel and Reimbursement Main** screen displays. You have now completed registration for the meeting and can proceed to make travel arrangements or submit expenses, if applicable.

Complete Information for Foreign Address and U.S. Financial Institution

If you have a U.S. Social Security Number (SSN), you must confirm your SSN before you can access the **Personal Banking/Contact Information** screen.

1. Access the **Personal Banking/Contact Information** screen for a foreign address and U.S. financial institution (Figure 1) (see Answer Participant Registration Questions or Confirm Social Security Number).

Figure 1 Personal Banking/Contact Information screen for a foreign address and U.S. financial institution.

2. In the Full Legal name section, enter your full legal name under which you file your taxes on the **Personal Banking and Contact Information** screen (Figure 1), do the following:
   - In the **First Name** box, type your first name.
   - In the **Middle Initial** box, type the first letter of your middle name (optional).
   - In the **Last Name** box, type your last name.
   - In the **Suffix** drop down, select your suffix (optional).
3. In the **Permanent Foreign Residence Address** section of the **Personal Contact Information** screen (Figure 1), do the following:
   - In the **Address 1** box, type the first line of the street address.
   - In the **Address 2** box, type the second line of the street address (optional).
   - In the **Address 3** box, type the second line of the street address (optional).
   - In the **City, State/Province, Zip/Postal Code, Country** box, type your city, state/province, zip/postal code, and country.
   - In the **Email Address** box, type your email address.
4. In the **Contact Numbers** section of the **Personal Banking and Contact Information** screen (Figure 1), do the following:
   - In the **Business Phone** box, type your business phone.
   - In the **Home Phone** box, type your home phone or cell phone number.
   - In the **Fax** box, type your fax number (optional).
5. In the **Financial Institution Information** section of the **Personal Banking and Contact Information** screen (Figure 1), do the following:
   - In the **Bank Routing Number** box, type the bank routing number for your U.S. financial institution.
   - In the **Account Number** box, type your account number at this institution.
   - In the **Account Type** box, select the radio button for either checking or savings.
6. Select the **Continue** button (Figure 1). The **Personal Banking/Contact Information Confirmation** screen displays (Figure 2).

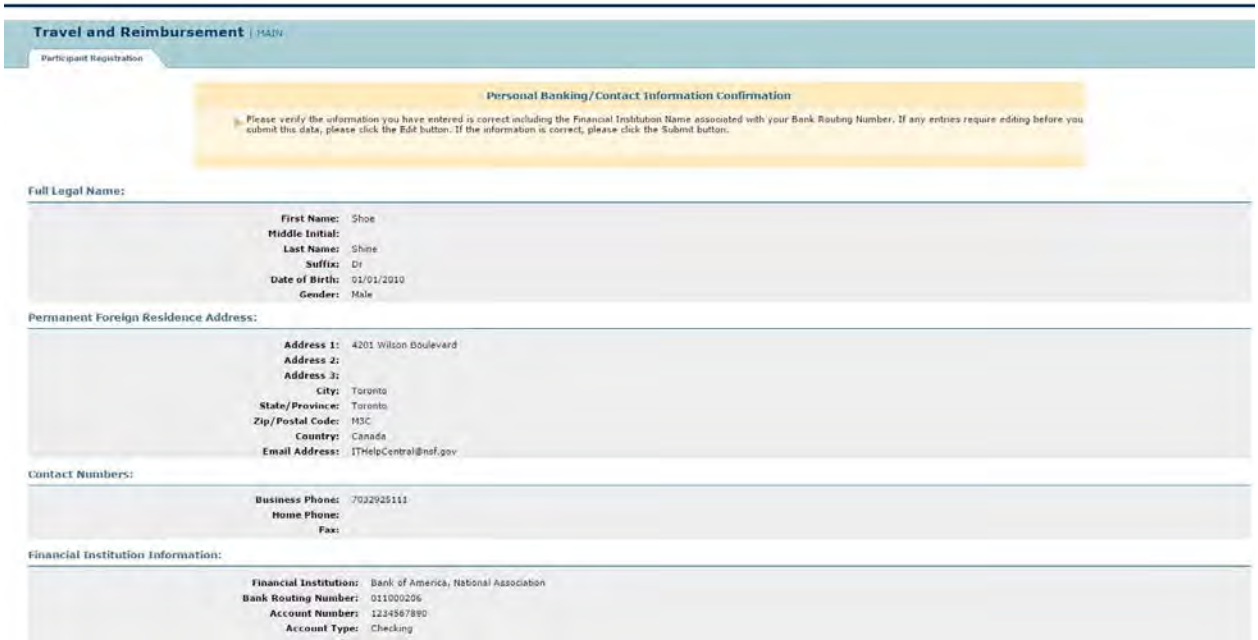

Figure 2 Personal Banking/Contact Information Confirmation screen.

7. Confirm that the information you typed in is correct.

If you need to edit the information:
Select the **Edit** button (Figure 2). The **Personal Banking/Contact Information** screen redisplays (Figure 1), where you can change the information.

If the information is correct:
1. Select the **Submit** button (Figure 2). The **Personal Banking/Contact Information Results** screen displays (Figure 3) with a message that your information has been saved.

Figure 3 Personal Banking/Contact Information Results screen. The OK button is circled.

2. Select the **OK** button (Figure 3). The **Travel and Reimbursement Main** screen displays. You have now completed registration for the meeting and can proceed to make travel arrangements or submit expenses, if applicable.

Make Travel Arrangements

Make Travel Arrangements Introduction

Before you are able to make travel arrangements in FastLane for a meeting, you must first register for a meeting by answering the participant registration questions (Step 1) and entering your personal contact and banking information (Step 2).

The Travel Arrangements application will not be available to you *if you are a local participant, plan to be a virtual participant, or the meeting start date has already occurred*.

See Access Travel Arrangements for instructions on how to access the **Travel Arrangements** screen.

Methods of Making Travel Arrangements

There are two ways to make travel arrangements:

- Complete the e-mail reservation request form
- Call the NSF travel agent

In Travel Arrangements, you can also find information on NSF's suggested hotel or other hotels in the Arlington, Virginia, area.

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- Complete the e-mail reservation request form
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In Travel Arrangements, you can also find information on NSF's suggested hotel or other hotels in the Arlington, Virginia, area.

Access Travel Arrangements

You can access the Travel Arrangements screen, *if you have completed registration for a meeting and if you are not a local participant, are not a virtual participant, or the meeting start date has not yet occurred*.

1. On the **FastLane Home Page** screen (Figure 1), select **Panelist Functions** in the navigation bar at the top. The **Panelist Functions** screen displays (Figure 2).

Figure 1 FastLane Home Page screen. The link for Panelist Functions is circled.

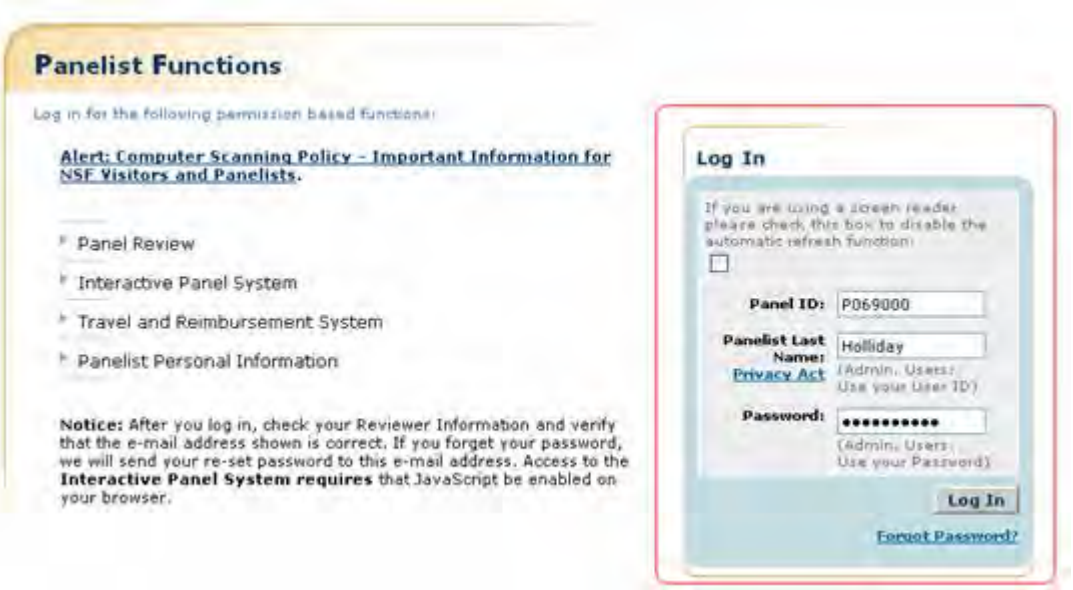

Figure 2 Panelist Functions screen. The Log In section is circled.

2. In the **Log In** section on the **Panelist Functions** screen (Figure 2), do the following:
   - In the **Panel ID** box, type the Panel/Meeting ID that you received from NSF.
   - In the **Panelist Last Name** box, type your last name.
   - In the **Password** box, type the password that you received from NSF.
3. Select the **Login** button (Figure 2). The **Panelist System Selection** screen displays (Figure 3).

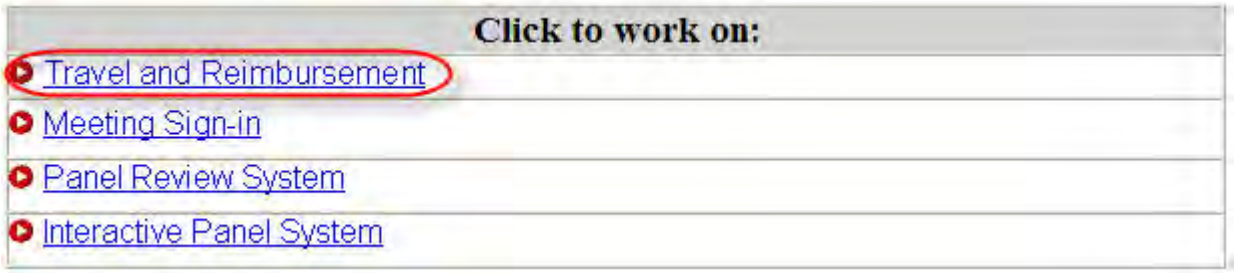

Figure 3 Travel and Reimbursement link at the bottom of the Panelist System Selection screen.

4. Select **Travel and Reimbursement** (Figure 3). The **Travel and Reimbursement Main** screen displays (Figure 4).

Figure 4 Travel and Reimbursement screen. The Travel Arrangements link is circled.

5. Select **Travel Arrangements** (Figure 4).

6. *If you are a Non-Federal, Non-Local, Attending On-Site participant*, the **Travel Arrangements** screen displays as in Figure 5 with the Meeting ID and your participant name at the top right. You have options to do the following:
   - Complete the e-mail reservation request form.
   - Call the NSF travel agent.
   - Find information on NSF's suggested hotel or other hotels in the Arlington, Virginia, area.

Figure 5 Travel Arrangements screen.

If you are a Federal, Foreign Non-Flat Rate, or Workshop participant, the **Travel Arrangements** screen displays as in Figure 6 with the Meeting ID and your participant name at the top right. You have the option of finding information about NSF's suggested hotel or other hotels in the Arlington, Virginia, area.

Figure 6 Travel Arrangements screen with hotel information.

Complete the Email Reservation Request Form

The Email Reservation Request Form is only for arranging transportation. FastLane sends your completed online reservation form directly to the NSF travel management contractor.

1. Access the **Travel Arrangements** screen (Figure 1) (see Access Travel Arrangements).

Figure 1 Travel Arrangements screen. The Email Reservation Request Form link is circled.

2. On the **Travel Arrangements** screen (Figure 1), select **Email Reservation Request**. The **Email Reservation Request Form** screen (Figure 2) displays.

Figure 2 Email Reservation Request Form screen. The Next button is circled.

3. In the **Shipping Address for Ticket Delivery Via Federal Express** section of the **Email Reservation Request Form** screen. The Next button is circled. screen (Figure 2), do the following:
   - In the **Organization Name** box, type the name of the organization you are affiliated with.
   - In the **Address Line 1** box, type your street address.
   - In the **Address Line 2** box, type the second line of the address (optional).
   - In the **City** box, type the city of your address.
   - In the **State** box, select your state from the drop-down list.
   - In the **Zip Code** box, type your zip code (optional for foreign address).
   - In the **Country** box, type the name of the country you are currently located in.
   - In the **Email** address, type the email address where you want to receive NSF communications.
4. In the **Contact Numbers** section (Figure 2), do the following:
   - In the **Business Phone** box, type your business phone.
   - In the **Home Phone** box, type your home phone or cell phone number.
   - In the **Fax** box, type your fax number (optional).
5. In the **Mode of Transportation** section (Figure 2), select the radio button for the mode that you prefer.
6. In the **Departure Airport/Rail Station** section (Figure 2), type the name of the airport or rail station you are departing from (required if you picked either of these modes of transportation.
   Note: Choose an airport/station near your home or office, as NSF will not pay for travel to, or lodging at, this airport/station.
7. In the **Preferred Schedule Information** section (Figure 2), do the following:
   - In the **Earliest date for travel to meeting** box, type that date in mm/dd/yyyy format.
   - In the **Earliest time for travel to meeting** box, type the earliest time you will be ready to leave in hhmm format.

- In the **Latest date for travel to meeting** box, type that date in mm/dd/yyyy format.
- In the **Latest time for travel to meeting** box, type the latest time you will be ready to leave in hhmm format.
  Note: You must enter at least the earliest or latest date and time.
- In the **Earliest date for travel from meeting** box, type that date in mm/dd/yyyy format.
- In the **Earliest time for travel from meeting** box, type the earliest time you will be ready to leave in hhmm format.
- In the **Latest date for travel from meeting** box, type that date in mm/dd/yyyy format.
- In the **Latest time for travel from meeting** box, type the latest time you will be ready to leave in hhmm format.
  Note: You must enter at least the earliest or latest date and time.

8. In the **Preferred Seating** section (Figure 2), select the radio button for your preference (for air travel only).
9. In the **Hotel Request** section (Figure 2), you can request hotel accommodations.

Note: The **Hotel Request** section is to be used if you have NOT been instructed by NSF staff to use a hotel room block or other arrangements for your hotel stay.

10. In the **Special Travel Needs** section (Figure 2), type in the **Comments** box any special needs that you might have for travel. (NSF does not guarantee delivery.)
11. Select the Next button (Figure 2).

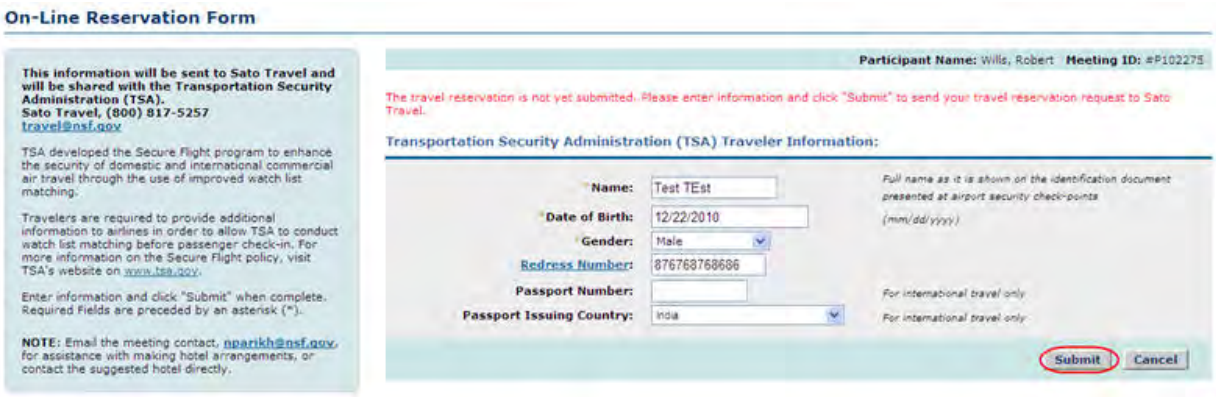

Figure 3 Transportation Security Administration (TSA) Traveler Information (for air travel only).

12. In the **Transportation Security Administration (TSA) Traveler Information** section of the **Email Reservation Request Form screen** screen (Figure 3), do the following:
    - In the Name box, type your full name as it is shown on the identification document presented at airport security check-points.
    - In the **Date of Birth** box, type that date in mm/dd/yyyy format.
    - In the **Gender** box, select your gender from the drop down menu.
    - In the **Redress Number** box, enter your Redress number (optional).
    - In the **Passport Number** box, enter your passport number (optional).
    - In the **Passport Issuing Country** box, select the appropriate country from the dropdown menu (optional)

Figure 4 Email Reservation Request Form Results screen. The OK link is circled.

12. Select **OK** (Figure 4). The **Travel and Reimbursements Main** screen displays.

Call the NSF Travel Agent

You can arrange for transportation by calling the NSF travel management contractor directly.

1. Access the **Travel Arrangements** screen (Figure 1) (see Access Travel Arrangements).

Figure 1 Travel Arrangements screen. The NSF Travel Management Contractor section is boxed.

2. On the **Travel Arrangements** screen (Figure 1), find the name and 1-800 phone number of the NSF travel management contractor.
3. Call the contractor. You must give the contractor your name and Panel/Meeting ID, which is at the top right of the **Travel Arrangements** screen.

Find Hotel Information

1. Access the **Travel Arrangements** screen (Figure 1) (see Access Travel Arrangements). If information is displayed in the **Suggested Hotel Information** section, NSF has reserved a block of rooms at the suggested hotel for the participants of your meeting.

Figure 1 Travel Arrangements screen. The Suggested Hotel Information section is boxed.

2. Contact the hotel directly to make your reservation.

Find Other Hotels in the Arlington, Virginia, Area

1. On the **Travel Arrangements** screen (Figure 2), select **Additional Hotels**. The **Hotels** screen displays (Figure 3).

Figure 2 Travel Arrangements screen. The Additional Hotels link is circled.

Figure 3 Hotels screen. The Go button is circled.

2. In the **View Metro Area** drop-down list (Figure 3), select the stop for the Metropolitan Area Transportation Authority (Metro) that you want to look for hotels near, or choose **All** to view hotels in the entire Washington Metropolitan region.
3. Select the **Go** button (Figure 3). The **Hotels** screen displays (Figure 4) with a listing of information on hotels that are in the area that you chose.

Figure 4 Hotels screen with a listing of information on hotels in the chosen Metro stop area.

4. Click on a hotel name (Figure 4). The hotel's website opens in a new window.

Submit Expenses

Submit Expenses Introduction

To submit travel expenses to NSF you must meet the following criteria:

- Answered No to the participant registration question, "Will you be traveling to this meeting via air or rail?"
- Registered for the meeting and submitted your personal contact and banking information.
- Registered as a Non-Federal, Non-Local, Attending On-Site participant.

NSF reimburses the following expense:

- Personally owned vehicle (POV) mileage and toll expenses for those who used their own automobile, motorcycle, or airplane to get to/from the meeting

Note: Reservations for air or rail transportation must be made through the NSF travel management contractor.

You can edit your expense reimbursement submission up to the point that NSF begins processing it. If you still need to submit more expenses,, you can submit additional POV expenses after NSF has completed processing your initial expenses.

See NSF Policy on Expense Reimbursement for details on those expenses NSF reimburses.

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- Answered No to the participant registration question, "Will you be traveling to this meeting via air or rail?"
- Registered for the meeting and submitted your personal contact and banking information.
- Registered as a Non-Federal, Non-Local, Attending On-Site participant.

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- Personally owned vehicle (POV) mileage and toll expenses for those who used their own automobile, motorcycle, or airplane to get to/from the meeting

Note: Reservations for air or rail transportation must be made through the NSF travel management contractor.

You can edit your expense reimbursement submission up to the point that NSF begins processing it. If you still need to submit more expenses,, you can submit additional POV expenses after NSF has completed processing your initial expenses.

See NSF Policy on Expense Reimbursement for details on those expenses NSF reimburses.

NSF Policy on Expense Reimbursement

- **Panelist Compensation** - In accordance with Internal Revenue Service (IRS) instructions, NSF is required to issue an IRS Form 1099, "Miscellaneous Income," to participants for federal tax filing purposes when annual total compensation exceeds $600.

NSF reimburses participants' approved travel expenses, according to Federal policy. Please keep in mind the following general guidelines when making your travel arrangements:

- **Points of Departure/Return** - The authorized points of travel departure and return are the traveler's official duty station or residence. Travelers will be reimbursed for travel expenses only between these points and the meeting site. On occasion, a traveler may be away from his/her duty station or need to go to another destination after the meeting. If this is the case, and it is for the convenience of the Government, then an alternate authorized point may be used. This must be noted. These are not stopovers. The traveler must begin or end official travel at the other authorized point.
- **Reservations** - Reservations for transportation must be made through the NSF travel management contractor. The Meeting ID is required to make reservations. NSF cannot reimburse over the contract airfare.
- **Common Carrier (airplane, train or bus)** - Travel by common carrier is presumed to be the most advantageous to the Government and is the authorized mode of travel.
- **Contract Carrier Flights** - Travelers are expected to use contract air carrier services provided to Federal agencies at reduced rates through the General Services Administration City Pair Program.

- **International Flights** - Travelers must use U.S.-flag air carriers for international air travel, if available, even if travel on another airline is less expensive. NSF cannot reimburse travelers for transportation on another airline unless U.S.-flag carrier service is not available. A U.S.-flag air carrier is a carrier holding a certificate under Section 401 of the Federal Aviation Act of 1958. The NSF travel management contractor will make travel arrangements in compliance with this regulation.
- **Airline Tickets** - Tickets must be e-tickets unless there is a compelling reason for a paper ticket. Electronic tickets are issued 2 days prior to the travel date. Travelers will receive an email confirmation with an attached electronic invoice. The attached invoice may be used for airport entry.
- **Use of a Personal Vehicle** - Travelers may be authorized to use a personally owned vehicle (POV) as the mode of transportation to NSF meetings, under the following conditions:
    - Travelers sign and submit a mileage statement to the program office sponsoring the meeting. The use of a private vehicle is approved in advance by NSF.
    - Mileage reimbursement is limited to the rates established by the General Services Administration. (See http://www.gsa.gov/ for the current mileage rates.)
    - The total amount of the reimbursement for POV expenses does not exceed the cost of the airfare on a Government contract air carrier.
    - It is NSF Policy that only one form of POV may be claimed per meeting.
- **International Participants** - Citizens of a foreign country who visit the United States usually need to obtain a visa. For NSF meeting participants, this typically is a visitor visa, a non-immigrant visa for travel to the United States for a scientific, educational, or professional meeting or conference on specific dates. Current information on U.S. visa policies is published on the Department of State Bureau of Consular Affairs website.

Access Submit Expenses

1. On the **FastLane Home Page** screen (Figure 1), select **Panelist Functions** in the navigation bar at the top. The **Panelist Functions** screen displays (Figure 2).

Figure 1 FastLane Home Page screen. The link for Panelist Functions is circled.

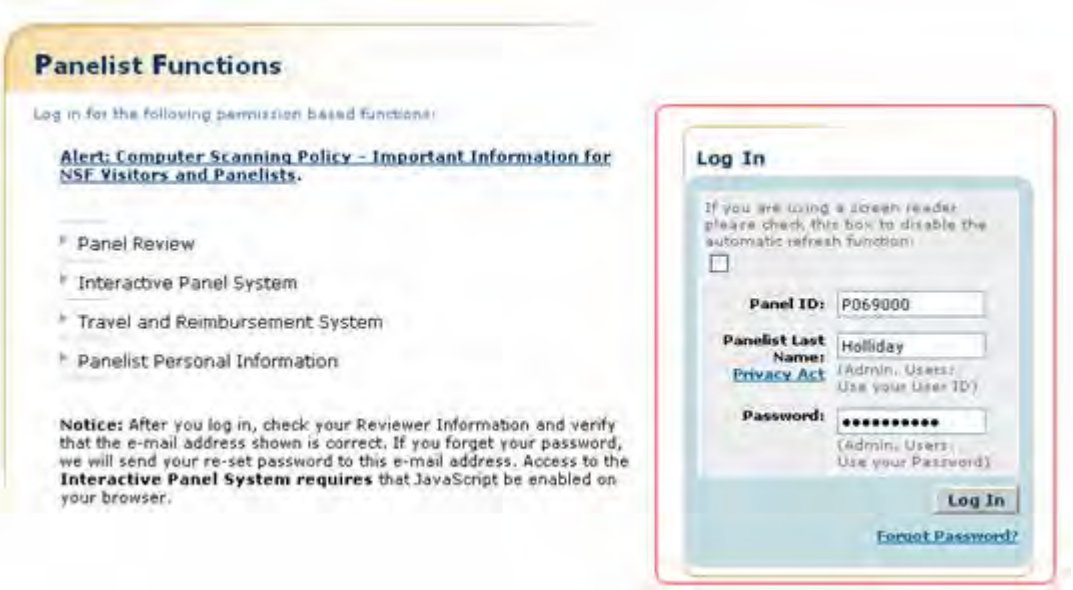


Figure 2 Panelist Functions screen. The Log In section is circled.

2. In the **Log In** section on the **Panelist Functions** screen (Figure 2), do the following:
   - In the **Panel ID** box, type the Panel/Meeting ID that you received from NSF.
   - In the **Panelist Last Name** box, type your last name.
   - In the **Password** box, type the password that you received from NSF.
3. Select the **Login** button (Figure 2). The **Panelist System Selection** screen displays (Figure 3).

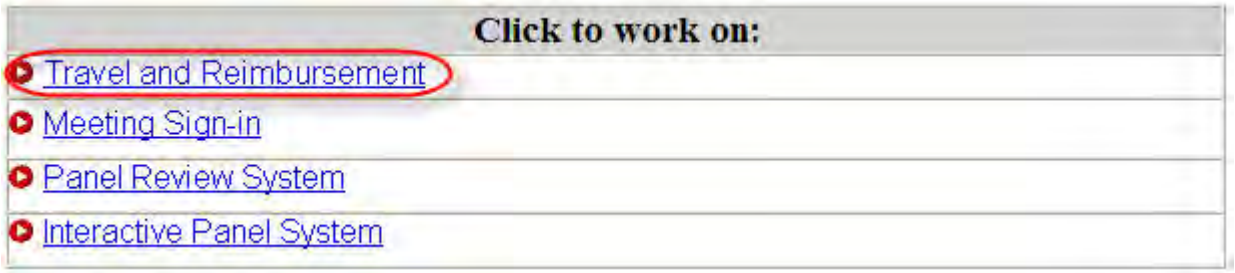


Figure 3 Travel and Reimbursement link at the bottom of the Panelist System Selection screen.

4. Select **Travel and Reimbursement** (Figure 3). The **Travel and Reimbursement Main** screen displays (Figure 4).

Figure 4 Travel and Reimbursement screen. The Submit Expenses link is circled.

5. On the **Travel and Reimbursement** screen (Figure 4), select **Submit Expenses**. The **Submit Expenses** screen displays (Figure 5). You have the options to submit expenses for:
   - Personally owned vehicle (POV) mileage and tolls

Figure 5 Submit Expenses screen.

Submit POV Mileage Expenses

NSF reimburses a participant that used a personal automobile, motorcycle, or airplane to travel to and/or from the meeting. NSF reimburses on the basis of a fixed rate per mile traveled and for toll costs. See NSF Policy on Expense Reimbursement.

1. Access the **Submit Expenses** screen (Figure 1) (see Access Submit Expenses).

Figure 1 Submit Expenses screen. The Personally Owned Vehicle (POV) Mileage link is circled.

2. On the **Submit Expenses** screen (Figure 1), select **Personally Owned Vehicle (POV) Mileage**. **The Personally Owned Vehicle (POV) Mileage** screen displays (Figure 2).

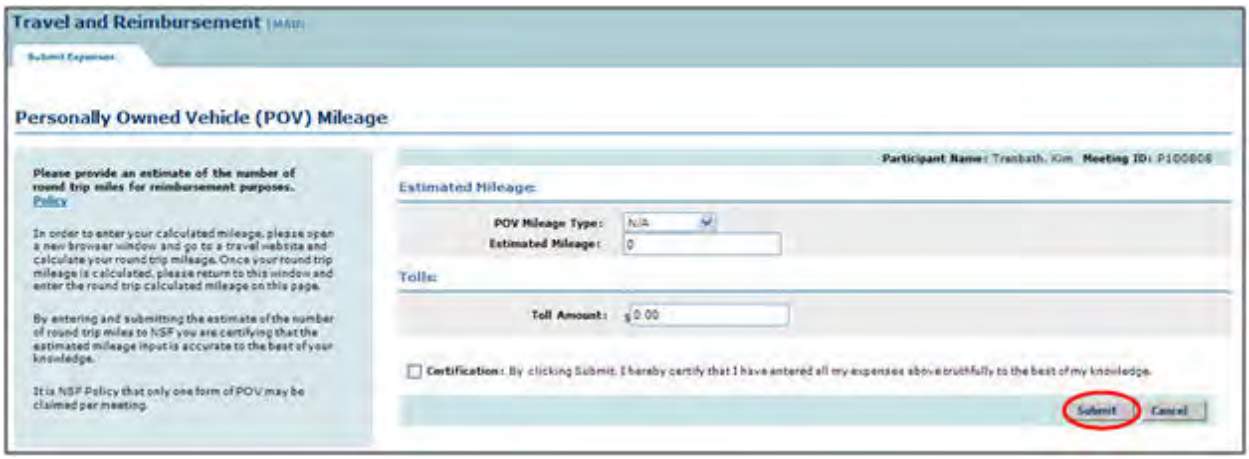


Figure 2 Personally Owned Vehicle (POV) Mileage screen. The Submit button is circled.

3. In the **Estimated Mileage** section (Figure 2), do the following:
   - In the **POV Mileage Type** drop-down list, choose the type of vehicle you used.
   - In the **Estimated Mileage** box, type the number of round-trip miles you traveled. (Calculate your miles with the help of a travel website.)
4. In the **Tolls** section, type the amount that you spent on tolls.
5. Select the Certification then **Submit** button (Figure 2). A screen displays (Figure 3) with the message that your expenses have been submitted.

Figure 3 Screen with message that your expenses have been submitted to NSF for approval. The OK button is circled.

6. Select **OK** (Figure 3). The **Travel and Reimbursement Main** screen displays.

You can edit your expenses up to the point that NSF begins processing your submission.

Submit Additional POV Expenses

You can submit additional expenses only after NSF has completed processing of your initial POV expenses submission. See NSF Policy on Expense Reimbursement for details on what can be reimbursed.

1. Access the **Submit Expenses** screen (Figure 1) (see Access Submit Expenses).

Figure 1 Submit Expenses screen. The Personally Owned Vehicle (POV) Mileage link is circled.

2. On the **Submit Expenses** screen (Figure 1), select **Personally Owned Vehicle (POV) Mileage**. The **Personally Owned Vehicle (POV) Mileage** screen displays (Figure 2).

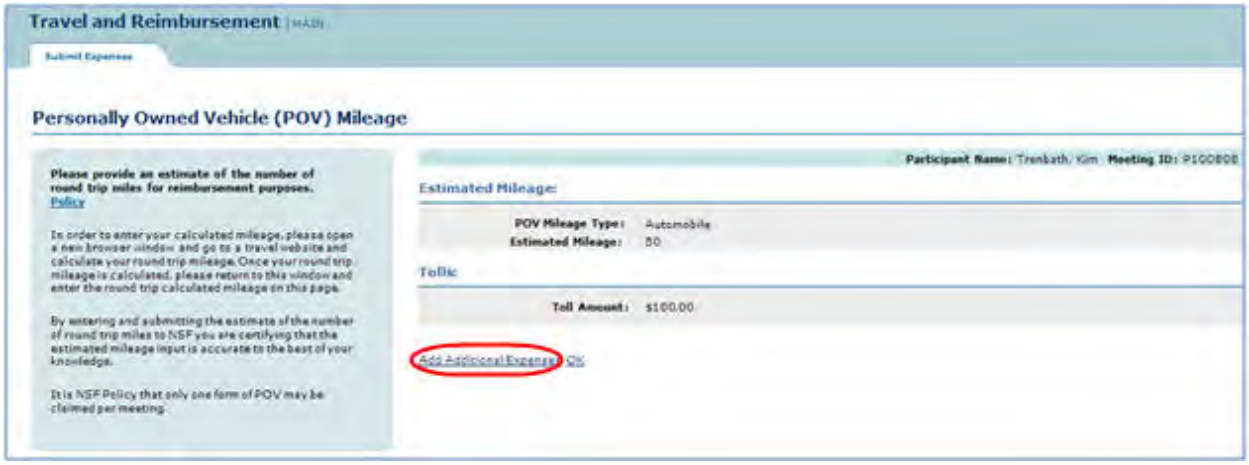


Figure 2 Personally Owned Vehicle (POV) Mileage screen. The Additional Expenses link is circled.

3. Click **Additional Expenses** (Figure 2). The **Additional Expenses for Personally Owned Vehicle (POV) Mileage** screen displays (Figure 3).

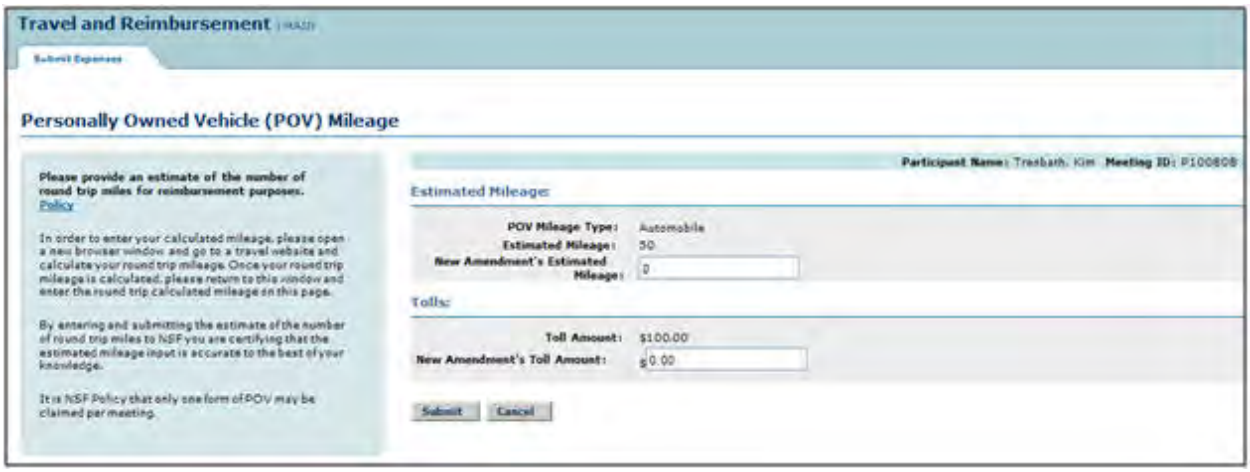


Figure 3 Additional Expenses screen for Personally Owned Vehicle (POV) Mileage.

4. In the **New Amendment's POV Mileage** box (Figure 3), type the additional amount of POV mileage.
5. In the **New Amendment's Toll Amount** box (Figure 3), type the additional amount of toll expenses.
6. Select the **Submit** button (Figure 3). A screen displays (Figure 4) with the message that your additional POV expense amount has been submitted to NSF for approval.

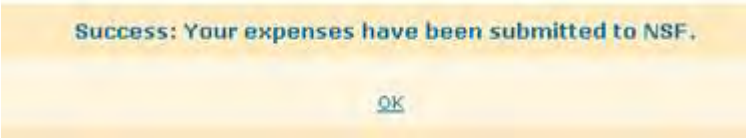


Figure 4 Screen with the message that your expenses have been submitted to NSF for approval.

7. Select **OK** (Figure 4). The **Travel and Reimbursement Main** screen displays.

Meeting Sign-In

Meeting Sign-In Introduction

Print the contents of the Meeting Sign-In book

Meeting sign-in is available for each day of the meeting. The Meeting Sign-in Screen will enable you to review your reimbursement profile, answer transportation questions, and sign-in with your specific type of attendance for the day. The transportation questions only need to be answered on the first day of the meeting. Attendance type selection and sign-in is needed on a daily basis for the duration of the meeting.

To Access Meeting Sign-in see Access Meeting Sign-in.

For each meeting, you must complete the following three steps:

1. Review the reimbursement profile.
2. Select answers to the transportation questions.

3. Select an attendance type and sign in.

Meeting Sign-In Introduction

Print the contents of the Meeting Sign-In book

Meeting sign-in is available for each day of the meeting. The Meeting Sign-in Screen will enable you to review your reimbursement profile, answer transportation questions, and sign-in with your specific type of attendance for the day. The transportation questions only need to be answered on the first day of the meeting. Attendance type selection and sign-in is needed on a daily basis for the duration of the meeting.

To Access Meeting Sign-in see Access Meeting Sign-in.

For each meeting, you must complete the following three steps:

1. Review the reimbursement profile.
2. Select answers to the transportation questions.
3. Select an attendance type and sign in.

Access Meeting Sign-In

1. On the **FastLane Home Page** screen (Figure 1), select **Panelist Functions** in the navigation bar at the top. The **Panelist Functions** screen displays (Figure 2).

Figure 1 FastLane Home Page screen. The link for Panelist Functions is circled.

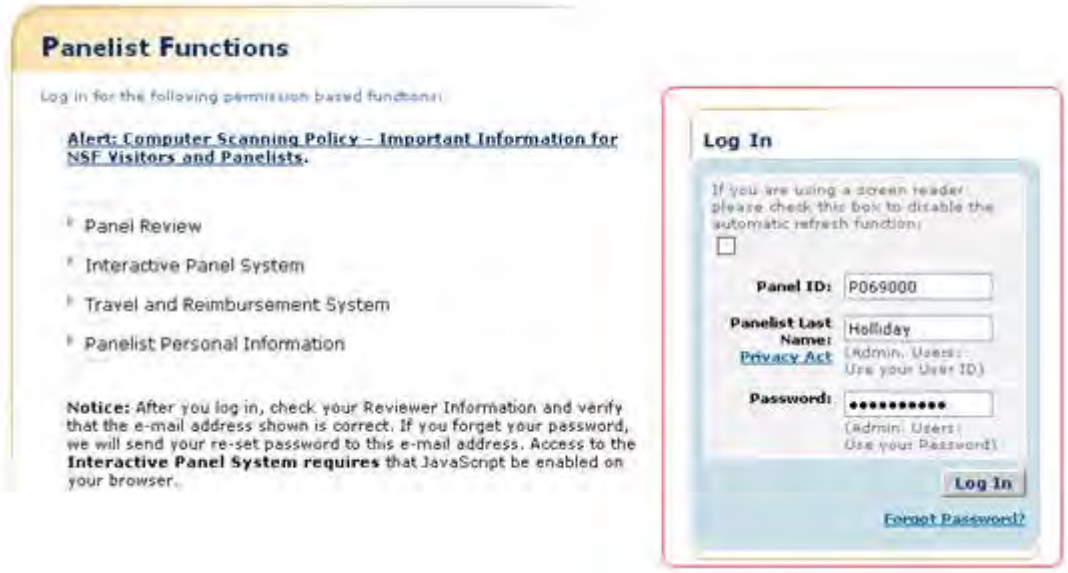


Figure 2 Panelist Functions screen. The Log In section is surrounded in red.

2. In the **Log In** section on the **Panelist Functions** screen (Figure 2), do the following:
   - In the **Panel ID** box, type the Panel/Meeting ID that you received from NSF.
   - In the **Panelist Last Name** box, type your last name.
   - In the **Password** box, type the password.

3. Select the **Login** button (Figure 2). The **Panelist System Selection** screen displays (Figure 3).

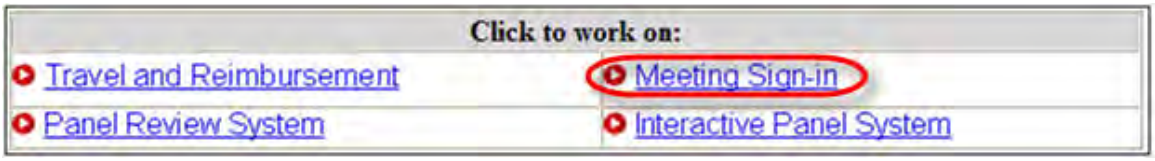


Figure 3 Meeting Sign-in link at the bottom of the Panelist System Selection screen.

4. **Select** the Meeting Sign-in link (Figure 3).

Meeting Sign-In

Complete Daily Meeting Sign-in

1. Access the **Panelist Functions** Main Page.

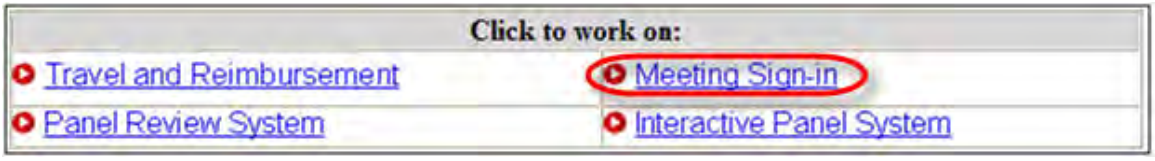


Figure 1 Panelist Functions section of the Panelist System Selection screen.

2. Click on the **Meeting Sign-in** Link at the bottom of the page.

3. View the **Meeting Sign-in** Screen.

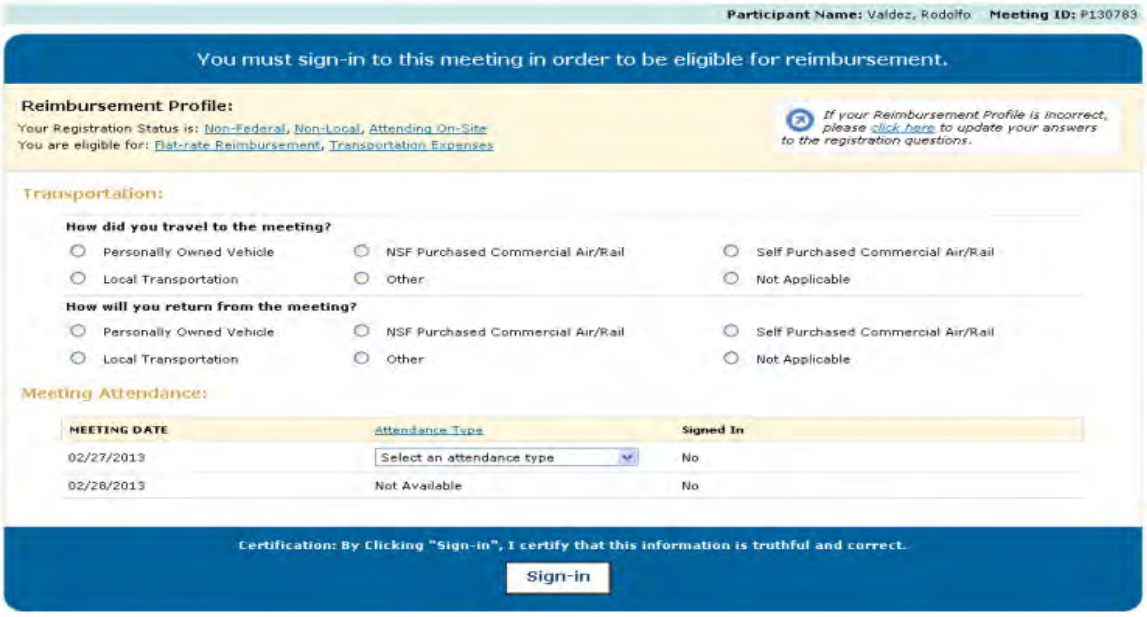


Figure 2 Meeting Sign-in Screen

Reviewing Reimbursement Profile

The Meeting Sign-in Screen will display a participant's current registration status as well as the type of reimbursement for which the participant is eligible. This status is determined by the answers provided during meeting registration. For definitions to terminology, click on one of the hyperlinked terms within the reimbursement profile.

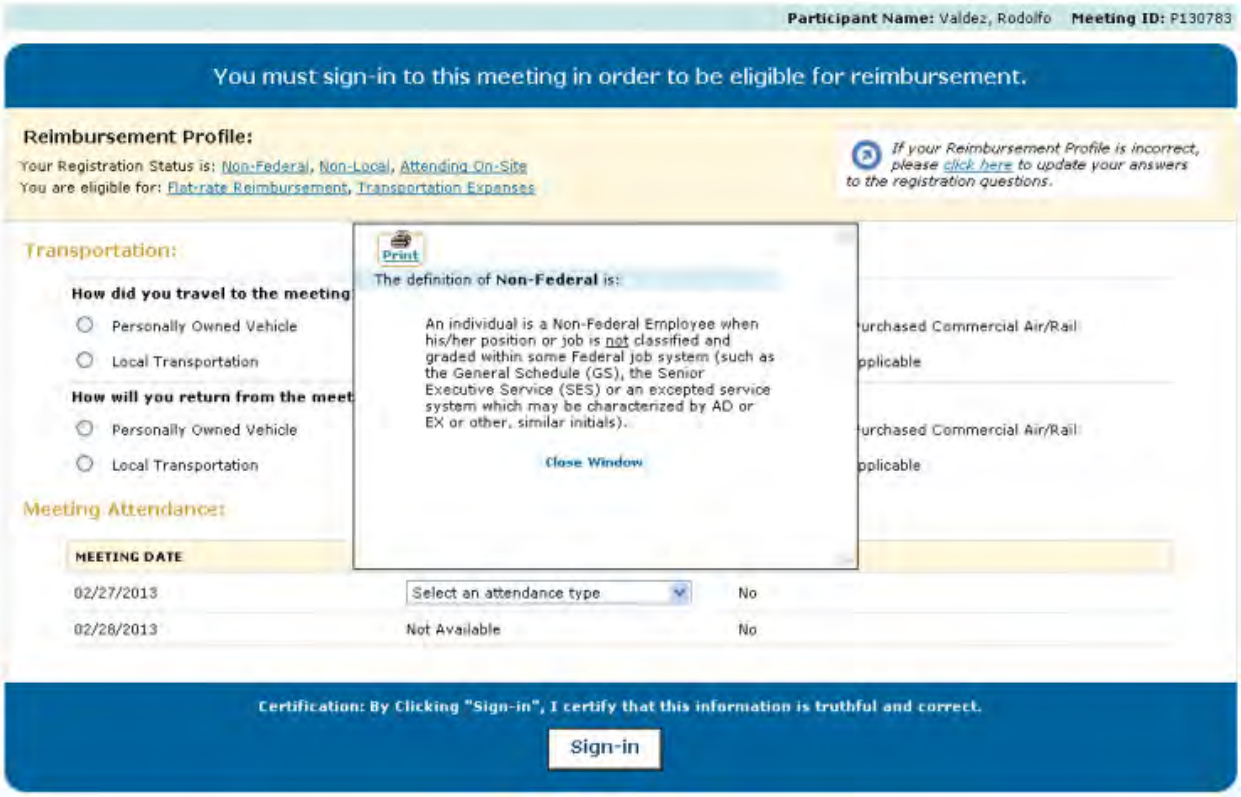


Figure 3 Meeting Sign-in Screen after clicking the "Non-Federal Participant" hyperlink.

Should a participant deem their registration profile to be incorrect, the link to update registration questions will enable the participant to review and edit the answers to the registration questions.

The reimbursement profile hyperlinks and the link to the registration questions are available throughout the duration of the meeting.

Answering Transportation Questions

The Meeting Sign-in Sheet will require panelists to answer two transportation questions before signing-in.

1. **"How did you travel to the meeting?"**
2. **"How will you return from the meeting?"**

Select an answer from the radio button options to each question. The transportation questions only need to be answered once, on the first day of signing-in for the meeting.

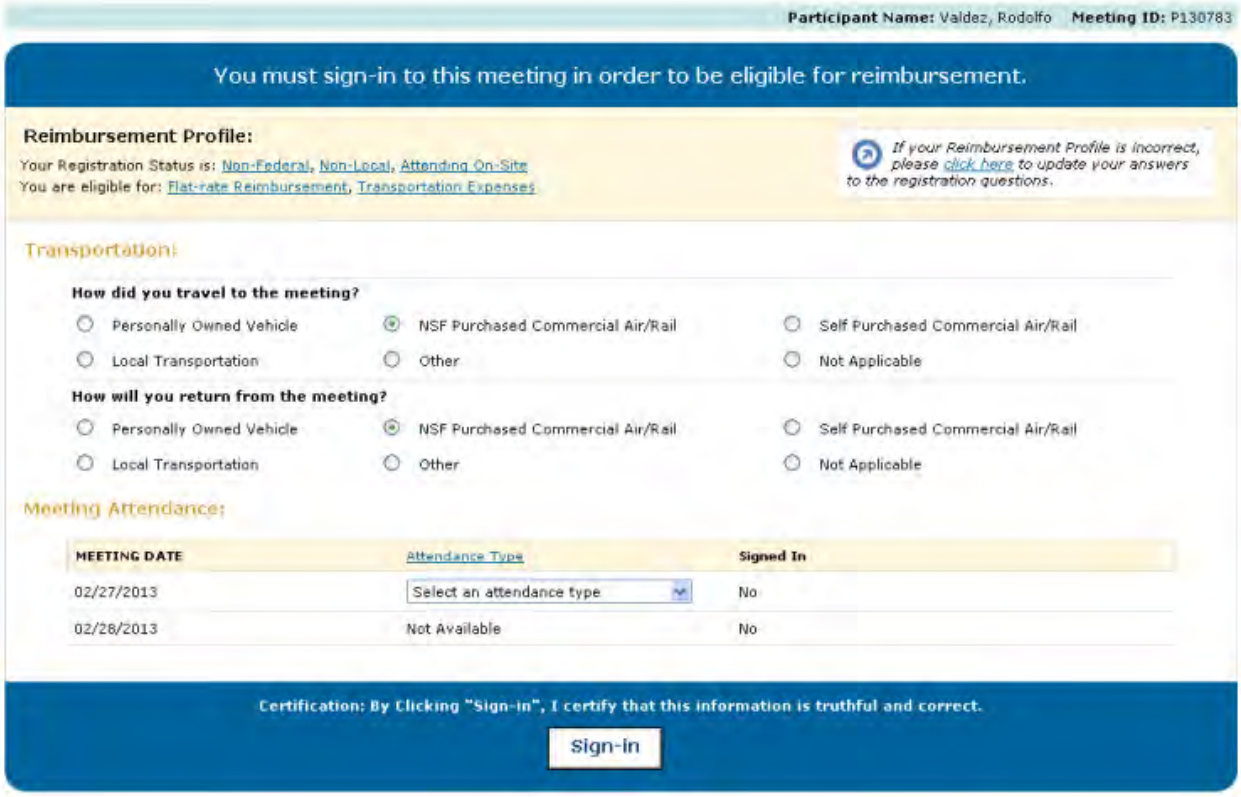


Figure 4 Meeting Sign-in Screen with NSF Purchased Commercial Air/Rail selected as answers to the Transportation Questions.

Meeting Attendance

1. Select an Attendance Type for the current day from the dropdown.
    - In Person- NSF
    - In Person- Other Meeting Location
    - TeleConference
    - Webcast
    - VideoConference
    - Online Forum
    - Other

    For definitions to the attendance types, click on the “Attendance Type” hyperlink above the dropdown.

2. Click Sign-in, to sign-in to the meeting for that day. A message will appear at the top of the sign-in screen to alert you that the sign-in has been successful and will provide a link to the Panelist Functions Home Page. Additionally, the “Signed in” column will now reflect the sign in for the day, by changing from “No” to “Yes.”

Attendance type can be changed for the duration of the meeting day. Once the meeting day has passed, the panelist will be unable to change the attendance type for any day other than the current day.

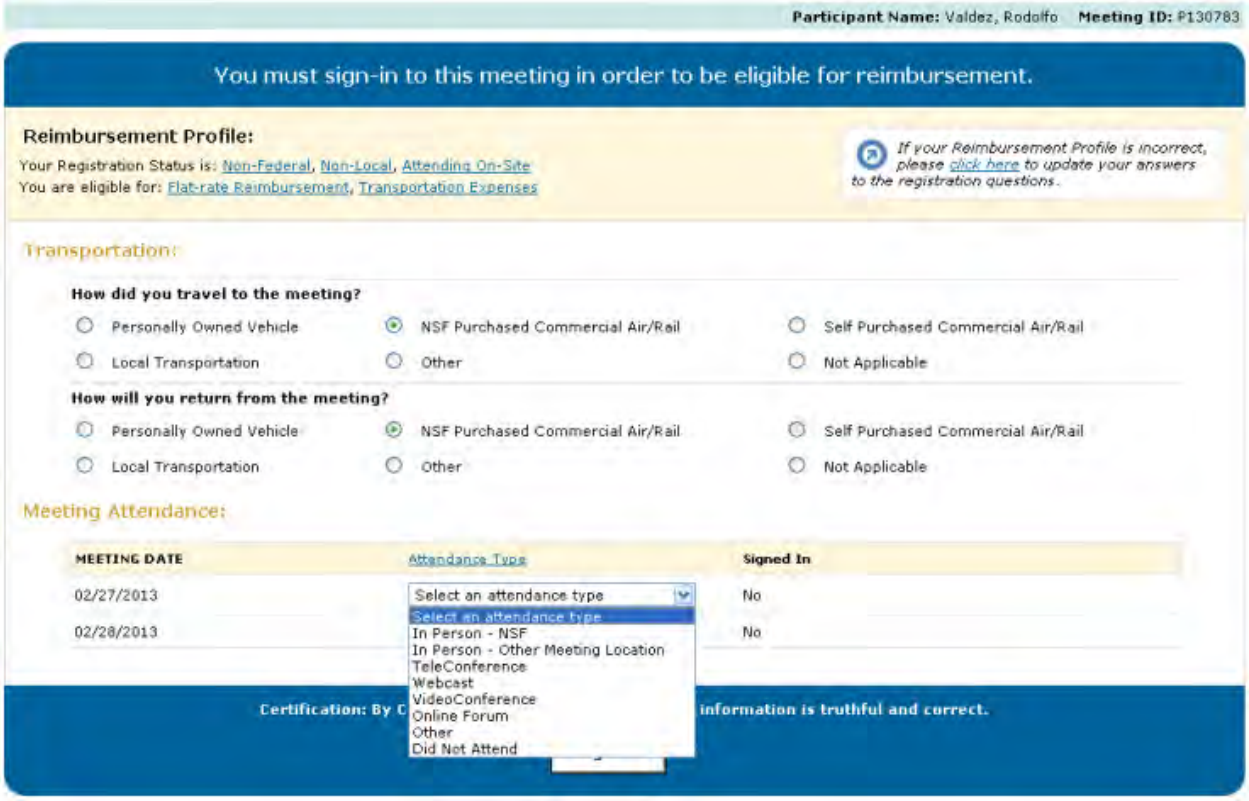


Figure 5 Meeting Sign-in Screen with Cursor on the Attendance Type Dropdown.

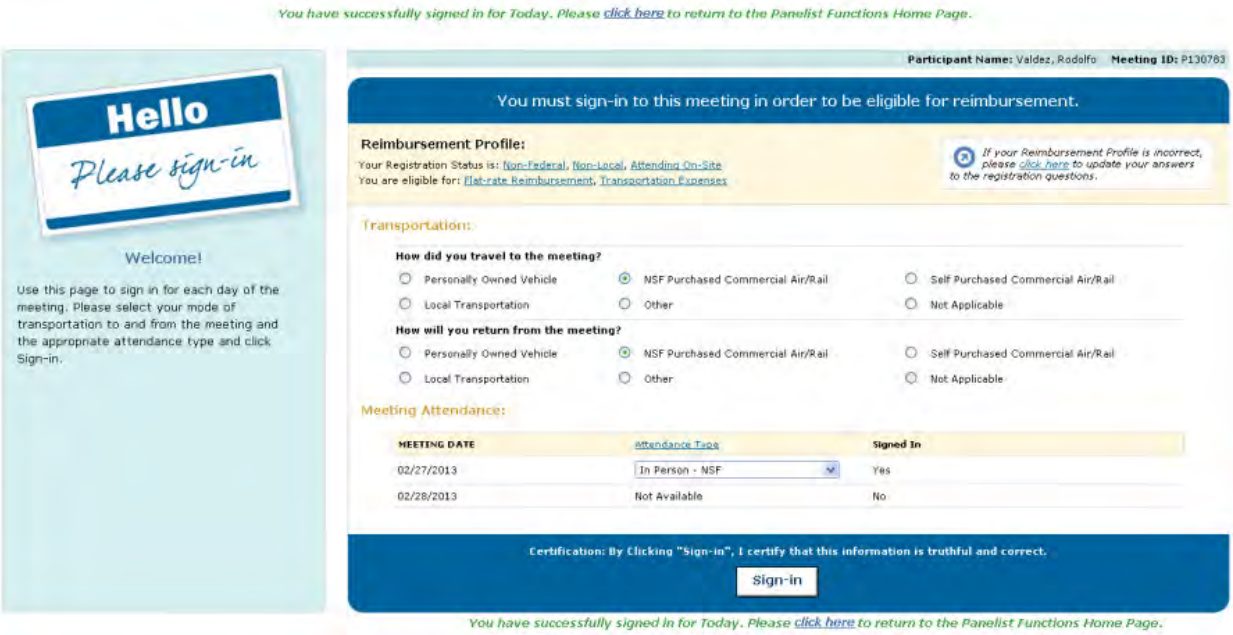


Figure 6 Meeting Sign-in Screen after signing-in to the meeting.

Panel Review System

Panel Review System Introduction

Print the contents of the Panel Review System book.

Panelists can do the following in the Panel Review System:

- View a proposal
- Download a proposal
- Create a panel review draft
- Submit a panel review
- Edit a submitted panel review

Panel Review System Introduction

Print the contents of the Panel Review System book.

Panelists can do the following in the Panel Review System:

- View a proposal
- Download a proposal
- Create a panel review draft
- Submit a panel review
- Edit a submitted panel review

View a Proposal in the Panel Review System

To view a proposal in PRS, do the following:

1. Access FastLane by pointing your browser to www.fastlane.nsf.gov
2. Click **Panelist Functions**. The **Panelist Functions** screen displays.
3. Log in to the Panelist Functions with the initial log on information provided by your Program Officer (PO). The **Panelist System Selection** screen displays (Figure 1).

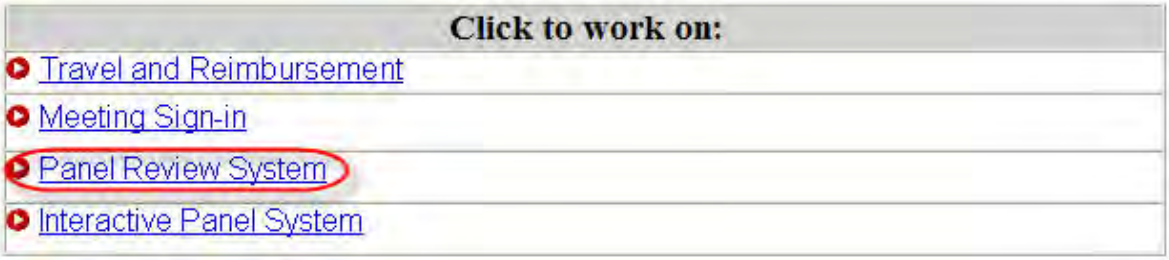


Figure 1 Panel Review System link at the bottom of the Panelist System Selection screen.

4. At the bottom of the Panelist System Selection screen, click **Panel Review System** (Figure 1). The Panel Review screen displays (Figure 2).

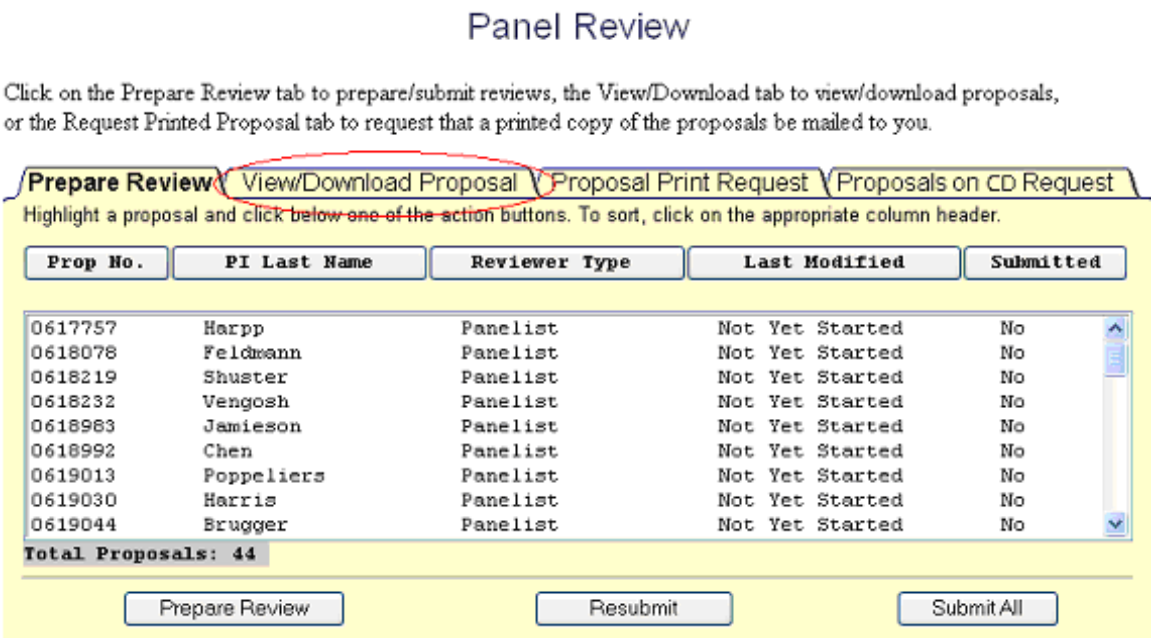


Figure 2 Panel Review screen. The View / Download Proposal tab is circled.

5. Click the **View / Download Proposal** tab (Figure 2) if it is not already selected. The **Panel Review** screen displays on the **View / Download Proposal** tab (Figure 3).

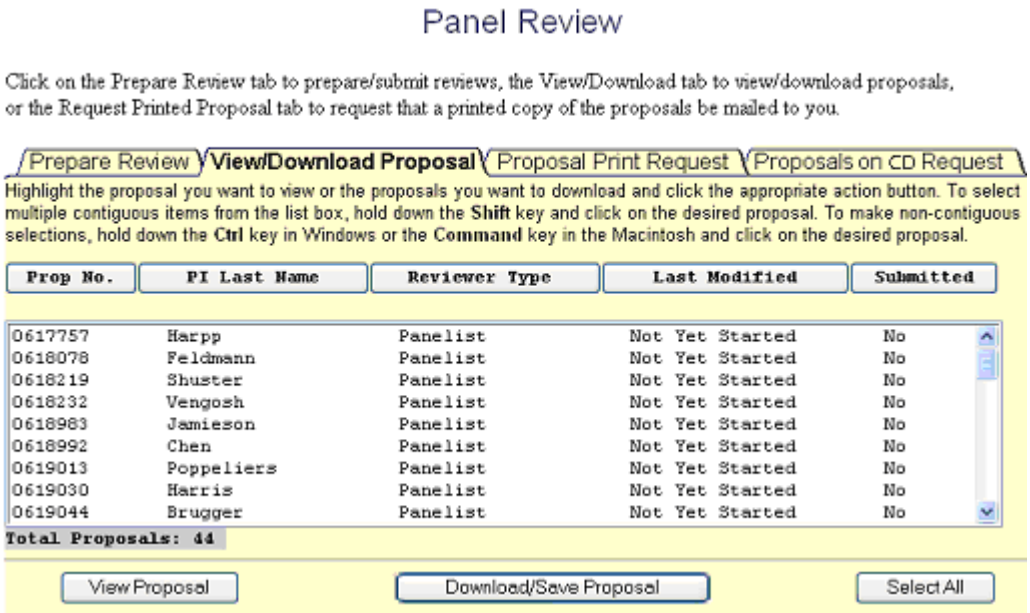


Figure 3 Panel Review screen on the View / Download Proposal tab.

5. Select the proposal you want to look at by clicking the name.
6. View the proposal in one of the two following ways:

- Online by clicking the **View Proposal** button (Figure 2). The proposal opens in the browser.
- Off-line by clicking the **Download/Save** button (Figure 2).

Related Topics:
Proposal Review

Prepare a Panel Review

After reviewing the proposal, prepare a Panel Review as follows, keeping in mind the review guidelines:

1. Access FastLane by pointing your browser to www.fastlane.nsf.gov
2. Click **Panelist Functions**. The **Panelist Functions** screen displays.
3. Log in to the Panelist Functions with the initial log on information provided by your Program Officer (PO). The **Panelist System Selection** screen displays (Figure 1).
4. Locate the **Click to Work On** section at the bottom of the **Panelist System Selection** screen. (Figure 1).
5. Click **Panel Review System** (Figure 1).

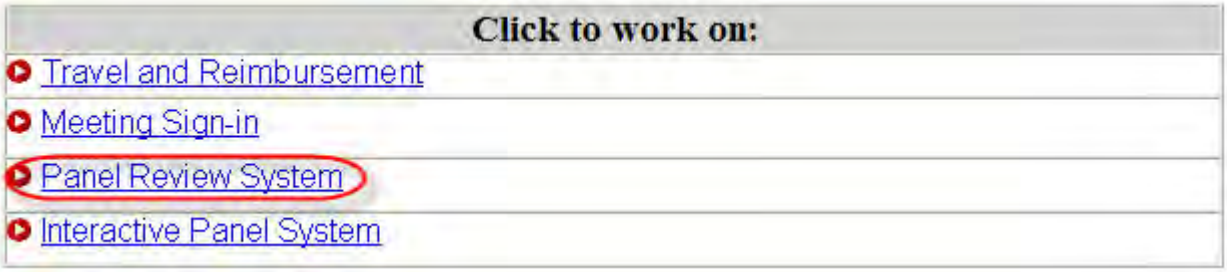


Figure 1 Panel Review System link at the bottom of the Panelist System Selection screen.

6. Click the **Prepare Review** tab is it is not already selected.
7. Select the proposal from the list of proposals that you want to prepare a review for.
8. Click the **Prepare Review** button (Figure 2). The **Panel Review** screen displays.

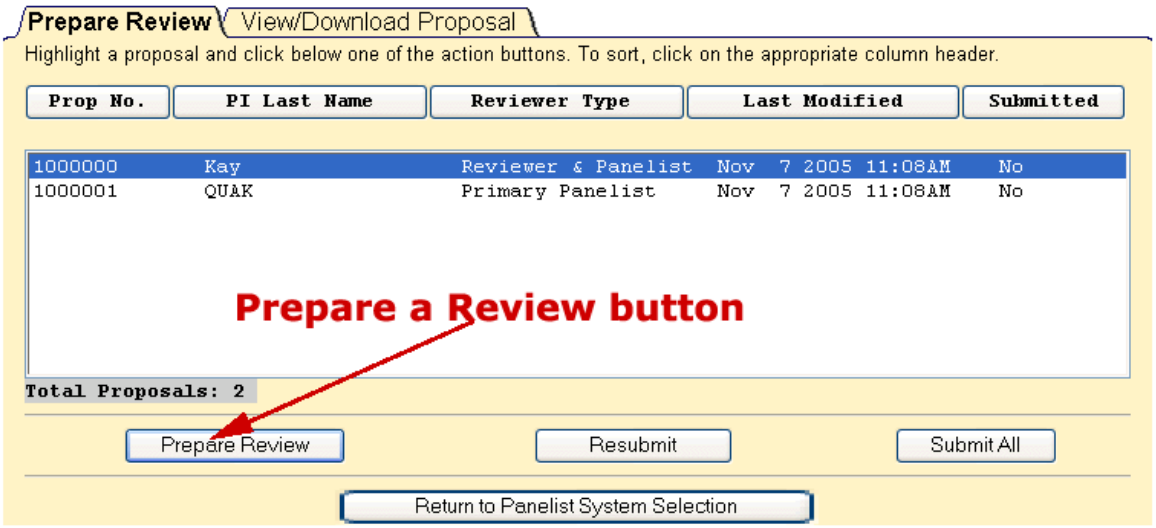


Figure 2 Prepare Review button on the Panelist System Selection screen.

9. (Optional) Check the **Please check this box if you want to receive an email copy of your review** box (Figure 3) from the **Work in Progress** section if you want a copy of your review emailed to you.

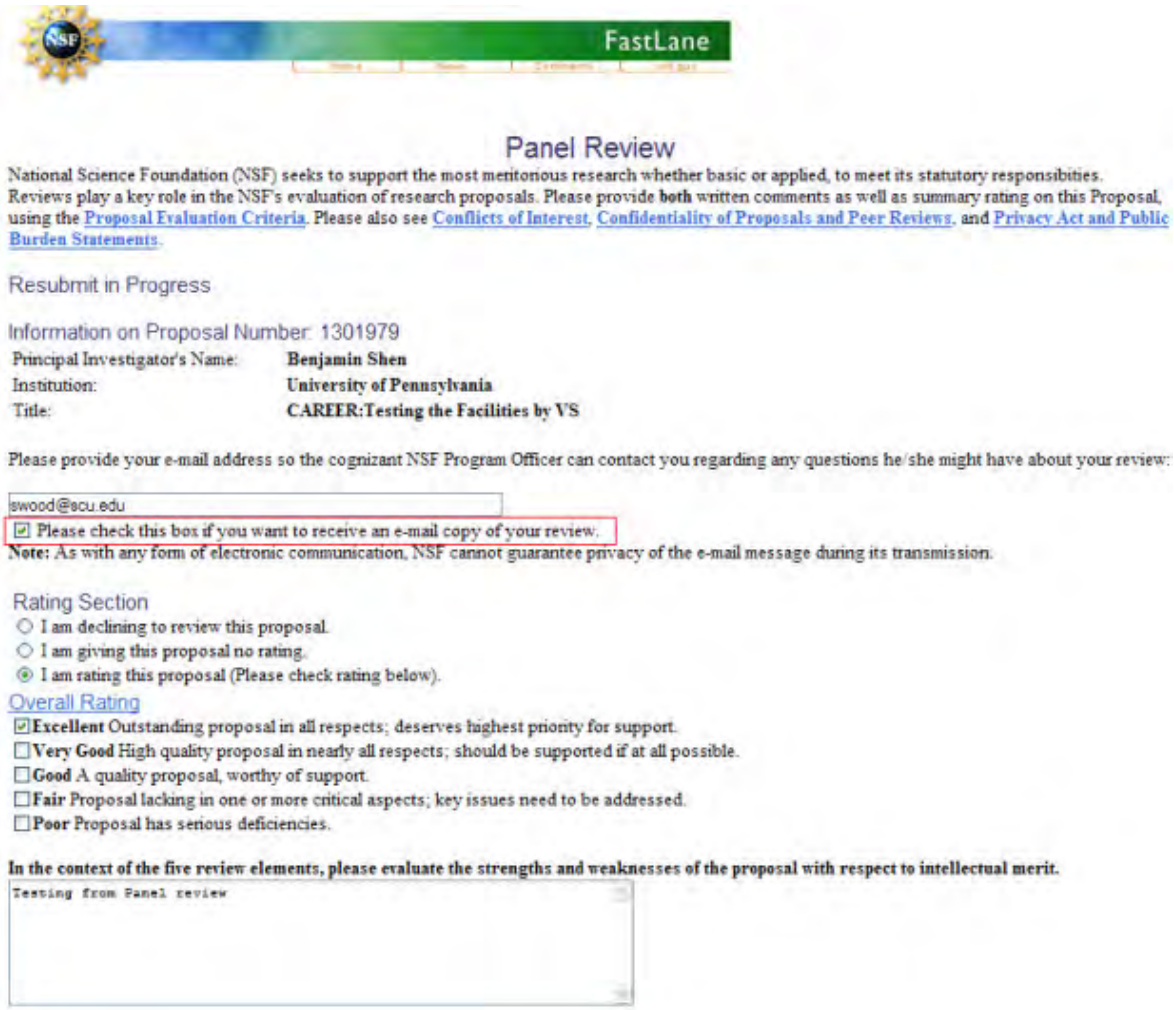


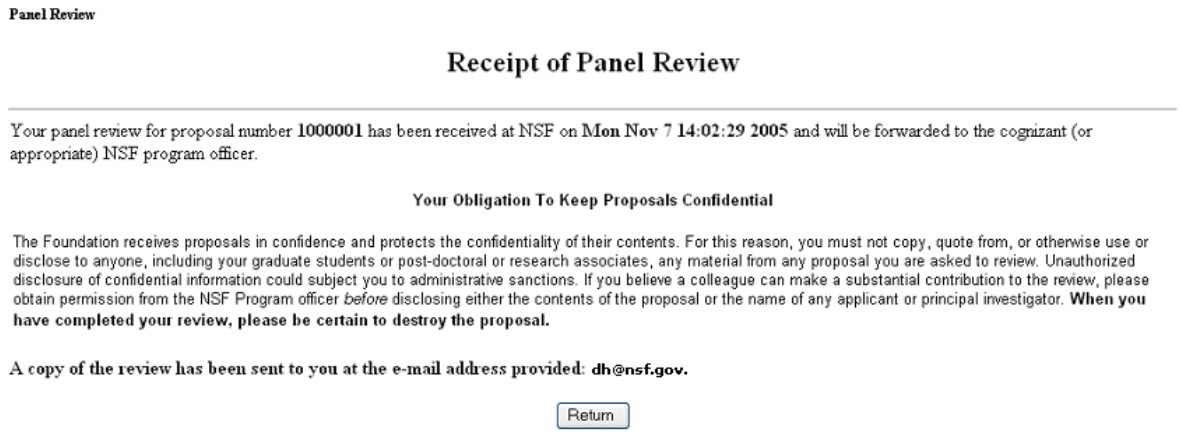
Figure 3 Panel Review screen.

10. Indicate in the **Rating** section whether you intend to rate the proposal (Figure 3).
11. Select your rating from the **Overall Rating** section if you selected **I am rating this proposal** from the **Rating** section (Figure 3).
12. In the **first** text box of the **Overall Rating** section (Figure 3), in the context of the five review elements, type your evaluation of the proposal with respect to intellectual merit.
13. In the **second** text box of the **Overall Rating** section (Figure 3), in the context of the five review elements, type your evaluation of the proposal with respect to broader impacts.
14. In the **third** text box of the **Overall Rating** section (Figure 3), type your evaluation of the proposal with respect to any additional solicitation-specific review criteria, if applicable.

15. Type an evaluative summary in the **Summary Statement** box (Figure 3). The summary should describe your overall assessment of the proposal based on the review criteria.
16. Type any suggestions in the **Other Suggested Reviewers** box (Figure 3).
17. Identify any conflicts of interest you may have in reviewing the proposal in the **Conflicts of Interest Text** box (Figure 3).
18. Click the **Submit Review** button to submit the review (Figure 3). The **Receipt of Panel Review** screen displays (Figure 4). Or, click the **Save Review** button to save your work without submitting the review (Figure 3). Or, click **Go Back** to cancel your changes (Figure 3).

NOTE: Once you have submitted a review it is no longer accessible from the Panel Review System.

18. Click the **Return** button on the **Receipt of Panel Review** screen (Figure 4).



Panel Review

Receipt of Panel Review

Your panel review for proposal number **1000001** has been received at NSF on **Mon Nov 7 14:02:29 2005** and will be forwarded to the cognizant (or appropriate) NSF program officer.

Your Obligation To Keep Proposals Confidential

The Foundation receives proposals in confidence and protects the confidentiality of their contents. For this reason, you must not copy, quote from, or otherwise use or disclose to anyone, including your graduate students or post-doctoral or research associates, any material from any proposal you are asked to review. Unauthorized disclosure of confidential information could subject you to administrative sanctions. If you believe a colleague can make a substantial contribution to the review, please obtain permission from the NSF Program officer *before* disclosing either the contents of the proposal or the name of any applicant or principal investigator. **When you have completed your review, please be certain to destroy the proposal.**

A copy of the review has been sent to you at the e-mail address provided: dh@nsf.gov.

Return

Figure 4 Receipt of Panel Review screen.

Resubmit/Edit a Panel Review

To edit a previously submitted Panel Review, do the following, if before the cutoff date:

1. Access FastLane by pointing your browser to www.fastlane.nsf.gov
2. Click **Panelist Functions**. The **Panelist Functions** screen displays.
3. Log in to the Panelist Functions with the initial log on information provided by your Program Officer (PO). The **Panelist System Selection** screen displays (Figure 1).
4. Locate the **Click to Work On** section (Figure 1).
5. Click **Panel Review System** (Figure 1).

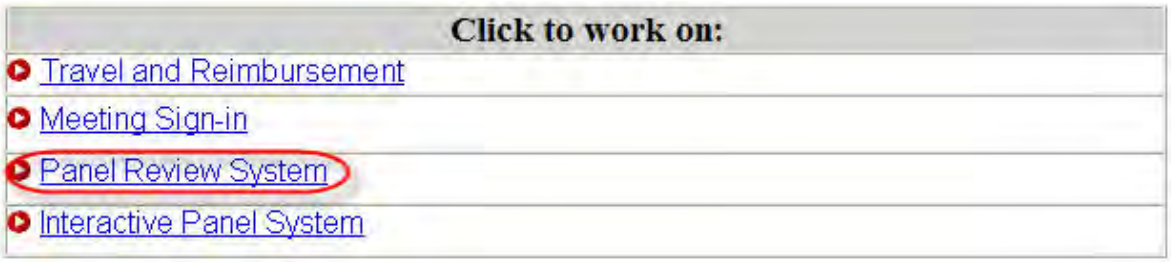


Figure 1 Panel Review System link at the bottom of the Panelist System Selection screen.

6. Click the **Prepare Review** tab is it is not already selected.
7. Select the proposal from the list of proposals that you want to prepare a review for.
8. Click the **Resubmit** button (Figure 2). The **Warning Message** screen displays (Figure 3).

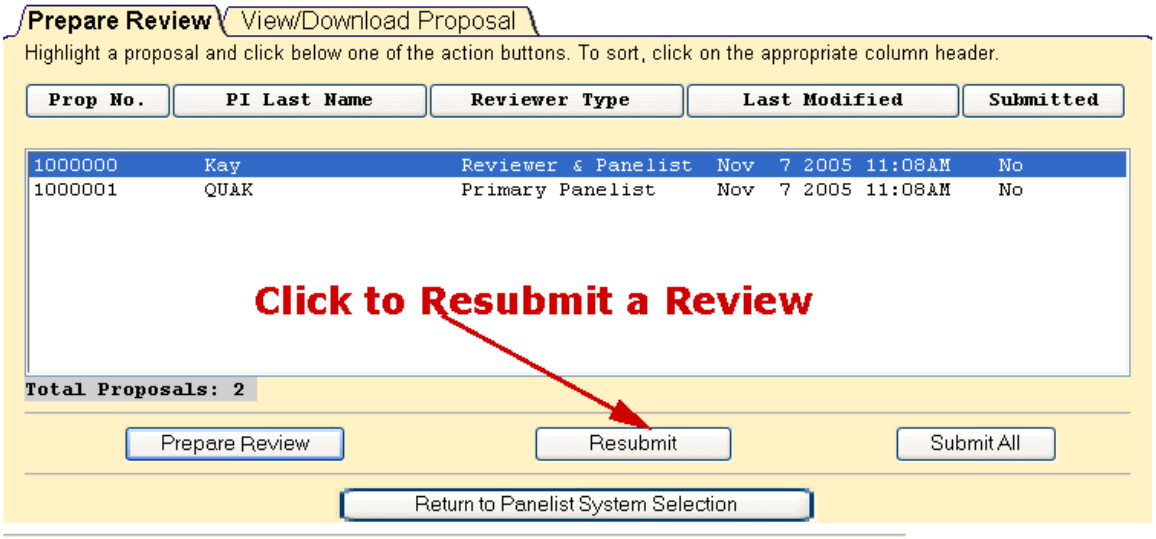
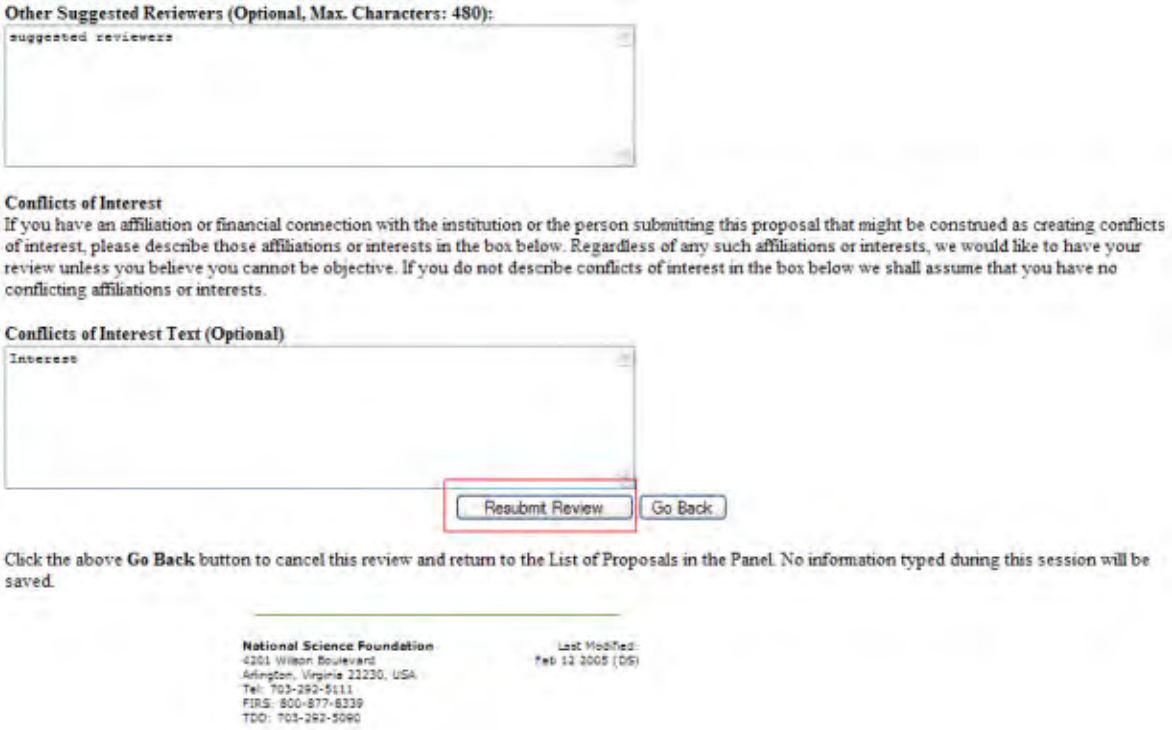


Figure 2 Resubmit Review button on the Prepare Review tabbed page.

9. Click the **Continue** button (Figure 3). The **Panel Review** screen displays (Figure 4).

Figure 3 Warning message screen with message for continuing your review.

10. Make your changes on the **Panel Review** screen (Figure 4).
11. Click the **ReSubmit Review** button (Figure 4). The **Receipt of Panel Review** screen displays.



Other Suggested Reviewers (Optional, Max. Characters: 480):

suggested reviewers

Conflicts of Interest

If you have an affiliation or financial connection with the institution or the person submitting this proposal that might be construed as creating conflicts of interest, please describe those affiliations or interests in the box below. Regardless of any such affiliations or interests, we would like to have your review unless you believe you cannot be objective. If you do not describe conflicts of interest in the box below we shall assume that you have no conflicting affiliations or interests.

Conflicts of Interest Text (Optional)

Interest

Resubmit Review | Go Back

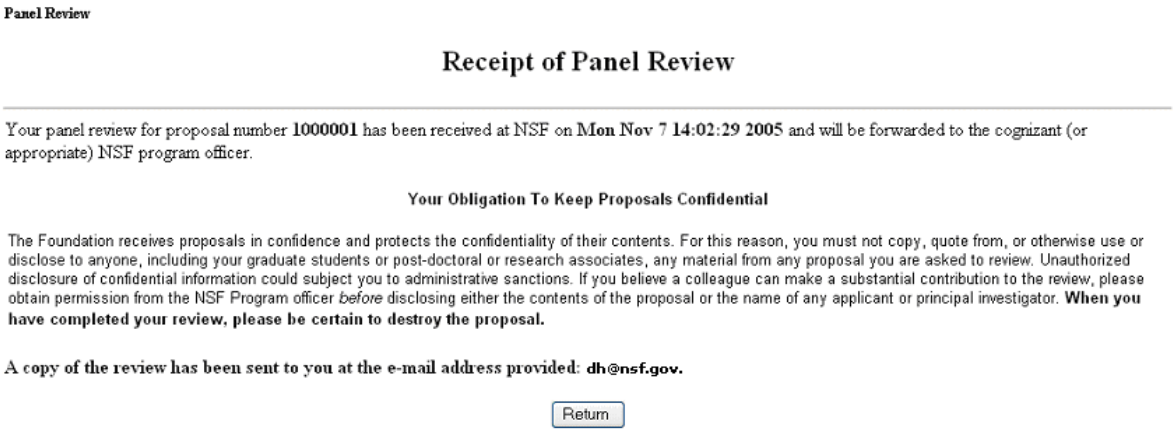
Click the above **Go Back** button to cancel this review and return to the List of Proposals in the Panel. No information typed during this session will be saved.

National Science Foundation
4201 Wilson Boulevard
Arlington, Virginia 22230, USA
Tel: 703-292-5111
FIRS: 800-877-8339
TDD: 703-292-5090

Last Modified:
Feb 12 2005 (DS)

Figure 4 Resubmit Review button on the Panel Review screen.

12. Click the **ReSubmit Review** button (Figure 4). The **Receipt of Panel Review** screen displays.
13. Click the **Return** button (Figure 5).



Panel Review

Receipt of Panel Review

Your panel review for proposal number **1000001** has been received at NSF on **Mon Nov 7 14:02:29 2005** and will be forwarded to the cognizant (or appropriate) NSF program officer.

Your Obligation To Keep Proposals Confidential

The Foundation receives proposals in confidence and protects the confidentiality of their contents. For this reason, you must not copy, quote from, or otherwise use or disclose to anyone, including your graduate students or post-doctoral or research associates, any material from any proposal you are asked to review. Unauthorized disclosure of confidential information could subject you to administrative sanctions. If you believe a colleague can make a substantial contribution to the review, please obtain permission from the NSF Program officer *before* disclosing either the contents of the proposal or the name of any applicant or principal investigator. **When you have completed your review, please be certain to destroy the proposal.**

A copy of the review has been sent to you at the e-mail address provided: dh@nsf.gov.

Return

Figure 5 Receipt of Panel Review screen.

Retrieve a Saved Panel Review

If you have prepared and saved a Panel Review but not submitted it, you retrieve the review for further editing or submission as follows:

1. Access FastLane by pointing your browser to www.fastlane.nsf.gov
2. Click **Panelist Functions**. The **Panelist Functions** screen displays.
3. Log in to the Panelist Functions with the initial log on information provided by your Program Officer (PO). The **Panelist System Selection** screen displays (Figure 1).
4. Locate the **Click to Work On** section (Figure 1).
5. Click **Panel Review System** (Figure 1).

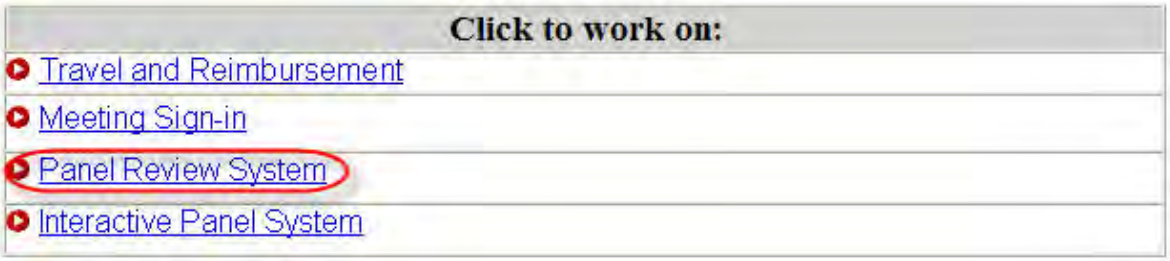


Figure 1 Panel Review System link at the bottom of the Panelist System Selection screen.

6. Click the **Prepare Review** tab is it is not already selected.
7. Select the proposal from the list of proposals that you prepared a review for.
8. Click the **Prepare Review** button (Figure 2). The saved review displays.

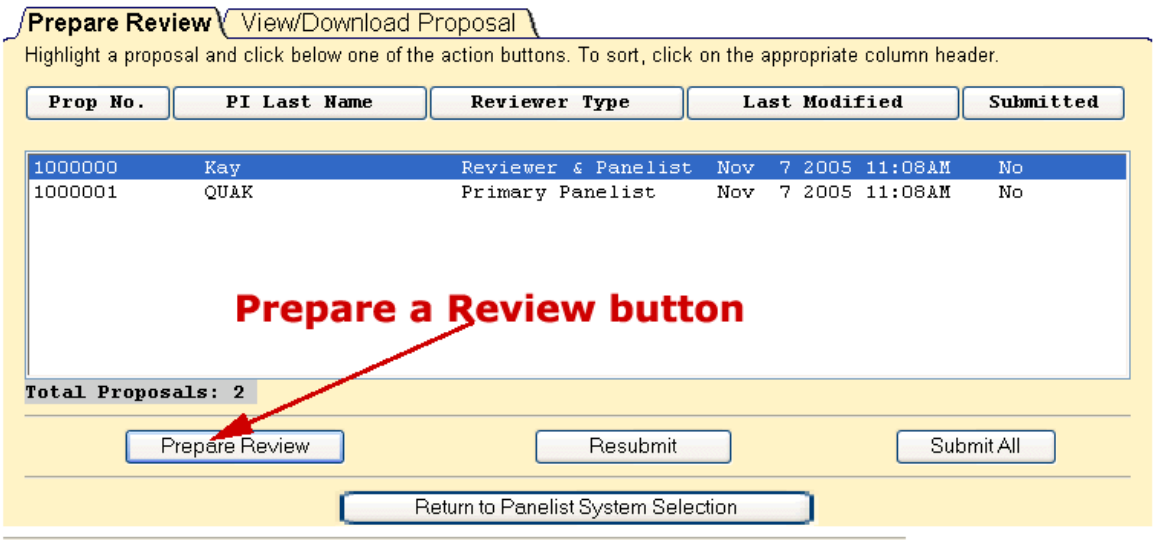


Figure 2 Prepare Review button on the Prepare Review tabbed page.

Interactive Panel System

Interactive Panel System Introduction

Print the contents of the Interactive Panel System book.

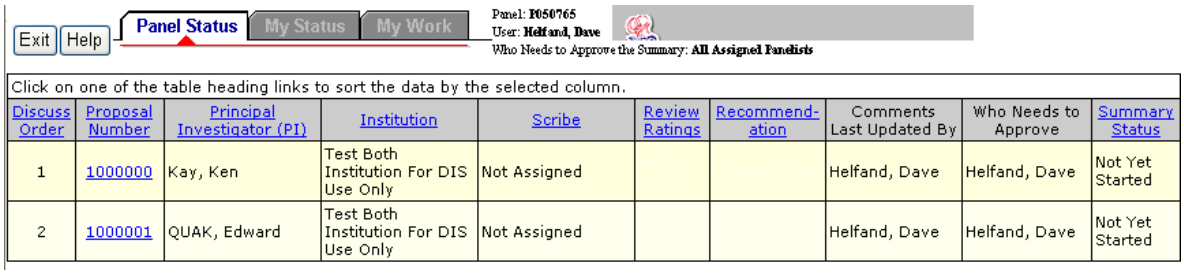
The Interactive Panel System (IPS) is an electronic FastLane system that allows panelists to do the following:

- View a proposal
- Print a proposal
- Write a review comment
- View review comments
- Print review comments
- Prepare reviews
- Prepare recommendations
- Write Panel Summaries
- Review Panel Summaries
- Approve Panel summaries
- Update personal information

IPS Layout

IPS is divided into three tabbed screens:

- **Panel Status** (Figure 1) (Default) - displays basic information on all proposals assigned to the panel as well as a summary of the work done by the entire panel, including individual proposal ratings, panel recommendations, comments, and panel summary status.



Discuss Order	Proposal Number	Principal Investigator (PI)	Institution	Scribe	Review Ratings	Recommend-ation	Comments Last Updated By	Who Needs to Approve	Summary Status
1	1000000	Kay, Ken	Test Both Institution For DIS Use Only	Not Assigned			Helfand, Dave	Helfand, Dave	Not Yet Started
2	1000001	QUAK, Edward	Test Both Institution For DIS Use Only	Not Assigned			Helfand, Dave	Helfand, Dave	Not Yet Started

Figure 1 Panel Status screen.

- **My Status** (Figure 2) - displays basic proposal information for all proposals belonging to the panel, organized by your work state:
  - **Action Required Proposals**: proposals awaiting an action from you (e.g., writing or approving of a panel summary).
  - **No Action Required Proposals:** proposals awaiting an action from another panelist. They will switch to the "Action Required" group if/when your action is needed.
  - **Completed Proposals:** proposals whose required Panel Summary has been approved. If the panel summary changes, these proposals will reappear in the "Action Required" group.
  - **Not Assigned to You**: proposals for which you have no specific responsibilities. However, if you choose, you can submit comments on these proposals.

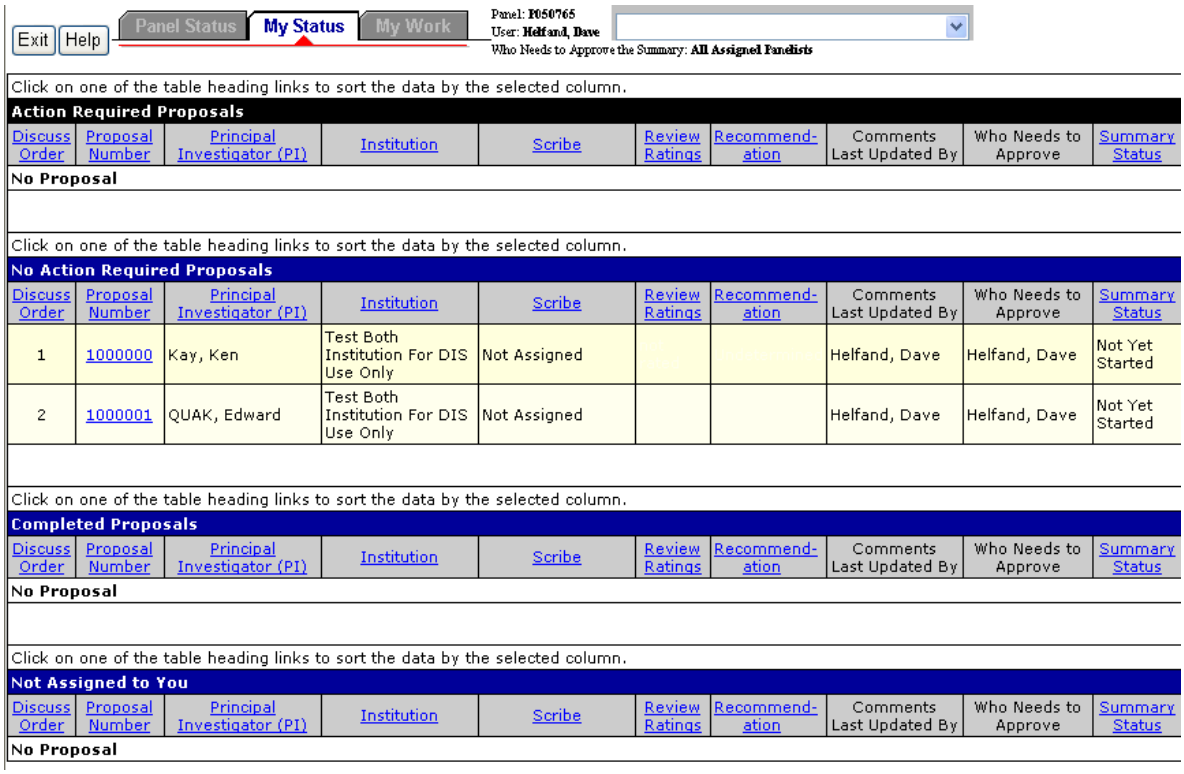


Figure 2 My Status screen.

- **My Work** (Figure 3) - displays your panel review work area.

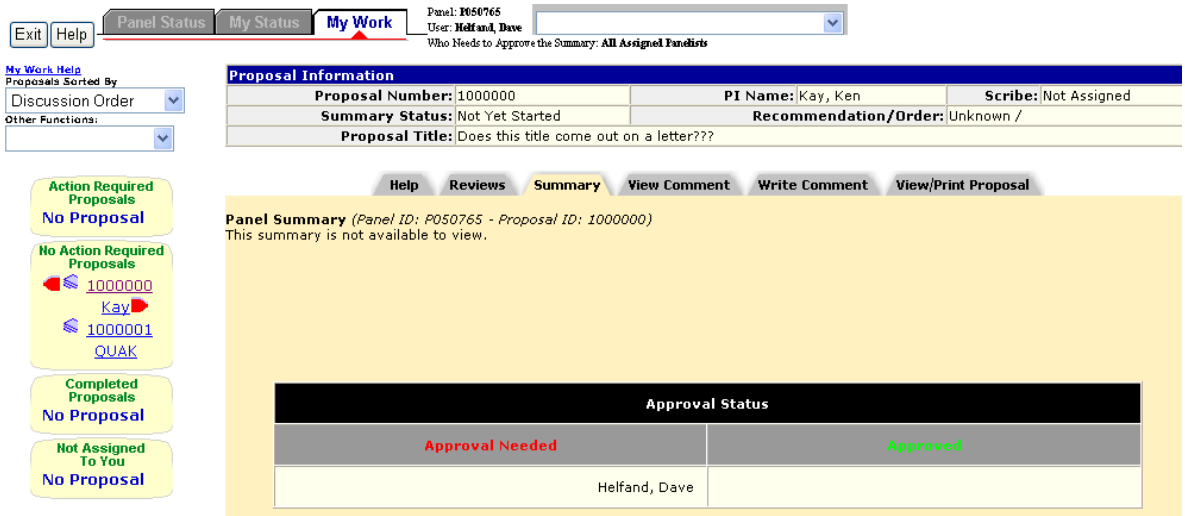


Figure 3 My Work screen.

Roles in the Interactive Panel System

The Program Officer (PO) sets up the panel meeting and has many configuration options. Generally, a panel consists of at least three panelists; and they are divided into the following generally defined roles:

- **Scribe** - the panelist who, in addition to reviewing the proposals, writes the panel's summary of the proposal being reviewed for panel approval
- **Lead Panelist** - the panelist who presents the proposal being reviewed by the panel to the panel
- **Panelist** - panel members with non-administrative functions who review proposals and panel summaries, as well as approve the panel summaries

Interactive Panel System Introduction

Print the contents of the Interactive Panel System book.

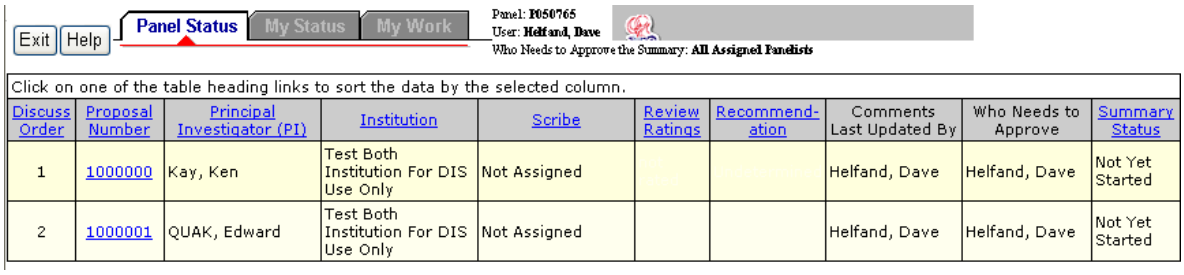
The Interactive Panel System (IPS) is an electronic FastLane system that allows panelists to do the following:

- View a proposal
- Print a proposal
- Write a review comment
- View review comments
- Print review comments
- Prepare reviews
- Prepare recommendations
- Write Panel Summaries
- Review Panel Summaries
- Approve Panel summaries
- Update personal information

IPS Layout

IPS is divided into three tabbed screens:

- **Panel Status** (Figure 1) (Default) - displays basic information on all proposals assigned to the panel as well as a summary of the work done by the entire panel, including individual proposal ratings, panel recommendations, comments, and panel summary status.



Discuss Order	Proposal Number	Principal Investigator (PI)	Institution	Scribe	Review Ratings	Recommend-ation	Comments Last Updated By	Who Needs to Approve	Summary Status
1	1000000	Kay, Ken	Test Both Institution For DIS Use Only	Not Assigned			Helfand, Dave	Helfand, Dave	Not Yet Started
2	1000001	QUAK, Edward	Test Both Institution For DIS Use Only	Not Assigned			Helfand, Dave	Helfand, Dave	Not Yet Started

Figure 1 Panel Status screen.

- **My Status** (Figure 2) - displays basic proposal information for all proposals belonging to the panel, organized by your work state:
  - **Action Required Proposals**: proposals awaiting an action from you (e.g., writing or approving of a panel summary).

- **No Action Required Proposals:** proposals awaiting an action from another panelist. They will switch to the "Action Required" group if/when your action is needed.
- **Completed Proposals:** proposals whose required Panel Summary has been approved. If the panel summary changes, these proposals will reappear in the "Action Required" group.
- **Not Assigned to You**: proposals for which you have no specific responsibilities. However, if you choose, you can submit comments on these proposals.

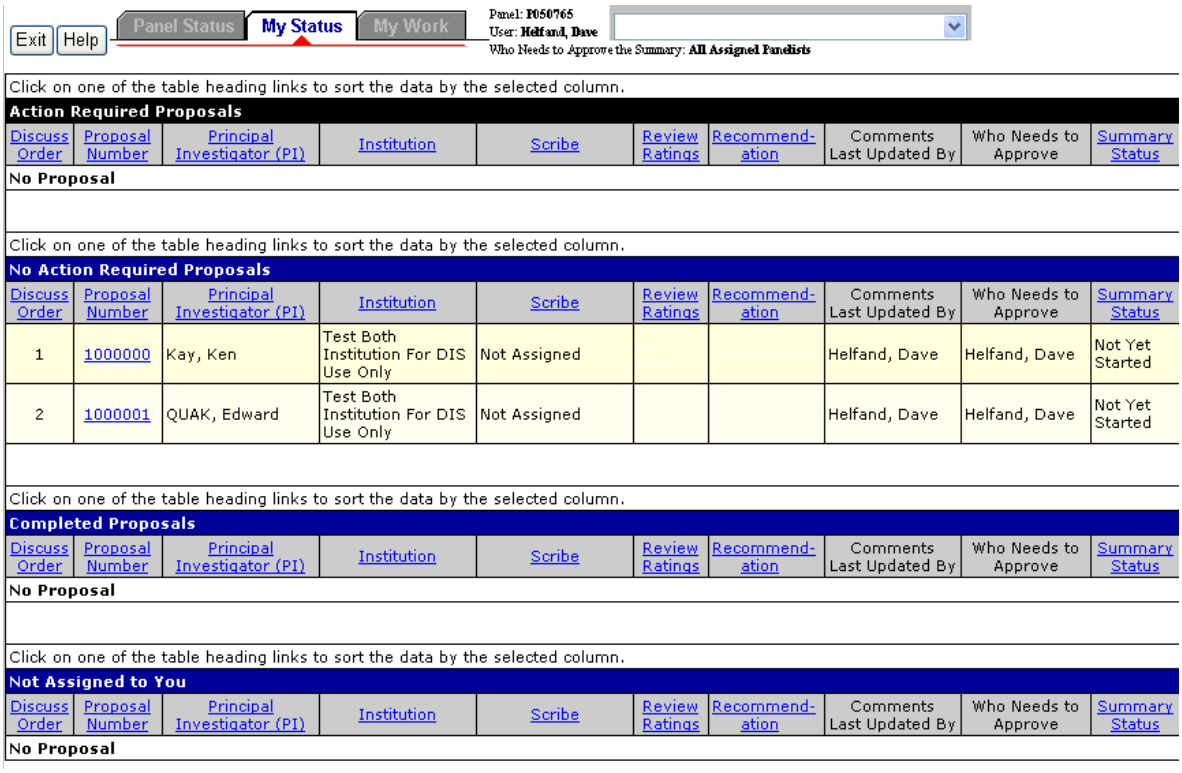


Figure 2 My Status screen.

- **My Work** (Figure 3) - displays your panel review work area.

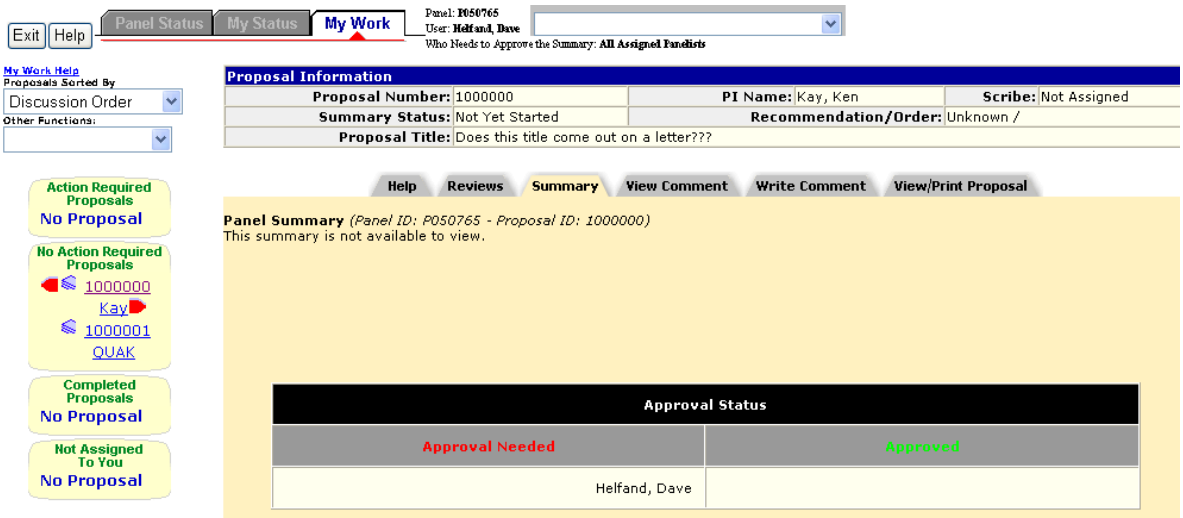


Figure 3 My Work screen.

Roles in the Interactive Panel System

The Program Officer (PO) sets up the panel meeting and has many configuration options. Generally, a panel consists of at least three panelists; and they are divided into the following generally defined roles:

- **Scribe** - the panelist who, in addition to reviewing the proposals, writes the panel's summary of the proposal being reviewed for panel approval
- **Lead Panelist** - the panelist who presents the proposal being reviewed by the panel to the panel
- **Panelist** - panel members with non-administrative functions who review proposals and panel summaries, as well as approve the panel summaries

My Work Screen Overview

Your **My Work** tabbed screen is your work area to create, view, and review proposals, comments, and panel summaries, depending upon your role and the way your Program Officer (PO) set up the panel. Your **My Work** screen is actually modified to display only the functions you can perform; for example, if you are not a scribe you will not see the **Summary** tab as scribes are the panelists who write the Panel Summaries.

My Work Menus

Regardless of your role or the panel settings, you can easily navigating to your proposals with the My Work Menus on the left side of the screen (Figure 1, Section A):

- **Action Required Proposals**
- **No Action Required Proposals**
- **Completed Proposals**
- **Not Assigned to You**

The proposals within each category can be ordered in the following ways:

- **Discussion Order** (as set by the PO)
- **Proposal ID**
- **Summary Status**

with the **Proposals Sorted By** box (**Figure 1, Section C**).

My Work Other Function Boxes

You can quickly perform many of your individual panel duties with the quick access **Other Function** box on the left side of the screen (Figure 1, Section B) :

- **Print Summary** (scribe only)
- **Recommendation**
- **Prepare Reviews**
- **Name/Addr Info**

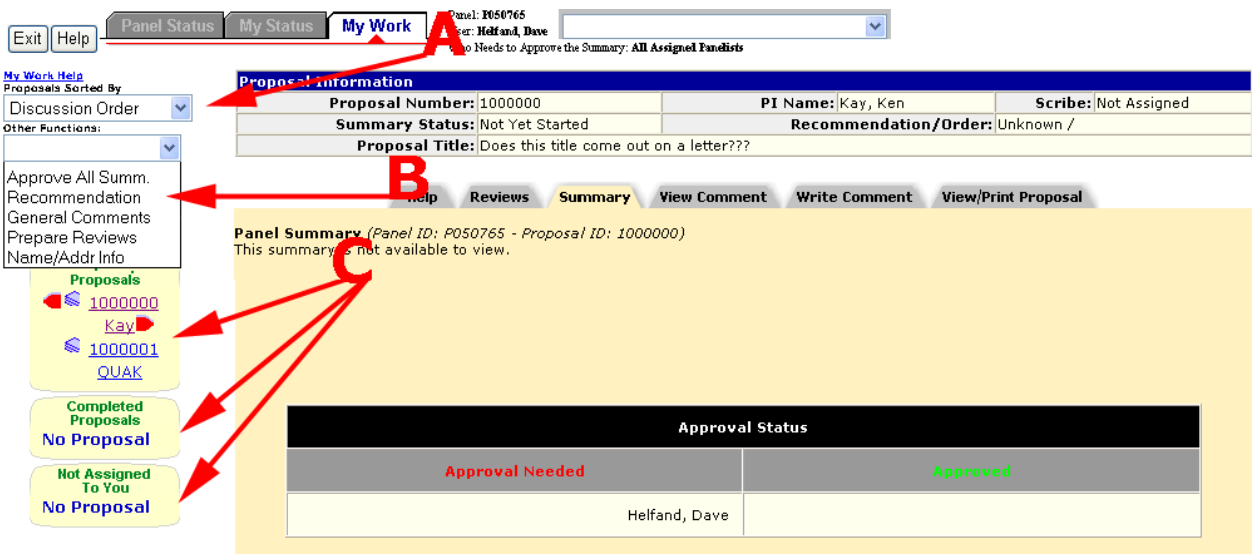


Figure 1 My Work screen layout.

IPS Functions

View a Proposal in IPS

To view a proposal from IPS, do the following:

1. Access FastLane by pointing your browser to www.fastlane.nsf.gov
2. Click **Panelist Functions**. The **Panelist Functions** screen displays.
3. Log in to the Panelist Functions with the initial log on information provided by your Program Officer (PO). The **Panelist System Selection** screen displays.
4. Locate the **Click to Work On** section.
5. Click **Interactive Panel System.**
6. Continue one of the following routes:
   - **Panel Status**
     a. Click the **Panel Status** tab.
     b. Click the proposal number in the Proposal Number column.
     c. Click the **View/Print Proposal** tab.
     d. Click the proposal section you want to print. Or, click **Print Entire Proposal** to print all proposal parts.
     e. Click the **OK** button. Your selection opens in a new window.
   - **My Status**
     a. Click the **My Status** tab.
     b. Click the proposal number in the Proposal Number column.
     c. Click the **View/Print Proposal** tab.

d. Click the proposal section you want to print. Or, click **Print Entire Proposal** to print all proposal parts.
e. Click the **OK** button. Your selection opens in a new window.

- **My Work**
  a. Click the **My Work** tab.
  b. Click the **View / Print Proposal** tab.
  c. Click the proposal section you want to print. Or, click **Print Entire Proposal** to print all proposal parts.
  d. Click the **OK** button. Your selection opens in a new window.

Related Topics:
Proposal Review

Print a Proposal from IPS

To print a proposal from IPS, do the following:

1. Access FastLane by pointing your browser to www.fastlane.nsf.gov
2. Click **Panelist Functions**. The **Panelist Functions** screen displays.
3. Log in to the Panelist Functions with the initial log on information provided by your Program Officer (PO). The **Panelist System Selection** screen displays.
4. Locate the **Click to Work On** section.
5. Click **Interactive Panel System.**
6. Continue one of the following routes:
   - **Panel Status**
     a. Click the **Panel Status** tab.
     b. Click the proposal number in the Proposal Number column.
     c. Click the **View / Print Proposal** tab.
     d. Click the proposal section you want to print. Or, click **Print Entire Proposal** to print all proposal parts.
     e. Click the **OK** button. Your selection opens in a new window.
     f. Click the **Print** button.
   - **My Status**
     a. Click the **My Status** tab.
     b. Click the proposal number in the Proposal Number column.
     c. Click the **View / Print Proposal** tab.
     d. Click the proposal section you want to print. Or, click **Print Entire Proposal** to print all proposal parts.
     e. Click the **OK** button. Your selection opens in a new window.
     f. Click the **Print** button.
   - **My Work**
     a. Click the **My Work** tab.
     b. Click the **View / Print Proposal** tab.
     c. Click the proposal section you want to print. Or, click **Print Entire Proposal** to print all proposal parts.
     d. Click the **OK** button. Your selection opens in a new window.
     e. Click the **Print** button.

Write a Proposal Review/Panel Summary Comment

To write a comment on a proposal in IPS, do the following:

1. Access FastLane by pointing your browser to www.fastlane.nsf.gov
2. Click **Panelist Functions**. The **Panelist Functions** screen displays.

3. Log in to the Panelist Functions with the initial log on information provided by your Program Officer (PO). The **Panelist System Selection** screen displays.
4. Locate the **Click to Work On** section.
5. Click **Interactive Panel System.**
6. Continue one of the following routes:
   - **Panel Status**
     a. Click the **Panel Status** tab.
     b. Click the proposal number in the Proposal Number column.
     c. Click the **Write Comment** tab.
     d. Type your comment text in the **Write Comment** box.
     e. (Optional) Click the **Check Spelling** button to check your spelling.
     f. Click the **Submit Comment** button to submit your comment. Or, click the **Save Comment** button to save the comment text but not submit the comment.
   - **My Status**
     a. Click the **My Status** tab.
     b. Click the proposal number in the Proposal Number column.
     c. Click the **Write Comment** tab.
     d. Type your comment text in the **Write Comment** box.
     e. (Optional) Click the **Check Spelling** button to check your spelling.
     f. Click the **Submit Comment** button to submit your comment. Or, click the **Save Comment** button to save the comment text but not submit the comment.
   - **My Work**
     a. Click the **My Work** tab.
     b. Click the **Write Comment** tab.
     c. Type your comment text in the **Write Comment** box.
     d. (Optional) Click the **Check Spelling** button to check your spelling.
     e. Click the **Submit Comment** button to submit your comment. Or, click the **Save Comment** button to save the comment text but not submit the comment.

See also Proposal Review.

Print Proposal Review Comments

To view all panelists' comments on a proposal, do the following:

1. Access FastLane by pointing your browser to www.fastlane.nsf.gov
2. Click **Panelist Functions**. The **Panelist Functions** screen displays.
3. Log in to the Panelist Functions with the initial log on information provided by your Program Officer (PO). The **Panelist System Selection** screen displays.
4. Locate the **Click to Work On** section.
5. Click **Interactive Panel System.**
6. Continue one of the following routes:
   - **Panel Status**
     a. Click the **Panel Status** tab.
     b. Click the proposal number in the **Proposal Number** column.
     c. Click the **View Comment** tab.
     d. Click the **Print Comments** button.
     e. Click the **Print** button.
   - **My Status**
     a. Click the **My Status** tab.
     b. Click the proposal number in the **Proposal Number** column.

c. Click the **View Comment** tab.
d. Click the **Print Comments** button.
e. Click the **Print** button.

- **My Work**
  a. Click the **My Work** tab.
  b. Click the **View Comment** tab.
  c. Click the **Print Comments** button.
  d. Click the **Print** button.

View a Proposal Review/Panel Summary Comment

To view all panelists' comments on a proposal, do the following:

1. Access FastLane by pointing your browser to www.fastlane.nsf.gov
2. Click **Panelist Functions**. The **Panelist Functions** screen displays.
3. Log in to the Panelist Functions with the initial log on information provided by your Program Officer (PO). The **Panelist System Selection** screen displays.
4. Locate the **Click to Work On** section.
5. Click **Interactive Panel System.**
6. Continue one of the following routes:
   - **Panel Status**
     a. Click the **Panel Status** tab.
     b. Click the proposal number in the **Proposal Number** column.
     c. Click the **View Comment** tab.
     d. Click the **Refresh** button. The comments are listed in descending chronological order in the **Comments** box.
   - **My Status**
     a. Click the **My Status** tab.
     b. Click the proposal number in the **Proposal Number** column.
     c. Click the **View Comment** tab.
     d. Click the **Refresh** button. The comments are listed in descending chronological order in the **Comments** box.
   - **My Work**
     a. Click the **My Work** tab.
     b. Click the **View Comment** tab.
     c. Click the **Refresh** button. The comments are listed in descending chronological order in the **Comments** box.

Note: While viewing the **Comments** tabbed screen for long periods of time, you can click the Refresh button to update the **Comments** box with the comments as they are written and submitted.

Prepare a Panel Review from IPS

To complete your proposal panel review from IPS, do the following:

1. Access FastLane by pointing your browser to www.fastlane.nsf.gov
2. Click **Panelist Functions**. The **Panelist Functions** screen displays.
3. Log in to the Panelist Functions with the initial log on information provided by your Program Officer (PO). The **Panelist System Selection** screen displays.
4. Locate the **Click to Work On** section.
5. Click **Interactive Panel System.**
6. Continue one of the following routes:
   - **Panel Status**
     a. Click the **Panel Status** tab.
     b. Click the proposal number in the **Proposal Number** column.

c. Select **Prepare Reviews** from the **Other Functions** box. The **Panel Review System (PRS)** opens in a new window.
d. Follow the PRS instructions on completing a review.

- **My Status**
  a. Click the **My Status** tab.
  b. Click the proposal number in the **Proposal Number** column.
  c. Select **Prepare Reviews** from the **Other Functions** box. The **Panel Review System (PRS)** opens in a new window.
  d. Follow the PRS instructions on completing a review.
- **My Work**
  a. Click the **My Work** tab.
  b. Select **Prepare Reviews** from the **Other Functions** box. The **Panel Review System (PRS)** opens in a new window.
  c. Follow the PRS instructions on completing a review.

See also:
Proposal Review

View Other Panelists' Proposal Reviews

After submitting your own proposal review, and your PO setting up the panel in this manner, you can view other panelists' proposal reviews as follows:

1. Access FastLane by pointing your browser to www.fastlane.nsf.gov
2. Click **Panelist Functions**. The **Panelist Functions** screen displays.
3. Log in to the Panelist Functions with the initial log on information provided by your Program Officer (PO). The **Panelist System Selection** screen displays.
4. Locate the **Click to Work On** section.
5. Click **Interactive Panel System.**
6. Continue one of the following routes:
   - **Panel Status**
     a. Click the **Panel Status** tab.
     b. Click the proposal number in the **Proposal Number** column.
     c. Click the **Reviews** tab.
   - **My Status**
     a. Click the **My Status** tab.
     b. Click the proposal number in the **Proposal Number** column.
     c. Click the **Reviews** tab.
   - **My Work**
     a. Click the **My Work** tab.
     b. Click the **Reviews** tab.

Prepare a Recommendation

If the PO has granted you permission, you can provide other panelists recommendations on the proposal being reviewed as follows:

1. Access FastLane by pointing your browser to www.fastlane.nsf.gov
2. Click **Panelist Functions**. The **Panelist Functions** screen displays.
3. Log in to the Panelist Functions with the initial log on information provided by your Program Officer (PO). The **Panelist System Selection** screen displays.
4. Locate the **Click to Work On** section.
5. Click **Interactive Panel System.**
6. Continue one of the following routes:
   - **Panel Status**
     a. Click the **Panel Status** tab.

b. Click the proposal number in the **Proposal Number** column.
c. Select **Recommendations** from the **Other Functions** box.
d. Select the recommendation from the drop-down box in the Recommendation column.
e. Click the **Save Recommendations** button.

- **My Status**
  a. Click the **My Status** tab.
  b. Click the proposal number in the **Proposal Number** column.
  c. Select **Recommendations** from the **Other Functions** box.
  d. Select the recommendation from the drop-down box in the Recommendation column.
  e. Click the **Save Recommendations** button.
- **My Work**
  a. Click the **My Work** tab.
  b. Select **Recommendations** from the **Other Functions** box.
  c. Select the recommendation from the drop-down box in the Recommendation column.
  d. Click the **Save Recommendations** button.

Note: Your Program Officer may prefer that you order the proposals instead of making recommendations; if so, you will use the **Ordering** column drop-down box instead of the **Recommendations** column drop-down box. Your Program Officer will provide instructions on what actions to take.

Write a Panel Summary

If you are a Scribe, you can create a Panel Summary as follows:

1. Access FastLane by pointing your browser to www.fastlane.nsf.gov
2. Click **Panelist Functions**. The **Panelist Functions** screen displays.
3. Log in to the Panelist Functions with the initial log on information provided by your Program Officer (PO). The **Panelist System Selection** screen displays.
4. Locate the **Click to Work On** section.
5. Click **Interactive Panel System.**
6. Continue one of the following routes:
   - **Panel Status**
     a. Click the **Panel Status** tab.
     b. Click the proposal number in the **Proposal Number** column.
     c. Select **Summary** tab.
     d. Type your Panel Summary text in the text box.
     e. Click the **Save** button.
   - **My Status**
     a. Click the **My Status** tab.
     b. Click the proposal number in the **Proposal Number** column.
     c. Select **Summary** tab.
     d. Type your Panel Summary text in the text box.
     e. Click the **Save** button.
   - **My Work**
     a. Click the **My Work** tab.
     b. Select **Summary** tab.
     c. Type your Panel Summary text in the text box.
     d. Click the **Save** button.

See also Proposal Review.

Submit a Panel Summary for Comment

If you are a Scribe and have a draft saved, you can release the Panel Summary draft to the panel for comments as follows:

1. Access FastLane by pointing your browser to www.fastlane.nsf.gov
2. Click **Panelist Functions**. The **Panelist Functions** screen displays.
3. Log in to the Panelist Functions with the initial log on information provided by your Program Officer (PO). The **Panelist System Selection** screen displays.
4. Locate the **Click to Work On** section.
5. Click **Interactive Panel System.**
6. Continue one of the following routes:
   - **Panel Status**
     a. Click the **Panel Status** tab.
     b. Click the proposal number in the **Proposal Number** column.
     c. Select **Summary** tab.
     d. Click the **Submit Draft for Comment** comment.
   - **My Status**
     a. Click the **My Status** tab.
     b. Click the proposal number in the **Proposal Number** column.
     c. Select **Summary** tab.
     d. Click the **Submit Draft for Comment** comment.
   - **My Work**
     a. Click the **My Work** tab.
     b. Select **Summary** tab.
     c. Click the **Submit Draft for Comment** comment.

View a Panel Summary

If your Scribe has released the Panel Summary for comments or final approval, you can view the summary as follows:

1. Access FastLane by pointing your browser to www.fastlane.nsf.gov
2. Click **Panelist Functions**. The **Panelist Functions** screen displays.
3. Log in to the Panelist Functions with the initial log on information provided by your Program Officer (PO). The **Panelist System Selection** screen displays.
4. Locate the **Click to Work On** section.
5. Click **Interactive Panel System.**
6. Continue one of the following routes:
   - **Panel Status**
     a. Click the **Panel Status** tab.
     b. Click the proposal number in the **Proposal Number** column.
     c. Select **Summary** tab. The Panel Summary displays.
   - **My Status**
     a. Click the **My Status** tab.
     b. Click the proposal number in the **Proposal Number** column.
     c. Select **Summary** tab. The Panel Summary displays.
   - **My Work**
     a. Click the **My Work** tab.
     b. Select **Summary** tab. The Panel Summary displays.

Submit a Panel Summary for Final Approval

If you are a Scribe and have a draft saved or have received comments from the panel on your panel summary draft, you can release the Panel Summary to the panel for final approval as follows:

1. Access FastLane by pointing your browser to www.fastlane.nsf.gov
2. Click **Panelist Functions**. The **Panelist Functions** screen displays.
3. Log in to the Panelist Functions with the initial log on information provided by your Program Officer (PO). The **Panelist System Selection** screen displays.
4. Locate the **Click to Work On** section.
5. Click **Interactive Panel System.**
6. Continue one of the following routes:
   - **Panel Status**
     a. Click the **Panel Status** tab.
     b. Click the proposal number in the **Proposal Number** column.
     c. Select **Summary** tab.
     d. Click the **Submit Draft for Final Approval** comment.
   - **My Status**
     a. Click the **My Status** tab.
     b. Click the proposal number in the **Proposal Number** column.
     c. Select **Summary** tab.
     d. Click the **Submit Draft for Final Approval** comment.
   - **My Work**
     a. Click the **My Work** tab.
     b. Select **Summary** tab.
     c. Click the **Submit Draft for Final Approval** comment.

Approve a Panel Summary

If the panel Scribe has made the Panel Summary available for review or final approval, you can approve the summary, if required, in one of the following three ways:

Method 1 - From the Summary Tab

1. Access FastLane by pointing your browser to www.fastlane.nsf.gov
2. Click **Panelist Functions**. The **Panelist Functions** screen displays.
3. Log in to the Panelist Functions with the initial log on information provided by your Program Officer (PO). The **Panelist System Selection** screen displays.
4. Locate the **Click to Work On** section.
5. Click **Interactive Panel System.**
6. Continue one of the following routes:
   - **Panel Status**
     a. Click the **Panel Status** tab.
     b. Click the proposal number in the **Proposal Number** column.
     c. Select the **Summary** tab.
     d. Note your name in the **Approval Needed** list.
     e. Click the **Approve** button.
   - **My Status**
     a. Click the **My Status** tab.
     b. Click the proposal number in the **Proposal Number** column.
     c. Select the **Summary** tab.
     d. Note your name in the **Approval Needed** list.
     e. Click the **Approve** button.
   - **My Work**
     a. Click the **My Work** tab.
     b. Select the **Summary** tab.

c. Note your name in the **Approval Needed** list.
d. Click the **Approve** button.

Method 2 - From the Other Functions

1. Access FastLane by pointing your browser to www.fastlane.nsf.gov
2. Click **Panelist Functions**. The **Panelist Functions** screen displays.
3. Log in to the Panelist Functions with the initial log on information provided by your Program Officer (PO). The **Panelist System Selection** screen displays.
4. Locate the **Click to Work On** section.
5. Click **Interactive Panel System.**
6. Continue one of the following routes:
   - **Panel Status**
     a. Click the **Panel Status** tab.
     b. Click the proposal number in the **Proposal Number** column.
     c. Select the **Approve All Summ.** in the **Other Functions** box.
     c. Select the proposal(s) you want to approve a panel summary for.
     d. Click the **Approve Selection** button.
   - **My Status**
     a. Click the **My Status** tab.
     b. Click the proposal number in the **Proposal Number** column.
     c. Select the **Approve All Summ.** in the **Other Functions** box.
     c. Select the proposal(s) you want to approve a panel summary for.
     d. Click the **Approve Selection** button.
   - **My Work**
     a. Click the **My Work** tab.
     b. Select the **Approve All Summ.** in the **Other Functions** box.
     c. Select the proposal(s) you want to approve a panel summary for.
     d. Click the **Approve Selection** button.

Method 3 - From the Other Functions Tab (Approving All Summaries)

1. Access FastLane by pointing your browser to www.fastlane.nsf.gov
2. Click **Panelist Functions**. The **Panelist Functions** screen displays.
3. Log in to the Panelist Functions with the initial log on information provided by your Program Officer (PO). The **Panelist System Selection** screen displays.
4. Locate the **Click to Work On** section.
5. Click **Interactive Panel System.**
6. Continue one of the following routes:
   - **Panel Status**
     a. Click the **Panel Status** tab.
     b. Click the proposal number in the **Proposal Number** column.
     c. Select the **Approve All Summ.** in the **Other Functions** box.
     d. Click the **Approve All** button.
   - **My Status**
     a. Click the **My Status** tab.
     b. Click the proposal number in the **Proposal Number** column.
     c. Select the **Approve All Summ.** in the **Other Functions** box.
     d. Click the **Approve All** button.
   - **My Work**
     a. Click the **My Work** tab.
     b. Select the **Approve All Summ.** in the **Other Functions** box.
     c. Click the **Approve All** button.

See also Proposal Review.

Print a Panel Summary

If you are a Scribe, you can print out a Panel Summary as follows:

1. Access FastLane by pointing your browser to www.fastlane.nsf.gov
2. Click **Panelist Functions**. The **Panelist Functions** screen displays.
3. Log in to the Panelist Functions with the initial log on information provided by your Program Officer (PO). The **Panelist System Selection** screen displays.
4. Locate the **Click to Work On** section.
5. Click **Interactive Panel System.**
6. Continue one of the following routes:
   - **Panel Status**
     a. Click the **Panel Status** tab.
     b. Click the proposal number in the **Proposal Number** column.
     c. Select **Summary** tab.
     d. Click the **Print** button.
   - **My Status**
     a. Click the **My Status** tab.
     b. Click the proposal number in the **Proposal Number** column.
     c. Select **Summary** tab.
     d. Click the **Print** button.
   - **My Work**
     a. Click the **My Work** tab.
     b. Select **Summary** tab.
     c. Click the **Print** button.

Update Personal Information in IPS

After accepting to be a part of your first panel, the following demographic information that you provided to the National Science Foundation (NSF) is stored in FastLane:

- Race
- Ethnicity
- Citizenship
- Gender
- Disability

You can update your personal information from IPS as follows:

1. Access FastLane by pointing your browser to www.fastlane.nsf.gov
2. Click **Panelist Functions**. The **Panelist Functions** screen displays.
3. Log in to the Panelist Functions with the initial log on information provided by your Program Officer (PO). The **Panelist System Selection** screen displays.
4. Locate the **Click to Work On** section.
5. Click **Interactive Panel System.**
6. Continue one of the following routes:
   - **Panel Status**
     a. Click the **Panel Status** tab.
     b. Click the proposal number in the **Proposal Number** column.
     c. Select **Name/Addr Info** from the **Other Functions** box. The PRS **Reviewer's Information** screen opens in another window.
     d. Complete the PRS instructions for Changing Your Personal Information to finish changes to your personal information from IPS.
   - **My Status**

a. Click the **My Status** tab.
b. Click the proposal number in the **Proposal Number** column.
c. Select **Name/Addr Info** from the **Other Functions** box. The PRS **Reviewer's Information** screen opens in another window.
d. Complete the PRS instructions for Changing Your Personal Information to finish changes to your personal information from IPS.

- **My Work**
  a. Click the **My Work** tab.
  b. Select **Name/Addr Info** from the **Other Functions** box. The PRS **Reviewer's Information** screen opens in another window.
  c. Complete the PRS instructions for Changing Your Personal Information to finish changes to your personal information from IPS.

Interact with the Panel

The Interactive Panel System (IPS) is designed for real-time proposal reviewing. While logged in, you can be notified when another panelist has performed a action (e.g., posted a comment) as follows:

1. Access FastLane by pointing your browser to www.fastlane.nsf.gov
2. Click **Panelist Functions**. The **Panelist Functions** screen displays.
3. Log in to the Panelist Functions with the initial log on information provided by your Program Officer (PO). The **Panelist System Selection** screen displays.
4. Locate the **Click to Work On** section.
5. Click **Interactive Panel System.**
6. Continue one of the following routes:
   - **Panel Status**
     a. Click the **Panel Status** tab.
     b. When the History box flashes, expand it to see a History of panelist actions.
   - **My Status**
     a. Click the **My Status** tab.
     b. When the **History** box flashes, expand it to see a History of panelist actions.
   - **My Work**
     a. Click the **My Work** tab.
     b. When the **History** box flashes, expand it to see a History of panelist actions.

Provide Feedback on IPS

You can provide the National Science Foundation (NSF) feedback on IPS as follows:

1. Access FastLane by pointing your browser to www.fastlane.nsf.gov
2. Click **Panelist Functions**. The **Panelist Functions** screen displays.
3. Log in to the Panelist Functions with the initial log on information provided by your Program Officer (PO). The **Panelist System Selection** screen displays.
4. Locate the **Click to Work On** section.
5. Click **Interactive Panel System.**
6. Continue one of the following routes:
   - **Panel Status**
     a. Click the **Panel Status** tab.
     b. Click the proposal number in the **Proposal Number** column.
     c. Select **General Comments** from the **Other Functions** box.
     d. Type your comments in the box.
     e. Select the **Yes** radio button.
     f. Click the **Save** button.
     g. Click the **OK** button from the confirmation box.

- **My Status**
  a. Click the **My Status** tab.
  b. Click the proposal number in the **Proposal Number** column.
  c. Select **General Comments** from the **Other Functions** box.
  d. Type your comments in the box.
  e. Select the **Yes** radio button.
  f. Click the **Save** button.
  g. Click the **OK** button from the confirmation box.
- **My Work**
  a. Click the **My Work** tab.
  b. Select **General Comments** from the **Other Functions** box.
  c. Type your comments in the box.
  d. Select the **Yes** radio button.
  e. Click the **Save** button.
  f. Click the **OK** button from the confirmation box.

Honorary Awards

Honorary Awards Introduction

Print the contents of the Honorary Awards book.

In the Honorary Awards module, researchers can submit nominations and references/letters of support for nominees for the following NSF awards:

- Alan T. Waterman Award: An annual award that recognizes an outstanding young researcher in any field of science or engineering supported by the National Science Foundation
- National Medal of Science: A Presidential award bestowed on individuals "deserving of special recognition by reason of their outstanding contributions to knowledge in the physical, biological, mathematical, engineering, or social and behavioral sciences." NSF manages this award on behalf of the White House.
- Vannevar Bush Award: An annual award that recognizes an individual who, through public service activities in science and technology, has made an outstanding "contribution toward the welfare of mankind and the nation"
- National Science Board Public Service Award: An annual award that recognizes people and organizations who have increased the public understanding of science or engineering

The Alan T. Waterman Award, the National Medal of Science and the Vannevar Bush Award require references. When you prepare a nomination for any of these awards, you are required to indicate the names and contact information for the individuals who will submit a reference on behalf of your nominee. As a nominator you are responsible for ensuring that your suggested references submit their information in a timely manner.

Nomination for the National Medal of Science, the Vannevar Bush and the National Science Board Public Service award meriting final consideration may be carried over for a period of 3 years, including the year of nomination. After that time, you may renominate the candidate for later consideration, if he or she is still eligible. For the Alan T. Waterman award, only nominations classified as “Top Performer” are carried over an additional year. For questions regarding eligibility for the Alan T. Waterman award, please contact the Honorary Awards Specialist listed for the award.

After you have submitted a nomination, you cannot change it through FastLane. You must contact the Honorary Awards Specialist listed for the award.

Honorary Awards Introduction

Print the contents of the Honorary Awards book.

In the Honorary Awards module, researchers can submit nominations and references/letters of support for nominees for the following NSF awards:

- Alan T. Waterman Award: An annual award that recognizes an outstanding young researcher in any field of science or engineering supported by the National Science Foundation
- National Medal of Science: A Presidential award bestowed on individuals "deserving of special recognition by reason of their outstanding contributions to knowledge in the physical, biological, mathematical, engineering, or social and behavioral sciences." NSF manages this award on behalf of the White House.
- Vannevar Bush Award: An annual award that recognizes an individual who, through public service activities in science and technology, has made an outstanding "contribution toward the welfare of mankind and the nation"
- National Science Board Public Service Award: An annual award that recognizes people and organizations who have increased the public understanding of science or engineering

The Alan T. Waterman Award, the National Medal of Science and the Vannevar Bush Award require references. When you prepare a nomination for any of these awards, you are required to indicate the names and contact information for the individuals who will submit a reference on behalf of your nominee. As a nominator you are responsible for ensuring that your suggested references submit their information in a timely manner.

Nomination for the National Medal of Science, the Vannevar Bush and the National Science Board Public Service award meriting final consideration may be carried over for a period of 3 years, including the year of nomination. After that time, you may renominate the candidate for later consideration, if he or she is still eligible. For the Alan T. Waterman award, only nominations classified as “Top Performer” are carried over an additional year. For questions regarding eligibility for the Alan T. Waterman award, please contact the Honorary Awards Specialist listed for the award.

After you have submitted a nomination, you cannot change it through FastLane. You must contact the Honorary Awards Specialist listed for the award.

Register for Honorary Awards

1. On the **FastLane Home Page** screen (Figure 1), click **Honorary Awards**. The **Honorary Awards** screen displays (Figure 2).

Figure 1 FastLane Home Page screen. The Honorary Awards link is circled.

Figure 2 Honorary Awards screen. The Register Here link and the register and create your Honorary Awards user account link is circled.

2. To create an account, click on **Register Here** or the **register and create an Honorary Awards user account** link. (Figure 2). The **Rules of Behavior** screen displays (Figure 3).

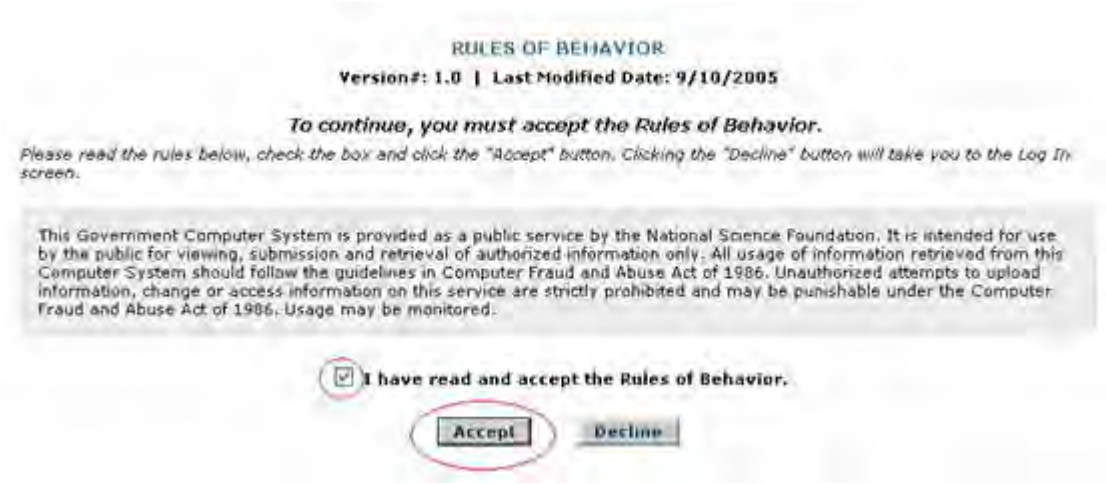


Figure 3 Rules of Behavior screen. The check mark box and the Accept button are circled.

3. Read the **Rules of Behavior** (Figure 3).
4. Click the check mark box for **Accept** (Figure 3) to accept the Rules of Behavior (You cannot continue to register if you do not accept).
5. Click the **Accept** button (Figure 3). The **Register User** screen displays (Figure 4). On the **Register User** screen (Figure 4), enter the following information in the appropriate boxes:
    - First name
    - Last name
    - Address
    - City
    - Zip code (optional)
    - State
    - Country
    - International postal code (optional)
    - Email
    - Phone number
    - Fax number (optional)
    - Organization
    - User Name
    - Password (see Password Requirements)
    - Confirm password—Retype your password.

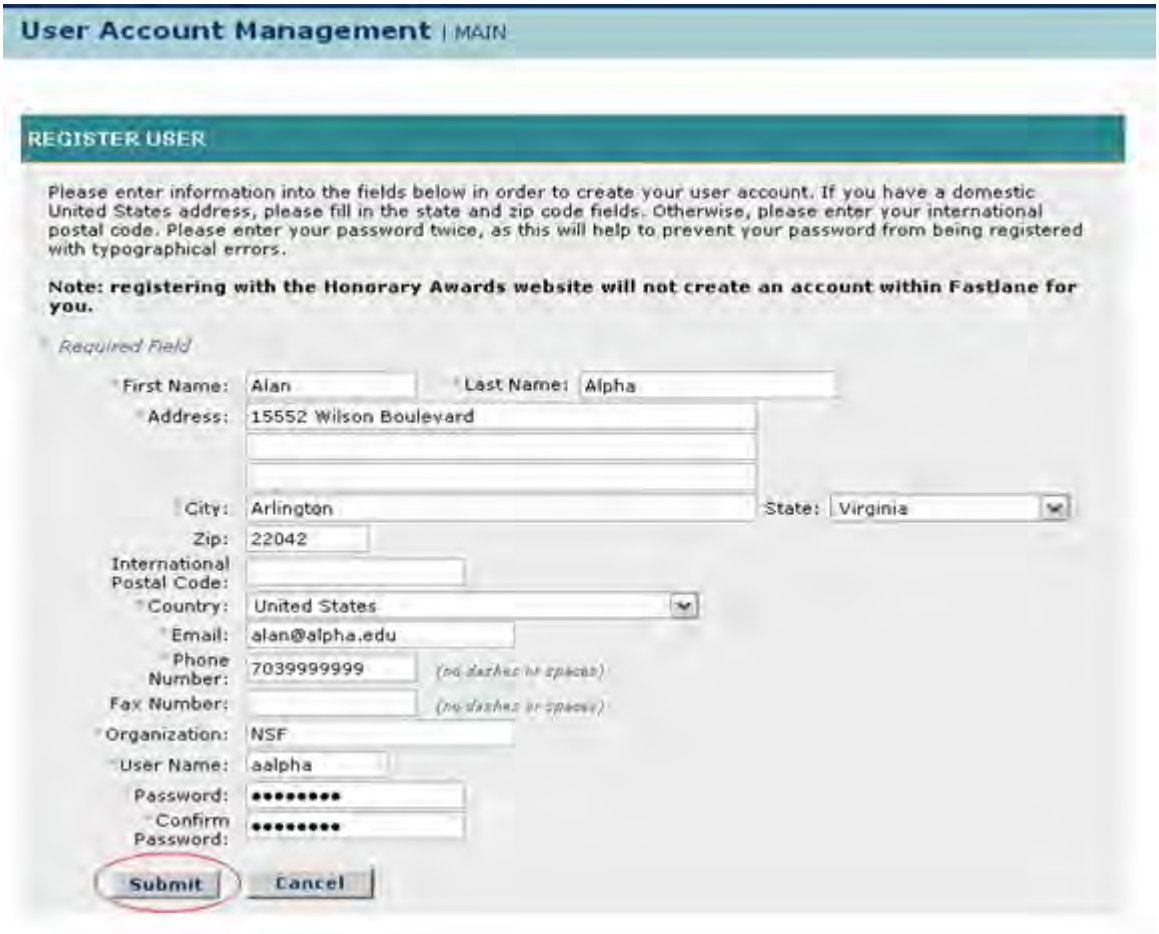


Figure 4 Register User screen. The Submit button is circled.

6. Click the **Submit** button (Figure 4). The **Confirm Register User** screen displays (Figure 5).

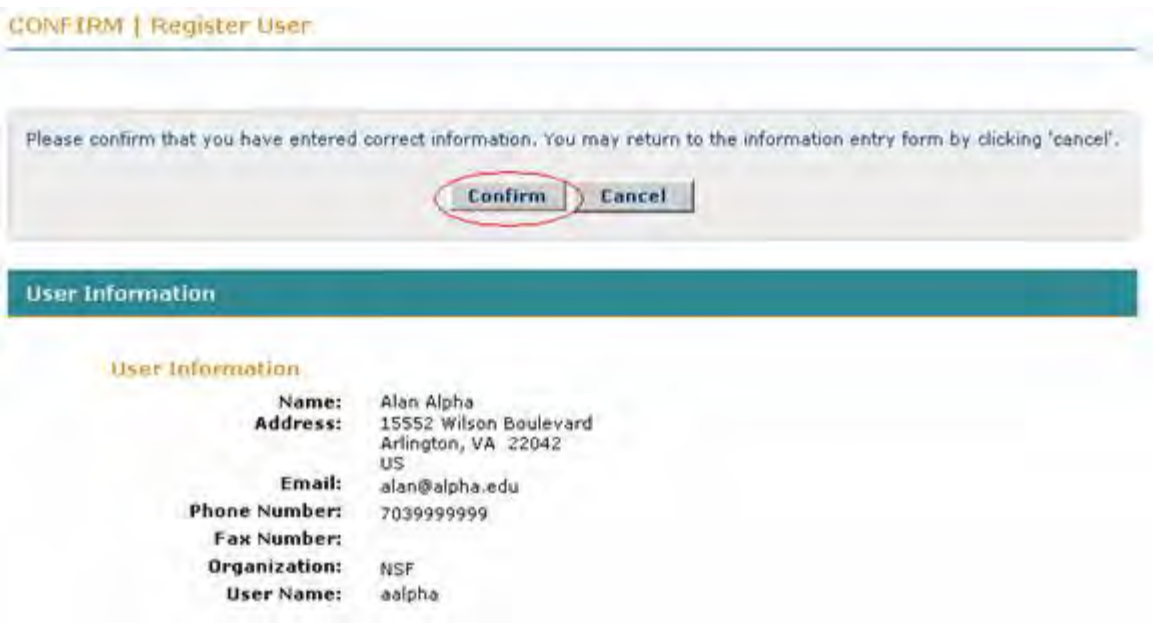


Figure 5 Confirm Register User screen. The Confirm button is circled.

7. Click the **Confirm** button (Figure 5). The **Confirmation** screen displays (Figure 6).

Figure 6 Confirmation screen.

8. Click **Back to Main** (Figure 6). The **Honorary Awards** screen displays (Figure 7). You can now begin to nominate an individual or to write a reference for an individual for one of the four awards.

Figure 7 Honorary Awards screen.

Log In to Honorary Awards

To log in, you must be registered for Honorary Awards. See Register for Honorary Awards.

1. On the **FastLane Home Page** screen (Figure 1), click **Honorary Awards**. The **Honorary Awards Login** screen displays (Figure 2).

Figure 1 FastLane Home Page screen. The Honorary Awards link is circled.

Figure 2 Honorary Awards Login screen. The Log In button is circled.

2. In the **Login** section (Figure 2), type the following in the boxes provided:
3. **User name** (which you assigned to yourself when you registered)
4. **Password** (which you set when you registered)
5. Click the **Login** button (Figure 2). The **Honorary Awards** screen displays (Figure 3). You have options to submit nominations for the following awards:
    - Alan T. Waterman Award
    - National Medal of Science
    - Vannevar Bush Award
    - National Science Board Public Service Award

Figure 3 Honorary Awards screen.

Alan T. Waterman Award

Alan T. Waterman Award Introduction

The Alan T. Waterman Award is given annually in recognition of an outstanding young researcher in any field of science or engineering supported by the National Science Foundation.

You have the following options in preparing an Alan T. Waterman Award:

- View the award criteria
- Find background information on the award
- Get the listing of the award's past winners
- Prepare a nomination for the award

If you have been designated to write a reference for a nominee for the Alan T. Waterman Award, see Prepare a Waterman Reference.

Alan T. Waterman Award Introduction

The Alan T. Waterman Award is given annually in recognition of an outstanding young researcher in any field of science or engineering supported by the National Science Foundation.

You have the following options in preparing an Alan T. Waterman Award:

- View the award criteria
- Find background information on the award
- Get the listing of the award's past winners
- Prepare a nomination for the award

If you have been designated to write a reference for a nominee for the Alan T. Waterman Award, see Prepare a Waterman Reference.

View Award Criteria for Alan T. Waterman Award

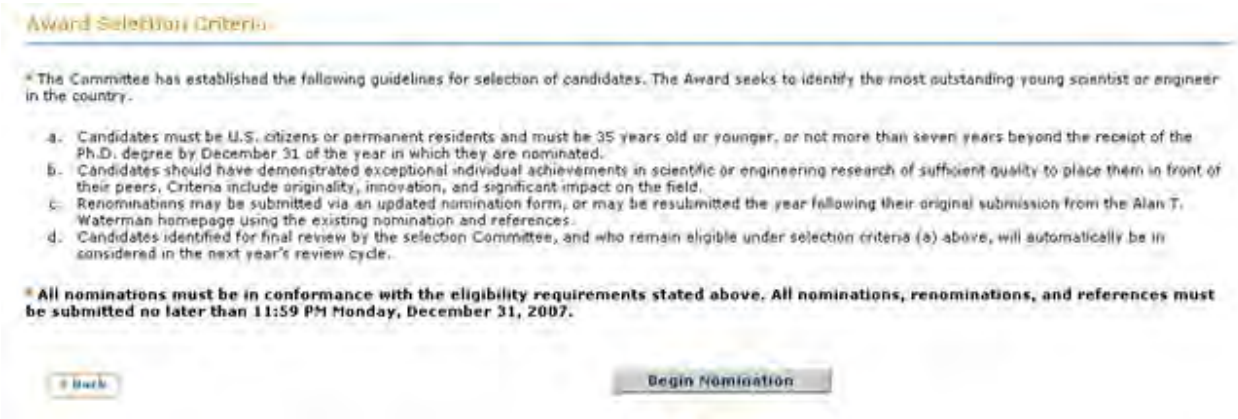
1. Access the **Honorary Awards** screen (Figure 1) (see Register for Honorary Awards or Log In to Honorary Awards).

Figure 1 Honorary Awards screen. The Alan T. Waterman Award link is circled.

2. On the **Honorary Awards** screen (Figure 1), click **Alan T. Waterman Award**. The **Alan T. Waterman Award** screen displays (Figure 2).

Figure 2 Alan T. Waterman Award screen. The View Award Criteria link is circled.

3. Click **View Award Criteria** (Figure 2). The **Award Selection Criteria** screen displays (Figure 3) with the formal criteria for the award.



Award Selection Criteria

* The Committee has established the following guidelines for selection of candidates. The Award seeks to identify the most outstanding young scientist or engineer in the country.

a. Candidates must be U.S. citizens or permanent residents and must be 35 years old or younger, or not more than seven years beyond the receipt of the Ph.D. degree by December 31 of the year in which they are nominated.
b. Candidates should have demonstrated exceptional individual achievements in scientific or engineering research of sufficient quality to place them in front of their peers. Criteria include originality, innovation, and significant impact on the field.
c. Renominations may be submitted via an updated nomination form, or may be resubmitted the year following their original submission from the Alan T. Waterman homepage using the existing nomination and references.
d. Candidates identified for final review by the selection Committee, and who remain eligible under selection criteria (a) above, will automatically be in considered in the next year's review cycle.

*** All nominations must be in conformance with the eligibility requirements stated above. All nominations, renominations, and references must be submitted no later than 11:59 PM Monday, December 31, 2007.**

< Back

Begin Nomination

Figure 3 Award Selection Criteria screen.

Find Background Information on Alan T. Waterman Award

1. Access the **Honorary Awards** screen (Figure 1) (see Register for Honorary Awards or Log In to Honorary Awards).

Figure 1 Honorary Awards screen. The Alan T. Waterman Award link is circled.

2. On the **Honorary Awards** screen (Figure 1), click **Alan T. Waterman Award**. The **Alan T. Waterman Award** screen displays (Figure 2).

Figure 2 Alan T. Waterman Award screen. The Alan T. Waterman Award Background link is circled.

3. Click **Alan T. Waterman Award Background** (Figure 2). The **A. T. Waterman Award** screen displays (Figure 3) in a new window with the background information on the award.

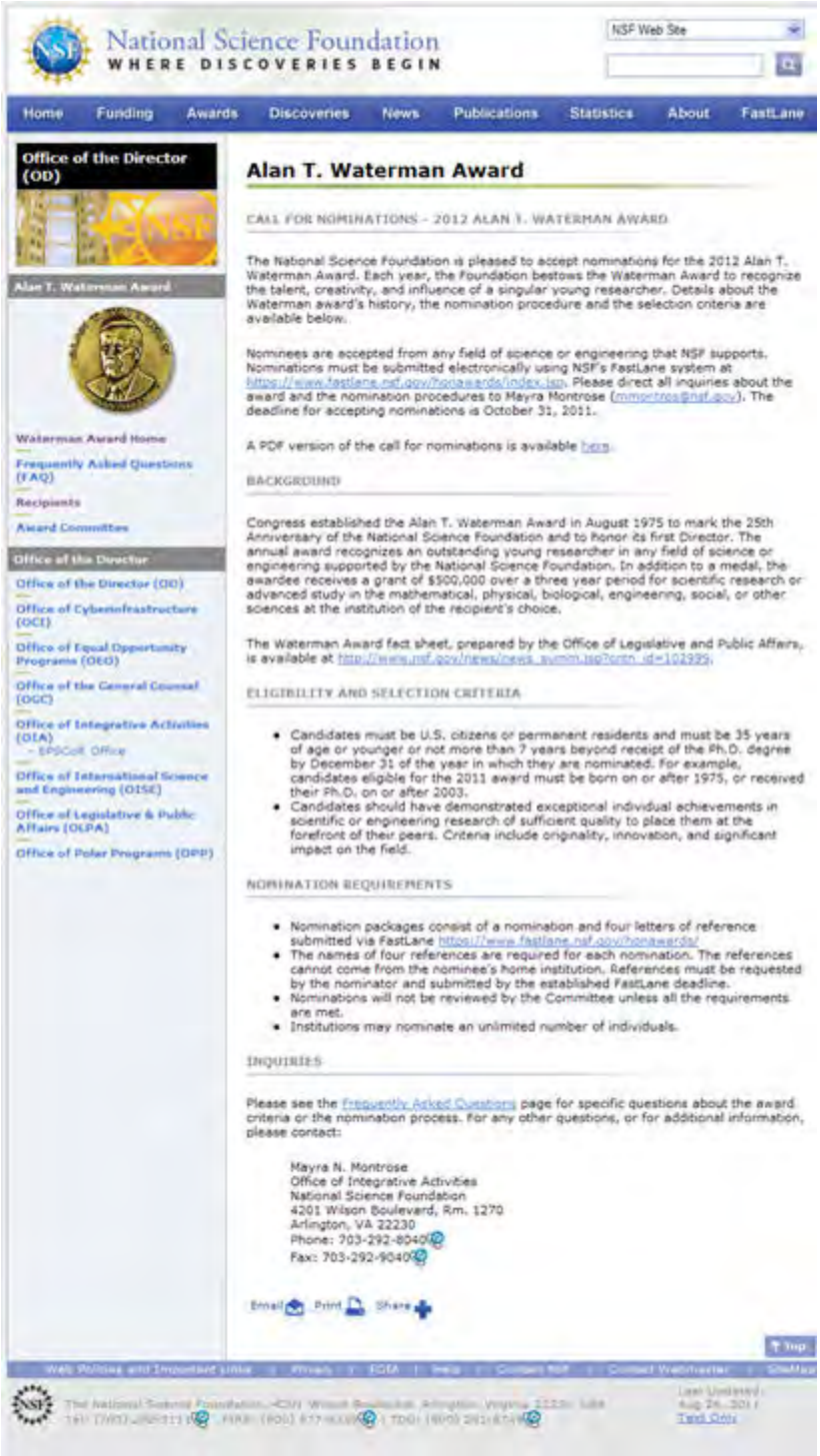


Figure 3 A. T. Waterman Award screen.

Past Winners of the Alan T. Waterman Award

1. Access the **Honorary Awards** screen (Figure 1) (see Register for Honorary Awards or Log In to Honorary Awards).

Figure 1 Honorary Awards screen. The Alan T. Waterman Award link is circled.

2. On the **Honorary Awards** screen (Figure 1), click **Alan T. Waterman Award**. The **Alan T. Waterman Award** screen displays (Figure 2).

Figure 2 Alan T. Waterman Award screen. The Past Winners link is circled.

3. Click **Past Winners** (Figure 2). The **A. T. Waterman Award Recipients** screen displays (Figure 3) in a new window.

Figure 3 A. T. Waterman Award Recipients screen.

Nomination for Waterman Award

Prepare a Nomination for the Alan T. Waterman Award

Introduction

In preparing and submitting a nomination for the Alan T. Waterman Award, you can conduct the following activities:

- Complete the Nomination Form
- Submit a nomination
- Save a nomination
- Edit a saved nomination
- View the entire nomination
- View the nomination in PDF format
- Submit a saved nomination

- View the status of a reference

Prepare a Nomination for the Alan T. Waterman Award

Introduction

In preparing and submitting a nomination for the Alan T. Waterman Award, you can conduct the following activities:

- Complete the Nomination Form
- Submit a nomination
- Save a nomination
- Edit a saved nomination
- View the entire nomination
- View the nomination in PDF format
- Submit a saved nomination
- View the status of a reference

Complete the Nomination Form for the Alan T. Waterman Award

1. Access the **Honorary Awards** screen (Figure 1) (see Register for Honorary Awards or Log In to Honorary Awards).

Figure 1 Honorary Awards screen. The Alan T. Waterman Award link is circled.

2. On the **Honorary Awards** screen (Figure 1), click **Alan T. Waterman Award**. The **Alan T. Waterman Award** screen displays (Figure 2).

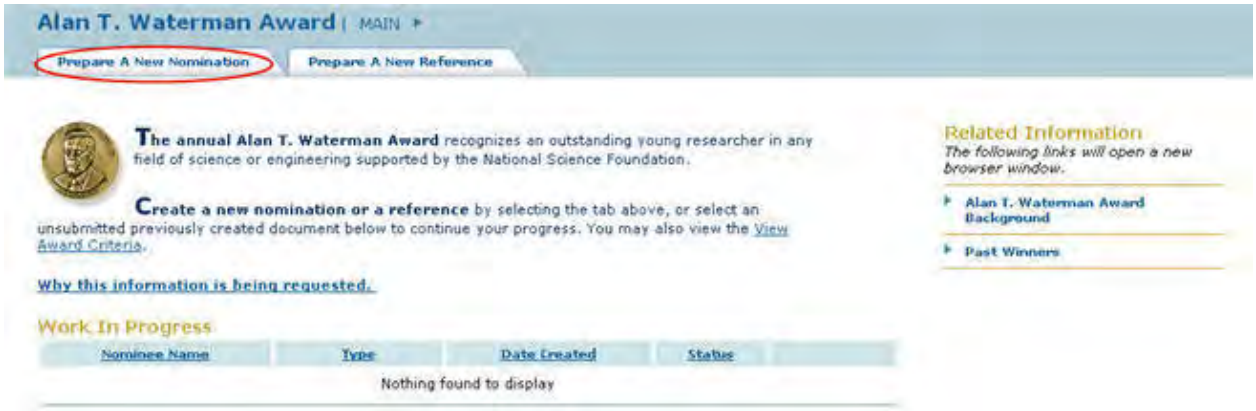


Figure 2 Alan T. Waterman Award screen. The Prepare a New Nomination tab is circled.

3. Click the **Prepare a Nomination** tab (Figure 2). The **Instructions for Preparing a Nomination** screen displays (Figure 3) with general instructions for completing the nomination.

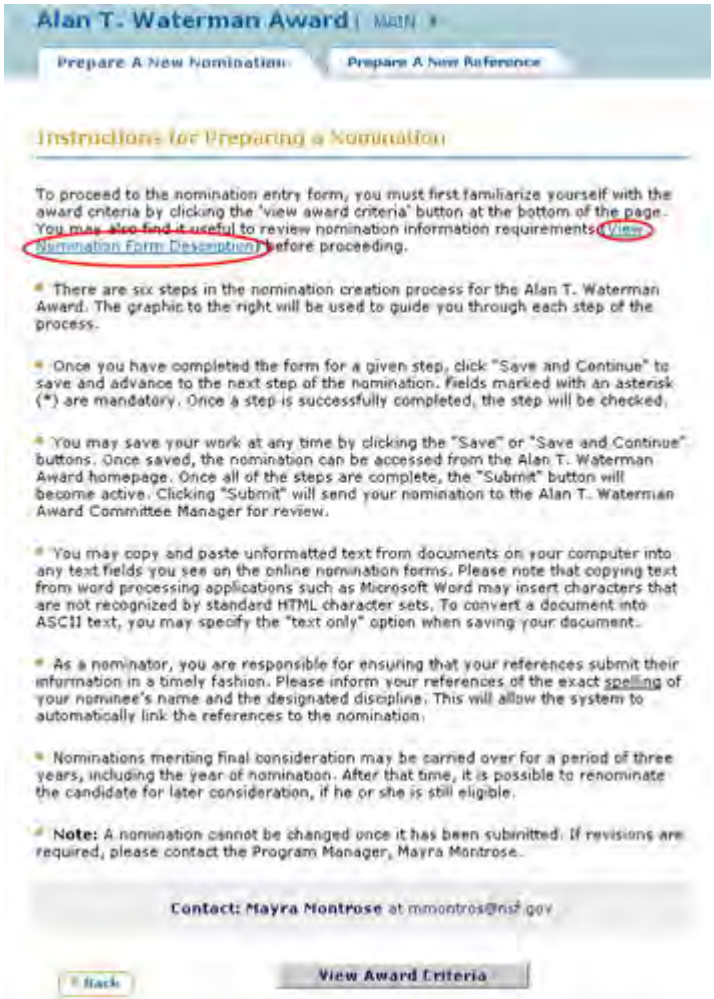
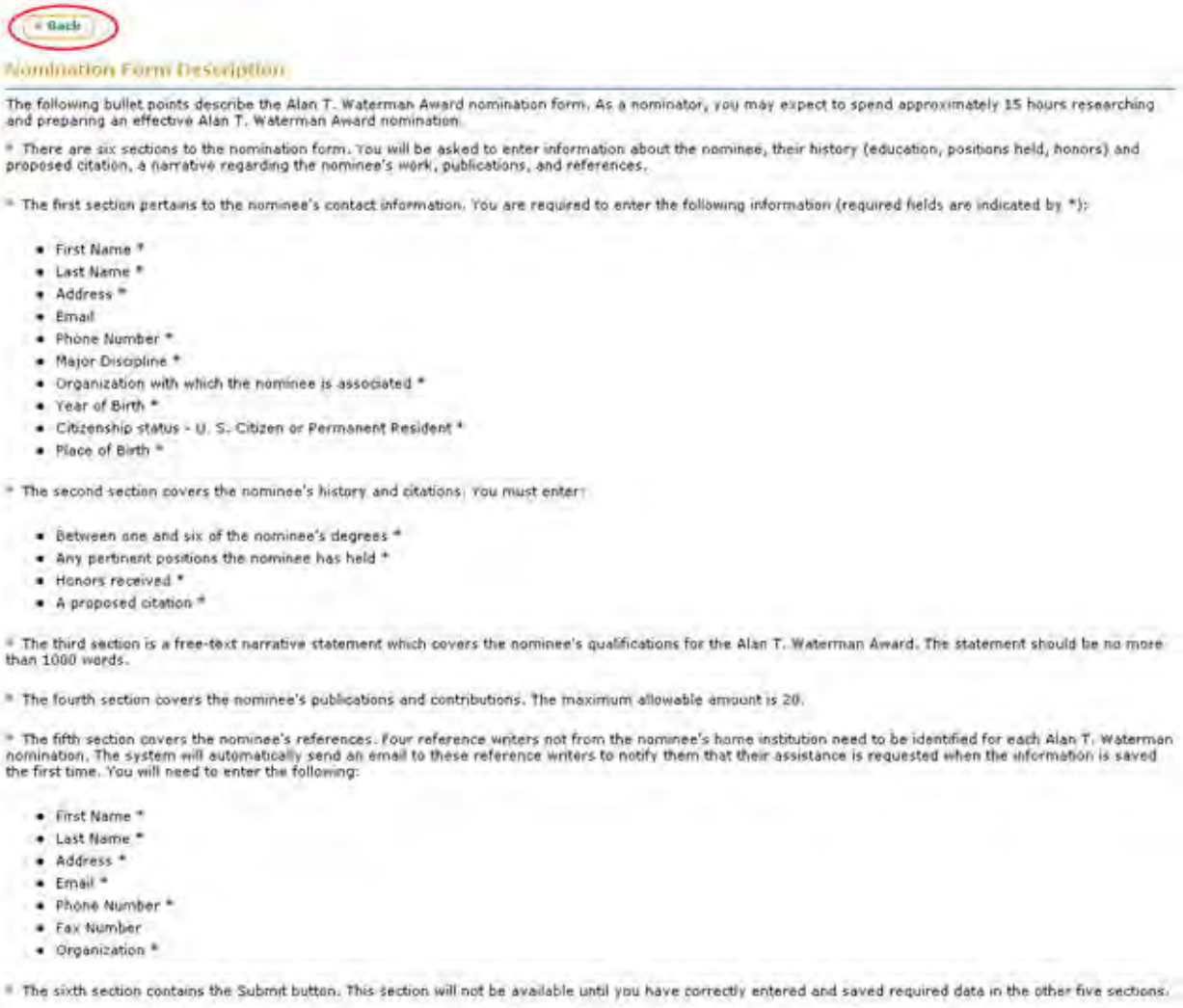


Figure 3 Instructions for Preparing a Nomination screen. The View Nomination Form Description link is circled.

4. To see the form requirements, click **View Nomination Form Description** (Figure 3). **The Nomination Form Description** screen displays (Figure 4) with a listing of all the components of the Nomination Form.



« Back

Nomination Form Description

The following bullet points describe the Alan T. Waterman Award nomination form. As a nominator, you may expect to spend approximately 15 hours researching and preparing an effective Alan T. Waterman Award nomination.

* There are six sections to the nomination form. You will be asked to enter information about the nominee, their history (education, positions held, honors) and proposed citation, a narrative regarding the nominee's work, publications, and references.

* The first section pertains to the nominee's contact information. You are required to enter the following information (required fields are indicated by *):

- First Name *
- Last Name *
- Address *
- Email
- Phone Number *
- Major Discipline *
- Organization with which the nominee is associated *
- Year of Birth *
- Citizenship status - U. S. Citizen or Permanent Resident *
- Place of Birth *

* The second section covers the nominee's history and citations. You must enter:

- Between one and six of the nominee's degrees *
- Any pertinent positions the nominee has held *
- Honors received *
- A proposed citation *

* The third section is a free-text narrative statement which covers the nominee's qualifications for the Alan T. Waterman Award. The statement should be no more than 1000 words.

* The fourth section covers the nominee's publications and contributions. The maximum allowable amount is 20.

* The fifth section covers the nominee's references. Four reference writers not from the nominee's home institution need to be identified for each Alan T. Waterman nomination. The system will automatically send an email to these reference writers to notify them that their assistance is requested when the information is saved the first time. You will need to enter the following:

- First Name *
- Last Name *
- Address *
- Email *
- Phone Number *
- Fax Number
- Organization *

* The sixth section contains the Submit button. This section will not be available until you have correctly entered and saved required data in the other five sections.

Figure 4 Nomination Form Description screen. The Back link is circled.

5. Click the **Back** button (Figure 4). The **Instructions for Preparing a Nomination** screen displays (Figure 5).

Prepare A New Nomination | Prepare A New Reference

Instructions for Preparing a Nomination

To proceed to the nomination entry form, you must first familiarize yourself with the award criteria by clicking the 'view award criteria' button at the bottom of the page. You may also find it useful to review nomination information requirements (View Nomination Form Description) before proceeding.

- There are six steps in the nomination creation process for the Alan T. Waterman Award. The graphic to the right will be used to guide you through each step of the process.

- Once you have completed the form for a given step, click "Save and Continue" to save and advance to the next step of the nomination. Fields marked with an asterisk (*) are mandatory. Once a step is successfully completed, the step will be checked.

- You may save your work at any time by clicking the "Save" or "Save and Continue" buttons. Once saved, the nomination can be accessed from the Alan T. Waterman Award homepage. Once all of the steps are complete, the "Submit" button will become active. Clicking "Submit" will send your nomination to the Alan T. Waterman Award Committee Manager for review.

- You may copy and paste unformatted text from documents on your computer into any text fields you see on the online nomination forms. Please note that copying text from word processing applications such as Microsoft Word may insert characters that are not recognized by standard HTML character sets. To convert a document into ASCII text, you may specify the "text only" option when saving your document.

- As a nominator, you are responsible for ensuring that your references submit their information in a timely fashion. Please inform your references of the exact spelling of your nominee's name and the designated discipline. This will allow the system to automatically link the references to the nomination.

- Nominations meriting final consideration may be carried over for a period of three years, including the year of nomination. After that time, it is possible to renominate the candidate for later consideration, if he or she is still eligible.

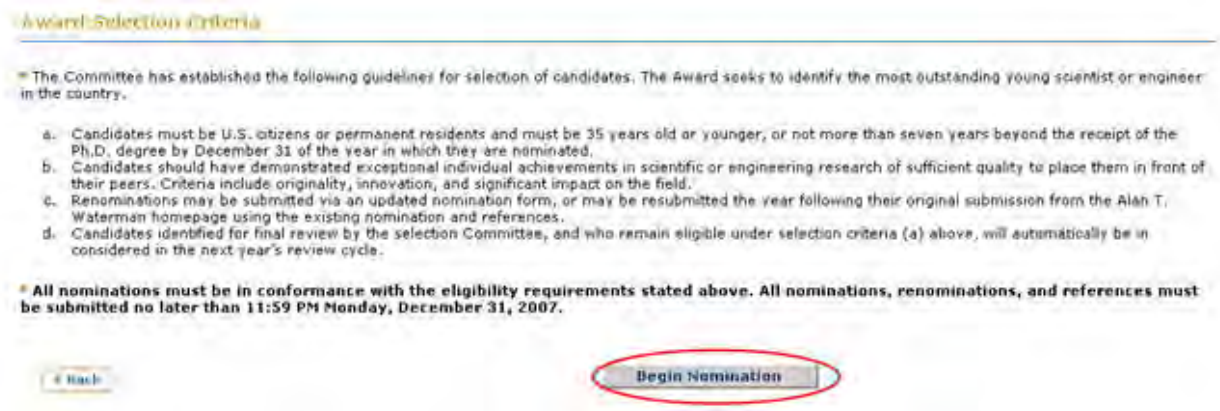
- **Note:** A nomination cannot be changed once it has been submitted. If revisions are required, please contact the Program Manager, Mayra Montrose.

Contact: Mayra Montrose at mmontros@nsf.gov

< Back | View Award Criteria

Figure 5 Instructions for Preparing a Nomination screen. The View Award Criteria button is circled.

6. Click the **View Award Criteria** button (Figure 5). The **Award Selection Criteria** screen displays (Figure 6).



Award Selection Criteria

- The Committee has established the following guidelines for selection of candidates. The Award seeks to identify the most outstanding young scientist or engineer in the country.

a. Candidates must be U.S. citizens or permanent residents and must be 35 years old or younger, or not more than seven years beyond the receipt of the Ph.D. degree by December 31 of the year in which they are nominated.
b. Candidates should have demonstrated exceptional individual achievements in scientific or engineering research of sufficient quality to place them in front of their peers. Criteria include originality, innovation, and significant impact on the field.
c. Renominations may be submitted via an updated nomination form, or may be resubmitted the year following their original submission from the Alan T. Waterman homepage using the existing nomination and references.
d. Candidates identified for final review by the selection Committee, and who remain eligible under selection criteria (a) above, will automatically be in considered in the next year's review cycle.

- **All nominations must be in conformance with the eligibility requirements stated above. All nominations, renominations, and references must be submitted no later than 11:59 PM Monday, December 31, 2007.**

< Back | Begin Nomination

Figure 6 Award Selection Criteria screen. The Begin Nomination button is circled.

7. Click the **Begin Nomination** button (Figure 6). The **Nomination Form** screen displays (Figure 7) with the **Nomination Information** section open.

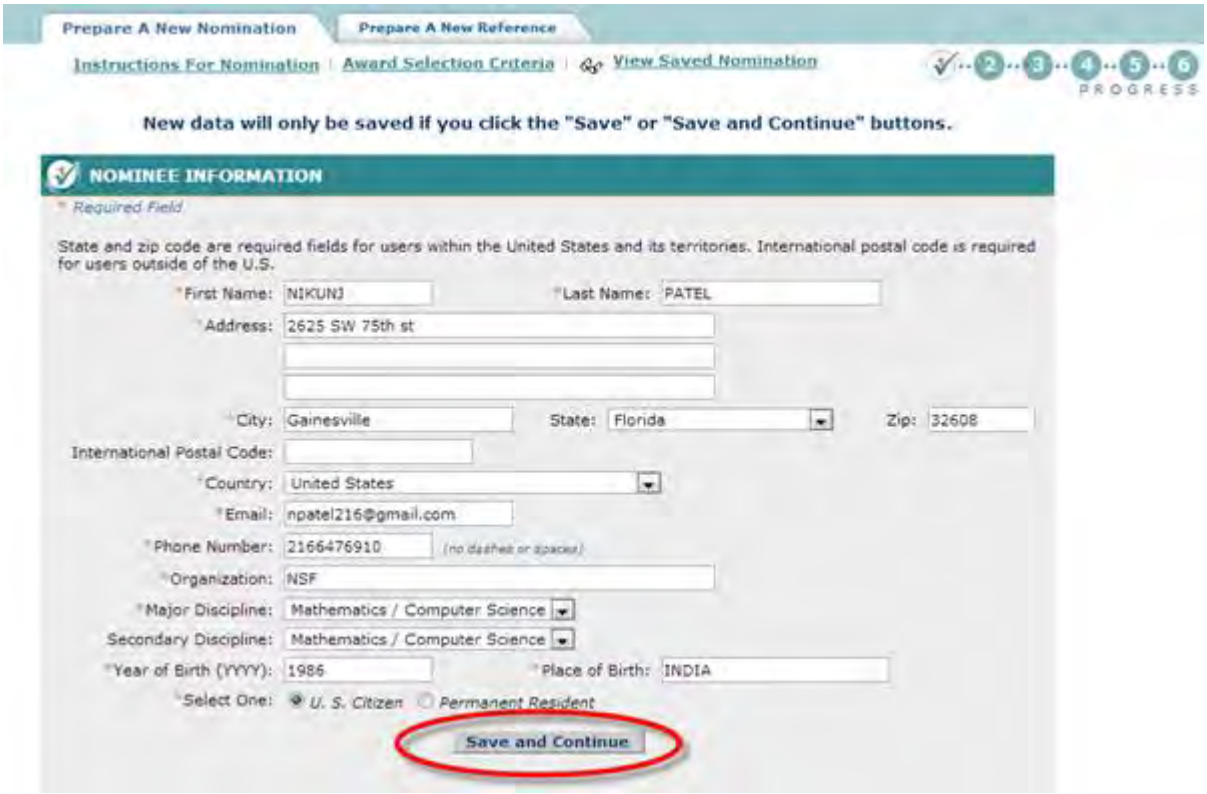


Figure 7 Nominee Information section of the Nomination Form screen. The Save and Continue button is circled.

8. In the **Nomination Information** section (Figure 7), enter the following information about the nominee in the appropriate boxes:
    - First name
    - Last name
    - Address
    - City
    - State
    - Zip Code
    - Country
    - International postal code (optional)
    - Phone number
    - Email address (optional)
    - Organization
    - Major discipline
    - Secondary discipline (optional)
    - Year of birth
    - Place of birth
9. Click the radio button for either U.S. citizen or Permanent Resident (Figure 7).
10. Click the **Save and Continue** button (Figure 7). (You can also click the **Save** button to save the form to complete later.) The **Nomination Form** screen displays (Figure 8) with the **History and Citations** section open.

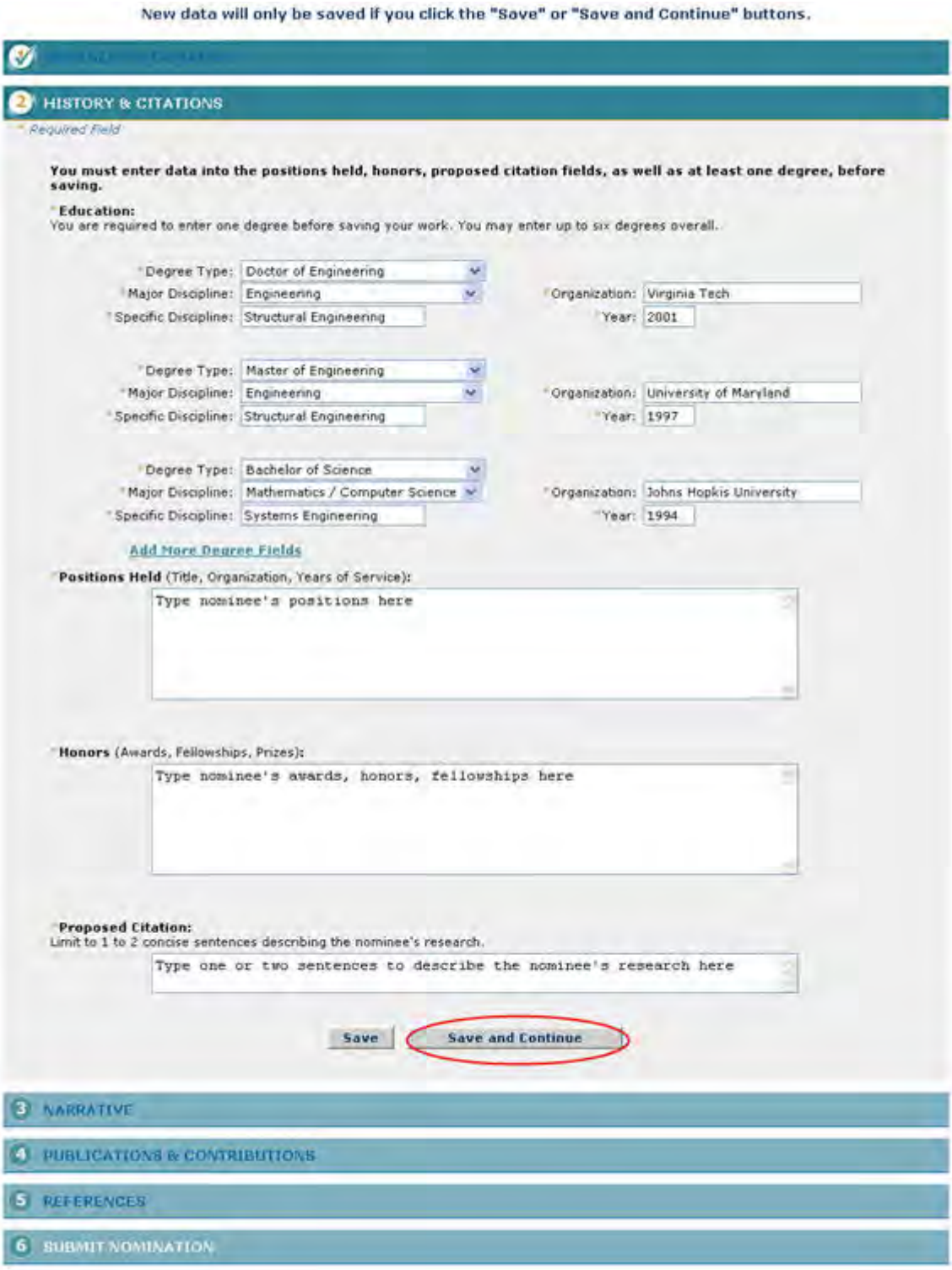


Figure 8 History and Citations section of the Nomination Form screen. The Save and Continue button is circled.

11. In the **Education** section (Figure 8), enter the degrees that the nominee has received. For each degree, enter the following:

- Degree type
- Major discipline
- Specific discipline
- Institution
- Year

12. If you need to list more than three degrees, click **Add More Degree Fields**. More fields display.
13. In the **Positions Held** box (Figure 8), type the professional positions the nominee has held.
14. In the **Honors** box (Figure 8), type any honors the nominee has received.
15. In the **Proposed Citation** box (Figure 8), describe in one or two sentences the research the nominee is engaged in.
16. Click the **Save and Continue** button (Figure 8). (You can also click the **Save** button to save the form to complete it later.) The **Nomination Form** screen displays (Figure 9) with the **Narrative** section opened.

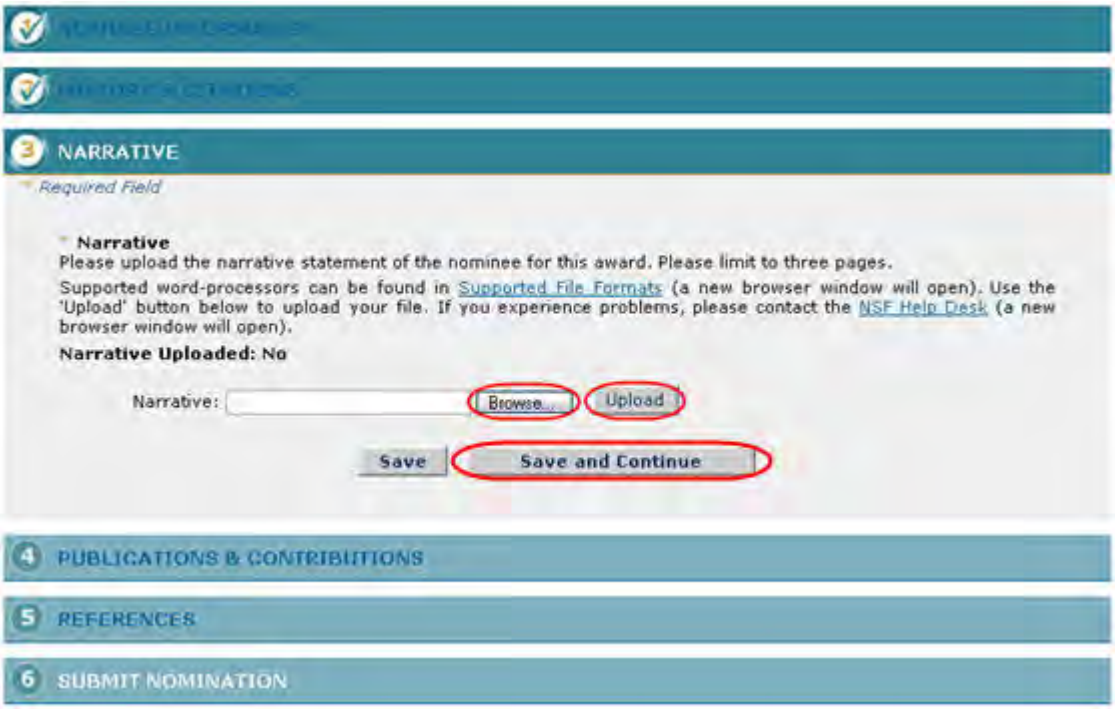


Figure 9 Narrative section of the Nomination Form screen. The Save and Continue button is circled.

17. In the **Narrative** section (Figure 9), browse to and upload the nominee's qualifications for the award.
18. Click the **Save and Continue** button (Figure 9). (You can also click the **Save** button to save the form to complete later.) The **Nomination Form** screen displays (Figure 10) with the **Publications and Contributions** section opened.

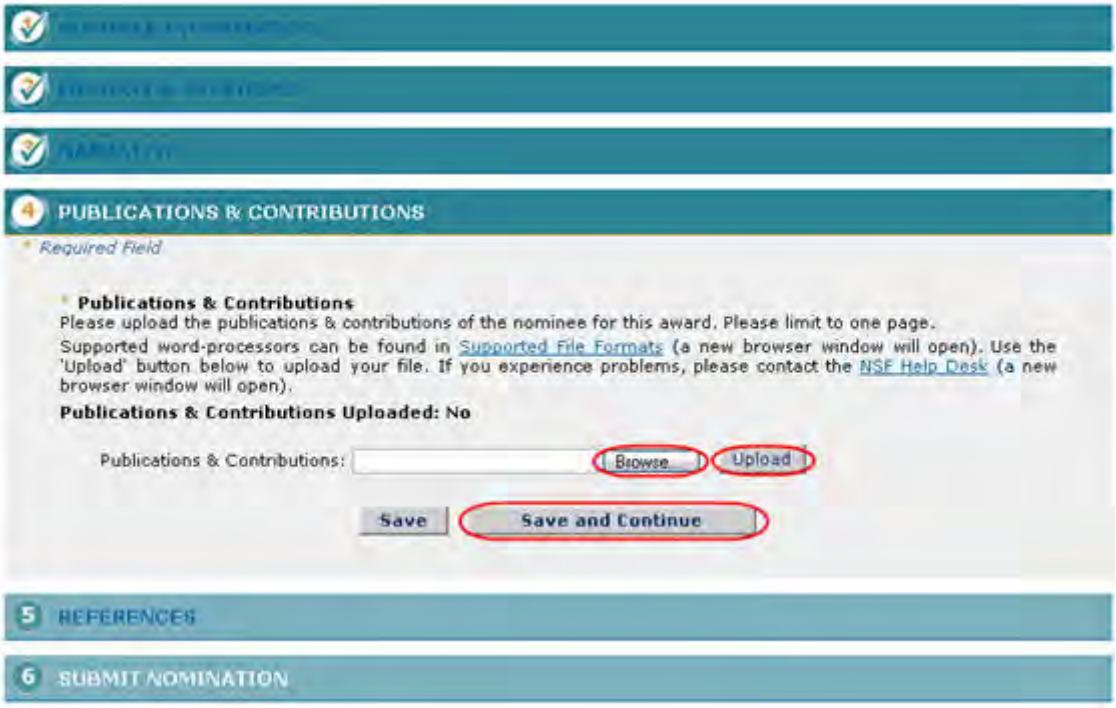


Figure 10 Publications and Contributions section of the Nomination Form screen. The Save and Continue button is circled.

19. In the **Publications and Contributions** section (Figure 10), browse to and upload publications and contributions.
20. Click the **Save and Continue** button (Figure 10). (You can also click the **Save** button to save the form to complete later.) The **Nomination Form** screen displays (Figure 11) with the **References** section opened.

New data will only be saved if you click the "Save" or "Save and Continue" buttons.

REFERENCES

* Required Field

State and zip code are required fields for users within the United States and its territories. International postal code is required for users outside of the U.S.

Please add four references familiar with technical aspects and not from the nominee's home organization.

As the nominator, you are responsible for contacting references. Nominations with fewer than 4 references will not be reviewed by the committee.

Note: The system will automatically send an email to these reference writers to notify them that their assistance is requested when the information is saved the first time.

Reference 1: Remove Reference 1 (afaf jljk)

*First Name: Tommy *Last Name: Thomas
*Address: 888 N. Hamilton St.
*City: Arlington State: Virginia Zip: 22180
International Postal Code:
*Country: United States
*Email: jkljk@nsf.gov
*Phone Number: 1111111111 (no dashes or spaces)
Fax Number: (no dashes or spaces)
*Organization: USDA

Reference 2: Remove Reference 2 (aldsfjlk jlkajdf)

*First Name: Marsha *Last Name: Marsh
*Address: 1409 N. Quincy St.
*City: Alexandira State: Virginia Zip: 22180
International Postal Code:
*Country: United States
*Email: jlkjk@nsf.gov
*Phone Number: 1111111111 (no dashes or spaces)
Fax Number: (no dashes or spaces)
*Organization: University of Maryland

Reference 3: Remove Reference 3 (jkljlk jkjlkj)

*First Name: Joey *Last Name: Joeson
*Address: 123 St. Barnabus Road
*City: Blacksburg State: Virginia Zip: 22180
International Postal Code:
*Country: United States
*Email: jlkj@nsf.gov
*Phone Number: 1111111111 (no dashes or spaces)
Fax Number: (no dashes or spaces)
*Organization: Virginia Tech

Reference 4: Remove Reference 4 (jlkjlk jlkjlk)

*First Name: Robert *Last Name: Bobby
*Address: 9627 N. 28th St.
*City: Washington State: District of Columbia Zip: 22180
International Postal Code:
*Country: United States
*Email: jklj@nsf.gov
*Phone Number: 1111111111 (no dashes or spaces)
Fax Number: (no dashes or spaces)
*Organization: NSF

Save | Save and Continue

6 SUBMIT NOMINATION

Figure 11 References section of the Nomination Form screen. The Save and Continue button is circled.

21. In the **References** section (Figure 11), list at least four references who are not from the nominee's organization and who are familiar with the technical aspects of the nominee's work. For each reference, enter the following information in the appropriate boxes:
    - First name
    - Last name
    - Address
    - City
    - State
    - Zip code
    - Country
    - International postal code (optional)
    - Email
    - Phone number
    - Fax number (optional)
    - Organization

You have now completed the Nomination form. You have these options:

- Save the nomination to edit it or submit it later
- Submit the nomination

Submit a Nomination for the Alan T. Waterman Award

1. Access the **Nomination Form** screen (Figure 1) with the **Submit Nomination** section open (see Complete the Nomination Form).

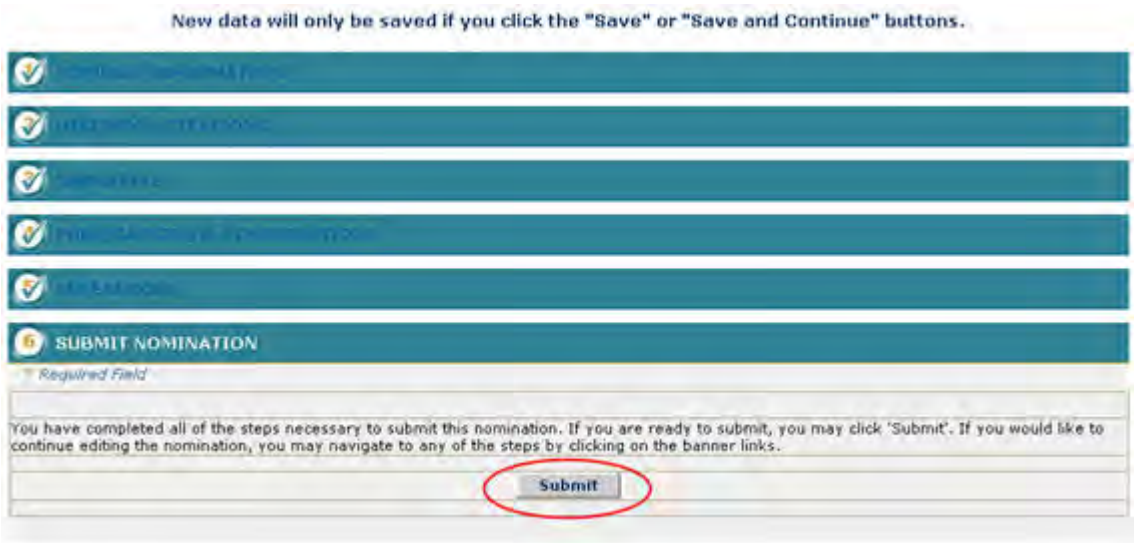


Figure 1 Nomination Form screen. The Submit button is circled.

2. Click the **Submit** button (Figure 1). The **Confirm Award Nomination Submission** screen displays (Figure 2).

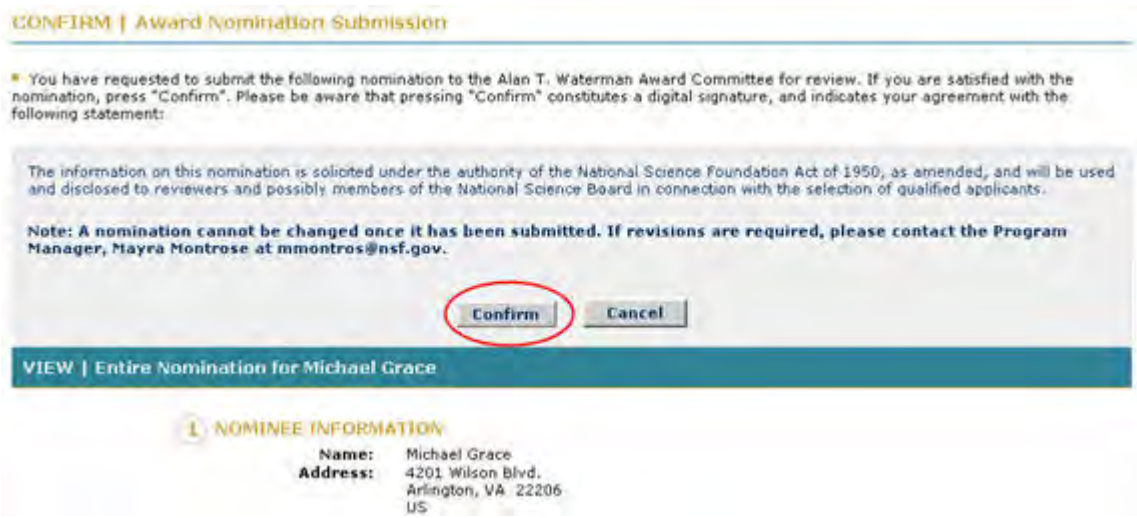


Figure 2 Confirm Award Nomination Submission screen. The Confirm button is circled.

3. Click the **Confirm** button (Figure 2). The **Confirmation** screen displays (Figure 3) with the message that the nomination has been submitted.

Figure 3 Confirmation screen.

4. Click the **Back to Award Homepage** (Figure 3). The **Alan T. Waterman Award** screen displays (Figure 4) with the nomination listed with the status of Submitted.

Figure 4 Alan T. Waterman Award screen with the nomination listed with the status of Submitted.

Save a Nomination for the Waterman Award

After you have completed at least the first section of a nomination, you can save it for future work.

1. Access the **Nomination Form** screen (Figure 1) and complete at least the first section of the nomination (see Complete the Nomination Form).

New data will only be saved if you click the "Save" or "Save and Continue" buttons.

REFERENCES

* Required Field

State and zip code are required fields for users within the United States and its territories. International postal code is required for users outside of the U.S.

Please add four references familiar with technical aspects and not from the nominee's home organization.

As the nominator, you are responsible for contacting references. Nominations with fewer than 4 references will not be reviewed by the committee.

Note: The system will automatically send an email to these reference writers to notify them that their assistance is requested when the information is saved the first time.

Reference 1: Remove Reference 1 (afof jlk)

*First Name: Tommy *Last Name: Thomas
*Address: 888 N. Hamilton St.
*City: Arlington State: Virginia Zip: 22180
International Postal Code:
*Country: United States
*Email: jkljk@nsf.gov
*Phone Number: 1111111111 (no dashes or spaces)
Fax Number: (no dashes or spaces)
*Organization: USDA

Reference 2: Remove Reference 2 (aldsfjlk jlkajdf)

*First Name: Marsha *Last Name: Marsh
*Address: 1409 N. Quincy St.
*City: Alexandira State: Virginia Zip: 22180
International Postal Code:
*Country: United States
*Email: jlkjk@nsf.gov
*Phone Number: 1111111111 (no dashes or spaces)
Fax Number: (no dashes or spaces)
*Organization: University of Maryland

Reference 3: Remove Reference 3 (jkljlk jkjlkj)

*First Name: Joey *Last Name: Joeson
*Address: 123 St. Barnabus Road
*City: Blacksburg State: Virginia Zip: 22180
International Postal Code:
*Country: United States
*Email: jlkj@nsf.gov
*Phone Number: 1111111111 (no dashes or spaces)
Fax Number: (no dashes or spaces)
*Organization: Virginia Tech

Reference 4: Remove Reference 4 (jlkjlk jlkjlk)

*First Name: Robert *Last Name: Bobby
*Address: 9627 N. 28th St.
*City: Washington State: District of Columbia Zip: 22180
International Postal Code:
*Country: United States
*Email: jklj@nsf.gov
*Phone Number: 1111111111 (no dashes or spaces)
Fax Number: (no dashes or spaces)
*Organization: NSF

Save | Save and Continue

6 SUBMIT NOMINATION

Figure 1 Nomination Form screen open to the References section. The Save button is circled.

2. On the **Nomination Form** screen (Figure 1), click the **Save** button. The Nomination is saved, and the **Nomination Form** screen displays with the section open on which you clicked the **Save** button (Figure 2).

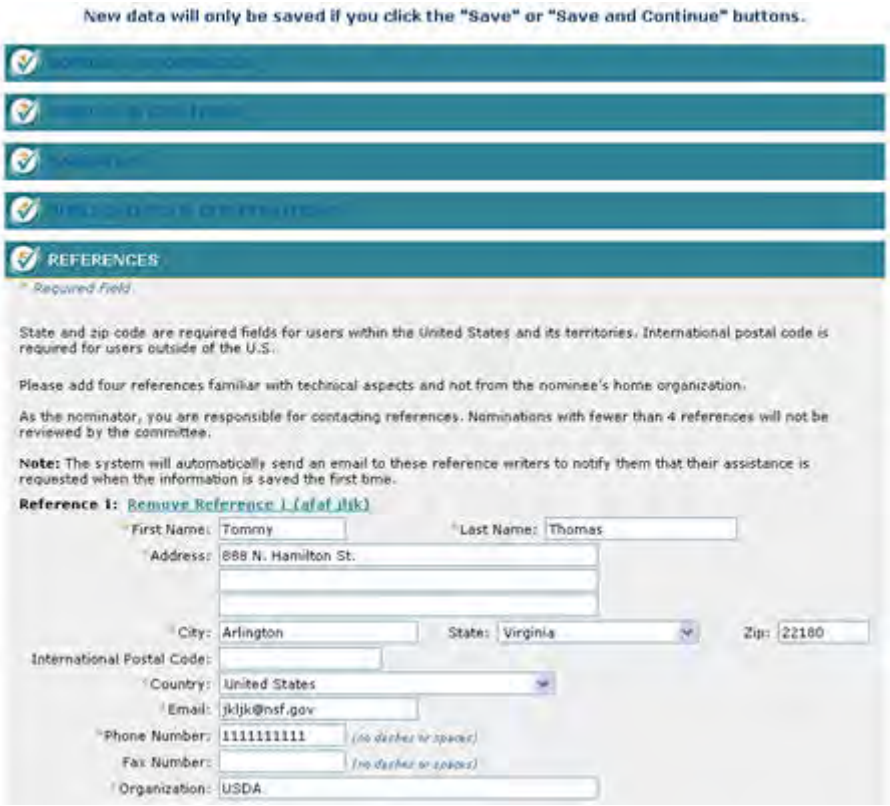


Figure 2 Nomination Form screen after the nomination has been saved.

The nomination is now listed on the **Alan T. Waterman Award** screen (Figure 3) with the status of In Progress.

Figure 3 Alan T. Waterman Award screen with the saved nomination listed with the status of In Progress.

Edit a Saved Nomination for the Alan T. Waterman Award

1. Access the **Honorary Awards** screen (Figure 1) (see Log In to Honorary Awards).

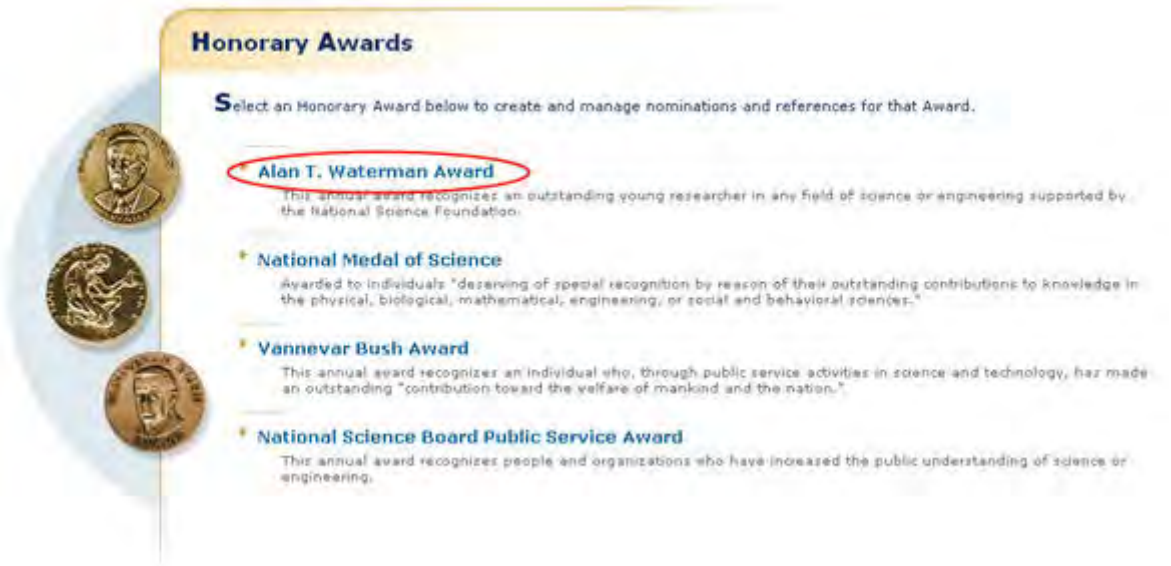


Figure 1 Honorary Awards screen. The Alan T. Waterman Award link is circled.

2. On the **Honorary Awards** screen (Figure 1), click **Alan T. Waterman Award**. The **Alan T. Waterman Award** screen displays (Figure 2) with the saved nomination listed in the **Work in Progress** section.

Figure 2 Alan T. Waterman Award screen. The link to the saved nomination is circled.

3. Click the nomination title (Figure 2). The **Nomination Form** screen displays (Figure 3) with the **Nominee Information** section open. On this screen, you can edit any section by clicking on the section title and then clicking the **Save and Continue** button or the **Save** button (see Complete the Nomination Form, Step 8 through Step 22, for detailed instructions on each section).

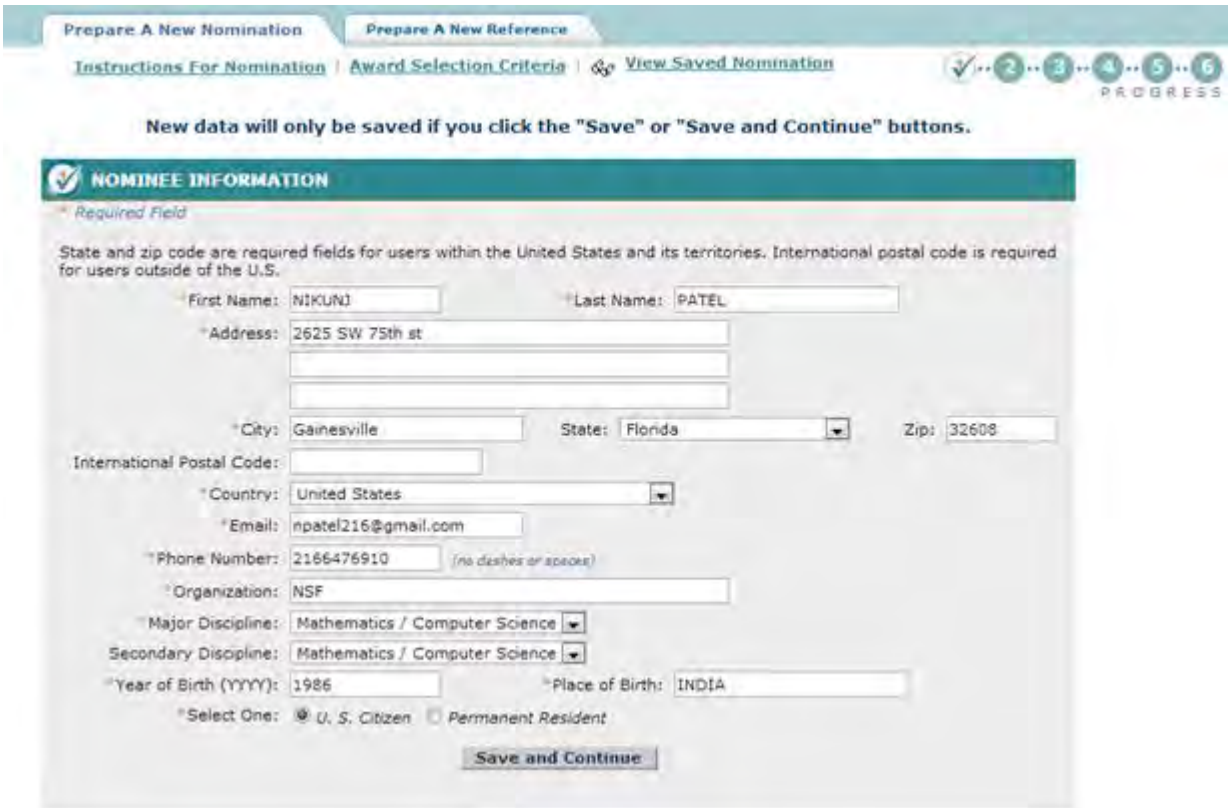


Figure 3 Nomination Form screen with the Nomination Information section open.

Submit a Saved Nomination for the Alan T. Waterman Award

1. Access the **Honorary Awards** screen (Figure 1) (see Log In to Honorary Awards).

Figure 1 Honorary Awards screen. The Alan T. Waterman Award link is circled.

2. On the **Honorary Awards** screen (Figure 1), click **Alan T. Waterman Award**. The **Alan T. Waterman Award** screen displays (Figure 2) with the saved nomination in the **Work in Progress** section.

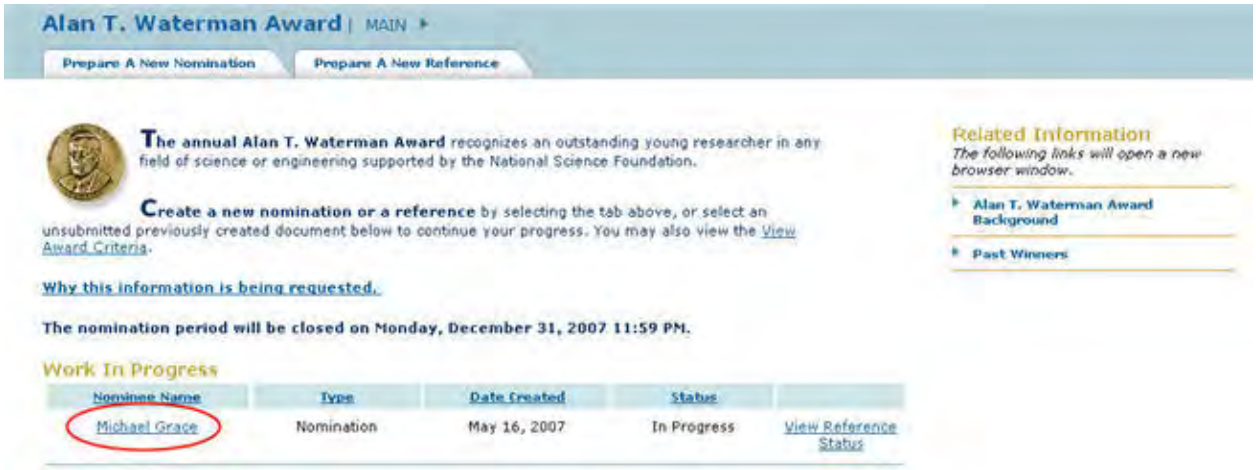


Figure 2 Alan T. Waterman Award screen. The link to the saved nomination is circled.

3. Click the nomination title (Figure 2). The **Nomination Form** screen displays (Figure 3).

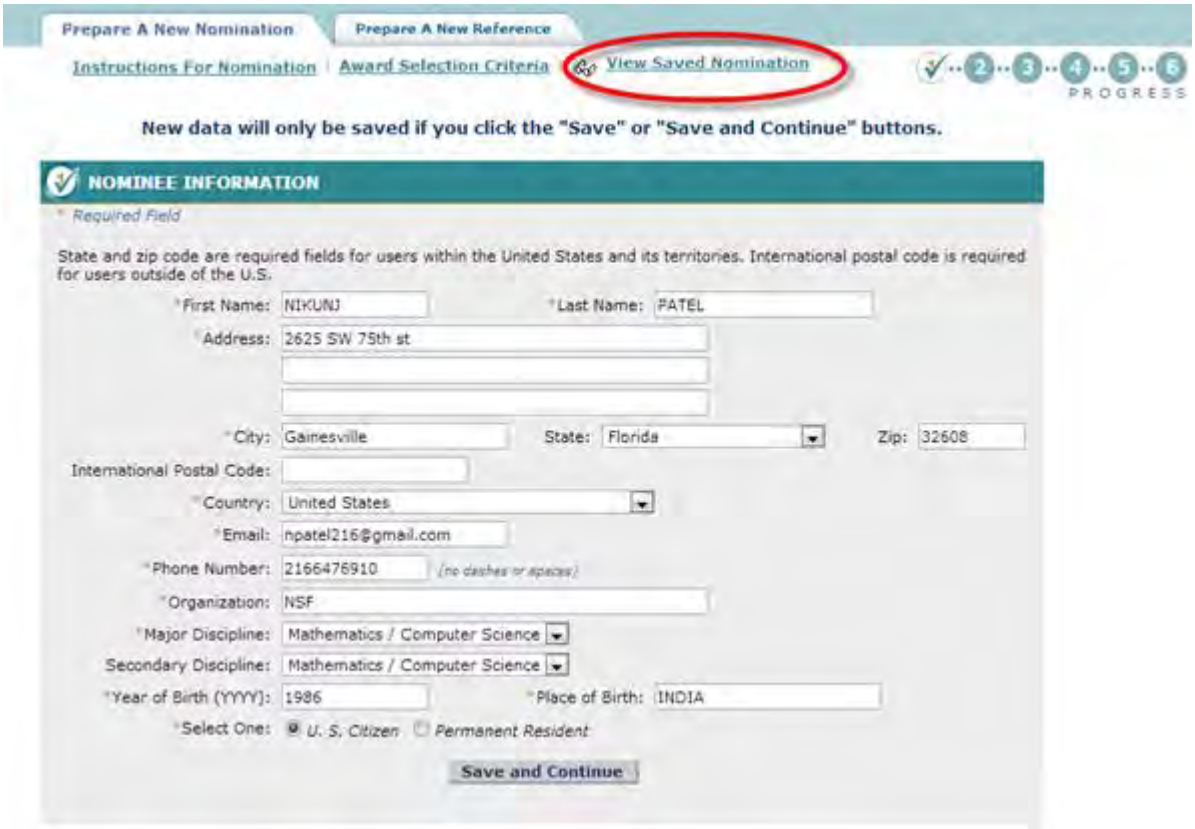


Figure 3 Nomination Form screen. The View Saved Nomination link is circled.

4. Click **View Saved Nomination** (Figure 3). The **View Entire Nomination** screen displays (Figure 4).

VIEW | Entire Nomination for Michael Grace

1 NOMINEE INFORMATION Edit

Contact Name: Michael Grace
Address: 4201 Wilson Blvd.
Arlington, VA 22230
United States
Email: test@nsf.gov
Phone: 7035551111
Major Discipline: Behavioral / Social Sciences
Secondary Discipline:
Organization: DIS
Year of Birth: 1970
Citizenship: U. S. Citizen
Place Of Birth: Vienna, VA

2 HISTORY & CITATIONS Edit

Education:
- Bachelor of Science, Materials, Jame Madison, 1995
  Major Discipline: Engineering

Positions Held: None
Honors: None
Proposed Citation: None

3 NARRATIVE Edit

Narrative Uploaded: Yes

To view this information in PDF format, click "View PDF". A new browser window will open. To print the PDF, use your browser's print function in the new window. View PDF

4 PUBLICATIONS & CONTRIBUTIONS Edit

Publications & Contributions Uploaded: Yes

To view this information in PDF format, click "View PDF". A new browser window will open. To print the PDF, use your browser's print function in the new window. View PDF

5 REFERENCES Edit

Name: John Simmons
Organization: DIS
Email: jsimms@nsf.gov

Name: John Starr
Organization: DIS
Email: jstarr@nsf.gov

Name: John Sharpp
Organization: DIS
Email: jsharpp@nsf.gov

Name: John Simpkins
Organization: DIS
Email: jsimpkins@nsf.gov

6 SUBMIT NOMINATION

Submit

Figure 4 View Entire Nomination screen. The Submit button is circled.

5. Click the **Submit** button (Figure 4). The **Confirm Award Nomination Submission** screen displays (Figure 5).

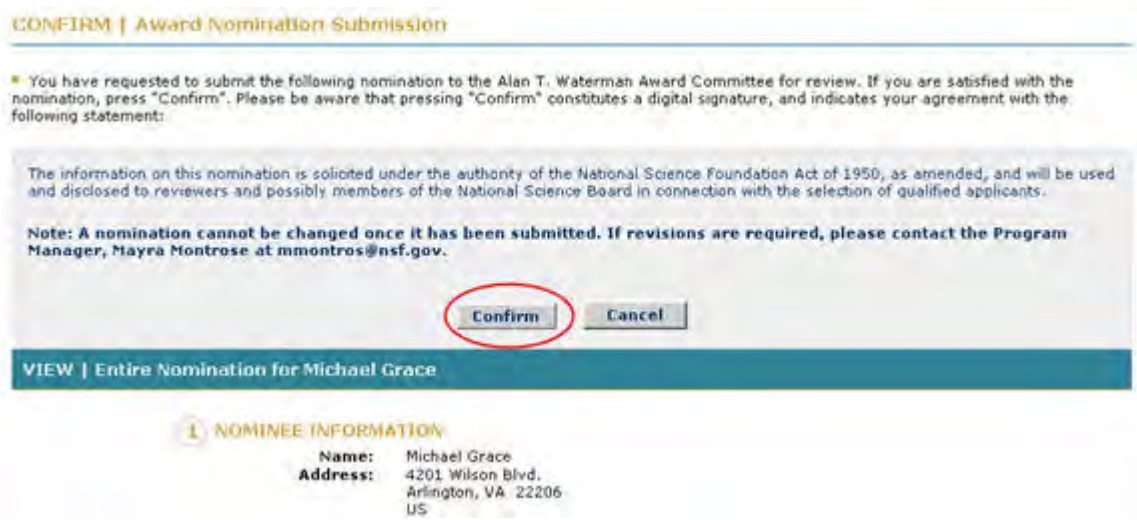


Figure 5 Confirm Award Nomination Submission screen. The Confirm button is circled.

6. Click the **Confirm** button (Figure 5). The **Confirmation** screen displays (Figure 6) with the message that the nomination has been submitted.

Figure 6 Confirmation screen.

7. Click **Back to Award Homepage** (Figure 6). The **Alan T. Waterman Award** screen displays (Figure 7) with the nomination listed with the status Submitted.

Figure 7 Alan T. Waterman Award screen with the nomination now listed with the status of Submitted.

View an Entire Nomination for the Alan T. Waterman Award

1. Access the **Honorary Awards** screen (Figure 1) (see Log In to Honorary Awards).

Figure 1 Honorary Awards screen. The Alan T. Waterman Award link is circled.

2. On the **Honorary Awards** screen (Figure 1), click **Alan T. Waterman Award**. The **Alan T. Waterman Award** screen displays (Figure 2).

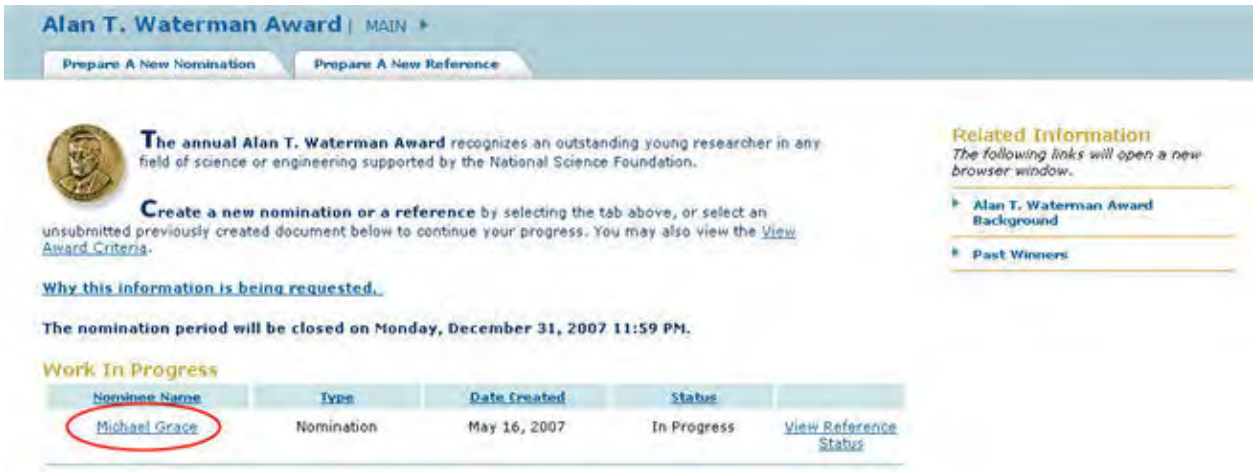


Figure 2 Alan T. Waterman Award screen. The link to the saved nomination is circled.

3. Click the nomination title (Figure 2). The **Nomination Form** screen displays (Figure 3).

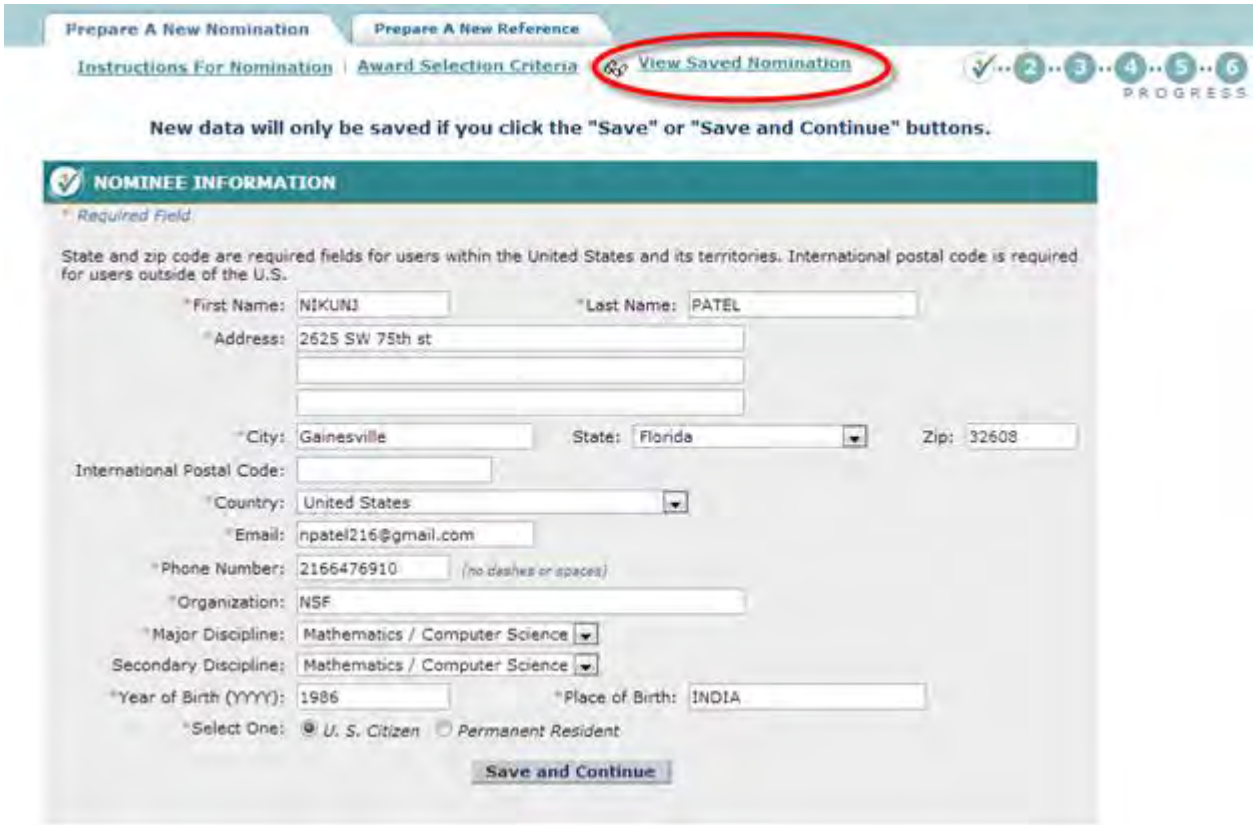


Figure 3 Nomination Form screen. The View Saved Nomination link is circled.

4. Click **View Saved Nomination** (Figure 3). The **View Entire Nomination** screen displays (Figure 4). You can edit from this screen also by clicking the **Edit** button for any section.

VIEW | Entire Nomination for Michael Grace

1 NOMINEE INFORMATION Edit

Contact Name: Michael Grace
Address: 4201 Wilson Blvd.
Arlington, VA 22230
United States
Email: test@nsf.gov
Phone: 7035551111
Major Discipline: Behavioral / Social Sciences
Secondary Discipline:
Organization: DIS
Year of Birth: 1970
Citizenship: U. S. Citizen
Place Of Birth: Vienna, VA

2 HISTORY & CITATIONS Edit

Education:
- Bachelor of Science, Materials, Jame Madison, 1995
  Major Discipline: Engineering

Positions Held: None
Honors: None
Proposed Citation: None

3 NARRATIVE Edit

Narrative Uploaded: Yes

To view this information in PDF format, click "View PDF". A new browser window will open.
To print the PDF, use your browser's print function in the new window. View PDF

4 PUBLICATIONS & CONTRIBUTIONS Edit

Publications & Contributions Uploaded: Yes

To view this information in PDF format, click "View PDF". A new browser window will open.
To print the PDF, use your browser's print function in the new window. View PDF

5 REFERENCES Edit

Name: John Simmons
Organization: DIS
Email: jsimms@nsf.gov

Name: John Starr
Organization: DIS
Email: jstarr@nsf.gov

Name: John Sharpp
Organization: DIS
Email: jsharpp@nsf.gov

Name: John Simpkins
Organization: DIS
Email: jsimpkins@nsf.gov

6 SUBMIT NOMINATION

Submit

Figure 4 View Entire Nomination screen.

View a Nomination in PDF for the Alan T. Waterman Award

1. Access the **View Entire Nomination** screen (Figure 1) (see View Entire Nomination).

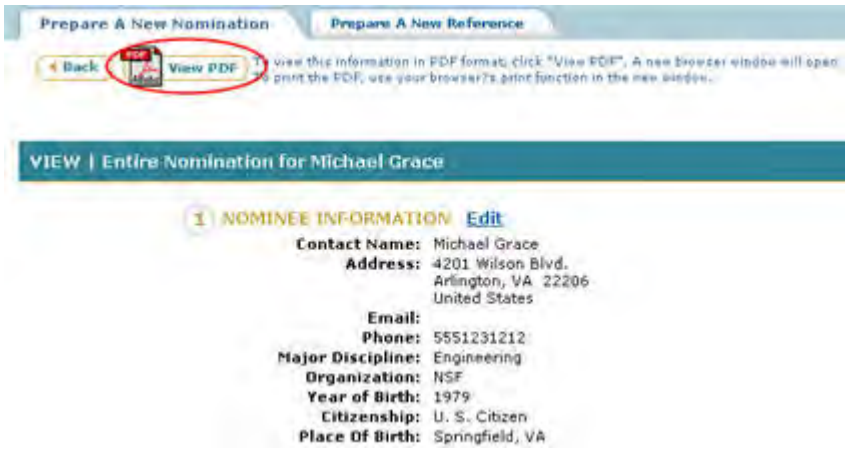


Figure 1 View Entire Nomination screen. The View PDF link is circled.

2. On the **View Entire Nomination** screen (Figure 1), click **View PDF**. The nomination displays in PDF format in a new window (Figure 2).

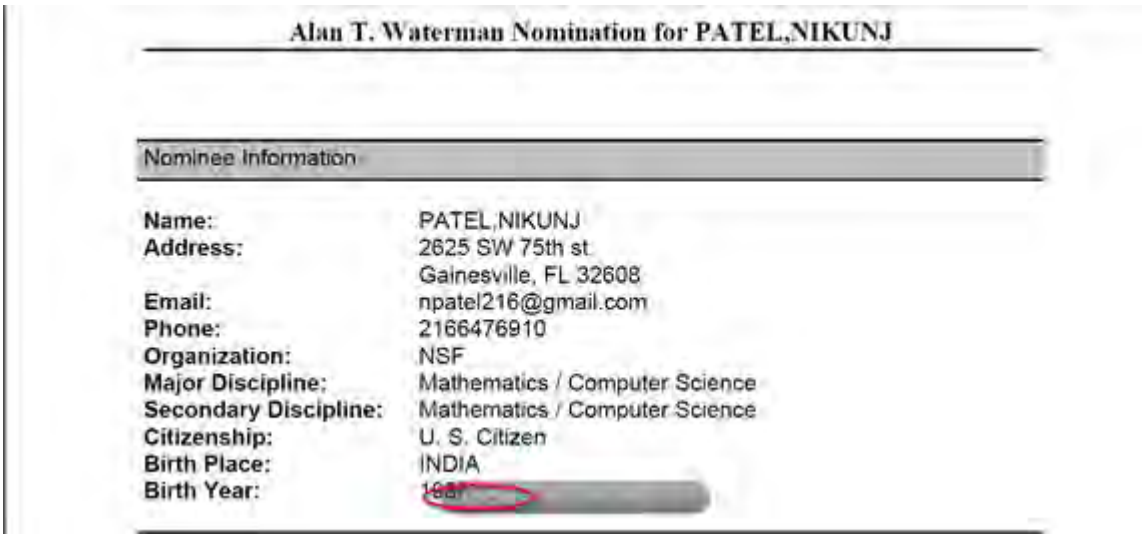


Figure 2 Nomination in PDF format in a new window. The Save and Print icons are circled.

3. Click the **Save** icon (Figure 2) to save the nomination to your computer.
4. Click the **Print** icon (Figure 2) to print the nomination.

View the Status of a Reference for the Alan T. Waterman Award

1. Access the **Honorary Awards** screen (Figure 1) (see Log In to Honorary Awards).

Figure 1 Honorary Awards screen. The Alan T. Waterman Award link is circled.

2. On the **Honorary Awards** screen (Figure 1), click **Alan T. Waterman Award**. The **Alan T. Waterman Award** screen displays (Figure 2).

Figure 2 Alan T. Waterman Award screen. The View Reference Status link is circled.

3. Click **View Reference Status** (Figure 2). The **View Reference Status List** screen displays (Figure 3) with the references listed with their status listed as Received or Not yet Received.

Figure 2 View Reference Status List screen.

Reference for Waterman Award

Prepare a Reference for a Nominee for the Alan T. Waterman Award

In preparing and submitting a reference for a nominee for the Alan T. Waterman Award, you can conduct the following activities:

- Complete the Reference Form
- Submit a reference
- Save a reference
- Edit a saved reference
- View the entire reference
- View the reference in PDF format
- Submit a saved reference

Prepare a Reference for a Nominee for the Alan T. Waterman Award

In preparing and submitting a reference for a nominee for the Alan T. Waterman Award, you can conduct the following activities:

- Complete the Reference Form
- Submit a reference
- Save a reference
- Edit a saved reference
- View the entire reference
- View the reference in PDF format
- Submit a saved reference

Complete the Reference Form for the Alan T. Waterman Award

To prepare a reference for the Waterman Award, you must first register for Honorary Awards. See Register for Honorary Awards.

1. Access the **Honorary Awards** screen (Figure 1) (see Register for Honorary Awards or Log In to Honorary Awards).

Figure 1 Honorary Awards screen. The Alan T. Waterman Award link is circled.

2. On the **Honorary Awards** screen (Figure 1), click **Alan T. Waterman Award**. The **Alan T. Waterman Award** screen displays (Figure 2).

Figure 2 Alan T. Waterman Award screen. The Prepare a New Reference tab is circled.

3. Click the **Prepare a New Reference** tab (Figure 2). The **Instructions for Preparing a Reference** screen displays (Figure 3).

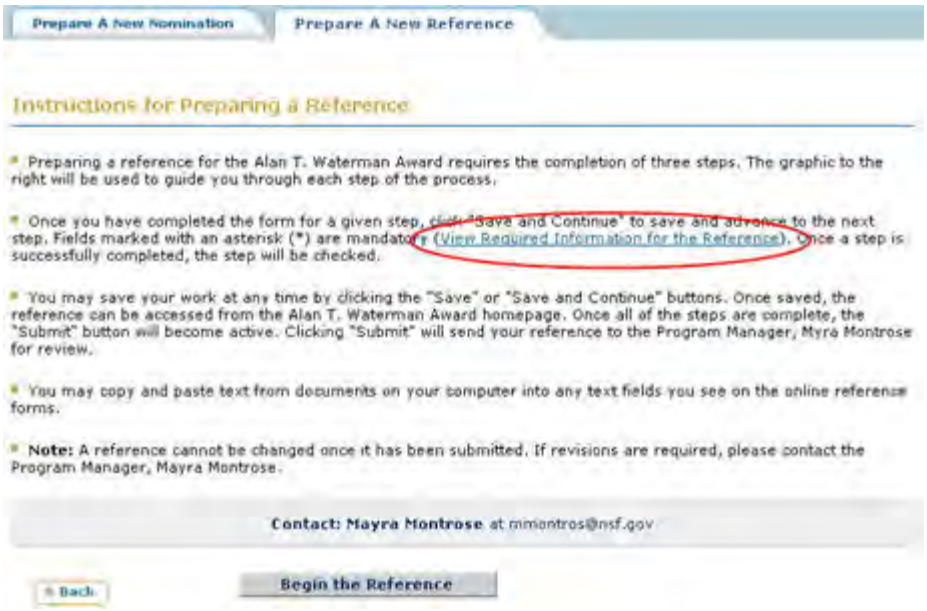


Figure 3 Instructions for Preparing a Reference screen. The View Required Information for the Reference link is circled.

4. To see the form requirements, click **View Required Information for the Reference** (Figure 3). The **Required Information for the Reference** screen displays (Figure 4) with a listing of all the components of the reference.

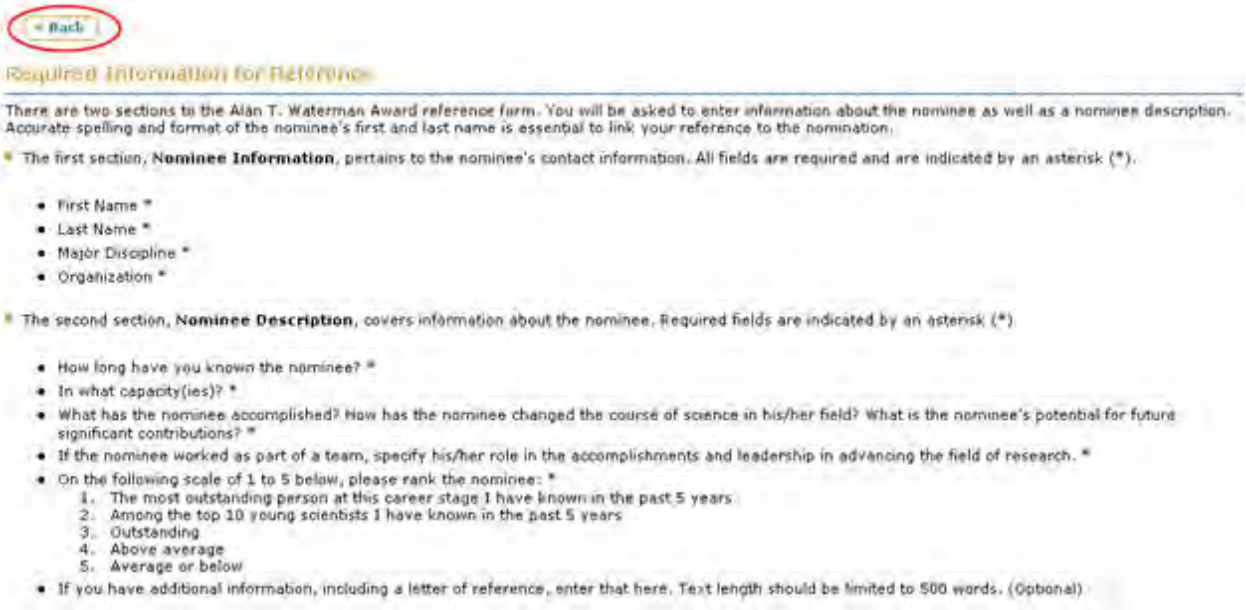


Figure 4 Required Information for Reference screen. The Back button is circled.

5. Click the **Back** button (Figure 4). The **Instructions for Preparing a Reference** screen displays (Figure 5).

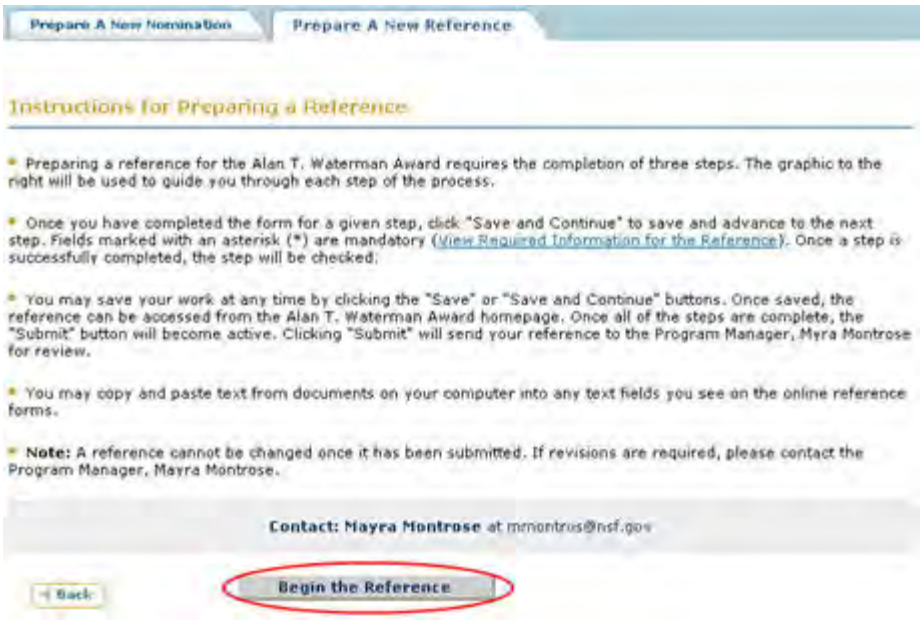


Figure 5 Instructions for Preparing a Reference screen. The Begin the Reference button is circled.

6. Click the **Begin the Reference** button (Figure 5). The **Reference Form** screen displays (Figure 6) with the **Nominee Information** section open.

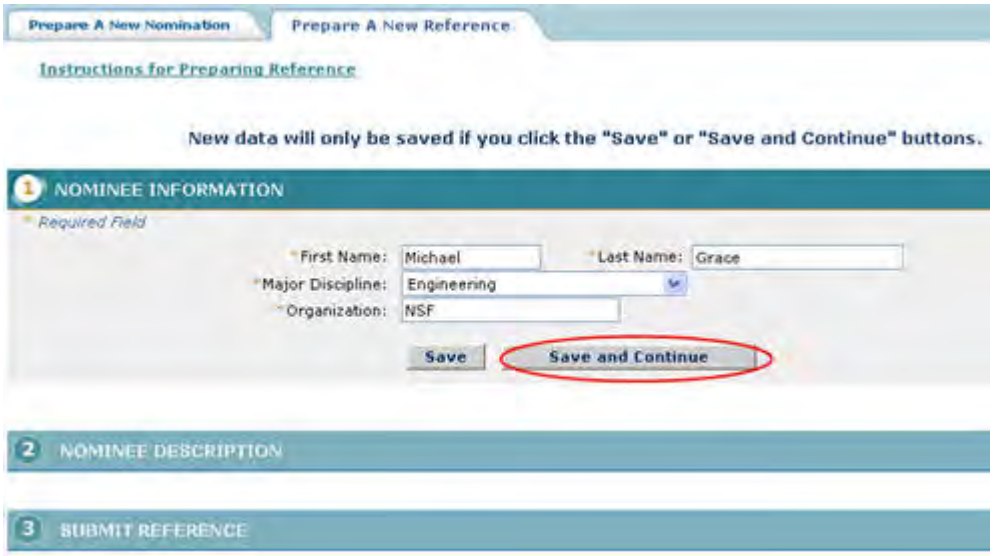


Figure 6 Reference Form screen with the Nominee Information section open. The Save and Continue button is circled.

7. Enter the required information in the appropriate boxes (Figure 6):
   - First name
   - Last name
   - Major discipline
   - Organization

8. Click the **Save and Continue** button (Figure 6). **The Reference Form** screen displays (Figure 7) with the **Nominee Description** section open.

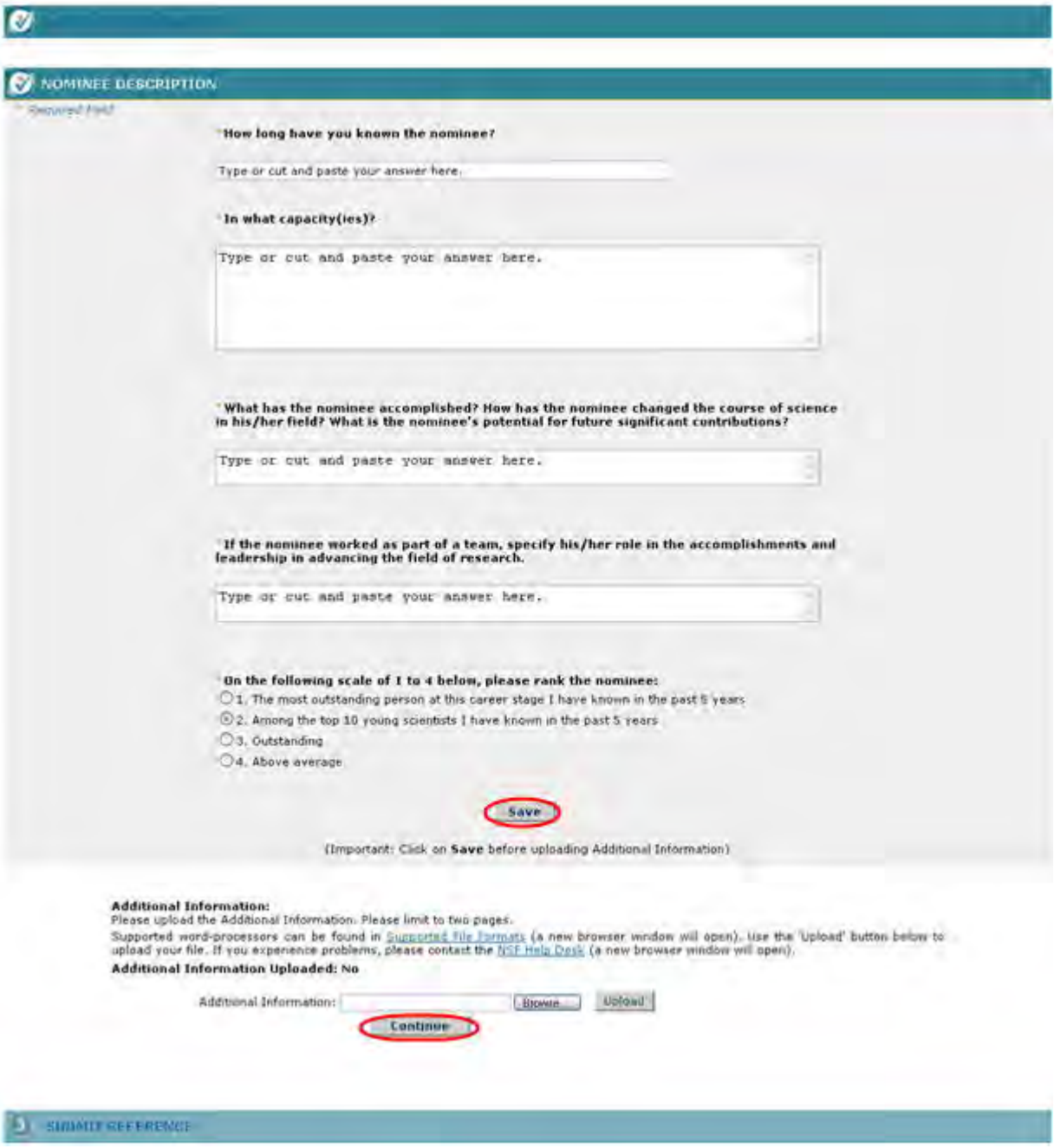


Figure 7 Reference Form screen with the Nominee Description section open. The Save and Continue buttons are circled.

9. In the **How long have you know the nominee** box (Figure 7), type the number of years you have known the nominee.
10. In the **What Capacity** box (Figure 7), type a description of the capacity in which you have known the nominee.

11. In the **What has the nominee accomplished** box (Figure 7), type a description of the nominee's accomplishments and how they have changed the nominee's field of research.
12. In the **If the nominee worked as part of a team** box (Figure 7), type a description of the nominee's leadership role.
13. In the **Ratings** section (Figure 7), click a radio button to rate the nominee on the scale given.
14. In the **Additional Information** section (Figure 7), upload any additional information you would like to submit regarding the nominee, including a letter of reference. Please note: this section is optional and on should save before uploading any information.

You have now completed the Reference Form. You have these options:

- Save the reference to edit it or submit it later
- Submit the reference

Submit a Reference for the Alan T. Waterman Award

1. Access the **Reference Form** screen (Figure 1) with the **Submit Reference** section open (see Complete the Reference Form).

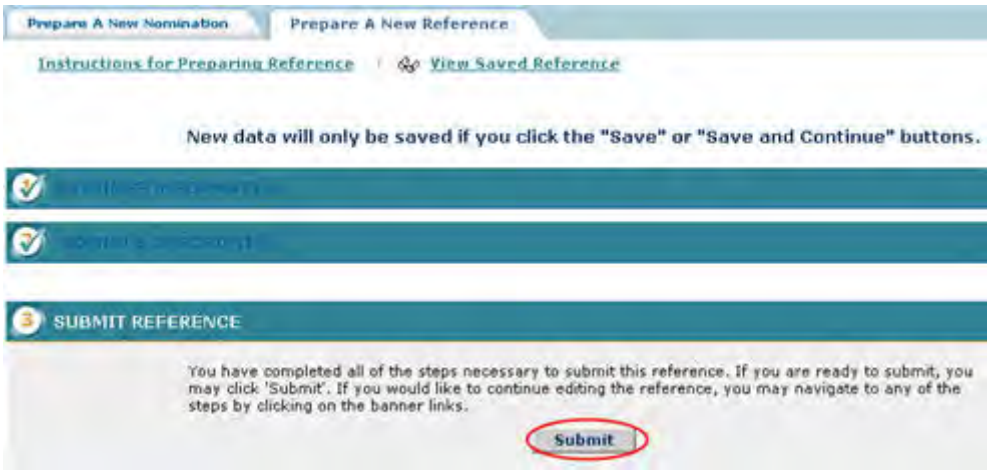


Figure 1 Reference Form screen. The Submit button is circled.

2. On the **Reference Form** screen (Figure 1), click the **Submit** button. The **Confirm Award Reference Submission** screen displays (Figure 2).

Figure 2 Confirm Award Reference Submission screen. The Confirm button is circled.

3. Click the **Confirm** button (Figure 2). The **Confirmation** screen displays (Figure 3).

Figure 3 Confirmation screen.

4. Click the **Back to Award Homepage** (Figure 3). The **Alan T. Waterman Award** screen displays (Figure 4) with the reference listed with the status of Submitted.

Figure 4 Alan T. Waterman Award screen with the reference listed with the status of Submitted.

Save a Reference for the Alan T. Waterman Award

After you have completed at least the first section of a reference, you can save it for future work.

1. Access the **Reference Form** screen (Figure 1) and complete at least the first section of the reference (see Complete the Reference Form).

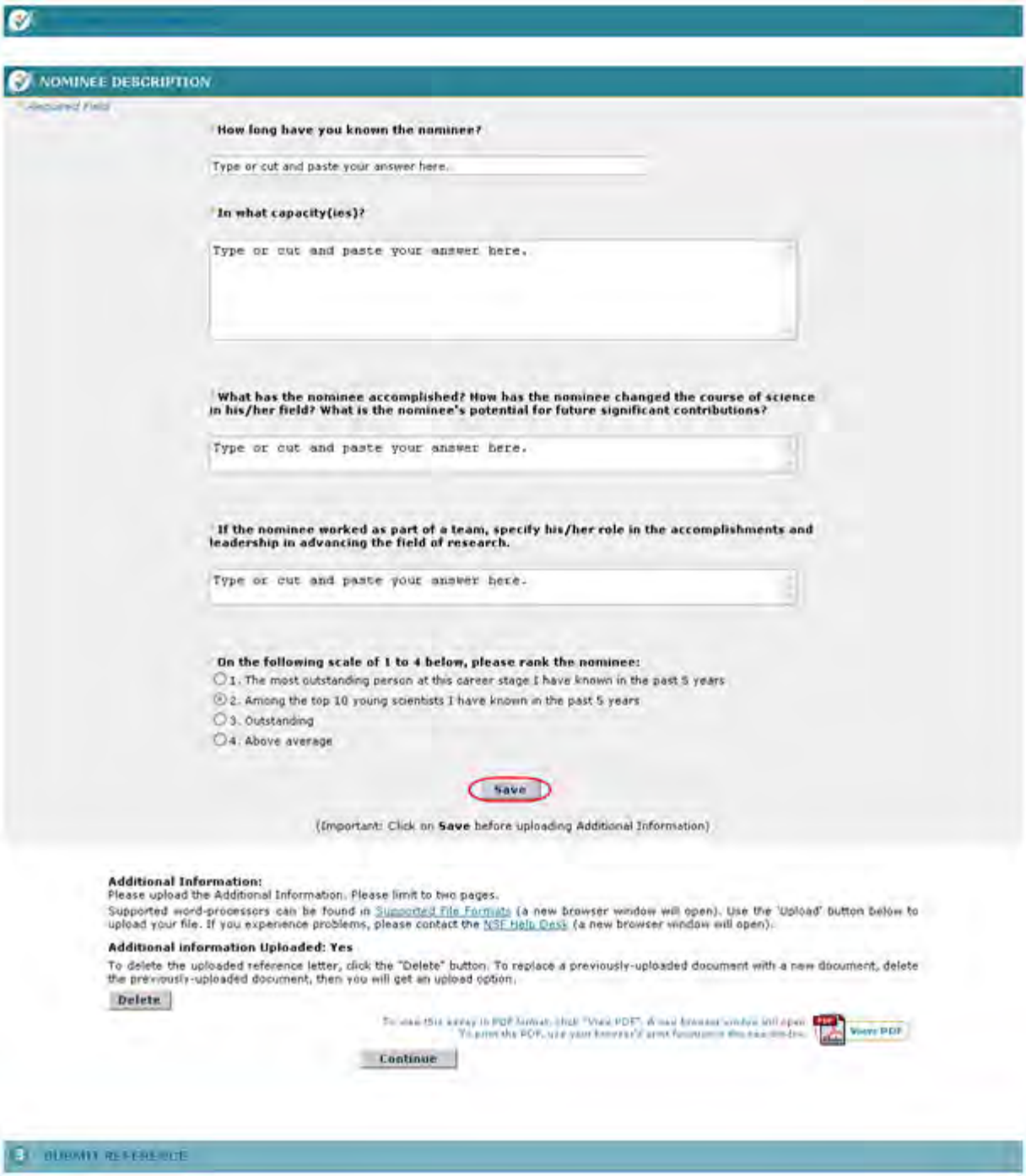


Figure 1 Reference Form screen. The Save button is circled.

2. On the **Reference Form** screen (Figure 1), click the **Save** button. The reference is now listed on the **Alan T. Waterman Award** screen (Figure 2) with the status of In Progress.

Figure 2 Alan T. Waterman Award screen. The reference is now listed with the status of In Progress.

Edit a Saved Reference for the Alan T. Waterman Award

1. Access the **Honorary Awards** screen (Figure 1) (see Log In to Honorary Awards).

Figure 1 Honorary Awards screen. The Alan T. Waterman Award link is circled.

2. On the **Honorary Awards** screen (Figure 1), click **Alan T. Waterman Award**. The **Alan T. Waterman Award** screen displays (Figure 2) with the reference listed with a status of **In Progress**.

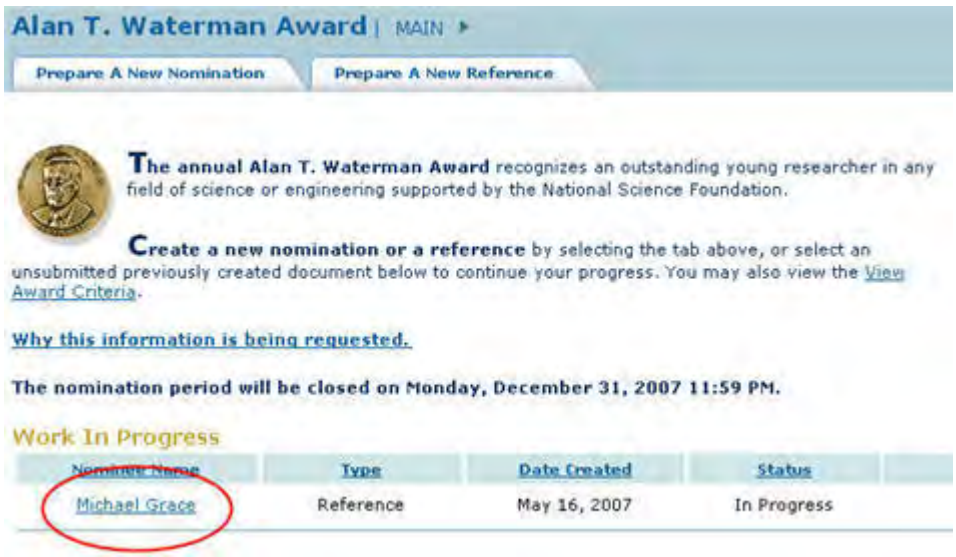


Figure 2 Alan T. Waterman Award screen. The Reference title link is circled.

3. Click the title of the reference (Figure 2). The **Reference Form** screen displays (Figure 3). On this screen, you can edit any section by clicking on the section title and then

clicking the **Save and Continue** button or **Save** button (see Complete the Reference Form, Step 7 through Step 13, for detailed instructions on each section).

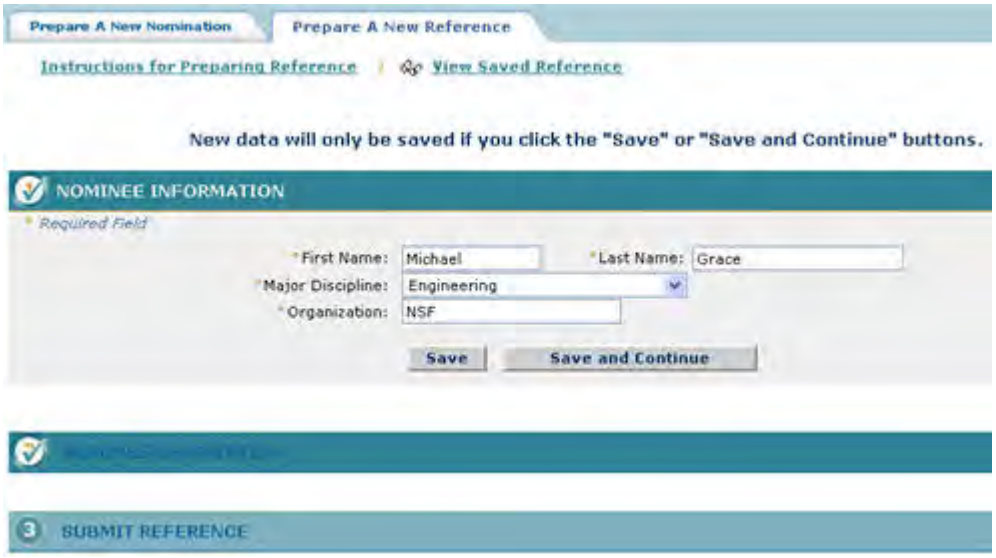


Figure 3 Reference Form screen.

Submit a Saved Reference for the Alan T. Waterman Award

1. Access the **Honorary Awards** screen (Figure 1) (see Log In to Honorary Awards).

Figure 1 Honorary Awards screen. The Alan T. Waterman Award link is circled.

2. On the **Honorary Awards** screen (Figure 1), click **Alan T. Waterman Award**. The **Alan T. Waterman Award** screen displays (Figure 2) with the reference listed in the **Work in Progress** section.

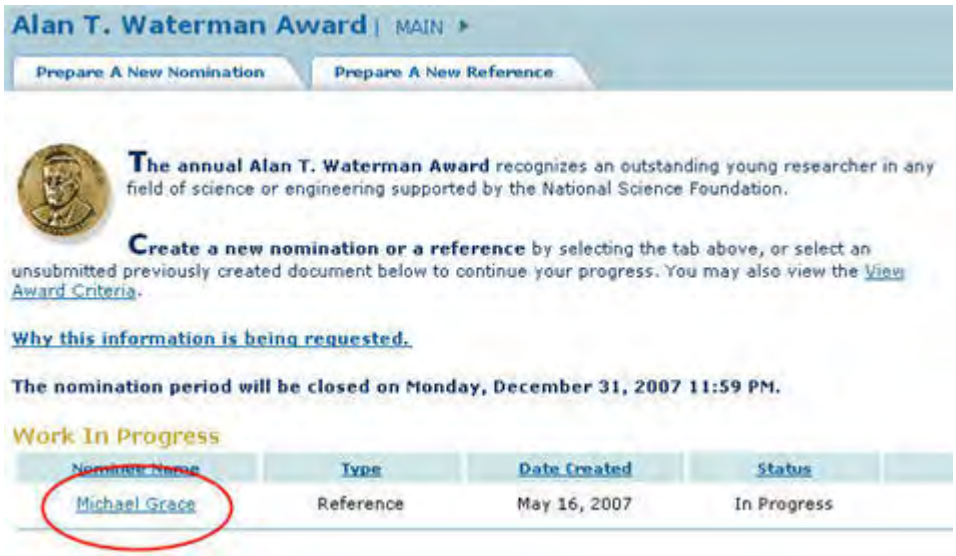


Figure 2 Alan T. Waterman Award screen. The Reference title link is circled.

3. Click the title of the reference (Figure 2). The **Reference Form** screen displays (Figure 3).

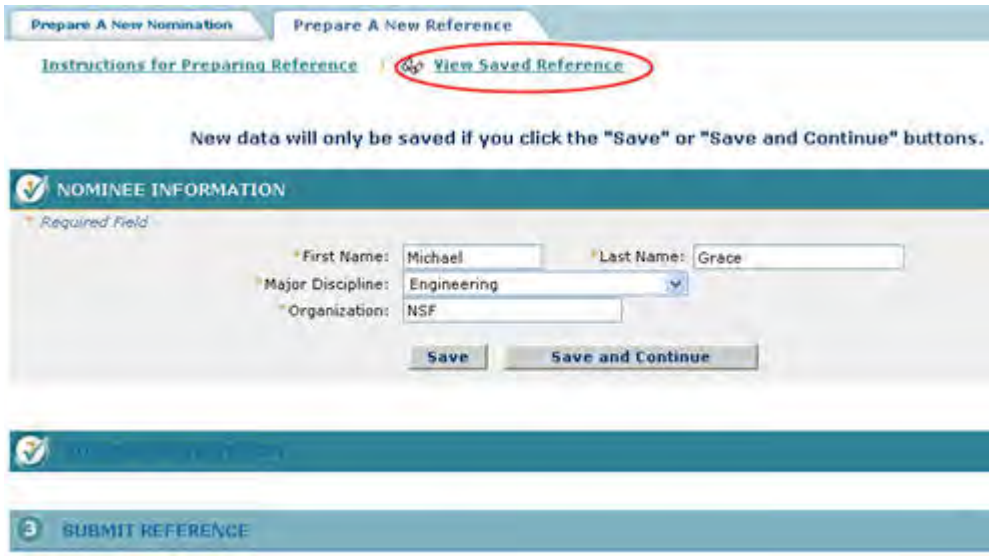


Figure 3 Reference Form screen. The View Saved Reference link is circled.

4. Click **View Saved Reference** (Figure 3). The **View Entire Reference** screen displays (Figure 4).

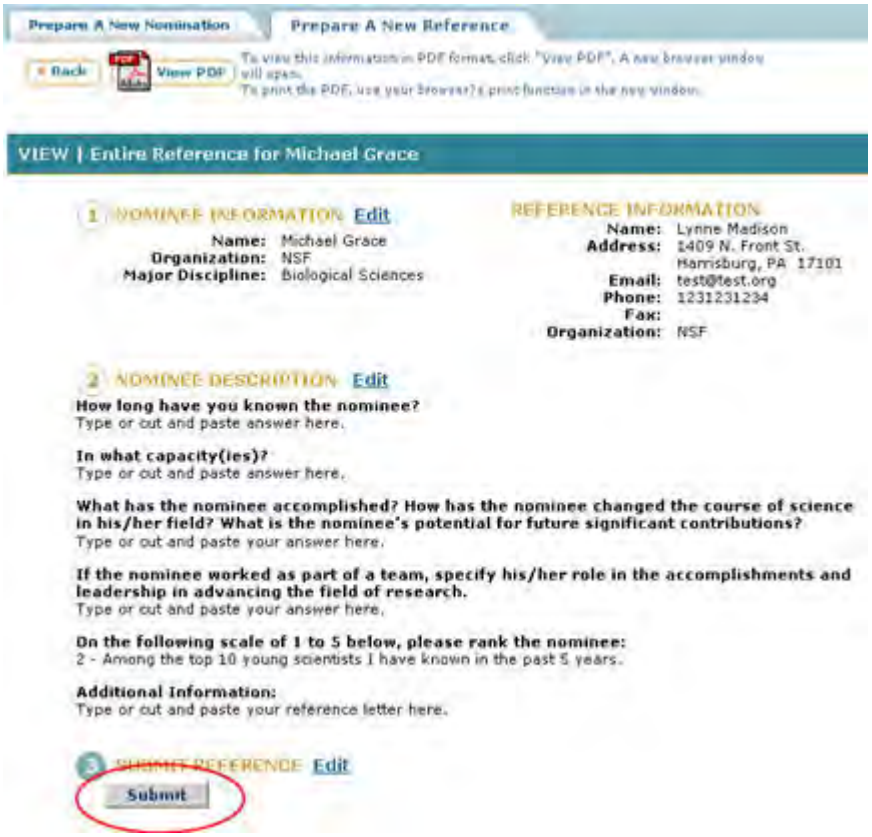


Figure 4 View Entire Reference screen. The Submit button is circled.

5. Click the **Submit** button (Figure 4). The **Confirm Award Reference Submission** screen displays (Figure 5).

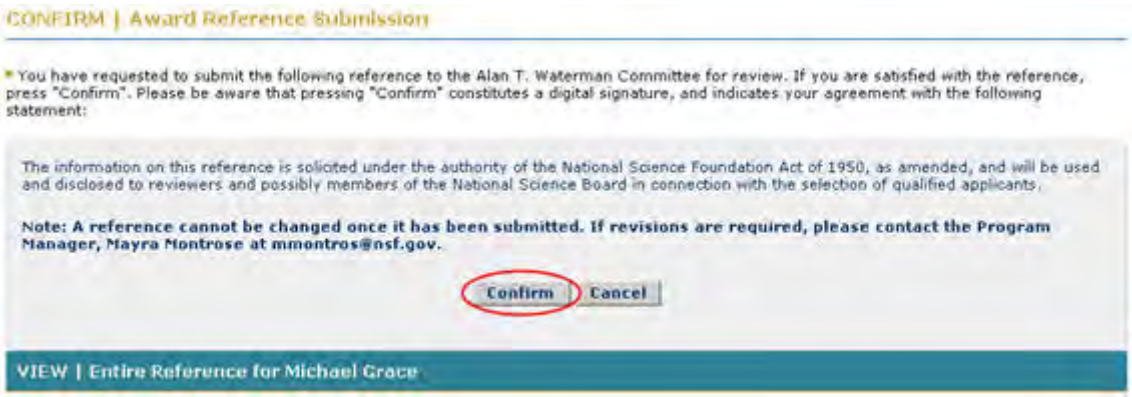


Figure 5 Confirm Award Reference Submission screen. The Confirm button is circled.

6. Click the **Confirm** button (Figure 5). The **Confirmation** screen displays (Figure 6).

Figure 6 Confirmation screen.

7. Click **Back to Award Homepage** (Figure 6). The **Alan T. Waterman Award** screen displays (Figure 7) with the reference listed with the status of **Submitted**.

Figure 7 Alan T. Waterman Award screen with the Reference listed with the status of Submitted.

View the Entire Reference for the Alan T. Waterman Award

1. Access the **Honorary Awards** screen (Figure 1) (see Log In to Honorary Awards).

Figure 1 Honorary Awards screen. The Alan T. Waterman Award link is circled.

2. On the **Honorary Awards** screen (Figure 1), click **Alan T. Waterman Award**. The **Alan T. Waterman Award** screen displays (Figure 2).

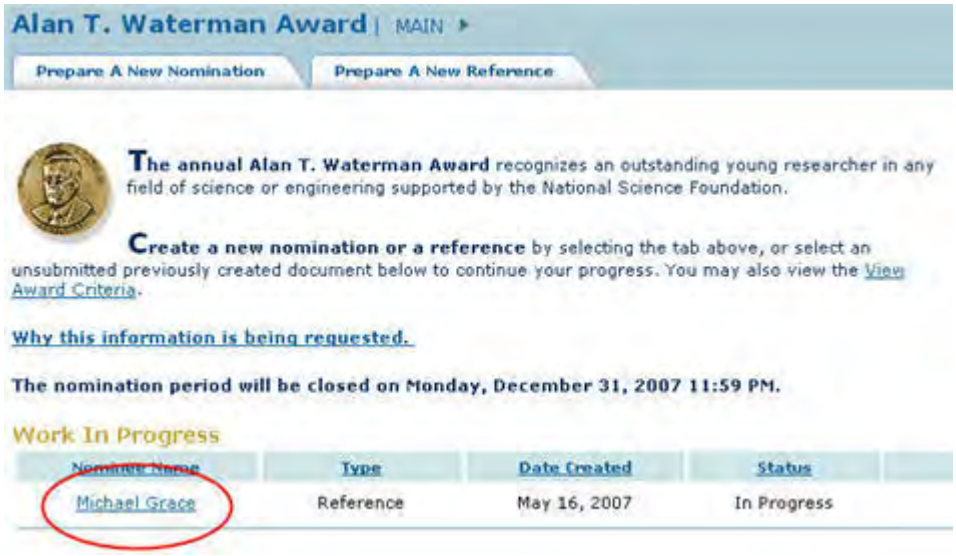


Figure 2 Alan T. Waterman Award screen. The Reference title link is circled.

3. Click the title of the reference (Figure 2). The **Reference Form** screen displays (Figure 3).

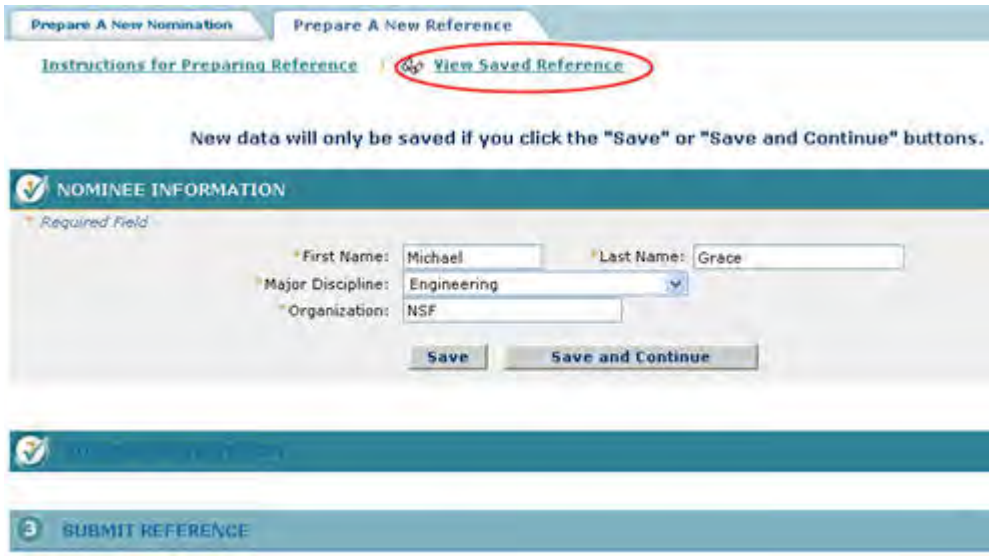


Figure 3 Reference Form screen. The View Saved Reference link is circled.

4. Click **View Saved Reference** (Figure 3). The **View Entire Reference** screen displays with the text you have entered (Figure 4).

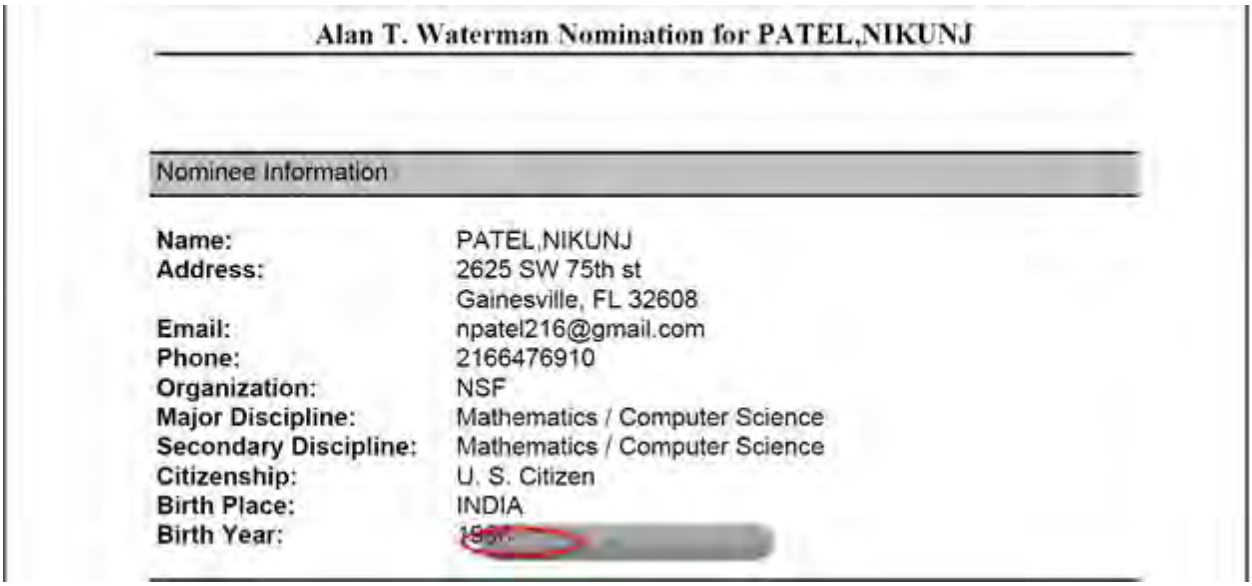
Figure 4 View Entire Reference screen.

View the Reference in PDF for the Alan T. Waterman Award

1. Access the **View Entire Reference** screen (Figure 1) (see View Entire Reference).

Figure 1 View Entire Reference screen. The View PDF link is circled.

2. On the **View Entire Reference** screen (Figure 1), click **View PDF**. The reference displays in PDF format in a new window (Figure 2).



Alan T. Waterman Nomination for PATEL,NIKUNJ

Nominee Information

Name:	PATEL,NIKUNJ
Address:	2625 SW 75th st Gainesville, FL 32608
Email:	npatel216@gmail.com
Phone:	2166476910
Organization:	NSF
Major Discipline:	Mathematics / Computer Science
Secondary Discipline:	Mathematics / Computer Science
Citizenship:	U. S. Citizen
Birth Place:	INDIA
Birth Year:	1969

Figure 2 Reference in PDF format in a new window. The Save and Print icons are circled.

3. Click the **Save** icon (Figure 2) to save the reference to your computer.
4. Click the **Print** icon (Figure 2) to print the reference.

National Medal of Science

National Medal of Science Introduction

The National Medal of Science is awarded to individuals "deserving of special recognition by reason of their outstanding contributions to knowledge in the physical, biological, mathematical, engineering, or social and behavioral sciences."

You have the following options in preparing a National Medal of Science:

- View the award considerations
- Find background information on the award
- Get the listing of the award's past winners
- Prepare a nomination for the award

If you have been designated to write a letter of support for a nominee for the National Medal of Science, see Prepare a National Medal of Science Letter of Support.

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View Award Considerations for National Medal of Science Award

1. Access the **Honorary Awards** screen (Figure 1) (see Register for Honorary Awards or Log In to Honorary Awards).

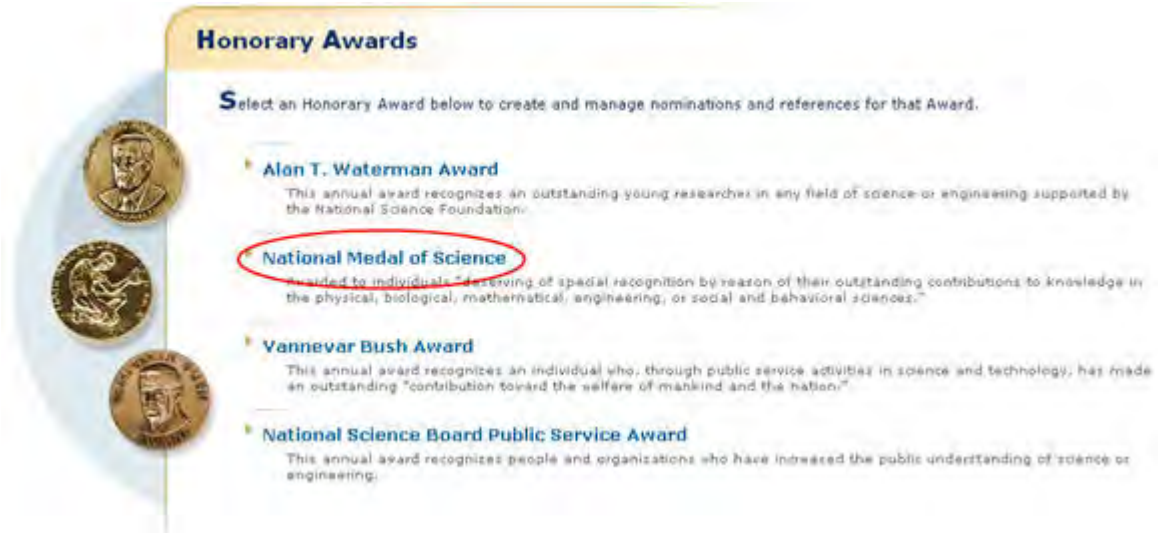


Figure 1 Honorary Awards screen. The National Medal of Science link is circled.

2. On the **Honorary Awards** screen (Figure 1), click **National Medal of Science**. The **National Medal of Science** screen displays (Figure 2).

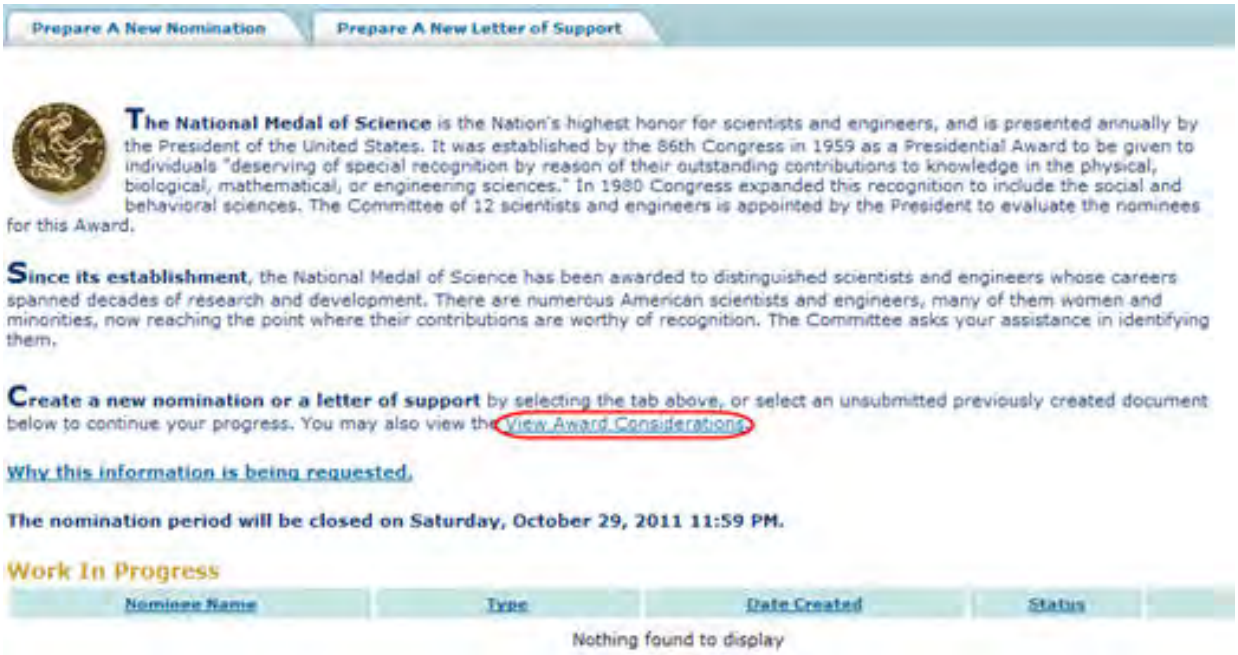
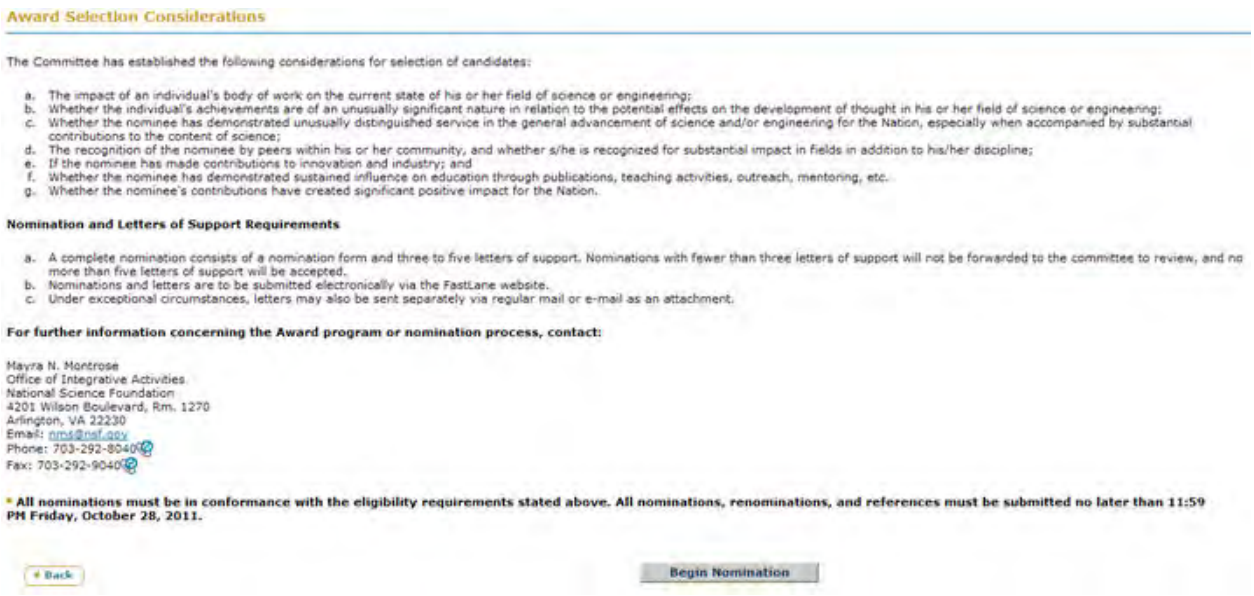


Figure 2 National Medal of Science screen. The View Award Considerations link is circled.

3. Click **View Award Considerations** (Figure 2). The **Award Selection Considerations** screen displays (Figure 3) with the formal award considerations for the award.



Award Selection Considerations

The Committee has established the following considerations for selection of candidates:

a. The impact of an individual's body of work on the current state of his or her field of science or engineering;
b. Whether the individual's achievements are of an unusually significant nature in relation to the potential effects on the development of thought in his or her field of science or engineering;
c. Whether the nominee has demonstrated unusually distinguished service in the general advancement of science and/or engineering for the Nation, especially when accompanied by substantial contributions to the content of science;
d. The recognition of the nominee by peers within his or her community, and whether s/he is recognized for substantial impact in fields in addition to his/her discipline;
e. If the nominee has made contributions to innovation and industry; and
f. Whether the nominee has demonstrated sustained influence on education through publications, teaching activities, outreach, mentoring, etc.
g. Whether the nominee's contributions have created significant positive impact for the Nation.

Nomination and Letters of Support Requirements

a. A complete nomination consists of a nomination form and three to five letters of support. Nominations with fewer than three letters of support will not be forwarded to the committee to review, and no more than five letters of support will be accepted.
b. Nominations and letters are to be submitted electronically via the FastLane website.
c. Under exceptional circumstances, letters may also be sent separately via regular mail or e-mail as an attachment.

For further information concerning the Award program or nomination process, contact:

Mayra N. Montrose
Office of Integrative Activities
National Science Foundation
4201 Wilson Boulevard, Rm. 1270
Arlington, VA 22230
Email: nms@nsf.gov
Phone: 703-292-8040
Fax: 703-292-9040

*** All nominations must be in conformance with the eligibility requirements stated above. All nominations, renominations, and references must be submitted no later than 11:59 PM Friday, October 28, 2011.**

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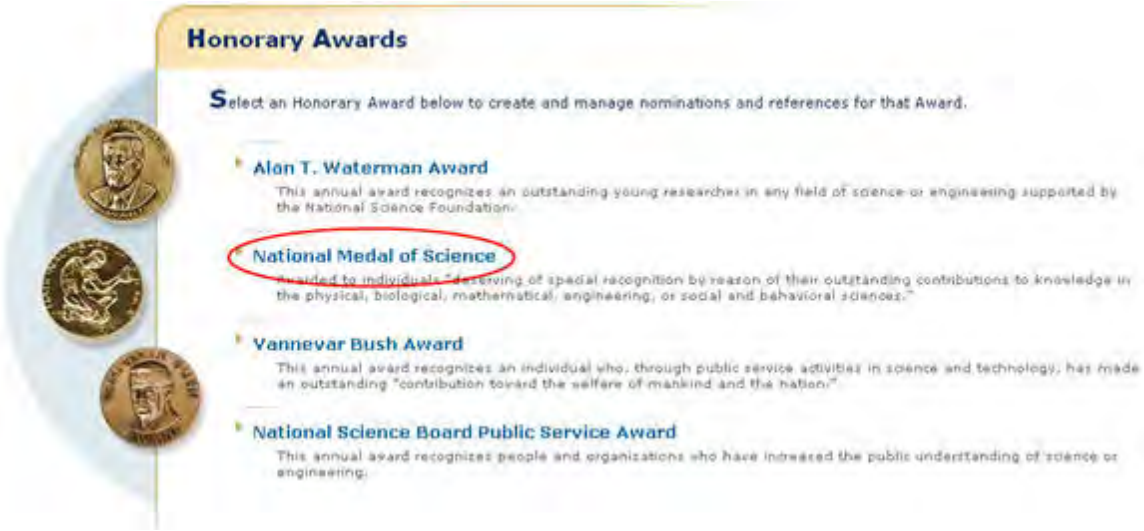
Begin Nomination

Figure 3 Award Selection Considerations screen.

Find Background Information on the National Medal of Science Award

1. Access the **Honorary Awards** screen (Figure 1) (see Register for Honorary Awards or Log In to Honorary Awards).



Honorary Awards

Select an Honorary Award below to create and manage nominations and references for that Award.

Alan T. Waterman Award
This annual award recognizes an outstanding young researcher in any field of science or engineering supported by the National Science Foundation.

National Medal of Science
Awarded to individuals "deserving of special recognition by reason of their outstanding contributions to knowledge in the physical, biological, mathematical, engineering, or social and behavioral sciences."

Vannevar Bush Award
This annual award recognizes an individual who, through public service activities in science and technology, has made an outstanding "contribution toward the welfare of mankind and the nation."

National Science Board Public Service Award
This annual award recognizes people and organizations who have increased the public understanding of science or engineering.

Figure 1 Honorary Awards screen. The National Medal of Science link is circled.

2. On the **Honorary Awards** screen (Figure 1), click **National Medal of Science**. The **National Medal of Science** screen displays (Figure 2).

Figure 2 National Medal of Science screen. The Medal of Science Background link is circled.

3. Click **National Medal of Science Award Background** (Figure 2). The **National Medal of Science** screen displays (Figure 3) in a new window with the background information on the award.

Figure 3 President's National Medal of Science screen.

Past Winners of the National Medal of Science

1. Access the **Honorary Awards** screen (Figure 1) (see Register for Honorary Awards or Log In to Honorary Awards).

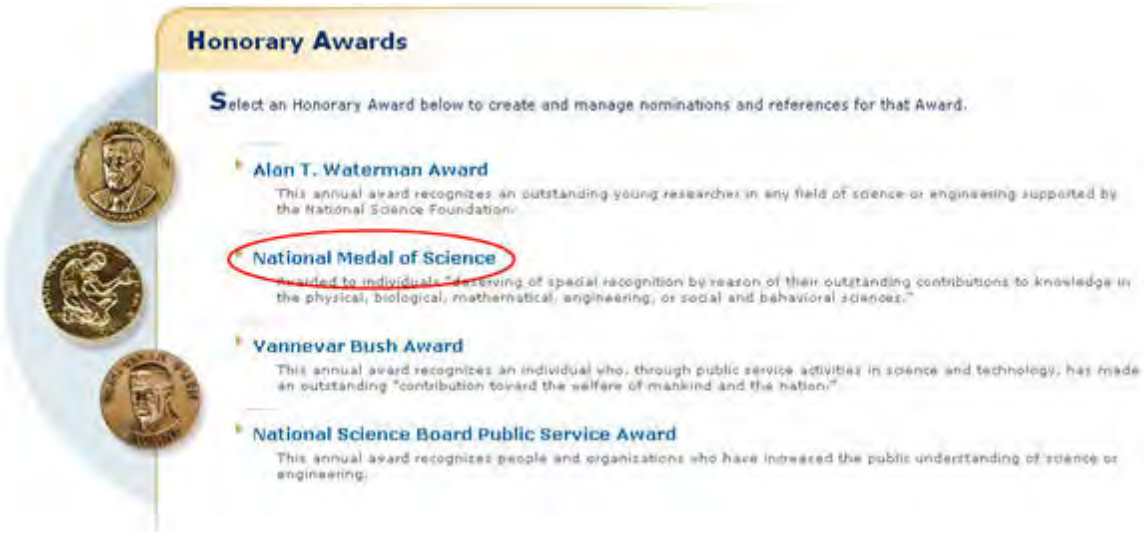


Figure 1 Honorary Awards screen. The National Medal of Science link is circled.

2. On the **Honorary Awards** screen (Figure 1), click **National Medal of Science**. The **National Medal of Science** screen displays (Figure 2).

Figure 2 National Medal of Science screen. The Past Winners link is circled.

3. Click **Past Winners** (Figure 2). The **President's National Medal of Science Recipient** screen displays (Figure 3) in a new window.

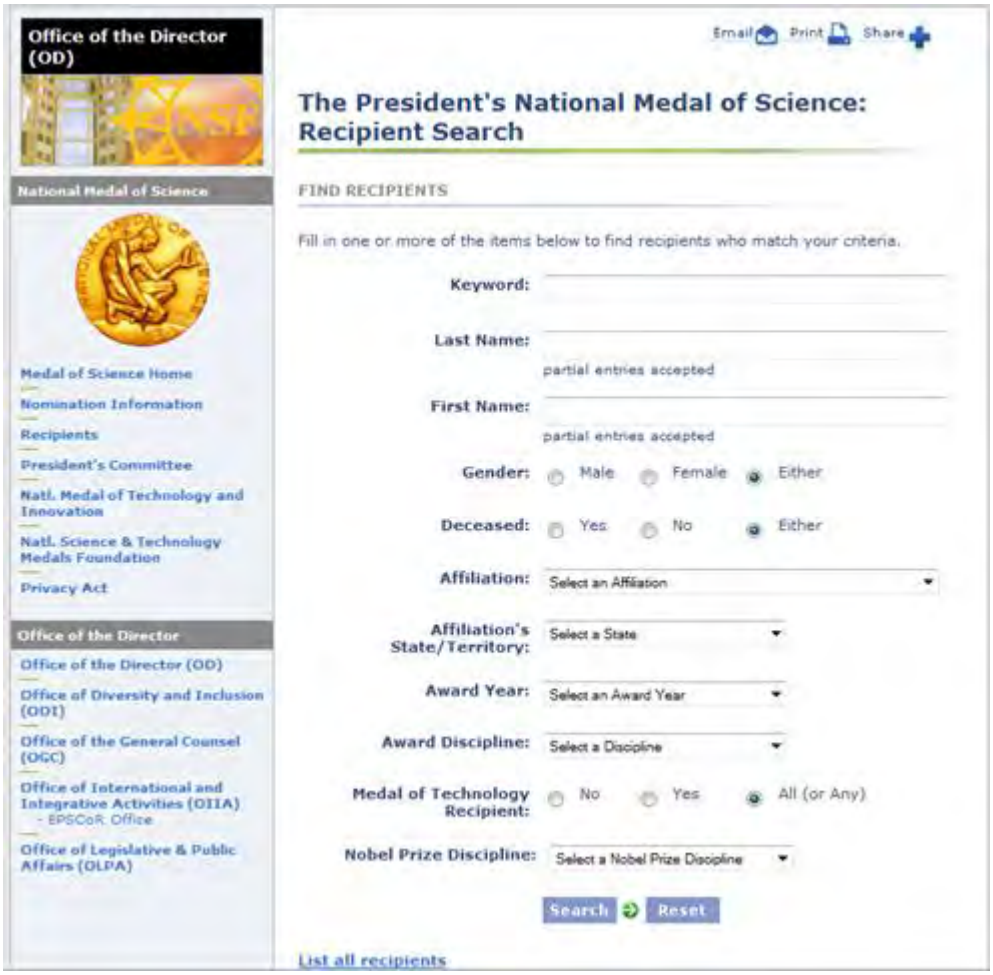


Figure 3 President's National Medal of Science Recipients screen. The Search button is circled.

4. To search for a recipient, enter information for any or all of the search criteria:

- Keyword
- Last Name
- First Name
- Gender
- Deceased
- Affiliation
- Affiliation's State/Territory:
- Award Year
- Award Discipline
- Medal of Technology Recipient
- Nobel Prize Discipline

5. Click the **Search** button (Figure 3). The **President National Medal of Science Recipients** screen displays (Figure 4) with the results of your search.

The President's National Medal of Science Recipients

Click on a column title to sort the results by that field. Click on a name to see more details. Institutions listed are those with which the recipients were affiliated at the time of the Award.

Search Results = 3 Recipients

Name	Affiliation	Discipline	Award Year	Nobel Laureate
Alvarez, Luis W.	University of California at Berkeley	Physical Sciences	1963	Physics
McMillan, Edwin M.	University of California at Berkeley	Physical Sciences	1990	Chemistry
Townes, Charles H.	University of California at Berkeley	Physical Sciences	1982	Physics

Figure 4 President's National Medal of Science Recipients screen with the results of a search.

Nomination for Medal of Science

Prepare a National Medal of Science Nomination

In preparing and submitting a nomination for the National Medal of Science, you can conduct the following activities:

- Complete the Nomination Form
- Submit a nomination
- Save a nomination
- Edit a saved nomination
- View the entire nomination
- View the nomination in PDF format

- Submit a saved nomination
- View the status of a letter of support

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In preparing and submitting a nomination for the National Medal of Science, you can conduct the following activities:

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- View the nomination in PDF format
- Submit a saved nomination
- View the status of a letter of support

Complete the Nomination Form for the National Medal of Science

1. Access the **Honorary Awards** screen (Figure 1) (see Register for Honorary Awards or Log In to Honorary Awards).

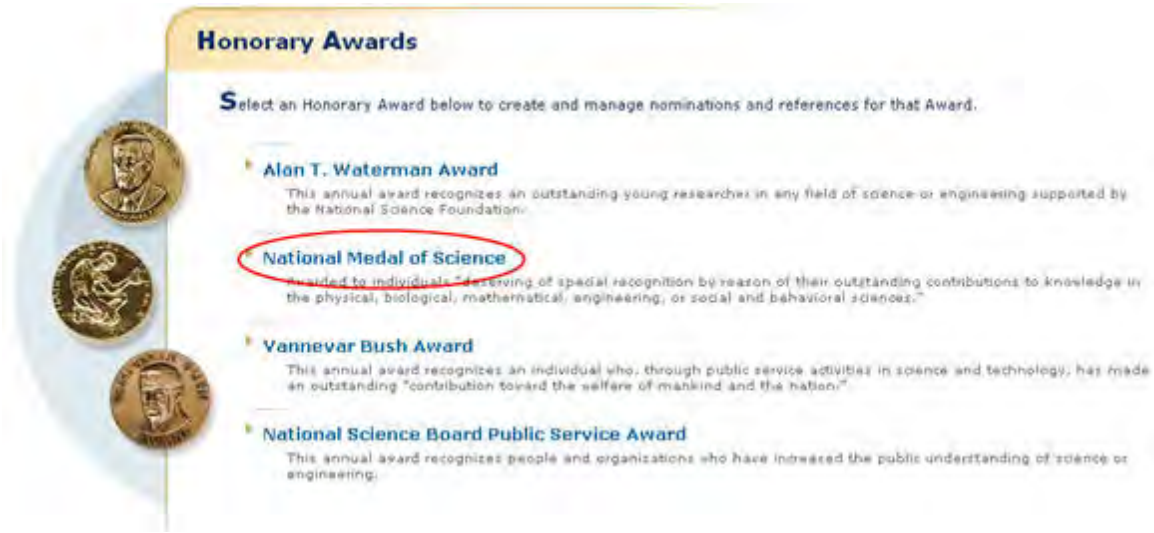


Figure 1 Honorary Awards screen. The National Medal of Science link is circled.

2. On the **Honorary Awards** screen (Figure 1), click **National Medal of Science**. The **National Medal of Science** screen displays (Figure 2).

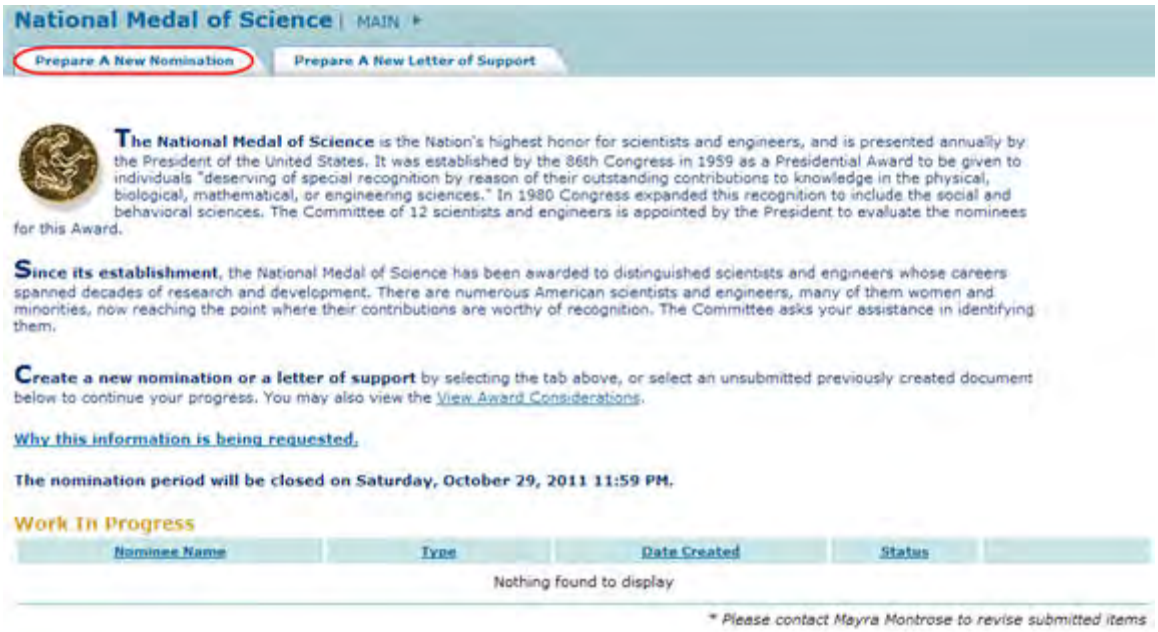
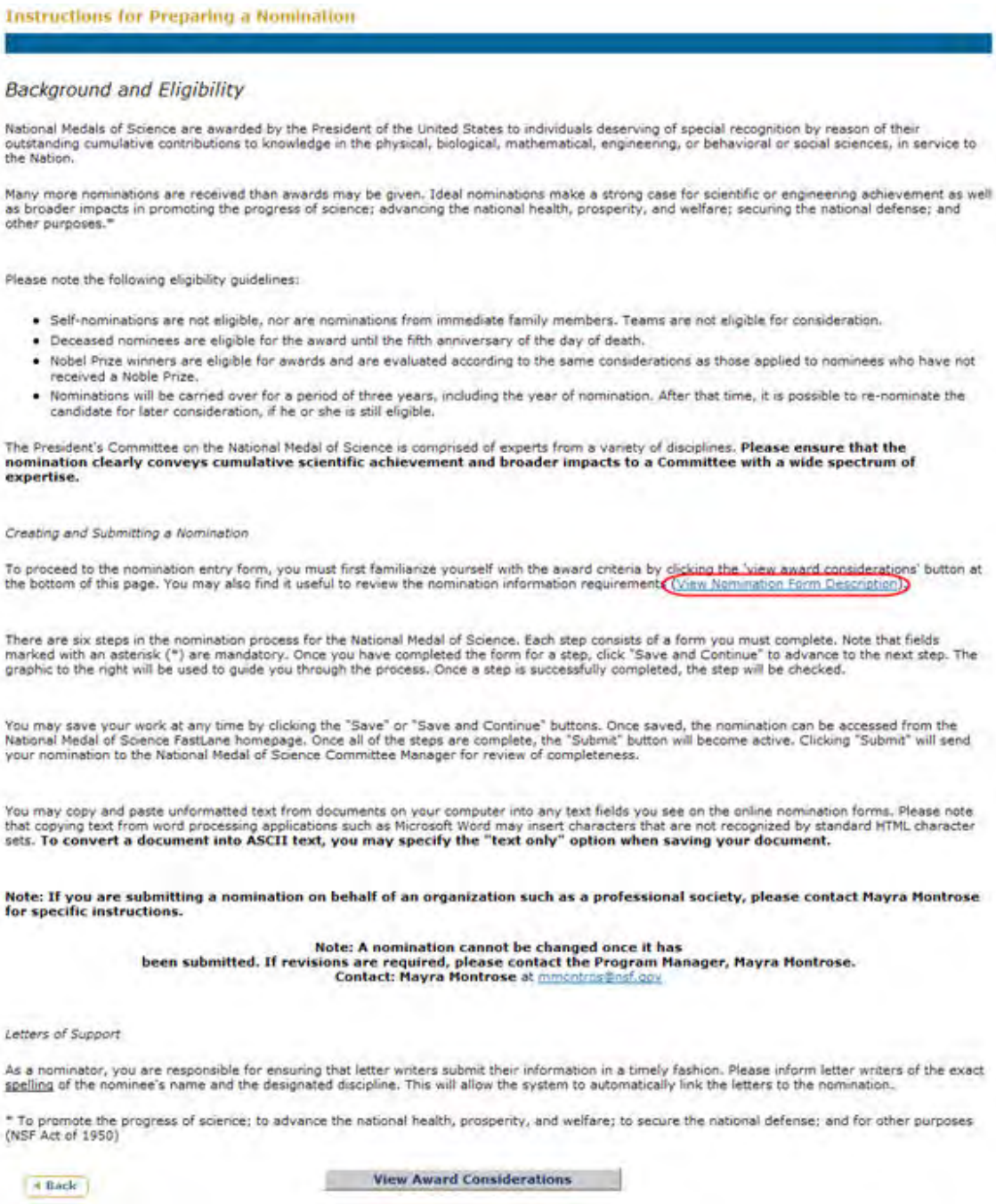


Figure 2 National Medal of Science screen. The Prepare a New Nomination tab is circled.

3. Click the **Prepare a Nomination** tab (Figure 2). The **Instructions for Preparing a Nomination** screen displays (Figure 3) with general instructions for completing a nomination.



Instructions for Preparing a Nomination

Background and Eligibility

National Medals of Science are awarded by the President of the United States to individuals deserving of special recognition by reason of their outstanding cumulative contributions to knowledge in the physical, biological, mathematical, engineering, or behavioral or social sciences, in service to the Nation.

Many more nominations are received than awards may be given. Ideal nominations make a strong case for scientific or engineering achievement as well as broader impacts in promoting the progress of science; advancing the national health, prosperity, and welfare; securing the national defense; and other purposes.*

Please note the following eligibility guidelines:

- Self-nominations are not eligible, nor are nominations from immediate family members. Teams are not eligible for consideration.
- Deceased nominees are eligible for the award until the fifth anniversary of the day of death.
- Nobel Prize winners are eligible for awards and are evaluated according to the same considerations as those applied to nominees who have not received a Noble Prize.
- Nominations will be carried over for a period of three years, including the year of nomination. After that time, it is possible to re-nominate the candidate for later consideration, if he or she is still eligible.

The President's Committee on the National Medal of Science is comprised of experts from a variety of disciplines. **Please ensure that the nomination clearly conveys cumulative scientific achievement and broader impacts to a Committee with a wide spectrum of expertise.**

Creating and Submitting a Nomination

To proceed to the nomination entry form, you must first familiarize yourself with the award criteria by clicking the 'view award considerations' button at the bottom of this page. You may also find it useful to review the nomination information requirements (View Nomination Form Description).

There are six steps in the nomination process for the National Medal of Science. Each step consists of a form you must complete. Note that fields marked with an asterisk (*) are mandatory. Once you have completed the form for a step, click "Save and Continue" to advance to the next step. The graphic to the right will be used to guide you through the process. Once a step is successfully completed, the step will be checked.

You may save your work at any time by clicking the "Save" or "Save and Continue" buttons. Once saved, the nomination can be accessed from the National Medal of Science FastLane homepage. Once all of the steps are complete, the "Submit" button will become active. Clicking "Submit" will send your nomination to the National Medal of Science Committee Manager for review of completeness.

You may copy and paste unformatted text from documents on your computer into any text fields you see on the online nomination forms. Please note that copying text from word processing applications such as Microsoft Word may insert characters that are not recognized by standard HTML character sets. **To convert a document into ASCII text, you may specify the "text only" option when saving your document.**

Note: If you are submitting a nomination on behalf of an organization such as a professional society, please contact Mayra Montrose for specific instructions.

Note: A nomination cannot be changed once it has been submitted. If revisions are required, please contact the Program Manager, Mayra Montrose. Contact: Mayra Montrose at mmontros@nsf.gov

Letters of Support

As a nominator, you are responsible for ensuring that letter writers submit their information in a timely fashion. Please inform letter writers of the exact spelling of the nominee's name and the designated discipline. This will allow the system to automatically link the letters to the nomination.

* To promote the progress of science; to advance the national health, prosperity, and welfare; to secure the national defense; and for other purposes (NSF Act of 1950)

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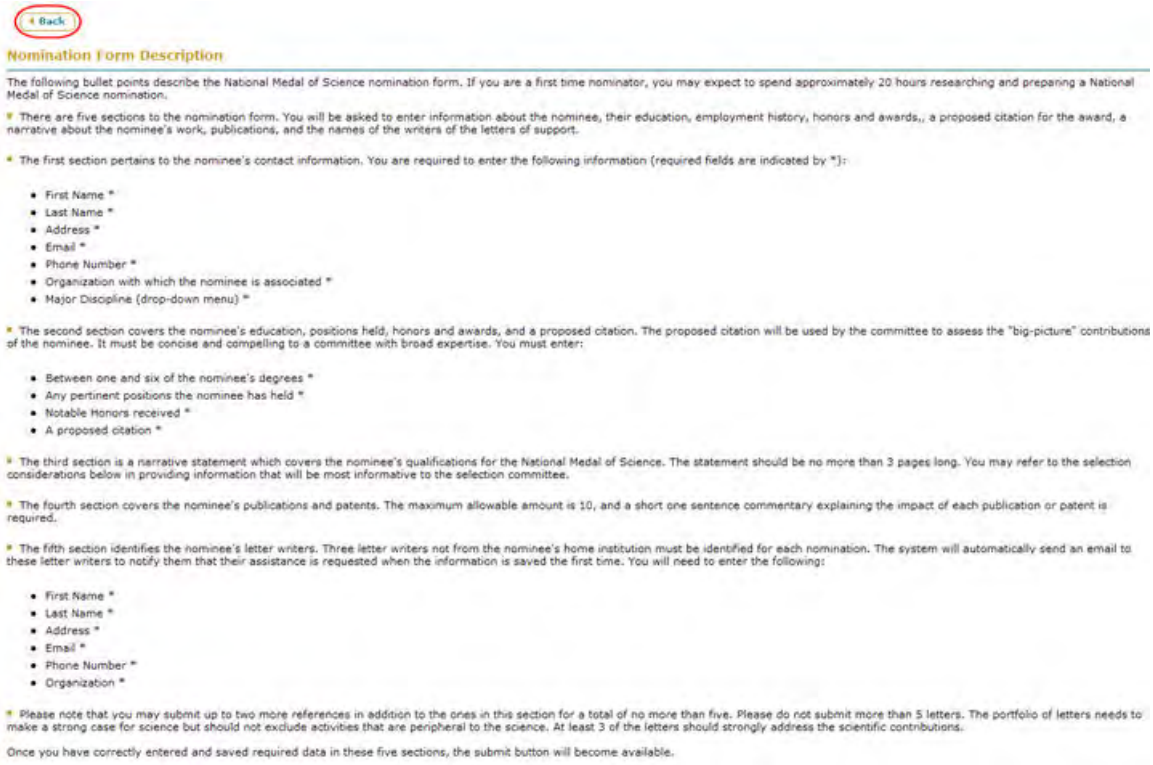
View Award Considerations

Figure 3 Instructions for Preparing a Nomination screen. The View Nomination Form Description link is circled.

4. To see the form requirements, click **View Nomination Form Description** (Figure 3). The **Nomination Form Description** screen displays (Figure 4) with a listing of all the components of the Nomination Form.



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Nomination Form Description

The following bullet points describe the National Medal of Science nomination form. If you are a first time nominator, you may expect to spend approximately 20 hours researching and preparing a National Medal of Science nomination.

- There are five sections to the nomination form. You will be asked to enter information about the nominee, their education, employment history, honors and awards,, a proposed citation for the award, a narrative about the nominee's work, publications, and the names of the writers of the letters of support.

- The first section pertains to the nominee's contact information. You are required to enter the following information (required fields are indicated by *):

  - First Name *
  - Last Name *
  - Address *
  - Email *
  - Phone Number *
  - Organization with which the nominee is associated *
  - Major Discipline (drop-down menu) *

- The second section covers the nominee's education, positions held, honors and awards, and a proposed citation. The proposed citation will be used by the committee to assess the "big-picture" contributions of the nominee. It must be concise and compelling to a committee with broad expertise. You must enter:

  - Between one and six of the nominee's degrees *
  - Any pertinent positions the nominee has held *
  - Notable Honors received *
  - A proposed citation *

- The third section is a narrative statement which covers the nominee's qualifications for the National Medal of Science. The statement should be no more than 3 pages long. You may refer to the selection considerations below in providing information that will be most informative to the selection committee.

- The fourth section covers the nominee's publications and patents. The maximum allowable amount is 10, and a short one sentence commentary explaining the impact of each publication or patent is required.

- The fifth section identifies the nominee's letter writers. Three letter writers not from the nominee's home institution must be identified for each nomination. The system will automatically send an email to these letter writers to notify them that their assistance is requested when the information is saved the first time. You will need to enter the following:

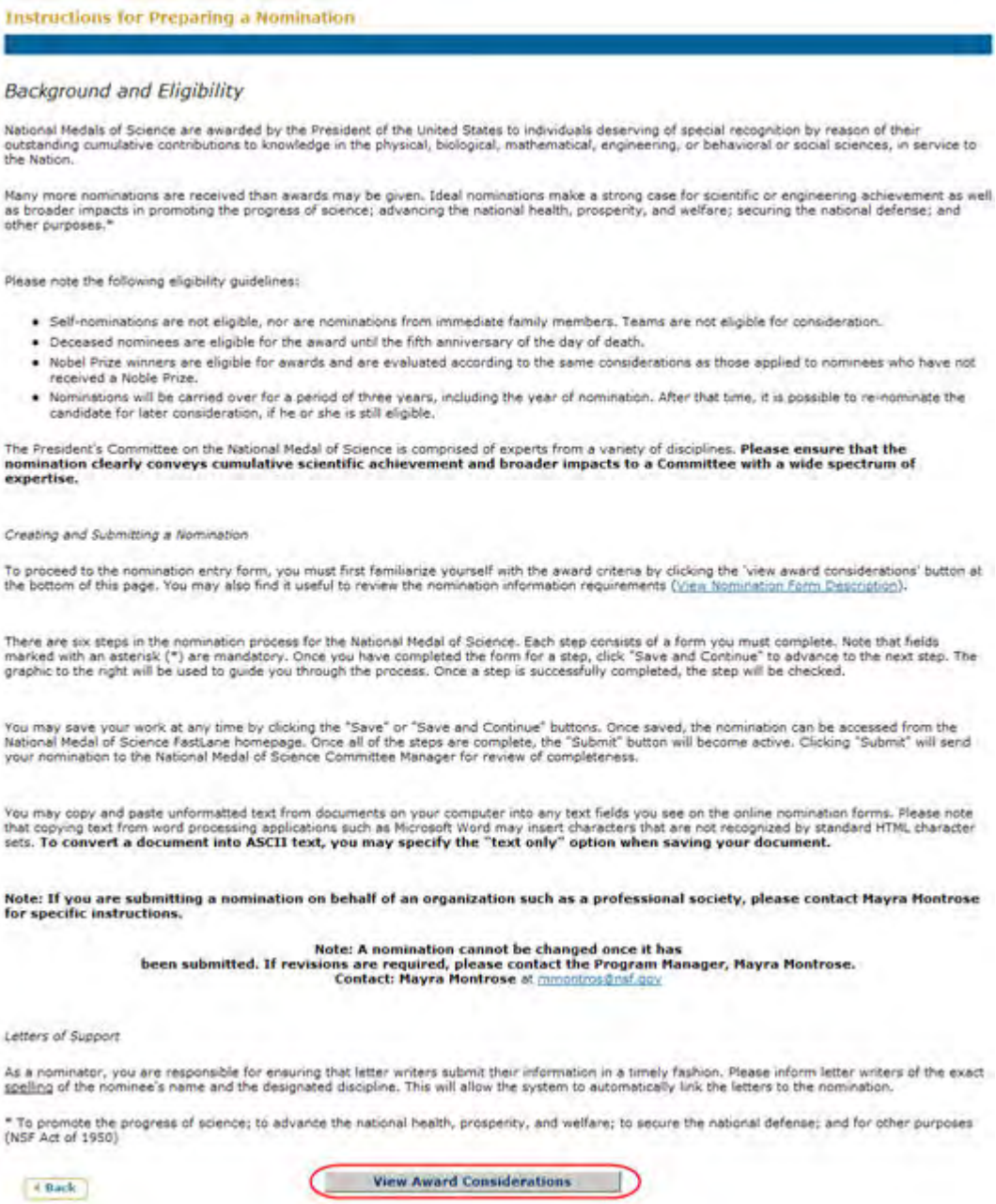
  - First Name *
  - Last Name *
  - Address *
  - Email *
  - Phone Number *
  - Organization *

- Please note that you may submit up to two more references in addition to the ones in this section for a total of no more than five. Please do not submit more than 5 letters. The portfolio of letters needs to make a strong case for science but should not exclude activities that are peripheral to the science. At least 3 of the letters should strongly address the scientific contributions.

Once you have correctly entered and saved required data in these five sections, the submit button will become available.

Figure 4 Nomination Form Description screen. The Back button is circled.

5. Click the **Back** button (Figure 4). The **Instructions for Preparing a Nomination** screen displays (Figure 5).



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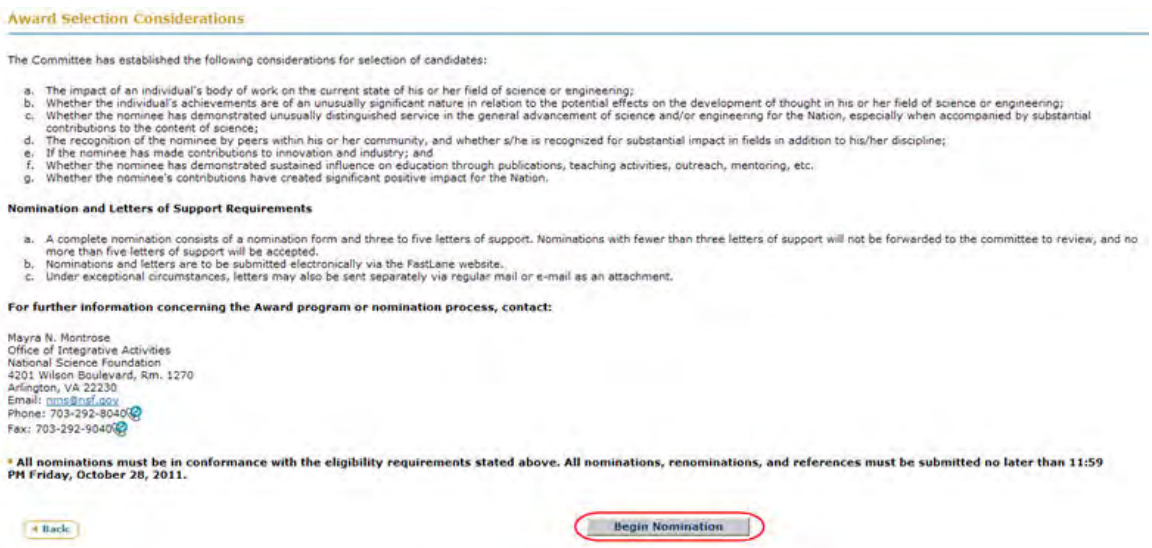
View Award Considerations

Figure 5 Instructions for Preparing a Nomination screen. The View Award Considerations button is circled.

6. Click the **View Award Considerations** button. The **Award Selection Considerations** screen displays (Figure 6).



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a. The impact of an individual's body of work on the current state of his or her field of science or engineering;
b. Whether the individual's achievements are of an unusually significant nature in relation to the potential effects on the development of thought in his or her field of science or engineering;
c. Whether the nominee has demonstrated unusually distinguished service in the general advancement of science and/or engineering for the Nation, especially when accompanied by substantial contributions to the content of science;
d. The recognition of the nominee by peers within his or her community, and whether s/he is recognized for substantial impact in fields in addition to his/her discipline;
e. If the nominee has made contributions to innovation and industry; and
f. Whether the nominee has demonstrated sustained influence on education through publications, teaching activities, outreach, mentoring, etc.
g. Whether the nominee's contributions have created significant positive impact for the Nation.

Nomination and Letters of Support Requirements

a. A complete nomination consists of a nomination form and three to five letters of support. Nominations with fewer than three letters of support will not be forwarded to the committee to review, and no more than five letters of support will be accepted.
b. Nominations and letters are to be submitted electronically via the FastLane website.
c. Under exceptional circumstances, letters may also be sent separately via regular mail or e-mail as an attachment.

For further information concerning the Award program or nomination process, contact:

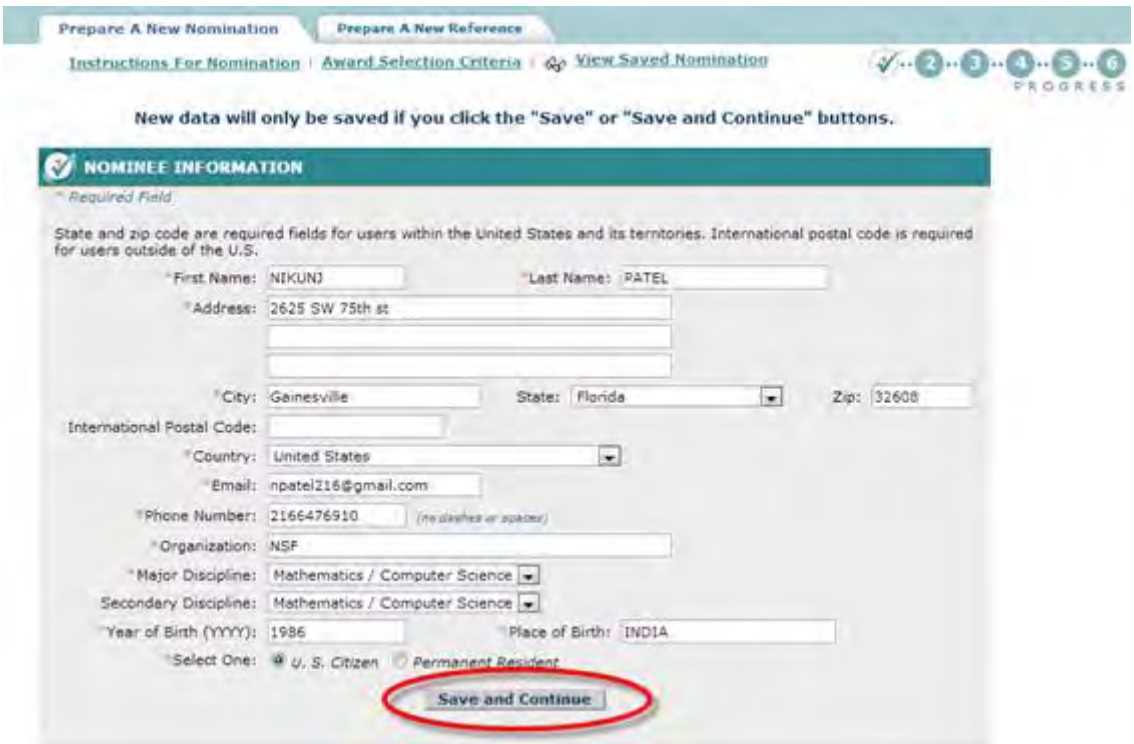
Mayra N. Montrose
Office of Integrative Activities
National Science Foundation
4201 Wilson Boulevard, Rm. 1270
Arlington, VA 22230
Email: nms@nsf.gov
Phone: 703-292-8040
Fax: 703-292-9040

*** All nominations must be in conformance with the eligibility requirements stated above. All nominations, renominations, and references must be submitted no later than 11:59 PM Friday, October 28, 2011.**

Back | Begin Nomination

Figure 6 Award Selection Considerations screen. The Begin Nomination button is circled.

7. Click the **Begin Nomination** button (Figure 6). The **Nomination Form** screen displays (Figure 7) with the **Nomination Information** section open.



Prepare A New Nomination | Prepare A New Reference

Instructions For Nomination | Award Selection Criteria | View Saved Nomination

PROGRESS

New data will only be saved if you click the "Save" or "Save and Continue" buttons.

NOMINEE INFORMATION

* Required Field

State and zip code are required fields for users within the United States and its territories. International postal code is required for users outside of the U.S.

*First Name: NIKUNJ
*Last Name: PATEL
*Address: 2625 SW 75th st
*City: Gainesville
State: Florida
Zip: 32608
International Postal Code:
*Country: United States
*Email: npatel216@gmail.com
*Phone Number: 2166476910 (no dashes or spaces)
*Organization: NSF
*Major Discipline: Mathematics / Computer Science
Secondary Discipline: Mathematics / Computer Science
*Year of Birth (YYYY): 1986
*Place of Birth: INDIA
*Select One: U. S. Citizen / Permanent Resident

Save and Continue

Figure 7 Nomination Information section of the Nomination Form screen. The Save and Continue button is circled.

8. In the **Nomination Information** section (Figure 7), enter requested information about the nominee in the appropriate boxes.
9. Click the **Save and Continue** button (Figure 7). (You can also click the **Save** button to save the form to complete later.) The **Nomination Form** screen displays (Figure 8) with the **Education, Positions Held, Honors and Awards** section open.

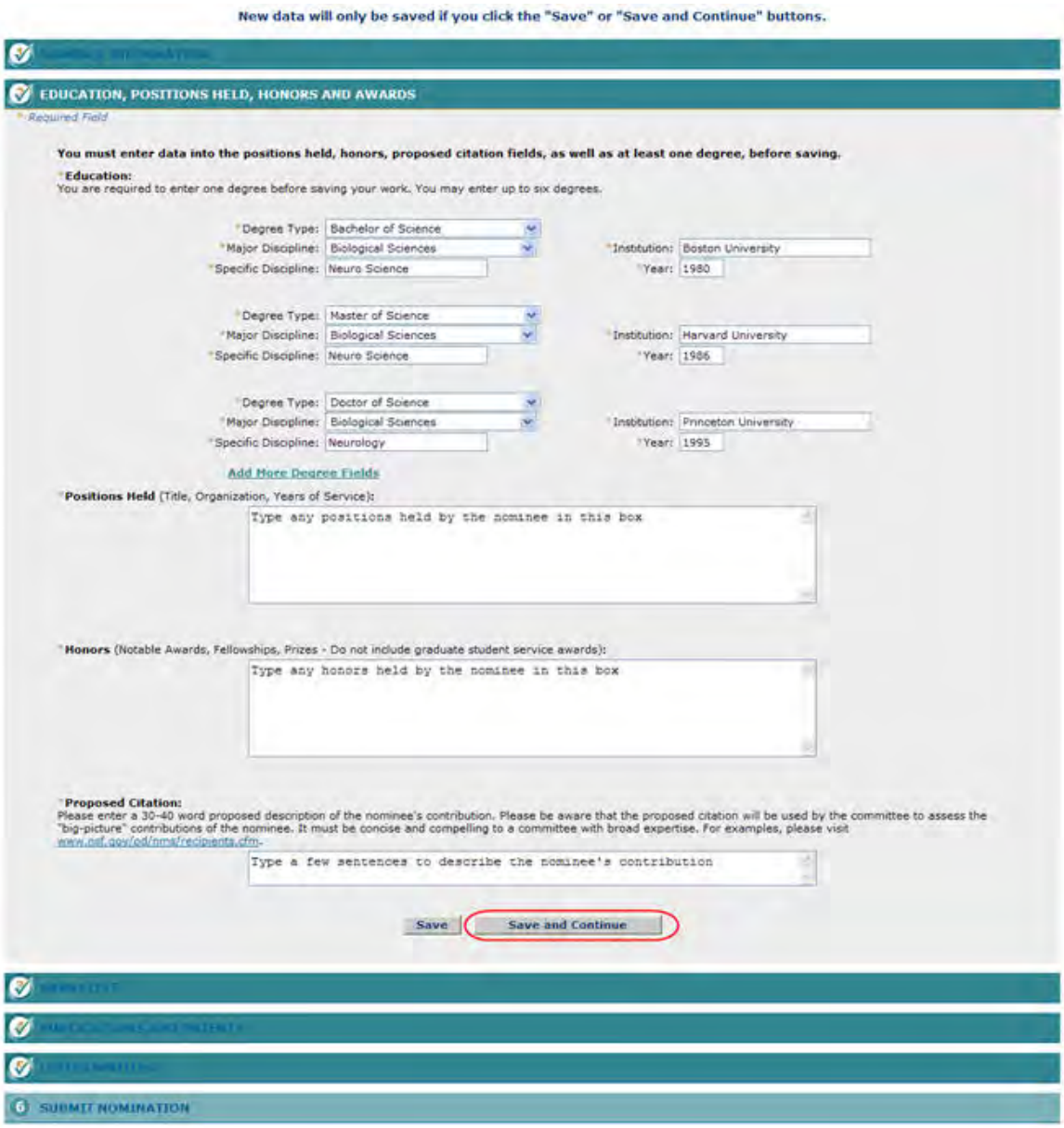


Figure 8 Education, Positions Held, Honors and Awards section of the Nomination Form screen. The Save and Continue button are circled.

10. In the **Education** section (Figure 8), enter the degrees that the nominee has. For each degree, enter the following:
    - Degree type

- Major Discipline
- Specific Discipline
- Institution
- Year

11. If you need to type more than three degrees, click **Add More Degree Fields**. More fields display.
12. In the **Positions Held** box (Figure 8), type each professional position that the nominee has held. For each position, type the following:
    - Position title
    - Organization
    - Years of service
13. In the **Honors** box (Figure 8), type any honors the nominee has received.
14. In the **Proposed Citation** box (Figure 8), describe in one or two sentences the research the nominee is engaged in.
15. Click the **Save and Continue** button (Figure 8). (You can also click the **Save** button to save the form to complete it later). The **Nomination Form** screen displays (Figure 9) with the **Narrative** section open.

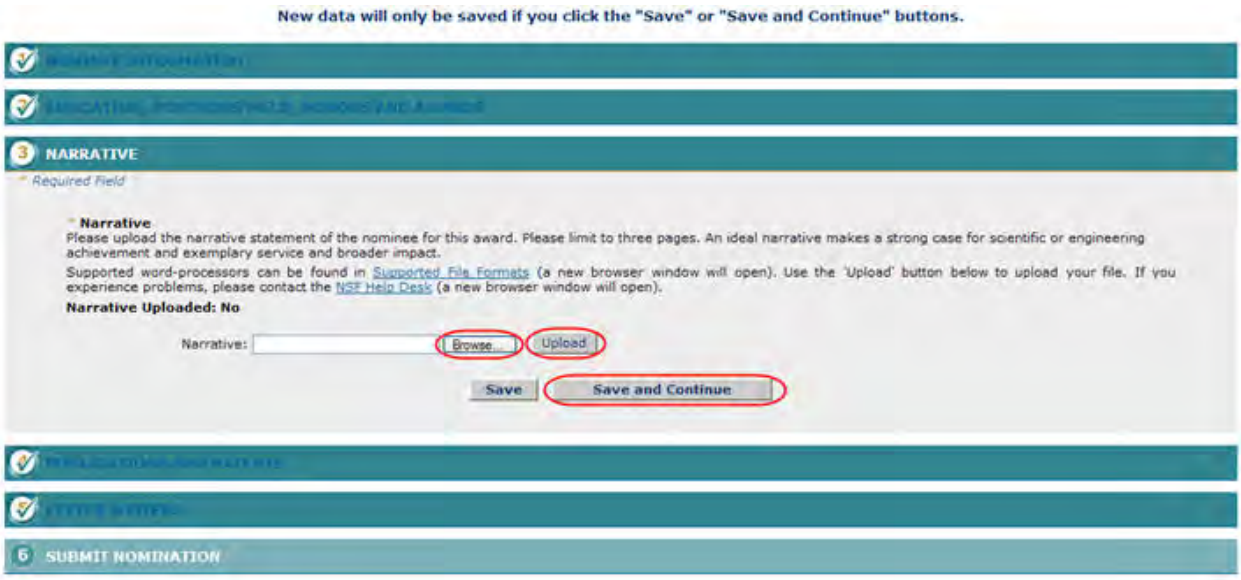


Figure 9 Narrative section of the Nomination Form screen. The Save and Continue button is circled.

16. In the **Narrative** section (Figure 9), browse to and upload the nominee's qualifications for the award.
17. Click the **Save and Continue** button (Figure 9). (You can also click the **Save** button to save the form to complete later.) The **Nomination Form** screen displays (Figure 10) with the **Publications and Patents** section open.

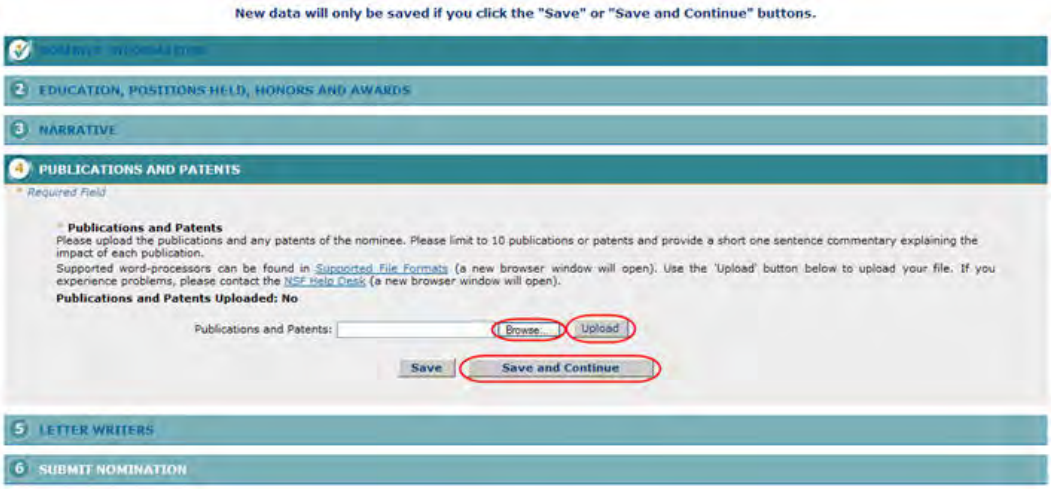
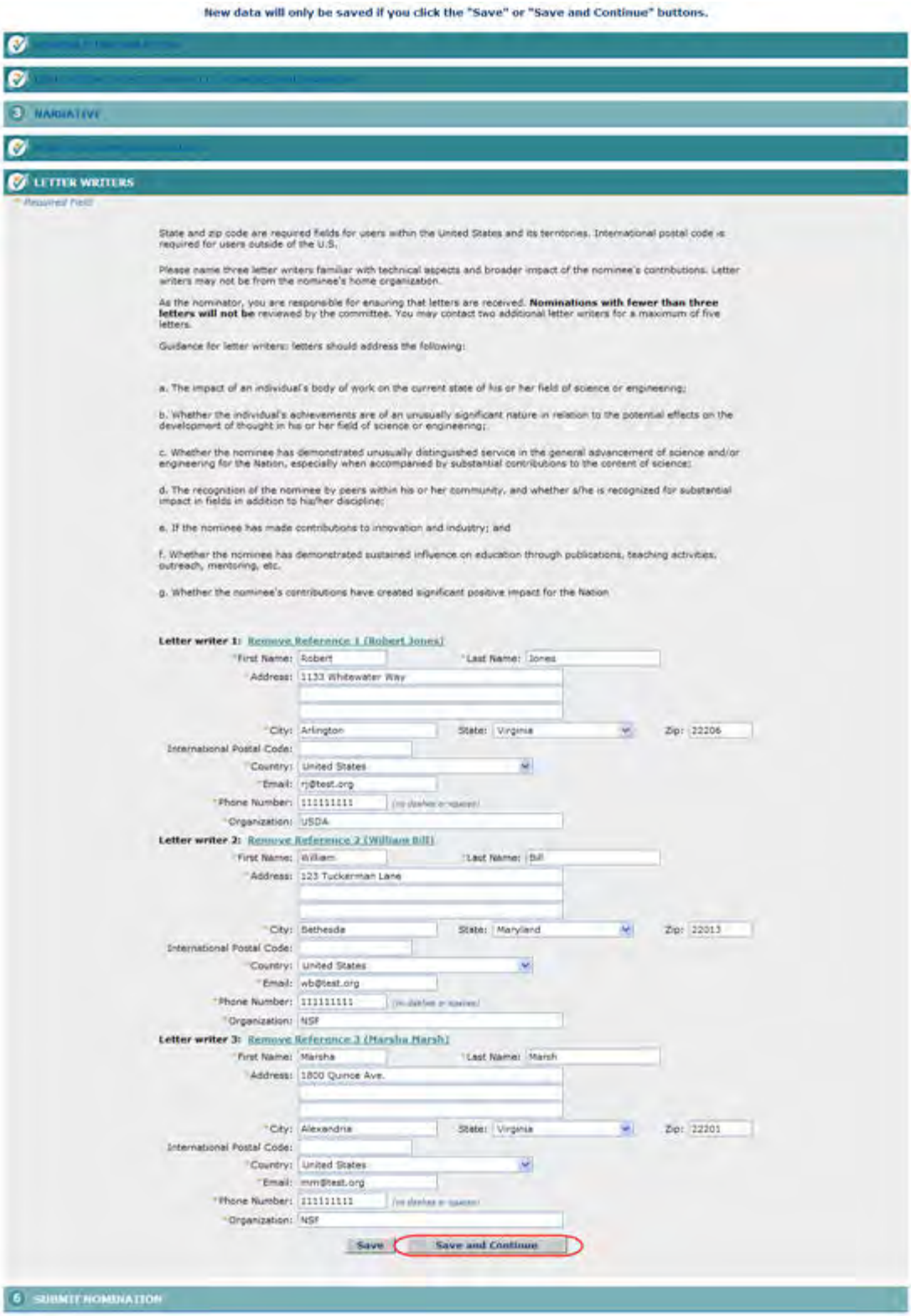


Figure 10 Publications and Patents section of the of the Nomination Form screen. The Save and Continue button is circled.

18. In the **Publications and Patents** section (Figure 10), browse to and upload the publication citations.
19. Click the **Save and Continue** button (Figure 10). (You can also click the **Save** button to save the form to complete it later). The **Nomination Form** screen displays (Figure 11) with the **Letter Writers** section open.



New data will only be saved if you click the "Save" or "Save and Continue" buttons.

3 NARRATIVE

LETTER WRITERS

* Required Field

State and zip code are required fields for users within the United States and its territories. International postal code is required for users outside of the U.S.

Please name three letter writers familiar with technical aspects and broader impact of the nominee's contributions. Letter writers may not be from the nominee's home organization.

As the nominator, you are responsible for ensuring that letters are received. **Nominations with fewer than three letters will not be** reviewed by the committee. You may contact two additional letter writers for a maximum of five letters.

Guidance for letter writers: letters should address the following:

a. The impact of an individual's body of work on the current state of his or her field of science or engineering;

b. Whether the individual's achievements are of an unusually significant nature in relation to the potential effects on the development of thought in his or her field of science or engineering;

c. Whether the nominee has demonstrated unusually distinguished service in the general advancement of science and/or engineering for the Nation, especially when accompanied by substantial contributions to the content of science;

d. The recognition of the nominee by peers within his or her community, and whether s/he is recognized for substantial impact in fields in addition to his/her discipline;

e. If the nominee has made contributions to innovation and industry; and

f. Whether the nominee has demonstrated sustained influence on education through publications, teaching activities, outreach, mentoring, etc.

g. Whether the nominee's contributions have created significant positive impact for the Nation

Letter writer 1: Remove Reference 1 (Robert Jones)

*First Name: Robert *Last Name: Jones

*Address: 1133 Whitewater Way

*City: Arlington State: Virginia Zip: 22206

International Postal Code:

*Country: United States

*Email: rj@test.org

*Phone Number: 111111111 (no dashes or spaces)

*Organization: USDA

Letter writer 2: Remove Reference 2 (William Bill)

*First Name: William *Last Name: Bill

*Address: 123 Tuckerman Lane

*City: Bethesda State: Maryland Zip: 22013

International Postal Code:

*Country: United States

*Email: wb@test.org

*Phone Number: 111111111 (no dashes or spaces)

*Organization: NSF

Letter writer 3: Remove Reference 3 (Marsha Marsh)

*First Name: Marsha *Last Name: Marsh

*Address: 1800 Quince Ave.

*City: Alexandria State: Virginia Zip: 22201

International Postal Code:

*Country: United States

*Email: mm@test.org

*Phone Number: 111111111 (no dashes or spaces)

*Organization: NSF

Save Save and Continue

6 SUBMIT NOMINATION

Figure 11 Letter Writers section of the Nomination Form screen. The Save and Continue button are circled.

20. In the **Letter Writers** section (Figure 11), list at least three letter writers who are not from the nominee's organization and who are familiar with the technical aspects and broader impact of the nominee's contributions. For each letter writer, enter the requested information in the appropriate boxes.

You have now completed the Nomination Form. You have these options:

- Save the nomination to edit it or submit it later
- Submit the nomination

Submit a Nomination for the National Medal of Science

1. Access the **Nomination Form** screen (Figure 1) with the **Submit Nomination** section open (see Complete the Nomination Form).

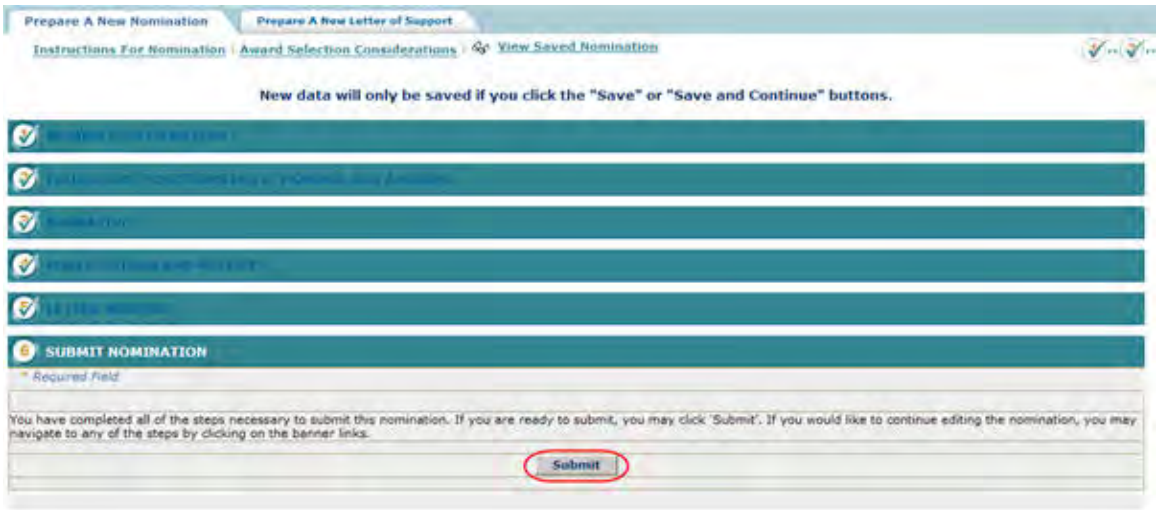


Figure 1 Nomination Form screen. The Submit button is circled.

2. Click the **Submit** button (Figure 1). The **Confirm Award Nomination Submission** screen displays (Figure 2).

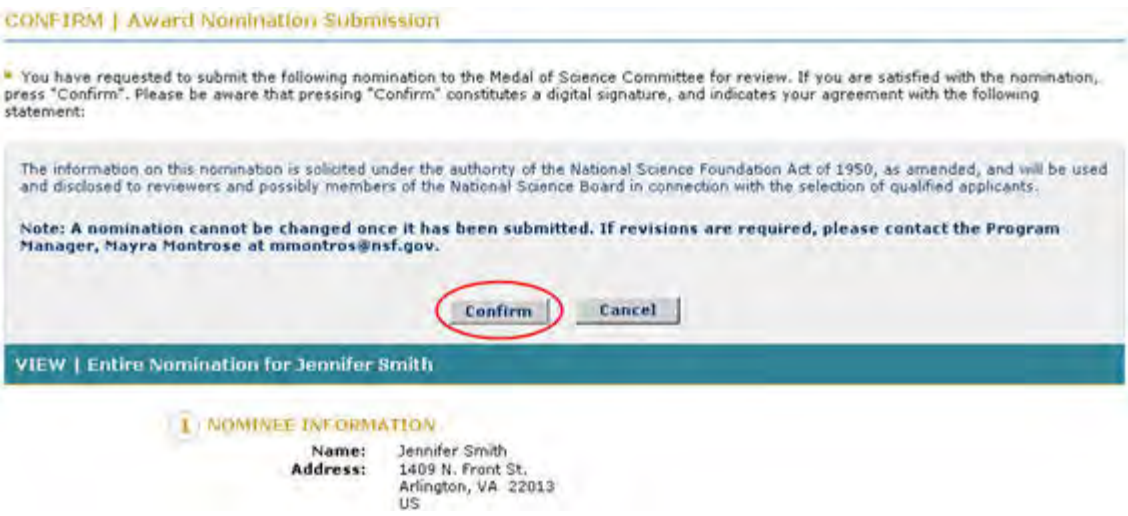


Figure 2 Confirm Award Nomination Submission screen. The Confirm button is circled.

3. Click the **Confirm** button (Figure 2). The **Confirmation** screen displays (Figure 3) with the message that the nomination has been submitted.

Figure 3 Confirmation screen.

4. Click **Back to Award Homepage** (Figure 3). The **National Medal of Science** screen displays (Figure 4) with the nomination listed with the status of Submitted.

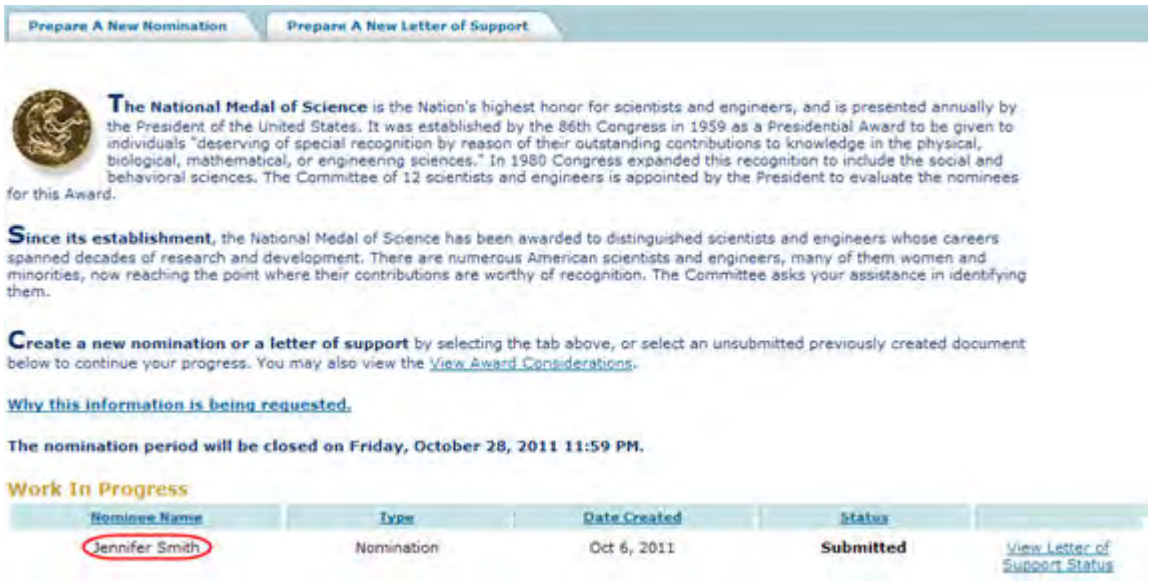


Figure 4 National Medal of Science screen with the nomination listed with the status of Submitted.

Edit a Saved Nomination for the National Medal of Science

1. Access the **Honorary Awards** screen (Figure 1) (see Log In to Honorary Awards).

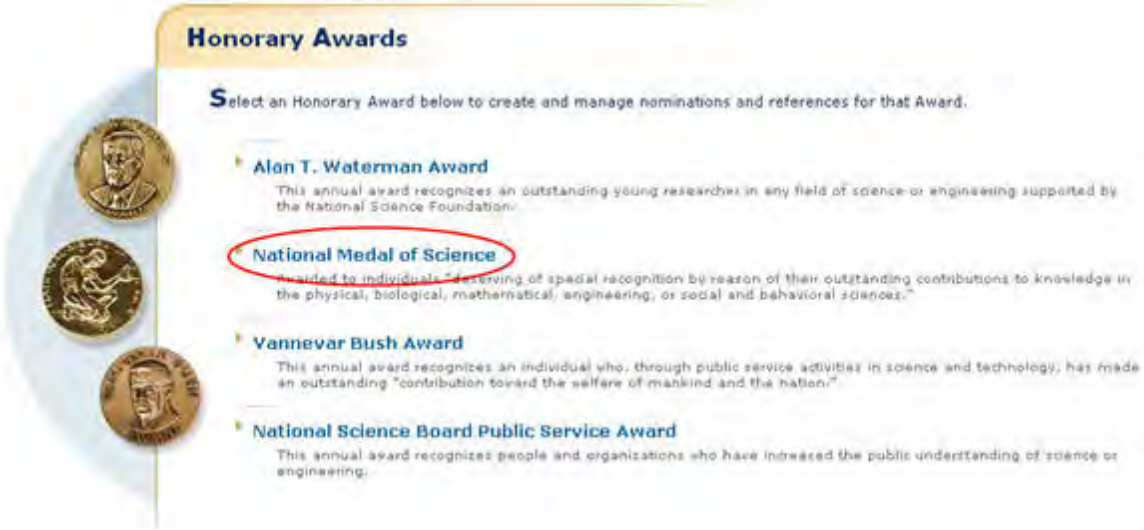


Figure 1 Honorary Awards screen. The National Medal of Science link is circled.

2. On the **Honorary Awards** screen (Figure 1), click **National Medal of Science**. The **National Medal of Science** screen displays (Figure 2) with the saved nomination in the **Work in Progress** section.

Figure 2 National Medal of Science screen. The link to the saved nomination is circled.

3. Click the nomination title (Figure 2). The **Nomination Form** screen displays (Figure 3) with the **Nomination Information** section open. On this screen, you can edit any section by clicking on the section title and then clicking the **Save and Continue** button or the **Save** button (see Complete the Nomination Form, Step 8 through Step 22, for detailed instructions for each section).

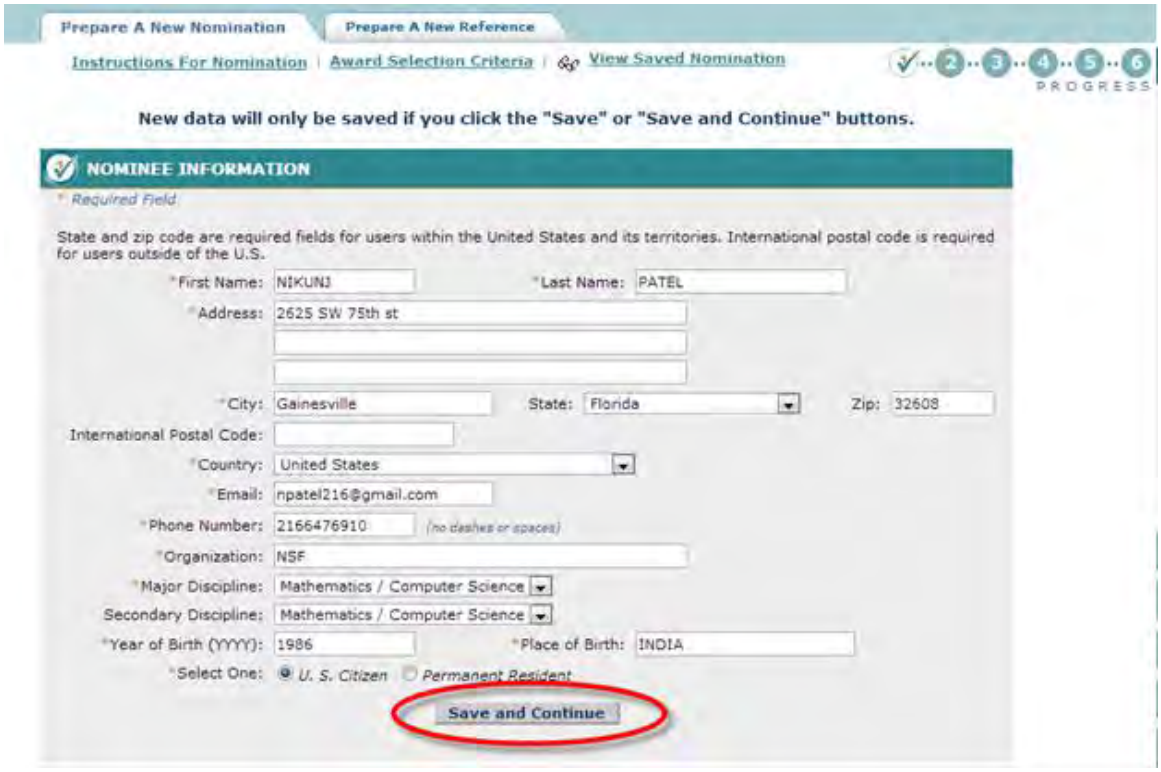


Figure 3 Nomination Form screen with the Nominee Information section open.

Save a Nomination for the National Medal of Science

After you have completed at least the first section of a nomination, you can save it for future work.

1. Access the **Nomination Form** screen (Figure 1) and complete at least the first section of the nomination (see Complete the Nomination Form).

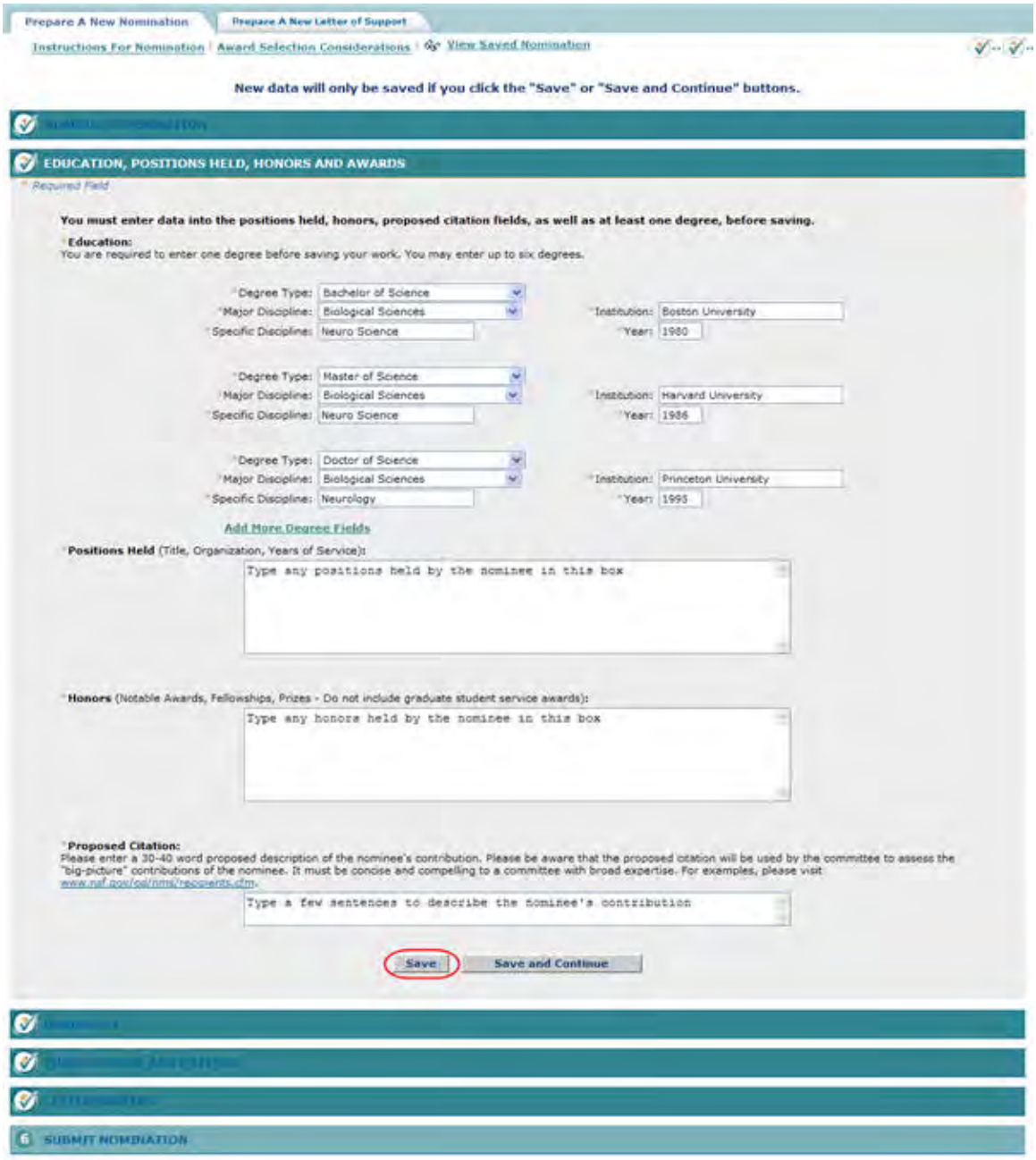


Figure 1 Nomination Form screen open to the Education, Positions Held, Honors and Awards section. The Save button is circled.

2. On the **Nomination Form** screen (Figure 1), click the **Save** button. The Nomination is saved, and the **Nomination Form** screen displays with the section open on which you clicked the **Save** button (Figure 2). The Nomination is now listed on the **National Medal of Science** screen (Figure 3) with the status of In Progress.

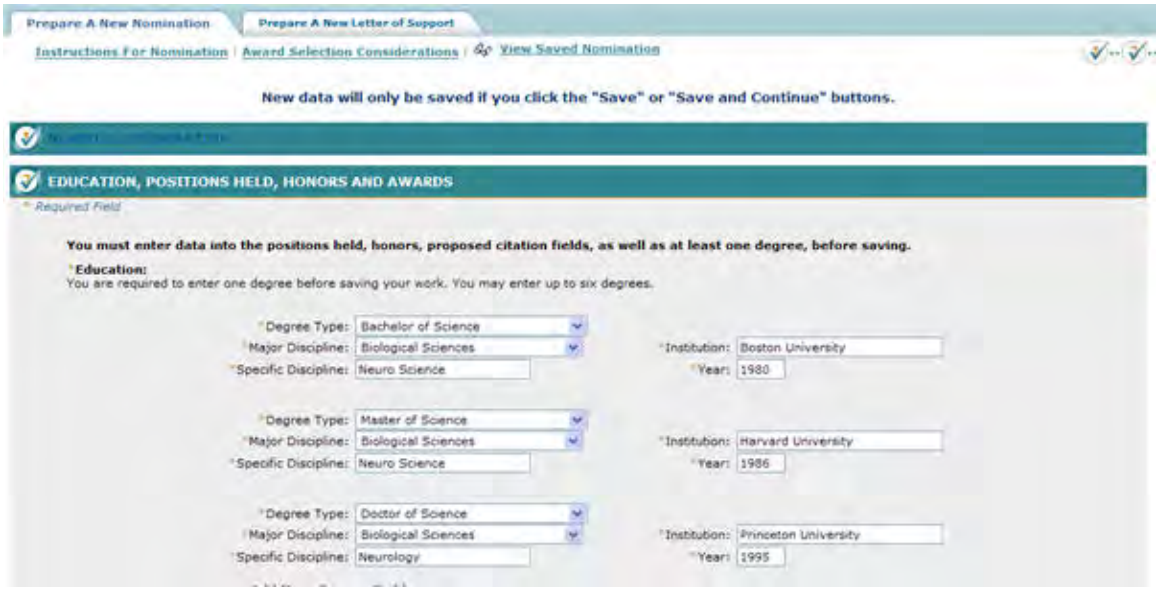


Figure 2 Nomination Form screen after the Nomination has been saved.

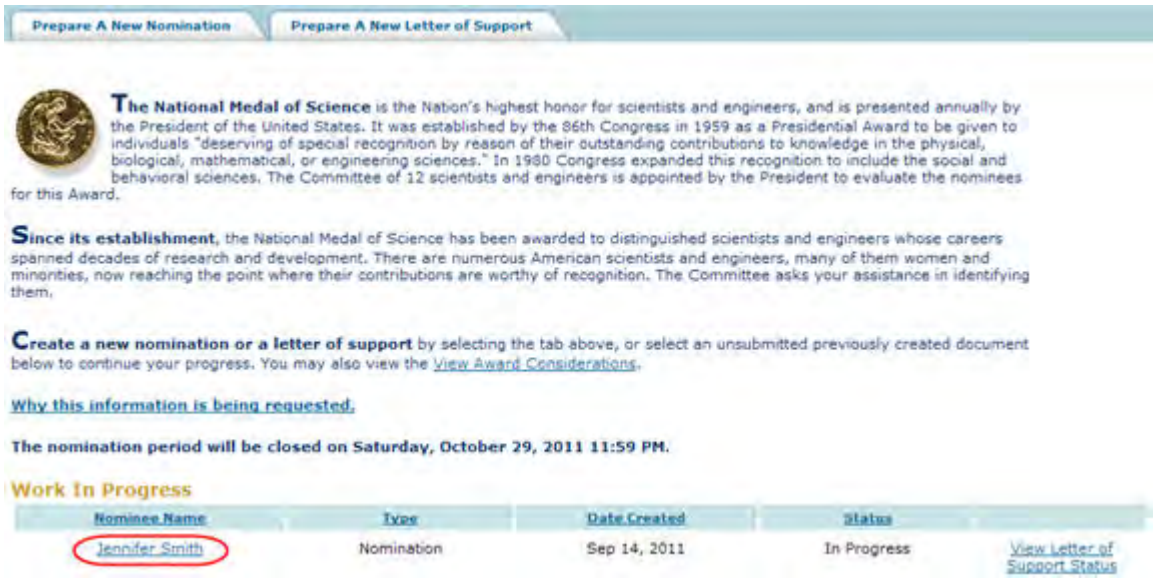


Figure 3 National Medal of Science screen with the saved Nomination (circled) listed with the status of In Progress

Submit a Saved Nomination for the National Medal of Science

1. Access the **Honorary Awards** screen (Figure 1) (see Log In to Honorary Awards).

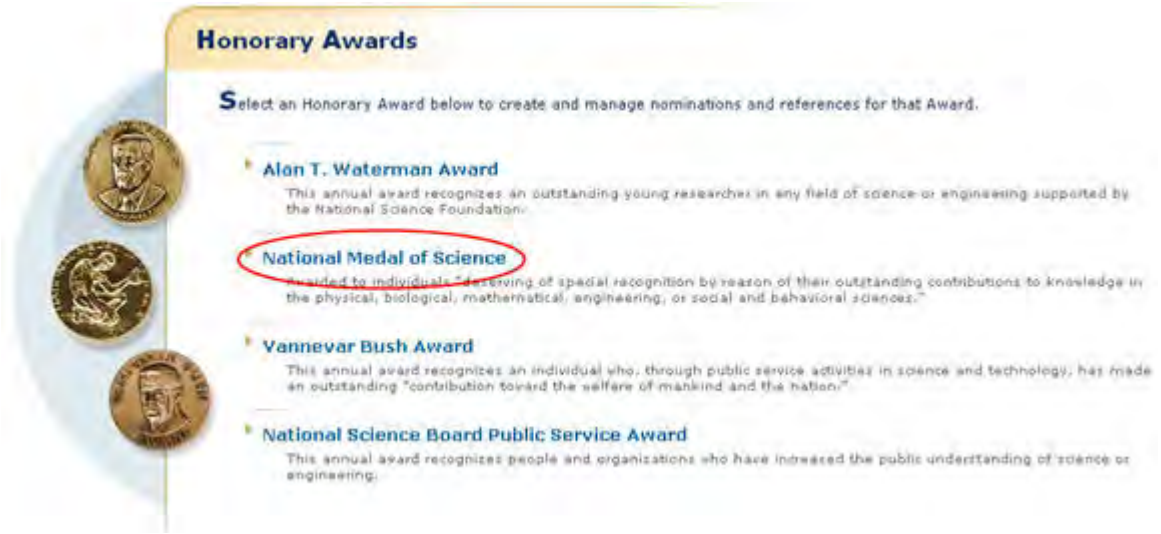


Figure 1 Honorary Awards screen. The National Medal of Science link is circled.

2. On the **Honorary Awards** screen (Figure 1), click **National Medal of Science**. The **National Medal of Science** screen displays (Figure 2) with the saved nomination in the **Work in Progress** section.

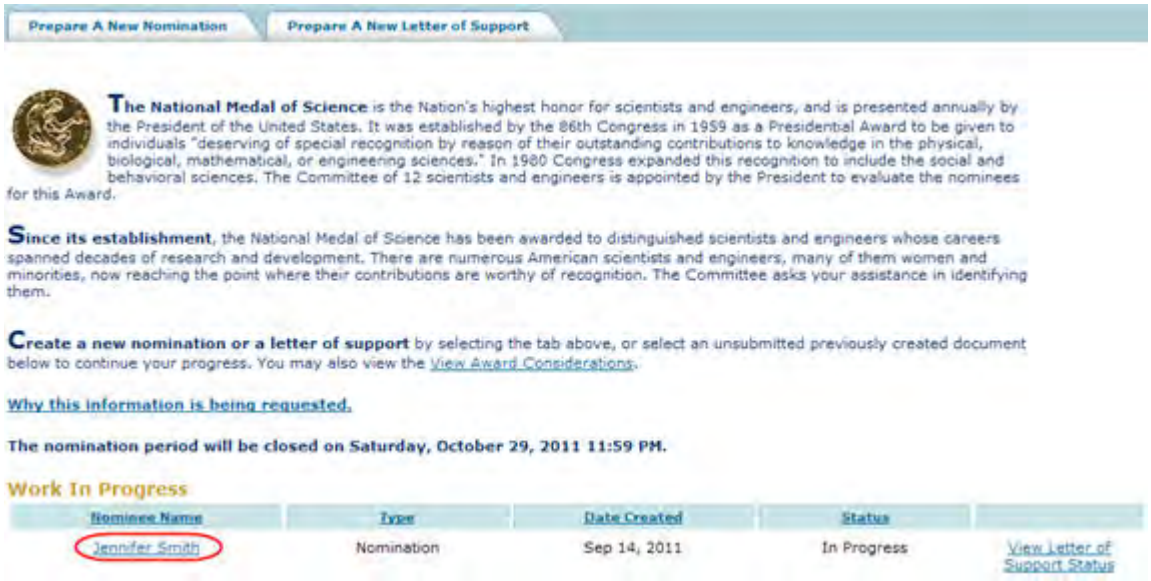


Figure 2 National Medal of Science screen. The link to the saved nomination is circled.

3. Click the nomination title (Figure 3). The **Nomination Form** screen displays (Figure 3).

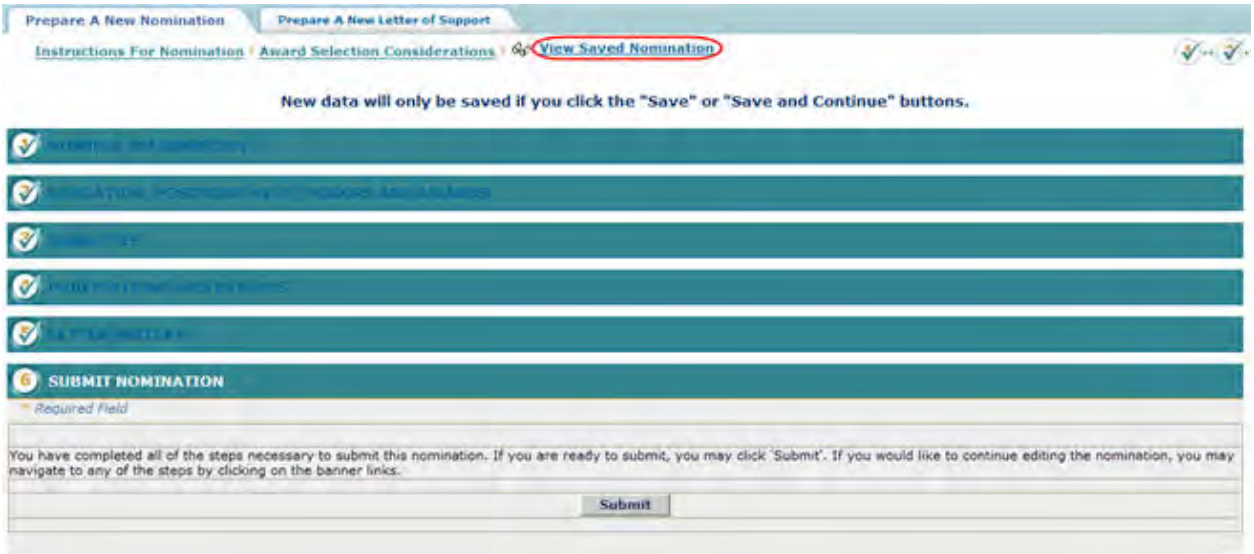


Figure 3 Nomination Form screen. The View Saved Nomination link is circled.

4. Click **View Saved Nomination** (Figure 3). The **View Entire Nomination** screen displays (Figure 4).

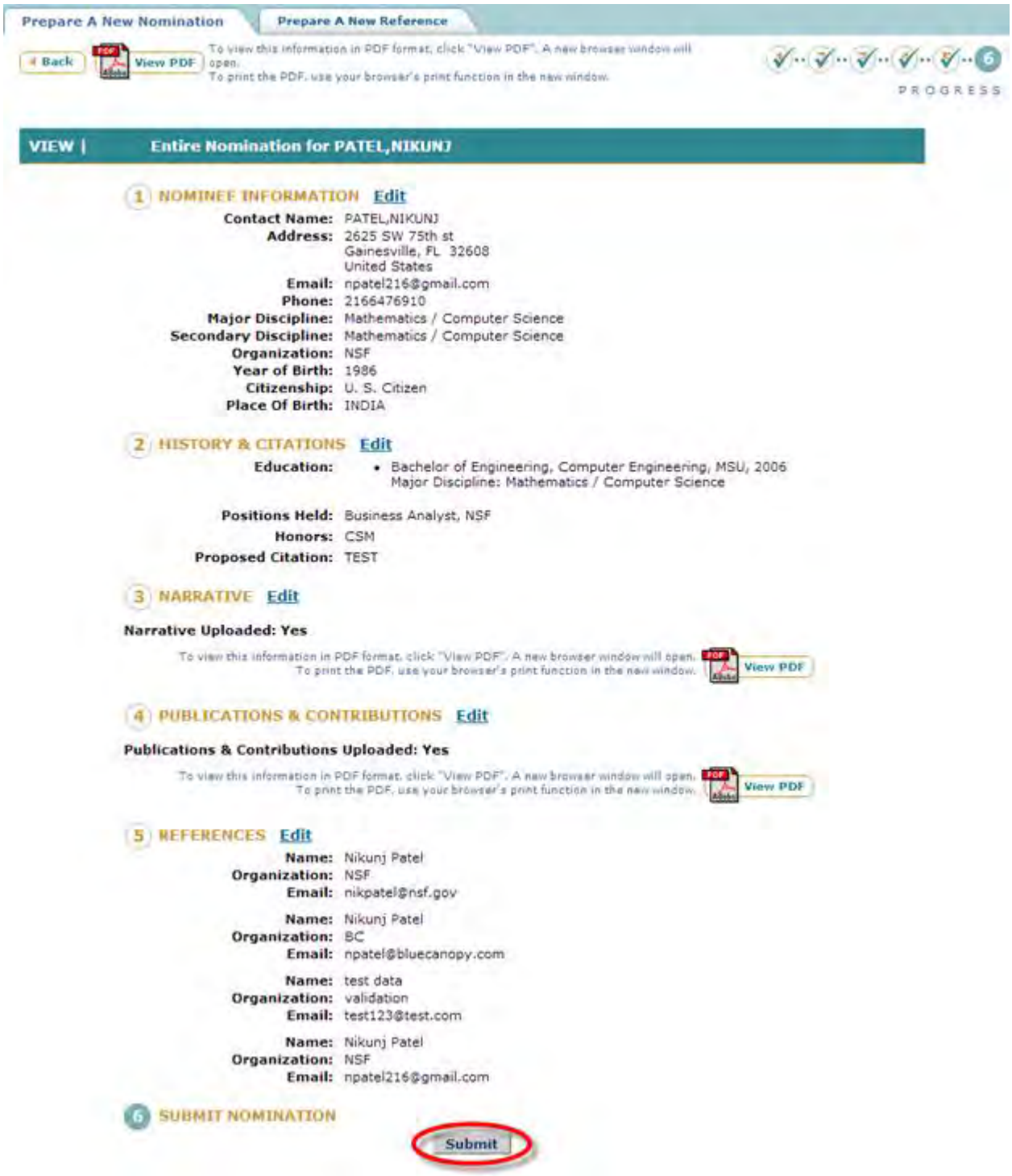


Figure 4 View Entire Nomination screen. The Submit button is circled.

5. Click the **Submit** button (Figure 4). The **Confirm Award Nomination Submission** screen displays (Figure 5).

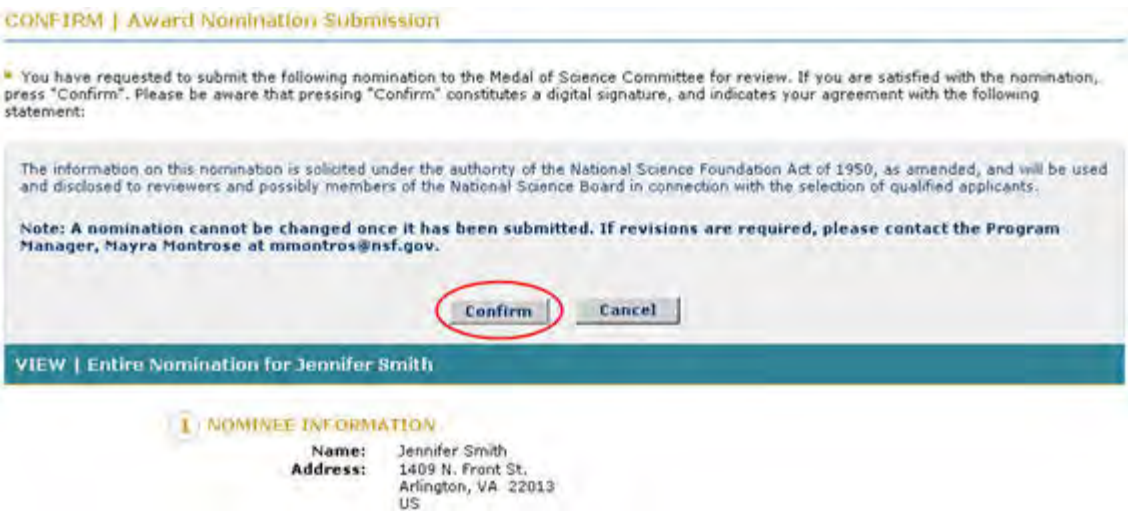


Figure 5 Confirm Award Nomination Submission screen. The Confirm button is circled.

6. Click the **Confirm** button (Figure 5). The **Confirmation** screen displays (Figure 6) with the message that the nomination has been submitted.

Figure 6 Confirmation screen.

7. Click **Back to Award Homepage** (Figure 6). The **National Medal of Science** screen displays (Figure 7) with the nomination listed with the status of Submitted.

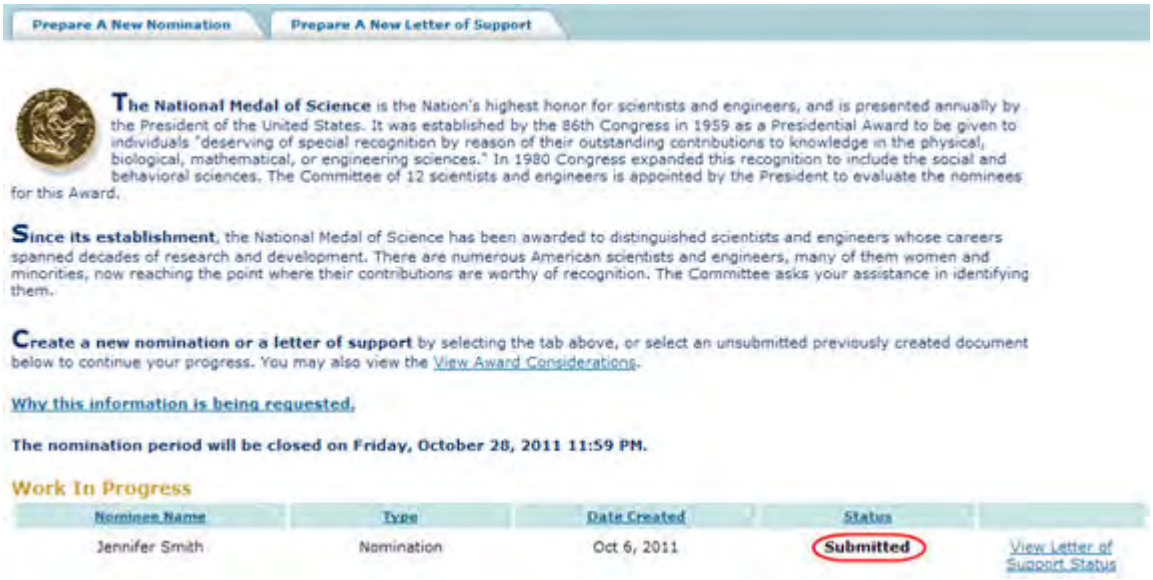


Figure 7 National Medal of Science screen with the nomination now listed with the status of Submitted.

View an Entire Nomination for the National Medal of Science

1. Access the **Honorary Awards** screen (Figure 1) (see Log In to Honorary Awards).

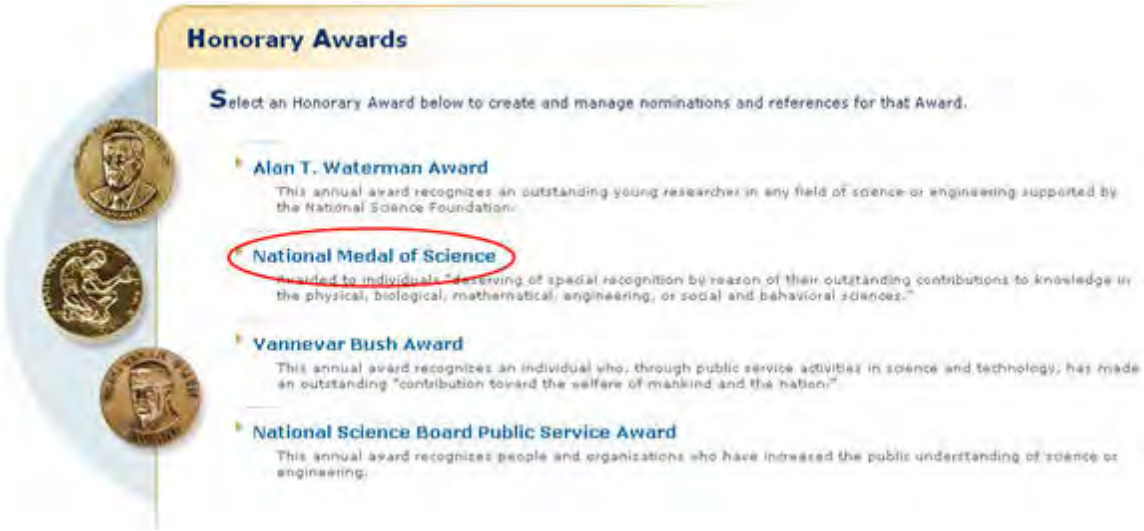


Figure 1 Honorary Awards screen. The National Medal of Science link is circled.

2. On the **Honorary Awards** screen (Figure 1), click **National Medal of Science**. The **National Medal of Science** screen displays (Figure 2).

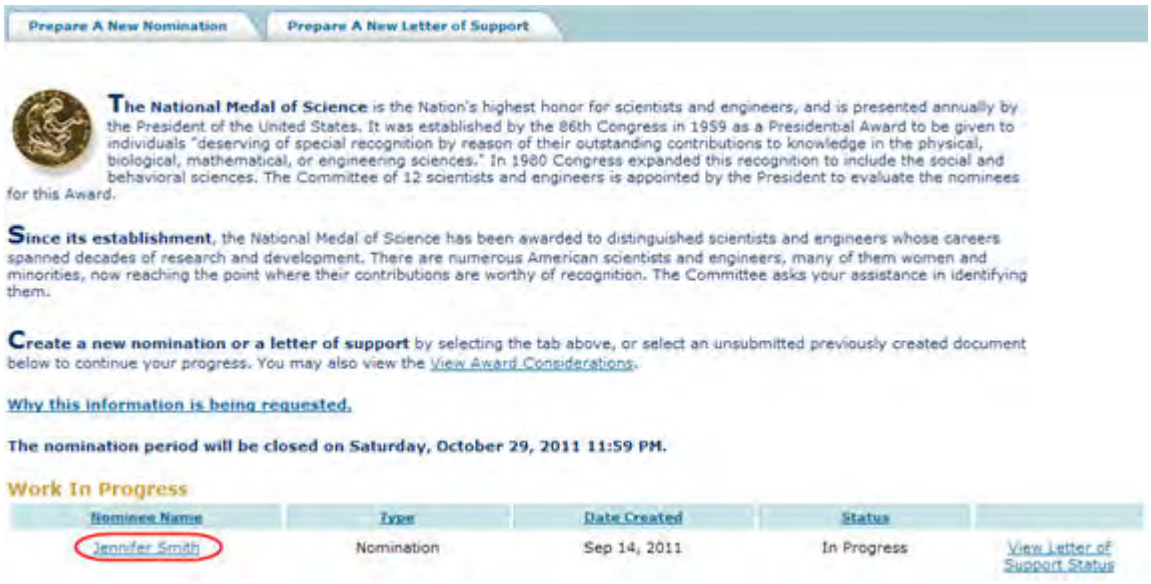


Figure 2 National Medal of Science screen. The link to the saved Nomination is circled.

3. Click the nomination title (Figure 2). The **Nomination Form** screen displays (Figure 3).

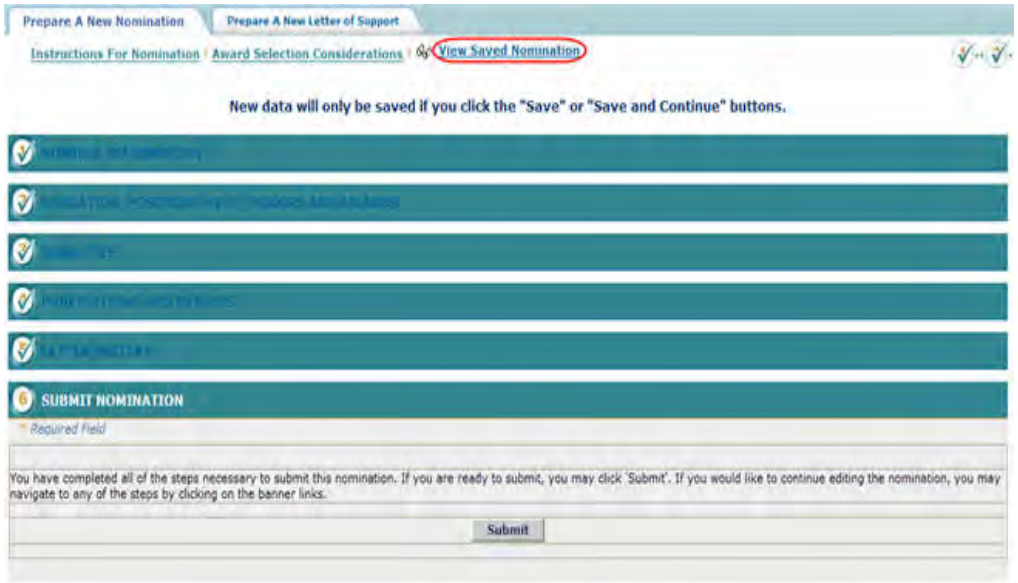


Figure 3 Nomination Form screen. The View Saved Nomination link is circled.

4. Click **View Saved Nomination** (Figure 3). The **View Entire Nomination** screen displays (Figure 4). You can edit from this screen also by clicking the **Edit** button for any section.

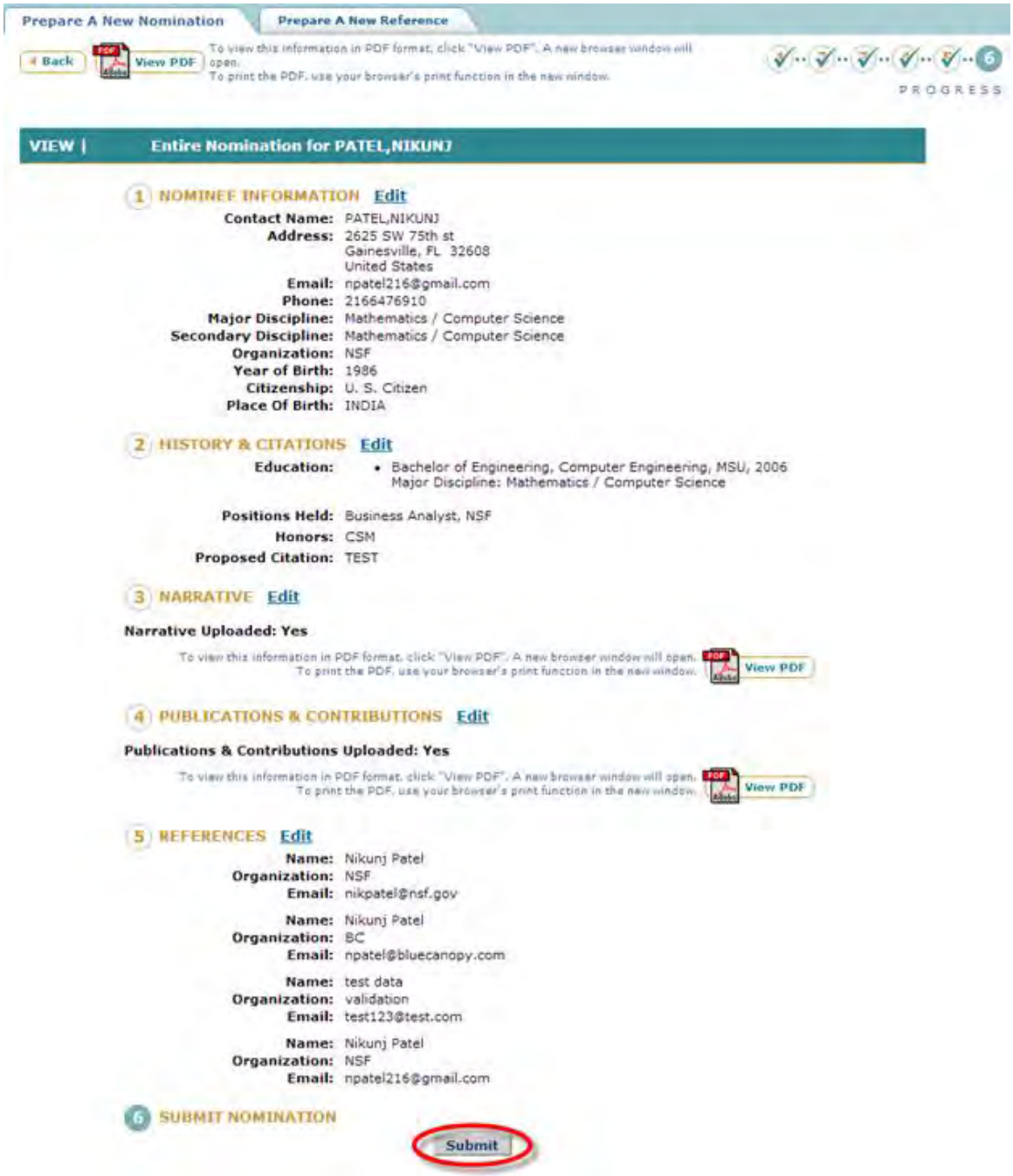


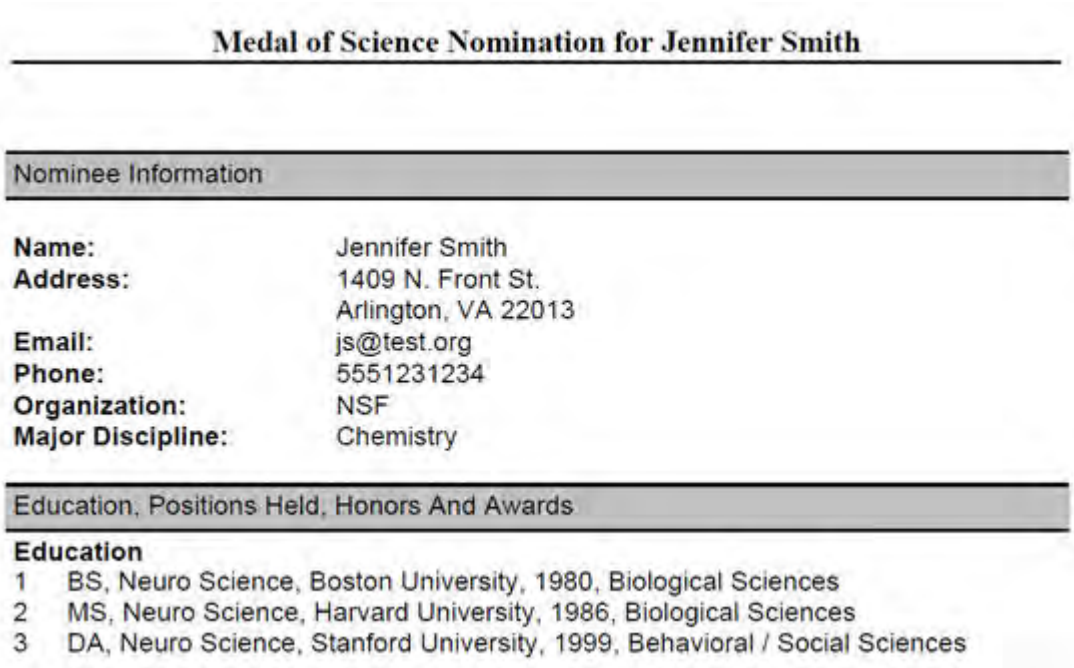
Figure 4 View Entire Nomination screen.

View a Nomination in PDF for the National Medal of Science

1. Access the **View Entire Nomination** screen (Figure 1) (see View Entire Nomination).

Figure 1 View Entire Nomination screen. The View PDF link is circled.

2. On the **View Entire Nomination** screen (Figure 1), click **View PDF**. The Nomination displays in PDF format in a new window (Figure 2).



Medal of Science Nomination for Jennifer Smith

Nominee Information

Name:	Jennifer Smith
Address:	1409 N. Front St. Arlington, VA 22013
Email:	js@test.org
Phone:	5551231234
Organization:	NSF
Major Discipline:	Chemistry

Education, Positions Held, Honors And Awards

Education

1 BS, Neuro Science, Boston University, 1980, Biological Sciences
2 MS, Neuro Science, Harvard University, 1986, Biological Sciences
3 DA, Neuro Science, Stanford University, 1999, Behavioral / Social Sciences

Figure 2 Nomination in PDF format in a new window.

3. Click the **Save** icon (Figure 2) to save the nomination to your computer.
4. Click the **Print** icon (Figure 2) to print the nomination.

View the Status of a Letter of Support for the National Medal of Science

1. Access the **Honorary Awards** screen (Figure 1) (see Log In to Honorary Awards).

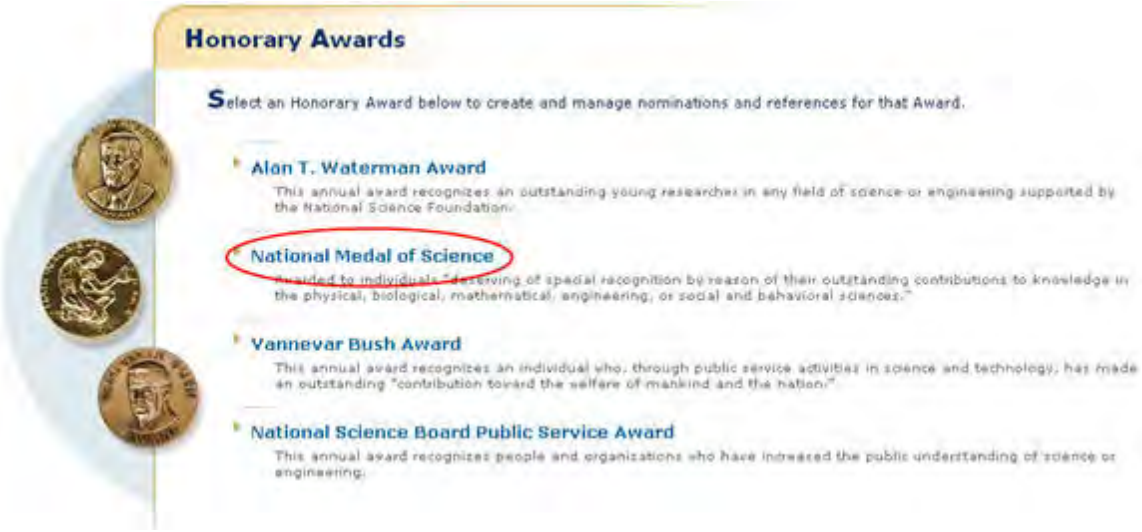


Figure 1 Honorary Awards screen. The National Medal of Science link is circled.

2. On the **Honorary Awards** screen (Figure 1), click **National Medal of Science**. The **National Medal of Science** screen displays (Figure 2).

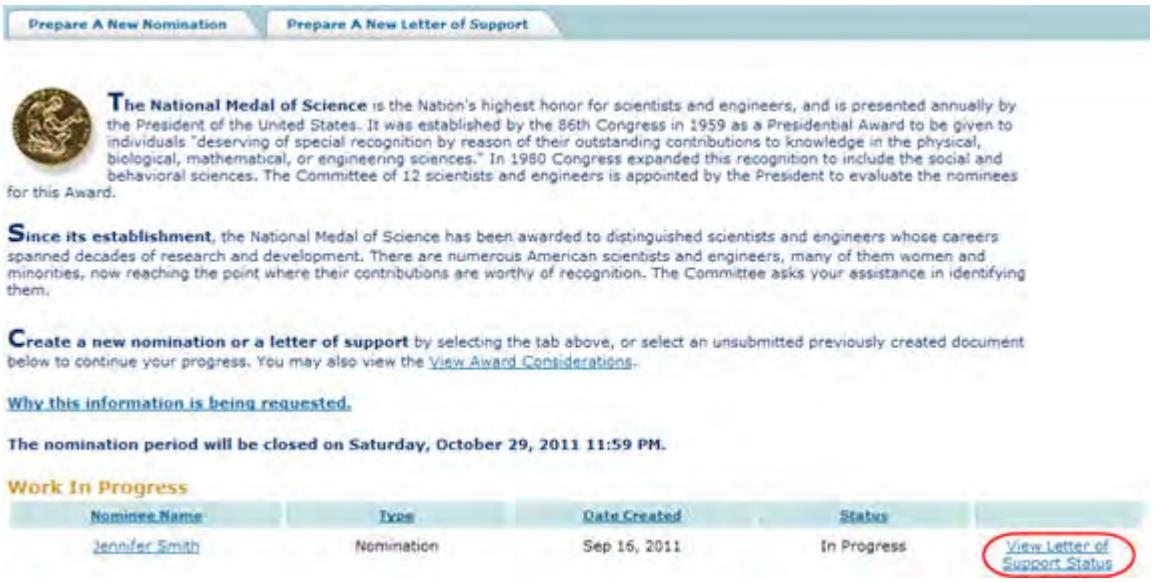


Figure 2 National Medal of Science screen. The View Letter of Support Status link is circled.

3. Click **View Letter of Support Status** (Figure 2). The **View Letter of Support Status List** screen displays (Figure 3) with the letters of support listed with their status as Received or Not yet Received.

Figure 3 View Letter of Support Status List screen.

Letter of Support for National Medal of Science

Prepare a Letter of Support for a Nominee for the National Medal of Science

In preparing and submitting a Letter of Support for a nominee for the National Medal of Science, you can conduct the following activities:

- Complete the Letter of Support Form
- Submit a Letter of Support
- Save a Letter of Support
- Edit a saved Letter of Support
- View the entire Letter of Support
- View the Letter of Support in PDF
- Submit a saved Letter of Support

Prepare a Letter of Support for a Nominee for the National Medal of Science

In preparing and submitting a Letter of Support for a nominee for the National Medal of Science, you can conduct the following activities:

- Complete the Letter of Support Form
- Submit a Letter of Support
- Save a Letter of Support
- Edit a saved Letter of Support
- View the entire Letter of Support
- View the Letter of Support in PDF
- Submit a saved Letter of Support

Complete the Letter of Support for the National Medal of Science

To prepare a Letter of Support for the National Medal of Science, you must first register for Honorary Awards. See Register for Honorary Awards.

1. Access the **Honorary Awards** screen (Figure 1) (see Register for Honorary Awards or Log In to Honorary Awards).

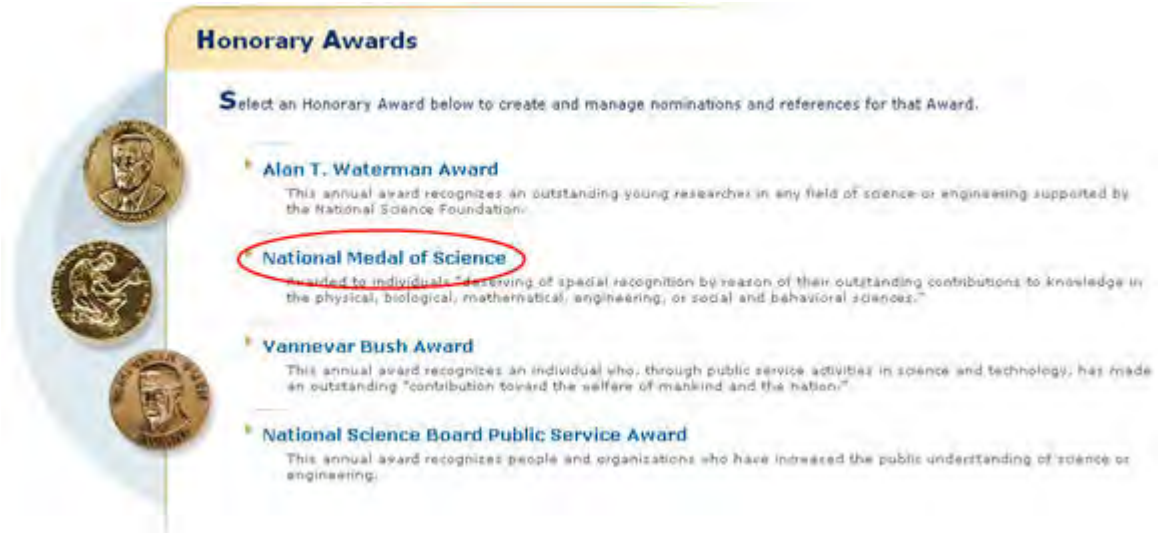


Figure 1 Honorary Awards screen. The National Medal of Science link is circled.

2. On the **Honorary Awards** screen (Figure 1), click **National Medal of Science**. The **National Medal of Science** screen displays.

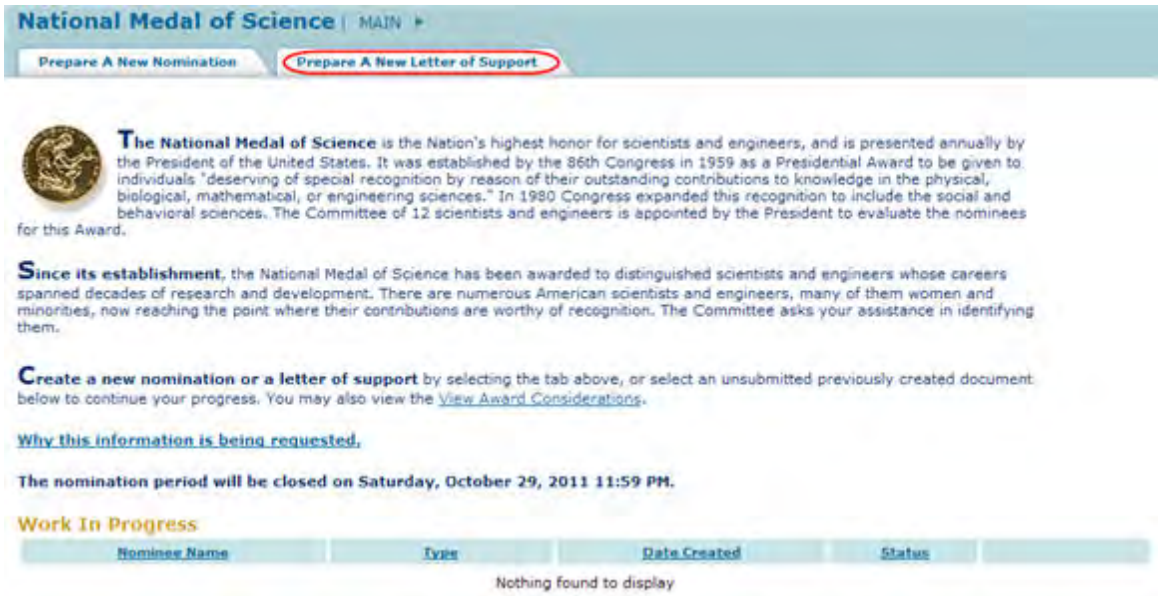


Figure 2 National Medal of Science screen. The Prepare a New Letter of Support tab is circled.

3. Click the **Prepare a New Letter of Support** tab (Figure 2). The **Instructions for Preparing a Letter of Support** screen displays (Figure 3).

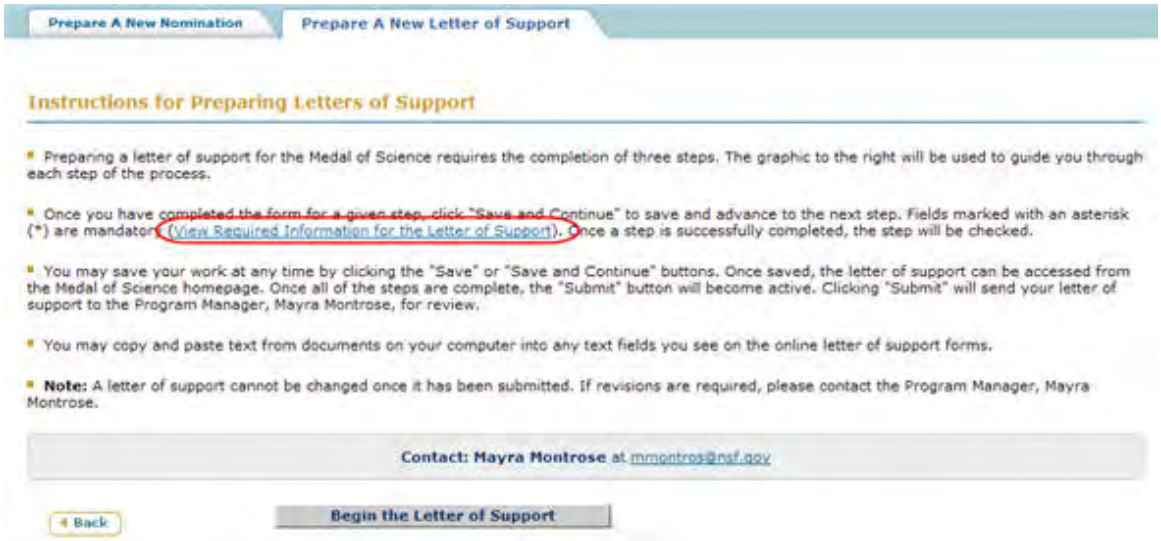


Figure 3 Instructions for Preparing a Letter of Support screen. The View Required Information for the Letter of Support link is circled.

4. To see the form requirements, click **View Required Information for the Letter of Support** (Figure 3). The **Required Information for Letter of Support** screen displays (Figure 4) with a listing of all the components of the Letter of Support.

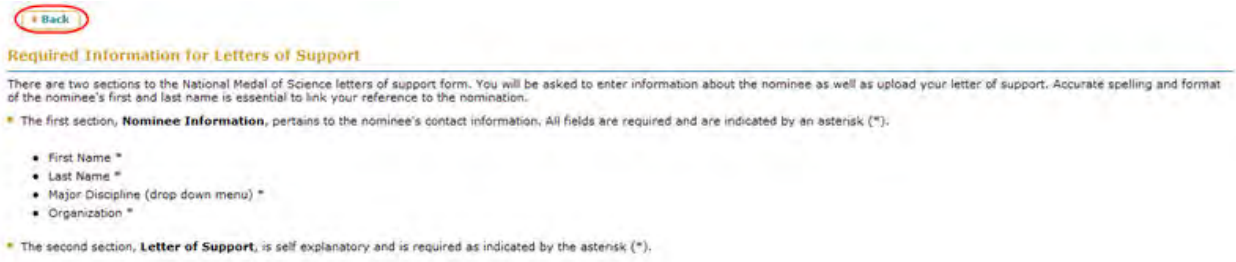


Figure 4 Required Information for Letter of Support screen. The Back button is circled.

5. Click the **Back** button (Figure 4). The **Instructions for Preparing a Letter of Support** screen displays (Figure 5).

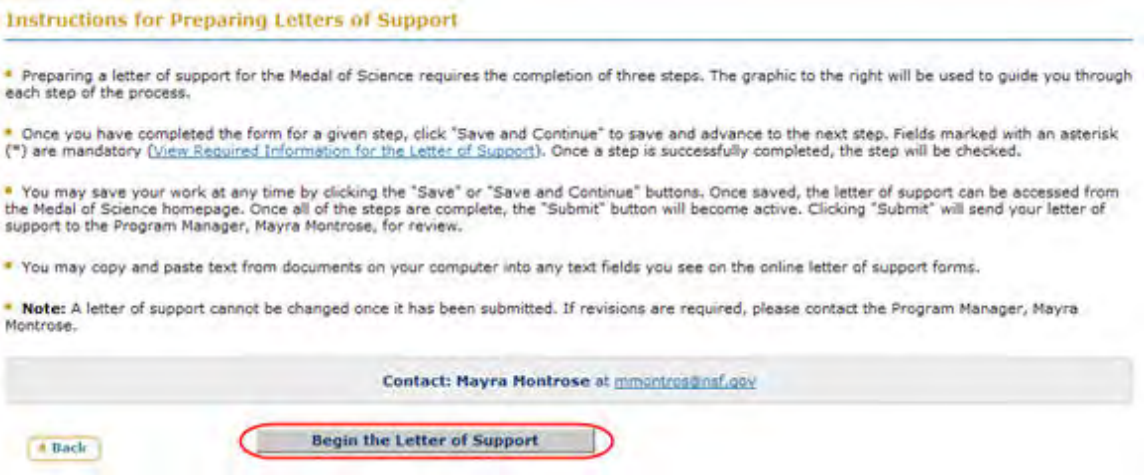


Figure 5 Instructions for Preparing a Letter of Support screen. The Begin the Letter of Support link is circled.

6. Click the **Begin the Letter of Support** button (Figure 5). The **Letter of Support Form** screen displays (Figure 6) with the **Nominee Information** section open.

Figure 6 Letter of Support Form screen with the Nominee Information section open. The Save and Continue button is circled.

7. Enter the required information in the appropriate boxes (Figure 6).
8. Click the **Save and Continue** button (Figure 6). The **Letter of Support Form** screen displays (Figure 7) with the **Letter of Support** section open.

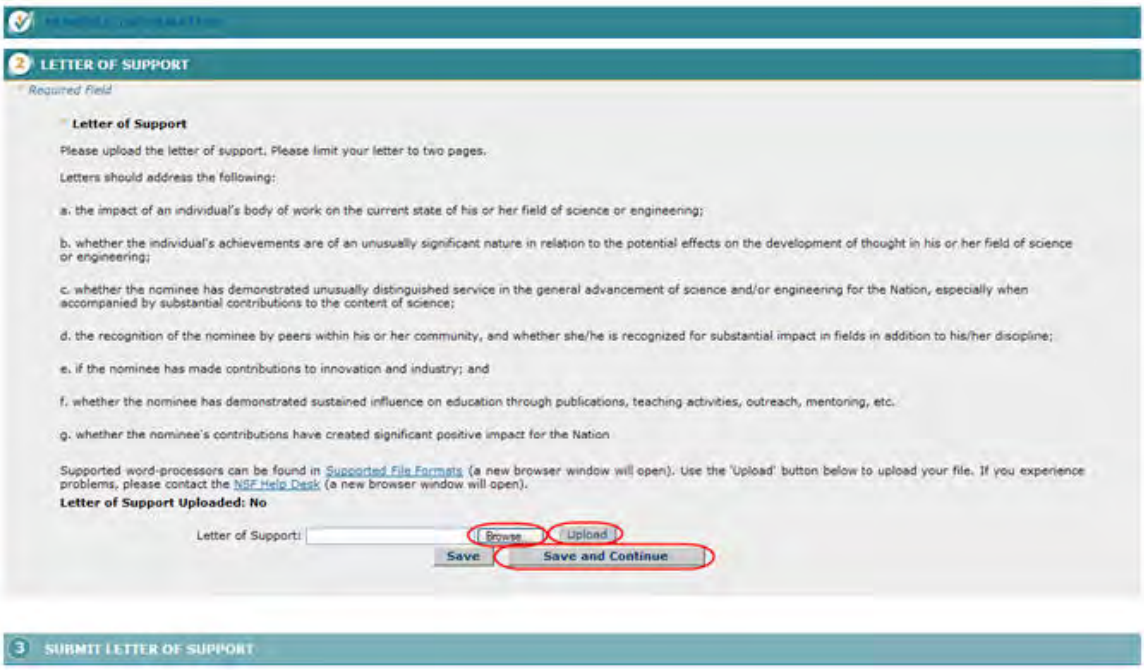


Figure 7 Letter of Support screen with the Letter of Support section open. The Save and Continue button is circled.

9. Browse to and Upload a Letter of Support (Figure 7).

You have now completed the Letter of Support form. You have these options:

- Save the Letter of Support to edit it or submit it later
- Submit the Letter of Support

Submit a Letter of Support for the National Medal of Science

1. **Access the Letter of Support Form** screen (Figure 1) with the **Submit Letter of Support** section open (see Complete the Letter of Support Form).

Figure 1 Letter of Support screen. The Submit button is circled.

2. On the **Letter of Support Form** screen (Figure 1), click the **Submit** button. The **Confirm Award Letter of Support Submission** screen displays (Figure 2).

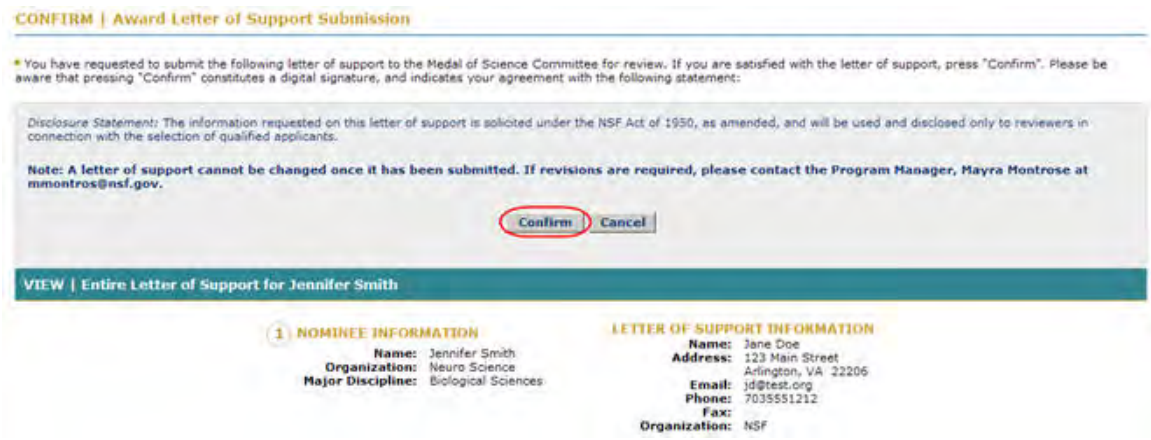


Figure 2 Confirm Award Letter of Support Submission screen. The Confirm button is circled.

3. Click the **Confirm** button (Figure 2). The **Confirmation** screen displays (Figure 3).

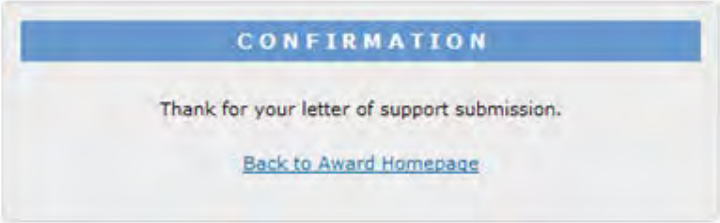


Figure 3 Confirmation screen.

4. Click the **Back to Award Homepage** (Figure 3). The **National Medal of Science** screen displays (Figure 4) with the Letter of Support listed with the status of **Submitted**.

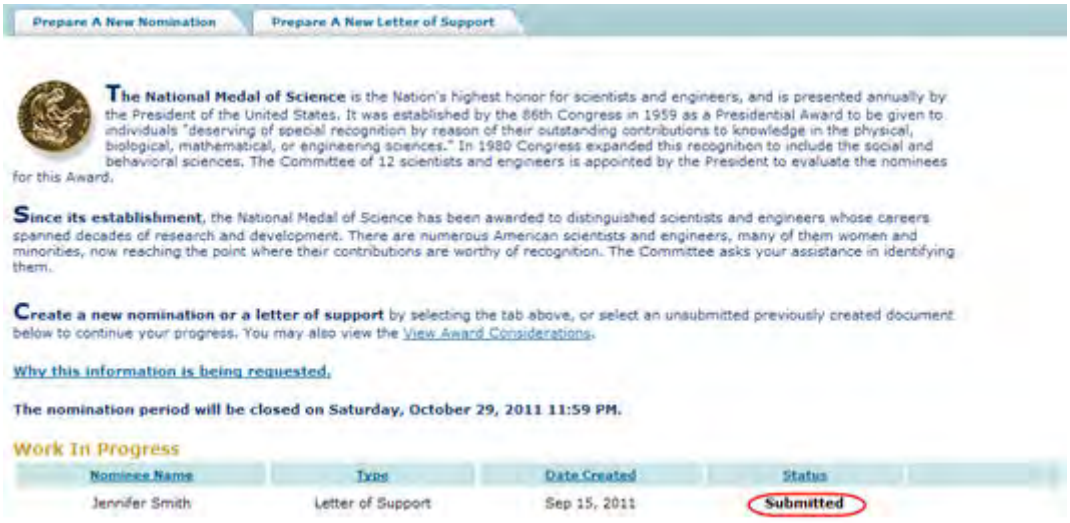


Figure 4 National Medal of Science screen with the Letter of Support listed with the status of Submitted.

Edit a Saved Letter of Support for the National Medal of Science

1. Access the **Honorary Awards** screen (Figure 1) (see Log In to Honorary Awards).

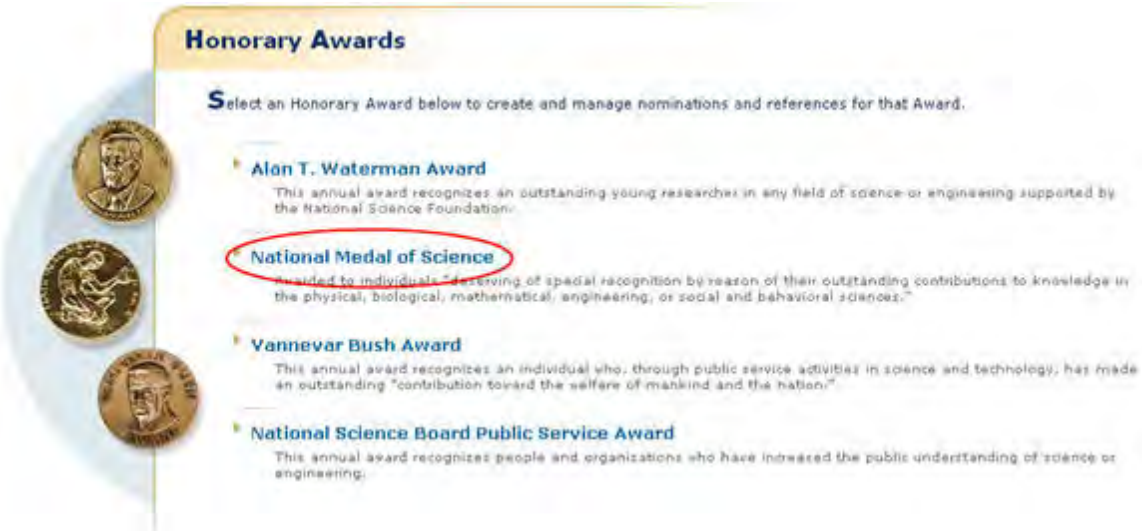


Figure 1 Honorary Awards screen. The National Medal of Science link is circled.

2. On the **Honorary Awards** screen (Figure 1), click **National Medal of Science**. The **National Medal of Science** screen displays (Figure 2) with the letter of support listed in the **Work in Progress** section.

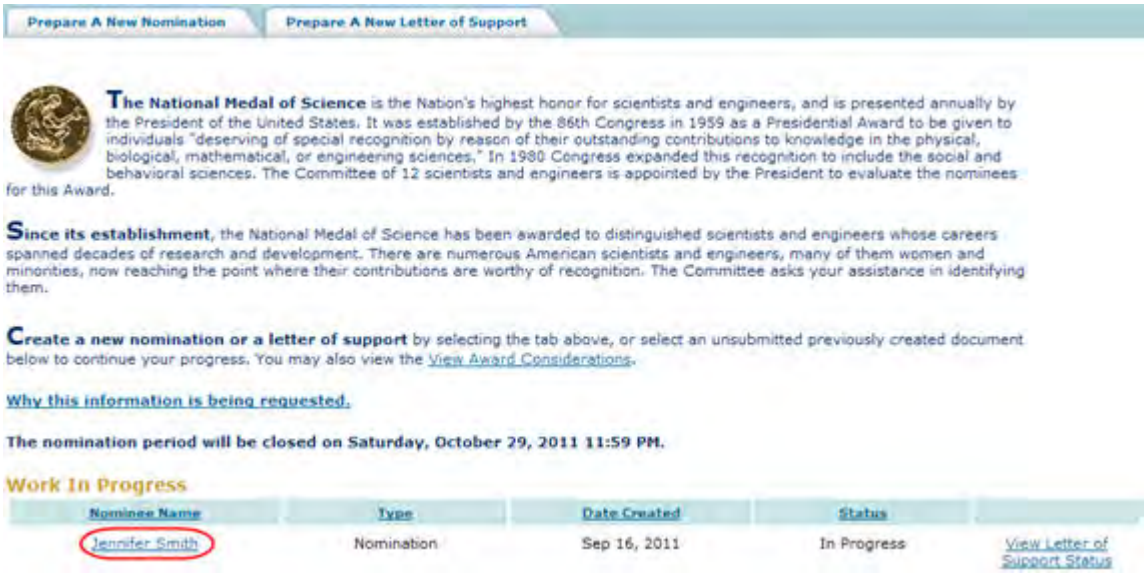


Figure 2 National Medal of Science screen. The Nominee Name for the Letter of Support is circled.

3. Click the name of the Nominee associated with the Letter of Suuport (Figure 2). The **Letter of Support** screen displays (Figure 3). On this screen, you can edit any section by clicking on the section title and then clicking the **Save and Continue** button or **Save** button (see Complete the Letter of Support Form, for instructions on completing the form).

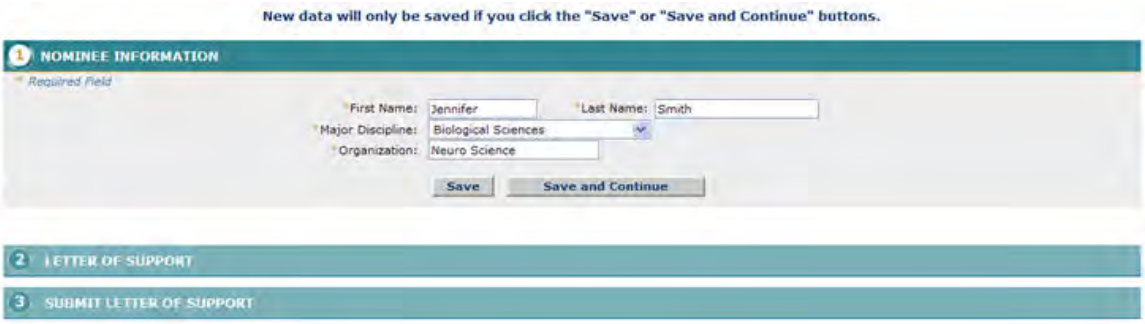


Figure 3 Nominee Form screen.

Save a Letter of Support for the National Medal of Science

After you have completed at least the first section of a Letter of Support, you can save it for future work.

1. Access the **Letter of Support Form** screen (Figure 1) and complete at least the first section of the letter of support (see Complete the Letter of Support Form).

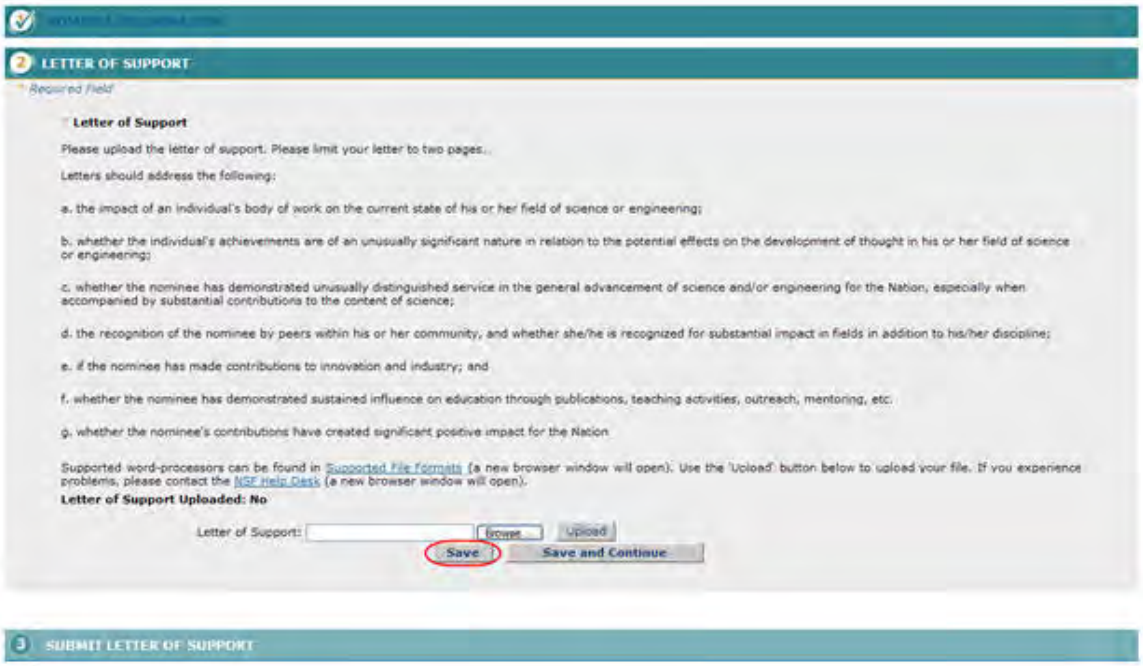


Figure 1 Letter of Support Form screen. The Save button is circled.

2. On the **Letter of Support Form** screen (Figure 1), click the **Save** button. The letter of support is now listed on the **National Medal of Science** screen (Figure 2) with the status of **In Progress**.

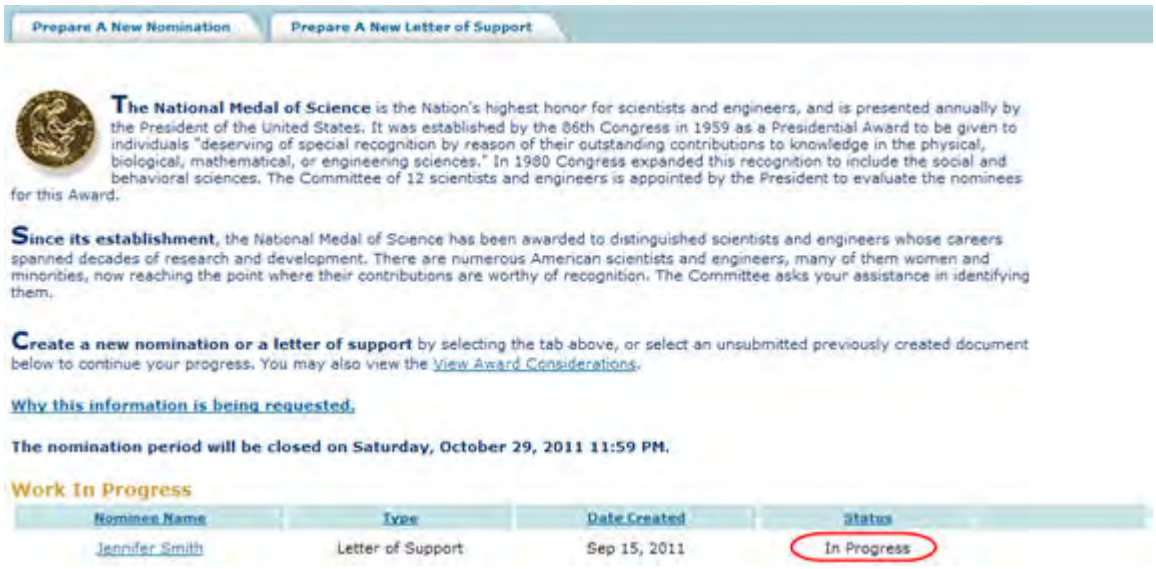


Figure 2 National Medal of Science screen. The letter of support is now listed with the status of In Progress.

Submit a Saved Letter of Support for the National Medal of Science

1. Access the **Honorary Awards** screen (Figure 1) (see Log In to Honorary Awards).

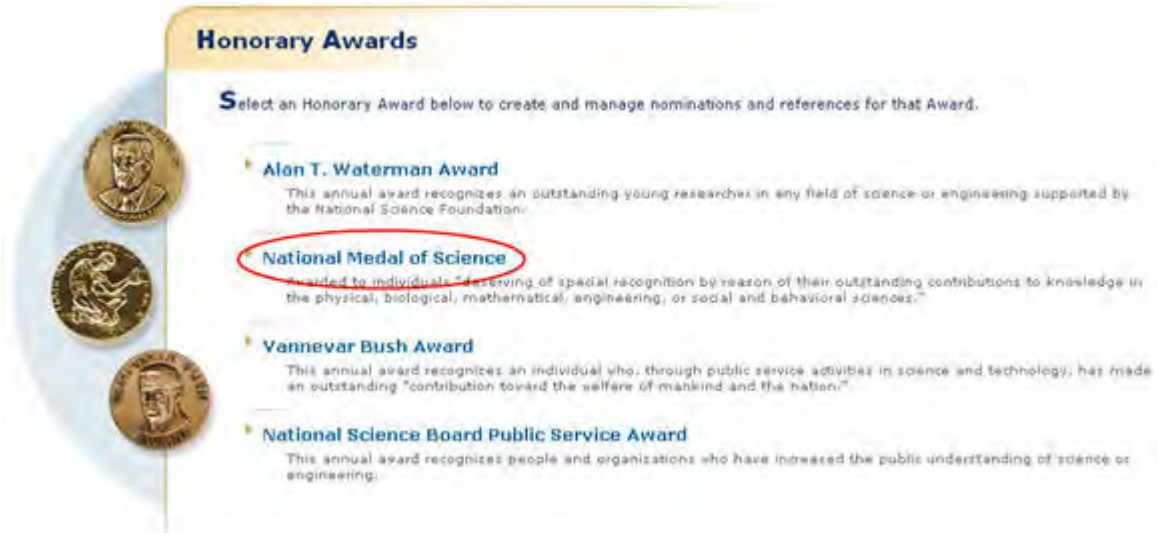


Figure 1 Honorary Awards screen. The National Medal of Science link is circled.

2. On the **Honorary Awards** screen (Figure 1), click **National Medal of Science**. The **National Medal of Science** screen displays (Figure 2) with the Letter of Support listed in the **Work in Progress** section.

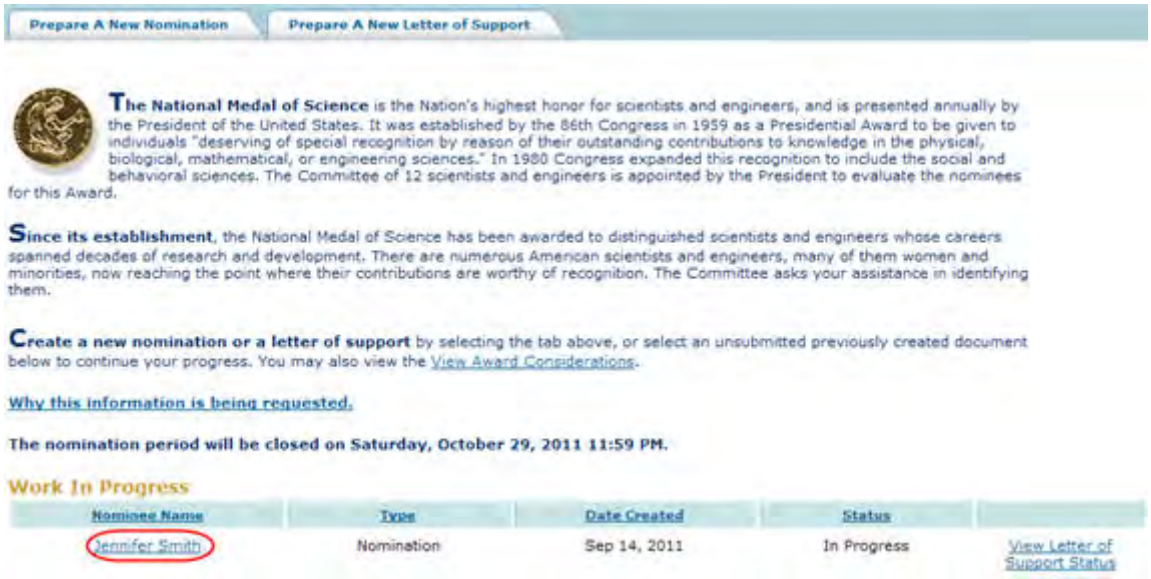


Figure 2 National Medal of Science button. The Letter of Support title link is circled.

3. Click the title of the Letter of Support (Figure 2). The **Letter of Support Form** screen displays (Figure 3).

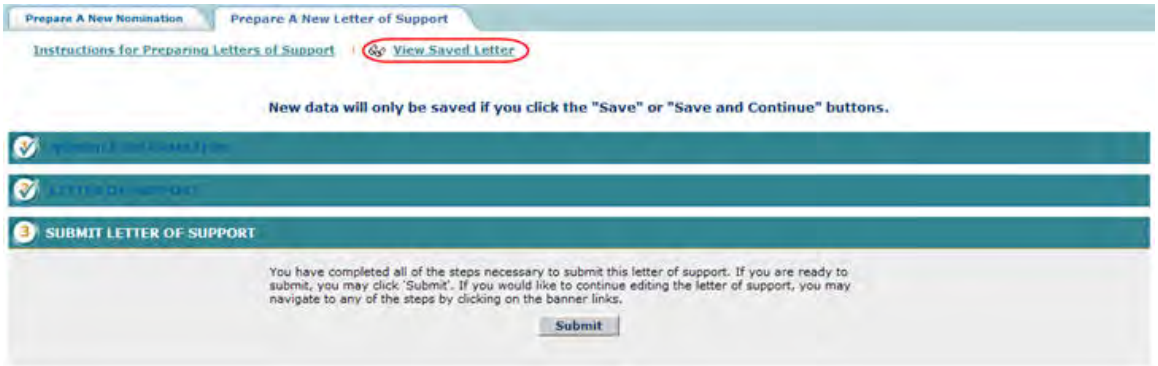


Figure 3 Letter of Support Form screen. The View Saved Letter of Support link is circled.

4. Click **View Saved Letter of Support** (Figure 3). The **View Entire Letter of Support** screen displays (Figure 4).

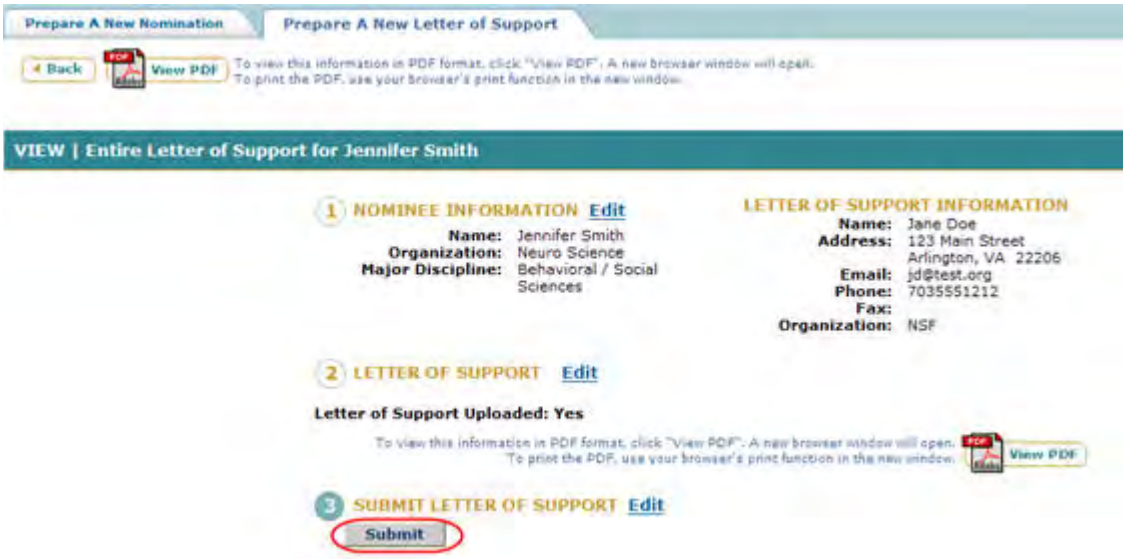


Figure 4 View Entire Letter of Support Screen. The Submit button is circled.

5. Click the **Submit** button (Figure 4). The **Confirm Award Letter of Support Submission** screen displays (Figure 5).

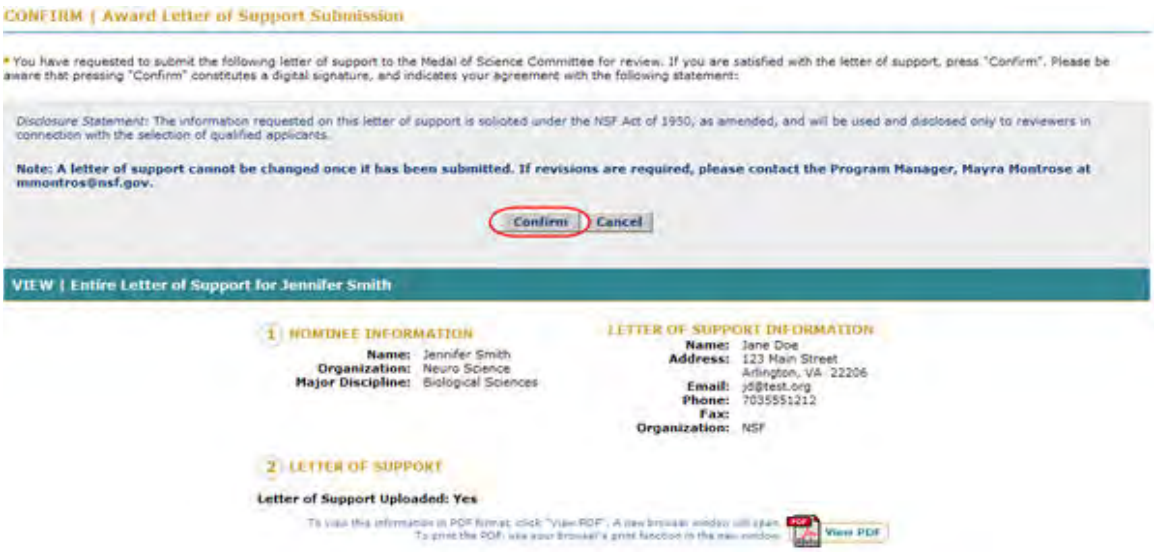


Figure 5 Confirm Award Letter of Support Submission screen. The Confirm button is circled.

6. Click the **Confirm** button (Figure 5). The **Confirmation** screen displays (Figure 6).

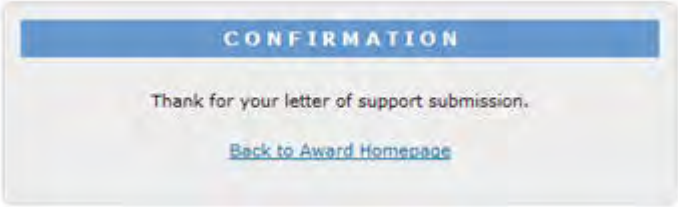


Figure 6 Confirmation screen.

7. Click **Back to Award Homepage** (Figure 6). The **National Medal of Science** screen displays (Figure 7) with the Letter of Support listed with the status of Submitted.

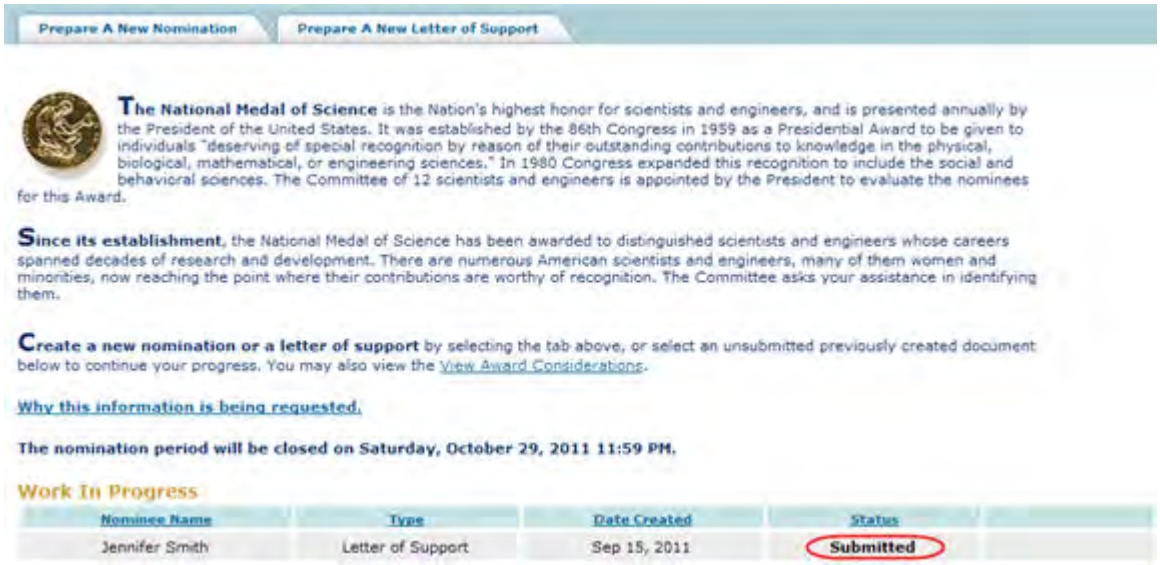


Figure 7 National Medal of Science screen with the Letter of Support listed with the status of Submitted.

View the Entire Letter of Support for the National Medal of Science

1. Access the **Honorary Awards** screen (Figure 1) (see Log In to Honorary Awards).

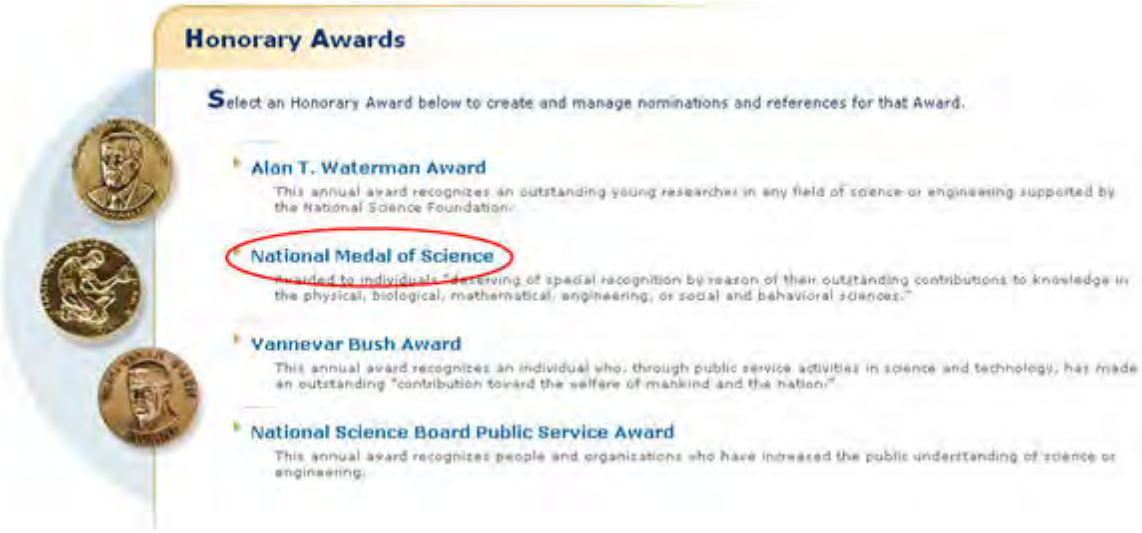


Figure 1 Honorary Awards screen. The National Medal of Science link is circled.

2. On the **Honorary Awards** screen (Figure 1), click **National Medal of Science**. The **National Medal of Science** screen displays (Figure 2).

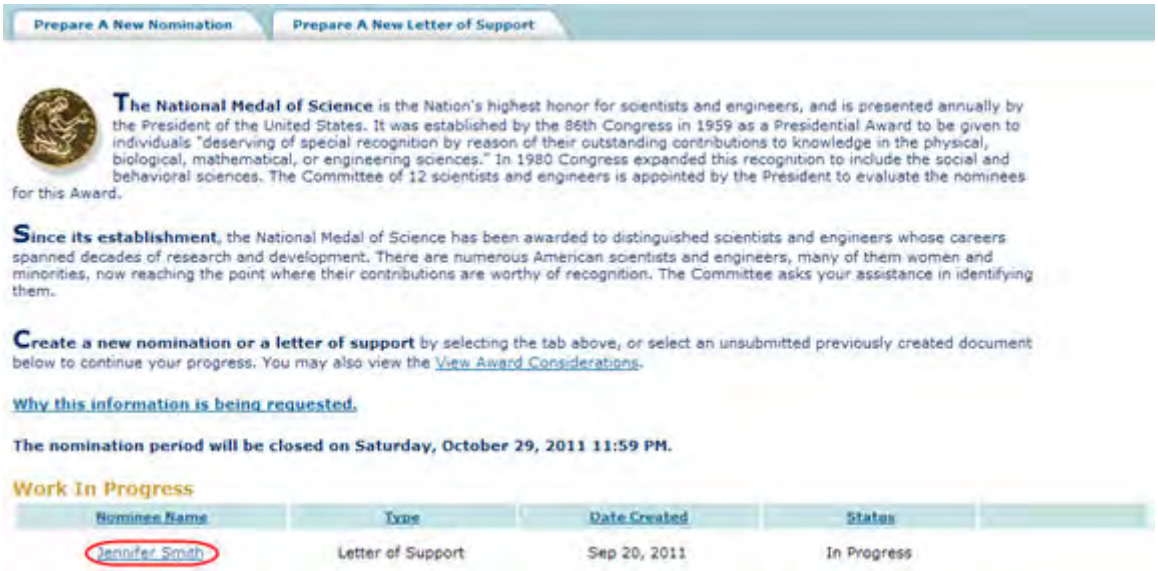


Figure 2 National Medal of Science screen. The Letter of Support title link is circled.

3. Click the title of the Letter of Support (Figure 2). The **Letter of Support Form** screen displays (Figure 3).

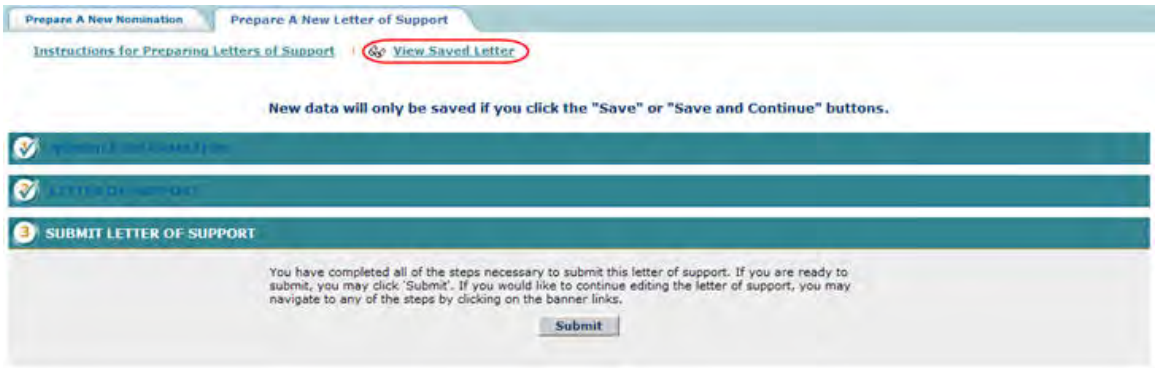


Figure 3 Letter of Support Form screen. The View Saved Letter of Support link is circled.

4. Click **View Saved Letter of Support** (Figure 3). The **View Entire Letter of Support** screen displays with the text you have entered (Figure 4).

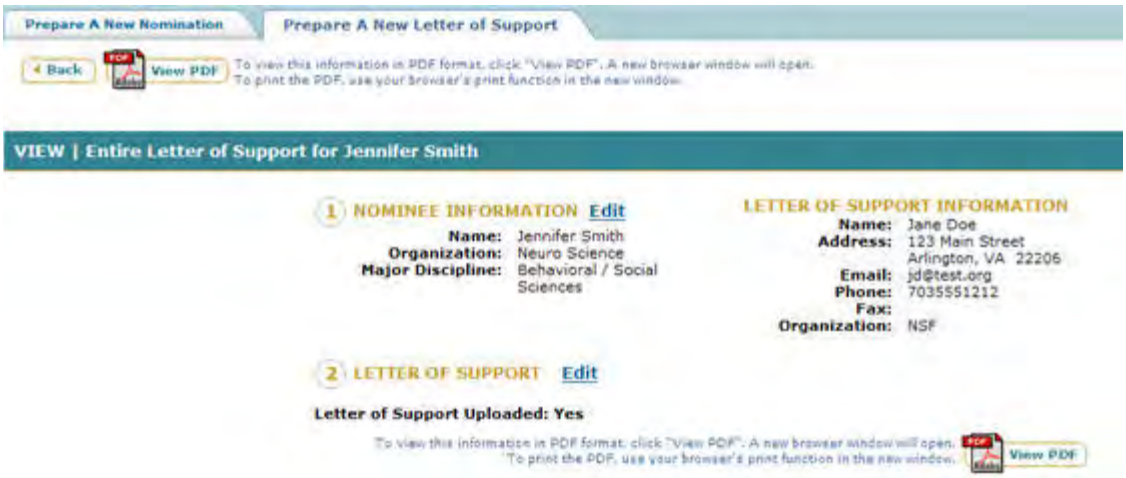


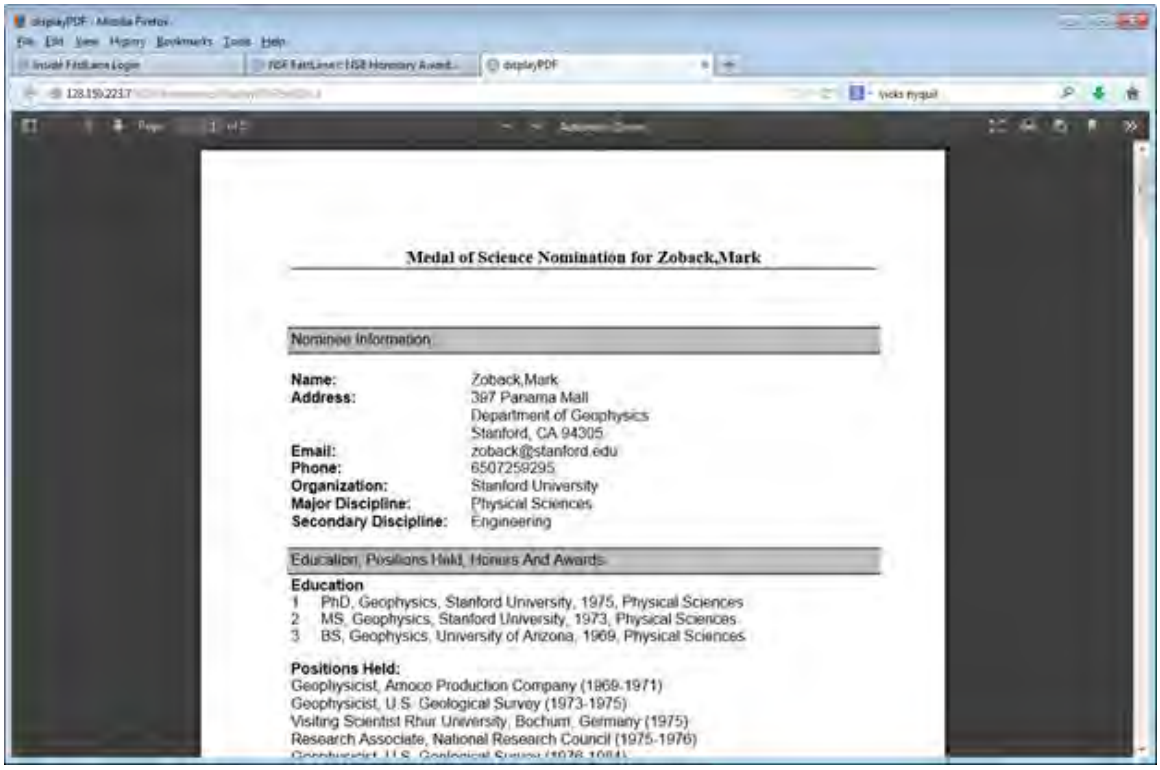
Figure 4 View Entire Letter of Support screen.

View the Letter of Support in PDF for the National Medal of Science

1. Access the **View Entire Letter of Support** screen (Figure 1) (see View Entire Letter of Support).

Figure 1 Letter of Support screen. The View PDF link is circled.

2. On the **View Entire Letter of Support** screen (Figure 1), click **View PDF**. The Letter of Support displays in PDF format in a new window (Figure 2).



Medal of Science Nomination for Zoback,Mark

Nominee Information

Name: Zoback,Mark
Address: 397 Panama Mall
Department of Geophysics
Stanford, CA 94305
Email: zoback@stanford.edu
Phone: 6507259295
Organization: Stanford University
Major Discipline: Physical Sciences
Secondary Discipline: Engineering

Education, Positions Held, Honors And Awards

Education
1 PhD, Geophysics, Stanford University, 1975, Physical Sciences
2 MS, Geophysics, Stanford University, 1973, Physical Sciences
3 BS, Geophysics, University of Arizona, 1969, Physical Sciences

Positions Held:
Geophysicist, Amoco Production Company (1969-1971)
Geophysicist, U.S. Geological Survey (1973-1975)
Visiting Scientist Rhur University, Bochum, Germany (1975)
Research Associate, National Research Council (1975-1976)

Figure 2 Letter of Support in PDF format.

Vannevar Bush Award

Vannevar Bush Award Introduction

The Vannever Bush Award is given annually in recognition of an individual who, through public service activities in science and technology, has made an outstanding "contribution toward the welfare of mankind and the nation."

Access the **Honorary Awards** screen (Figure 1) (see Register for Honorary Awards or Log In to Honorary Awards).

Figure 1 Honorary Awards screen. The Vannevar Bush Award link is circled.

On the **Honorary Awards** screen (Figure 1), click **Vannevar Bush Award**. The user is redirected to the National Science Board, Awards page

Public Service Award

National Science Board Public Service Award Introduction

The National Science Board Public Service Award is given annually in recognition of people and organizations who have increased the public understanding of science or engineering.

You have the following options in preparing a Public Service Award:

Access the **Honorary Awards** screen (Figure 1) (see Register for Honorary Awards or Log In to Honorary Awards).

Figure 1 Honorary Awards screen. The National Science Board Public Service Award link is circled.

On the **Honorary Awards** screen (Figure 1), click **National Science Board Public Service Award**. The user is redirected to the National Science Board website

Postdoctoral Fellowships and Other Programs

Introduction to Postdoctoral Fellowship and Other Programs

Print the contents of the Postdoctoral Fellowship and Other Programs book.

Fellowships are standard grants made to organizations or individuals at the graduate and/or postdoctoral level and normally to support research and training. For the postdoctoral level, the National Science Foundation (NSF) supports research in science disciplines.

The purpose of the application is to enable applicants to easily find a program for application. Postdoctoral Fellowship applications will be submitted using the Proposal Preparation application on FastLane.

The FastLane systems support proposal preparation and submission for Postdoctoral Fellowships. However, you must first register through the Postdoctoral Fellowship Registration system (https://www.fastlane.nsf.gov/n1/N1IndvReg.html).

Access the Postdoctoral Fellowships from the **FastLane Home Page** screen as seen in the red circle on Figure 1. Select **Postdoctoral Fellowships and Other Programs** from the list of FastLane options just below the FastLane logo.

Figure 1 FastLane Home Page. The Postdoctoral Fellowships and Other Programs menu selection is circled in red.

That selection takes you to the **Postdoctoral Fellowships and Other Programs** screen (Figure 2).

Figure 2 Postdoctoral Fellowships and Other Programs screen.

From that menu, you can select:

- I am an Applicant—Takes you to the NSF Postdoctoral Fellowships and Other Programs screen
- I am a Sponsoring Scientist—Takes you to the NSF Postdoctoral Fellowships and Other Programs screen
- I am a Letter of Reference Writer—Takes you to the Write a Letter of Reference screen
- Individual Registration—Takes you to the Postdoctoral Fellowship Registration screen
- PI/Co-PI Login Page—Takes you to the Proposals, Awards and Status screen
- Available Programs—Takes you to the NSF Postdoctoral Fellowships and Other Programs screen

Postdoctoral Fellowship and Other Programs is the module where applicants and sponsoring scientists acquire an overview of the postdoctoral programs NSF offers (Table 1).

Table 1 Postdoctoral Fellowship and Other Programs Applications

Application	Who	Activity
I am an Applicant	Applicant	Find the information on one of the postdoctoral

		and other programs, including instructions for applying.
I am a Sponsoring Scientist	Sponsoring Scientist	Find the information on one of the postdoctoral and other programs and special information for Sponsoring Scientists.
I am a Letter of Reference Writer	Letter of Reference Writer	Prepare and submit to NSF a Letter of Reference and a rating sheet for a postdoctoral Fellowship applicant.
Individual Registration	Applicant	Register with FastLane as an individual (required for preparing a proposal for a Postdoctoral Fellowship).
PI/Co-PI Login Page	Applicant	Log in screen for Proposals, Awards, and Status to prepare a proposal, once you have registered with FastLane.
Available Programs	Applicant and Sponsoring Scientist	Find information on all available programs with Postdoctoral Fellowships.

Working in Postdoctoral Fellowship and Other Programs does not require registration with FastLane; however, preparing and submitting a proposal for a postdoctoral fellowship does require registration with FastLane.

The following persons work in Postdoctoral Fellowships and Other Programs:

- **Applicant**—Individual with a doctoral degree who is seeking a fellowship
- **Letter of Reference Writer**—Individual who has been asked by an applicant to submit a letter of reference to NSF concerning the applicant

Introduction to Postdoctoral Fellowship and Other Programs

Print the contents of the Postdoctoral Fellowship and Other Programs book.

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The purpose of the application is to enable applicants to easily find a program for application. Postdoctoral Fellowship applications will be submitted using the Proposal Preparation application on FastLane.

The FastLane systems support proposal preparation and submission for Postdoctoral Fellowships. However, you must first register through the Postdoctoral Fellowship Registration system (https://www.fastlane.nsf.gov/n1/N1IndvReg.html).

Access the Postdoctoral Fellowships from the **FastLane Home Page** screen as seen in the red circle on Figure 1. Select **Postdoctoral Fellowships and Other Programs** from the list of FastLane options just below the FastLane logo.

Figure 1 FastLane Home Page. The Postdoctoral Fellowships and Other Programs menu selection is circled in red.

That selection takes you to the **Postdoctoral Fellowships and Other Programs** screen (Figure 2).

Figure 2 Postdoctoral Fellowships and Other Programs screen.

From that menu, you can select:

- I am an Applicant—Takes you to the NSF Postdoctoral Fellowships and Other Programs screen
- I am a Sponsoring Scientist—Takes you to the NSF Postdoctoral Fellowships and Other Programs screen
- I am a Letter of Reference Writer—Takes you to the Write a Letter of Reference screen
- Individual Registration—Takes you to the Postdoctoral Fellowship Registration screen
- PI/Co-PI Login Page—Takes you to the Proposals, Awards and Status screen
- Available Programs—Takes you to the NSF Postdoctoral Fellowships and Other Programs screen

Postdoctoral Fellowship and Other Programs is the module where applicants and sponsoring scientists acquire an overview of the postdoctoral programs NSF offers (Table 1).

Table 1 Postdoctoral Fellowship and Other Programs Applications

Application	Who	Activity
I am an Applicant	Applicant	Find the information on one of the postdoctoral and other programs, including instructions for applying.
I am a Sponsoring Scientist	Sponsoring Scientist	Find the information on one of the postdoctoral and other programs and special information for Sponsoring Scientists.
I am a Letter of Reference Writer	Letter of Reference Writer	Prepare and submit to NSF a Letter of Reference and a rating sheet for a postdoctoral Fellowship applicant.
Individual Registration	Applicant	Register with FastLane as an individual (required for preparing a proposal for a Postdoctoral Fellowship).
PI/Co-PI Login Page	Applicant	Log in screen for Proposals, Awards, and Status to prepare a proposal, once you have registered with FastLane.
Available Programs	Applicant and Sponsoring Scientist	Find information on all available programs with Postdoctoral Fellowships.

Working in Postdoctoral Fellowship and Other Programs does not require registration with FastLane; however, preparing and submitting a proposal for a postdoctoral fellowship does require registration with FastLane.

The following persons work in Postdoctoral Fellowships and Other Programs:

- **Applicant**—Individual with a doctoral degree who is seeking a fellowship
- **Letter of Reference Writer**—Individual who has been asked by an applicant to submit a letter of reference to NSF concerning the applicant

NSF Postdoctoral Fellowships and Other Programs

This screen lists the variable available Postdoctoral Fellowships and Other Programs. Researchers can apply for the following fellowships through the National Science Foundation:

- American Competitiveness in Chemistry-Fellowship (ACC-F)
- CEDAR, GEM and SHINE Postdoctoral Research
- East Asia and Pacific Summer Institutes for U.S. Graduate Students (EAPSI)
- International Research Fellowship Program
- Mathematical Sciences Postdoctoral Research Fellowships (MSPRF)
- NSF Astronomy and Astrophysics Postdoctoral Fellowships (AAPF)
- NSF Earth Sciences Postdoctoral Fellowships (EAR-PF)
- Postdoctoral Fellowships in Polar Regions Research
- Postdoctoral Research Fellowships in Biology
- SBE Minority Postdoctoral Research Fellowships and Follow-up Research Starter Grants
- Science, Technology, and Society (STS)

When you select one of the above links, it takes you to that program's description page.

General Process

To apply for a fellowship, you must do the following:

1. Register as an independent researcher with the Postdoctoral Fellowship Registration system.
2. Print and read the program solicitation.
3. Review the program details.
4. Prepare the documents.
5. Access Proposal Preparation through the FastLane Proposals, Awards and Status module.

See also:

- Postdoctoral Fellowship Registration
- How to Apply (for Applicants)

- View Past Award Winners
- View Award-Specific Program Announcement
- Postdoctoral Fellowship Contacts

View Award-Specific Program Announcement

To view award-specific program announcements, do the following:

1. Access FastLane and select the Postdoctoral Fellowships application (see Introduction to Postdoctoral Fellowship and Other Programs).

2. Select the **I am an Applicant GO** button. The **NSF Postdoctoral Research Fellowships and Other Programs** screen (Figure 1) displays with a variable list of available fellowships.

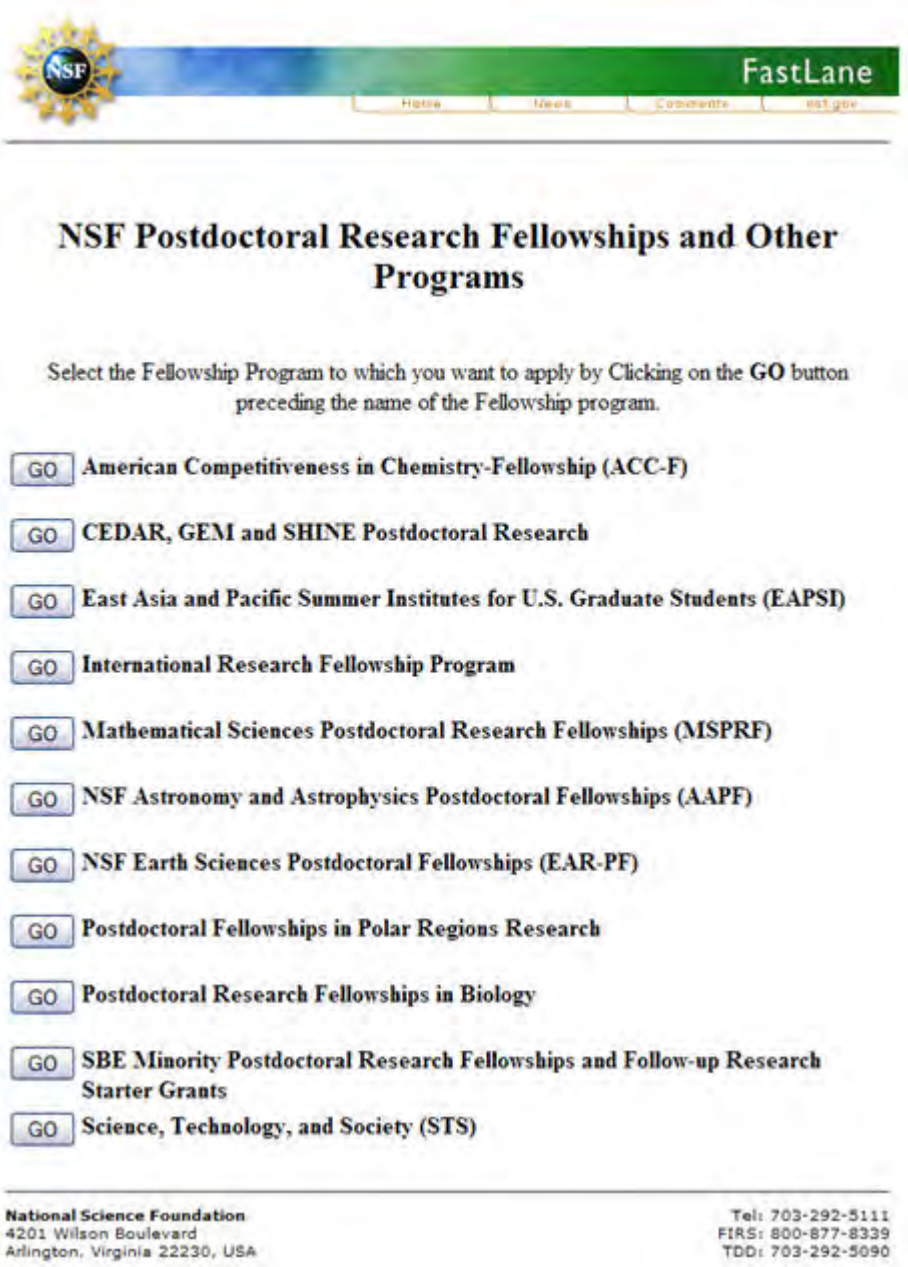


Figure 1 List of NSF Postdoctoral Fellowships and Other Programs currently available.

3. Select the **GO** button for the program you are interested in viewing (e.g., **Mathematical Sciences Postdoctoral**

Research Fellowships).
Information on that program
displays (Figure 2).

FastLane

NSF Postdoctoral Research Fellowships and Other Programs

Mathematical Sciences Postdoctoral Research Fellowships

Deadline: Oct 18, 2006 / Oct 19, 2007

GO Program Announcement

GO How to Apply

GO Past Awards

Contact: Lloyd Douglas
Phone: 703-292-4862
Email: msprf@nsf.gov

Program Description

The purpose of the Mathematical Sciences Postdoctoral Research Fellowships (MSPRF) is to support future leaders in the mathematical sciences by enabling them to participate in research environments that will have maximal impact on their future scientific development. There will be two options for awardees: Research Fellowship and Research Instructorship. Awards will be made for appropriate research in areas of the mathematical sciences, including applications to other disciplines.

For all programs, a complete application package must be submitted to NSF by the published deadline.

National Science Foundation
4201 Wilson Boulevard
Arlington, Virginia 22230, USA

Tel: 703-292-5111
FIRS: 800-877-8339
TDD: 703-292-5090

Figure 2 Program information for Applicants and Available Programs selection.

Each of these pages has the following links:

a. Program Announcement

b. How to Apply (for Applicants and Available Programs selection) or

c. How to Prepare Statement (for Sponsoring Scientist selection)

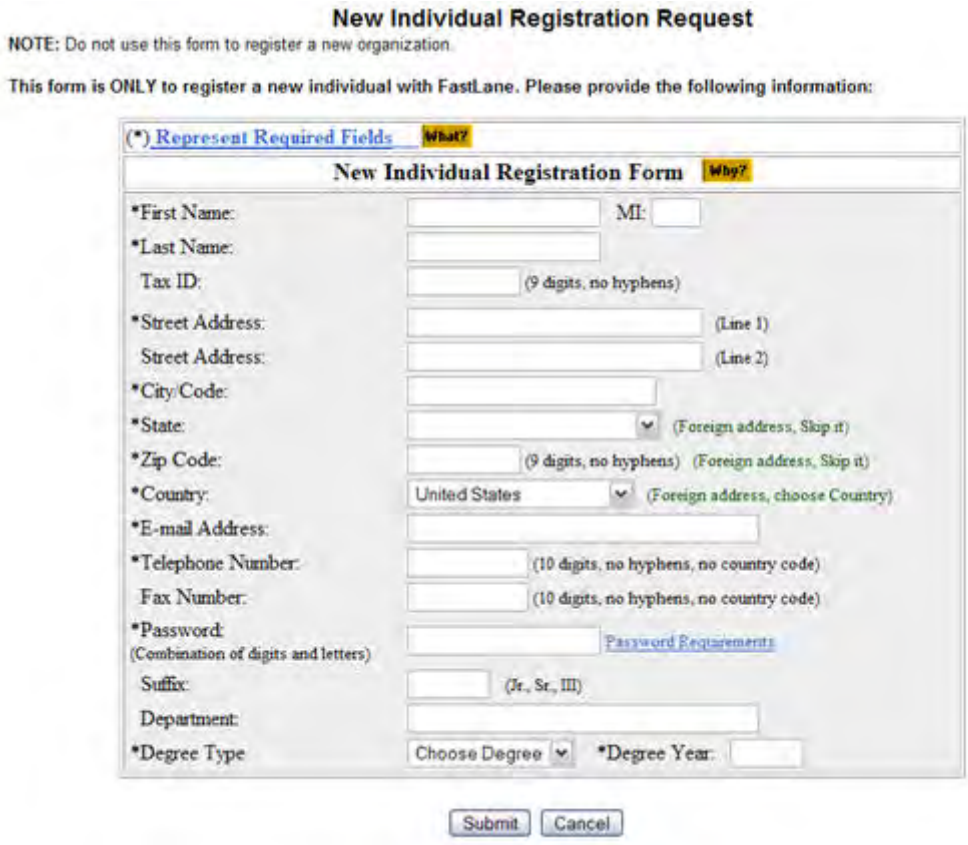
d. Past Awards

4. Select the **GO** button for Program Announcement. The program's information screen displays (see Figure 3).

Postdoctoral Fellowship Registration

To register as an independent researcher with the Postdoctoral Fellowship system, do the following:

Access the Postdoctoral Fellowship Registration system (https://www.fastlane.nsf.gov/n1/N1IndvReg.html) (Figure 1) in the following way:



New Individual Registration Request

NOTE: Do not use this form to register a new organization.

This form is ONLY to register a new individual with FastLane. Please provide the following information:

(*) Represent Required Fields What?

New Individual Registration Form Why?

*First Name: MI:
*Last Name:
Tax ID: (9 digits, no hyphens)
*Street Address: (Line 1)
Street Address: (Line 2)
*City/Code:
*State: (Foreign address, Skip it)
*Zip Code: (9 digits, no hyphens) (Foreign address, Skip it)
*Country: United States (Foreign address, choose Country)
*E-mail Address:
*Telephone Number: (10 digits, no hyphens, no country code)
Fax Number: (10 digits, no hyphens, no country code)
*Password: (Combination of digits and letters) Password Requirements
Suffix: (Jr., Sr., III)
Department:
*Degree Type Choose Degree *Degree Year:

Submit Cancel

Figure 1 New Individual Registration Request screen.

Link directly to the application (https://www.fastlane.nsf.gov/n1/N1IndvReg.html). The **Postdoctoral Fellowship Registration** screen displays as in Figure 2.

Figure 2 Postdoctoral Fellowship Registration screen.

1. Select the **Continue** button (Figure 2). The **Rules of Behavior** screen displays (see Figure 3).

Figure 3 Rules of Behavior screen.

2. Check the **I have read and accept the Rules of Behavior** box on the **Rules of Behavior** screen.
3. Select the **Accept** button on the **Rules of Behavior** screen. The **New Individual Registration Request** screen displays (Figure 1).
4. Complete the **New Individual Registration Request** screen's required fields [noted with an asterisk (*)] as seen in Figure 4.

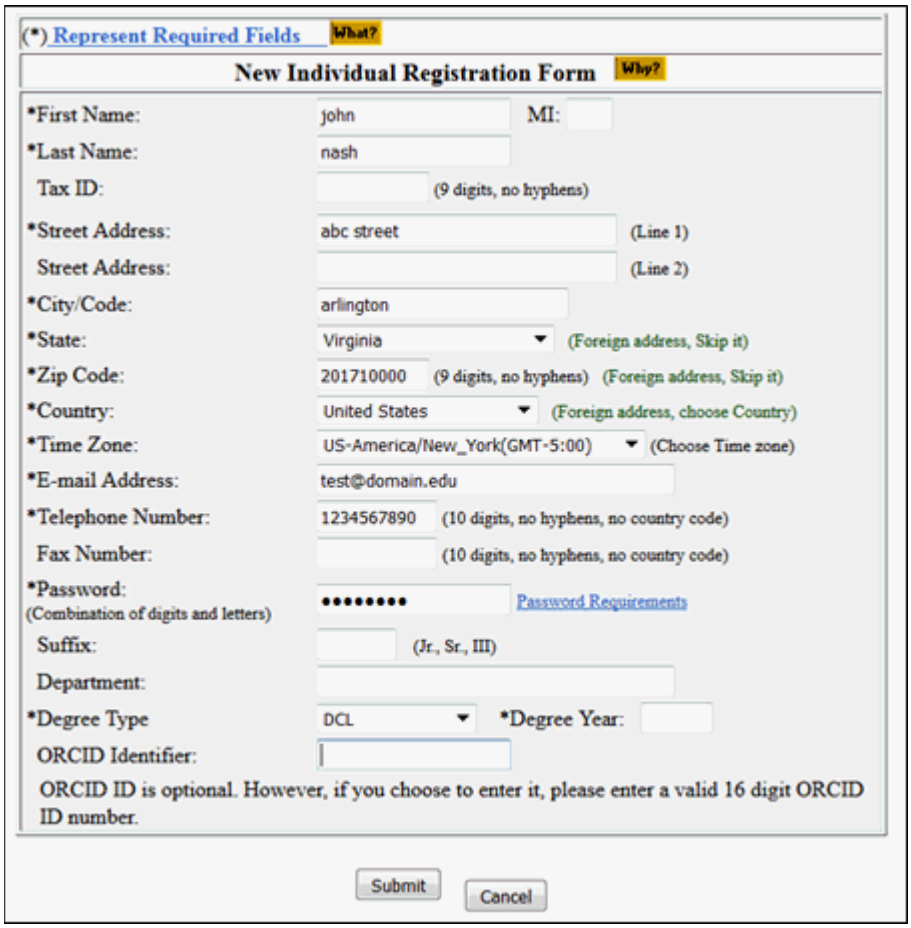
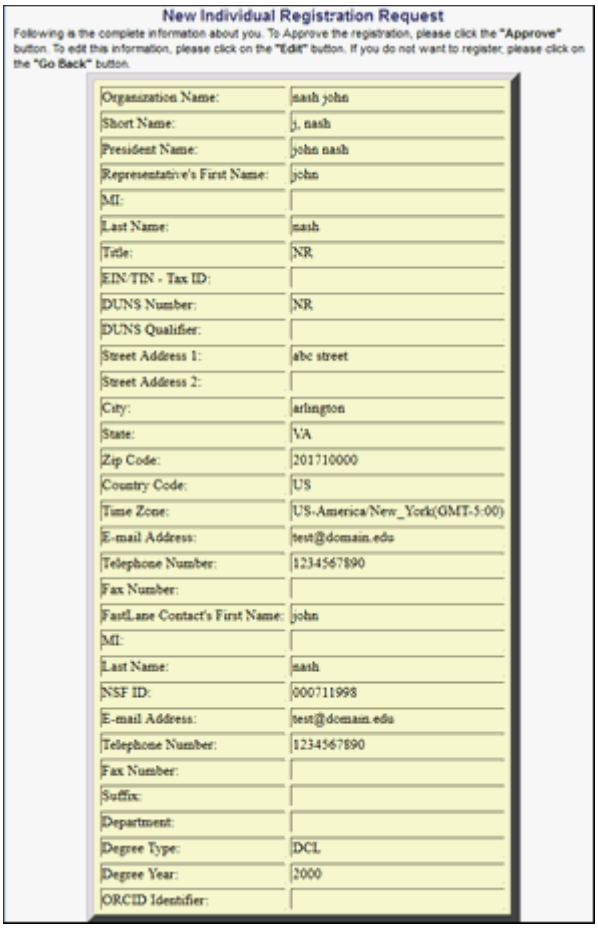


Figure 4 New Individual Registration Request screen.

5. Select the **Submit** button (Figure 4). The **New Individual Registration Request** screen returns with the information you entered (Figure 5).



New Individual Registration Request

Following is the complete information about you. To Approve the registration, please click the **"Approve"** button. To edit this information, please click on the **"Edit"** button. If you do not want to register, please click on the **"Go Back"** button.

Organization Name:	nash john
Short Name:	j. nash
President Name:	john nash
Representative's First Name:	john
MI:	
Last Name:	nash
Title:	NR
EIN/TIN - Tax ID:	
DUNS Number:	NR
DUNS Qualifier:	
Street Address 1:	abc street
Street Address 2:	
City:	arlington
State:	VA
Zip Code:	201710000
Country Code:	US
Time Zone:	US-America/New_York(GMT-5:00)
E-mail Address:	test@domain.edu
Telephone Number:	1234567890
Fax Number:	
FastLane Contact's First Name:	john
MI:	
Last Name:	nash
NSF ID:	000711998
E-mail Address:	test@domain.edu
Telephone Number:	1234567890
Fax Number:	
Suffix:	
Department:	
Degree Type:	DCL
Degree Year:	2000
ORCID Identifier:	

Figure 5 Fellowship Individual Registration screen with the form completed.

6. Select the **Approve** button (Figure 5). A screen displays (Figure 6) with a message that you are registered successfully.

New Organization, FastLane Contact and PI Registration is Successful

The applicant has been successfully registered in FastLane as a new organization, the FastLane Contact for the organization and as a PI. The FastLane Contact has been notified by an electronic mail message at the address: **john.doe@nsf.com** . Please click the continue button to complete the process.

Continue

Figure 6 Postdoctoral Registration confirmation screen.

7. Select the **Continue** button (Figure 6). The **FastLane Home Page** screen displays (Figure 7).

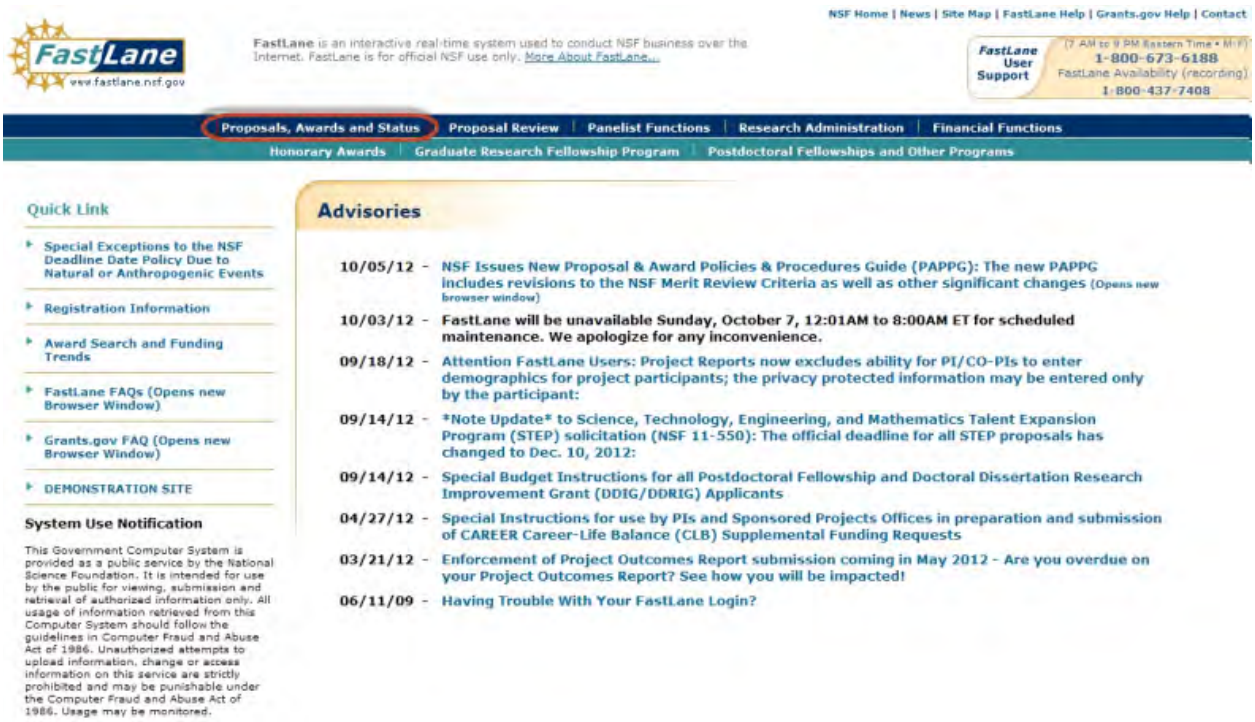


Figure 7 FastLane Home Page screen. Proposals, Awards and Status is circled in red.

8. Select Proposals, Awards and Status (as seen in Figure 7). The Proposals, Awards and Status screen displays (Figure 8).

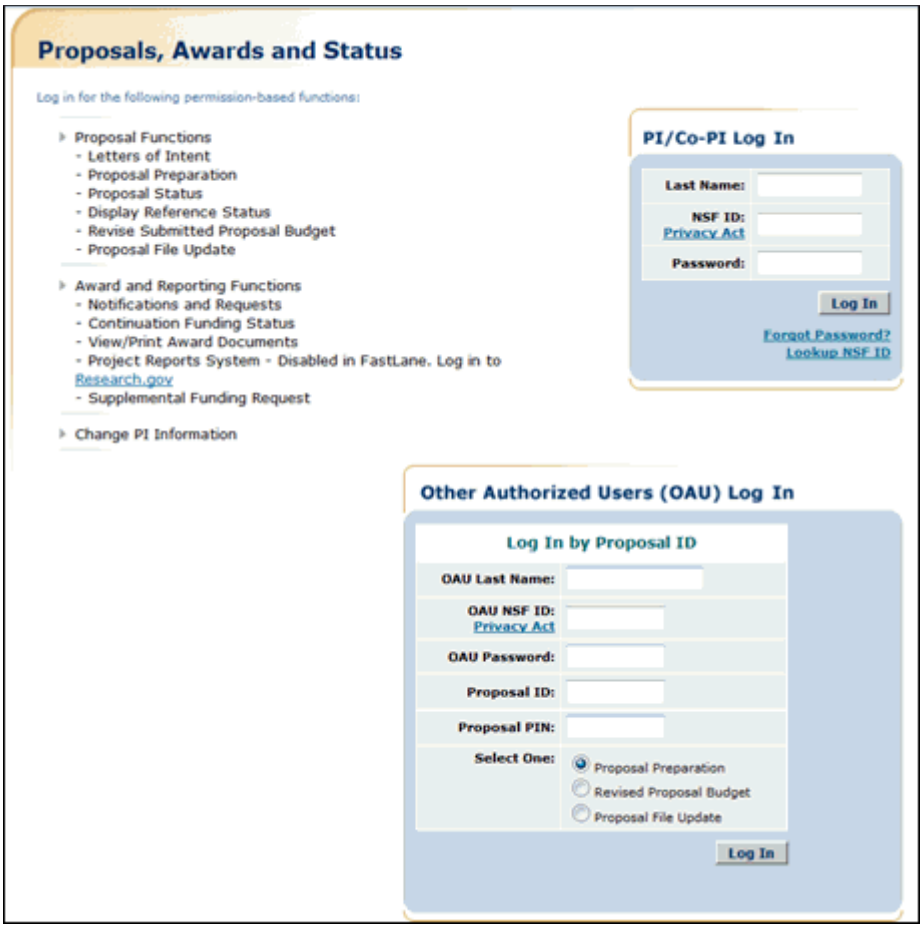


Figure 8 Proposals, Awards and Status screen. The PI/Co-PI login section is circled in red.

9. Complete the PI/Co-PI log in information (Figure 8). Select the **Log In** button. The first time you log in, you will be redirected to Research.gov to change your password. Once you reset your password in Research.gov use the updated password to login to FastLane.

10. Enter a new password and then select the **OK** button (Figure 9). The **What Do You Want To Work On?** screen displays (Figure 10).

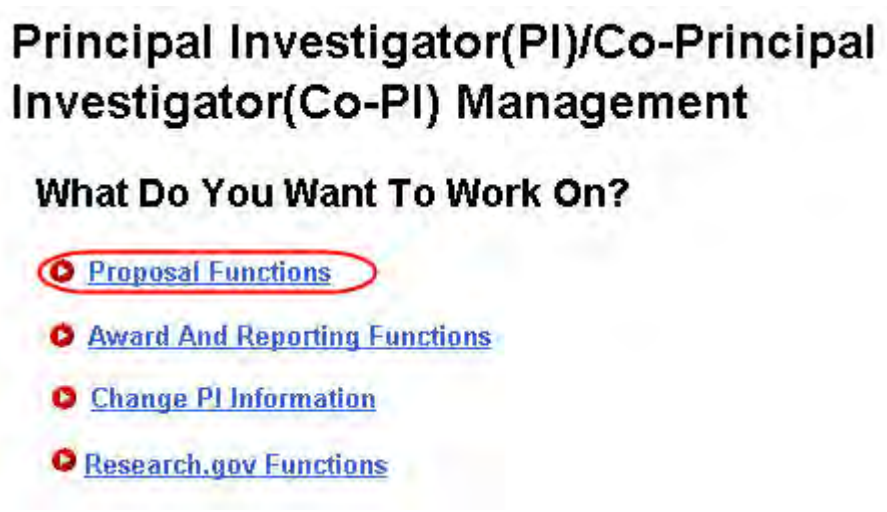


Figure 10 What Do You Want To Work On? screen. Proposal Functions is circled in red.

11. Select the **Proposal Functions** link. The **Proposal Functions** screen displays (Figure 11).

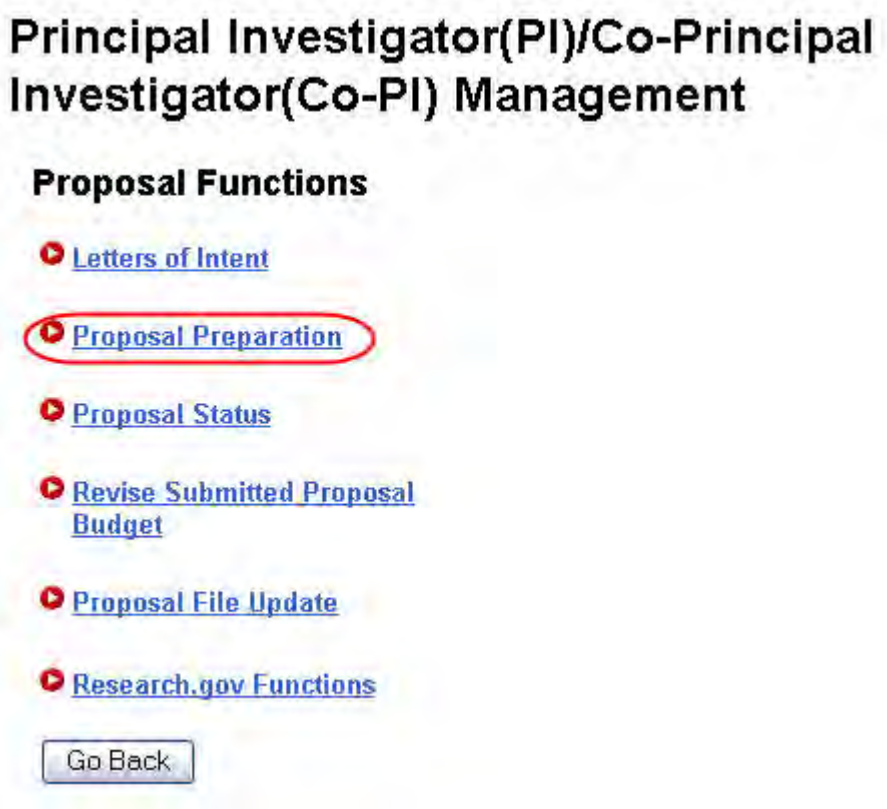
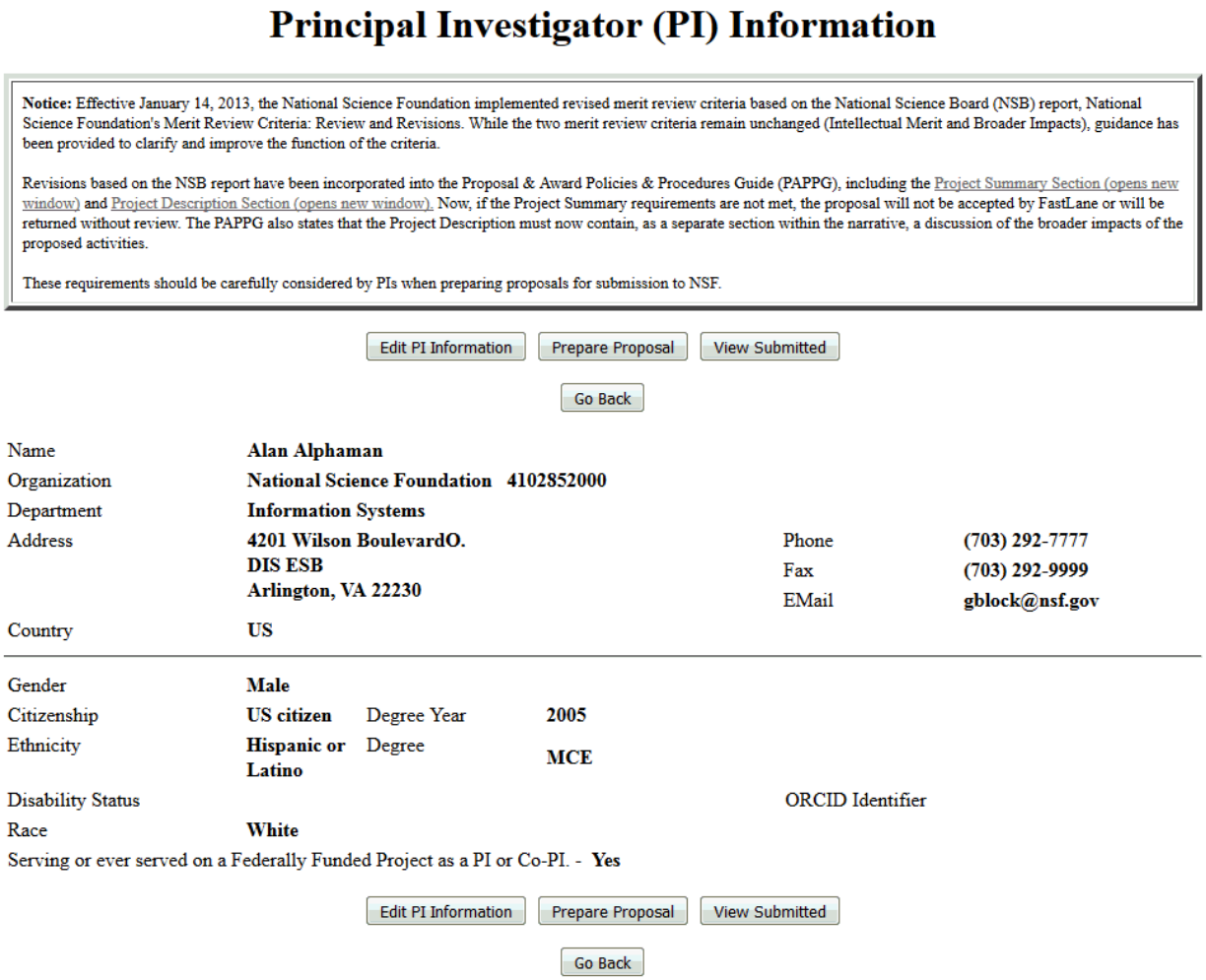


Figure 11 Proposal Functions screen. Proposal Preparation is circled in red.

12. Select the **Proposal Preparation** link (Figure 11). The **Principal Investigator (PI) Information** screen (Figure 12) displays.

13. On the **Principal Investigator (PI) Information** screen, scroll down and check your information. Your organization must have you listed as an individual researcher. Your organization code will begin with a "P."



Principal Investigator (PI) Information

Notice: Effective January 14, 2013, the National Science Foundation implemented revised merit review criteria based on the National Science Board (NSB) report, National Science Foundation's Merit Review Criteria: Review and Revisions. While the two merit review criteria remain unchanged (Intellectual Merit and Broader Impacts), guidance has been provided to clarify and improve the function of the criteria.

Revisions based on the NSB report have been incorporated into the Proposal & Award Policies & Procedures Guide (PAPPG), including the Project Summary Section (opens new window) and Project Description Section (opens new window). Now, if the Project Summary requirements are not met, the proposal will not be accepted by FastLane or will be returned without review. The PAPPG also states that the Project Description must now contain, as a separate section within the narrative, a discussion of the broader impacts of the proposed activities.

These requirements should be carefully considered by PIs when preparing proposals for submission to NSF.

Edit PI Information | Prepare Proposal | View Submitted

Go Back

Name	**Alan Alphaman**		
Organization	**National Science Foundation 4102852000**		
Department	**Information Systems**		
Address	**4201 Wilson BoulevardO.** **DIS ESB** **Arlington, VA 22230**	Phone Fax EMail	**(703) 292-7777** **(703) 292-9999** **gblock@nsf.gov**
Country	**US**		

Gender	**Male**		
Citizenship	**US citizen**	Degree Year	**2005**
Ethnicity	**Hispanic or Latino**	Degree	**MCE**
Disability Status		ORCID Identifier	
Race	**White**		

Serving or ever served on a Federally Funded Project as a PI or Co-PI. - **Yes**

Edit PI Information | Prepare Proposal | View Submitted

Go Back

Figure 12 Principal Investigator (PI) Information screen. The Organization code is circled in red.

14. Review your information (Figure 12). If it is not correct, select the **Edit** button and update your information. When you have completed the changes, select the **Save** button to continue.
15. See Prepare a Proposal for instructions on how to prepare a proposal for your selected fellowship.

See also:

- How to Apply (for Applicants)
- How to Apply (for Sponsoring Scientists)
- View Award-Specific Program Announcement
- Postdoctoral Fellowship Contacts

How to Apply (for Applicants)

1. Access FastLane and select **NSF Postdoctoral Fellowships and Other Programs** (see Introduction_to_Postdoctoral_Fellowship_and_Other_Programs).

2. Select the **GO** button for I am an Applicant. The **NSF Postdoctoral Research Fellowships and Other Programs** screen displays (Figure 1) with a list of available fellowships.

Figure 1 List of NSF Postdoctoral Fellowships and Other Programs currently available.

3. Select the **GO** button of the program you are interested in

viewing (e.g., **Mathematical Sciences Postdoctoral Research Fellowships**). A screen displays (Figure 2) with information on that fellowship.

FastLane

NSF Postdoctoral Research Fellowships and Other Programs

Mathematical Sciences Postdoctoral Research Fellowships

Deadline: Oct 18, 2006 / Oct 19, 2007

GO Program Announcement

GO How to Apply

GO Past Awards

Contact: Lloyd Douglas
Phone: 703-292-4862
Email msprf@nsf.gov

Program Description

The purpose of the Mathematical Sciences Postdoctoral Research Fellowships (MSPRF) is to support future leaders in the mathematical sciences by enabling them to participate in research environments that will have maximal impact on their future scientific development. There will be two options for awardees: Research Fellowship and Research Instructorship. Awards will be made for appropriate research in areas of the mathematical sciences, including applications to other disciplines.

For all programs, a complete application package must be submitted to NSF by the published deadline.

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Figure 2 Program announcement for Applicants.

4. Select the **GO** button for How to Apply (Figure 2). A screen displays (Figure 3) with specific instructions for how to apply for that particular fellowship.

NSF Postdoctoral Research Fellowships

Instructions for Preparing and Submitting
Mathematical Sciences Postdoctoral Research Fellowships (MSPRF)

Program Announcement

1. Eligibility.
2. Deadline Date.
3. Submission Tips.
4. You must register as an Individual Researcher.
5. Begin your application.
6. Prepare Cover Sheet.
7. Prepare Remainder of Cover Sheet.
8. Prepare Project Summary.
9. Prepare Project Description.
10. Prepare Biographical Sketches.
11. Add/Delete Letter of Reference Writers.
12. Status: Letters of Reference.
13. Create the Application Form.
14. Create Form B.
15. Sponsoring Scientist Statement.
16. Supplementary Docs.
17. Table of Contents.
18. Submit Application.
19. Letters of Reference.
20. Do NOT mail any forms to NSF.
21. College Transcripts.

1. **Eligibility.** Refer to program announcement NSF 05-510.

2. **Deadline Date.** 3rd Wednesday of October.

3. **Submission Tips:**
   a. Print and read the Program Solicitation.
   b. Prepare all documents according to guidelines in program announcement and the Grants Proposal Guide.
   c. Prepare all documents on a word processor with TrueType font, and then upload in FastLane.
   d. Register as an independent researcher (fellowships).
   e. Begin application early.
   f. Submit before the deadline.

4. **You must register as an Individual Researcher.** Click on Individual Registration. Fill in the required fields. Click on the Submit button. As soon as you click on the Approve button on the next screen, your password will be activated. There is no need for you to mail or FAX a signed copy of the registration to NSF.

Figure 3 Specific application instructions for Mathematical Sciences Postdoctoral Research Fellowships.

5. Note that the fourth step is Individual Registration. This will apply to all of the fellowships.

See also:

- How to Apply (for Sponsoring Scientists)
- Postdoctoral Fellowship Registration
- View Award-Specific Program Announcement
- Postdoctoral Fellowship Contacts

How to Apply (for Sponsoring Scientists)

1. Access FastLane and select **NSF Postdoctoral Fellowships and Other Programs** (see Introduction_to_Postdoctoral_Fellowship_and_Other_Programs).

2. Select the **GO** button for I am a Sponsoring Scientist. The **NSF Postdoctoral Research Fellowships and Other Programs** screen displays (Figure 1) with a list of available fellowships.

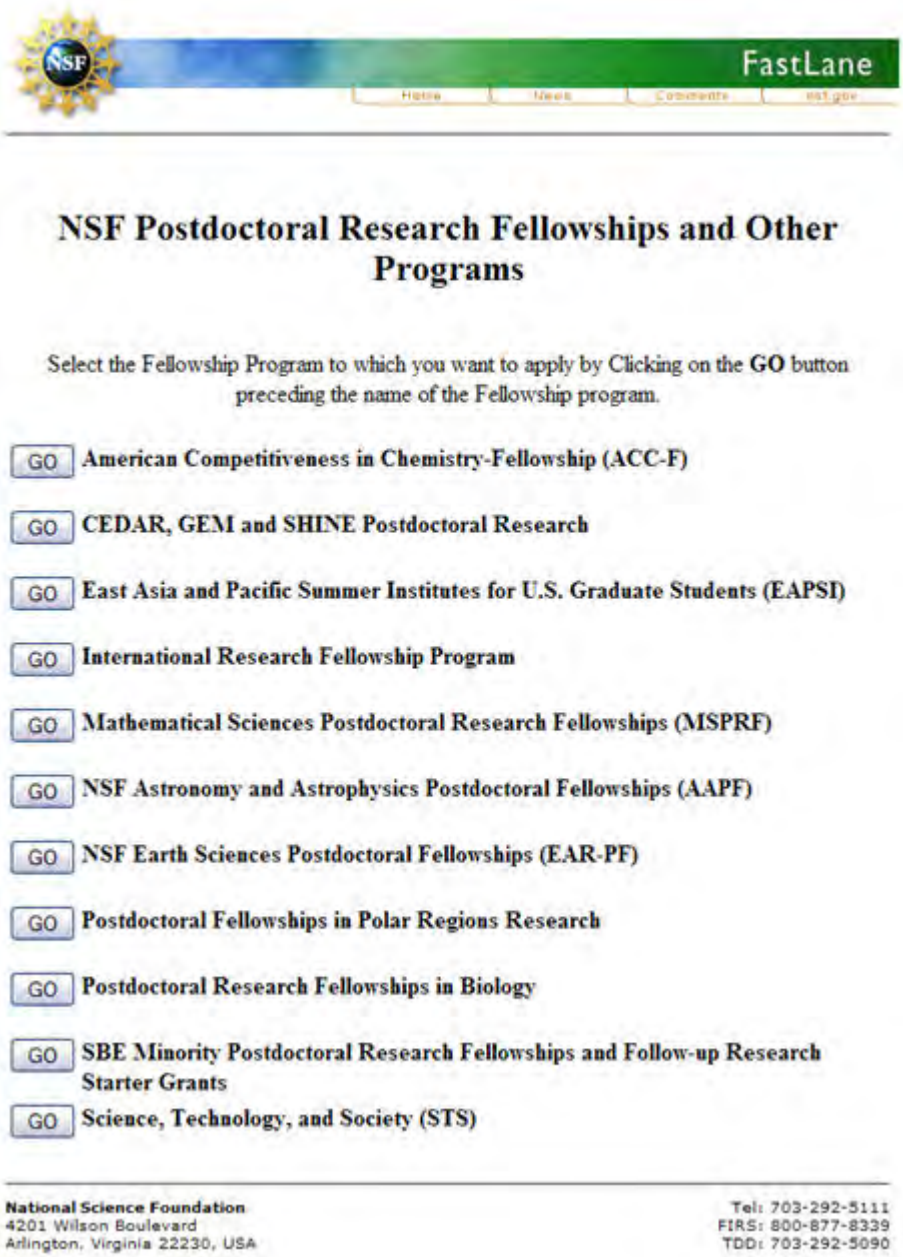

Figure 1 List of NSF Postdoctoral Fellowships and Other Programs currently available.

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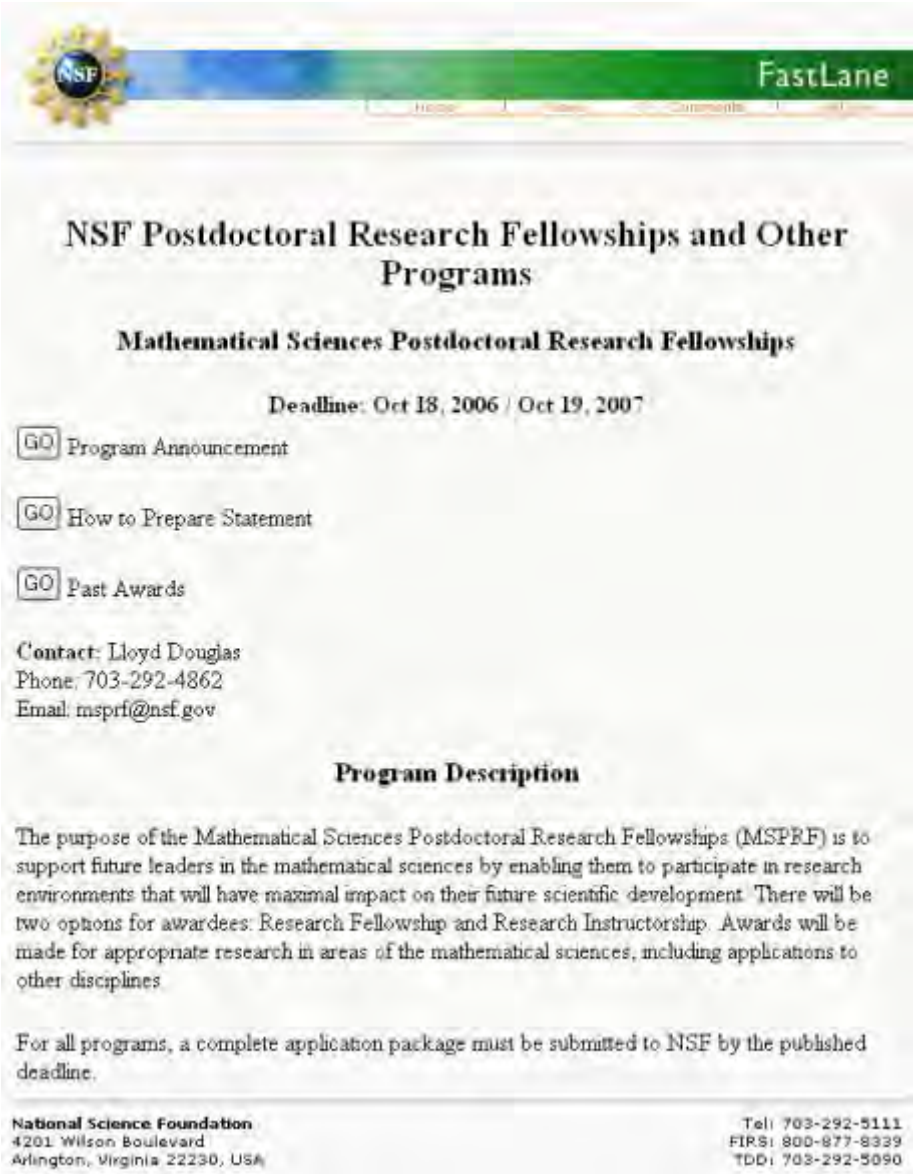

FastLane

NSF Postdoctoral Research Fellowships and Other Programs

Mathematical Sciences Postdoctoral Research Fellowships

Deadline: Oct 18, 2006 / Oct 19, 2007

GO Program Announcement

GO How to Prepare Statement

GO Past Awards

Contact: Lloyd Douglas
Phone: 703-292-4862
Email: msprf@nsf.gov

Program Description

The purpose of the Mathematical Sciences Postdoctoral Research Fellowships (MSPRF) is to support future leaders in the mathematical sciences by enabling them to participate in research environments that will have maximal impact on their future scientific development. There will be two options for awardees: Research Fellowship and Research Instructorship. Awards will be made for appropriate research in areas of the mathematical sciences, including applications to other disciplines.

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Figure 2 Program announcement for Sponsoring Scientists.

4. **Select the GO button for How to Prepare Statement (Figure 2). A screen displays (Figure 3) with specific instructions on how to prepare a statement for that particular fellowship.**

NSF Postdoctoral Research Fellowships

Instructions for Sponsoring Scientist
Mathematical Sciences Postdoctoral Research Fellowships (MSPRF)

1. The Fellow and the Proposed Sponsoring Scientist work together to get all the required forms filled out and submitted.
2. **Sponsoring Scientist Information**. Give the following information to the Fellow. The Fellow will include this information on the Application Form.

Proposed Fellowship Institution

Organization name:
Department:
Street:
City:
State:
ZIP:
Country:

Proposed Sponsoring Scientific Advisor:

Name:
Title:
E-mail address:
Telephone:
FAX:

3. **Sponsoring Scientist Statement**. The statement should indicate both expected availability for consultation during the requested tenure period and agreement to work with the Fellow. This statement should include a discussion of the role that the senior scientist will play in the professional development of the applicant and of the opportunities for training and research at the host institution that will be of particular benefit to the applicant. The Fellow will upload this statement within the application under Supplementary Docs.
4. **The NSF Program Officer information**.

Lloyd Douglas
703-292-4862

BS0725001

National Science Foundation
4201 Wilson Boulevard
Arlington, Virginia 22230, USA

Figure 3 Specific application instructions for Sponsoring Scientist Statement for Mathematical Sciences Postdoctoral Research Fellowships.

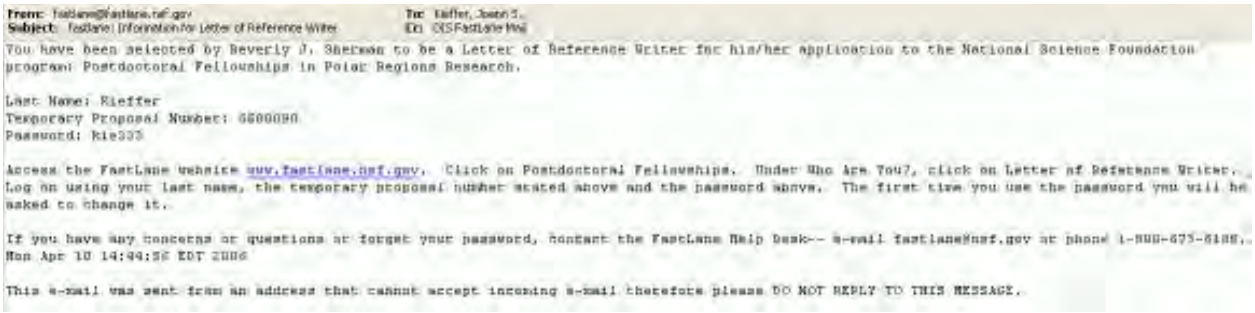
See also:

- Postdoctoral Fellowship Registration
- How to Apply (for Applicants)
- View Award-Specific Program Announcement
- Postdoctoral Fellowship Contacts

Write a Letter of Reference

1. If you have been asked to supply a letter of reference for an applicant, either the applicant will send you the necessary information to enter

this function, or FastLane will send you an e-mail similar to the one shown in Figure 1.


From: fastlane@fastlane.nsf.gov To: Kieffer, Joann S.
Subject: fastlane: Information for Letter of Reference Writer Cc: CISFastlane Mail

You have been selected by Beverly J. Sherman to be a Letter of Reference Writer for his/her application to the National Science Foundation program: Postdoctoral Fellowships in Polar Regions Research.

Last Name: Kieffer
Temporary Proposal Number: 0600090
Password: kie333

Access the FastLane website www.fastlane.nsf.gov. Click on Postdoctoral Fellowships. Under Who Are You?, click on Letter of Reference Writer. Log on using your last name, the temporary proposal number stated above and the password above. The first time you use the password you will be asked to change it.

If you have any concerns or questions or forget your password, contact the FastLane Help Desk-- e-mail fastlane@nsf.gov or phone 1-800-673-6188.
Mon Apr 10 14:44:56 EDT 2006

This e-mail was sent from an address that cannot accept incoming e-mail therefore please DO NOT REPLY TO THIS MESSAGE.

Figure 1 A FastLane-generated email to a Letter of Reference Writer, with necessary login information.

2. **Access FastLane and select NSF Postdoctoral Fellowships and Other Programs (see [Introduction to Postdoctoral Fellowship and Other Programs]). The NSF Postdoctoral Fellowships and Other Programs screen displays (Figure 2).**

Figure 2 NSF Postdoctoral Fellowships and Other Programs screen. The I am a Letter of Reference Writer link is circled.

3. **Select the GO button for I am a Letter of Reference Writer. The Letter of Reference login screen displays (Figure 3).**

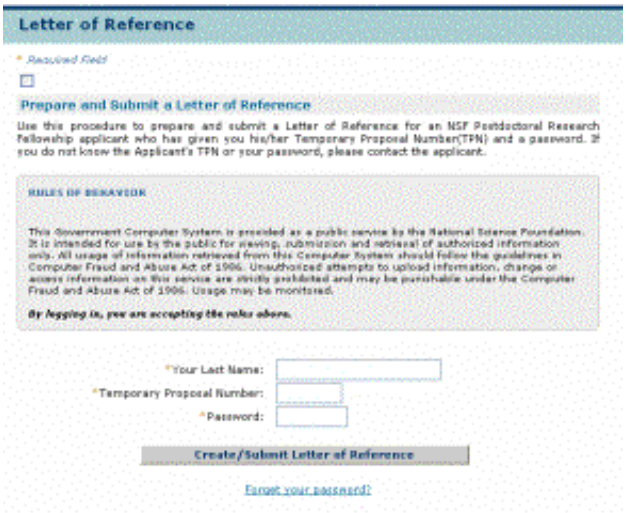


Figure 3 Letter of Reference login screen.

4. **Enter your last name, the temporary proposal number, and password (get this information from the NSF Postdoctoral Research Fellowship applicant or from the FastLane e-mail described in Step 1), and then select Create/Submit Letter of Reference (Figure 3). The first time you use the password, a Change Password screen displays (Figure 4).**

Figure 4 Change Password screen.

5. **Type in your new password (Figure 4). The next message verifies your email address (Figure 5).**

Figure 5 E-mail verification message.

6. **Select the Yes button (Figure 5). The Letter of Reference Instructions screen displays (Figure 6).**

FastLane

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Postdoctoral Fellowships in Polar Regions Research

Applicant:Beverly Sherman

INSTRUCTIONS: To submit a reference to NSF please follow this three step process.

1. Fill out the Rating and save.
2. Upload the Letter and Accept.
3. Submit the Reference (Rating and Letter).

Step 1. GO Rating *Not Saved*

Step 2. GO Letter *Not Uploaded*

Step 3. GO Submit Reference (Rating and Letter) *NOT SUBMITTED YET!*

GO View/Print Reference (Rating and Letter)

Program Announcement Information

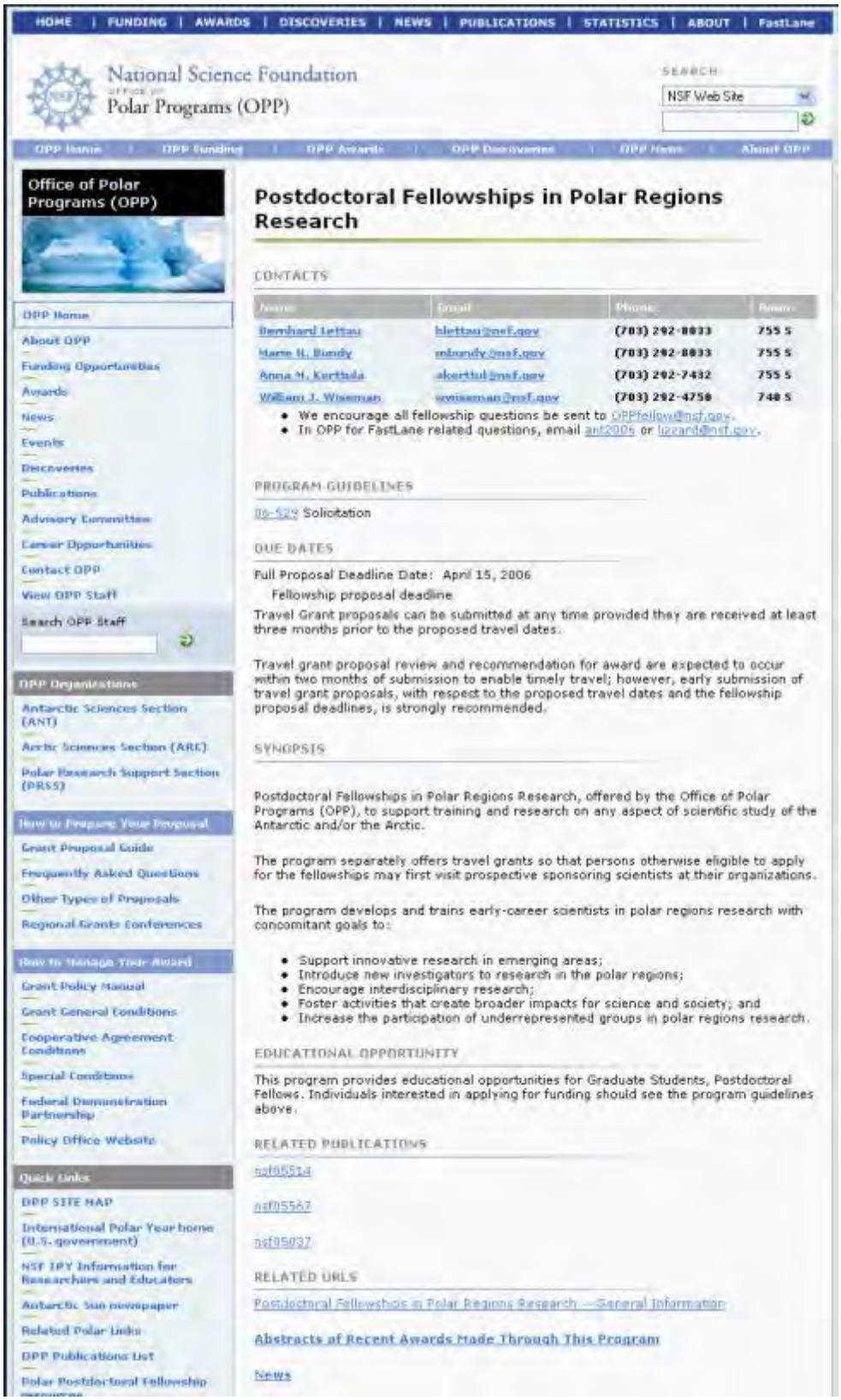
Reference Status for temporary proposal # 6580090
as of Mon Apr 10 16:39:38 EDT 2006

Step	Component	Status	Step Status
1	Rating	NOT SAVED	NOT DONE
2	Letter	NOT UPLOADED	NOT DONE
3	Reference	NOT SUBMITTED TO NSF YET!	NOT DONE

Go Back

Figure 6 Letter of Reference instructions screen. The Step 1 GO button is circled in red.

7. **Select the GO button for Step 1 Rating (Figure 6). You may also wish to view the Program Information (Figure 7).**



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National Science Foundation
Office of Polar Programs (OPP)

SEARCH
NSF Web Site

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Office of Polar Programs (OPP)

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OPP Organizations
Antarctic Sciences Section (ANT)
Arctic Sciences Section (ARC)
Polar Research Support Section (PRSS)

How to Prepare Your Proposal
Grant Proposal Guide
Frequently Asked Questions
Other Types of Proposals
Regional Grants Conferences

How to Manage Your Award
Grant Policy Manual
Grant General Conditions
Cooperative Agreement Conditions
Special Conditions
Federal Demonstration Partnership
Policy Office Website

Quick Links
OPP SITE MAP
International Polar Year home (U.S. government)
NSF IPY Information for Researchers and Educators
Antarctic Sun newspaper
Related Polar Links
OPP Publications List
Polar Postdoctoral Fellowship

Postdoctoral Fellowships in Polar Regions Research

CONTACTS

Name	Email	Phone	Room
Bernhard Lettau	blettau@nsf.gov	(703) 292-8033	755 S
Marie H. Bundy	mbundy@nsf.gov	(703) 292-8033	755 S
Anna M. Kerttula	akerttul@nsf.gov	(703) 292-7432	755 S
William J. Wiseman	wwiseman@nsf.gov	(703) 292-4750	740 S

- We encourage all fellowship questions be sent to OPPfellow@nsf.gov.
- In OPP for FastLane related questions, email ant2006 or lizzard@nsf.gov.

PROGRAM GUIDELINES

06-529 Solicitation

DUE DATES

Full Proposal Deadline Date: April 15, 2006

Fellowship proposal deadline

Travel Grant proposals can be submitted at any time provided they are received at least three months prior to the proposed travel dates.

Travel grant proposal review and recommendation for award are expected to occur within two months of submission to enable timely travel; however, early submission of travel grant proposals, with respect to the proposed travel dates and the fellowship proposal deadlines, is strongly recommended.

SYNOPSIS

Postdoctoral Fellowships in Polar Regions Research, offered by the Office of Polar Programs (OPP), to support training and research on any aspect of scientific study of the Antarctic and/or the Arctic.

The program separately offers travel grants so that persons otherwise eligible to apply for the fellowships may first visit prospective sponsoring scientists at their organizations.

The program develops and trains early-career scientists in polar regions research with concomitant goals to:

- Support innovative research in emerging areas;
- Introduce new investigators to research in the polar regions;
- Encourage interdisciplinary research;
- Foster activities that create broader impacts for science and society; and
- Increase the participation of underrepresented groups in polar regions research.

EDUCATIONAL OPPORTUNITY

This program provides educational opportunities for Graduate Students, Postdoctoral Fellows. Individuals interested in applying for funding should see the program guidelines above.

RELATED PUBLICATIONS

nsf05514

nsf05567

nsf05037

RELATED URLS

Postdoctoral Fellowships in Polar Regions Research --General Information

Abstracts of Recent Awards Made Through This Program

News

Figure 7 Program information.

8. If you selected the Go button for Step 1, the Letter of Reference Rating Sheet screen displays (Figure 8).

FastLane

Postdoctoral Fellowships in Polar Regions Research

Step 1: Rating

for Beverly Sherman

Title of Research Plan

READ the Program Announcement for general information on Letter of Reference. Refer to instructions for completing the Letter of Reference form.

Applicant'S Name: Sherman, Beverly J.

Referee's Information

Last Name: Kattla

First Name: Jody

Middle Initial:

Title:

Referee's Institution

Institution Name: University of MO

Department: Journalism

Phone: 7037498555

FAX:

e-Mail: jkattla@nsf.gov

How long have you known the Applicant? Years Months

In what capacity(ies)?
(e.g. undergraduate, graduate, research assistant, by reputation only, etc.)

On the following scale of 1 to 5, please rank the applicant with those of comparable experience:

- 1 - The most outstanding person at this career stage I have known in the past 5 years
- 2 - Among the top 10 young scientists or engineers I have known in the past 5 years
- 3 - Outstanding
- 4 - Above Average
- 5 - Average or below

Please select one of the two statements below:

- A. My identity and this report must be held in confidence
- B. This report may be released to the applicant upon request

Note: If item A was selected, the Foundation will honor your request to the extent permitted by law

Reference Status for temporary proposal # 6580090
as of Mon Apr 10 16:40:04 EDT 2006

Step	Component	Status	Step Status
1	Rating	NOT SAVED	NOT DONE
2	Letter	NOT UPLOADED	NOT DONE
3	Reference	NOT SUBMITTED TO NSF YET!	NOT DONE

Save | Delete | Go Back

National Science Foundation
4201 Wilson Boulevard
Arlington, Virginia 22230, USA

Tel: 703-292-5111
FIRS: 800-877-8339
TDD: 703-292-5090

Figure 8 Letter of Reference Rating Sheet screen.

9. **Make sure your name and title information are correct (Figure 9).**

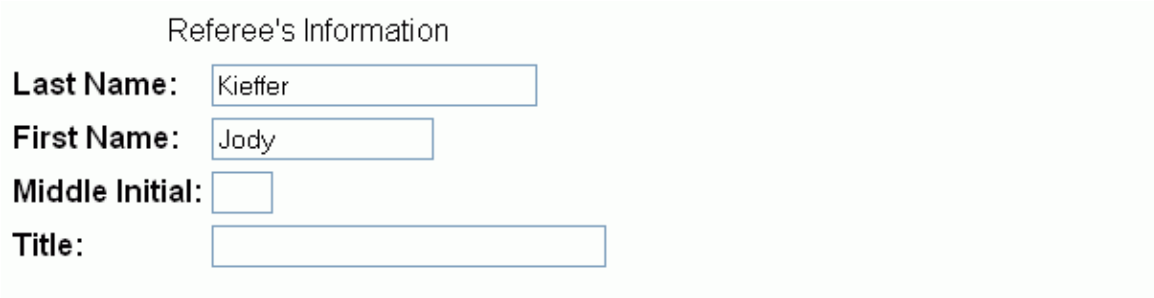

Figure 9 Referee's name and title information.

10. **Make sure your institution name, department, and contact information are correct (Figure 10).**

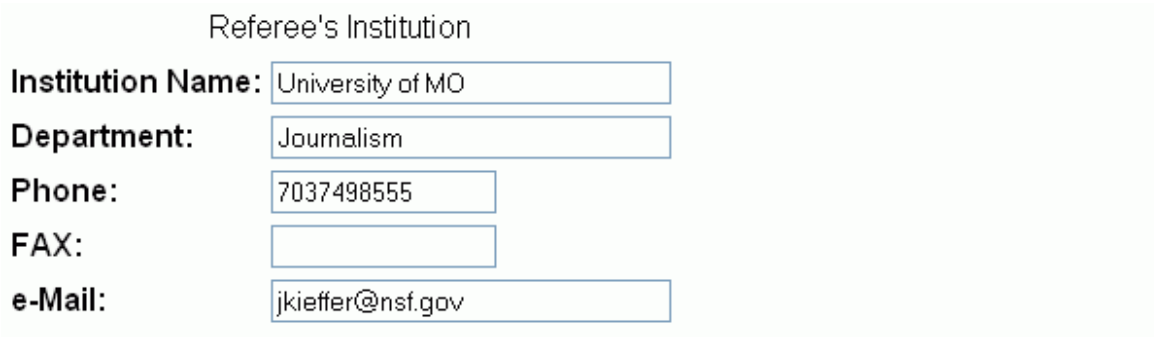

Figure 10 Referee's institution name and contact information.

11. **Indicate how long you have known the applicant in years and months (Figure 11).**

Figure 11 How long have you known the Applicant.

12. **Indicate in what capacity you have known the applicant (as an undergraduate, research assistant, by reputation only, etc.) (Figure 12).**

In what capacity(ies)?
(e.g. undergraduate, graduate, research assistant, by reputation only, etc.)

Figure 12 In what capacity have you known the Applicant.

13. **Select a rating for the applicant based on what you know of the applicant's work (Figure 13).**

On the following scale of 1 to 5, please rank the applicant with those of comparable experience:

- (●) 1 - The most outstanding person at this career stage I have known in the past 5 years.
- ( ) 2 - Among the top 10 young scientists or engineers I have known in the past 5 years.
- ( ) 3 - Outstanding
- ( ) 4 - Above Average
- ( ) 5 - Average or below

Figure 13 Rating for the Applicant.

14. **Indicate whether or not you want your identity held in confidence (Figure 14).**

Please select one of the two statements below:

- (●) A. My identity and this report must be held in confidence.
- ( ) B. This report may be released to the applicant upon request.

Note: If item A was selected, the Foundation will honor your request to the extent permitted by law.

Figure 14 Indicate level of confidentiality you desire.

15. **To complete the rating, select the Save button (Figure 15). The Step 1 Rating Saved screen displays (Figure 16) with the notation that the Rating has been saved.**

Reference Status for temporary proposal # 6580090
as of Mon Apr 10 16:40:04 EDT 2006

Step	Component	Status	Step Status
1	Rating	NOT SAVED	NOT DONE
2	Letter	NOT UPLOADED	NOT DONE
3	Reference	NOT SUBMITTED TO NSF YET!	NOT DONE

Save | Delete | Go Back

Figure 15 Select the Save button (circled in red) to complete the Rating.

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Postdoctoral Fellowships in Polar Regions Research

Applicant: Beverly Sherman

Title of Research Plan:

Step 1: Rating saved.

Press OK to continue to Step 2

OK

Reference Status for temporary proposal # 6580090
as of Mon Apr 10 16:43:18 EDT 2006

Step	Component	Status	Step Status
1	Rating	Saved	Completed
2	Letter	NOT UPLOADED	NOT DONE
3	Reference	NOT SUBMITTED TO NSF YET!	NOT DONE

National Science Foundation
4201 Wilson Boulevard
Arlington, Virginia 22230, USA

Tel: 703-292-5111
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Figure 16 Step 1 Rating Saved screen with the Rating listed as saved.

16. Select the **OK** button to go on to the next step (Figure 16). The **Step 2 Letter** screen displays (Figure 17).

Figure 17 Step 2 Letter screen.

17. **Prepare your letter in your word-processing program and upload it (see Upload a File for instructions) (Figure 17). After you have uploaded the file, the Step 2 Letter Uploaded screen displays (Figure 18).**

Figure 18 Step 2 Letter Uploaded screen with the Letter of Reference listed as saved.

18. **If you are certain that your rating sheet and letter are what you want to send, select OK (Figure 18) to submit your letter of reference—no further corrections can be made. A screen displays (Figure 19) with confirmation that the reference has been submitted successfully.**

Figure 19 Step 3 Reference Submitted screen with confirmation that the Reference has been submitted.

19. **Select OK to return to the Letter of Reference screen. The Letter of Reference screen displays (Figure 20) with all of the Letter of Reference components listed as completed.**

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Postdoctoral Fellowships in Polar Regions Research

Applicant:Beverly Sherman

Reference submitted on 04/10/2006

GO View/Print Reference (Rating and Letter)

Program Announcement Information

Reference Status for temporary proposal # 6580090
as of Mon Apr 10 16:50:15 EDT 2006

Step	Component	Status	Step Status
1	Rating	Saved	Completed
2	Letter	Saved	Completed
3	Reference	Reference submitted to NSF	Completed

Go Back

National Science Foundation
4201 Wilson Boulevard
Arlington, Virginia 22230, USA

Tel: 703-292-5111
FIRS: 800-877-8339
TDD: 703-292-5090

Figure 20 Letter of Reference screen with all of the Letter of Reference components listed as completed.

20. **You can select GO to view and/or print the rating and letter.**

21. Select the **Go Back** button to exit the Letter of Reference function.

See also:

- Postdoctoral Fellowship Registration
- View Award-Specific Program Announcement
- How to Apply (for Applicants)

- Postdoctoral Fellowship Contacts

View Past Award Winners

If available, to view the past award recipients of each postdoctoral fellowship, do the following:

1. Access FastLane and select the **NSF Postdoctoral Fellowships and Other Programs** (see Introduction to Postdoctoral Fellowship and Other Programs).

2. Select the **GO** button for Available Programs. The **NSF Postdoctoral Fellowships and Other Programs** screen (Figure 1) displays with a list of available fellowships.

Figure 1 List of NSF Postdoctoral Fellowships and Other Programs currently available.

3. Select the **GO** button for the program you are interested in viewing past winners of.

4. Select the **GO** button for Past Awards. The past award winners page displays (Figure 2).

Fiscal Year 2001 Awards

NSF Astronomy and Astrophysics Postdoctoral Fellowships (AAPF)

Fellow	Institution	Title of Research Project
Kimberly Cobb	University of Chicago	"An Integrated Program of Cosmological Research and Education"
Emily Dyer	NRAO, Socorro	"Northernal Emission in Supernova Remnants"
Brenda Frye	Princeton University	"Measuring Cluster Masses"
Eric Hooper	University of Texas, Austin	"A Census of Accretion Power in the Universe"
Denise Horky-Keller	Case Western Reserve University	"Dwarf Galaxy Satellite Systems Beyond the Local Group"
Kelsey Johnson	University of Wisconsin and NRAO, Socorro	"The Formation and Early Evolution of Massive Star Clusters"
Brian Keating	California Institute of Technology	"Polarimetry of the Cosmic Microwave Background Radiation"
Dara Norman	Cerro Tololo Inter-American Observatory	"A Search for Evidence of Magnification Bias in the Deep Lens Survey"
Don Smith	University of Michigan	"Fast Transient Observations of Optical Flares from Gamma Ray Bursts"
Todd Wass	Harvard University	"Gravitational Lensing, Interferometry, and Education"

Figure 2 The Past Award Winners page displays

See also:

- Postdoctoral Fellowship Registration
- View Award-Specific Program Announcement
- How to Apply (for Applicants)
- Postdoctoral Fellowship Contacts

Postdoctoral Fellowship Contacts

1. Access FastLane and select **NSF Postdoctoral Fellowships and Other Programs** (see Introduction to Postdoctoral Fellowship and Other Programs). The **NSF Postdoctoral Fellowships and Other Programs** screen displays (Figure 1) .

2. Select the **Postdoctoral Research Fellowships Contacts** link (Figure 1) for the current listing of contacts.

Figure 1 NSF Postdoctoral Fellowships and Other Programs screen. The Postdoctoral Research Fellowships Contacts link is circled in red.

See also:

- Postdoctoral Fellowship Registration
- View Award-Specific Program Announcement
- How to Apply (for Applicants)
- View Past Award Winners

Application	Who	Activity
Prepare Review	Proposal Reviewer	Complete and submit the form for review of a proposal.
Download/Save Proposal		Download and save a proposal to your PC for reference.
View Proposal		View a proposal online in PDF format.
Print Proposal at NSF and Mail		Request NSF to print and mail a proposal to you for your review.
Create CD at NSF and Mail		Request NSF to make a CD of a proposal and mail the CD to you for your review.
Edit Reviewer Information		Change your profile information that NSF has on file.

Technical Help

Technical Help Introduction

This FastLane Help section provides FastLane Help usage tips/troubleshooting. You can choose from the following topics:

- Acceptable Formats for FastLane
- Special Instructions for Proposals with Color or High-Resolution Graphics
- Add a Link to FastLane
- Adobe® Reader® for FastLane
- Blocked PDF Producers
- Characters to Use for FastLane
- Configure Adobe Reader for FastLane
- Software Requirements for FastLane
- Upload a File
- Embed Fonts in an MS Word Document
- Web Browser Compatibility
- File Upload Instructions
- Generate PDF Files

Technical Help Introduction

This FastLane Help section provides FastLane Help usage tips/troubleshooting. You can choose from the following topics:

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- Configure Adobe Reader for FastLane
- Software Requirements for FastLane
- Upload a File
- Embed Fonts in an MS Word Document
- Web Browser Compatibility
- File Upload Instructions

- Generate PDF Files

Acceptable Formats for FastLane

FastLane now accepts files in various formats and converts them to PDF for you. The FastLane system uses the file extension (the part of the file name after the period) to determine the file format to properly interpret the information. If your software does not automatically append an extension, make sure to add the appropriate extension when you save the file.

FastLane reliably supports the file formats listed below. If the file format you use is not listed, save the file in either Rich Text Format (.rtf) or Text only (.txt), both of which FastLane supports.

The tables below list:
- Recommended formats

Recommended Formats for FastLane

Extension	File Type
.docx, .doc	Microsoft Word 2007 or older version
.xlsx, .xls	Microsoft Excel 2007 or older version workbook (single worksheet only)
.pptx, .ppt	Microsoft PowerPoint 2007 or older version presentation
.pdf	Fastlane supports and uses Adobe Acrobat Distiller Version 9.0
.eps	Encapsulated PostScript file
.ps	PostScript file
.rtf	Rich Text Format
.txt	Text file

Special Instructions for Proposals with Color or High-Resolution Graphics

Special instructions for proposals that contain high resolution graphics or other graphics where exact color representations are required for proper interpretation by the reviewer

For cost and technical reasons, NSF cannot, at this time, reproduce proposals containing color. Therefore, PIs generally should not rely on colorized objects to make their arguments. PIs who must include in their project descriptions very high- resolution graphics or other graphics where exact color representations are required for proper interpretation by the reviewer, should click on the "High Resolution Graphics/Other Graphics Where Exact Color Represent. Is Required for Proper Interpretation (GPG I.G.1)" check box on the Proposal Cover Sheet. FastLane will display the number of copies of the entire paper proposal for use in the review process that you need to submit. This submission is in addition to, not in lieu of, the electronic submission of the proposal via FastLane. Such proposals must be postmarked (or provide a legible proof of mailing date assigned by the carrier) within 5 working days following the electronic submission of the proposal.

The color copies should be sent to the following address:

Announcement/Solicitation No _____
National Science Foundation PPU
4201 Wilson Boulevard Room P60
Arlington, Virginia 22230

Unless the proposal contains very high-resolution graphics or other graphics where exact color representations are critical to the review of the proposal, proposers should not send in paper copies.

Add a Link to FastLane

You can use either of the images below to link FastLane from your Web page, or you can include a text link on your page.

To copy one of the images below, right-click (Windows) or hold down the mouse button (Macintosh) on the image and select Save Image As... Save the image on your computer. To add a link on your Web page, insert the corresponding HTML code.

Image	Code
go to FastLane	<img src="flimg1.gif" width="82" height="48" border="0" alt="Go to FastLane">
go to FastLane	<img src="flimg2.gif" width="115" height="31" border="0" alt="Go to FastLane">
Go to FastLane (Text link)	Go to FastLane

Adobe Reader for FastLane

To read PDF files in FastLane, you need Acrobat Reader.

The free Acrobat Reader version 7.0 will accurately display FastLane PDF files.

To download the latest supported browser, go to:
http://www.adobe.com/products/acrobat/readstep2.html

Follow the instructions on the download page.

Blocked PDF Producers

These producers may generate accurate standalone documents, but in FastLane these documents have either one of these problems:

- They cannot be easily concatenated with PDF files created by other producers.
- The embedding of fonts in PDF format is problematic and leads to distortion.

FastLane blocks these applications for producing PDF files:

- Canvas/Deneba PDF filter
- PDFWriter
- FrameMaker®
- GhostScript versions prior to 6.5
- Hewlett-Packard Intelligent Scanners
- PhotoShop®
- PStill

Here are the problems these blocked producers generate and FastLane's recommendations for how to fix the problem, if you have no alternative but to use a blocked producer.

Canvas/Deneba PDF Filter

Problem: Concatenation.
FastLane has encountered significant difficulties when attempting to concatenate PDF files produced with the Deneba PDF filter with other PDF files.

Possible Solution: Re-distill the file with Acrobat or Ghostscript.
When PDF files produced with the Deneba PDF filter (usually created by Canvas) are re-distilled with Acrobat or Ghostscript, FastLane can easily concatenate the resulting files. We recommend you use the "I would like FastLane to re-distill my file" button, if available. Otherwise, please re-distill the file using Acrobat or Ghostscript. See Creating FastLane PDF Files.

PDFWriter

Problem: Garbles or gobbles text.
PDFWriter does not produce acceptable PDF files, except under very limited circumstances. The danger is that NSF Program Officers and reviewers will see garbled and/or incomplete versions of the proposal.

Possible Solution: Upload files in a supported format.
Fastlane recommends that you upload your files in one of the supported formats. See Acceptable Formats for FastLane.
If you wish to create and upload a PDF file, use Adobe Distiller (in the same package as PDFWriter) or Ghostscript.
For more information on:

- PDF Writer, go to: http://www.planetpdf.com/planetpdf/pdfs/issue02.pdf
- GhostScript, go to: http://www.cs.wisc.edu/~ghost/.

FrameMaker

Problem: Concatenation.
Even though FrameMaker is an Adobe Product, the "Save as PDF" option produces PDF files that FastLane has difficulty accepting because the option uses the PDFWriter drivers. PDFWriter produces PDF files that are difficult to concatenate.

Possible Solution: Upload the print File.

If you have created a document in FrameMaker, the best option is to choose **File - > Print**, and check the Print to File option. This procedure will not send a document to a printer, but it will save a file to the location that you specify as either a PostScript (.ps) or Printer (.prn) file. Then upload this .ps or .prn file to FastLane.

Or, you can use Acrobat Distiller or Ghostscript to create the PDF files from the PostScript or Printer file. See Generate PDF Files for instructions on how to use Acrobat Distiller/Ghostscript to create PDF files.

GhostScript Versions Prior to 6.5

Problem: Difficulties with font embedding.
FastLane can only accept files produced by GhostScript versions 6.5 and higher, since earlier versions had difficulties with font embedding. As of July 1, 2003, the highest Macintosh version that has been released is 5.5, so Macintosh users currently cannot use GhostScript as a PDF producer for FastLane.

Possible Solution: Download the most recent versions of GhostScript and GSView (a Ghostscript GUI) from Ghostscript at this link: http://www.cs.wisc.edu/~ghost/.

Hewlett-Packard Intelligent Scanners

Problem: Files cannot be uploaded.
The Save as PDF feature on HP Intelligent Scanners produces PDF files that cannot be uploaded into FastLane.

Possible Solution: Save file as JPEG file.
1. Use the **Save as** feature of the scanning software to save the document as a .jpeg file.
2. Import this .jpeg file into one of the supported word-processor formats (Microsoft Word, Microsoft PowerPoint, or WordPerfect). It is important to Import or Insert the picture file into the word-processing document, rather than using the Cut and Paste options.
3. Save the file as a word-processing file.
4. Upload the word-processing file into FastLane for conversion into PDF.

Or, *if saving the document as a .jpeg file does not work, or if you do not have access to the supported word processors*, do the following:
1. Save As or Export As an Encapsulated PostScript (.eps) from your scanning software. But note that EPS files can contain only one page!
2. Upload the .eps file into FastLane, although the image quality might not be as good as a .jpeg image.

PhotoShop

Problem: Concatenation.
Even though PhotoShop is an Adobe Product, the Save as PDF option produces PDF files that FastLane has difficulty accepting, because the option uses the PDFWriter drivers. PDFWriter produces PDF files that are difficult to concatenate.

Possible Solution: Upload as EPS file.

1. If you have created a document in PhotoShop, the best option is choose **File -> Save As**, and select Encapsulated PostScript (.eps) or PhotoShop EPS (.eps) as the file type. Note that EPS files can contain only one page!
2. Upload the .eps file into FastLane, although the image quality might not be as good as that of a .jpeg image.

PStill

Problem: Concatenation.
FastLane has encountered concatenation errors with files produced by the PostScript to PDF converter PStill.

Possible Solution: Upload the PostScript file directly.
We recommend that you upload the PostScript file directly or use Acrobat Distiller or Ghostscript to create the PDF file from the PostScript or Printer file. See Generate PDF Files for instructions how to use Acrobat Distiller/Ghostscript to create PDF files.

Configure Adobe Reader for FastLane

If your browser is using the Reader as a plug-in, Adobe Reader will not work for FastLane.

If you attempt to display or print a PDF document and you encounter a blank page or an error message that says, "An Error Occurred While Trying to Use This Document," it is likely that Adobe Reader is configured as a plug-in. You must delete the plug-in and configure your browser to use Adobe Reader as a helper.

Contact your organization's IT support for instructions on configuring Adobe Acrobat as a helper instead of as a plug-in, or review the appropriate Adobe technical document listed in the table below.

Operating System	Browser	URL
Windows	Internet Explorer or AOL	http://www.adobe.com/support/techdocs/331025.html
Windows	Netscape	http://www.adobe.com/support/techdocs/331038.html
Windows	Netscape Navigator	http://www.adobe.com/support/techdocs/328635.html
Mac OS X	Safari	http://www.adobe.com/support/techdocs/331040.html
Mac OS X	Netscape Navigator	http://www.adobe.com/support/techdocs/328648.html
Unix	Netscape Navigator	http://www.adobe.com/support/techdocs/324610.html

Software Requirements for FastLane

FastLane is a Web-based application. You need:

- A Web browser to access and work in FastLane (see Web Browser Compatibility and Accessibility Software)
- A Portable Document Format (PDF) file reader, generally Adobe Reader 5.0 or higher, for viewing and printing PDF files
- A word processor

FastLane no longer requires that you create your own PDF files. You can upload any document into FastLane that is in a format listed in Acceptable Formats for FastLane.

Only if you want to create your own PDF files to upload into FastLane, you also need: Adobe Acrobat Professional or Standard Version 5 or higher or another application that creates PDF files.

Why PDF?

FastLane converts your documents into PDF format. Why?

Proposals often contain images, graphics, equations, and various character sets (e.g., Greek letters). PDF offers reproducible results and multiplatform support for viewing and printing. This enables reviewers and NSF staff to view an accurate proposal as the author intended with:

- Margins retained
- Original pagination and line breaks
- Equations accurately displayed
- Position and compression of images maintained

Embed Fonts in an MS Word Document

1. Open the Word document.
2. Select **Tools → Options**.
3. In the **Options** box, click the **Save** tab.
4. Click the check mark box for **Embed TrueType fonts**.
5. Click the check mark box for **Embed characters in use only**. (This is the subsetting fonts function.)
6. Click **OK**.

The fonts you used are now embedded and subset in the document for accurate representation on other platforms.

Upload a File

Before you upload a file, embed the fonts in the file.

In these instructions, we take as an example the uploading of a Project Summary for a proposal.

1. Prepare a word-processing document for the file that you want to upload. See Acceptable Formats for FastLane for a listing of all the formats FastLane accepts.

2. On the screen for that form or document (Figure 1), click the **Transfer File** button. (This button may also be called the **Upload File** button or **Upload Document** button.) The **File Upload** screen displays (Figure 2) for that document.

Figure 1 Screen for the Project Summary form in Proposal Preparations. The Transfer File button is circled.

Figure 2 File Upload screen with the title of the form to be uploaded at the top of the screen.

3. Type the name and path of the file in the box next to the **Browse** button (Figure 2).
4. *If you don't know the document path,* click the **Browse** button (Figure 2). The **Choose File** screen opens in a new window (Figure 3).

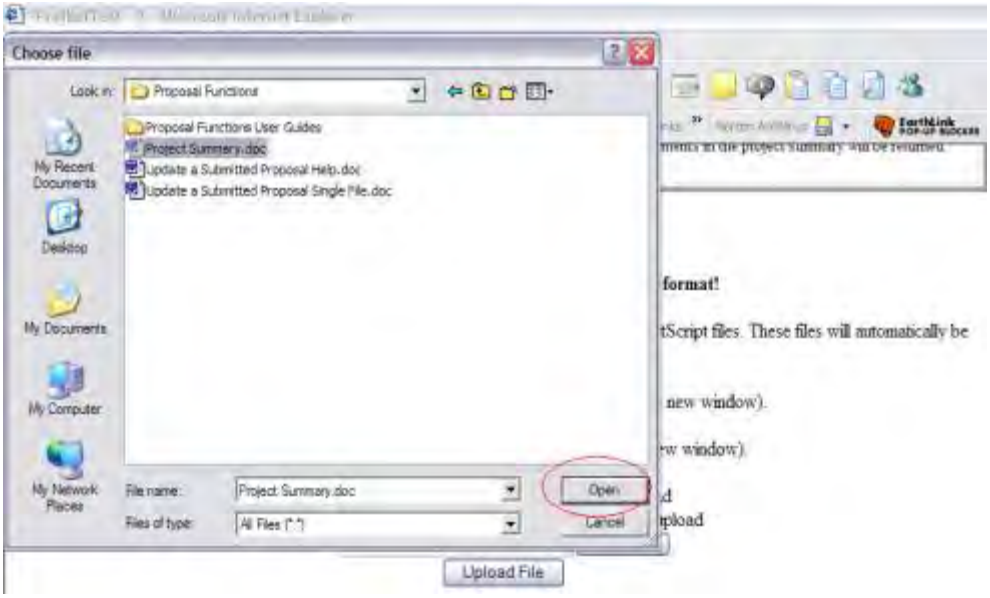


Figure 3 Choose File window. The Open button is circled.

5. In the **Choose File** window (Figure 3), highlight the file you want to upload.
6. Click the **Open** button (Figure 3). The **File Upload** screen displays (Figure 2) with the name and path of the file in the upload box.
7. Click the **Upload File** button (Figure 2). The **PDF Conversion / Compliance Check** screen displays (Figure 4). This screen continues to refresh until the upload is completed. When the upload is complete, the **File Successfully Converted / Checked** screen displays (Figure 5).

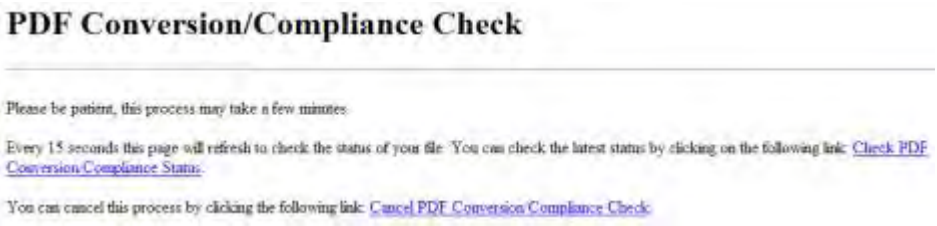


Figure 4 PDF Conversion / Compliance Check screen. This screen continues to refresh until the upload is completed.

Figure 5 File Successfully Converted / Checked screen. The Proofread PDF button is circled.

8. Click the **Proofread PDF** button (Figure 5). A new window opens with your uploaded file in PDF format. If you need to download Adobe Reader to view the PDF file, see Adobe Reader for FastLane.
9. Review the document for accuracy and close the PDF window. The **Proofreading Complete** screen displays (Figure 6) with a message for you to accept or reject the results of the PDF conversion.

Figure 6 Proofreading Complete screen. The Accept button is circled.

If the PDF document is correct, on the **Proofreading Complete** screen (Figure 6), click the **Accept** button. The **File Upload** screen displays (Figure 7) with two new buttons:

- Display Current [Form]
- Delete Current [Form]

Figure 7 File Upload screen after you have successfully uploaded the document, showing buttons to Display and Delete the Current form you just uploaded.

If the PDF document is not correct:

1. On the **Proofreading Complete** screen (Figure 6), click the **Cancel** button. The **Upload Canceled** screen displays in a new window (Figure 8).

Figure 8 Upload Canceled screen.

2. Close the window. The **File Upload** screen displays (Figure 2).

Characters to Use for FastLane

In general, FastLane requires the use of Lower ASCII characters. These are defined as characters in the 00-127 range.

Use only Lower ASCII characters and the Latin1 character set for:

- Typing text into text boxes
- Creating word-processing files for copying and pasting text into text boxes
- Entering data for all FastLane applications
- Creating word-processing files for uploading.

You may use Upper ASCII characters only in PDF files that you upload to FastLane.

Why the Restriction?

FastLane is a multi-platform system. Upper ASCII characters translate to a different character or no character at all on other platforms.

Web Browser Compatibility and Accessibility Software

Some web browsers work better with FastLane than others. This section of FastLane Help outlines preferred web browsers as well as best practices when accessing FastLane.

Microsoft Windows XP or Windows 7 Operating Systems

If you are using a Windows XP or Windows 7, then the following web browsers work **best** when using FastLane:

- **Microsoft Internet Explorer versions**
  For information up updating your Internet Explorer, go to the Microsoft Update Site
- **Mozilla Firefox**
  For information on downloading Firefox, go to the Download Firefox Site

The table below shows best practices when using Internet Explorer, on Windows XP or 7 while accessing FastLane.

Browser Version	Issue	Best Practice
Internet Explorer 5.9–5.5	PDF documents may not display properly in the Internet Explorer web	1. Disable Web browser integration in Acrobat 2. Uncheck the "Display PDF

	browser because of issues in the ActiveX version of the Acrobat Reader plug-in	in Browser" checkbox under Edit--> Preferences--> General
Internet Explorer 7.0	Issues with FastLane Interactive Panel System may occur	Update Internet Explorer with Windows Update.

Mac Operating System

If you are using a Mac operating system, then the following web browsers work **best** when using Fastlane:

- **Mozilla Firefox**
  For information on downloading Firefox, go to the Download Firefox Site
- **Safari 5.0**
  For information on downloading Safari, go to the Download Safari for Mac Site

The table below shows best practices when using other web browsers, on a Mac system, while accessing FastLane.

Browser Version	Issue	Recommendation
Omni Web browser	This web browser is incompatible with FastLane	Download and use the latest version of Firefox, Internet Explorer 8.0 or Safari 5.0.
Internet Explorer for Macs	All versions of Internet Explorer for Macintosh have a problem with websites that employ the Document Object Model in FastLane. This causes errors in use of the browser's **Back** button. Microsoft no longer supports Internet Explorer for Macintosh.	Download and use Safari 5.0, or Firefox 17.0.

FastLane Accessibility Software Support

If you are using accessibility software, then the following combinations work **best** when using FastLane:

- **JAWS 12.0:**
  - With **Windows XP** running **Internet Explorer 8.0**
  - With **Windows XP** running **FireFox 17.0**

- **Dragon 11.5:**
  - With **Windows XP** running **Internet Explorer 8.0**
  - With **Windows 7** running **Internet Explorer 9.0**

Although FastLane may be utilized with other accessibility software, the ones represented above are the only ones we can confirm are supported. Additionally, we can confirm that Dragon 11.5 does not support FireFox 17.0 running on Windows XP or Windows 7.

File Upload Instructions

General

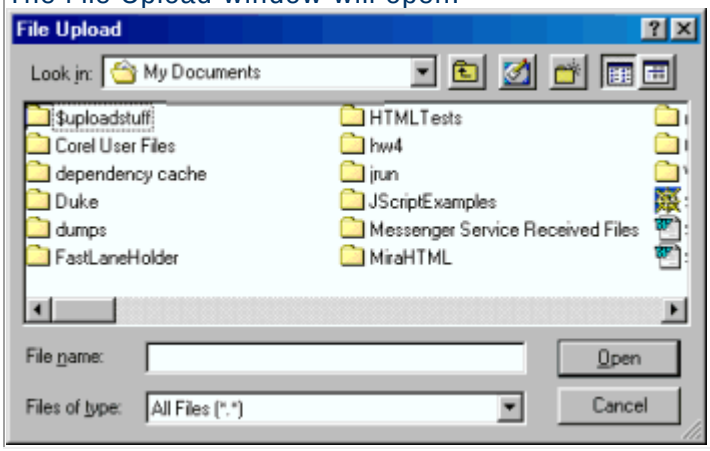
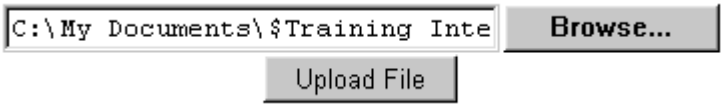
These instructions are valid whether you are uploading a new file or overwriting an existing file.

You will perform three general steps to upload your file(s):

1. Select and upload the file.
2. Proofread the uploaded file.
3. Publish the file or, if errors occurred, resubmit (after making corrections).

Select and Upload the File

To select the file and upload it, follow the steps listed below.

Step	Action	Result
1	On any of the forms that allow file uploads, click on the browse button.	The File Upload window will open. 
2	From the File Upload window, select the file you wish to upload and click on the open button.	The File Upload window will close and the file you selected will be shown in the text box. 
3	Click on the	The file will be uploaded. A new screen will appear

	upload file button. Upload File	when the upload is complete. From this page you will be able to proofread your uploaded document.

Proofread the Document

To proofread the uploaded document, follow the steps listed below.

Step	Action	Result
1	Click on the Proofread PDF button. Proofread PDF	A new browser window will open and display your converted document
2	Proofread the document. When finished, close the new browser window.	A new screen will appear which will give you the option of publishing your document (if all information is correct) or of canceling the operation (if there were errors).

Publish Or Resubmit

To publish or resubmit the uploaded document, follow the steps listed below.

Step	Action	Result
1	If there were **no errors**, click on the Publish button.	Your document will be published and you will be returned to the beginning upload screen.
2	If there **were errors**, click on the Cancel button.	Your document will **NOT** be published and you will be returned to the beginning upload screen.

You can **Display the current file** or you can **Delete the current file** by clicking the appropriate button.

Generate PDF Files

Generate PDF Files Introduction

Print the contents of the Generate PDF Files book.

NSF converts your proposal and other documents that you create in FastLane into Portable Document Format (PDF) files. There are three reasons for this:

- PDF files can be read on different platforms (such as Windows, Macintosh, and Unix).
- The PDF format help ensure that the file appears as the author intends
- NSF can ensure that the PDF file meets FastLane formatting requirements.

Upload Documents Directly to FastLane in Many Formats

FastLane recommends that you upload your documents in their original format. See Acceptable Formats for FastLane for the many formats that FastLane now accepts for uploaded files and Upload a File for instructions on how to upload a document. Embed the fonts used in your document before uploading.

Create and Upload a PDF Document

It is still acceptable to create your own PDF files for uploading, if you wish, as long as the PDF documents meet NSF formatting requirements.

Proposals often contain images, graphics, equations, and various character sets (Greek letters, for example). To enable reviewers and NSF staff to read your file as you intend it to read, your PDF file must be complete. This means that it must contain embedded in it all the non-standard font characters that you used.
To create a PDF file that meets NSF formatting requirements, see the following:

- Software Requirements for Creating PDF Files
- Ensure Your PDF Files Meet NSF Formatting Requirements
- Important Don'ts

See Generate PDF Files to see how to create PDF files from various platforms.

Note: To ensure your PDF files meet NSF formatting requirements, please make sure that all security permission for your PDF files are set to No Security before you upload your PDF file to FastLane. Failure to do so causes problems with the viewing and printing of your proposal. FastLane is blocking PDF files that have security permissions enabled. See Important Don'ts.

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- Software Requirements for Creating PDF Files
- Ensure Your PDF Files Meet NSF Formatting Requirements
- Important Don'ts

See Generate PDF Files to see how to create PDF files from various platforms.

Note: To ensure your PDF files meet NSF formatting requirements, please make sure that all security permission for your PDF files are set to No Security before you upload your PDF file to FastLane. Failure to do so causes problems with the viewing and printing of your proposal. FastLane is blocking PDF files that have security permissions enabled. See Important Don'ts.

Software Requirements for Creating PDF Files

The following software is acceptable for creating PDF files that meet NSF formatting requirements:

- Adobe Acrobat Professional or Standard Version 5 or higher
  Note: FastLane now supports Adobe Acrobat Distiller Version 7
- Ghostscript (Version 6.5 or higher)
- Microsoft Word
- WordPerfect

See Important Don'ts for information on software and settings that will not function.

Important Don'ts

Do Not Use These PDF Producers

These PDF producers may generate fine standalone documents, but create difficulties for embedding fonts and for file concatenation:

- Canvas/Deneba PDF Filter
- Dvipdf(m)
- FrameMaker
- Ghostscript versions before 6.5
- Hewlett-Packard Intelligent Scanners
- PhotoShop
- PStill

For more information, see Blocked PDF Producers.

Do Not Use Adobe Acrobat Encryption or Security Settings

Modern versions of Adobe Acrobat allow users to create security settings on PDF files. These settings negatively affect the ability of NSF Program Officers and reviewers to properly access and view your files.

To turn off Adobe Acrobat security settings, in the PDF document, select **File --> Document Properties**. The **Document Properties** box displays.

In the left sidebar menu, select **Security**.
In the **Security Method** box, select **No Security**.
Click **OK**.

Note: FastLane is a security and encrypted environment. NSF assumes responsibility for keeping your submitted documents secure and confidential.

Do Not Use Adobe Acrobat PDFWriter

PDFWriter does not produce PDF files acceptable for FastLane, except under very limited circumstances. PDFWriter can produce garbled and incomplete versions of your file. It is better to upload the file in one of the many formats that FastLane supports (see Acceptable Formats for FastLane).

If you want to create a PDF file, use Adobe Distiller (in the same package as PDFWriter) or Ghostscript.

For more information on PDFWriter, see http://planetpdf.com/planetpdf/pdfs/issue02.pdf

For more information on Ghostscript, see http://www.cs.wisc.edu/~ghost/

Ensure Your PDF Files Meet NSF Formatting Requirements

Note: *Only* if you have Adobe Version 4, access FastLane Job Options (opens a new window). Then go to **File --> Save as** and save the document that displays as a file in your Adobe folder (usually found in Program Files). This will ensure your PDF document meets NSF requirements. For all other permissible PDF generators, adhere to the instructions below.

To ensure your PDF files meet NSF formatting requirements, you should take these measures:

- Select Edit and Print Adobe security permissions
- Embed all fonts
- Use Type 1 or TrueType fonts
- Subset fonts
- Check resolution for images and figures

1. Select Edit and Print Adobe Security Permissions

See the **File → Document** security option in Adobe Acrobat and set the following two security permissions to **Allow**:

- **Edit** permission
- **Print** permission

The **Edit** permission must be set to **Allow** so NSF can concatenate your documents into one file.

Embed All Fonts

Always embed fonts into the PDF file. Otherwise, PDF viewers and printers may replace your fonts with substitutes and produce unwanted results. For example, a bracket in a mathematical equation might be replaced by a column of letters.

Use Type 1 or TrueType Fonts

The fonts are commonly available in most applications.

Subset Fonts

Subsetting fonts forces the fonts you used to be properly called when individual PDF files are combined into one large PDF proposal file.

Check Resolution for Figures and Images

Conversion programs to PDF have settings that may affect the resolution of your figures and images.

Generate a PDF

Generate a PDF Introduction

To generate a PDF file, use the instructions below for the appropriate software, version, and operating system (OS):

- Adobe Acrobat Professional or Standard Version 5 or higher
  - Windows
  - Mac
- Ghostscript
- WordPerfect

Generate a PDF Introduction

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  - Windows
  - Mac
- Ghostscript
- WordPerfect

Generate a PDF File in Windows

To generate a PDF, you must have installed Adobe Acrobat Standard or Professional Version 5 or higher.

First, embed the fonts in your word-processing document.

1. Open the word-processing file you want to convert to PDF.
2. Select **File → Print**. The **Print** box displays.

3. In the **Name** box, select Acrobat Distiller (for Version 5) or Adobe PDF (for Version 6 or higher).
4. Click **OK**. The document displays in a new window as a PDF file.
5. Select **File → Save as PDF**. The **Save as** box displays.
6. Give the file a name and select the directory you want to store it in.
7. Click **Save**. The PDF file is now ready for uploading to FastLane. See Upload a File.

Generate a PDF File for Macintosh

To embed the fonts in your document, FastLane recommends that you first turn a Word or other word-processing document into a PostScript file and then convert the PostScript file to a PDF for uploading to FastLane.

1. Open your word-processing document.
2. Select **File → Print**.
3. In the dialogue box, change **Copies and Pages** to **Output Options**.
4. Click **Save as file**. The **Save As** box displays.
5. In the dropdown menu, select **PostScript**.
6. Click **Save**.
7. Close out the word-processing file.
8. Double-click the PostScript file icon or filename in the folder that you saved it to. A box displays stating the PostScript file is being converted to PDF. When the conversion is finished, the converted document displays as a **Preview**.
9. In the Preview, select **File → Export**.
10. In the **Format** drop-down box, select **PDF**.
11. Click **Save**.

Your original document is now in PDF with fonts embedded.

Generate PDF Files With Ghostscript

Instructions and the current version of Ghostscript may be found at the GhostScript Home Page.

Go to the Ghostscript website for more information on Postscript to PDF.

Suggestions

Remember when using Ghostscript to:

- Use Type 1 fonts.
- Embed the fonts.
- Set the output resolution at a sufficient level for your included images and graphics.
- Since ps2pdf will convert your PostScript file to PDF within Ghostscript, use the following settings:
  - dMaxSubsetPct=100
  - dCompatibilityLevel=1.2
  - dSubsetFonts=true
  - dEmbedAllFonts=true

Generate PDF Files With WordPerfect

NSF highly recommends that the WordPerfect file be uploaded directly to FastLane.

WordPerfect 9 or higher, part of WordPerfect Office 2000, has a Publish to PDF function that will bypass the need for Adobe Acrobat Distiller or GhostScript. This function will embed WordPerfect fonts.

Security and Privacy

NSF FastLane Security and Privacy Introduction

In order to protect the confidentiality of information, the National Science Foundation (NSF) restricts access to most FastLane features to authorized users.

Upon registering with the FastLane system, NSF requires you to establish your identity with unique identifiers: your last name and a password.

NSF will also assign you an **NSF ID**. An NSF ID is a unique numerical identifier assigned to FastLane users by NSF.

Then, to verify the identity of an authorized user accessing the FastLane system, each time you access certain FastLane subsystems you will be required to enter your three authenticating tokens: again, your last name, a password, and your NSF ID.

Unauthorized Access

FastLane is an NSF federal computer system. Unauthorized attempts to gain access to or modify any information stored on this system, to defeat or circumvent security features, or to use this system for reasons other than its intended purposes are illegal and may result in disciplinary action, criminal prosecution, or both.

To protect the integrity of this system and the confidentiality of information stored on it, NSF may monitor any activity on the system and retrieve any information stored on the system.

Personal Information Disclosure

Within FastLane, wherever NSF requests information, you will have access to an explanation of why NSF is requesting the information and how the information will be used.

For more information on NSF's FastLane privacy and security policies, see the following:

- Information Collection, Release, and Dissemination
    a. Release of Grantee Proposal Information
    b. Release of Information by NSF
- Privacy Act and Public Burden Statements
- GRFP Security and Privacy

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    b. Release of Information by NSF
- Privacy Act and Public Burden Statements
- GRFP Security and Privacy

Use of NSF ID and Social Security Numbers

NSF ID

The NSF ID is a unique numerical identifier assigned to FastLane users by NSF. It is a random nine-digit number beginning with three zeroes.

The NSF ID will be used throughout FastLane as a login ID and identification verification.

Social Security Numbers (SSN)

SSN submission will only be requested where it is necessary for business purposes, e.g., financial reimbursement. SSN is solicited under NSF Act of 1950, as Amended.

In areas that do not require SSNs for a business need, FastLane customers will use their NSF ID, assigned to them by NSF in place of SSNs.

The SSN used by the FastLane System is not printed on any reports and is available through online screens only to FastLane users who have an established need to view the SSN.

EDI Proposal Preparation

Click on the links below to go to instructions to submit a proposal via electronic data interchange (EDI):

- Instructions to use EDI
- Instructions to download NSF's program announcements, divisions, and program element codes
- EDI Sample Proposal(4010)
- NSF Proposal Resulting from EDI file(4010)
- NSF Proposal with links to EDI file(4010)
- Data Interchange Standards Association (DISA)
- EDI Translation Software Guide

FAQs

FastLane FAQs Introduction

FastLane Frequently Asked Questions (FAQs) are alphabetized and categorized and cross-referenced into the different areas to make it easier to find an answer to a common question. Some FAQs are listed in more than one area. The areas are as follows:

- Accessing FastLane
- Authorized Organizational Representative Functions
- FastLane-Related Proposal & Award Policies & Procedures Guide (PAPPG) FAQs - Effective January 14, 2013
- Graduate Research Fellowship Program (GRFP) for:
  - Applicant
  - Reference Writers
  - Fellows
  - Fellows Abroad
  - Coordinating Officials
- Interactive Panel System (IPS)
- Notifications and Requests
- NSF ID
- Principal Investigator (PI) Functions
- Project Reports System
- Proposal Preparation
- Sponsored Project Office (SPO) Functions
- Technical
  - General
  - Printing
  - Proposal Preparation

If you do not find the answer to your question in this list or any other FastLane documentation, please contact the FastLane Help Desk for assistance. If you find an error or discrepancy in any of the FAQs, please notify the FastLane Help Desk.

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Accessing FastLane FAQs

1. My password does not work. What should I do?
2. I want to get started in FastLane. How do I get my Principal Investigator (PI) password so I can access the FastLane Proposal Preparation application?
3. How do I get my Principal Investigator (PI) password, so I can access the Project Reports System application to complete my report?
4. How does a Co-PI access the proposal?
5. I have an assistant who will be doing work on a proposal or report. How do I give my assistant access?

1. My password does not work. What should I do?

Your password may not work for any of these reasons:

- Your password has expired.
- You may have mistyped your password.
- You changed your password and inadvertently tried to use the old one.

There are two ways to get a new password:

- Contact your Sponsored Project Office, and they will assign you a new password.
- Reset your password. See Reset Your Password for instructions.

2. I want to get started in FastLane. How do I get my Principal Investigator (PI) password so I can access the FastLane Proposal Preparation application?

If you are a PI at a registered FastLane organization, get your password from your organization's Sponsored Project Office or from those individuals who have the authority to submit proposals to NSF.

To see if your organization is registered and to register it if necessary, see Registration for instructions.

See Passwords for more information on passwords.
See PI Functions Introduction for the activities of the PI.

3. How do I get my Principal Investigator (PI) password, so I can access the Project Reports System application to complete my report?

If you are a PI at a registered FastLane institution, get your password from your institution's Sponsored Project Office (SPO) or equivalent (the people that have the authority to submit proposals to NSF). NSF does not issue passwords to PIs directly.

4. How does a Co-PI access the proposal?

A Co-PI can access a proposal after you have added their name and National Science Foundation Identification Number (NSF ID) to the Cover Sheet Form of a proposal. See Add a Co-PI to a Proposal for instructions.

NSF permits only four Co-PIs per proposal. Co-PIs can be from your organization or another organization.

5. I have an assistant who will be doing work on a proposal or report. How do I give my assistant access?

To provide access to your proposal or reports for administrative support or proposal personnel who are not listed as PI or Co-PI, you must do the following:

1. Assign a proposal PIN if your assistant needs to work on a proposal or assign an award PIN if your assistant needs to work on a project report.
2. Give the PIN to your assistant.
3. Your assistant then logs in to Proposals, Awards, and Status as an Other Authorized User (see Log In as an Other Authorized User for instructions).

To revoke access to an award or a proposal, change the proposal or award PIN.

Authorized Organizational Representative (AOR) FAQs

1. What is an Authorized Organizational Representative (AOR)?
2. What if our organization has multiple individuals that we wish to designate as AORs?
3. With implementation of the electronic signature process, are all pre- and post-award actions able to be done electronically?
4. How and when will the AOR be notified if there is a proposal waiting to be electronically signed?
5. Can an AOR electronically sign a proposal that is in process before submission of the proposal?
6. How long after submission does the AOR have to electronically sign the proposal?
7. In terms of how the process will actually flow, will an email be sent to both the Authorized Organizational Representative and the Sponsored Project Office notifying them of when a proposal is ready to be submitted?
8. If an organization determines that those authorized to submit proposals also are designated AORs, should both the Submit Proposals to NSF and Authorized Organizational Representative Functions be checked as part of their user permissions?

1. What is an Authorized Organizational Representative (AOR)?

An Authorized Organizational Representative (AOR) is the individual who is authorized to sign a proposal or request on behalf of the proposing organization. The organization must inform FastLane which individuals have the authority to electronically sign the proposals and provide the required proposal certifications.

See AOR Functions Introduction.

2. What if our organization has multiple individuals that we wish to designate as AORs?

NSF does not limit the number of designated AORs for an organization. An organization may assign the AOR Functions permission to as many individuals as it deems necessary.

3. With implementation of the electronic signature process, are all pre- and post-award actions able to be done electronically?

Yes.

4. How and when will the AOR be notified if there is a proposal waiting to be electronically signed?

FastLane does not send the AOR an email alert that proposals are waiting to be signed. The AOR checks in the Authorized Organizational Representative Functions application in Research Administration for documents that are awaiting electronic signature (see AOR Functions for instructions).

5. Can an AOR electronically sign a proposal that is in process before submission of the proposal?

No. FastLane will not permit the AOR to electronically sign the proposal before the SPO submits it.

6. How long after submission does the AOR have to electronically sign the proposal?

If your organization has separate certification and submission processes, the AOR has 5 business days from the date of electronic submission to electronically sign the proposal. If the AOR is submitting the proposal via FastLane, the submission and electronic signature processes are concurrent.
See AOR Functions Introduction.

7. In terms of how the process will actually flow, will an email be sent to both the Authorized Organizational Representative and the Sponsored Project Office notifying them of when a proposal is ready to be submitted?

In the Proposal Preparation application, when the PI allows the SPO to View/Edit/Submit, FastLane automatically sends an email to those persons who have the authority to submit proposals for your organization.

8. If an organization determines that those authorized to submit proposals also are designated AORs, should both the Submit Proposals to NSF and Authorized Organizational Representative Functions be checked as part of their user permissions?

Yes. You must check both permissions in the user's profile (see Add a User or Modify a User Profile for instructions). If your organization's certification process is separate from the submission function, you can still give permission to AORs to submit proposals. However, the AOR must also have permission to conduct Authorized Organizational Representative Functions to electronically sign the proposal.

GRFP FAQs

GRFP User Guides

GRFP FAQs

Graduate Research Fellowship Program FAQs Introduction

Print the contents of the GRFP FAQs book.

The FAQs for the Graduate Research Fellowship Program (GRFP) are organized for use by the category of user as follows:

- Applicants
- Reference Writers
- Fellows
- Coordinating Officials

GRFP FAQs for Applicants

1. Who can help me with questions regarding the GRFP application process?
2. I lost my password for the GRFP application. What should I do?
3. I do not know my e-mail address to provide on the Forgot Password screen, or I have not received the temporary password. What should I do?
4. I lost my username for the GRFP application. How can I retrieve it?
5. Where do I direct technical questions regarding FastLane and the GRFP?
6. How can I determine if I am eligible to apply for the GRFP?
7. Applying for GRFP takes a lot of effort, and I don't want to apply if I'm not eligible. Can I find out if I'm eligible before I apply?
8. For GRFP eligibility purposes, do courses I'm currently taking count as complete?
9. I am in the process of becoming a permanent resident alien, but I won't have my green card until after the GRFP application deadline. Am I still eligible?
10. I don't see my field on the list provided in the program solicitation for the GRFP. Am I eligible?
11. What application materials do I need to submit for the GRFP?
12. I applied for the GRFP fellowship last year. Can I re-activate materials from an old application?
13. Where can I find information about the relevant deadlines for the GRFP?
14. Do I need to attend school full-time if awarded a GRFP fellowship?
15. What materials should I review before beginning my GRFP application?
16. I am preparing my application for the GRFP. How can I learn about the types of research projects NSF funds?
17. Can I submit my GRFP application material after the deadlines?
18. Is there any advantage to submitting my GRFP application before the deadline?
19. How is a semester or quarter hour defined for the GRFP application?

20. What academic transcripts are required for the GRFP and where should transcripts be sent?
21. How can I confirm that my electronic application for the GRFP was received?
22. I have applied to several graduate schools but I haven't been accepted to any yet. What should I put down for my proposed graduate institution for the GRFP?
23. The GRFP deadlines have passed, but I have now been published in a scientific journal. Can I add this information to my submitted application?
24. Should references or citations be included in the statements for the GRFP, and if so, do they count as part of the page limit?
25. What are the formatting and page number restrictions for the statements for the GRFP?
26. Should I send a transcript of my grades after I complete my courses this fall for the GRFP?
27. I attended a university overseas for one semester. It is very difficult to obtain a transcript. Do I still have to get a transcript from the international university?
28. Can I determine whether my transcripts successfully uploaded?
29. I am preparing my application for the GRFP, and have chosen an institution for my graduate work. If awarded a fellowship, can I change to another institution and still keep my fellowship?
30. Can you explain the Merit Review Criteria for the GRFP?
31. Who are the panelists that review the GRFP applications?
32. I heard that applications for the GRFP are pre-screened and if your GPA is below a certain average, your application isn't considered. Is this true?
33. Since applicants can't revise an application after it's been submitted, how do I make changes to my Reference Writers in the application for the GRFP?
34. How do I re-rank my Reference Writers if 5 have been added and ranked?
35. I submitted my application for the GRFP via FastLane. Do my Reference Writers have to submit by FastLane also?
36. I just started graduate school and my professors don't really know me well enough to fill out the References for the GRFP. What should I do?
37. How do my Reference Writers for the GRFP know their reference letters have been received by NSF?
38. Can my Reference Writers for the GRFP upload their comments, or do they have to type comments on a form in FastLane?
39. My institution has letters of reference on file in the Placement Office, or my reference has provided me with a general letter of reference. Can I go ahead and use those letters for the GRFP?
40. Can you tell me if you have received my reference Letters for the GRFP?
41. What type of information should Reference Writers include in their GRFP reference letter?
42. What is the deadline for submitting GRFP reference letters?
43. I am receiving an error when uploading my transcript file. How can I upload my transcript without receiving an error?
44. My Reference Writer did not receive the e-mail nominating them to serve as a reference writer or the e-mail containing their temporary password. How can I make sure they can submit a letter?
45. What should I take into consideration when I develop the Proposed Research Title?
46. What is an ORCID Identifier and how does NSF GRFP use this information?

1. Who can help me with questions regarding the GRFP application process?

For questions related to the application process or requirements, contact the Graduate Research Fellowship Operations Center. The Operations Center helpdesk is staffed between the hours of 8:30 am and 5:30 pm ET Monday through Friday. Contact the Center in any of these ways:

- E-mail: info@nsfgrfp.org
- Toll Free Phone: (1-866-673-4737)
- International Phone: 202-331-3542

2. I forgot my password for the GRFP application. What should I do?

On the main GRFP login screen, click Forgot My Password to request that a temporary password be sent to you at the primary e-mail address you provided during account setup. You may also reset your password directly on the Forgot My Password screen by using the password secret questions feature. This feature is only available if you used the secret questions option in setting up your account.

3. I do not know my e-mail address to provide on the Forgot Password screen, or I have not received the temporary password. What should I do?

For resetting a password directly, please use the Forgot Password link on the FastLane/GRFP login box. If you have forgotten your e-mail address, contact the GRF Operations Center at 1-866-673-4737 (office hours: Monday-Friday, 8:30 am - 5:30 pm ET) or e-mail: info@nsfgrfp.org.

4. I forgot my username for the GRFP application. How can I retrieve it?

You can click the Forgot Username link and retrieve your username after you have completed the screen form. Or contact the FastLane Help Central at 1-800-673-6188 (office hours: Monday-Friday, 7 am - 9 pm ET) and select the option for FastLane registration, password and login support (Option 1). Do not select the option for the Graduate Research Fellowship Program or e-mail: fastlane@nsf.gov.

5. Where do I direct technical questions regarding FastLane and the GRFP?

Contact the contact the GRF Operations Center at 1-866-673-4737 (office hours: Monday-Friday, 8:30 am - 5:30 pm ET) or e-mail: info@nsfgrfp.org.

6. How can I determine if I am eligible to apply for the GRFP?

Eligibility requirements are described in the Program Solicitation Section IV.

7. Applying for GRFP takes a lot of effort, and I don't want to apply if I'm not eligible. Can I find out if I'm eligible before I apply?

Applicants must self-certify that they have read and meet the eligibility requirements contained in the Program Solicitation. The text in the Program Solicitation is the only official eligibility guidance you can receive. Read the Program Solicitation closely to be sure you are interpreting the eligibility requirements properly. Seek additional advice from your mentors, professors, or academic advisors. When deciding to apply, consider your relative qualifications, eligibility concerns, and estimated time investment balanced against the benefits the GRFP provides. If you have questions about the eligibility guidelines in the Program Solicitation, you may contact the GRF Operations Center at info@nsfgrfp.org or 1-866-673-4737.

8. For GRFP eligibility purposes, do courses I'm currently taking count as complete?

No. GRFP eligibility is based on study completed as of August 1.

9. I am in the process of becoming a permanent resident alien, but I won't have my green card until after the GRFP application deadline. Am I still eligible?

Permanent resident status must be established by the application deadline.

10. I don't see my field on the list provided in the program solicitation for the GRFP. Am I eligible?

Additional information about supported fields of study can be found in Section IV of the Program Solicitation. If your field is not listed, please read Section IV of the Program Solicitation carefully, particularly the material concerning eligible fields of study.

11. What application materials do I need to submit for the GRFP?

Complete applications include (1) information that must be submitted electronically using NSF's FastLane Graduate Research Fellowship Program application module, including uploaded transcripts, and (2) three letters of reference submitted electronically by your nominated Reference Writers using NSF's FastLane Reference Letter submission.

12. I applied for the GRFP fellowship last year. Can I just send in copies of last year's information? Can I re-activate materials from an old application?

No. NSF cannot reactivate or reuse materials submitted in prior years. However, you can use the same user name and password from your old application to log into FastLane to begin a new application. All application information must be re-entered, except for your personal profile information, which can and should be updated.

13. Where can I find information about the relevant deadlines for the GRFP?

Complete information regarding GRFP deadlines, requirements, and submission methods can be found at the Graduate Research Fellowship Program module and the Program Solicitation.

14. Do I need to attend school full-time if awarded a GRFP fellowship?

Yes, the Fellowship is intended only for students enrolled in full-time programs leading to graduate degrees in science and engineering.

15. What materials should I review before beginning my GRFP application?

Read and understand the Program Solicitation to get an understanding of the program benefits, eligibility, requirements, and how your application will be evaluated. Review the Applicant User Guide to identify the information you need to provide and specific instructions for filling out the online application. Review the GRFP FAQs, which clarify the Program Solicitation and the Applicant User Guide. These links can be found at FastLane's GRFP module.

16. I am preparing my application for the GRFP. How can I learn about the types of research projects NSF funds?

You can visit NSF's website (www.nsf.gov) for information and guidance about current and emerging themes within the NSF directorates (departments). You can review the NSF Guide to Programs at www.nsf.gov/funding/ as well as the NSF's database of funded projects (awards) at www.nsf.gov/awardsearch/ for specific funding information. You should also discuss your proposed research with your mentors, professors, or researchers, who have applied for NSF grants in your field.

17. Can I submit my GRFP application material after the deadlines?

GRFP does not accept late application materials. Applicants must adhere to the deadline dates for the Primary Field of Study and the deadline time for receipt (8 p.m. Eastern Time) for submitting both the FastLane Application Information electronically and the Supporting Application Materials. These deadlines are posted at https://www.fastlane.nsf.gov/grfp/. All application materials must be received by NSF by the Field of Study deadline date and time. Applications received after the Field of Study deadline and time will be returned without review.

18. Is there any advantage to submitting my GRFP application before the deadline?

You are encouraged to submit your application in advance of the deadline to avoid delays in electronic receipt that may be caused by traffic volume. We suggest that you complete the Personal, Relevant Background and Future Goals Statement and the Graduate Research Plan Statement as early as possible to allow ample time for editing. This will eliminate delays at the time of submission. Also, do not wait until submission to check for error and warning messages. Periodically click the **Check Application Completeness** button and resolve errors well before the deadline date to avoid delays at the time of submission.

19. How is a semester or quarter hour defined for the GRFP application?

Most U.S. institutions of higher education are on either a semester system or a quarter hour system and count their course credits accordingly. For the purposes of the GFRP application, use whatever system is applicable to you. Official transcripts normally include, next to the course grade, the credits per course with cumulative totals at the end. The transcript key should include a statement of the credit system the school uses; the registrar's office for that institution can also provide this information.

20. What official academic transcripts are required for the GRFP and where should the transcripts be sent?

You must list all undergraduate and graduate institutions you attended in the Education and Work Experience section of the application (exceptions are listed below). Official or unofficial academic transcripts are required for all institutions listed. If your undergraduate transcripts include all transfer credits, such as community college or summer courses, you do not need to list each undergraduate institution attended, only the degree-granting institution. If the same transcript applies to more than one entry on the Education and Work Experience section, you only need to upload the transcript once, and should use the available checkbox to indicate that the transcript for that school is included on another transcript that you have uploaded. Only electronic transcripts are accepted, and they must be submitted as part of the online application. Please read the Application Preparation Instructions in the Program Solicitation for more information on the transcripts requirements.

21. How can I confirm that my electronic application for the GRFP was received?

FastLane will display the status of application information that is received. Applicants can view the status by accessing FastLane. The status of the application is displayed on the screen after you log into the system; after you submit your application, a screen displays stating that your application is now received. **If the submission of the FastLane application package was successful and if you provided a valid e-mail address as part of the application, you will also receive a confirmation e-mail message that same day. If the submission was not successful, you will not receive a confirmation e-mail message.** Throughout the process you can view and print your application using the View/Print Application option.

22. I have applied to several graduate schools, but I haven't been accepted to any yet. What should I put down for my proposed graduate institution for the GRFP?

You do not have to be accepted to an institution before listing it as the Proposed Graduate Institution on your application. Simply select the institution you wish to attend if you were granted a fellowship. This information is not provided to the reviewers.

23. The GRFP deadlines have passed, but I have now been published in a scientific journal. Can I add this information to my submitted application?

Review of the application and reference letters is based solely on materials received by the application and reference letter deadlines. NSF does not permit revisions or additions to the application after the submission deadline.

Once an application has been submitted, the only updates to the application content that can be made are to your contact information.

24. Should references or citations be included in the statements for the GRFP, and if so, do they count as part of the page limit?

Yes on both counts. References and/or citations should be included in your statements and do count towards the page limit.

25. What are the formatting and page number restrictions for the statements for the GRFP?

- All statements should be written **using standard 8.5" x 11" page size, 12-point, Times New Roman or 12-point , Computer Modern font, 1" margins on all sides, and must be single spaced or greater. Only publications and presentation citations may be a smaller font, no less than 10-point Times New Roman or 10-point, Computer Modern.** Small type size makes it difficult for reviewers to read the application; consequently, the use of small type not in compliance with the application guidelines may be grounds for NSF to return the application without review.
- There is a 3-page limit for the Personal, Relevant Background and Future Goals Statement, and a 2-page limit for the Graduate Research Plan Statement. References and citations are included toward the page limits.
- Character spacing should use normal (100%) single-line space option. Do not condense line spacing or reduce the character spacing scale. Adherence to type size,

character spacing, and page length is required. Applications that do not adhere to these guidelines will be returned without review.
- Images may be included in your statements. All images, footnotes, endnotes, and other citations are included in the page limit.

26. Should I send a transcript of my grades after I complete my courses this fall for the GRFP?

No. As part of the application process, you should submit official or unofficial transcripts of your academic records, graduate and undergraduate, completed as of the date of application.

27. I attended a university overseas for one semester. It is very difficult to obtain a transcript. Do I still have to get a transcript from the international university?

Applicants are required to submit Official or Unofficial Academic Transcripts electronically as described in the Program Solicitation. However, applicants may not be disqualified if they are unable to submit Academic Transcripts from international institutions, if they can provide other evidence of academic achievement at those institutions in the application. Transcripts must be in English.

28. Can I determine whether my transcripts successfully uploaded?

The Education and Work Experience page will display a “View PDF” option in the entry for each institution for which you have successfully uploaded a transcript. You can click this option to verify that your transcript uploaded correctly. Additionally, you may select the Check Application Completeness button to display the errors and warnings for missing information in the application, including missing transcripts for institutions listed in the Education and Work experience section.

29. I am preparing my application for the GRFP, and have chosen an institution for my graduate work. If awarded a fellowship, can I change to another institution and still keep my fellowship?

Yes, the Fellowship is portable. Fellows must be enrolled in a university, college, or non-profit academic institution of higher education accredited in, and having a campus located in, the United States that offers graduate degrees in eligible science and engineering fields by fall of the award year.

30. Can you explain the Merit Review Criteria for the GRFP?

This refers to the criteria used to evaluate fellowship applications to assess their merit. Complete information regarding the NSF Merit Review Criteria, how the criteria relate to the GRFP application, and the GRFP review process can be found in the Program Solicitation in the GRFP module of FastLane. Refer to the Proposal & Award Policies & Procedures Guide (PAPPG) , Chapter III for further information.

31. Who are the panelists that review the GRFP applications?

Panelists are experts in the relevant academic disciplines and have experience in graduate education. GRFP matches applications with panelists whose discipline most closely

correlates with the proposed research topic. However, applicants should keep in mind that an academic discipline consists of many areas.

32. I heard that applications for the GRFP are pre-screened and that if your GPA is below a certain average, your application isn't considered. Is this true?

No. Applications are not pre-screened for GPAs.

33. Since applicants cannot revise an application after it has been received, how do I make changes to my list of Reference Writers in the application for the GRFP?

Changes can be made before the Reference Writer Letter deadline to references through the Manage References link listed under the Application Optional Task List.

34. How do I re-prioritize the order of my Reference Writers if 5 have been added?

You can change the priority list of your Reference Writers by selecting the Manage References option under Application Package Optional Task List. On the Manage References page, there will be a button titled Edit Reference Writer Ranking. Once selected, a drop-down menu with a range of ranks, 1-5 will appear. Click on the drop-down menu to select a new rank for the reference letter. Please note that each reference letter must have a unique rank – it is not possible to save your changes if two Reference Writers have the same rank.

35. I submitted my application for the GRFP via FastLane. Do my Reference Writers have to submit by FastLane also?

Yes. NSF accepts only reference letters that are submitted via FastLane for the NSF Graduate Research Fellowship Program. Reference letters must be received by the published reference letter deadline and time. The applicant should monitor the status of reference letter submission before the deadline, to ensure three letters are received by NSF.

36. I just started graduate school, and my professors don't really know me well enough to fill out the references for the GRFP. What should I do?

The applicant should submit references from faculty members who have current knowledge of the applicant's academic work and scholarly development. If that is not possible, as in the case of applicants who have been out of school for some time, letters from other faculty or employers would be appropriate. NSF suggests that at least two of the three Reference Writers are individuals with whom you have worked in your present (or most recent) department, including your thesis adviser if applicable.

37. How do my Reference Writers for the GRFP know their reference letters have been received by NSF?

If receipt of the FastLane reference is successful, the Reference Writer will receive a confirmation e-mail message on the same day. The Reference Writer can also log back into FastLane and view the received reference letter PDF.

38. Can my Reference Writers for the GRFP upload their Letter, or do they have to type comments on a form in FastLane?

Referees will upload their Letter into FastLane using the provided utility. FastLane does not provide a text box for typing a letter.

39. My institution has letters of reference on file in the Placement Office, or my reference has provided me with a general letter of reference. Can I go ahead and use those letters for the GRFP?

The letters need to be uploaded by your Reference Writer into FastLane. General letters of reference are not recommended; they should be tailored to your GRFP application. Panelists look for reference letters that demonstrate potential for success in science and engineering as well as specifically address your intellectual merit and the broader impact of your activities. Applicants should check the status of reference letter submission before the reference writer deadline, to ensure three letters are received by NSF.

40. Can you tell me if you have received my reference letters for the GRFP?

Applicants can check the status of each reference letter by logging into FastLane and clicking the **Manage References** link.

41. What type of information should Reference Writers include in their GRFP reference letter?

We ask that in a reference letter, the Reference Writer addresses the following:

- How long have you known the applicant, and in which capacity? Please note that the more specific (as opposed to generic) a letter you provide, the better reviewers can evaluate the candidate. **If you are the candidate's research supervisor, you must comment on the originality of his/her research statement, and the role, if any, you had in assisting the student with this application.**
- What is the applicant's potential for contributing to a globally-engaged STEM workforce? Please include statements about the applicant's academic potential and, if applicable, prior research experiences, proposed research, and other information that will enable review panels to evaluate the application according to the NSF Merit Review Criteria. Other information may include professional skills and abilities such as analytical, written and oral communication, interpersonal, teamwork, and leadership skills, initiative, integrity, maturity, respect for others and trustworthiness.

- What are the Intellectual Merit and Broader Impacts demonstrated by the applicant? The application will be evaluated on the basis of the two National Science Board approved merit review criteria, Intellectual Merit and Broader Impacts. **Please address both the Intellectual Merit and Broader Impacts of the applicant in your letter.** Please refer to Section IV of the Solicitation <HYPERLINK> for more information about the Review Process and Broader Impacts.

Reviewers evaluating applications submitted to the Graduate Research Fellowship Program may consider the following with respect to the **Intellectual Merit Criterion**: the potential of the applicant to advance knowledge based on totality holistic review of the content in the application, including the two statements, the strength of the academic record and accomplishments, and the reference letters.

Reviewers may consider the following with respect to **Broader Impacts Criterion**: the two statements, personal, professional, and educational experiences, the future plans and prior

accomplishments in the integration of research and education, the potential for future broader impacts, and the reference letters.

42. What is the deadline for submitting GRFP reference letters?

Reference letters must be submitted by the Reference Letter deadline posted on the GRFP Solicitation.

43. I am receiving an error when uploading my transcript file. How can I upload my transcript without receiving an error?

Many universities will place a layer of encryption on official transcript files which can cause issues when uploading to FastLane. If you receive an error, please print a copy of the transcript and scan to PDF prior to uploading.

44. My Reference Writer did not receive the e-mail nominating them to serve as a reference writer or the e-mail containing their temporary password.

Your reference writer may not have received the e-mail nominating them as a Reference Writer for one or more of several reasons. Please check the following if this occurs:

1. **Confirm that you have selected to send the e-mail.** When adding your Reference Writer to your application, you must hit the "Send E-mail" link on the References Screen to send the e-mail notification to the Reference Writer.
2. **Check the Reference Writer's e-mail address.** Check to ensure that the e-mail address you have entered for the Reference Writer is accurate. An exact e-mail address is crucial to matching the reference writer and the applicant in the FastLane GRFP Application Module. If there is a typo or you need to change the e-mail address, you may edit the Reference Writer record (either from your un-submitted Application or from the Manage References link on your GRFP homepage). After editing the Reference Writer e-mail address, the "Send E-mail" link will reappear on the References screen, allowing you to re-send the nomination e-mail.
3. **Check SPAM folders.** Ask your Reference Writer to check their SPAM or Trash folder to ensure that the e-mail did not get sent to one of those folders inadvertently.
4. **Use an alternate e-mail address.** It is possible that the e-mail domain used by your Reference Writer is rejecting the e-mail and not allowing delivery. In this case, request an alternate e-mail from your Reference Writer to be used for this purpose. You can then edit the e-mail address using the directions in step 2 above.

45. What should I take into consideration when I develop the Proposed Research Title?

The title should be brief, informative, scientifically or technically valid, intelligible to a scientifically or technically literate reader, and suitable for use in the public press. It should describe in succinct terms your proposed research, reflecting the contents of your Graduate Research Plan Statement.

46. What is an ORCID Identifier and how does NSF GRFP use this information?

Open Researcher and Contributor ID (ORCID) <hyperlink - http://orcid.org> provides a persistent digital identifier that distinguishes you from every other researcher and, through integration in key research workflows such as manuscript and grant submission, supports automated linkages between you and your professional activities ensuring that your work is

recognized.
The submission of the ORCID Identifier is optional. ORCID Identifiers will not be shared with reviewers.

GRFP FAQs for Reference Writers

1. What type of information should Reference Writers include in their GRFP reference letter?
2. I have been requested to provide a reference letter for a Graduate Research Fellowship applicant. I have lost the e-mail from FastLane on how to log in as a reference writer. Who can help me retrieve my login information?
3. I lost my password for the GRFP application. How can I get it?
4. I have been requested to provide a reference letter for a Graduate Research Fellowship applicant. I have lost the e-mail from FastLane. I would like another copy of the e-mail. Who should I ask to resend the e-mail?
5. I am unable to log in using the Temporary Password I received via e-mail.
6. I did not receive the e-mail nominating me to serve as a reference writer or the e-mail containing my temporary password.

1. What type of information should Reference Writers include in their GRFP reference letter?

NSF appreciates your input in the selection process for the NSF GRFP Graduate Research Fellowships. Letters of references play a crucial role in the review and selection of fellowship awardees. Complete information regarding the NSF GRFP can be found in the Program Announcement<HYPERLINK>. Reference letters should comply with the format guidelines below.

Reference Letter Format Guidelines:
- Letters should be **2 pages** or less**. The system will not allow you to upload a letter that exceeds 2 pages.**
- Letters should be written using standard 8.5” x 11” page size, 12-point, Times New Roman font or Computer Modern (LaTex) font, and 1” margins on all sides
- Letters should be be single spaced or greater – character spacing should use normal (100%) single-line space option
- Letters should be submitted on professional letterhead
- Letters should be signed, and include the professional title of the reference writer, department, and institution

In your letter, please address the following items:
1. How long have you known the applicant, and in which capacity? Please note that the more specific (as opposed to generic) a letter you provide, the better reviewers can evaluate the candidate. **If you are the candidate’s research supervisor, you must comment on the originality of his/her research statement, and the role, if any, you had in assisting the student with this application.**
2. What is the applicant’s potential for contributing to a globally-engaged STEM workforce? Please include statements about the applicant’s academic potential and, if applicable, prior research experiences, proposed research, and other information that will enable review panels to evaluate the application according to the NSF Merit Review Criteria. Other information may include professional skills and abilities such as analytical, written and oral communication, interpersonal, teamwork, and leadership skills, initiative, integrity, maturity, respect for others and trustworthiness.

3. What are the Intellectual Merit and Broader Impacts demonstrated by the applicant? The application will be evaluated on the basis of the two National Science Board approved merit review criteria, Intellectual Merit and Broader Impacts. **Please address both the Intellectual Merit and Broader Impacts of the applicant in your letter.** Please refer to Section IV of the Solicitation <HYPERLINK> for more information about the Review Process and Broader Impacts.
Reviewers evaluating applications submitted to the Graduate Research Fellowship Program may consider the following with respect to the **Intellectual Merit Criterion**: the potential of the applicant to advance knowledge based on totality holistic review of the content in the application, including the two statements, the strength of the academic record and accomplishments, and the reference letters.

Reviewers may consider the following with respect to **Broader Impacts Criterion**: the two statements, personal, professional, and educational experiences, the future plans and prior accomplishments in the integration of research and education, the potential for future broader impacts, and the reference letters.

2. I have been requested to provide a reference letter for a Graduate Research Fellowship applicant. I have lost the e-mail from FastLane on how to log in as a reference writer. Who can help me retrieve my login information?

On the Reference Writer login screen, click on Create a new Password to setup a new password. If you have trouble using the Create new password screen, contact the GRF Operations Center 1-866-673-4737 (office hours: Monday-Friday, 8:30 am - 5:30 pm ET) or e-mail info@nsfgrfp.org

3. I lost my password for the GRFP application. How can I get it?

On the Reference Writer login screen, click on Create a new Password to setup a new password. If you have any trouble using the Create new password screen, contact the GRF Operations Center at 1-866-673-4737 (office hours: Monday-Friday, 8:30 am - 5:30 pm ET) or e-mail info@nsfgrfp.org.

4. I have been requested to provide a reference letter for a Graduate Research Fellowship applicant. I have lost the e-mail from FastLane. I would like another copy of the e-mail. Who should I ask to resend the e-mail?

Ask the applicant to delete and re-enter you as a Reference Writer. The system will re-enable the 'Send E-mail' option if the applicant deletes an existing entry from the Reference Writers list and re-adds the Reference Writer information.

5. I am unable to log in using the Temporary Password I received via e-mail.

If you have received your temporary password and are unable to login to the FastLane GRFP Reference Writer module, check the following:

1. **Check your e-mail address.** Check to confirm you are using the same e-mail address provided by the Applicant when attempting to login. The e-mail address provided by the Applicant can be found in the body of the e-mail you received with your temporary password. An exact e-mail address is crucial to matching the reference writer and the applicant in the FastLane GRFP Application Module.
2. **Check the temporary password.** Record the temporary password and type it into FastLane manually rather than copying and pasting.

3. **Ensure you are using the most recent Temporary Password received.** Occasionally, a user will inadvertently create a password multiple times. If this occurs, use the temporary password in the most recent e-mail you received.

6. I did not receive the e-mail nominating me to serve as a reference writer or the e-mail containing my temporary password.

Please check the following if this occurs:

1. **Confirm your e-mail address with the applicant.** Check to ensure that the e-mail address the applicant entered for you is accurate. If there is a typo or if the applicant needs to change the e-mail address, the applicant can edit the Reference Writer record and resend the nomination e-mail. An exact e-mail address is crucial to matching the reference writer and the applicant in the FastLane GRFP Application Module.
2. **Check SPAM folders.** Check your SPAM or Trash folder to ensure that the e-mail did not end up in one of those folders inadvertently.
3. **Use an alternate e-mail address.** It is possible that your e-mail domain is rejecting the e-mail and not allowing delivery. In this case, provide an alternate e-mail address to the applicant and the applicant will be able to edit your Reference Writer record and re-send the nomination e-mail.
4. **The applicant may no longer need your letter.** Please check with the applicant.

GRFP FAQs for Fellows

1. I have been awarded a Fellowship under the NSF GRFP. How is my Fellowship going to be administered by NSF? What do I need to do to get started?
2. I have been awarded a Fellowship under the NSF GRFP. Who can help me with various questions related to the Fellowship?
3. I have been awarded a Fellowship under the NSF GRFP. How do I log into NSF GRFP?
4. I have a Fellowship under the NSF GRFP. My email address has changed. How can I update my email address in the system?
5. I have a Fellowship under the NSF GRFP. I forgot my login ID. How can I look it up?
6. I have a Fellowship under the NSF GRFP. I forgot my password. What should I do?

1. I have been awarded a Fellowship under the NSF GRFP. How is my Fellowship going to be administered by NSF? What do I need to do to get started?

NSF uses the FastLane Graduate Research Fellowship Program System to administer the fellowships. As a fellow, you will manage your fellowship activities through the same online system with the same login account that you use for completing your application to the Graduate Research Fellowship Program. A number of documentations, including a User Guide, are located on the left side of the screen when you log in. The guide provides step-by-step instructions on how to update your Fellowship Status and request changes. Please read the manual carefully before using the system.

2. I have been awarded a Fellowship under the NSF GRFP. Who can help me with various questions related to the Fellowship?

Please send fellowship-related questions to the Coordinating Official (CO) at your affiliated institution. The CO Directory is located on the left side of the screen when you log into

FastLane's Graduate Research Fellowship Program (GRFP) link. Section 3 of the Information for Graduate Research Fellows Guidelines, located on the left side of the screen after you log into Fastlane/GRFP, provides more detailed information. The CO is the first person you should contact with Graduate Fellowship-related questions. If your CO is unable to help, you can contact the NSF GRFP office directly.

3. I have been awarded a Fellowship under the NSF GRFP. How do I log into NSF GRFP?

NSF GRFP is the Graduate Research Fellowship Program link on the FastLane homepage. Log in using the same login account that you had used to submit your fellowship application.

4. I have a Fellowship under the NSF GRFP. My email address has changed. How can I update my email address in the system?

Log into the Graduate Research Fellowship application, and click the "Update My Profile" link to update your primary and secondary email addresses. If you have difficulty logging in and need to update your primary email address, please use the Forgot Password to reset your password directly. If you still have difficulty, please contact the FastLane Helpdesk at 1-800-673-6188 or email fastlane@nsf.gov.

5. I have a Fellowship under the NSF GRFP. I forgot my login ID. How can I look it up?

You can use the Forgot Username link to retrieve your username. You may also contact your school's coordinating official to look up your username. Or contact the FastLane HelpDesk at 1-800-673-6188 or email fastlane@nsf.gov.

6. I have a Fellowship under the NSF GRFP. I forgot my password. What should I do?

In the Login box for GRFP, click Forgot Password. The system will email you a temporary password. Once you receive the temporary password, return to the login page and enter your user ID and temporary password. You can also reset your password directly on the Forgot Password screen.

GRFP FAQs for Coordinating Officials

1. How can I view Grants Roster report for the upcoming Fellowship Year?
2. When do I need to approve a Tenure Change Request?
3. How do I view my Institutions Financial Summary?

1. How can I view my Grants Roster report for the upcoming Fellowship Year?

Detailed instructions for viewing a Grants Roster report can be found in the Coordinating Official System Guide.

2. When do I need to approve a Tenure Change Request?

Fellowship Status Change Requests needing approval will appear in the Coordinating Official Task List. Detailed instructions for Fellowship Status Change Requests can be found in the Coordinating Official System Guide.

3. How do I view my Institutions Financial Summary?

Detailed instructions for viewing your Institution's Financial Summary can be found in the Coordinating Official System Guide.

Interactive Panel System FAQs

1. What is the difference between the Lead Panelist and the Scribe?
2. How do I enter a Panel Summary?
3. How do I Print a Panel Summary?
4. How do I view/approve a Panel Summary?
5. How do I prepare reviews?
6. How do I view the reviews of the other panelists?
7. How do I rank the proposals?
8. Why is the text format in the Panel Summary window inconsistent?
9. How can I refresh my Panel Summary window without being redirected to the Panel Status page?
10. How can I copy and paste the Panel Summary from a Word document into the IPS Panel Summary window without my quotations marks converting to question marks?

1. What is the difference between the Lead Panelist and the Scribe?

The Scribe is appointed by the Program Officer (PO), as the person who prepares and submits the panel summary. The Lead Panelist is usually the panelist who introduces the proposal to the panel.

2. How do I enter a Panel Summary?

The Scribe enters the panel summary in the Interactive Panel System (IPS) on the **Summary** tab for the proposal.

3. How do I print a Panel Summary?

The Scribe can print panel summaries individually or in bulk from the Interactive Panel System (IPS) on the **Summary** tab for the proposal.

4. How do I view/approve a Panel Summary?

If the Scribe has made the summary either "Available for Comment" or "Available for Final Approval," any panelist can view the summary on the **Summary** tab for the proposal. At the bottom of the **Summary** tab is the "Approval Status" list that shows whose approval is required and whose approval has already been given. If you are required to approve the summary, and the Scribe has made the summary "Available for Final Approval," there will be an **Approve** button on the **Summary** tab.

5. How do I prepare reviews?

From the upper left corner of the **My Work** Screen, choose "Prepare Reviews" from the **Other Functions** box. When you click the **GO** button next to the list, the Panel Review System opens in a new window. Follow the Panel Review System's Preparing a Panel Review instructions.

6. How do I view the reviews of the other panelists?

The program office has multiple choices when setting up a panel for the interactive panel system. They can allow panelists (or just assigned panelists) to view the reviews of other panelists at 1) any time, 2) only after submitting their own review, or 3) not at all. Depending on how the program office has set these rules, you may be able to see the reviews of other panelists on the **Reviews** tab.

7. How do I rank the proposals?

All panelists have read-only access to the panel recommendation screen by choosing 'Recommendation' from the **Other Functions** box. If you have been authorized by the program office to provide recommendations for the panel, you will have access to drop-don lists in the 'Recommendation' and 'Ordering' fields. The available options in the 'Recommendation' drop-down list are set by the Program Officers (PO) and, therefore, can vary. The most common (default) options are: "Fund," "Fund if Possible," and "Do Not Fund." Your program officer will inform you of whether to use the 'Recommendations' and/or 'Ordering' field(s), and will provide guidance on the criteria you can use while making these panel rankings. See Preparing a Recommendation for instructions.

8. Why is the text format in the Panel Summary window inconsistent?

The Scribe's Panel Summary window formatting is different from that of the other Panelists because the Scribe is able to edit their page. If the Scribe selects the "Print" button, the window will be shown as read only, which will display a consistent format for all Panelists.

9. How can I refresh my Panel Summary window without being redirected to the Panel Status page?

Place the pointer over the Panel Summary window, right click, and then select 'Refresh' from the list of options. Selecting 'Refresh' at the top of the page will result in the main page refreshing, taking the user back to the IPS main page.

10. How can I copy and paste the Panel Summary from a Word document into the IPS Panel Summary window without my quotations marks converting to question marks?

Prior to copy and pasting from the Word document, make sure that the 'convert straight quotes to smart quotes' check-box in the 'AutoFormat' and 'AutoFormat As You Type' tabs in the Word options are unchecked. The user can also use the text editor or manually correct the characters.

Notifications and Requests FAQs

1. How do I complete a subaward budget?
2. On the cumulative budget page, the number of Post Doctoral Associates, Other Professionals, Graduate Students, Undergraduate Students, Secretarial or Other is not adding correctly. What is wrong?
3. I get this error message: "At least one of the month counts must be greater than 0 on the support form for This Project." I have entered all zeros for the months. Why am I getting this error message?
4. How will my Sponsored Project Office (SPO) know when I have allowed SPO access to the proposal?
5. Are signed budgets still required when submitting Supplemental Funding Requests?
6. How will subawardee signatures be handled in the e-signature process?

1. How do I complete a subaward budget?

To complete a subaward budget, you must add the new organization and then create a budget for the new organization.

See What Is an Addition of Subaward Request?

2. On the cumulative budget page, the number of Post Doctoral Associates, Other Professionals, Graduate Students, Undergraduate Students, Secretarial or Other is not adding correctly. What is wrong?

The NSF Division of Grants and Agreements wants to know the cumulative number of these positions to be filled—not the total number of individuals filling these positions. Let's say you put John Smith as a Postdoctoral Associate for each of 3 budget years. On the cumulative budget, FastLane will calculate "3" as the number of Postdoctoral Associate personnel, rather than "1."

3. I get this error message: "At least one of the month counts must be greater than 0 on the support form for This Project." I have entered all zeros for the months. Why am I getting this error message?

You must indicate all time that will be given to the project, even time with no salary support. If you entered all zeros for the months, then FastLane assumes that the project requires no time and therefore you should not be applying for support. The *Grant Proposal Guide* says: "The proposed project and all other projects or activities requiring a portion of time of the PI and other senior personnel should be included, even if they receive no salary support from the project(s)."

4. How will my Sponsored Project Office (SPO) know when I have allowed SPO access to the proposal?

When you click on the **Go** button associated with one of the following options (see Allow or Remove SPO Access), FastLane automatically sends an email notification to each SPO in the organization that you selected on the Cover Sheet with permission to submit FastLane proposals:

- Allow SPO to only view proposal but not submit
- Allow SPO to view and edit but not submit proposal
- Allow SPO to view, edit, and submit proposal

5. Are signed budgets still required when submitting Supplemental Funding Requests?

FastLane requires that the Supplemental Funding Request budget be signed electronically. You no longer need to send a signed paper copy of the Supplemental Funding Request budget to NSF.

6. How will subawardee signatures be handled in the e-signature process?

NSF no longer requires that the proposing organization provide a paper copy of the subaward budget signed by the organization's Authorized Organizational Representative.

NSF ID FAQs

1. Why is NSF implementing NSF IDs?
2. What is an NSF ID?
3. I don't know my NSF ID. How do I find out what it is?
4. How do I know if I already have an NSF ID?
5. Is a pseudo-SSN different than an NSF ID?
6. How and where do I use my NSF ID?
7. I already have a lot of account IDs to remember, can I choose my own NSF ID?
8. How do I find my co-PI if I don't know his email address or NSF ID?
9. I don't know the NSF ID for a co-PI I am assigning to a proposal coversheet, and when I enter her email address, I get a message requesting additional information. How can I add the co-PI to my proposal?
10. I only have the SSN for a co-PI I want to add to a proposal coversheet – I don't know her NSF ID or email address. How can I add the co-PI to my proposal?
11. When I completed the New Organization (or New Contact or New Individual) Registration process, I forgot to make note of my NSF ID. How can I find out what it is?
12. When I completed the Postdoctoral New Individual Registration process, I forgot to make note of my NSF ID. How can I find out what it is?
13. Will the NSF ID be available for Sponsored Projects Offices (SPOs) to see?
14. If a PI moves to a new organization or institution, does his NSF ID change?
15. I am an SPO and have to add a new PI to my organization. I am not sure if this PI already has an NSF ID. How do I find out?
16. I am an SPO and I have multiple organizations. How do I find my account?
17. I have several FastLane accounts and am not sure which one to use.
18. I am a PI and have several accounts. How do I find my account?
19. When using the NSF ID Lookup to retrieve my NSF ID, I get an error message. How can I find my NSF ID?

1. Why is NSF implementing NSF IDs?

NSF cares about your security and privacy. To increase overall security at NSF and to comply with Government directives (OMB memos m06-16 and m07-16 and the U.S. Office of Personnel June 18, 2007 memo), NSF is limiting the use and exposure of Social Security Numbers (SSNs). NSF has assigned FastLane customers an NSF ID to replace SSNs as their FastLane Login ID.

2. What is an NSF ID?

An NSF ID is a unique numerical identifier assigned to FastLane customers by NSF in place of a Social Security Number.

3. I don't know my NSF ID. How do I find out what it is?

You can look up your NSF ID in several ways:

Option 1: Click on the "NSF ID lookup" link that is located on the FastLane login area. Enter your information in the required fields exactly as it appears in your account. The system will email you your NSF ID.

Option 2: If you are affiliated with a Sponsored Projects Office (SPO), please contact that office for assistance in retrieving your NSF ID via the Accounts Management module in Research Administration.

Option 3: Email FastLane@nsf.gov or call the FastLane Help Desk at 1-800-673-6188.

4. How do I know if I already have an NSF ID?

If you previously used a “pseudo SSN”, it is now your NSF ID. You can search for your NSF ID in several ways:

Option 1: Click on the “NSF ID lookup” link that is located on the FastLane login area. Enter your information in the required fields exactly as it appears in your account. The system will email you your NSF ID.

Option 2: If you are affiliated with a Sponsored Projects Office (SPO), please contact that office for assistance in retrieving your NSF ID via the Accounts Management module in Research Administration.

Option 3: Email FastLane@nsf.gov or call the FastLane Help Desk at 1-800-673-6188.

5. Is a pseudo-SSN different than an NSF ID?

No. They are simply different names for the same number. Originally this number (a unique, randomly generated numerical identifier assigned to FastLane customers by NSF in place of a Social Security Number) was called a pseudo-SSN. However, as we are phasing out the use of SSNs throughout NSF where there is not a business need, we are changing the name from pseudo-SSN to NSF ID.

6. How and where do I use my NSF ID?

You will use this number as your personal identifier in FastLane. Simply enter your NSF ID into fields that request either your SSN or your NSF ID whenever you are prompted.

7. I already have a lot of account IDs to remember, can I choose my own NSF ID?

Sorry, no. The NSF ID is automatically generated for each customer. You are highly encouraged to record the number assigned to you and keep it in a safe place. If you need to look up your NSF ID, you can choose one of the options below:

Option 1: Click on the “NSF ID lookup” link that is located on the FastLane login area. Enter your information in the required fields exactly as it appears in your account. The system will email you your NSF ID.

Option 2: If you are affiliated with a Sponsored Projects Office (SPO), please contact that office for assistance in retrieving your NSF ID via the Accounts Management module in Research Administration.

Option 3: Email FastLane@nsf.gov or call the FastLane Help Desk at 1-800-673-6188.

8. How do I find my co-PI if I don’t know his email address or NSF ID?

Please contact your co-PI or your Sponsored Projects Office (SPO) to retrieve the co-PI’s email address or for additional information.

9. I don’t know the NSF ID for a co-PI I am assigning to a proposal coversheet, and when I enter her email address, I get a message requesting additional information. How can I add the co-PI to my proposal?

The email address you provided may be used by more than one PI. In the boxes provided on the Request for Additional Information screen, follow the options to enter the co-PI's last name or phone number to search for the correct individual.

10. I only have the SSN for a co-PI I want to add to a proposal coversheet – I don't know her NSF ID or email address. How can I add the co-PI to my proposal?

If you do not know the co-PI's NSF ID please contact your co-PI directly, or your Sponsored Projects Office (SPO) to retrieve the co-PIs email address, or, if she is not currently a FastLane customer, to register her as a PI in the system.

11. When I completed the New Organization (or New Contact or New Individual) Registration process, I forgot to make note of my NSF ID. How can I find out what it is?

If you need to look up your NSF ID, you can choose from one of the options below:

Option 1: Click on the "NSF ID lookup" link that is located on the FastLane login area. Enter your information in the required fields exactly as it appears in your account. The system will email you your NSF ID.

Option 2: If you are affiliated with a Sponsored Projects Office (SPO), please contact that office for assistance in retrieving your NSF ID via the Accounts Management module in Research Administration.

Option 3: Email FastLane@nsf.gov or call the FastLane Help Desk at 1-800-673-6188.

12. When I completed the Postdoctoral New Individual Registration process, I forgot to make note of my NSF ID. How can I find out what it is?

You can look up your NSF ID in several ways:

Option 1: Click on the "NSF ID lookup" link that is located on the FastLane login area. Enter your information in the required fields exactly as it appears in your account. The system will email you your NSF ID.

Option 2: Email FastLane@nsf.gov or call the FastLane Help Desk at 1-800-673-6188.

13. Will the NSF ID be available for Sponsored Projects Offices (SPOs) to see?

Yes, the NSF ID is currently viewable to SPOs in the Accounts Management module in Research Administration for all customers affiliated with their organization. This functionality will continue to be available moving forward.

14. If a PI moves to a new organization or institution, does his NSF ID change?

No. The NSF ID is a unique identifier. A PI can be associated with a new organization using an existing NSF ID.

15. I am an SPO and have to add a new PI to my organization. I am not sure if this PI already has an NSF ID. How do I find out?

Ask your new PI whether she is already a FastLane user, and if so, for her NSF ID. If she has forgotten her NSF ID, she can retrieve it using the "NSF ID Lookup."

If the new PI is not already a FastLane user, an NSF ID will be generated during the "Add New User" process in Accounts Management.

16. I am an SPO and I have multiple organizations. How do I find my account?

When you use the NSF ID lookup tool, make sure to include the organization that corresponds to the account you want to review in the field provided.

17. I have several FastLane accounts and am not sure which one to use.

If the accounts are for different organizations please make sure to include the organization that corresponds to the account you want to review in the provided field. If you are not sure whether the accounts are for different organizations, please contact your SPO.

18. I am a PI and have several accounts. How do I find my account?

If the accounts are for different organizations, when you use the NSF ID lookup tool, make sure to include the organization corresponding to the account you want to review in the provided field. If you have more than one account for a single organization, please contact your SPO or the FastLane Help Desk at FastLane@nsf.gov or 1-800-673-6188.

19. When using the NSF ID Lookup to retrieve my NSF ID, I get an error message. How can I find my NSF ID?

These errors can be caused by several factors:

- You entered a different name and/or email address than what is in your record. Refine your search to include the specific name and/or email address associated with your account, or confirm your account details with your SPO before trying your search again.

- You have multiple accounts and did not specify which organization you are looking for. Try the search field again, making sure to fill in the organization information in the field provided.

- You do not have a FastLane account. Contact your SPO to become a registered user, or complete the FastLane Registration process to register a new institution.

Principal Investigator (PI) Functions FAQs

1. I want to get started in FastLane. How do I get my Principal Investigator (PI) password so I can access the FastLane Proposal Preparation application?
2. With implementation of the electronic signature process, are all pre- and post-award actions able to be done electronically?
3. Can you print out the PI/Co-PI Information form?
4. How will my Sponsored Project Office (SPO) know when I have allowed SPO/AOR access to the proposal?
5. In terms of how the process will actually flow, will an email be sent to both the Authorized Organizational Representative and the Sponsored Project Office notifying them of when a proposal is ready to be submitted?

6. How do I know NSF has successfully received my FastLane proposal?
7. After the proposal was submitted, I go into the Check Proposal Status application and the proposal is not listed. What is happening?
8. How do I print a copy of my completed report?
9. How can I change my email, phone, and fax numbers?
10. How do I add a Co-PI to the proposal?
11. I want to add more than four Co-PIs to my cover sheet. Can I do this?
12. I have an assistant who will be doing work on a proposal. How do I give my assistant access?

1. I want to get started in FastLane. How do I get my Principal Investigator (PI) password so I can access the FastLane Proposal Preparation application?

If you are a PI at a registered FastLane organization, get your password from your organization's Sponsored Project Office or from those individuals who have the authority to submit proposals to NSF.

To see if your organization is registered and to register it if necessary, see Registration for instructions.

See Passwords for more information on passwords.
See PI Functions Introduction for the activities of the PI.

2. With implementation of the electronic signature process, are all pre- and post-award actions able to be done electronically?

Yes.

3. Can you print out the PI/Co-PI Information form?

Yes. Do the following:
1. Access the **Form** Preparation screen (see Prepare a Proposal or Edit a Proposal). On the **Form Preparation** screen, click **Print** in the right navigation bar. The **Print Menu** screen displays.
2. Click the **GO** button for **PI Co-PI Info** button. The **PI/Co-PI Information Form** displays in PDF format. (If you need Adobe Reader, see Adobe Reader for FastLane.)
3. Click the **Print** icon in the upper-left of the screen. The PI/Co-PI Information Form prints.

4. How will my Sponsored Project Office (SPO) know when I have allowed SPO/AOR access to the proposal?

When you click on the **Go** button associated with one of the following options (see Allow or Remove SPO Access), FastLane automatically sends an email notification to each SPO in the organization that you selected on the Cover Sheet with permission to submit FastLane proposals:
- Allow SPO to view proposal
- Allow SPO to view and edit proposal
- Allow AOR to view, edit, and submit proposal

5. In terms of how the process will actually flow, will an email be sent to both the Authorized Organizational Representative and the Sponsored Project Office notifying them of when a proposal is ready to be submitted?

In the Proposal Preparation application, when the PI allows the SPO to View/Edit/Submit, FastLane automatically sends an email to those persons who have the authority to submit proposals for your organization.

6. How do I know NSF has successfully received my FastLane proposal?

A few seconds after the AOR successfully submits a proposal, a message pops up in FastLane confirming the submission. See View/Print a Submitted Proposal as a PI or View/Print a Submitted Proposal as an SPO/AOR for instructions to see and print the proposal.

A few days later, the proposal is uploaded into the NSF internal Proposal and Review System (PARS) and is listed in the Proposal Status application.

7. After the proposal was submitted, I go into the Check Proposal Status application and the proposal is not listed. What is happening?

There is a lag between the time the proposal is submitted via FastLane and the time it shows up in the FastLane Proposal Status applications. Here is the NSF process at the point of your proposal's submission in FastLane:

- You submit the proposal.
- FastLane generates an email notifying NSF's Proposal Processing Unit that a proposal has been submitted in the system.
- The Proposal Processing Unit logs in the proposal, prints and copies the proposal, and sends it to the relevant NSF program.
- The data is uploaded to the NSF Proposal and Review System (PARS).
- NSF staff accepts the data on the PARS.
- NSF staff downloads the Proposal Status information to the FastLane database that night for access by the PI and SPO/AOR.

8. How do I print a copy of my completed report?

Project reports can be initiated, submitted, and viewed from Research.gov. This functionality is no longer available in FastLane.

9. How can I change my email, phone, and fax numbers?

To change your personal PI information on file with the NSF, see Update PI Information for instructions.

10. How do I add a Co-PI to the proposal?

You may add as many as four Co-PIs to a proposal. See Add a Co-PI to a Proposal for instructions.

11. I want to add more than four Co-PIs to my cover sheet. Can I do this?

NSF policy permits only one PI and a maximum of four Co-PIs on a proposal. However, you can add individuals as non-Co-PI Senior Personnel to a proposal. See Add Senior Personnel to a Proposal for instructions.

12. I have an assistant who will be doing work on a proposal or report. How do I give my assistant access?

To provide access to your proposal for administrative support or proposal personnel who are not listed as PI or Co-PI, you must do the following:
1. Assign a proposal PIN if your assistant needs to work on a proposal
2. Your assistant then logs in to Proposals, Awards, and Status as an Other Authorized User (see Log In as an Other Authorized User for instructions).

To revoke access to a proposal, change the proposal PIN.

Proposal Preparation FAQs

1. Can you upload all of the current and pending support forms as one file, by clicking on the PI's name and clicking on the **Transfer File** button?
2. Can you edit the Table of Contents?
3. On the cumulative budget page, the number of Postdoctoral Associates, Other Professionals, Graduate Students, Undergraduate Students, Secretarial or Other is not adding correctly. What is wrong?
4. I get this error message: "At least one of the month counts must be greater than 0 on the support form for This Project." I have entered all zeros for the months. Why am I getting this error message?
5. How do I exit the FastLane Proposal Preparation application?
6. How will my Sponsored Project Office (SPO) know when I have allowed SPO access to the proposal?
7. How does the organizational administrator make required changes to a FastLane proposal once the PI allows SPO access?
8. When NSF prints the proposals, do they print the proposal in color?

1. Can you upload all of the current and pending support forms as one file, by clicking on the PI's name and clicking on the Transfer File button?

No. See Submit Current and Pending Support for Each Individual Separately for instructions.

2. Can you edit the Table of Contents?

No. FastLane creates the Table of Contents automatically, and the Table of Contents screen is a view-only screen.

3. On the cumulative budget page, the number of Postdoctoral Associates, Other Professionals, Graduate Students, Undergraduate Students, Secretarial or Other is not adding correctly. What is wrong?

The NSF Division of Grants and Agreements wants to know the cumulative number of these positions to be filled—not the total number of individuals filling these positions. Let's say you put John Smith as a Postdoctoral Associate for each of 3 budget years. On the cumulative budget, FastLane will calculate "3" as the number of Postdoctoral Associate personnel, rather than "1."

4. I get this error message: "At least one of the month counts must be greater than 0 on the support form for This Project." I have entered all zeros for the months. Why am I getting this error message?

You must indicate all time that will be given to the project, even time with no salary support. If you entered all zeros for the months, then FastLane assumes that the project requires no time and therefore you should not be applying for support. The *Grant Proposal Guide (GPG)* says: "The proposed project and all other projects or activities requiring a portion of time of the PI and other senior personnel should be included, even if they receive no salary support from the project(s)."

5. How do I exit the FastLane Proposal Preparation application?

FastLane does not require a logout. When you've finished your work in the FastLane Proposal Preparation application or any other application, just close your browser before leaving your computer.

6. How will my Sponsored Project Office (SPO) / Authorized Organizational Representative (AOR) know when I have allowed SPO / AOR access to the proposal?

When you click on the **Go** button associated with one of the following options (see Allow or Remove SPO/AOR Access), FastLane automatically sends an email notification to each person with SPO/AOR permissions in the organization:

- Allow SPO to only view proposal
- Allow SPO to view and edit proposal
- Allow AOR to view, edit, and submit proposal

7. How does the organizational administrator make required changes to a FastLane proposal once the PI allows SPO / AOR access?

As an SPO/AOR, you can have access to a proposal in either of the following ways:

- The PI grants the SPO/AOR access to either View/Edit/Submit (Only the AOR can submit). Once you have this access, the SPO/AOR can edit the proposal in the Research Administration module (see Edit a Proposal as an SPO/AOR for instructions).
- The PI assigns a PIN to the proposal and gives this PIN to the SPO. The SPO then logs in to the Proposals, Awards, and Status module as an Other Authorized User (see Log In as an Other Authorized User for instructions).

8. When NSF prints the proposals, do they print the proposal in color?

NSF cannot reproduce proposals in color. Therefore, it is better not to rely on colorized objects to make your arguments. If your paper requires either very high-resolution graphics or exact color representations for proper review, then you must submit paper copies of your proposal to NSF, in addition to submitting the proposal through FastLane.

Here is how to submit the paper copy:
In the **Other Information** section on the **Remainder of the Cover Sheet** screen, click the check mark box for High Resolution Graphics/Other Graphics Where Exact Color Representation Is Required For Proper Interpretation (GPG I.E.1). FastLane displays the number of paper copies of the entire proposal you must submit to NSF.

The paper copies must be postmarked, or have legible proof of mailing date assigned by the carrier, within 5 working days of the electronic submission.

See What Is the Cover Sheet for instructions on accessing the **Remainder of the Cover Sheet** screen.

Project Reports System FAQs

1. Why am I being transferred to Research.gov when I try to submit my project report?
2. What award types require submission of project reports?
3. Are annual project reports required for report periods ending in fiscal year 2006 or earlier?
4. Why are PIs not able to enter a reporting date range for a project report?
5. When can a Principal Investigator (PI) submit APRs and FPRs?
6. What happens if a PI or Co-PI is overdue on any project reports?
7. What is the affect on the award project reporting requirement if a time extension or additional time has been approved?
8. Can time extension requests/notifications be submitted in FastLane if there is time left on the award?
9. Why am I unable to submit an NSF approved no-cost extension request in FastLane?
10. How can I check the status of my project report in FastLane?

1. Why am I being transferred to Research.gov when I try to submit my project report?

NSF has transfered its project reporting functionality from FastLane to Research.gov. This means that Principal Investigators (PIs) and co-PIs must use Research.gov to prepare and submit final, annual, and interim project reports to NSF. Research.gov is NSF's grants management system that provides easy access to research-related information and grants management services in one location. Research.gov is the modernization of FastLane, providing the next generation of grants management capabilities for the research community.

The new project reporting service will meet the federal government's requirement that research agencies implement a new reporting format for research and research-related projects called the Research Performance Progress Report (RPPR). The RPPR is the result of a government-wide effort to create greater consistency in the administration of federal research awards by streamlining and standardizing reporting formats. This transition of project reports will includes a pilot and soft rollout to select institutions beginning in fall 2012.

2. What award types require submission of reports?

Annual Project Reports (APRs) are required for all standard grants, continuing grants and cooperative agreements as well. Final Project Reports (FPRs) and Project Outcome Reports (PORs) are required for all standard grants, continuing grants cooperative agreements, and individual fellowships. All submitted annual and final reports must be approved by an NSF Program Officer to meet the submission requirement.

3. Are annual project reports required for report periods ending in fiscal year 2006 or earlier?

Annual project reports are not required for awards whose reporting periods end on or before September 30, 2006, provided they are not used for increments in 2007 or later.

4. Why are PIs not able to enter a reporting date range for a project report?

As of November 18, 2006, PRS will preset the reporting periods at the initial award time. Any existing awards will be pre-loaded with outstanding reporting periods as well. If you believe the pre-loaded reporting periods for your award are incorrect, please contact the FastLane Help Desk and report the problem. Reporting functions have been moved to Research.gov.

5. When can a Principal Investigator (PI) submit APRs and FPRs?

PIs can only submit reports on or after the reporting period start date. The APRs are due 90 days before budget period (reporting period) end date. FPRs are due the day after final award expiration date. However, for awards with a current pending increment, if the associated APR report end date is beyond 09/30 for that year, then the APR can be submitted between 07/01 and 09/30.

6. What happens if a PI or Co-PI is overdue on any project reports?

An overdue project report impedes funding actions for the PI and Co-PIs on the award. Furthermore, overdue project reports will impede processing for all post-award actions for the PI and Co-PIs. Research.gov will allow submission of most post-award actions with a warning, but will not allow submission of PI/Co-PI change or withdrawal of Co-PI requests.

7. What is the effect on the award project reporting requirement if a time extension or additional time has been approved?

Any additional time added to the award will extend the total reporting requirement. If the additional time extends the last reporting period to more than 12 months, then a new project reporting period will be added. Reporting functions have been moved to Research.gov.

8. Can time extension requests/notifications be submitted in FastLane if there is time left on the award?

Extension requests have been migrated to Research.gov.
Research.gov will not allow submission of an NSF Approved No-Cost Extension Request for a Standard Grant and Cooperative Agreement when its award expiration date is more than 6 months greater than today's date, and for a continuing grant if it has pending increments.

Grantee Approved No-Cost Extension Notifications can be submitted at any time before the last 10 days of the award.

9. Why am I unable to submit an NSF approved no-cost extension request in FastLane?

Extension requests have been migrated to Research.gov. For Standard Grants and Cooperative Agreements, make sure the award expiration date is less than 6 months from

today. For Continuing Grants, check if there are pending increments. Please see FAQ 7 for additional information on time extensions.

10. How can I check the status of my project report in FastLane?

Project reports have been migrated to Research.gov

Sponsored Project Office Representative (SPO) / Authorized Organizational Representative (AOR) Functions FAQs

1. With implementation of the electronic signature process, are all pre- and post-award actions able to be done electronically?
2. In terms of how the process will actually flow, will an email be sent to both the Authorized Organizational Representative and the Sponsored Project Office notifying them of when a proposal is ready to be submitted?
3. How will I know that the PI has given me access to a proposal?
4. How does the organizational administrator make required changes to a FastLane proposal once the PI allows SPO access?
5. How do I know NSF has successfully received my FastLane proposal?
6. After the proposal was submitted, I go into the Check Proposal Status application and the proposal is not listed. What is happening?
7. At what point does NSF consider a proposal to be submitted?
8. What if our organization has multiple individuals that we wish to designate as AORs?
9. How will subawardee signatures be handled in the e-signature process?

1. With implementation of the electronic signature process, are all pre- and post-award actions able to be done electronically?

Yes.

2. In terms of how the process will actually flow, will an email be sent to both the Authorized Organizational Representative and the Sponsored Project Office notifying them of when a proposal is ready to be submitted?

In the Proposal Preparation application, when the PI allows the SPO to View/Edit/or the AOR to View/Edit/Submit , FastLane automatically sends an email to those persons who have SPO/AOR authority for your organization.

3. How will I know that the PI has given me access to a proposal?

When the PI clicks on the **Go** button associated with one of the following options, FastLane automatically sends an email notification to each SPO in your organization:

- Allow SPO to only view the proposal
- Allow SPO to view and edit proposal
- Allow AOR to view, edit, and submit proposal

4. How does the organizational administrator make required changes to a FastLane proposal once the PI allows SPO / AOR access?

As an SPO/ AOR, you can have access to a proposal in either of the following ways:

- The PI grants the SPO/AOR access to either View/ Edit/ Submit (only the AOR can submit). Once you have this access, the SPO/AOR can edit the proposal in the

Research Administration module (see Edit a Proposal as an SPO/ AOR for instructions).

- The PI assigns a PIN to the proposal and gives this PIN to the SPO. The SPO then logs in to the Proposals, Awards, and Status module as an Other Authorized User (see Log In as an Other Authorized User for instructions).

5. How do I know NSF has successfully received my FastLane proposal?

A few seconds after the SPO/AOR successfully submits a proposal, a message pops up in FastLane confirming the submission. See View/Print a Submitted Proposal as a PI or View/Print a Submitted Proposal as an SPO for instructions to see and print the proposal.

A few days later, the proposal is uploaded into the NSF internal Proposal and Review System (PARS) and is listed in the Proposal Status application.

6. After the proposal was submitted, I go into the Check Proposal Status application and the proposal is not listed. What is happening?

There is a lag between the time the proposal is submitted via FastLane and the time it shows up in the FastLane Proposal Status applications. Here is the NSF process at the point of your proposal's submission in FastLane:

- You submit the proposal.
- FastLane generates an email notifying NSF's Proposal Processing Unit that a proposal has been submitted in the system.
- The Proposal Processing Unit logs in the proposal, prints and copies the proposal, and sends it to the relevant NSF program.
- The data is uploaded to the NSF Proposal and Review System (PARS).
- NSF staff accepts the data on the PARS.
- NSF staff downloads the Proposal Status information to the FastLane database that night for access by the PI and SPO.

7. At what point does NSF consider a proposal to be submitted?

A proposal is considered as submitted when the SPO/AOR clicks the **Submit** button. NSF also determines whether the proposal has met its deadline by the time at which the **Submit** button is clicked.

8. What if our organization has multiple individuals that we wish to designate as AORs?

NSF does not limit the number of designated AORs for an organization. An organization may assign the AOR Functions permission to as many individuals as it deems necessary.

9. How will subawardee signatures be handled in the e-signature process?

NSF no longer requires that the proposing organization provide a paper copy of the subaward budget signed by the organization's Authorized Organizational Representative.

Technical FAQs

Technical FAQs Introduction

Print the contents of the Technical FAQs book.

Technical FAQs are organized into four groups:
- General
- Printing
- Proposal Preparation

All Technical FAQs are listed below.

General
1. What software do I need to use the FastLane Proposal Preparation application?
2. Which file formats, besides PDF, are now supported by FastLane?
3. How do I exit the FastLane Proposal Preparation application?
4. I get a security library error message. What should I do?
5. What security is provided with FastLane?
6. I cannot enter data in a FastLane field. It stops me from entering the last character. What should I do?
7. Should I keep on hitting a button if I do not get a quick response?

Printing
1. When trying to print a FastLane form (i.e., pull up a form in Adobe Reader) I get "An Error Occurred While Trying to Use This Document" error message or a blank page and a "Document Done" message. What is wrong?
2. When NSF prints the proposals, do they print the proposal in color?
3. My document had 1" margins and I have a printout to prove it. My program officer says my proposal is non-compliant because NSF prints it out with 0.85" margins. Why did FastLane change my document?
4. My project description was 15 pages in my word processor but when I pull it up in FastLane it is 16 pages. What is happening?
5. My PDF files look fine when I view/print them one at a time. But when I print the entire proposal (or when I send the proposal to my Sponsor Project Office or equivalent) characters are missing and equations corrupted. What is happening?
6. Can you print out the PI/Co-PI Information Form?
7. How do I print a copy of my completed report?

Proposal Preparation
1. After the proposal was submitted, I go into the Proposal Status Inquiry/FastLane organizational Reports application and get a message that the Proposal does not exist. What's happening?
2. Why is the Information Form not accepting my answers for the gender, ethnicity, and disability questions?

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Proposal Preparation

1. After the proposal was submitted, I go into the Proposal Status Inquiry/FastLane organizational Reports application and get a message that the Proposal does not exist. What's happening?
2. Why is the Information Form not accepting my answers for the gender, ethnicity, and disability questions?

Technical FAQs – General

1. What software do I need to use the FastLane Proposal Preparation application?
2. Which file formats, besides PDF, are now supported by FastLane?
3. How do I exit the FastLane Proposal Preparation application?
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6. I cannot enter data in a FastLane field. It stops me from entering the last character. What should I do?
7. Should I keep on hitting a button if I do not get a quick response?

1. What software do I need to use the FastLane Proposal Preparation application?

FastLane is a Web-based application. You need:

- A Web browser to access and work in FastLane (see Web Browser Compatibility and Accessibility Software)
- A Portable Document Format (PDF) file reader, generally Adobe Reader 5.0 or higher, for viewing and printing PDF files
- A word processor

See Software Requirements for FastLane.

FastLane no longer requires that you create your own PDF files. You can upload any document into FastLane that is in a format listed in Acceptable Formats for FastLane.

Only if you want to create your own PDF files to upload into FastLane, you also need: Adobe Acrobat Distiller or another application that creates PDF files.

2. Which file formats, besides PDF, are now supported by FastLane?

See Acceptable Formats for FastLane for a full rundown of the many formats FastLane now accepts.

When you upload your file, FastLane will convert it to a PDF file. You can then proofread the PDF file, accept it, and save it in FastLane. See Upload a File.

For problem-free uploading, continue to use standard fonts. This will avoid the need for font substitution.

Create PostScript files with dvips 5.66a, which comes with the MikTeX package.
Files created with dvipsk 5.58f, dvips(k) 5.86, groff, or troff may cause problems when the files are concatenated.

You can still upload PDF files. FastLane will accept them, if you do the following:

- Do not use PDFWriter to create the file.
- Embed and subset all fonts in the file.
- Put the files in Acrobat 3, 4, or 5 format.

3. How do I exit the FastLane Proposal Preparation application?

FastLane does not require a logout. When you are finished with your work in *any* FastLane application, just close your browser before leaving your computer.

4. I get a security library error message. What should I do?

You are receiving an error message because your computer has cached an old security certificate. To fix this, clear out your cache in your browser. Contact your organization's technical support personnel or FastLane User Support for instructions on how to clear the cache.

5. What security is provided with FastLane?

FastLane uses a Secure Server (https). All of your transactions with FastLane are encrypted.

6. I cannot enter data in a FastLane field. It stops me from entering the last character. What should I do?

The glitch is an embedded space in the field. You need to delete the space as follows:
1. Put your cursor in the field.
2. Space all the way to the right.
3. Back space all the way to the left, deleting all the characters.

You will now be able to enter all the information including the last character.

Note: If a field does not show up at all, it probably means that you are using a Windows 3.1 version of a browser on Windows 95, 98, or NX. Download and install the latest version of the browser to fix this problem. See Web Browser Compatibility.

7. Should I keep on hitting a button if I do not get a quick response?

No. Hitting the button repeatedly will not speed things up.

Technical FAQs – Printing

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2. When NSF prints the proposals, do they print the proposal in color?
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6. Can you print out the PI/Co-PI Information Form?

1. When trying to print a FastLane form (i.e., pull up a form in Adobe Reader) I get "An Error Occurred While Trying to Use This Document" error message or a blank page and a "Document Done" message. What is wrong?

Most likely, you are receiving these messages because your Adobe Reader has been configured as a plug-in. This prevents your browser from working on a secure Web site such as FastLane.

To fix the problem, delete the plug-in and configure your browser to use Adobe Reader as a helper. See Configure Adobe Reader for FastLane.

2. When NSF prints the proposals, do they print the proposal in color?

For cost and technical reasons, NSF cannot, at this time, reproduce proposals containing color. Therefore, it is better not to rely on colorized objects to make your arguments.

See What Is the Cover Sheet for instructions on accessing the **Remainder of the Cover Sheet** screen.

3. My document had 1-inch margins and I have a printout to prove it. My Program Officer says my proposal is non-compliant, because NSF prints it out with 0.85" margins. Why did FastLane change my document?

FastLane did not change the document. You may have used the **Fit to Page** option to print your proposal on your own printer. NSF's Proposal Processing Unit does not use that option. Please turn off the **Fit to Page** option and then view/print your proposal.

4. My project description was 15 pages in my word processor, but when I pull it up in FastLane it is 16 pages. What is happening?

If you are uploading a non-PDF file, be sure to check the number of pages and margin sizes.

If you are uploading a PDF file, adjustments may be necessary, because MSWord and similar word-processing packages determine page breaks by the settings and capabilities of the output device. That's why you may get different page breaks when you print to the PDF file rather than to your printer.

To solve this problem, follow these steps:
1. Set the default page size in the **Job Options** section of Adobe Distiller.
2. Correct the default page size.
3. Convert the file to PDF.

5. My PDF files look fine when I view/print them one at a time. But when I print the entire proposal (or when I send the proposal to my Sponsor Project Office or equivalent), characters are missing and equations corrupted. What is happening?

The fonts were not embedded in the files that you uploaded.

6. Can you print out the PI/Co-PI Information Form?

Yes. Do the following:
1. Access the **Form** Preparation screen (see Prepare a Proposal or Edit a Proposal). On the **Form Preparation** screen, click **Print** in the right navigation bar. The **Print Menu** screen displays.
2. Click the **GO** button for **PI Co-PI Info** button. The **PI/Co-PI Information Form** displays in PDF format. (If you need Adobe Reader, see Adobe Reader for FastLane.)
3. Click the **Print** icon in the upper-left of the screen. The PI/Co-PI Information Form prints.

Technical FAQs – Proposal Preparation

1. After the proposal was submitted, I go into the Proposal Status Inquiry/FastLane Organizational Reports application and get a message that the proposal does not exist. What's happening?
2. Why is the Information Form not accepting my answers for the gender, ethnicity, and disability questions?

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- The data is uploaded to the NSF Proposal and Review System (PARS).
- NSF staff accepts the data on the PARS.
- NSF staff downloads the Proposal Status information to the FastLane database that night for access by the PI and SPO/AOR.

2. Why is the Information Form not accepting my answers for the gender, ethnicity, and disability questions?

If you select "I choose not to reply to this question" for the gender, ethnicity, and disability questions, FastLane will not print a response on the form.

GRFP User Guides

GRFP FAQs

Graduate Research Fellowship Program FAQs Introduction

GRFP FAQs for Applicants

1. Who can help me with questions regarding the GRFP application process?
2. I lost my password for the GRFP application. What should I do?
3. I do not know my e-mail address to provide on the Forgot Password screen, or I have not received the temporary password. What should I do?
4. I lost my username for the GRFP application. How can I retrieve it?
5. Where do I direct technical questions regarding FastLane and the GRFP?
6. How can I determine if I am eligible to apply for the GRFP?
7. Applying for GRFP takes a lot of effort, and I don't want to apply if I'm not eligible. Can I find out if I'm eligible before I apply?
8. For GRFP eligibility purposes, do courses I'm currently taking count as complete?
9. I am in the process of becoming a permanent resident alien, but I won't have my green card until after the GRFP application deadline. Am I still eligible?
10. I don't see my field on the list provided in the program solicitation for the GRFP. Am I eligible?
11. What application materials do I need to submit for the GRFP?
12. I applied for the GRFP fellowship last year. Can I re-activate materials from an old application?
13. Where can I find information about the relevant deadlines for the GRFP?
14. Do I need to attend school full-time if awarded a GRFP fellowship?
15. What materials should I review before beginning my GRFP application?
16. I am preparing my application for the GRFP. How can I learn about the types of research projects NSF funds?
17. Can I submit my GRFP application material after the deadlines?
18. Is there any advantage to submitting my GRFP application before the deadline?
19. How is a semester or quarter hour defined for the GRFP application?
20. What academic transcripts are required for the GRFP and where should transcripts be sent?
21. How can I confirm that my electronic application for the GRFP was received?
22. I have applied to several graduate schools but I haven't been accepted to any yet. What should I put down for my proposed graduate institution for the GRFP?
23. The GRFP deadlines have passed, but I have now been published in a scientific journal. Can I add this information to my submitted application?
24. Should references or citations be included in the statements for the GRFP, and if so, do they count as part of the page limit?
25. What are the formatting and page number restrictions for the statements for the GRFP?
26. Should I send a transcript of my grades after I complete my courses this fall for the GRFP?
27. I attended a university overseas for one semester. It is very difficult to obtain a transcript. Do I still have to get a transcript from the international university?
28. Can I determine whether my transcripts successfully uploaded?
29. I am preparing my application for the GRFP, and have chosen an institution for my graduate work. If awarded a fellowship, can I change to another institution and still keep my fellowship?
30. Can you explain the Merit Review Criteria for the GRFP?

31. Who are the panelists that review the GRFP applications?
32. I heard that applications for the GRFP are pre-screened and if your GPA is below a certain average, your application isn't considered. Is this true?
33. Since applicants can't revise an application after it's been submitted, how do I make changes to my Reference Writers in the application for the GRFP?
34. How do I re-rank my Reference Writers if 5 have been added and ranked?
35. I submitted my application for the GRFP via FastLane. Do my Reference Writers have to submit by FastLane also?
36. I just started graduate school and my professors don't really know me well enough to fill out the References for the GRFP. What should I do?
37. How do my Reference Writers for the GRFP know their reference letters have been received by NSF?
38. Can my Reference Writers for the GRFP upload their comments, or do they have to type comments on a form in FastLane?
39. My institution has letters of reference on file in the Placement Office, or my reference has provided me with a general letter of reference. Can I go ahead and use those letters for the GRFP?
40. Can you tell me if you have received my reference Letters for the GRFP?
41. What type of information should Reference Writers include in their GRFP reference letter?
42. What is the deadline for submitting GRFP reference letters?
43. I am receiving an error when uploading my transcript file. How can I upload my transcript without receiving an error?
44. My Reference Writer did not receive the e-mail nominating them to serve as a reference writer or the e-mail containing their temporary password. How can I make sure they can submit a letter?
45. What should I take into consideration when I develop the Proposed Research Title?
46. What is an ORCID Identifier and how does NSF GRFP use this information?

1. Who can help me with questions regarding the GRFP application process?

For questions related to the application process or requirements, contact the Graduate Research Fellowship Operations Center. The Operations Center helpdesk is staffed between the hours of 8:30 am and 5:30 pm ET Monday through Friday. Contact the Center in any of these ways:

- E-mail: info@nsfgrfp.org
- Toll Free Phone: (1-866-673-4737)
- International Phone: 202-331-3542

2. I forgot my password for the GRFP application. What should I do?

On the main GRFP login screen, click Forgot My Password to request that a temporary password be sent to you at the primary e-mail address you provided during account setup. You may also reset your password directly on the Forgot My Password screen by using the password secret questions feature. This feature is only available if you used the secret questions option in setting up your account.

3. I do not know my e-mail address to provide on the Forgot Password screen, or I have not received the temporary password. What should I do?

For resetting a password directly, please use the Forgot Password link on the FastLane/GRFP login box. If you have forgotten your e-mail address, contact the GRF Operations Center at 1-866-673-4737 (office hours: Monday-Friday, 8:30 am - 5:30 pm ET) or e-mail: info@nsfgrfp.org.

4. I forgot my username for the GRFP application. How can I retrieve it?

You can click the Forgot Username link and retrieve your username after you have completed the screen form. Or contact the FastLane Help Central at 1-800-673-6188 (office hours: Monday-Friday, 7 am - 9 pm ET) and select the option for FastLane registration, password and login support (Option 1). Do not select the option for the Graduate Research Fellowship Program or e-mail: fastlane@nsf.gov.

5. Where do I direct technical questions regarding FastLane and the GRFP?

Contact the contact the GRF Operations Center at 1-866-673-4737 (office hours: Monday-Friday, 8:30 am - 5:30 pm ET) or e-mail: info@nsfgrfp.org.

6. How can I determine if I am eligible to apply for the GRFP?

Eligibility requirements are described in the Program Solicitation Section IV.

7. Applying for GRFP takes a lot of effort, and I don't want to apply if I'm not eligible. Can I find out if I'm eligible before I apply?

Applicants must self-certify that they have read and meet the eligibility requirements contained in the Program Solicitation. The text in the Program Solicitation is the only official eligibility guidance you can receive. Read the Program Solicitation closely to be sure you are interpreting the eligibility requirements properly. Seek additional advice from your mentors, professors, or academic advisors. When deciding to apply, consider your relative qualifications, eligibility concerns, and estimated time investment balanced against the benefits the GRFP provides. If you have questions about the eligibility guidelines in the Program Solicitation, you may contact the GRF Operations Center at info@nsfgrfp.org or 1-866-673-4737.

8. For GRFP eligibility purposes, do courses I'm currently taking count as complete?

No. GRFP eligibility is based on study completed as of August 1.

9. I am in the process of becoming a permanent resident alien, but I won't have my green card until after the GRFP application deadline. Am I still eligible?

Permanent resident status must be established by the application deadline.

10. I don't see my field on the list provided in the program solicitation for the GRFP. Am I eligible?

Additional information about supported fields of study can be found in Section IV of the Program Solicitation. If your field is not listed, please read Section IV of the Program Solicitation carefully, particularly the material concerning eligible fields of study.

11. What application materials do I need to submit for the GRFP?

Complete applications include (1) information that must be submitted electronically using NSF's FastLane Graduate Research Fellowship Program application module, including uploaded transcripts, and (2) three letters of reference submitted electronically by your nominated Reference Writers using NSF's FastLane Reference Letter submission.

12. I applied for the GRFP fellowship last year. Can I just send in copies of last year's information? Can I re-activate materials from an old application?

No. NSF cannot reactivate or reuse materials submitted in prior years. However, you can use the same user name and password from your old application to log into FastLane to begin a new application. All application information must be re-entered, except for your personal profile information, which can and should be updated.

13. Where can I find information about the relevant deadlines for the GRFP?

Complete information regarding GRFP deadlines, requirements, and submission methods can be found at the Graduate Research Fellowship Program module and the Program Solicitation.

14. Do I need to attend school full-time if awarded a GRFP fellowship?

Yes, the Fellowship is intended only for students enrolled in full-time programs leading to graduate degrees in science and engineering.

15. What materials should I review before beginning my GRFP application?

Read and understand the Program Solicitation to get an understanding of the program benefits, eligibility, requirements, and how your application will be evaluated. Review the Applicant User Guide to identify the information you need to provide and specific instructions for filling out the online application. Review the GRFP FAQs, which clarify the Program Solicitation and the Applicant User Guide. These links can be found at FastLane's GRFP module.

16. I am preparing my application for the GRFP. How can I learn about the types of research projects NSF funds?

You can visit NSF's website (www.nsf.gov) for information and guidance about current and emerging themes within the NSF directorates (departments). You can review the NSF Guide to Programs at www.nsf.gov/funding/ as well as the NSF's database of funded projects (awards) at www.nsf.gov/awardsearch/ for specific funding information. You should also discuss your proposed research with your mentors, professors, or researchers, who have applied for NSF grants in your field.

17. Can I submit my GRFP application material after the deadlines?

GRFP does not accept late application materials. Applicants must adhere to the deadline dates for the Primary Field of Study and the deadline time for receipt (8 p.m. Eastern Time) for submitting both the FastLane Application Information electronically and the Supporting Application Materials. These deadlines are posted at https://www.fastlane.nsf.gov/grfp/. All application materials must be received by NSF by the Field of Study deadline date and time. Applications received after the Field of Study deadline and time will be returned without review.

18. Is there any advantage to submitting my GRFP application before the deadline?

You are encouraged to submit your application in advance of the deadline to avoid delays in electronic receipt that may be caused by traffic volume. We suggest that you complete the Personal, Relevant Background and Future Goals Statement and the Graduate Research Plan Statement as early as possible to allow ample time for editing. This will eliminate delays at the time of submission. Also, do not wait until submission to check for error and warning messages. Periodically click the **Check Application Completeness** button and resolve errors well before the deadline date to avoid delays at the time of submission.

19. How is a semester or quarter hour defined for the GRFP application?

Most U.S. institutions of higher education are on either a semester system or a quarter hour system and count their course credits accordingly. For the purposes of the GFRP application, use whatever system is applicable to you. Official transcripts normally include, next to the course grade, the credits per course with cumulative totals at the end. The transcript key should include a statement of the credit system the school uses; the registrar's office for that institution can also provide this information.

20. What official academic transcripts are required for the GRFP and where should the transcripts be sent?

You must list all undergraduate and graduate institutions you attended in the Education and Work Experience section of the application (exceptions are listed below). Official or unofficial academic transcripts are required for all institutions listed. If your undergraduate transcripts include all transfer credits, such as community college or summer courses, you do not need to list each undergraduate institution attended, only the degree-granting institution. If the same transcript applies to more than one entry on the Education and Work Experience section, you only need to upload the transcript once, and should use the available checkbox to indicate that the transcript for that school is included on another transcript that you have uploaded. Only electronic transcripts are accepted, and they must be submitted as part of the online application. Please read the Application Preparation Instructions in the Program Solicitation for more information on the transcripts requirements.

21. How can I confirm that my electronic application for the GRFP was received?

FastLane will display the status of application information that is received. Applicants can view the status by accessing FastLane. The status of the application is displayed on the screen after you log into the system; after you submit your application, a screen displays stating that your application is now received. **If the submission of the FastLane application package was successful and if you provided a valid e-mail address as part of the application, you will also receive a confirmation e-mail message that same day. If the submission was not successful, you will not receive a confirmation e-mail message.** Throughout the process you can view and print your application using the View/Print Application option.

22. I have applied to several graduate schools, but I haven't been accepted to any yet. What should I put down for my proposed graduate institution for the GRFP?

You do not have to be accepted to an institution before listing it as the Proposed Graduate Institution on your application. Simply select the institution you wish to attend if you were granted a fellowship. This information is not provided to the reviewers.

23. The GRFP deadlines have passed, but I have now been published in a scientific journal. Can I add this information to my submitted application?

Review of the application and reference letters is based solely on materials received by the application and reference letter deadlines. NSF does not permit revisions or additions to the application after the submission deadline.

Once an application has been submitted, the only updates to the application content that can be made are to your contact information.

24. Should references or citations be included in the statements for the GRFP, and if so, do they count as part of the page limit?

Yes on both counts. References and/or citations should be included in your statements and do count towards the page limit.

25. What are the formatting and page number restrictions for the statements for the GRFP?

- All statements should be written **using standard 8.5" x 11" page size, 12-point, Times New Roman or 12-point , Computer Modern font, 1" margins on all sides, and must be single spaced or greater. Only publications and presentation citations may be a smaller font, no less than 10-point Times New Roman or 10-point, Computer Modern.** Small type size makes it difficult for reviewers to read the application; consequently, the use of small type not in compliance with the application guidelines may be grounds for NSF to return the application without review.
- There is a 3-page limit for the Personal, Relevant Background and Future Goals Statement, and a 2-page limit for the Graduate Research Plan Statement. References and citations are included toward the page limits.
- Character spacing should use normal (100%) single-line space option. Do not condense line spacing or reduce the character spacing scale. Adherence to type size, character spacing, and page length is required. Applications that do not adhere to these guidelines will be returned without review.
- Images may be included in your statements. All images, footnotes, endnotes, and other citations are included in the page limit.

26. Should I send a transcript of my grades after I complete my courses this fall for the GRFP?

No. As part of the application process, you should submit official or unofficial transcripts of your academic records, graduate and undergraduate, completed as of the date of application.

27. I attended a university overseas for one semester. It is very difficult to obtain a transcript. Do I still have to get a transcript from the international university?

Applicants are required to submit Official or Unofficial Academic Transcripts electronically as described in the Program Solicitation. However, applicants may not be disqualified if they are unable to submit Academic Transcripts from international institutions, if they can

provide other evidence of academic achievement at those institutions in the application. Transcripts must be in English.

28. Can I determine whether my transcripts successfully uploaded?

The Education and Work Experience page will display a “View PDF” option in the entry for each institution for which you have successfully uploaded a transcript. You can click this option to verify that your transcript uploaded correctly. Additionally, you may select the Check Application Completeness button to display the errors and warnings for missing information in the application, including missing transcripts for institutions listed in the Education and Work experience section.

29. I am preparing my application for the GRFP, and have chosen an institution for my graduate work. If awarded a fellowship, can I change to another institution and still keep my fellowship?

Yes, the Fellowship is portable. Fellows must be enrolled in a university, college, or non-profit academic institution of higher education accredited in, and having a campus located in, the United States that offers graduate degrees in eligible science and engineering fields by fall of the award year.

30. Can you explain the Merit Review Criteria for the GRFP?

This refers to the criteria used to evaluate fellowship applications to assess their merit. Complete information regarding the NSF Merit Review Criteria, how the criteria relate to the GRFP application, and the GRFP review process can be found in the Program Solicitation in the GRFP module of FastLane. Refer to the Proposal & Award Policies & Procedures Guide (PAPPG) , Chapter III for further information.

31. Who are the panelists that review the GRFP applications?

Panelists are experts in the relevant academic disciplines and have experience in graduate education. GRFP matches applications with panelists whose discipline most closely correlates with the proposed research topic. However, applicants should keep in mind that an academic discipline consists of many areas.

32. I heard that applications for the GRFP are pre-screened and that if your GPA is below a certain average, your application isn't considered. Is this true?

No. Applications are not pre-screened for GPAs.

33. Since applicants cannot revise an application after it has been received, how do I make changes to my list of Reference Writers in the application for the GRFP?

Changes can be made before the Reference Writer Letter deadline to references through the Manage References link listed under the Application Optional Task List.

34. How do I re-prioritize the order of my Reference Writers if 5 have been added?

You can change the priority list of your Reference Writers by selecting the Manage References option under Application Package Optional Task List. On the Manage References

page, there will be a button titled Edit Reference Writer Ranking. Once selected, a drop-down menu with a range of ranks, 1-5 will appear. Click on the drop-down menu to select a new rank for the reference letter. Please note that each reference letter must have a unique rank – it is not possible to save your changes if two Reference Writers have the same rank.

35. I submitted my application for the GRFP via FastLane. Do my Reference Writers have to submit by FastLane also?

Yes. NSF accepts only reference letters that are submitted via FastLane for the NSF Graduate Research Fellowship Program. Reference letters must be received by the published reference letter deadline and time. The applicant should monitor the status of reference letter submission before the deadline, to ensure three letters are received by NSF.

36. I just started graduate school, and my professors don't really know me well enough to fill out the references for the GRFP. What should I do?

The applicant should submit references from faculty members who have current knowledge of the applicant's academic work and scholarly development. If that is not possible, as in the case of applicants who have been out of school for some time, letters from other faculty or employers would be appropriate. NSF suggests that at least two of the three Reference Writers are individuals with whom you have worked in your present (or most recent) department, including your thesis adviser if applicable.

37. How do my Reference Writers for the GRFP know their reference letters have been received by NSF?

If receipt of the FastLane reference is successful, the Reference Writer will receive a confirmation e-mail message on the same day. The Reference Writer can also log back into FastLane and view the received reference letter PDF.

38. Can my Reference Writers for the GRFP upload their Letter, or do they have to type comments on a form in FastLane?

Referees will upload their Letter into FastLane using the provided utility. FastLane does not provide a text box for typing a letter.

39. My institution has letters of reference on file in the Placement Office, or my reference has provided me with a general letter of reference. Can I go ahead and use those letters for the GRFP?

The letters need to be uploaded by your Reference Writer into FastLane. General letters of reference are not recommended; they should be tailored to your GRFP application. Panelists look for reference letters that demonstrate potential for success in science and engineering as well as specifically address your intellectual merit and the broader impact of your activities. Applicants should check the status of reference letter submission before the reference writer deadline, to ensure three letters are received by NSF.

40. Can you tell me if you have received my reference letters for the GRFP?

Applicants can check the status of each reference letter by logging into FastLane and clicking the **Manage References** link.

41. What type of information should Reference Writers include in their GRFP reference letter?

We ask that in a reference letter, the Reference Writer addresses the following:

- How long have you known the applicant, and in which capacity? Please note that the more specific (as opposed to generic) a letter you provide, the better reviewers can evaluate the candidate. **If you are the candidate's research supervisor, you must comment on the originality of his/her research statement, and the role, if any, you had in assisting the student with this application.**
- What is the applicant's potential for contributing to a globally-engaged STEM workforce? Please include statements about the applicant's academic potential and, if applicable, prior research experiences, proposed research, and other information that will enable review panels to evaluate the application according to the NSF Merit Review Criteria. Other information may include professional skills and abilities such as analytical, written and oral communication, interpersonal, teamwork, and leadership skills, initiative, integrity, maturity, respect for others and trustworthiness.

- What are the Intellectual Merit and Broader Impacts demonstrated by the applicant? The application will be evaluated on the basis of the two National Science Board approved merit review criteria, Intellectual Merit and Broader Impacts. **Please address both the Intellectual Merit and Broader Impacts of the applicant in your letter.** Please refer to Section IV of the Solicitation <HYPERLINK> for more information about the Review Process and Broader Impacts.

Reviewers evaluating applications submitted to the Graduate Research Fellowship Program may consider the following with respect to the **Intellectual Merit Criterion**: the potential of the applicant to advance knowledge based on totality holistic review of the content in the application, including the two statements, the strength of the academic record and accomplishments, and the reference letters.

Reviewers may consider the following with respect to **Broader Impacts Criterion**: the two statements, personal, professional, and educational experiences, the future plans and prior accomplishments in the integration of research and education, the potential for future broader impacts, and the reference letters.

42. What is the deadline for submitting GRFP reference letters?

Reference letters must be submitted by the Reference Letter deadline posted on the GRFP Solicitation.

43. I am receiving an error when uploading my transcript file. How can I upload my transcript without receiving an error?

Many universities will place a layer of encryption on official transcript files which can cause issues when uploading to FastLane. If you receive an error, please print a copy of the transcript and scan to PDF prior to uploading.

44. My Reference Writer did not receive the e-mail nominating them to serve as a reference writer or the e-mail containing their temporary password.

Your reference writer may not have received the e-mail nominating them as a Reference Writer for one or more of several reasons. Please check the following if this occurs:

1. **Confirm that you have selected to send the e-mail.** When adding your Reference Writer to your application, you must hit the "Send E-mail" link on the References Screen to send the e-mail notification to the Reference Writer.
2. **Check the Reference Writer's e-mail address.** Check to ensure that the e-mail address you have entered for the Reference Writer is accurate. An exact e-mail address is crucial to matching the reference writer and the applicant in the FastLane GRFP Application Module. If there is a typo or you need to change the e-mail address, you may edit the Reference Writer record (either from your un-submitted Application or from the Manage References link on your GRFP homepage). After editing the Reference Writer e-mail address, the "Send E-mail" link will reappear on the References screen, allowing you to re-send the nomination e-mail.
3. **Check SPAM folders.** Ask your Reference Writer to check their SPAM or Trash folder to ensure that the e-mail did not get sent to one of those folders inadvertently.
4. **Use an alternate e-mail address.** It is possible that the e-mail domain used by your Reference Writer is rejecting the e-mail and not allowing delivery. In this case, request an alternate e-mail from your Reference Writer to be used for this purpose. You can then edit the e-mail address using the directions in step 2 above.

45. What should I take into consideration when I develop the Proposed Research Title?

The title should be brief, informative, scientifically or technically valid, intelligible to a scientifically or technically literate reader, and suitable for use in the public press. It should describe in succinct terms your proposed research, reflecting the contents of your Graduate Research Plan Statement.

46. What is an ORCID Identifier and how does NSF GRFP use this information?

Open Researcher and Contributor ID (ORCID) <hyperlink - http://orcid.org> provides a persistent digital identifier that distinguishes you from every other researcher and, through integration in key research workflows such as manuscript and grant submission, supports automated linkages between you and your professional activities ensuring that your work is recognized.
The submission of the ORCID Identifier is optional. ORCID Identifiers will not be shared with reviewers.

GRFP FAQs for Reference Writers

1. What type of information should Reference Writers include in their GRFP reference letter?
2. I have been requested to provide a reference letter for a Graduate Research Fellowship applicant. I have lost the e-mail from FastLane on how to log in as a reference writer. Who can help me retrieve my login information?
3. I lost my password for the GRFP application. How can I get it?
4. I have been requested to provide a reference letter for a Graduate Research Fellowship applicant. I have lost the e-mail from FastLane. I would like another copy of the e-mail. Who should I ask to resend the e-mail?
5. I am unable to log in using the Temporary Password I received via e-mail.
6. I did not receive the e-mail nominating me to serve as a reference writer or the e-mail containing my temporary password.

1. What type of information should Reference Writers include in their GRFP reference letter?

NSF appreciates your input in the selection process for the NSF GRFP Graduate Research Fellowships. Letters of references play a crucial role in the review and selection of fellowship awardees. Complete information regarding the NSF GRFP can be found in the Program Announcement<HYPERLINK>. Reference letters should comply with the format guidelines below.

Reference Letter Format Guidelines:
- Letters should be **2 pages** or less**. The system will not allow you to upload a letter that exceeds 2 pages.**
- Letters should be written using standard 8.5" x 11" page size, 12-point, Times New Roman font or Computer Modern (LaTex) font, and 1" margins on all sides
- Letters should be be single spaced or greater – character spacing should use normal (100%) single-line space option
- Letters should be submitted on professional letterhead
- Letters should be signed, and include the professional title of the reference writer, department, and institution

In your letter, please address the following items:
1. How long have you known the applicant, and in which capacity? Please note that the more specific (as opposed to generic) a letter you provide, the better reviewers can evaluate the candidate. **If you are the candidate's research supervisor, you must comment on the originality of his/her research statement, and the role, if any, you had in assisting the student with this application.**
2. What is the applicant's potential for contributing to a globally-engaged STEM workforce? Please include statements about the applicant's academic potential and, if applicable, prior research experiences, proposed research, and other information that will enable review panels to evaluate the application according to the NSF Merit Review Criteria. Other information may include professional skills and abilities such as analytical, written and oral communication, interpersonal, teamwork, and leadership skills, initiative, integrity, maturity, respect for others and trustworthiness.

3. What are the Intellectual Merit and Broader Impacts demonstrated by the applicant? The application will be evaluated on the basis of the two National Science Board approved merit review criteria, Intellectual Merit and Broader Impacts. **Please address both the Intellectual Merit and Broader Impacts of the applicant in your letter.** Please refer to Section IV of the Solicitation <HYPERLINK> for more information about the Review Process and Broader Impacts.
Reviewers evaluating applications submitted to the Graduate Research Fellowship Program may consider the following with respect to the **Intellectual Merit Criterion**: the potential of the applicant to advance knowledge based on totality holistic review of the content in the application, including the two statements, the strength of the academic record and accomplishments, and the reference letters.

Reviewers may consider the following with respect to **Broader Impacts Criterion**: the two statements, personal, professional, and educational experiences, the future plans and prior accomplishments in the integration of research and education, the potential for future broader impacts, and the reference letters.

2. I have been requested to provide a reference letter for a Graduate Research Fellowship applicant. I have lost the e-mail from FastLane on how to log in as a reference writer. Who can help me retrieve my login information?

On the Reference Writer login screen, click on Create a new Password to setup a new password. If you have trouble using the Create new password screen, contact the GRF Operations Center 1-866-673-4737 (office hours: Monday-Friday, 8:30 am - 5:30 pm ET) or e-mail info@nsfgrfp.org

3. I lost my password for the GRFP application. How can I get it?

On the Reference Writer login screen, click on Create a new Password to setup a new password. If you have any trouble using the Create new password screen, contact the GRF Operations Center at 1-866-673-4737 (office hours: Monday-Friday, 8:30 am - 5:30 pm ET) or e-mail info@nsfgrfp.org.

4. I have been requested to provide a reference letter for a Graduate Research Fellowship applicant. I have lost the e-mail from FastLane. I would like another copy of the e-mail. Who should I ask to resend the e-mail?

Ask the applicant to delete and re-enter you as a Reference Writer. The system will re-enable the 'Send E-mail' option if the applicant deletes an existing entry from the Reference Writers list and re-adds the Reference Writer information.

5. I am unable to log in using the Temporary Password I received via e-mail.

If you have received your temporary password and are unable to login to the FastLane GRFP Reference Writer module, check the following:

1. **Check your e-mail address.** Check to confirm you are using the same e-mail address provided by the Applicant when attempting to login. The e-mail address provided by the Applicant can be found in the body of the e-mail you received with your temporary password. An exact e-mail address is crucial to matching the reference writer and the applicant in the FastLane GRFP Application Module.
2. **Check the temporary password.** Record the temporary password and type it into FastLane manually rather than copying and pasting.
3. **Ensure you are using the most recent Temporary Password received.** Occasionally, a user will inadvertently create a password multiple times. If this occurs, use the temporary password in the most recent e-mail you received.

6. I did not receive the e-mail nominating me to serve as a reference writer or the e-mail containing my temporary password.

Please check the following if this occurs:

1. **Confirm your e-mail address with the applicant.** Check to ensure that the e-mail address the applicant entered for you is accurate. If there is a typo or if the applicant needs to change the e-mail address, the applicant can edit the Reference Writer record and resend the nomination e-mail. An exact e-mail address is crucial to matching the reference writer and the applicant in the FastLane GRFP Application Module.
2. **Check SPAM folders.** Check your SPAM or Trash folder to ensure that the e-mail did not end up in one of those folders inadvertently.

3. **Use an alternate e-mail address.** It is possible that your e-mail domain is rejecting the e-mail and not allowing delivery. In this case, provide an alternate e-mail address to the applicant and the applicant will be able to edit your Reference Writer record and re-send the nomination e-mail.
4. **The applicant may no longer need your letter.** Please check with the applicant.

GRFP FAQs for Fellows

1. I have been awarded a Fellowship under the NSF GRFP. How is my Fellowship going to be administered by NSF? What do I need to do to get started?
2. I have been awarded a Fellowship under the NSF GRFP. Who can help me with various questions related to the Fellowship?
3. I have been awarded a Fellowship under the NSF GRFP. How do I log into NSF GRFP?
4. I have a Fellowship under the NSF GRFP. My email address has changed. How can I update my email address in the system?
5. I have a Fellowship under the NSF GRFP. I forgot my login ID. How can I look it up?
6. I have a Fellowship under the NSF GRFP. I forgot my password. What should I do?

1. I have been awarded a Fellowship under the NSF GRFP. How is my Fellowship going to be administered by NSF? What do I need to do to get started?

NSF uses the FastLane Graduate Research Fellowship Program System to administer the fellowships. As a fellow, you will manage your fellowship activities through the same online system with the same login account that you use for completing your application to the Graduate Research Fellowship Program. A number of documentations, including a User Guide, are located on the left side of the screen when you log in. The guide provides step-by-step instructions on how to update your Fellowship Status and request changes. Please read the manual carefully before using the system.

2. I have been awarded a Fellowship under the NSF GRFP. Who can help me with various questions related to the Fellowship?

Please send fellowship-related questions to the Coordinating Official (CO) at your affiliated institution. The Institution Directory is located on the left side of the screen when you log into FastLane's Graduate Research Fellowship Program (GRFP) link. Section 3 of the Information for Graduate Research Fellows Guidelines, located on the left side of the screen after you log into Fastlane/GRFP, provides more detailed information. The CO is the first person you should contact with Graduate Fellowship-related questions. If your CO is unable to help, you can contact the NSF GRFP office directly.

3. I have been awarded a Fellowship under the NSF GRFP. How do I log into NSF GRFP?

NSF GRFP is the Graduate Research Fellowship Program link on the FastLane homepage. Log in using the same login account that you had used to submit your fellowship application.

4. I have a Fellowship under the NSF GRFP. My email address has changed. How can I update my email address in the system?

Log into the Graduate Research Fellowship application, and click the "Update My Profile" link to update your primary and secondary email addresses. If you have difficulty logging in and need to update your primary email address, please use the Forgot Password to reset your password directly. If you still have difficulty, please contact the FastLane Helpdesk at 1-800-673-6188 or email fastlane@nsf.gov.

5. I have a Fellowship under the NSF GRFP. I forgot my login ID. How can I look it up?

You can use the Forgot Username link to retrieve your username. You may also contact your school's coordinating official to look up your username. Or contact the FastLane HelpDesk at 1-800-673-6188 or email fastlane@nsf.gov.

6. I have a Fellowship under the NSF GRFP. I forgot my password. What should I do?

In the Login box for GRFP, click Forgot Password. The system will email you a temporary password. Once you receive the temporary password, return to the login page and enter your user ID and temporary password. You can also reset your password directly on the Forgot Password screen.

GRFP FAQs for Coordinating Officials

1. How can I view Grants Roster report for the upcoming Fellowship Year?
2. When do I need to approve a Tenure Change Request?
3. How do I view my Institutions Financial Summary?

1. How can I view my Grants Roster report for the upcoming Fellowship Year?

Detailed instructions for viewing a Grants Roster report can be found in the Coordinating Official System Guide.

2. When do I need to approve a Tenure Change Request?

Fellowship Status Change Requests needing approval will appear in the Coordinating Official Task List. Detailed instructions for Fellowship Status Change Requests can be found in the Coordinating Official System Guide.

3. How do I view my Institutions Financial Summary?

Detailed instructions for viewing your Institution's Financial Summary can be found in the Coordinating Official System Guide.

Applicant User Guide

Applicant User Guide

Conventions used in this guide

The first time they are introduced, names of on-screen features appear in bold.

EXAMPLE: Click on the **Search** tab.

Uniform Resource Locators (URLs) are in bold characters and are underlined.

EXAMPLE: Type the following address in your browser's address bar: http://fastlane.nsf.gov.

Many software features and some business processes are explained in a reference table format. An on-screen term appears in the left column and a description of the term appears in the right column.

EXAMPLE:

Feature	Description
Applicant ID	The Applicant ID is the number assigned to you when you become an applicant.

The following three conventions serve as both examples and descriptions:

WARNING: Warnings provide information designed to prevent critical errors from occurring. If you see a warning, stop and read it before continuing.

NOTE: While Notes do not describe critical information, we suggest that you stop and read them, too. The information in a note can prevent minor errors from occurring. Other notes simply provide information designed to deepen your understanding of a software feature.

TIP: Tips provide information designed to increase your productivity.

Getting Access

Getting Access

Registration (First-time users only)

1. Access the GRFP application by typing the following address into your browser address bar: http://www.fastlane.nsf.gov. Click on the **Graduate Research Fellowship Program** link at the top of the page. This will take you to the GRFP application within FastLane. Once on the GRFP site, click on the **Register Here** link (pictured below) to begin the Fellowship Application.

Figure 1: Registration Link

The Rules of Behavior page will be displayed. This page is used to ensure that you understand the rules of behavior involved with interacting with a government computer system. You are required to read and accept the rules of behavior before continuing through the Registration Process. Click the "**I have read and accept the Rules of Behavior"**, and click the **Accept** button (pictured below).

RULES OF BEHAVIOR

To continue, you must accept the Rules of Behavior.

Please read the rules below, check the box and click the "Accept" button. Clicking the "Decline" button will take you to the Log In screen.

This is a National Science Foundation (NSF) Federal Government computer system. Any system activity may be monitored and any information stored within the system may be retrieved and used by authorized personnel for law enforcement, management, routine system operations, or other purposes. By using this computer system, you are consenting to such monitoring and information retrieval and use.

Unauthorized use of the system, including disclosure of information covered by the Privacy Act or other sensitive information, or attempts to defeat or circumvent security features, is prohibited and could result in disciplinary action, civil and/or criminal penalties. Users should be aware that they have no expectation of privacy when using the NSF-provided computer system (including any removable media used in conjunction with the system), accessing the Internet, or using electronic mail systems.

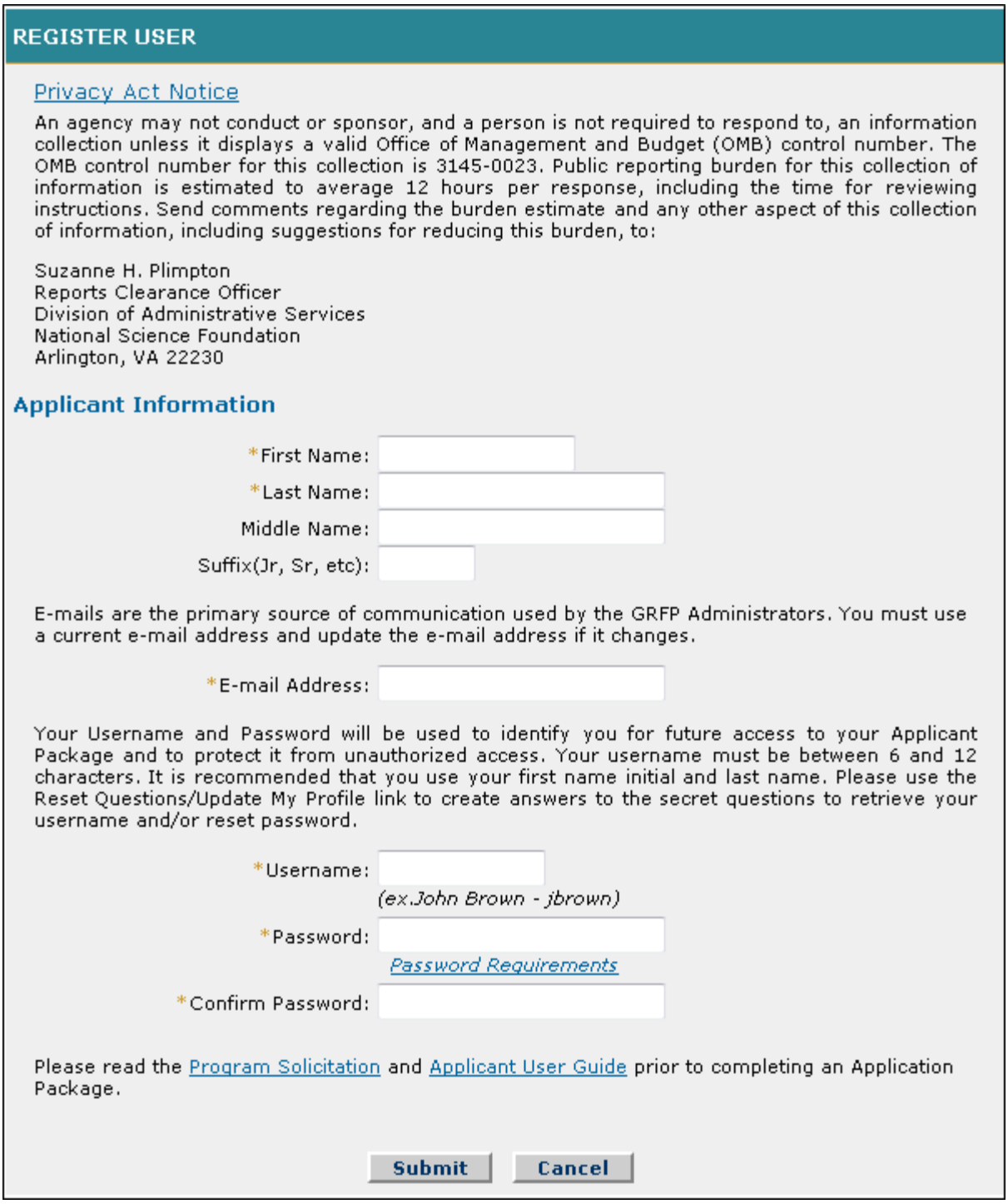
All information maintained within or retrievable through the NSF computer system, including electronic mail files, may be reviewed and retrieved by the Department of Homeland Security; NSF officials who have a legitimate reason to do so when authorized by the Director or Deputy Director; or by the Inspector General.

☐ **I have read and accept the Rules of Behavior.**

Accept Decline

Figure 2: Rules of Behavior Screen

The Applicant Information page will be displayed. This page will be used to create your user profile. All required information (indicated by an asterisk) must be completed in order to save the data and submit the registration form.



REGISTER USER

Privacy Act Notice

An agency may not conduct or sponsor, and a person is not required to respond to, an information collection unless it displays a valid Office of Management and Budget (OMB) control number. The OMB control number for this collection is 3145-0023. Public reporting burden for this collection of information is estimated to average 12 hours per response, including the time for reviewing instructions. Send comments regarding the burden estimate and any other aspect of this collection of information, including suggestions for reducing this burden, to:

Suzanne H. Plimpton
Reports Clearance Officer
Division of Administrative Services
National Science Foundation
Arlington, VA 22230

Applicant Information

*First Name:
*Last Name:
Middle Name:
Suffix(Jr, Sr, etc):

E-mails are the primary source of communication used by the GRFP Administrators. You must use a current e-mail address and update the e-mail address if it changes.

*E-mail Address:

Your Username and Password will be used to identify you for future access to your Applicant Package and to protect it from unauthorized access. Your username must be between 6 and 12 characters. It is recommended that you use your first name initial and last name. Please use the Reset Questions/Update My Profile link to create answers to the secret questions to retrieve your username and/or reset password.

*Username:
(ex.John Brown - jbrown)
*Password:
Password Requirements
*Confirm Password:

Please read the Program Solicitation and Applicant User Guide prior to completing an Application Package.

Submit Cancel

Figure 3: Applicant Information

2. Type your first name in the **First Name** field.
3. Type your last name in the **Last Name** field.
4. Type your middle name in the **Middle Name** field (optional).
5. Type your suffix in the **Suffix** field (optional).

6. Type your e-mail address in the **E-mail Address** field.

NOTE: E-mails are the primary source of communication used by the GRFP Administrators. It is important for you to use an active e-mail address and to update the e-mail address if it changes.

NOTE: You can view NSF's Privacy Policy by selecting the Privacy Act Notice link at the top of the Register User screen, and on every application section.

7. Select a username and type it in the **Username** field.

NOTE: User name must be between 6 and 12 characters (e.g., jbrown). It is recommended that you use the first letter of your first name and your last name.

8. Choose a password and type it in the **Password** field.

NOTE: Password length must be between 6 and 20 characters. The password must contain at least one alphabetic and one numeric character. Passwords are not case sensitive. You cannot reuse the last three passwords you have used. Passwords expire every 365 days. Passwords for users with Financial Functions permissions expire.

9. Re-type your password in the **Confirm Password** field.

10. Click **Submit** to save the information and proceed to the next step.

Logging In (only after Registration)

Access the GRFP application by typing the following address into your browser address bar: http://www.fastlane.nsf.gov. Click on the **Graduate Research Fellowship Program** link at the top of the page. This will take you to the GRFP application within FastLane. Once on the GRFP site, enter your login information in the log in box on the top right side of the screen.

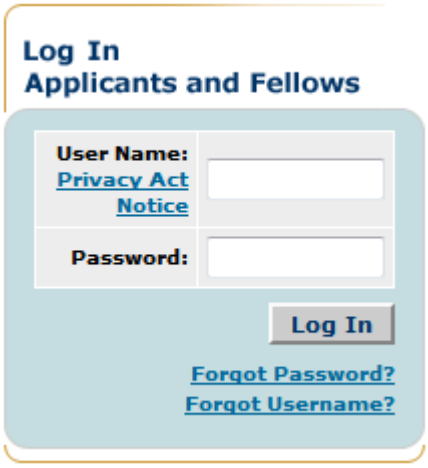


Figure 4: Log In

11. Type your user name in the **User Name** field.

12. Type your password in the **Password** field.

13. Click **the Log In** button.

The GRFP Application home page appears with your Application Task List and current Applicant Data.

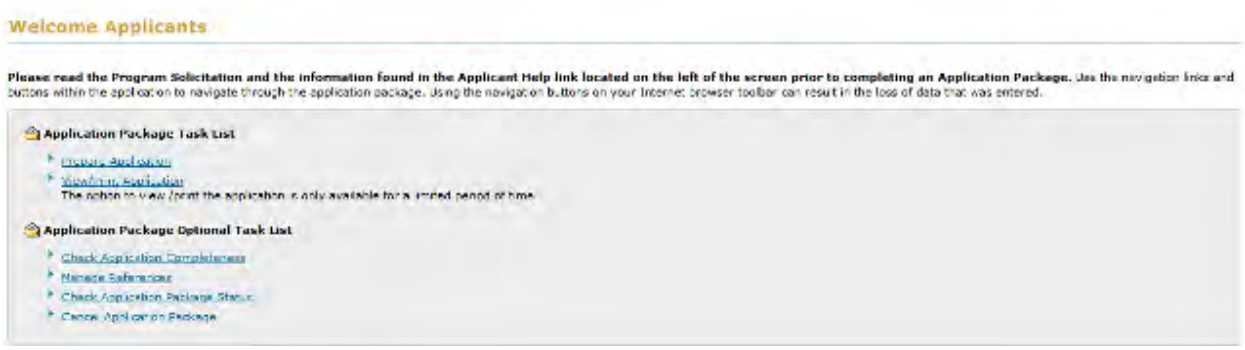


Figure 5: Welcome Applicants

Resetting a Password

If you have forgotten your password you have two options for resetting your password:

1. The system can e-mail a temporary password to the e-mail address provided at account creation.

2. If your e-mail address has changed since account creation, you can reset your password by confirming the answers to two secret questions.

To have the system e-mail you a temporary password:

1. Click on the **Forgot Password?** link found under the Login button.

The retrieve password screen is displayed.

Figure 6: Forgot Password Screen

2. Type your User Name in the **User Name** field.

3. Type your registered e-mail address in the **Email Address** field.

4. Click on the **Email Password** button.

A confirmation screen will be displayed and the system will e-mail you a temporary password to the e-mail address you provided.

To reset your password using the secret questions and answers feature:

5. Type your User Name in the **User Name** field

6. Type your registered e-mail address in the **Email Address** field.
7. Click on the **Reset Password** button

The Secret Questions screen appears.

Figure 7: Secret Questions Screen

8. Enter the answers corresponding to the questions you selected for Resetting your Password
9. Click the **Submit** button.

The Reset Password screen appears

Figure 8: Reset Password Screen

10. Enter your new password and confirm the password.
11. Click the **Submit** button.

If the question and answer combinations provided match what is on file, your password will be reset to the new password entered.

Changing Your Password

1. Select the **Change Password** link from the upper-right navigation bar.

Figure 9: Change Password Link

2. The Rules of Behavior page will be displayed. This page is used to ensure that you understand the rules of behavior involved with interacting with a government computer system. You are required to read and accept the rules of behavior before continuing through to change your password. Click the **"I have read and accept the Rules of Behavior"** checkbox, and click the **Accept** button (pictured below).

Figure 10: Rules of Behavior Screen

The Change Password screen is displayed.

3. Enter your Old/Temporary Password, your New Password, and Confirm your New Password.

NOTE: Password length must be between 6 and 20 characters. The password must contain at least one alphabetic and one numeric character. Passwords are not case sensitive. You cannot reuse the last three passwords you have used. Passwords expire every 365 days. Passwords for users with Financial Functions permissions expire.

Figure 11: Change Password Screen

4. Click the **Submit** button.

A confirmation screen is displayed indicating you have successfully changed your password. You may select the **Applicant Home Page** link to return to your Application task list. Password length must be between 6 and 20 characters. The password must contain at least one alphabetic and one numeric character. Passwords are not case sensitive. You cannot reuse the last three passwords you have used. Passwords expire every 365 days.

Retrieving Your User Name

If you have forgotten your user name you have two options for retrieving your username:

1. The system can e-mail your user name to the e-mail address provided at account creation.

2. If your e-mail address has changed since account creation, you can retrieve your user name by confirming the answer to one secret question.

To have the system e-mail you your user name:

3. Click on the **Forgot Username?** link found under the Login button.

The retrieve username screen is displayed.

Figure 12: Forgot User Name Screen

4. Type your Last Name in the **Last Name** field.

5. Type your First Name in the **First Name** field.

6. Type your registered e-mail address in the **Email Address** field.

7. Type the First Line of your Registered Street Address in the **First Line of Street Address** field.

8. Click on the **Email Username** button.

A confirmation screen will be displayed and the system will e-mail you your User Name.

To retrieve your user name using the secret questions and answers feature:

9. Enter the information in steps 4-7 above.

10. Click on the **Retrieve Username** button

The Secret Questions screen appears.

Figure 13: Secret Questions Screen

11. Enter the answer corresponding to the question you selected for Retrieving your User Name.

12. Click the **Submit** button.

If the question and answer combination match what is on file, your User Name appears

Figure 14: Retrieve User Name Screen

Logging Out

Once you have logged into the GRFP application, a **Logout** link is available in the upper-right navigation bar.

Figure 15: Logout Link

To exit the application at any time, click the **Logout** link. The web browser returns to the GRFP login page.

Understanding Your Application Package Task List

Your application package task list provides links to resources that allow you to prepare and manage your application. The task list is divided into two parts: Application Package Task List and Application Package Optional Task List. The application and the option to View/Print Application is located under the Application Package Task List. Additional resources that you may need to manage your application package are located under the Application Package Optional Task List.

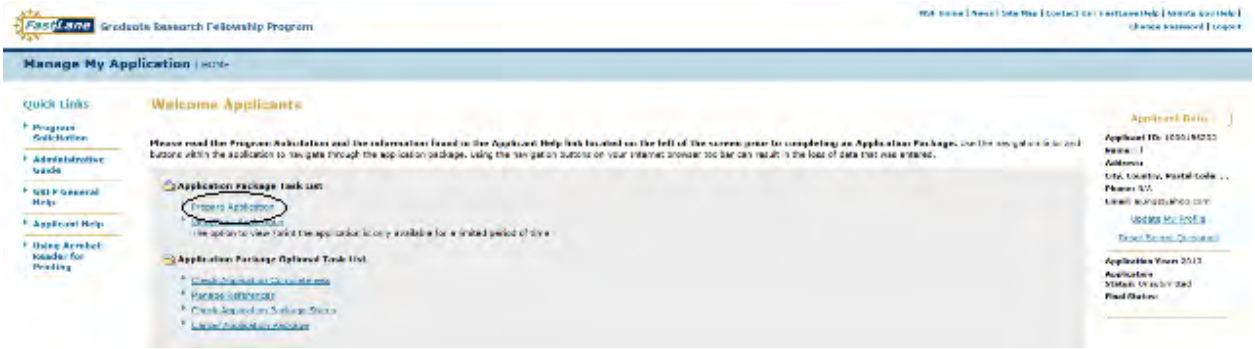


Figure 16: Application Package Task List Screen

The list below describes the various tasks to prepare and manage your application.

Feature	Description
Prepare Application	The Prepare Application task is a required task that needs to be completed and submitted for award consideration. It is available once the user has registered and logs in with a valid username and password. The link will be removed either when the application has been submitted or when the submission deadline has passed, whichever comes first.
Check Application Completeness	The Check Application Completeness task is an optional task that can be performed at any time while preparing your application to display the readiness of your application for submission. When you perform this task to check your application, the system returns a list of both required and optional fields that have not been completed and the section of the application that the field is contained.
View/ Print Application	The View/Print Application task is a required task that displays a printable Adobe PDF version of the application for you to view and/or print. This feature is available for a limited time during the application period and it is highly recommended that applicants save or print a copy of their application.
Manage References	The Manage References task is an optional task that allows you to manage your references. You may add references for your application package even after you have submitted your application using this task link. When you add a reference name to the system and click "send e-mail", an e-mail is sent to the reference person with the reference request. The e-mail will contain a link that the reference person can use to access and submit his/her reference letter.

Check Application Package Status	The Check Application Package Status task is an optional task that allows you to check the status of each of the elements of your Applications (GRFP Application, and References).
Cancel Application Package	The Cancel Application Package task is an optional task that allows you to cancel your application package before submitting it to the NSF. Once an application is canceled, it cannot be edited or submitted to NSF for review.

Understanding Your Applicant Data and Application Status

Your applicant data area details your current user profile information and your current application status. The applicant data area also contains a link to allow you to update your profile information and secret questions. The list below describes each feature in your applicant data area.

Feature	Description
Applicant ID	The Applicant ID is the number assigned to you when you become an applicant through the self-application process.
User Profile (Name, ORCID, Address, Phone, and Email)	The User Profile area contains your current name, Open Researcher and Contributor ID (ORCID), mailing address, phone number, and e-mail address. This contact information is used for all correspondence that is sent to you through the GRFP system and by the NSF GRFP office. It is very important that you keep this information up-to-date.
Update My Profile	The Update My Profile link allows you to update your personal profile information including, name, mailing contact information, and permanent contact information.
Secret Questions	The Reset Secret Questions screen allows you to select from a series of Questions and provide answers to allow for resetting your Password or retrieving your Username at a later date should the need arise.
Application Year	The Application Year refers to the year in which your fellowship application is being submitted.
Status	Indicates the current status of your application: Submitted, Unsubmitted, or Withdrawn.
Final Status	Indicates the final status of your application: Submitted or Withdrawn.

Prepare Application

Prepare Application

Once you have registered and chosen a username and password, the **Prepare Application** link will be available in your Application Package Task List. Click on this link to begin a new application or continue with an existing application that has not yet been submitted. The task link will remain until you have either submitted the application or the deadline for application submission has passed, whichever comes first.

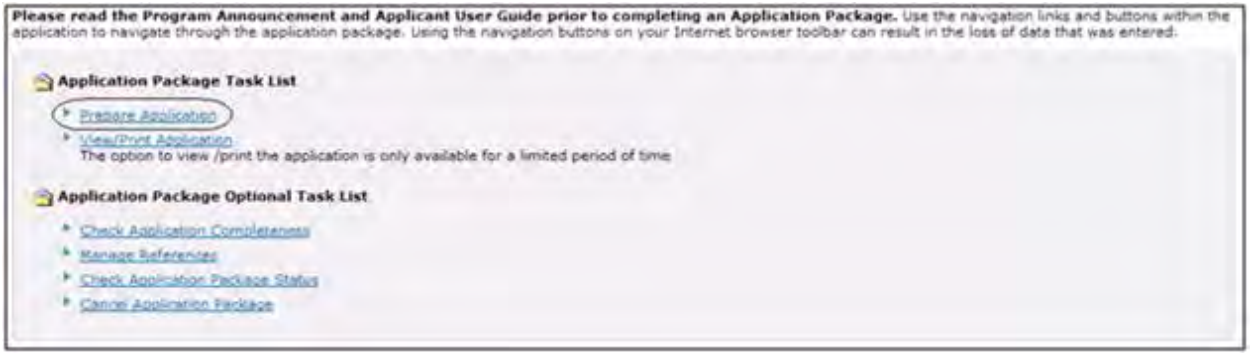


Figure 17: Prepare Application Link

The GRFP application is divided into sections with separate headings. Instructions are provided for completing each section. The required fields are indicated by an asterisk (*). Before you start this application please read the Application Preparation Instructions in the Program Solicitation.

- You may complete the sections in any order that you choose. Navigate through the application using the links in the title for each section.

- You may save your application information as you go and complete it at a later time. Click “Save and Continue’ to save your data and advance to the next step. Caution: Using the buttons on your Internet browser toolbar can result in the loss of data.

- You can submit your application by clicking “Continue” in the SUBMIT APPLICATION section. The system will verify that you have provided the required information to submit your application. Please review the certifications before you start. You will not be able to submit an application without making these certifications. Five certifications must be made before the National Science Foundation can authorize funds for a fellowship award. These concern 1) controlled substances; 2) delinquency on Federal debt; 3) debarment and suspension; 4) eligibility criteria; and 5) originality of the application.

- You can check for application completeness at any time while preparing your application by clicking the “**Check Application Completeness”** link on the right of this page. **We recommend you save an electronic copy of your completed application for your records**, as the application will not be available to you after decisions are made. Applications are not carried forward for resubmission in later years.

NOTE: The first time you select the Prepare Application link you will be required to read the certifications required for application submission and acknowledge that you have read and understand the certifications and provide an e-signature

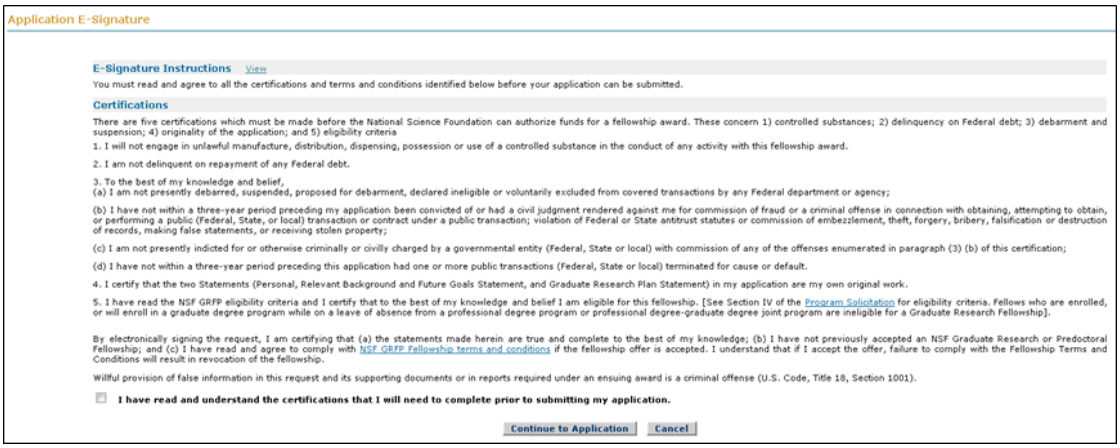


Figure 18: E-Signature

Personal Information

The Personal Profile section of the application package contains fields for applicants to enter general profile information such as name, contact information, and demographic information.

To Submit Personal Profile Information:

1. Click the **Personal Information** link on the Prepare Application Package screen.

The Personal Information screen is displayed.

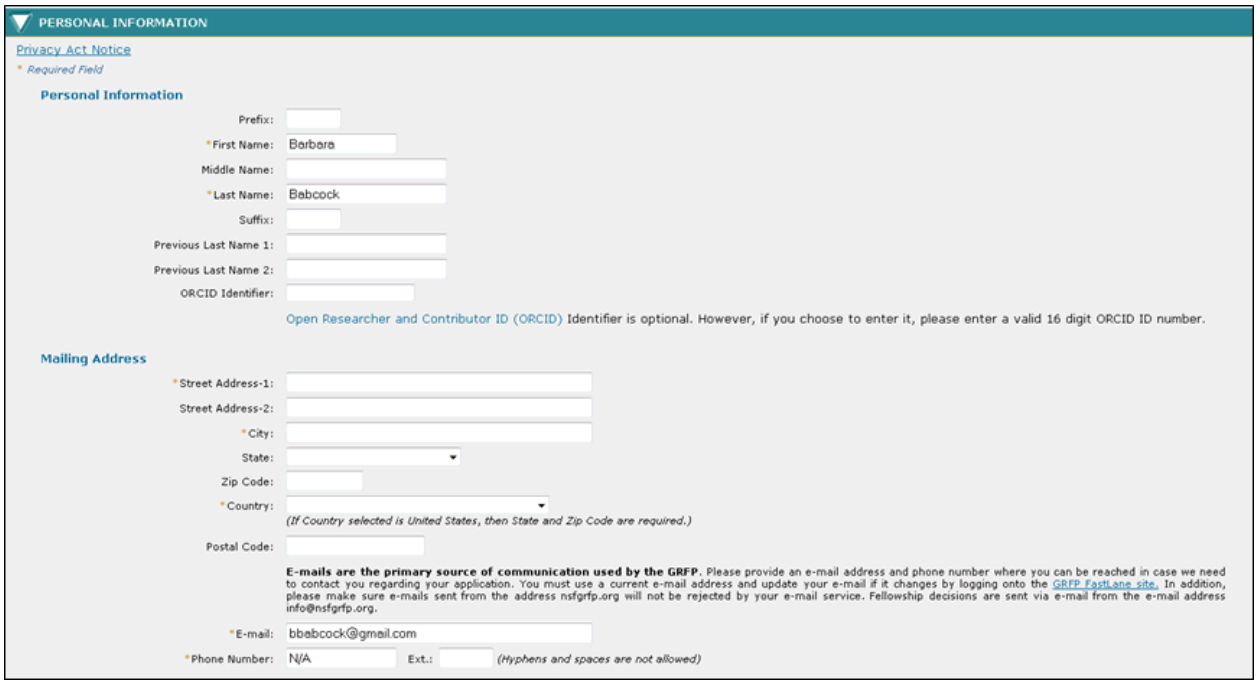


Figure 19: Personal Information Section

2. Enter your personal profile information. The table below describes all the fields in the Personal Profile Section.

Feature	Description
First Name	Type your first name (required).
Prefix	Type your prefix.
Middle Name	Type your middle name.
Suffix	Type your suffix, if applicable.
Last Name	Type your last name (required).
Previous Last Name 1	Type your previous last name 1, if applicable.
Previous Last Name 2	Type your previous last name 2, if applicable.
ORCID Identifier	Type your 16-digit ORCID identifier, if registered
Mailing Address	Type your mailing address (required). You are responsible for updating FastLane immediately in the event of an address change.
Mailing E-mail	Type your primary e-mail address.
Mailing Phone Number	Type your primary phone number.
Mailing Ext	Type your primary phone number extension.
Same as Mailing Address	Check this box if your permanent address is the same as your mailing address.
Permanent Address	Type your permanent address if it is different from your mailing address.
Permanent E-mail	Type your secondary e-mail address.
Permanent Phone Number	Type your secondary phone number.
Permanent Ext	Type your secondary phone number extension.
Date of Birth	Type the month (MM), day (DD), and year (YYYY) of your birth The National Science Foundation requests Date of Birth for the sole purpose of contacting applicants in the future for program-level evaluations. Date of Birth information is not disclosed to reviewers.
Date of Birth State	Type the state in which you were born.
Date of Birth Country	Select the country where you were born.

Citizenship	Select your citizenship status. All applicants must be citizens or nationals of the United States, or permanent resident aliens of the United States at the time of the final application deadline date (required).
Permanent Resident Date	If you are a permanent resident, type the date your permanent resident status was granted (MM/DD/YYYY format). If your permanent resident date is after the final application deadline date, your application will be invalid and will not be accepted (Required if “Permanent resident aof the United States” is selected.)
High School City	Type the city where you attended high school.
High School State	Type the state where you attended high school (if in the US).
High School Country	Type the country where you attended high school.
Gender	Select your gender or select “Do Not Wish to Provide” (required).
Veteran Status	Select Yes, No or Do Not Wish to Provide to indicate your veterans status.
Race	Select your race or select “Do not wish to provide race”. You may select one or more fields. To obtain the definition of Race, click the Race and Ethnicity Definitions link (required).
Ethnicity	Select your ethnicity or select “Do not wish to provide ethnicity”. To obtain the definition of Ethnicity, click the Race and Ethnicity Definitions link (required).
Disability	Select if you have a disability or select “Do not wish to provide handicap status”. You may select one or more fields (required). If your disability is not in the list, select “Other Disability”. Once you select “Other Disability”, type a description of your disability. Your description must be less than 255 characters.

WARNING: You must provide data for all required fields (indicated by an asterisk on the screen) before your personal profile information is saved. If you exit the Application Module before you have completed and submitted the personal profile, you will need to re-enter the data you previously entered.

NOTE: You may select one or more fields when selecting race and disability.

3. Click the **Save and Continue** button.

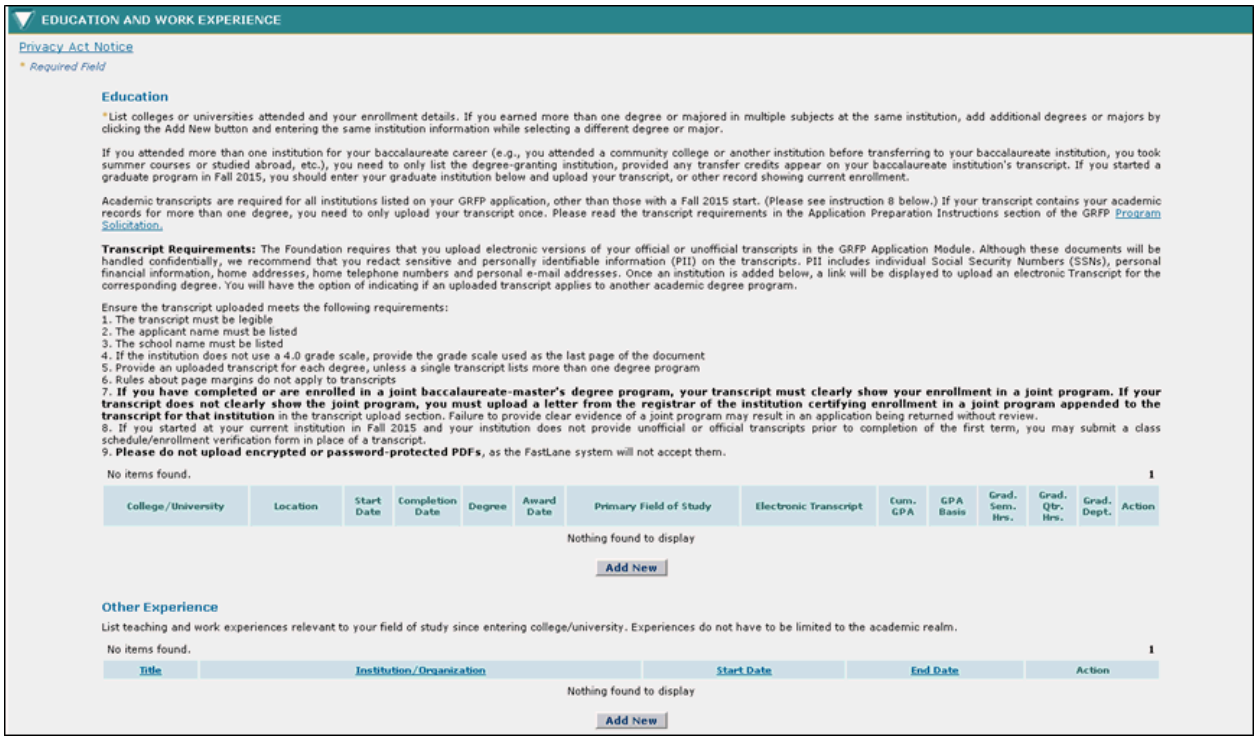
Your Personal Profile information is saved and the Education and Work Experience screen is displayed.

Education and Work Experience

The Education and Work Experience section allows the applicant to enter the following information: Education, Electronic Transcripts, Other Experience, and Additional Graduate School Information.

To Submit Education and Work Experience Information:

1. Click the **Education and Work Experience** link on the Prepare Application screen. The Education and Work Experience screen is displayed.



EDUCATION AND WORK EXPERIENCE

Privacy Act Notice

* Required Field

Education

*List colleges or universities attended and your enrollment details. If you earned more than one degree or majored in multiple subjects at the same institution, add additional degrees or majors by clicking the Add New button and entering the same institution information while selecting a different degree or major.

If you attended more than one institution for your baccalaureate career (e.g., you attended a community college or another institution before transferring to your baccalaureate institution, you took summer courses or studied abroad, etc.), you need to only list the degree-granting institution, provided any transfer credits appear on your baccalaureate institution's transcript. If you started a graduate program in Fall 2015, you should enter your graduate institution below and upload your transcript, or other record showing current enrollment.

Academic transcripts are required for all institutions listed on your GRFP application, other than those with a Fall 2015 start. (Please see instruction 8 below.) If your transcript contains your academic records for more than one degree, you need to only upload your transcript once. Please read the transcript requirements in the Application Preparation Instructions section of the GRFP Program Solicitation.

Transcript Requirements: The Foundation requires that you upload electronic versions of your official or unofficial transcripts in the GRFP Application Module. Although these documents will be handled confidentially, we recommend that you redact sensitive and personally identifiable information (PII) on the transcripts. PII includes individual Social Security Numbers (SSNs), personal financial information, home addresses, home telephone numbers and personal e-mail addresses. Once an institution is added below, a link will be displayed to upload an electronic Transcript for the corresponding degree. You will have the option of indicating if an uploaded transcript applies to another academic degree program.

Ensure the transcript uploaded meets the following requirements:
1. The transcript must be legible
2. The applicant name must be listed
3. The school name must be listed
4. If the institution does not use a 4.0 grade scale, provide the grade scale used as the last page of the document
5. Provide an uploaded transcript for each degree, unless a single transcript lists more than one degree program
6. Rules about page margins do not apply to transcripts
7. **If you have completed or are enrolled in a joint baccalaureate-master's degree program, your transcript must clearly show your enrollment in a joint program. If your transcript does not clearly show the joint program, you must upload a letter from the registrar of the institution certifying enrollment in a joint program appended to the transcript for that institution** in the transcript upload section. Failure to provide clear evidence of a joint program may result in an application being returned without review.
8. If you started at your current institution in Fall 2015 and your institution does not provide unofficial or official transcripts prior to completion of the first term, you may submit a class schedule/enrollment verification form in place of a transcript.
9. **Please do not upload encrypted or password-protected PDFs**, as the FastLane system will not accept them.

No items found. 1

College/University	Location	Start Date	Completion Date	Degree	Award Date	Primary Field of Study	Electronic Transcript	Cum. GPA	GPA Basis	Grad. Sem. Hrs.	Grad. Qtr. Hrs.	Grad. Dept.	Action
Nothing found to display													

Add New

Other Experience

List teaching and work experiences relevant to your field of study since entering college/university. Experiences do not have to be limited to the academic realm.

No items found. 1

Title	Institution/Organization	Start Date	End Date	Action
Nothing found to display				

Add New

Figure 20: Education and Work Experience Section

Education

2. List colleges or universities attended and your enrollment details. If you earned more than one degree or majored in multiple subjects at the same institution, add additional degrees or majors by clicking the Add New button and entering the same institution information while selecting a different degree or major. If you attended more than one institution for your baccalaureate career (e.g., you attended a community college or another institution before transferring to your baccalaureate institution, you took summer courses or studied abroad, etc.), you need to only list the degree-granting institution, provided any transfer credits appear on your baccalaureate institution's transcript. If you have just started a graduate program this fall, you should enter your graduate institution below and upload your transcript/record showing current enrollment. You must list all graduate institutions that you have attended. Academic transcripts are required for all institutions listed on your GRFP application, other than those starting in fall of this year. (Please see instruction 8 below.) If your transcript contains your academic records for more than one degree, you need to only upload your transcript once. Please read the transcript requirements in the Application Preparation Instructions section of the GRFP Program Solicitation.

Transcript Requirements: The Foundation requires that you upload electronic versions of your official or unofficial transcripts in the GRFP Application Module. Although these documents will be handled confidentially, we recommend that you redact sensitive and personally identifiable information (PII) on the transcripts. PII includes individual Social Security Numbers (SSNs), personal financial information, home addresses, home telephone numbers and personal e-mail addresses. Once an institution is added below, a link will be displayed to upload an electronic Transcript for the corresponding degree. You will have the option of indicating if an uploaded transcript applies to another academic degree program.

Ensure the transcript uploaded meets the following requirements:

1. The transcript must be legible

2. The applicant name must be listed

3. The school name must be listed

4. If the institution does not use a 4.0 grade scale, provide the grade scale used as the last page of the document

5. Provide an uploaded transcript for each degree, unless a single transcript lists more than one degree program

6. Rules about page margins do not apply to transcripts

7. **If you have completed or are enrolled in a joint baccalaureate-master's degree program, your transcript must clearly show your enrollment in a joint program. If your transcript does not clearly show the joint program, you must upload a letter from the registrar of the institution certifying enrollment in a joint program appended to the transcript for that institution** in the transcript upload section. Failure to provide clear evidence of a joint program may result in an application being returned without review.

8. If you started at your current institution this fall and your institution does not provide unofficial or official transcripts prior to completion of the first term, you may submit a class schedule/enrollment verification form in place of a transcript.

9. **Please do not upload encrypted or password-protected PDFs**, as the FastLane system will not accept them.

To Add a College or University:

a. Click the **Add New** button (see Figure 20)

The Add College/University screen is displayed.

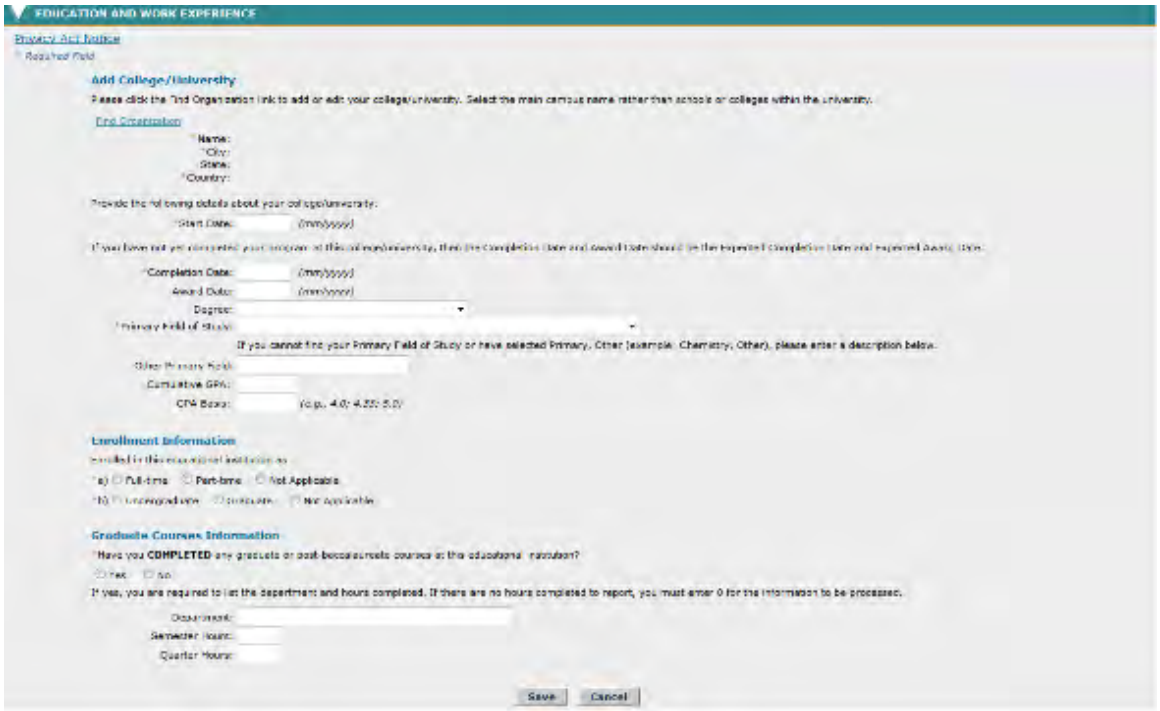


Figure 21: Add College/University Screen

b. Enter your college or universities information. The table below describes all the fields.

Feature	Description

College/University	Select your College or University using the Find Organization link. Once you have selected this link, you will be permitted to type in the name of the College or University and click the search button. Once the search results displays your College or University, click the select link (required). If you were unable to find your college or university, you are able to enter it in manually by clicking on the enter it manually link and entering the following information: Name City State Country :USA Once you have entered the information click the submit link.
Start Date	Type the date (MM/YYYY format) of when you began your studies (required).
Completion Date	Type the date (MM/YYYY format) of when you completed your studies, or when you plan to complete your studies (required).
Award date	Type the date (MM/YYYY format) you received a degree or when you plan to receive your degree.
Degree	Select the degree type you received.
Primary Field of Study	Select your previous major field of study. If you cannot find your major field of study from the list, type your major field of study in the input box (required).
Other Primary Field	Enter a description of your Major Field, if you cannot find your Major Field in the list or have selected Major, Other (example: Chemistry - Other (specify)) (required if major field contains “Other (specify)”).
Cumulative GPA	Enter your cumulative Grade Point Average (GPA) attained while at this university. If this is your first semester at the university, and you do not yet have a GPA at this university, leave this field blank.
GPA Basis	Enter the basis or scale that your cumulative Grade Point Average is based upon (e.g., 4.0; 4.33; 5.0). If this is your first semester at the university, and you do not yet have a GPA at this university, leave this field blank.
Enrollment Information	Select your enrollment status at the college or university (required).

Graduate Course Information	Select whether you have completed any post-baccalaureate or graduate courses at this institution (required).
Department	Type the name of the graduate department. (Required if you selected “Yes” for the Graduate Course Information question)
Semester Hours	Type the semester hours earned, enter zero if you do not have any to report. (Required if you selected “Yes” for the Graduate Course Information question). For information regarding semester hours, please visit the GRFP FAQ’s located in your Quick Links.
Quarter Hours	Type the semester hours earned, enter zero if you do not have any to report. (Required if you selected “Yes” for the Graduate Course Information question). For information regarding quarter hours, please visit the GRFP FAQ’s located in your Quick Links.

c. Click the **Save** button.

The Education screen is displayed and the college or university information entered is displayed in the list.

a. Upload your Electronic Transcript

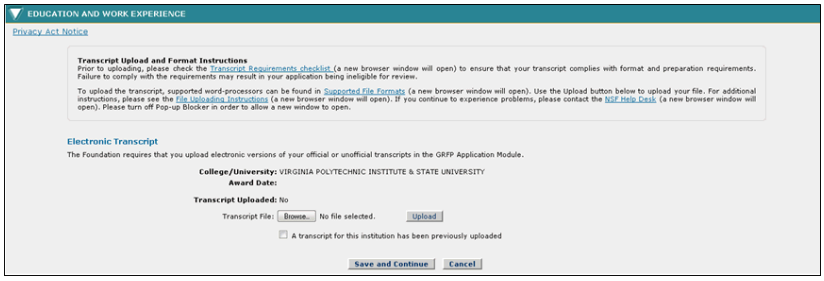


Figure 22: Add Electronic Transcript

To Upload your Electronic Transcript:

b. Click on the upload link next to the College/University information on the Education screen, under the Electronic Transcript column.

c. The system navigates to the Electronic Transcript page.

d. Either type the file location of your transcript in the input box or click the Browse button to find the location. **If a transcript for this Institution already exists select the check box indicating a transcript has already been uploaded** (see figure 22).

e. Click the Upload button to upload your transcript.

f. The uploaded file is converted to the PDF format, and the User is given the option to proof read the uploaded file with a message 'Proof Read PDF'

g. The system displays 'Accept' 'Cancel' buttons and the uploaded file in PDF format in a different Screen.

h. The system also displays the text "To delete the uploaded document, click the "Delete" link. To replace a previously-uploaded document with a new document, delete the previously-uploaded document, then you will get an upload option.

i. Click on the Accept button to accept the PDF and return to the transcript screen.

j. The PDF file is uploaded to the system and The system displays the view transcript screen with the Document Uploaded as 'Yes' and displays a PDF Link to the transcript.

k. Click the Continue button to return to the Education and Work Experience Page.

NOTE: To ensure that your transcript complies with format and preparation requirements, reference the Transcript Requirements checklist.

NOTE: For information on FastLane Acceptable File Formats, click here.

TIP: **E-mails are the primary source of communication used by the GRFP Program.** In the event we need to contact you regarding your application, please provide an e-mail address and phone number where you can be reached. It is important for you to use a current e-mail address and to update the e-mail address if it changes. In addition, please make sure e-mails sent from the address nsfgrfp.org will not be rejected by your e-mail service. Fellowship decisions and access to application reviews are sent via e-mail.

Other Experience

1. List teaching and work experiences relevant to your field of study since entering college/university. Experiences do not have to be limited to the academic realm..

To Add a Fellowship, Scholarship, Teaching, or Work Experience:

a. Click the **Add New** button.

The Adding Education and Work Experience screen is displayed.

Figure 23: Adding Education and Work Experience Screen

b. Enter the details of the position. The table below describes all of the fields.

Feature	Description
Title	Type your position held at time of experience (required).
Institution/Organization	Type the name of the institution/organization (required).
Start Date	Type the date (MM/YYYY format) you began the fellowship, scholarship, teaching, or work experience (required).
End Date	Type the date (MM/YYYY format) you completed the fellowship, scholarship, teaching, or work experience. If the experience is ongoing, leave this field blank.

2. Click the **Save** button.

The Education and Work Experience screen is displayed and the Fellowship, Scholarship, Teaching, or Work Experience information entered is displayed in the list.

3. Enter your significant academic honors, publications and presentations.

Additional Graduate School Information

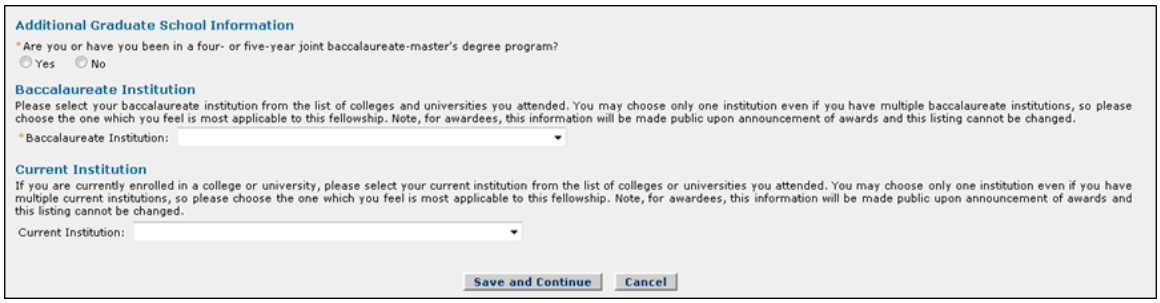


Figure 24: Additional Graduate School Information

1. Answer the additional graduate school information question. Select **"Yes"** or "**No"** to indicate if you are or have been enrolled in a five-year or four-year joint baccalaureate-master's degree program (required).

2. Please select your baccalaureate institution from the list of colleges and universities you attended. You may only choose one institution even if you have multiple baccalaureate institutions, so please choose the one which you feel is most applicable to this fellowship. Note, for awardees, this information will be made public upon announcement of awards and this listing cannot be changed.

3. Select your current institution from the list of colleges and universities you attended (if applicable). If you are currently enrolled in a college or university, please select your current institution from the list of colleges or universities you attended. You may choose only one institution even if you have multiple current institutions, so please choose the one which you feel is most applicable to this fellowship. Note, for awardees, this information will be made public upon announcement of awards and this listing cannot be changed.

4. Click the **Save and Continue** button.

Your Education and Work Experience information is saved and the Proposed Graduate Program screen is displayed.

NOTE: When changes are made to your College/University list, the baccalaureate institution and current institution fields are deselected so that you must re-select the baccalaureate institution and current institution from the most recent college/university lists.

Proposed Field of Study

Please indicate the Primary Field of Study that most closely reflects the overall field of the proposed graduate program. Applicants are reviewed in panels based on their selection of a primary Field of Study. **Your selection of a primary Field of Study determines the application deadline you must adhere to and the panel that will review your application. Applications will not be transferred to another panel.** Panels will review applications from **broad areas** of related disciplines. A list of disciplinary panels and preliminary assignments of fields of study can be viewed here. Please select your Primary Field of Study

(it does not have to be an exact match) from the drop-down menu below. If an appropriate field is not listed, you may select “Other” in the appropriate Primary Field of Study. **Note: The "Other" field of study category should only be selected if the proposed field of study is not covered by one of the fields, and should not be used to designate a field of study that is more specific than the fields listed.**

Changing fields of study as Graduate Research Fellows: If awarded a fellowship, Fellows are allowed some leeway in changing their graduate study and proposed institution. It is acceptable for Fellows to shift the focus of their research while remaining in the same field. However, Fellows are expected to pursue graduate study in the general field designated on their application. Changing fields of study during the first year of the fellowship is generally not permitted. All changes of field must comply with the eligibility requirements in the Program Solicitation.

To Submit Proposed Field of Study:

1. Click the **Proposed Field of Study** link on the Prepare Application screen.

The Proposed Field of Study screen is comprised of three sections..

Fields of Study

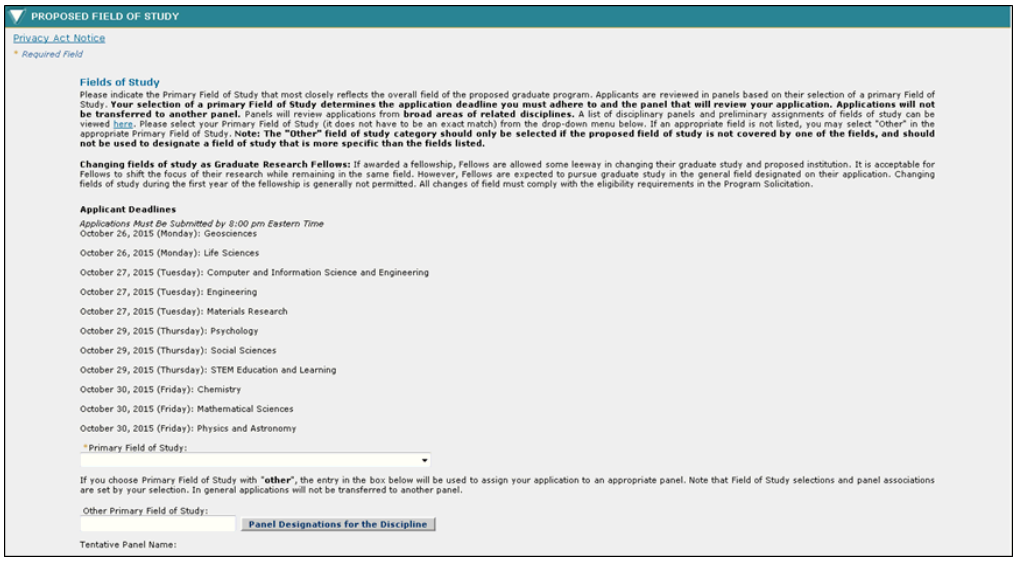


Figure 25: Fields of Study Section under Proposed Fields of Study

1. Provide the following details about your fields of study.

Feature	Description
Primary Field of Study	Select your proposed primary field of study (required) from the dropdown list.

Other Primary Field of Study	Select your Other Primary Field of Study
Panel Designations for the Discipline	Selecting this feature provides you with a list of prior year's primary fields of study and their assignments to the review panels for the discipline you have selected as your proposed primary major discipline. Please select one of the panel groupings. NSF will review your selection of panel grouping and the text entered along with other factors, to determine how to assign your application to review panels. If you choose "**Other Primary Field of Study**," the entry in will be used to assign your application to an appropriate panel. Note that Field of Study selections and panel associations are set by your selection. In general applications will not be transferred to another panel.

NOTE: A list of Panel Designations by field code is provided for reference in selecting your field of study. This list is provided to help you select a primary field of study that best represents your application, not as a way for you to designate your review panel assignment. Along with other factors, primary field of study is a factor used by NSF to determine how to assign applications to review panels.

Interdisciplinary Information

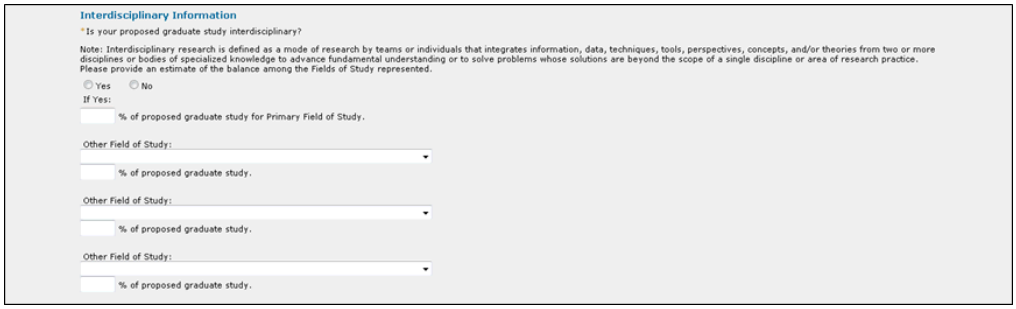


Figure 26: Interdisciplinary Information under Proposed Field of Study

1. Provide the following details for the Interdisciplinary Information section.

Feature	Description
Proposed Graduate Program Interdisciplinary	Select "Yes" or "No" to indicate whether your proposed graduate program is interdisciplinary (required).
Primary Field of Study	Type in the % of the program of the primary field of study. (Required if your planned proposed graduate program was multi disciplinary.)

Other Field of Study	Select your Other Field of Study from the dropdown list.
Other Field of Study % of Program	Type in the % of the program of the other field of study.

Highest Level of Degree

Figure 27: Highest Level of Degree under Proposed Field of Study

1. Enter your Highest Level of Degree and Field of Study.

Feature	Description
Degree	Select the highest level degree toward which you expect to work on while on your fellowship tenure.. If the degree is not listed, enter the degree in the field provided.

Proposed Graduate Study

The Proposed Graduate Study section allows the applicant to enter information about the proposed University or College and field of study for graduate work.

To Submit Proposed Graduate Program Information:

1. Click the **Proposed Graduate Study** link on the Prepare Application screen.

The Proposed Graduate Program screen is displayed.

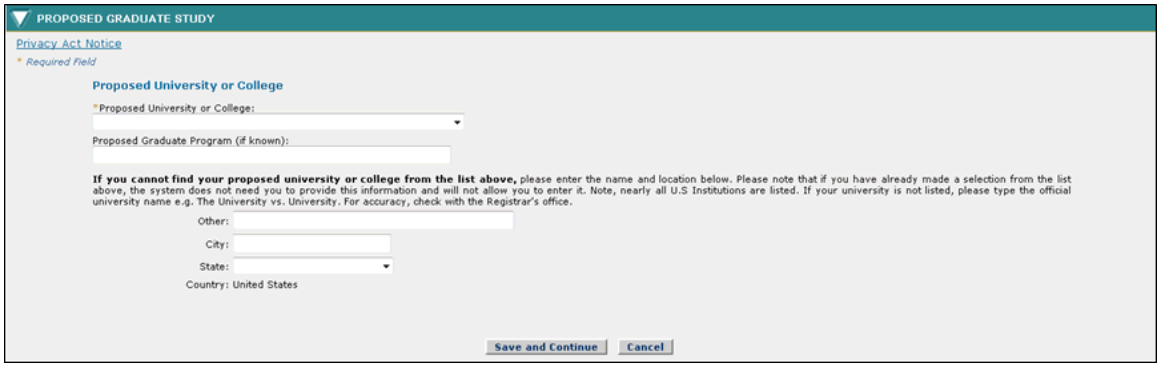


Figure 28: Proposed Graduate Study Section

Proposed University or College

1. Provide the following details about your proposed university or college.

Feature	Description
Proposed University or College	Select your Proposed University or College from the dropdown list. If your University or College is not listed, enter the University or College's name in the "Other" field.
Proposed Program	Enter the title of the Proposed Program you plan to enroll at the Proposed University or College.
Other	Type the name of your Proposed University or College (Use this field only if it is not in the drop down list.).
City	Type the city where your Proposed University or College is located (Use this field only if it is not in the drop down list.).
State	Select the state where your Proposed University or College is located from the dropdown list. Required if the country of your Proposed University or College is the United States (Use this field only if it is not in the drop down list.).
Country	USA only

References

The References section allows the applicant to enter information for individuals that they would like to submit reference letters for their Fellowship application. You are required to submit at least three references, but no more than five in order to submit the application. Scientists or faculty members who have current knowledge of your academic and/or professional experience and ability should be selected as references, since they will be able to give meaningful answers to the questions asked. NSF suggests that at least two of the three references should be persons with whom you have worked in your present (or most recent) department, including the thesis adviser, if applicable. The References should be prioritized from 1 to 5 (1 being the highest priority), in the order they are to be included in the application. In the event of missing letters in the first three slots, the optional fourth and fifth letters will be used in your ranked order to complete the application. No more than three letters, in order of priority, will be reviewed with an eligible application. This ranking is for application management purposes only and is not disclosed to reference letter writers and reviewers. The application will not allow two references to hold the same rank at any time. **You may change rankings at any time prior to the reference letter deadline by**

using the Change Reference Writer Ranking button below. If you have questions regarding the references requirements, please refer to the GRFP FAQs link found on your applicant home page in the Quick Links.

After adding each reference, please click the **'Send E-mail'** link in order to notify the person of your request for a reference letter. The individual will receive an e-mail that contains instructions on how to submit a reference letter for your Fellowship application. Please remember that the system will not send any e-mail notification to references on its own; your action of **clicking the 'Send E-mail' link is required**.

Three reference letters must be received by the reference writer deadline in order for your application to be complete and eligible for review.

NOTE: If you change or update any of the reference information after you have sent the request e-mail using the "Send E-mail" link, you must resend the e-mail to the reference writer via the same link. If you chose to delete a reference writer from your list after you have sent them a request to write a reference, please remember to notify the reference writer that they are no longer asked to write on your behalf. The system will not send this e-mail notification on its own; your action of notifying a deleted reference writer is required.

You are advised to monitor the receipt of your reference letters using the Check Application Package Status feature on the Application Package Optional Task List.

NOTE: Only the NSF Reference Report Format will be accepted. The student reference statements on file at colleges and universities will not be accepted in lieu of the NSF Reference Letter.

To Submit Reference Information:

1. Click the References link on the Prepare Application screen.

The References screen is displayed.

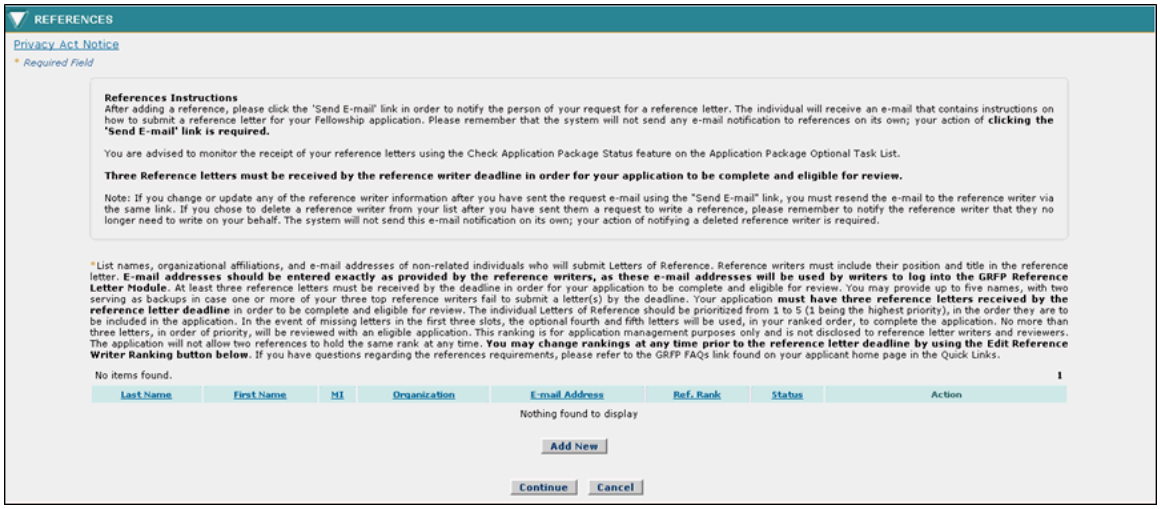


Figure 29: References Section

2. Enter your reference information.

To Add your Reference Information:

a. Click the **Add New** button.

b. Enter your reference information. The table below describes all the fields.

Feature	Description
Last Name	Type the last name of the Reference person (required).
First Name	Type the first name of the Reference person (required).
Middle Initial	Type the middle initial of the Reference person.
Organization	Type the name of the organization (university, college, institution) for the Reference person (required).
E-mail Address	Type the Reference person's e-mail address (required).
Confirm E-mail Address	Re-Type the Reference person's e-mail address (required)
Rank	Designate rank of reference writer between 1-5

c. Click the **Save** button.

The Reference screen is displayed and the reference information entered is displayed in the list. The Status field shows either "Submitted" or "Unsubmitted" indicating whether the reference writer has submitted the letter of reference.

NOTE: Make sure you click on the "Send E-mail" button for each reference you identify to actually send the e-mail request to the person. If you update any of the reference information after you have sent the request e-mail using the

"Send E-mail" link, you must resend the e-mail to the person of your request via the same link.

To Change Your Reference Writer Ranking:

1. Click the **Edit Reference Writer Ranking** button on the References Screen

2. Edit the Reference Ranking(s) in the Ref. Rank Column

3. Select Save

The updated reference writer rankings will be reflected on the References screen

Statement Preparation and Format Instructions

a. All statements should be written **using standard 8.5" x 11" page size, 12-point, Times New Roman font or 12-point, Computer Modern font, 1" margins on all sides, and must be single spaced or greater. Only publications and presentation citations may be a smaller font, no less than 10 point, Times New Roman or 10-point, Computer Modern.** Small type size makes it difficult for reviewers to read the application; consequently, the use of small type not in compliance with the application guidelines may be grounds for NSF to return the application without review.

b. There is a **3-page** limit for the **Personal, Relevant Background and Future Goals Statements and a 2-page limit for the Graduate Research Statement.** References and citations are included toward the page limits.

c. Character spacing should use normal (100%) single-line space option. Do not condense line spacing or reduce the character spacing scale. Adherence to type size, character spacing, and page length is necessary to ensure that no applicant will have an unfair advantage, by using smaller type or line spacing to provide more text in the application.

d. Images may be included in your statement, however do not rely on color as panelists may view these in black and white. All images, footnotes, endnotes, and other citations are included in the 2-page limit.

e. Prepare your response using a word-processor.

Personal, Relevant Background and Future Goals Statement

The Personal, Relevant Background and Future Goals Statement section allows the applicant to upload a statement that describes his personal, professional, and educational experiences and future educational, professional development and career goals.

To Submit Personal, Relevant Background and Future Goals Statement:

1. Click the **Personal, Relevant Background and Future Goals Statement** link on the Prepare Application screen.

The Personal, Relevant Background and Future Goals Statement screen is displayed.

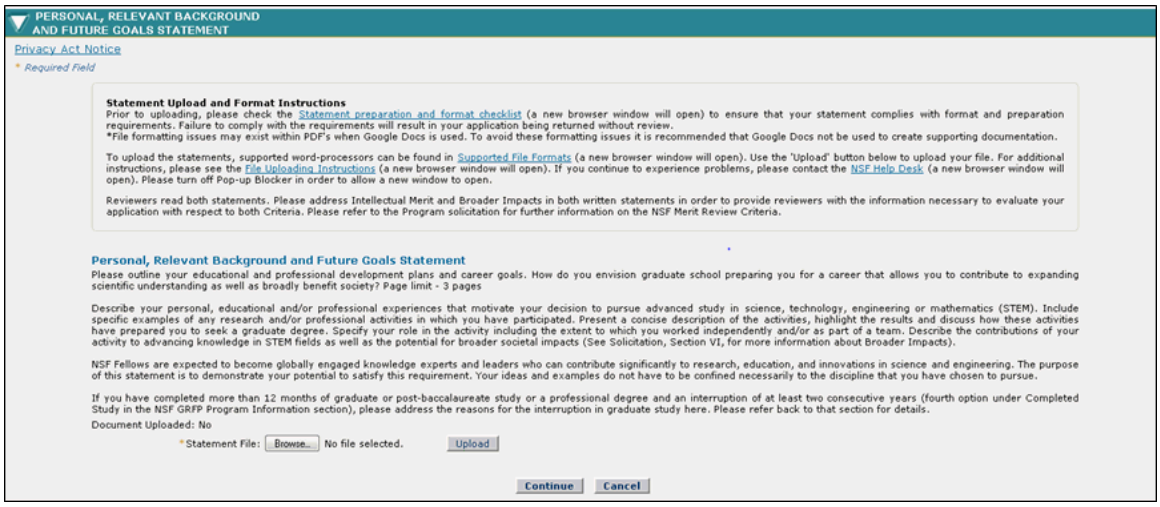


Figure 30: Personal, Relevant Background and Future Goals Statement Screen

NOTE: Before attempting to submit your statement for the Graduate Research Fellowship Application, it is important to make sure that java script is allowed within your browser, and that popup blockers are disabled. To view browser specific instructions on how to do this, please see section 13.

1. Please outline your educational and professional development plans and career goals. How do you envision graduate school preparing you for a career that allows you to contribute to expanding scientific understanding as well as broadly benefit society? Page limit – 3 pages

   Describe your personal, educational and/or professional experiences that motivate your decision to pursue advanced study in science, technology, engineering or mathematics (STEM). Include specific examples of any research and/or professional activities in which you have participated. Present a concise description of the activities, highlight the results and discuss how these activities
   have prepared you to seek a graduate degree. Specify your role in the activity including the extent to which you worked independently and/or as part of a team. Describe the contributions of your activity to advancing knowledge in STEM fields as well as the potential for broader societal impacts (See Solicitation, Section VI, for more information about Broader Impacts).

   NSF Fellows are expected to become globally engaged knowledge experts and leaders who can contribute significantly to research, education, and innovations in science and engineering. The purpose of this statement is to demonstrate your potential to satisfy this requirement. Your ideas and

examples do not have to be confined necessarily to the discipline that you have chosen to pursue.

If you have completed more than 12 months of graduate or post-baccalaureate study or a professional degree and an interruption of at least two consecutive years (fourth 0ption under Completed Study in the NSF GRFP Program Information section), please address the reasons for the interruption in graduate study here. Please refer back to that section for details.

Document Uploaded: Yes

To delete the uploaded document, click the "Delete" link. To replace a previously-uploaded document with a new document, delete the previously-uploaded document, and then you will get an upload option.

Delete
To view this statement in PDF format, click "View PDF". A new browser window will open. To print the PDF, use your browser's print function in the new window.

To Upload your Personal, Relevant Background and Future Goals Statement:

a. Either type the file location of your statement in the input box or click the **Browse** button to find the location.

b. Click the **Upload** button to begin the upload process.

The PDF Conversion/Compliance Check screen is displayed. Please be patient, this process may take a few minutes. Every 15 seconds this page will refresh to check the status of your file.
During the upload process, your file is converted to a PDF. After successful conversion, the File is Ready for Proofreading screen is displayed.

c. Proof-read the converted PDF file. Click the **Proofread PDF** button to proofread the converted file.

A new window is opened to display the PDF file. Pay special attention to check that all figures, graphics, tables, margins, page breaks, and other special formatting options have been accurately preserved.
The Proofreading Complete screen is displayed.

d. Click the **Accept** button to accept the converted PDF file (However, if you detected any problems in the PDF file, you can cancel the upload by clicking on the **Cancel** button. You may then correct the errors and resubmit the corrected version of your document.)

The Personal, Relevant Background and Future Goals Statement screen is displayed and a **View PDF** link is now displayed on the screen for your uploaded statement- (if the Accept button was clicked in step d).

NOTE: Statement files can be updated at any time prior to application submission. New, corrected, or revised statements will not be accepted after the application is submitted.

NOTE: Review panelists will not be able to view web page links when evaluating your application. Web links are not accepted in lieu of statements uploaded into the FastLane application.

NOTE: Please review the **Statement Preparation and Format Instructions** above for specific statement length and formatting guidance.

Graduate Research Plan Statement

The Graduate Research Plan Statement section allows the applicant to upload an statement that describes experience they have in research activities.
To Submit Previous Research Experience Information:

1. Click the **Graduate Research Plan Statement** link on the Prepare Application screen.

The Graduate Research Plan Statement screen is displayed.

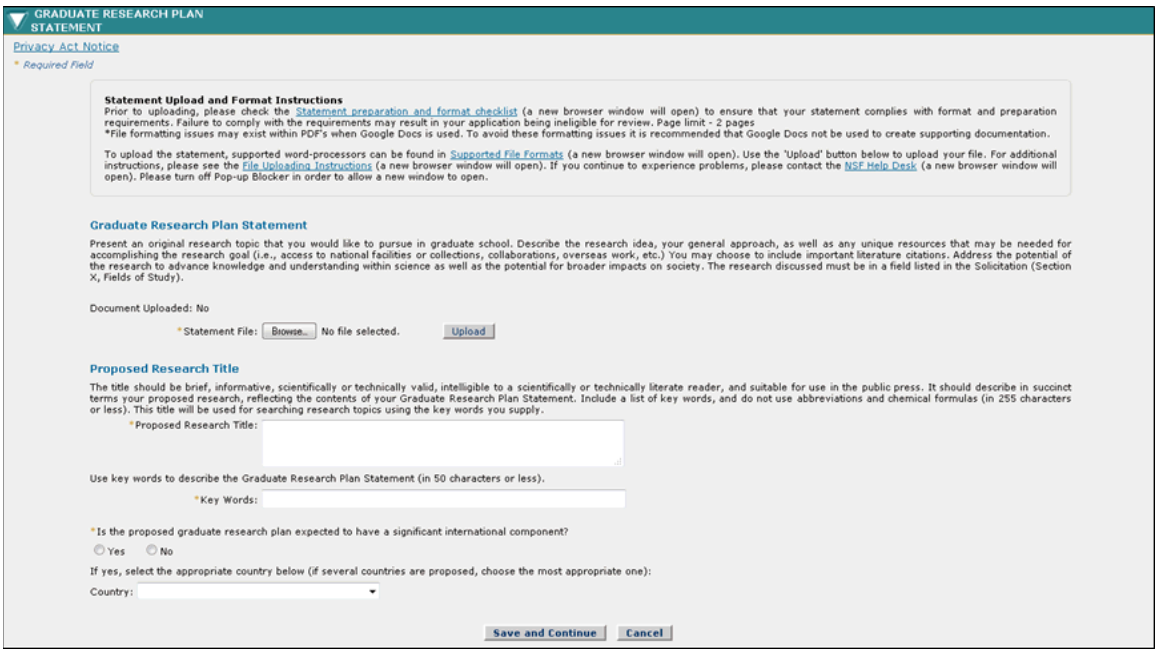


Figure 31: Graduate Research Plan Statement Section

NOTE: Before attempting to submit a statement for the Graduate Research Fellowship Application, it is important to make sure that java script is allowed within your browser, and that popup blockers are disabled. To view browser specific instructions on how to do this, please see section 13.

Present an original research topic that you would like to pursue in graduate school. Describe the research idea, your general approach, as well as any unique resources that may be needed for accomplishing the research goal (i.e., access to national facilities or collections, collaborations, overseas work, etc.) You may choose to include important literature citations. Address the potential of the research to advance knowledge and understanding within science as well as the potential for broader impacts on society. The research discussed must be in a field listed in the Solicitation (Section X, Fields of Study).

Prior to uploading, please check the Statement preparation and format checklist (a new browser window will open) to ensure that your statement complies with format and preparation requirements. Failure to comply with the requirements may result in your application being ineligible for review.
Page limit – 2 pages
*File formatting issues may exist within PDF's when Google Docs is used. To avoid these formatting issues it is recommended that Google Docs not be used to create supporting documentation.

To upload the statement, supported word-processors can be found in Supported File Formats (a new browser window will open). Use the 'Upload' button below to upload your file. For additional instructions, please see the File Uploading Instructions (a new browser window will open). If you continue to experience problems, please contact the NSF HELP Desk (a new browser window will open). Please turn off Pop-up Blocker in order to allow a new window to open.

Graduate Research Plan Statement.

To Upload your Graduate Research Statement:

a. Either type the file location of your statement in the input box or click the **Browse** button to find the location.

b. Click the **Upload** button to begin the upload process.

The PDF Conversion/Compliance Check screen is displayed. Please be patient, this process may take a few minutes. Every 15 seconds this page will refresh to check the status of your file.
During the upload process, your file is converted to a PDF. After successful conversion, the File is Ready for Proofreading screen is displayed.

c. Proof-read the converted PDF file. Click the **Proofread PDF** button to proofread the converted file.

A new window is opened to display the PDF file. Pay special attention to check that all figures, graphics, tables, margins, page breaks, and other special formatting options have been accurately preserved.
The Proofreading Complete screen is displayed.

d. Click the **Accept** button to accept the converted PDF file (If you detected any problems in the PDF file, you can cancel the upload by clicking on the Cancel button. You may then correct the errors and resubmit the corrected version of your documenht.) Please be aware that uploading a new file close

to the deadline time, combined with the file conversion time, may result in late receipt of your application. If your application is received after the deadline it will be returned without review).

The Graduate Research Statement screen is displayed and a View PDF link is now displayed on the screen for your uploaded statement (if te Accept button was clicked in step d).

NOTE: Statement files can be updated at any time prior to application submission. New, corrected, or revised statements will not be accepted after the application is submitted.

NOTE: Review panelists will not be able to view web page links when evaluating your application. Web links are not accepted in lieu of statements uploaded into the FastLane application.

NOTE: Please review the **Statement Preparation and Format Instructions** above for specific statement length and formatting guidance.

1. Enter your Proposed Research Title (character limit is 255 characters)
   a. The title should be brief, informative, scientifically or technically valid, intelligible to a scientifically or technically literate reader, and suitable for use in the public press. It should describe in succinct terms your proposed research, reflecting the contents of your topic. Include key words, and do not use abbreviations and chemical formulas.
2. Enter key words for your Graduate Research Statement (character limit is 50 characters)
   a. This key words will be used by NSF for searches.
3. Select yes or no to indicate whether the proposed research is expected to have a significant international component.
   a. If “yes” is selected, select the appropriate country. If several countries are proposed, select the country that is most appropriate.

NSF GRFP Program Information

The NSF GRFP Program Information section allows the applicant to select their status description and enter contact information for up to three academic advisors if enrolled in graduate school. This section also allows the applicant to select whether or not they want their name and e-mail address published if chosen for an award or honorable mention. In addition, the applicant can

enter how they learned about the NSF Graduate Research Fellowship and report other fellowships for which they are applying.

To Submit NSF GRFP Program Information:

1. Click the **NSF GRFP Program Information** link on the Prepare Application screen.

The NSF GRFP Program Information screen is displayed.

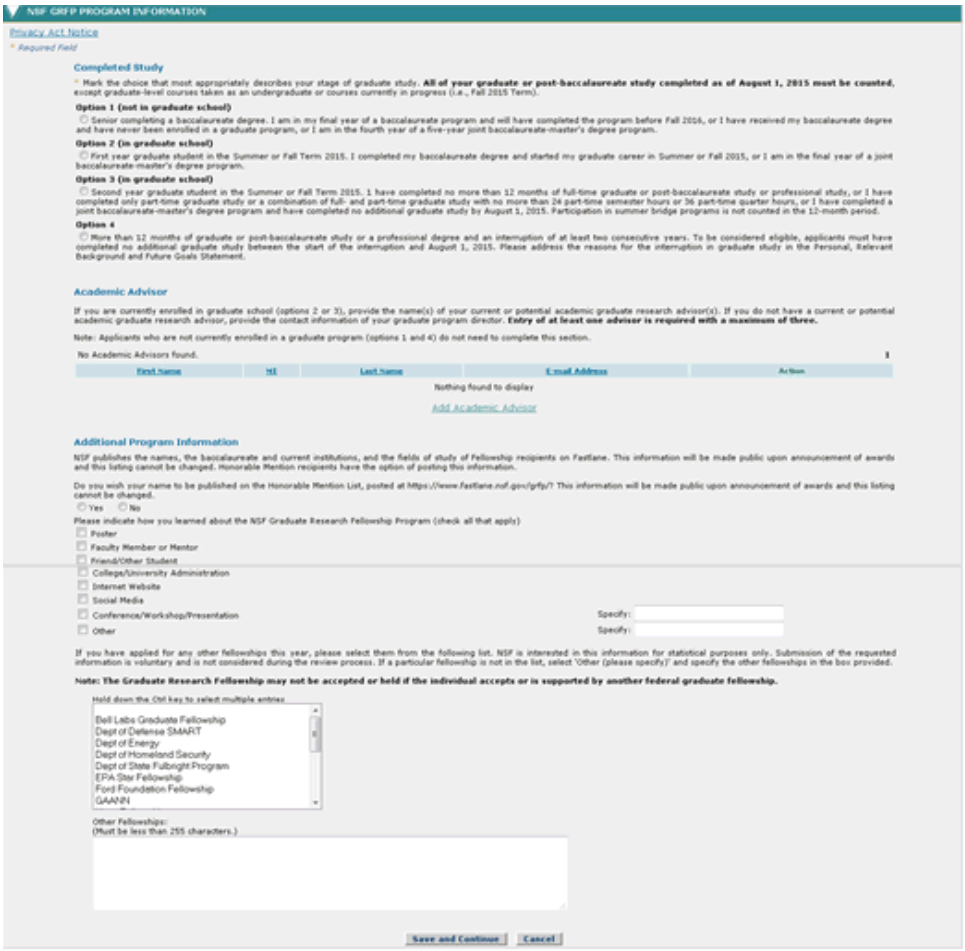


Figure 32: NSF GRFP Program Information Section

Completed Study

1. Select your status description from the list of choices (required).

2. If you select Option 4, please address the reasons for the interruption of graduate study in the Personal, Relevant Background and Future Goals Statement.

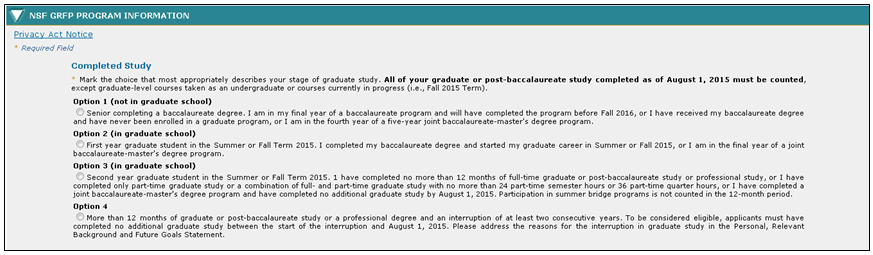


Figure 33: NSF GRFP Program Information Completed Study Section

Academic Advisor

If you are currently enrolled in graduate school (options 2 or 3), provide the name(s) of your current or potential academic graduate research advisor(s). If you do not have a current or potential academic graduate research advisor, provide the contact information of your graduate program director. **Entry of at least one advisor is required with a maximum of three.**

1. Click the **Add Academic Advisor** link.

The Add Academic Advisor screen is displayed.

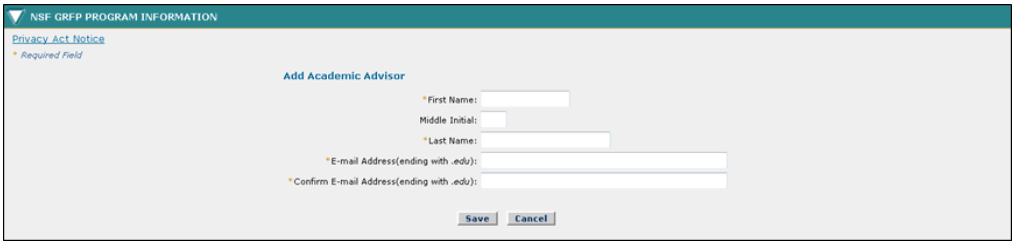


Figure 34: Add Academic Advisor Screen

2. Enter your Academic Advisor information. The table below describes all the fields.

Feature	Description
Last Name	Type the last name of the Academic Advisor (required).
First Name	Type the first name of the Academic Advisor (required).
Middle Initial	Type the middle initial of the Academic Advisor.
E-mail Address	Type the Academic Advisor's e-mail address (required).
Confirm E-Mail Address	Re-Type the Academic Advisor's e-mail address (required).

3. Click the Save button.

The Academic Advisor screen is displayed and the advisor information entered is displayed in the list. The Action field shows the options to Edit or Delete the advisor entry.

NOTE: The Academic Advisor e-mail address must end with '.edu'.

NOTE: Entry of an Academic Advisor is not required for options 1 and 4.

Additional Program Information

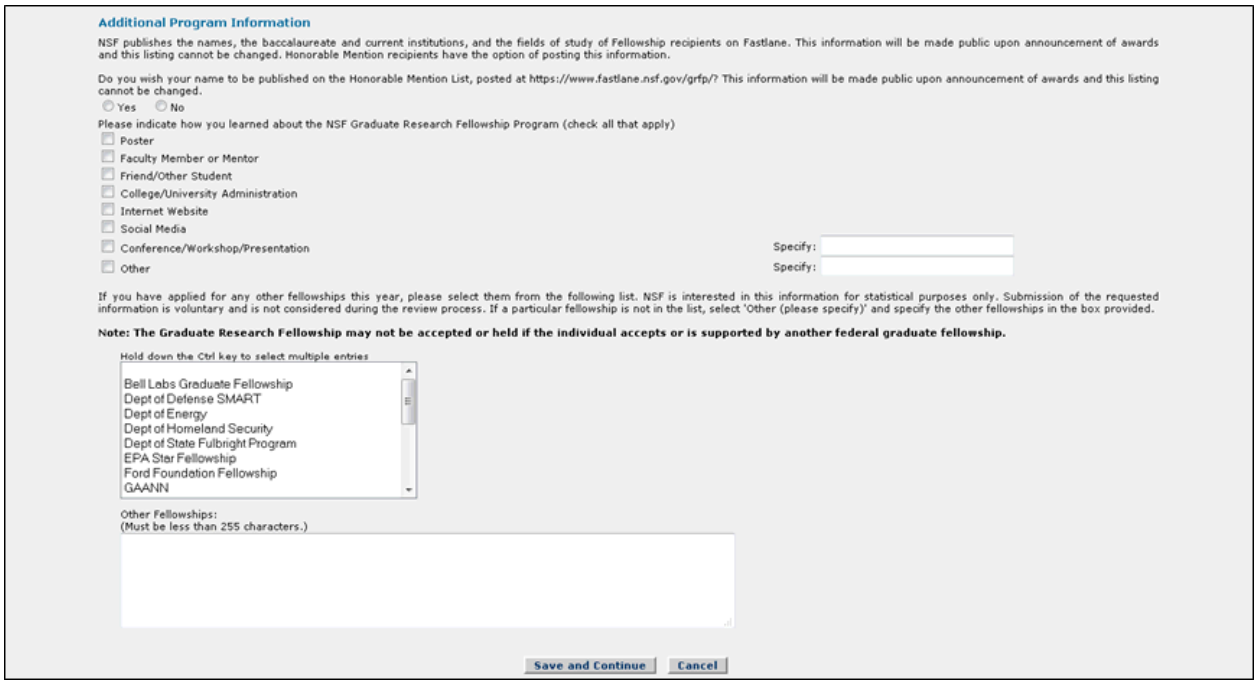


Figure 35: Additional Program Information Screen

1. Select "**Yes**" or "**No**" to indicate if you wish your name to be published on the Honorable Mention List, posted at https://www.fastlane.nsf.gov/grfp/. This information will be made public upon announcement of awards and this listing cannot be changed.

2. Select how you learned about the NSF Graduate Research Fellowships. (Check all that apply.)

3. Select any fellowships for which you have applied this year. (Select all fellowships that apply.) If a fellowship that you applied for is not listed, enter the fellowship name in the Other Fellowships field.

4. Click the **Save and Continue** button.

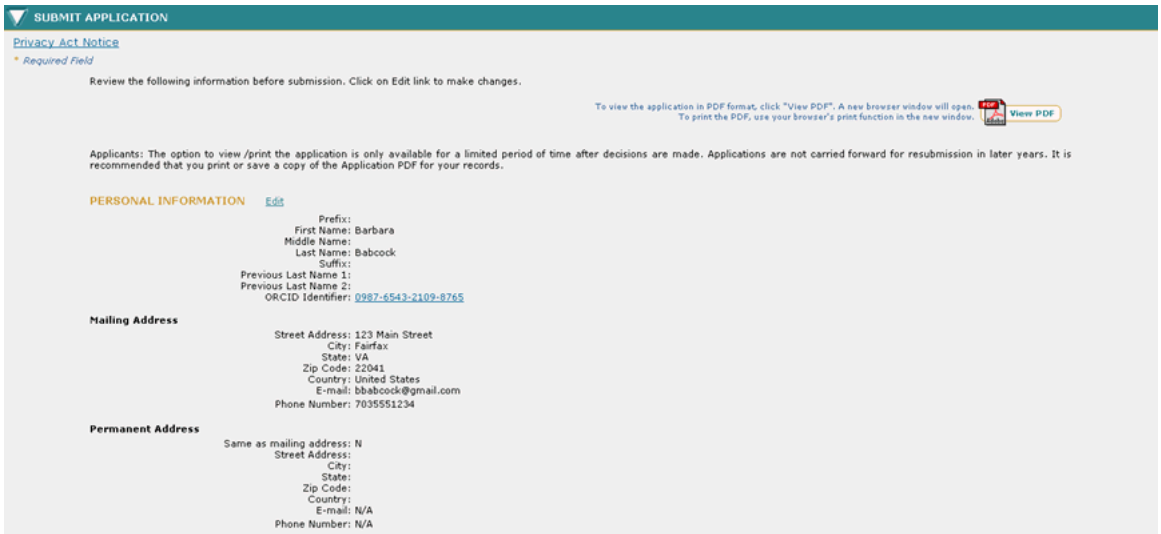
Your NSF GRFP Program Information is saved and the Submit Application screen is displayed.

Submit Application

The Submit Application section allows the applicant to review their entire application on one screen. The section also allows the applicant to view and print a PDF version of their application. Once the application has been reviewed, an applicant can click the Continue button to check the for application completeness. If all required fields have been completed, the applicant will be able to click Continue and provide an Electronic Certification. To Submit an Application:

1. Click the **Submit Application** link on the Prepare Application screen.

The Submit Application screen is displayed.



Date and Place of Birth

Date of Birth:
State:
Country:
Citizenship:
If permanent resident, date status was granted:

High School Location

City:
State:
Country:

Demographic Information

Gender:
Veteran Status:
Race:
Ethnicity:
Disability:

EDUCATION AND WORK EXPERIENCE Edit

List colleges or universities attended and your enrollment details.

List teaching and work experiences relevant to your field of study since entering college/university. Experiences do not have to be limited to the academic realm.

List your significant academic honors, fellowships, scholarships, publications and presentations.

Are you or have you been in a four- or five-year joint baccalaureate-master's degree program?
Baccalaureate Institution:
Current Institution:

PROPOSED FIELD OF STUDY Edit

Primary Field of Study:
Tentative Panel Name:

Is your proposed graduate study interdisciplinary?

What is the highest level degree toward which you expect to work while on your fellowship tenure? (Your answer will be used for statistical purposes only and will not be seen by the selection panel.):
Degree:

PROPOSED GRADUATE STUDY Edit

Proposed University or College:
Proposed Graduate Program:
City:
State:
Country:

REFERENCES Edit

List names and organizational affiliations of individuals submitting Letters of Reference (at least three reference letters must be received by the published deadline for the application to be complete and eligible for review).

PERSONAL, RELEVANT BACKGROUND AND FUTURE GOALS STATEMENT Edit

Please outline your educational and professional development plans and career goals. How do you envision graduate school preparing you for a career that allows you to contribute to expanding scientific understanding as well as broadly benefit society?

Describe your personal, educational and/or professional experiences that motivate your decision to pursue advanced study in science, technology, engineering or mathematics (STEM). Include specific examples of any research and/or professional activities in which you have participated. Present a concise description of the activities, highlight the results and discuss how these activities have prepared you to seek a graduate degree. Specify your role in the activity including the extent to which you worked independently and/or as part of a team. Describe the contributions of your activity to advancing knowledge in STEM fields as well as the potential for broader societal impacts (See Solicitation, Section VI, for more information about Broader Impacts).

NSF Fellows are expected to become globally engaged knowledge experts and leaders who can contribute significantly to research, education, and innovations in science and engineering. The purpose of this essay is to demonstrate your potential to satisfy this requirement. Your ideas and examples do not have to be confined necessarily to the discipline that you have chosen to pursue.

If you have completed more than 12 months of graduate or post-baccalaureate study or a professional degree and an interruption of at least two consecutive years (fourth option under Completed Study in the NSF GRFP Program Information section), please address the reasons for the interruption in graduate study here. Please refer back to that section for details.

Reviewers will read both statements. Please address Intellectual Merit and Broader Impacts in both written statements in order to provide reviewers with the information necessary to evaluate your application with respect to both Criteria. Please refer to the Program Solicitation for further information on the NSF Merit Review Criteria and Broader Impacts activities.

Document Uploaded: No

GRADUATE RESEARCH PLAN STATEMENT Edit

Present an original research topic that you would like to pursue in graduate school. Describe the research idea, your general approach, as well as any unique resources that may be needed for accomplishing the research goal (i.e., access to national facilities or collections, collaborations, overseas work, etc.) You may choose to include important literature citations. Address the potential of the research to advance knowledge and understanding within science as well as the potential for broader impacts on society. The research discussed must be in a field listed in the Solicitation (Section X, Fields of Study).

Document Uploaded: No

Proposed Research Title

The title should be brief, informative, scientifically or technically valid, intelligible to a scientifically or technically literate reader, and suitable for use in the public press. It should describe in succinct terms your proposed research, reflecting the contents of your proposal. Use key words, and do not use abbreviations and chemical formulas(in 255 characters or less). This title will be used for searching research topics using the key words you supply.

Proposed Research Title:

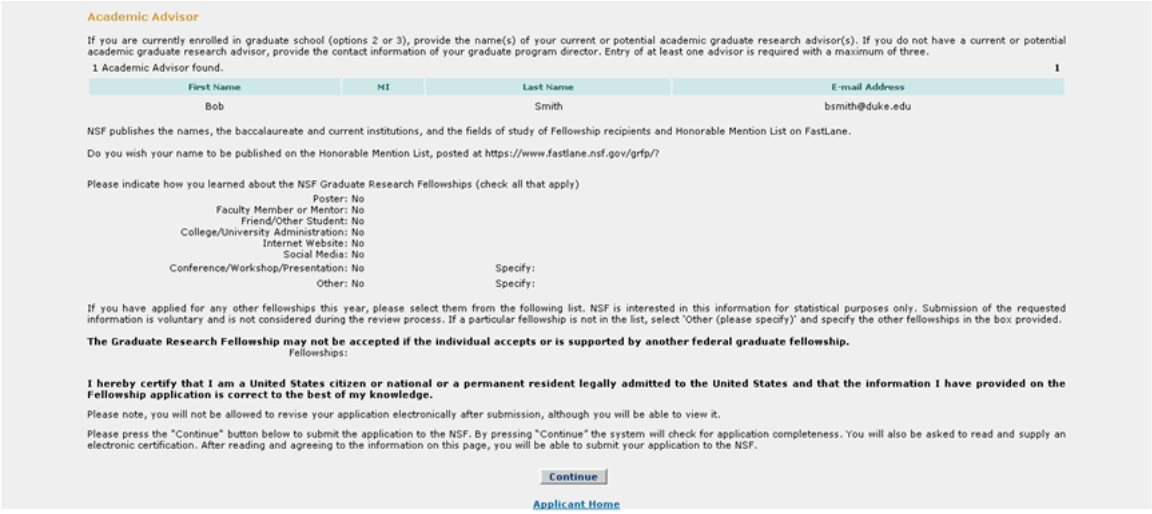
Use key words to describe the Graduate Research Plan Statement (in 50 characters or less).

Key Words:

Is the proposed graduate research plan expected to have a significant international component?

NSF GRFP PROGRAM INFORMATION Edit

Mark the choice that most appropriately describes your stage of graduate study. All of your graduate or post-baccalaureate study completed as of August 1, 2015 must be counted, except graduate-level courses taken as an undergraduate or courses currently in progress (i.e., Fall 2015 Term).



Academic Advisor

If you are currently enrolled in graduate school (options 2 or 3), provide the name(s) of your current or potential academic graduate research advisor(s). If you do not have a current or potential academic graduate research advisor, provide the contact information of your graduate program director. Entry of at least one advisor is required with a maximum of three.

1 Academic Advisor found. 1

First Name	MI	Last Name	E-mail Address
Bob		Smith	bsmith@duke.edu

NSF publishes the names, the baccalaureate and current institutions, and the fields of study of Fellowship recipients and Honorable Mention List on FastLane.

Do you wish your name to be published on the Honorable Mention List, posted at https://www.fastlane.nsf.gov/grfp/?

Please indicate how you learned about the NSF Graduate Research Fellowships (check all that apply)

Poster: No
Faculty Member or Mentor: No
Friend/Other Student: No
College/University Administration: No
Internet Website: No
Social Media: No
Conference/Workshop/Presentation: No Specify:
Other: No Specify:

If you have applied for any other fellowships this year, please select them from the following list. NSF is interested in this information for statistical purposes only. Submission of the requested information is voluntary and is not considered during the review process. If a particular fellowship is not in the list, select 'Other (please specify)' and specify the other fellowships in the box provided.

The Graduate Research Fellowship may not be accepted if the individual accepts or is supported by another federal graduate fellowship.
Fellowships:

I hereby certify that I am a United States citizen or national or a permanent resident legally admitted to the United States and that the information I have provided on the Fellowship application is correct to the best of my knowledge.

Please note, you will not be allowed to revise your application electronically after submission, although you will be able to view it.

Please press the "Continue" button below to submit the application to the NSF. By pressing "Continue" the system will check for application completeness. You will also be asked to read and supply an electronic certification. After reading and agreeing to the information on this page, you will be able to submit your application to the NSF.

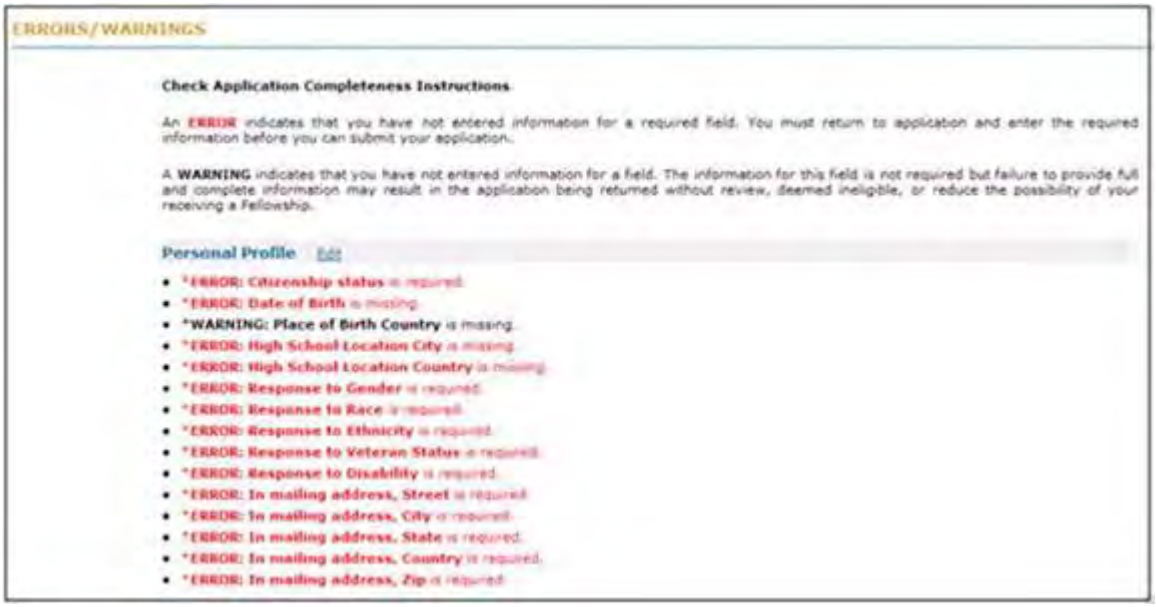
Continue

Applicant Home

Figure 36: Submit Application

2. Click the **Continue** button to check the applications completeness.

The Check Application Completeness screen is displayed.



ERRORS/WARNINGS

Check Application Completeness Instructions

An **ERROR** indicates that you have not entered information for a required field. You must return to application and enter the required information before you can submit your application.

A **WARNING** indicates that you have not entered information for a field. The information for this field is not required but failure to provide full and complete information may result in the application being returned without review, deemed ineligible, or reduce the possibility of your receiving a Fellowship.

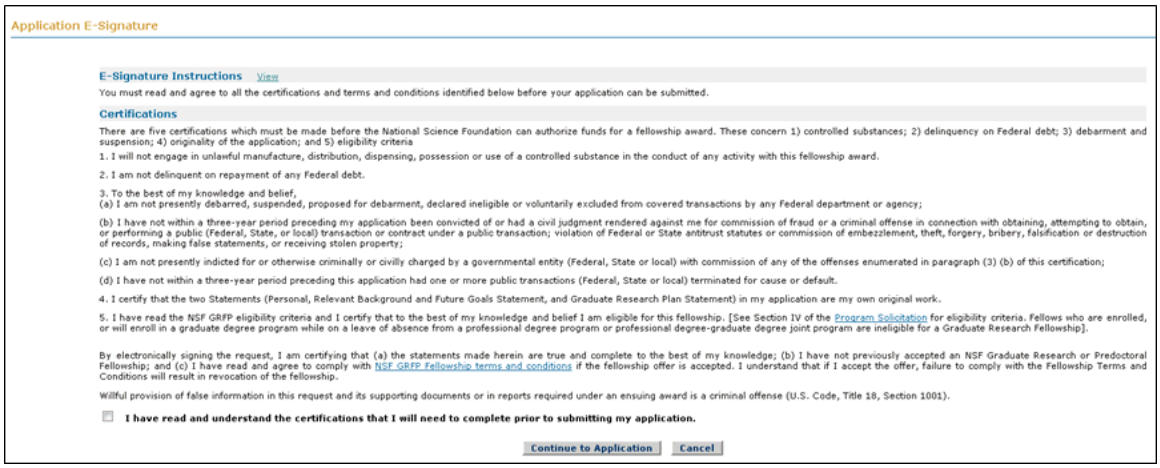
Personal Profile Edit

- ***ERROR: Citizenship status** is required.
- ***ERROR: Date of Birth** is missing.
- ***WARNING: Place of Birth Country** is missing.
- ***ERROR: High School Location City** is missing.
- ***ERROR: High School Location Country** is missing.
- ***ERROR: Response to Gender** is required.
- ***ERROR: Response to Race** is required.
- ***ERROR: Response to Ethnicity** is required.
- ***ERROR: Response to Veteran Status** is required.
- ***ERROR: Response to Disability** is required.
- ***ERROR: In mailing address, Street** is required.
- ***ERROR: In mailing address, City** is required.
- ***ERROR: In mailing address, State** is required.
- ***ERROR: In mailing address, Country** is required.
- ***ERROR: In mailing address, Zip** is required.

Figure 37: Check Application Completeness

3. Click **Continue** to provide an Electronic Certification.

The Applicant Electronic Certification screen is displayed.


Application E-Signature

E-Signature Instructions View

You must read and agree to all the certifications and terms and conditions identified below before your application can be submitted.

Certifications

There are five certifications which must be made before the National Science Foundation can authorize funds for a fellowship award. These concern 1) controlled substances; 2) delinquency on Federal debt; 3) debarment and suspension; 4) originality of the application; and 5) eligibility criteria

1. I will not engage in unlawful manufacture, distribution, dispensing, possession or use of a controlled substance in the conduct of any activity with this fellowship award.

2. I am not delinquent on repayment of any Federal debt.

3. To the best of my knowledge and belief,
(a) I am not presently debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from covered transactions by any Federal department or agency;

(b) I have not within a three-year period preceding my application been convicted of or had a civil judgment rendered against me for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State, or local) transaction or contract under a public transaction; violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;

(c) I am not presently indicted for or otherwise criminally or civilly charged by a governmental entity (Federal, State or local) with commission of any of the offenses enumerated in paragraph (3) (b) of this certification;

(d) I have not within a three-year period preceding this application had one or more public transactions (Federal, State or local) terminated for cause or default.

4. I certify that the two Statements (Personal, Relevant Background and Future Goals Statement, and Graduate Research Plan Statement) in my application are my own original work.

5. I have read the NSF GRFP eligibility criteria and I certify that to the best of my knowledge and belief I am eligible for this fellowship. [See Section IV of the Program Solicitation for eligibility criteria. Fellows who are enrolled, or will enroll in a graduate degree program while on a leave of absence from a professional degree program or professional degree-graduate degree joint program are ineligible for a Graduate Research Fellowship].

By electronically signing the request, I am certifying that (a) the statements made herein are true and complete to the best of my knowledge; (b) I have not previously accepted an NSF Graduate Research or Predoctoral Fellowship; and (c) I have read and agree to comply with NSF GRFP Fellowship terms and conditions if the fellowship offer is accepted. I understand that if I accept the offer, failure to comply with the Fellowship Terms and Conditions will result in revocation of the fellowship.

Willful provision of false information in this request and its supporting documents or in reports required under an ensuing award is a criminal offense (U.S. Code, Title 18, Section 1001).

I have read and understand the certifications that I will need to complete prior to submitting my application.

Continue to Application Cancel

Figure 38: Application Electronic Certification

NOTE: The applicant must read and agree to the certification and check all certification check boxes on the page to proceed to submit the application package.

You may click the "**View**" link next to the E-Signature Instructions to see detailed instructions and definition of certification terms.

4. Check all certification check boxes, and Click **Sign and Submit Application**.

Once you have clicked the Sign and Submit Application button, your application will be submitted to the NSF for review.

Check Application Completeness

The **Check Application Completeness** link will be available in your Application Package Optional Task List. Click on this link at any time while preparing your application to display the readiness of your application for submission. When you perform this task to check your application, the system returns a list of both required and optional fields that have not been completed and the section of the application that the field is contained. The task link will remain until you have submitted the application.

Welcome Applicants

Please read the Program Solicitation and the information found in the Applicant Help link located on the left of the screen prior to completing an Application Package. Use the navigation links and buttons within the application to navigate through the application package. Using the navigation buttons on your Internet browser toolbar can result in the loss of data that was entered.

Application Package Task List

- Prepare Application
- View/Print Application
  The option to view /print the application is only available for a limited period of time after decisions are made. Applications are not carried forward for resubmission in later years.

Application Package Optional Task List

- Check Application Completeness
- Manage References
- Check Application Package Status
- Cancel Application Package

Figure 39: Check Application Completeness Link From Optional Task List

You also have the option to access this feature from within the **Prepare Application** Link.

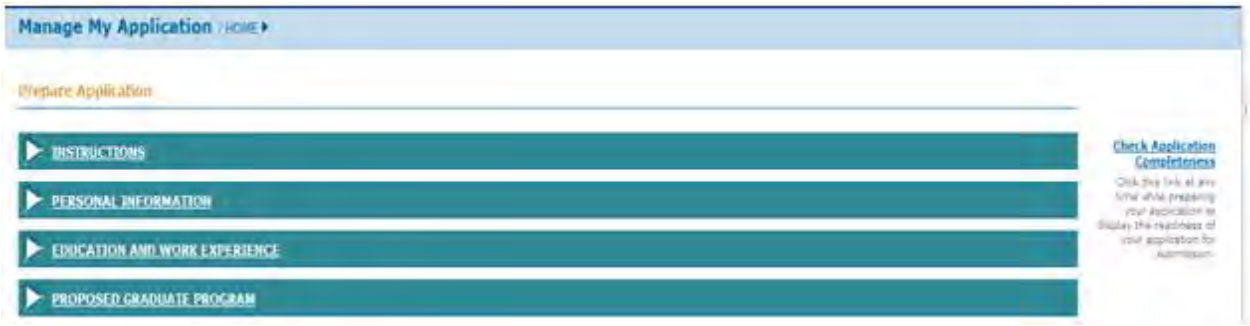


Figure 40: Check Application Completeness Link Within the Application

View / Print application

The **View / Print Application** link will be available in your Application Package Task List. Click on this link so that you can View/Print the Application. It is strongly recommended that you save a copy or print a copy of your application as the application is only available in the GRFP system for a limited period of time.

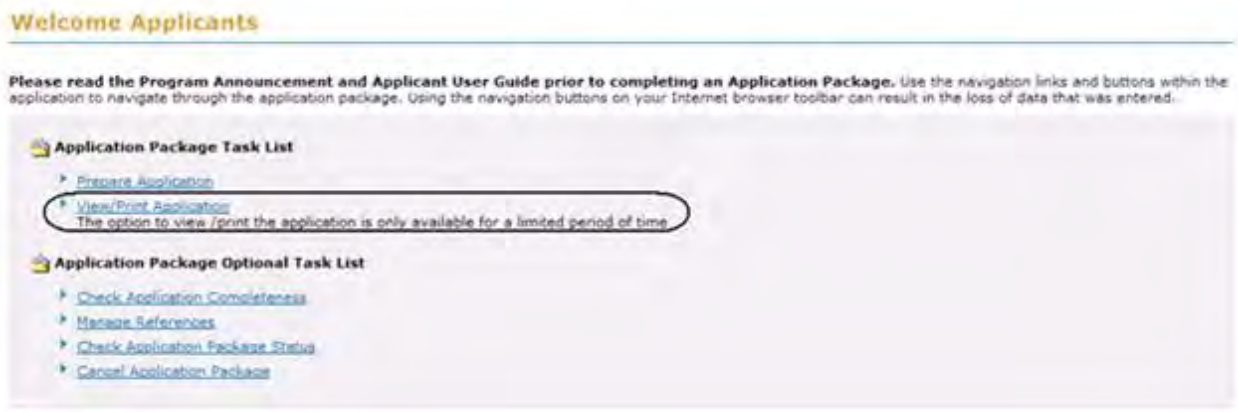


Figure 41: View/Print Application Link

To view the Application in a printable Adobe PDF version, click the **View PDF** link in the upper right hand corner of the View/Print Application screen. This feature is available both prior to and after application submission.

Figure 42: View/Print Application

The Open Researcher and Contributor ID (ORCID) will display as a 16-digit number in groups of four digits separated by a hyphen, with a hyperlink to the ORCID registry web site. This will allow the Applicant to validate his/her profile on the registry.

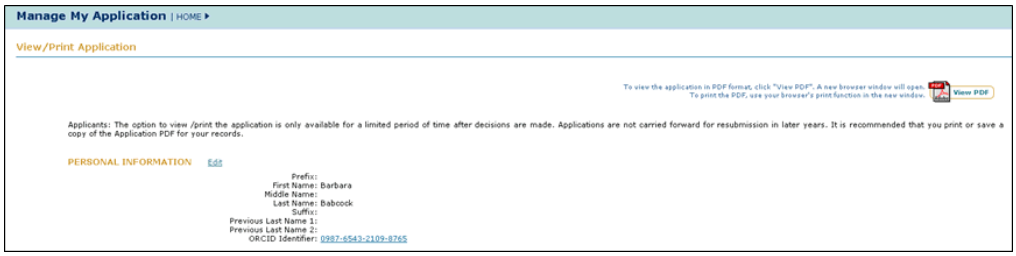


Figure 43: View/Print Application with ORCID Entry

Manage references

The **Manage References** link will be available in your Application Package Optional Task List. Click on this link to manage your references. You may add references for your application package even after you have submitted your application using this task link. When you add a reference name to the system and click "**send e-mail**", an e-mail is sent to the reference person with the reference request. The e-mail will contain a link that the reference person can use to access and submit their reference letter.

Figure 44: Manage References Link

NOTE: E-mails are the primary source of communication used by the GRFP Administrators. It is important for you to use an active e-mail address and to update the e-mail address if it changes.

Cancel Application Package

The **Cancel Application Package** link will be available in your Application Package Optional Task List until you have submitted the application. If you decide not to complete the Graduate Research Fellowship Application, you may remove your application from the GRFP system by clicking on the Cancel Application Package link before the submission deadline.

Figure 45: Cancel Application Package Link

Withdraw Application Package

The **Withdraw Application Package** link will appear in your Application Package Optional Task List after you have submitted the application. Click on this link to withdraw your application package before the submission deadline if you decide you do not want your application package reviewed for award consideration. If you wish to withdraw your application after the submission deadline, you must contact the GRF Operations Center with that request.

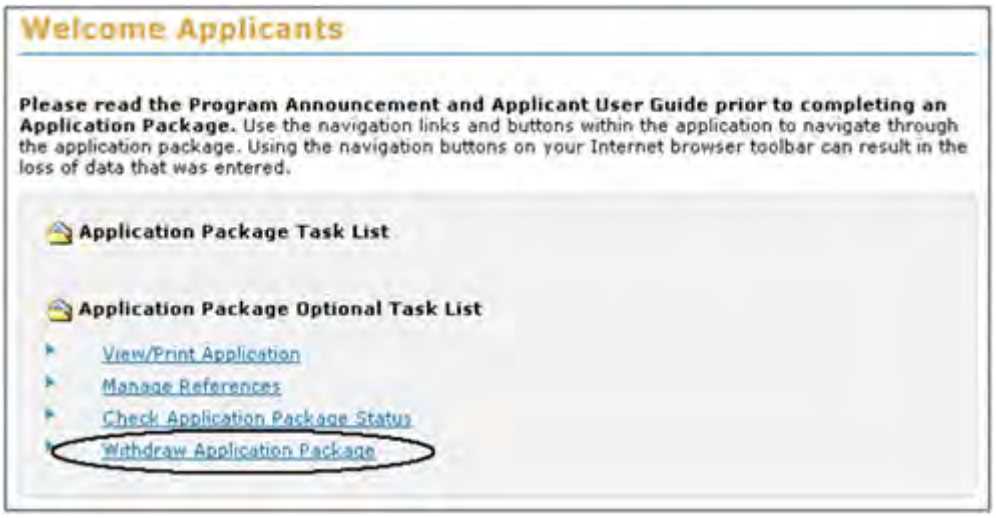


Figure 46: Withdraw Application Package Link

Managing Your Profile

Managing Your Profile

Your user profile includes your name, Open Researcher and Contributor ID (ORCID), mailing contact information, and permanent contact information. Your name and mailing contact information are displayed in the Applicant Data area on the right side of your home page. If entered, the ORCID will be displayed below the name field, with a hyperlink to the ORCID registry to allow you to validate your ORCID profile. You may view or update your GRFP profile at any time using the **Update My Profile** link found in the Applicant Data area. When updating your profile information, you may make changes to your name, ORCID, mailing contact information, or permanent contact information. The required fields in your profile are marked with an asterisk.

TIP: All correspondence related to your application will be sent to your mailing contact information. Your mailing e-mail address will also be the e-mail address that all system-generated e-mails and reminders will be sent to. Please be sure that you keep this information up-to-date.

Update Applicant Profile

To Update Your Profile:

1. Click the **Update My Profile** link from your home page Applicant Data area.

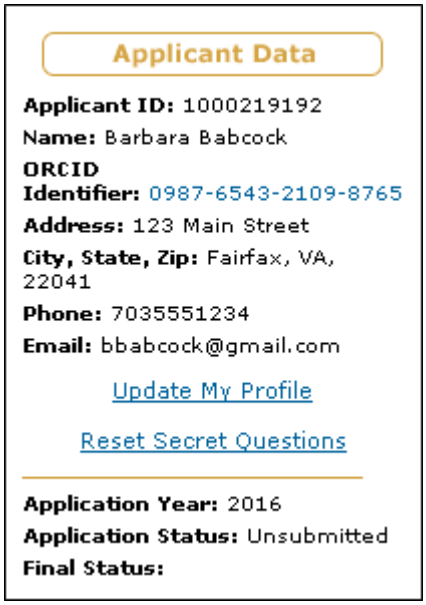


Figure 47: Update My Profile Link

NOTE: The Open Researcher and Contributor ID (ORCID) will display as a 16-digit number in groups of four digits separated by a hyphen, with a hyperlink to the ORCID registry web site. This will allow the Applicant to validate his/her profile on the registry.

Your current profile information is displayed with the ability to edit each field.

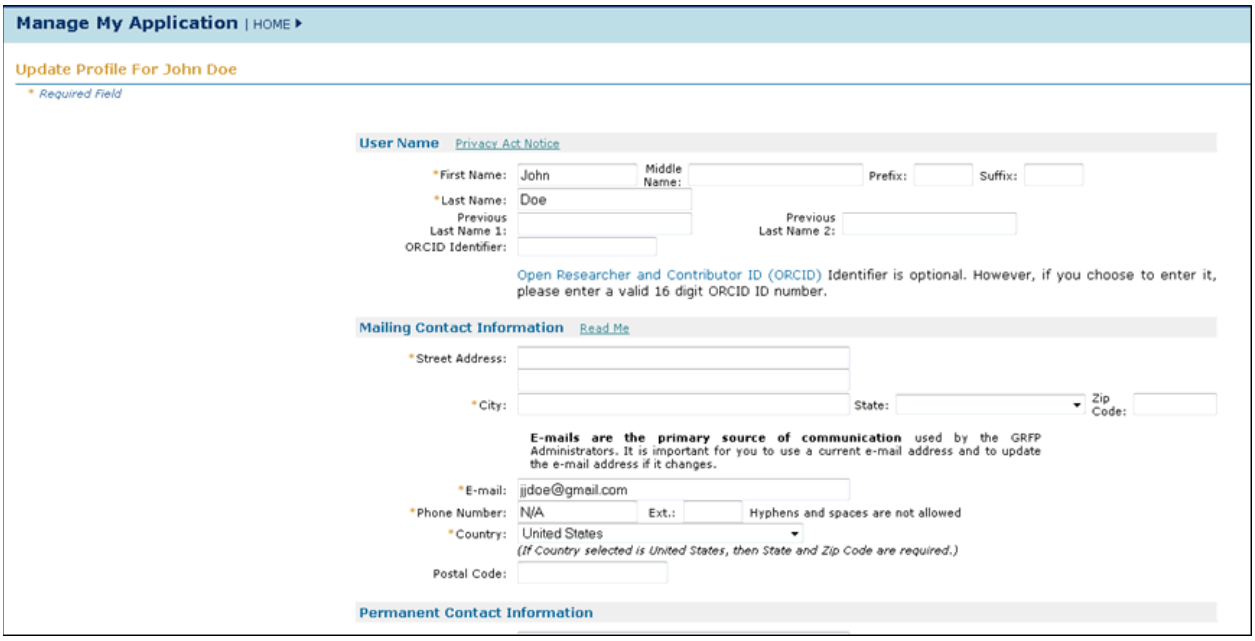


Figure 48: Update My Profile Screen

2. Enter the changes to your profile information.

3. Click the **Save** button.

Once you have submitted the changes to your profile, a confirmation screen is displayed. You may select the **GRFP Home Page** link to return to your home page and task list. Any changes to your mailing contact information will be reflected in the profile area of your applicant data.

Creating or Resetting Secret Questions and Answers

In the event you are unable to remember your login Password or User Name, you are able to reset (password) or retrieve (username) these items. To reset or retrieve your Password or Username, you will have to correctly answer either one or two secret questions.
To set or reset your Secret Questions and Answers:

1. Select the Reset Secret Questions link from the Applicant Data section of the Applicant main screen.

Figure 49: Reset Secret Questions Link

The Reset Secret Questions screen appears:

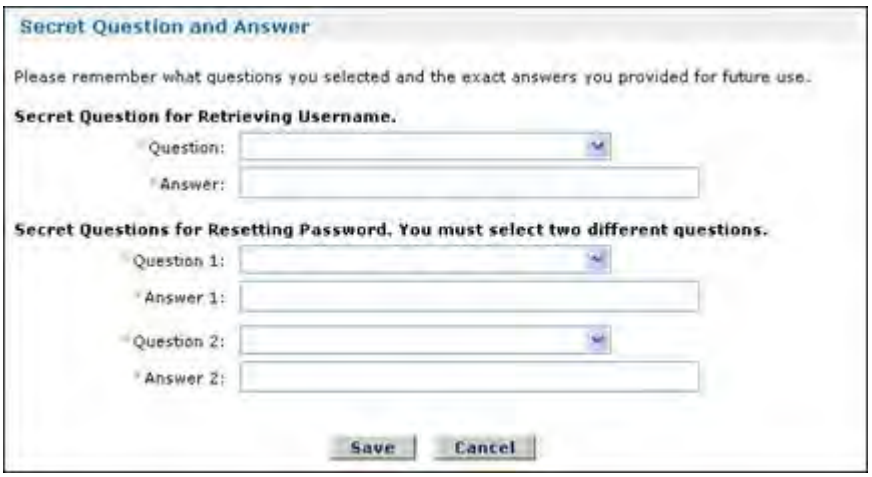


Figure 50: Reset Secret Questions Screen

2. Select one question for retrieving your Username and provide the answer.
3. Select two different questions for resetting your Password and provide the answers.
4. Click the **Save** button.

You will be need to recall the questions answered and to provide the correct answers to in the event you later choose to reset your password or retrieve your username through the Forgot Password or Forgot Username features (see the Resetting Your Password and Retrieving your Username sections)

Check Your Application Package Status

You are able to check your application package status by clicking on the **Check Application Package Status** link in your Application Package Optional Task List. The check application package status screens allow you to obtain Application Package Requirement Information, Deadlines for the Applications Packages, Contact Information for Issues, and actual the status of the submitted GRFP Application, and Reference Letters.

To Check Your Application Package Status:

1. Click the **Check Application Package Status** link.

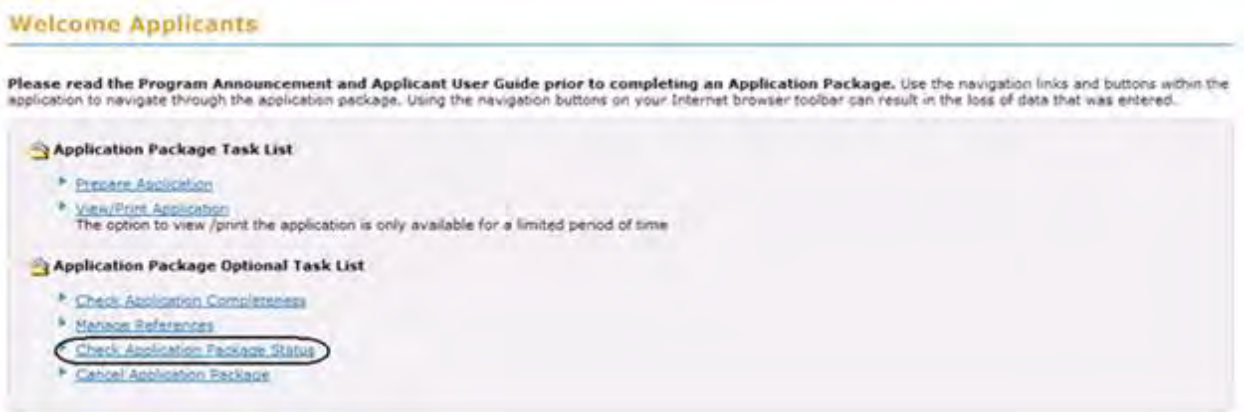


Figure 51: Application Package Task List Screen

The Informational Screen is displayed.

Figure 52: Informational Screen

2. To check your current application status, click the **View Your Application Package Status** link.

The Current Application Package Status Screen is displayed.

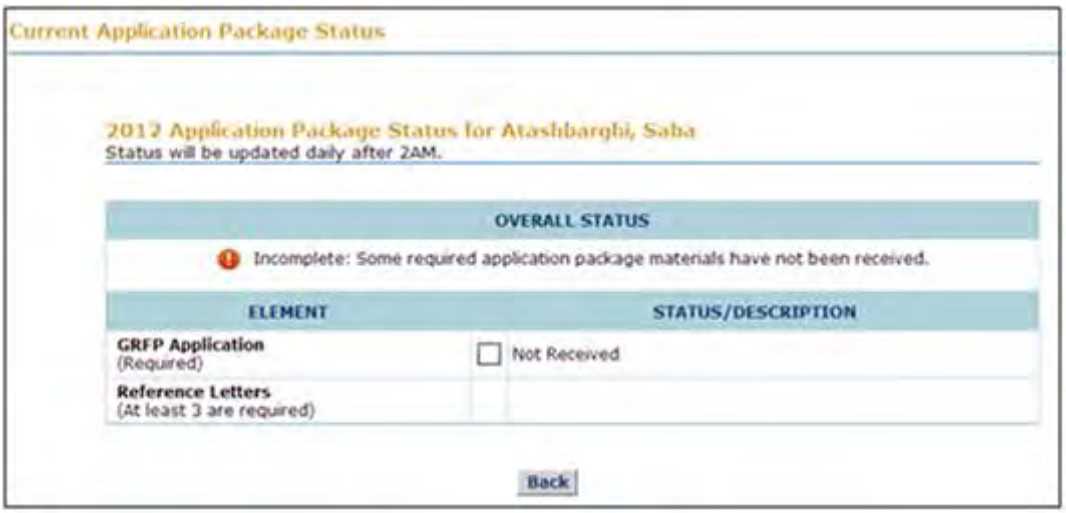


Figure 53: Application Package Status Screen

The Current Application Package Status Screen provides you with the latest status of your current application. The Overall Status of your application is provided at the top of the page, and will inform you if your Application Package is complete or incomplete. The Overall Status will remain incomplete until all of the required materials have been received. Each Application Package Element will display its status with either an empty or checked box next to it. An empty box indicates that the item has not yet been received. A checked box indicates that the item has been received. It is important to note that application package statuses are updated daily. Therefore, the system may not reflect an updated package status until the day after an item is submitted.

Instructions for Reference Writers

Instructions for Reference Writers

Reference Writers must submit their letters of reference through the FastLane system. Only the reference letters submitted via FastLane will be accepted for the NSF Graduate Research Fellowship program.

Getting Access

Creating your Reference Writer Password

If this is your **first time submitting a reference letter for the NSF Graduate Research Fellowship Program (GRFP) this application year**, you must create a new password for this application year:

1. Access FastLane to create your password by doing either of the following: 1) use the URL sent in the e-mail you received from the FastLane system via the applicant Or 2) navigate to the site by going to the Main GRFP page at https://www.fastlane.nsf.gov/grfp/
2. Click the "Submit Reference Letter" link
3. Click "Create a New Password"
4. Enter the e-mail address entered by the applicant (this information is contained in the body of the e-mail you received requesting the letter of reference)
5. You will receive your temporary password via e-mail

6. Go to http://fl.acpt.nsf.gov/grfp/ReferenceLetter.do?method=letter

7. Enter your e-mail address, as provided by the applicant (this information is contained in the body of the e-mail you received requesting the letter of reference)

8. Enter the following temporary password:

Your temporary password is: [Complete]

If you copy and paste the temporary password, please make sure that no extra spaces or characters are selected.

9. Follow the prompts to change your temporary password

Once you have changed your password, follow the instructions below to login and submit reference letters

Logging In as a Reference Writer

1. Access FastLane to submit a letter of reference by doing either of the following: 1) use the URL sent in the e-mail you received from the FastLane system via the applicant Or 2) navigate to the site by going to the Main GRFP page at https://www.fastlane.nsf.gov/grfp/ and clicking the **"Submit Reference Letter"** link.

2. Once on the Reference Letter Log In page, enter your login information in the log in box on the bottom of the screen.

Figure 56: Reference Writer Log In

3. Type your e-mail address in the **E-mail Address** field.

4. Type the password you received in Step 1 in the **Password** field.

5. Click the **Log In** button.

NOTE: Your Reference Writer password is unique to the GRFP system. If you have an existing FastLane login, it will not be recognized by the GRFP system.

The Reference Writer Homepage appears with Reference Letter Submission Instructions and your Reference Letter List.

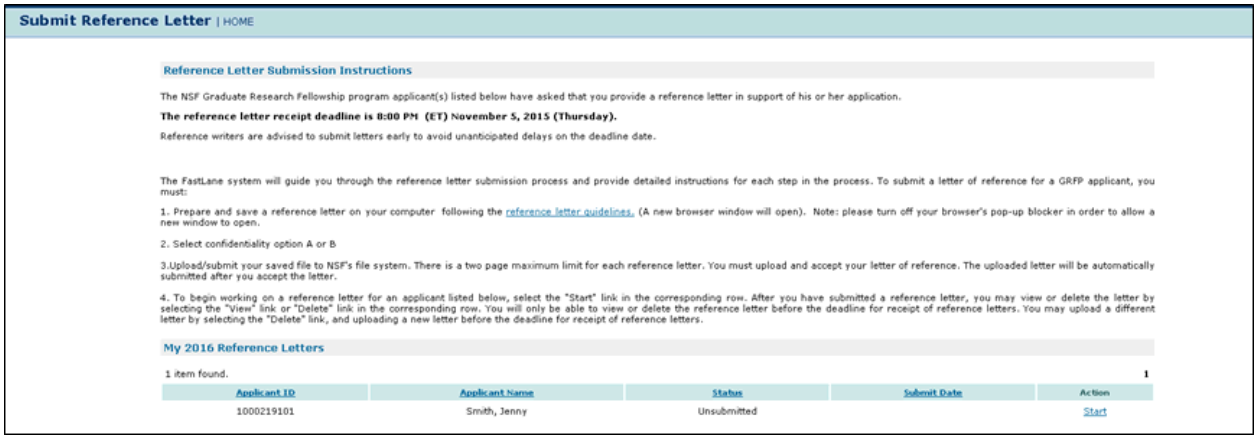


Figure 57: Reference Writer Submission Page

Resetting a Password

1. Click on the **Forgot Password?** link found under the Login button on the Reference Writer Log In page.

The Forgot Password screen is displayed.

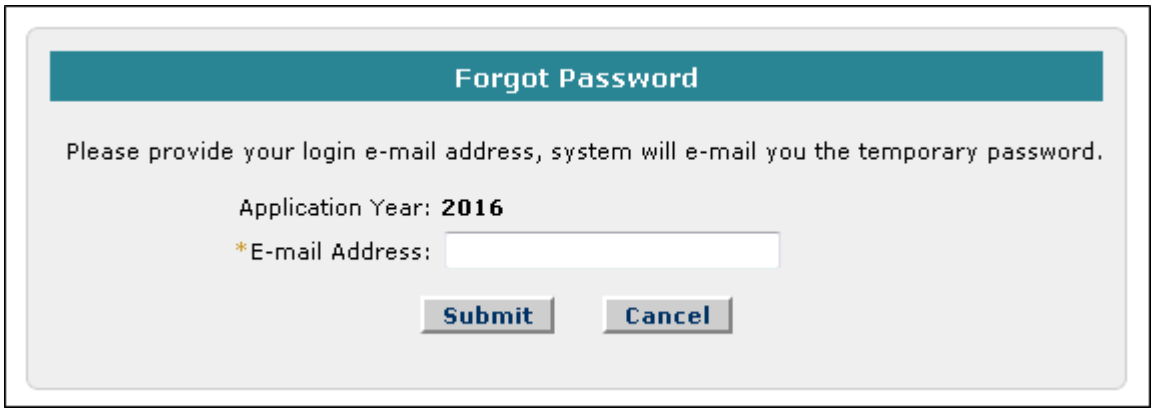


Figure 58: Forgot Password Screen

2. Type your -mail address in the **E-mail Address** field.

3. Click on the **Submit** button.

A confirmation screen will be displayed and the system will e-mail you a temporary password to the e-mail address you provided. Once you log back into the system with the temporary password, you will be asked to change your temporary password to a new password of your choice (additionally there is a Change Password link in the upper-right navigation bar that will provide the same temporary password via e-mail).

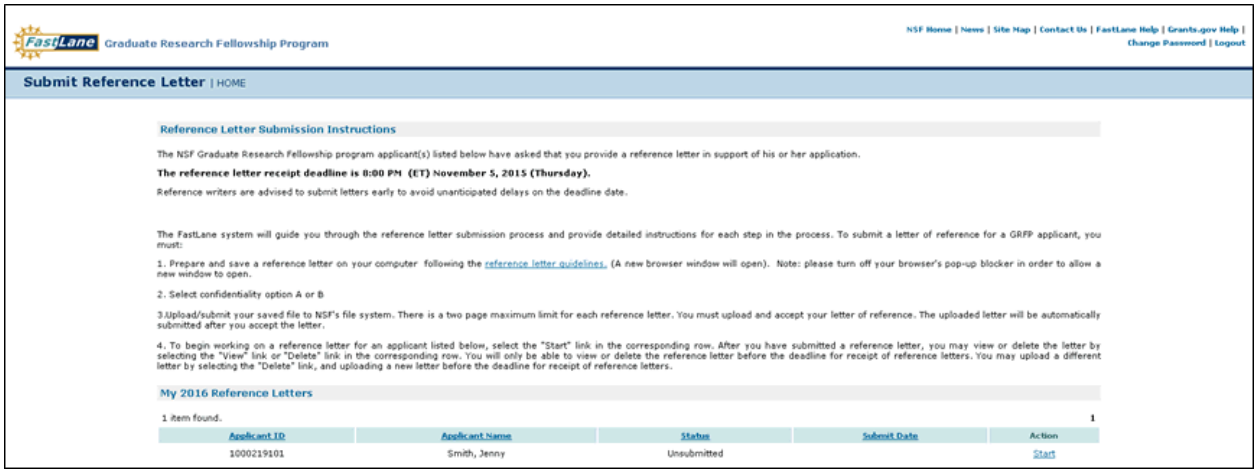


Figure 59: Change Password Link

The Change Password screen is displayed.

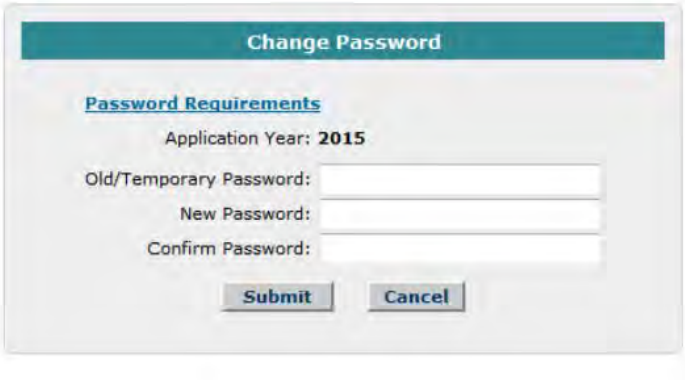


Figure 60: Change Password Screen

2. Enter your Old/Temporary Password, your New Password, and Confirm your New Password.

NOTE: Password length must be between 6 and 20 characters. The password must contain at least one alphabetic and one numeric character. Passwords are not case sensitive. You cannot reuse the last three passwords you have used. Passwords expire every 180 days. Passwords for users with Financial Functions permissions expire.

3. Click the **Submit** button.

A confirmation screen is displayed indicating you have successfully changed your password. You may select the **Reference Home Page** link to return to your Reference Letter list.

Logging Out

Once you have logged into the GRFP Reference Letter Submission process, a Logout link is available in the upper-right navigation bar.

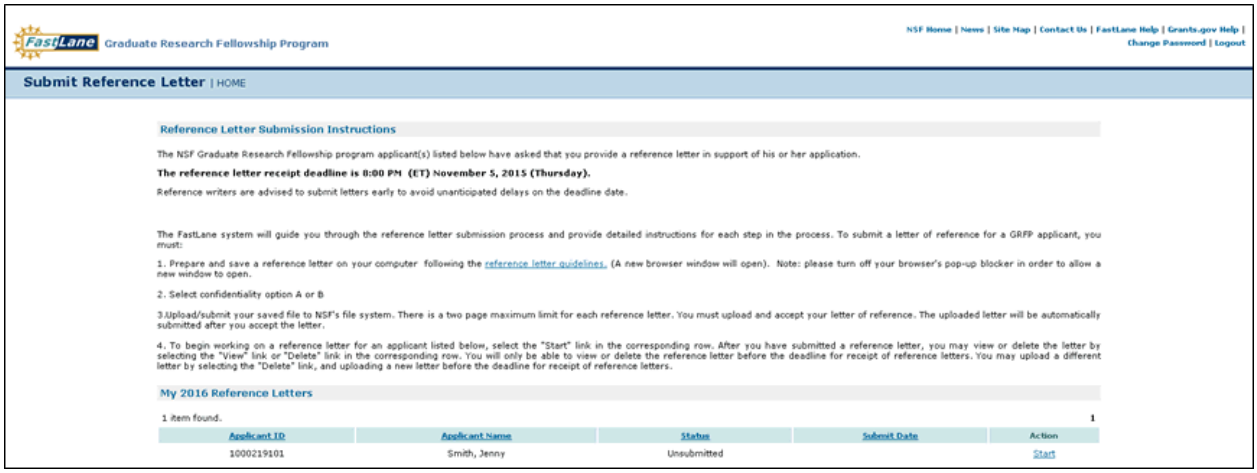


Figure 61: Logout Link

To exit the application at any time, click the **Logout** link. The web browser returns to the GRFP homepage.

Understanding Your Reference Letter List

Your reference letter list provides a list of all applicants for the current application year who have requested that you provide a letter of reference on their behalf.

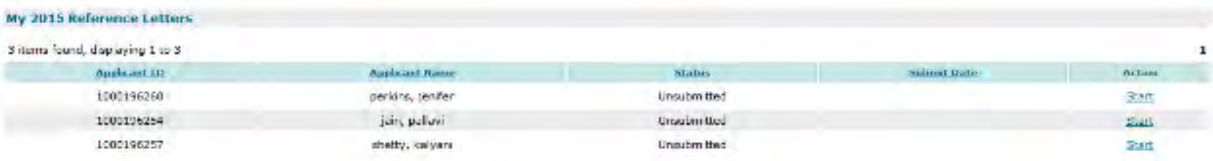


Figure 62: Reference Letter List

The list below describes the attributes of the Reference Letter List.

Feature	Description
Applicant ID	The Applicant ID is the number that NSF assigns to an applicant when they begin their application to NSF.
Applicant Name	The names of the applicants who have asked you to provide a letter of reference.
Status	The individual status of each letter of reference is listed. The status of each letter will remain "Unsubmitted" until the submission process has been completed for that particular letter, at which point the status will be updated to "Submitted".
Submit Date	The date that a particular letter of reference was submitted to NSF.

Action	The action links allow a reference writer to “Start” a reference letter, “Submit” an unsubmitted letter, or to “View/Delete” a submitted letter of reference.

Submitting a Letter of Reference

Once you have chosen a password, and logged in to the Reference Letter GRFP Reference Letter Submission process, the **Start** link will be available in your Reference Letter List for each current applicant who has requested that you provide a letter of reference on their behalf. Click on this link to begin or continue the reference letter submission process for a particular applicant. The Start link will remain next to each applicant’s name until you have either submitted the letter of reference for this applicant, or the deadline for submission has passed, whichever comes first.

To Submit a Letter of Reference:

1. Click the **Start** link on the Reference Writer Homepage for the applicant you would like to submit a letter of reference.

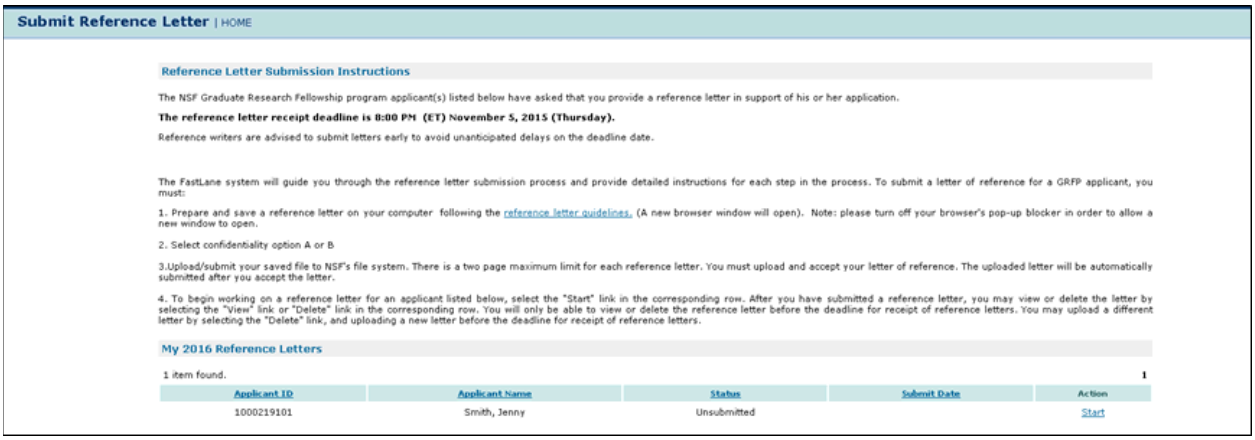


Figure 63: Reference Letter List

The Prepare Submission of Letter of Reference screen is displayed.

Figure 64: Prepare Submission of Letter of Reference Section

The Reference Letter Submission process is divided into steps with separate headings. Instructions are provided for completing each section. The required fields in each step are indicated by an asterisk (*). You must complete the sections in order. Once you have uploaded your letter of reference and accepted the PDF version of this letter, the uploaded

version of this letter is saved, and the submission process can be completed at a later time. Click "Continue" to save your data and advance to the next step.

WARNING: Using the buttons on your Internet browser toolbar can result in the loss of data.

Write Letter of Reference

The Write Letter of Reference section of the reference letter submission process contains the contact information of the applicant who you are writing for, and your profile details the applicant provided. For your convenience, the "reference letter guidelines" link provides the guidance for what information to include in the letter of reference, and the formatting instructions which were detailed in the original request e-mail from the National Science Foundation. This guidelines will open in a new window for easy reference as you write your letter.

Figure 65: Prepare Submission of Letter of Reference Section

To Complete the Write Letter of Reference Section:

1. Once you have prepared your letter in a word processor, you may click the **Continue** button to advance to the next step.

The Select Confidentiality Screen is displayed.

Select Confidentiality and Submit Letter of Reference

Select one of the confidentiality statements, and click continue to proceed to upload and submit the letter of reference.

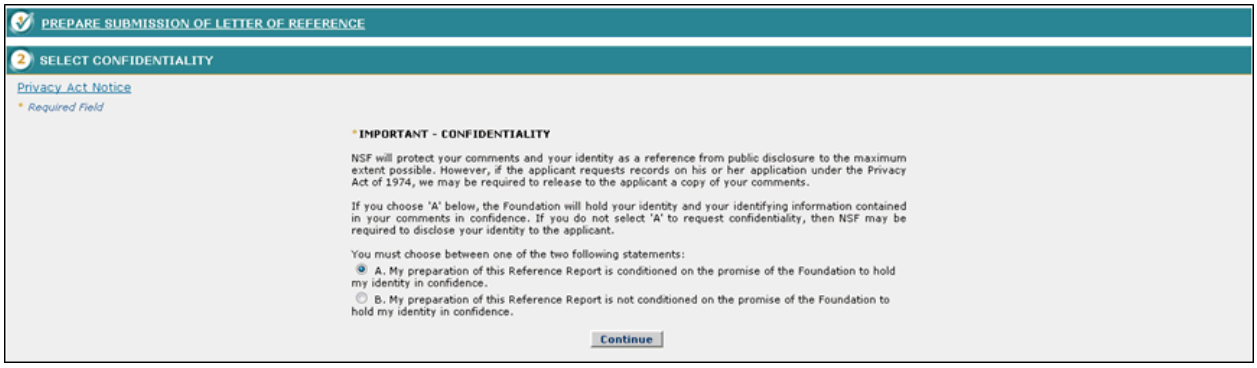


Figure 66: Select Confidentiality Section

To Select Confidentiality:

1. Select one of the two confidentiality statements:

   a. My preparation of this Reference Report is conditioned on the promise of the Foundation to hold my identity in confidence.

   b. My preparation of this Reference Report is not conditioned on the promise of the Foundation to hold my identity in confidence.

2. Click the Continue button to proceed to upload the reference letter for the Applicant.

Upload and Accept Letter of Reference

Once you have produced and saved a soft copy of your reference letter in one of the supported file formats, you are ready to upload your file to the National Science Foundation server. During the upload process, your file will be converted into a PDF version of your letter of reference. You will be given the opportunity in this step to proofread the converted document to ensure that the file is accurately displayed.

NOTE: Before attempting to submit a letter of reference for an applicant, it is important to make sure that java script is allowed within your browser, and that popup blockers are disabled. To view browser specific instructions on how to do this, please see section 13.

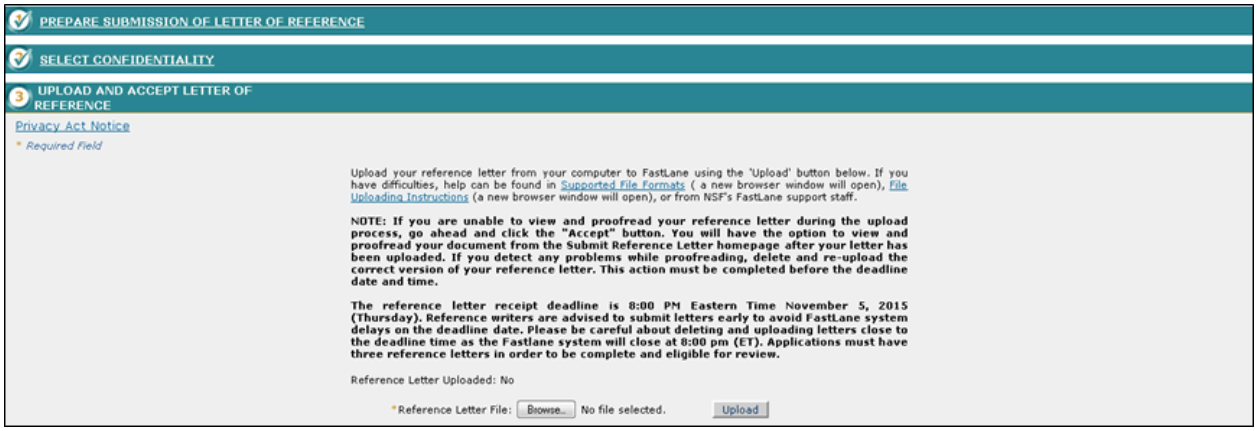


Figure 67: Upload and Accept Letter of Reference Section

To Upload a Letter of Reference:

1. Either type the file location of the reference letter in the input box or click the **Browse** button to find the location of the file.

2. Click the **Upload** button to begin the upload process.

The PDF Conversion/Compliance Check screen is displayed.

PDF Conversion/Compliance Check

Please be patient, this process may take a few minutes. Make sure your browser settings have javascript and popups from www.fastlane.nsf.gov enabled. Otherwise you will not be able to complete the file upload properly.

Every 15 seconds this page will refresh to check the status of your file.

You can check the latest status by clicking on the following link: Check PDF Conversion/Compliance Status

You can cancel this process by clicking the following link: Cancel PDF Conversion/Compliance Check

Portions copyright 2002, Adobe Systems Inc.

PDF Conversion in Progress

Figure 68: PDF Conversion/Compliance Check Screen

Please note this process may take a few minutes. Every 15 seconds this page will refresh to check the status of your file. During the upload process, the file is converted to a PDF. After successful conversion, the File is Ready for Proofreading screen is displayed.

File is ready for proofreading

Proofread Results

Please click the "Proofread PDF" button below to proofread the uploaded file, paying special attention to check that all figures, graphics, tables, margins, page breaks, and other special formatting options have been accurately preserved. **Note**: This feature requires that javascript and Popups from www.fastlane.nsf.gov be enabled on your browser.

NOTE: Clicking the "Proofread PDF" button will create a NEW window to display the PDF file.

After proofreading your document, close the new window to return to this window and complete your upload.

Proofread PDF

National Science Foundation
4201 Wilson Boulevard
Arlington, Virginia 22230, USA
Tel: 703-292-5111
FIRS: 800-877-8339
TDD: 703-292-5090

Figure 69: File is Ready for Proofreading Screen

3. Click the **Proofread PDF** button to proofread the converted file.

A new window is opened to display the PDF file. If a new window does not open, please refer to section 13 to disable popup blockers and enable java script.

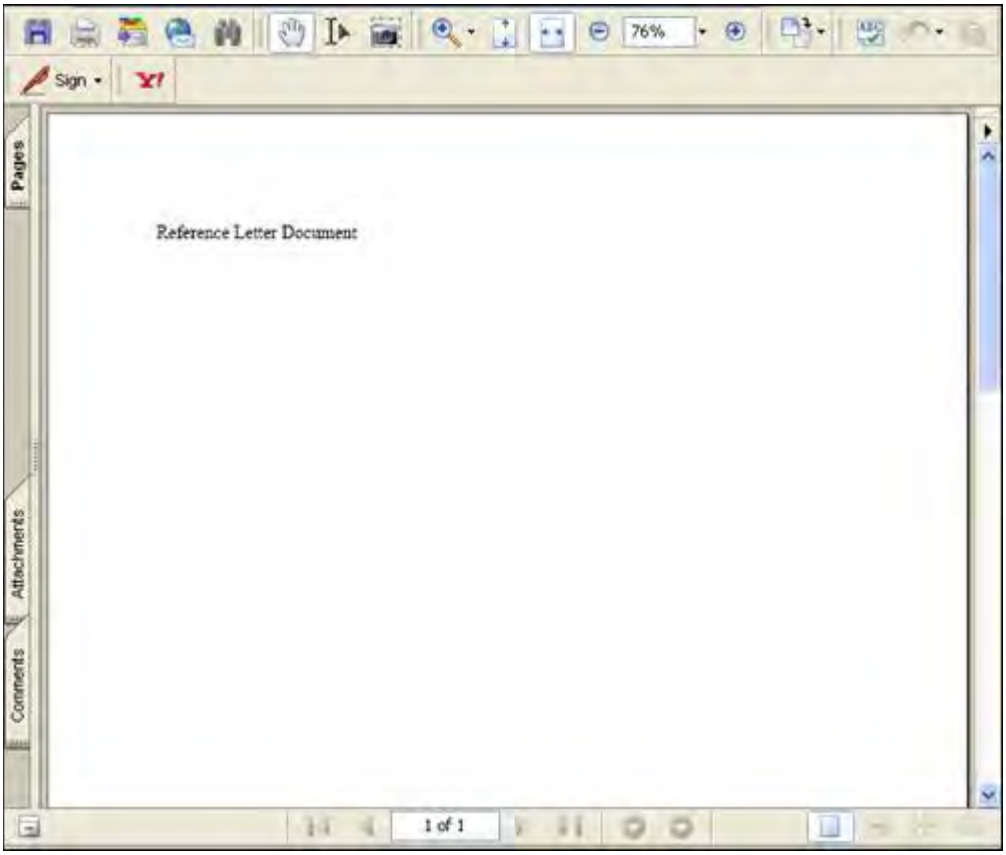


Figure 70: Write Letter of Reference Section

NOTE: If you are unable to view and proofread your reference letter during the upload process, go ahead and click the "Accept" button. You will have the option to view and proofread your document from the Submit Reference Letter homepage after your letter has been uploaded. If you detect any problems while proofreading, delete and re-upload the correct version of your reference letter.

Reference writers are advised to submit letters early to avoid FastLane system delays on the deadline date. Please be careful about deleting and uploading letters close to the deadline time as the Fastlane system will close at 8:00 pm.

4. Proofread the PDF paying special attention to check that all figures, graphics, tables, margins, page breaks, and other special formatting options have been accurately preserved

The Proofreading Complete screen is displayed.

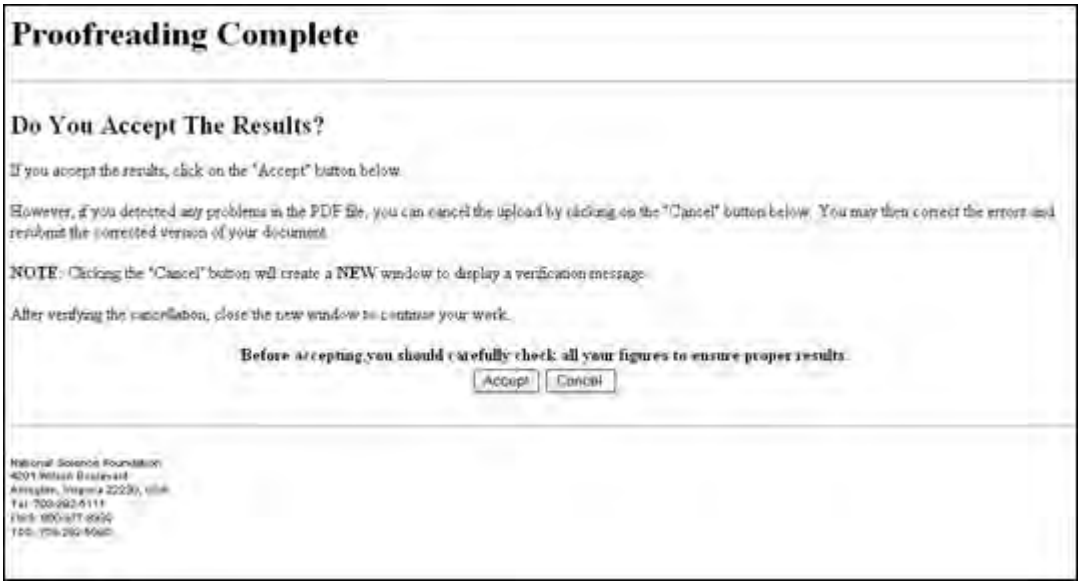


Figure 71: File is Ready for Proofreading Screen

5. Click the **Accept** button to accept the converted PDF file (However, if you detect any problems in the PDF file, you may cancel the upload by clicking on the Cancel button. The referee may then correct the errors and resubmit the corrected version of his/her document.).

   Once you have uploaded and accepted your letter of reference, the uploaded version of the reference letter will be saved and submitted to the National Science Foundation servers.

6. The Submit Reference Letter Confirmation Screen will display stating that the reference letter was successfully submitted

Figure 72: Submit Letter of Reference Screen

NOTE: If the submission of the reference letter was successful, the referee will receive a confirmation e-mail message within the same day. Also, if the referee logs back into FastLane and the letter of reference was successfully submitted, a note will be displayed at the top of the screen stating the date and time it was submitted. Additionally, applicants can check the status of each reference letter by logging into FastLane and clicking the Manage References link.

Viewing a Submitted Letter of Reference

A reference writer can view a submitted letter of reference at any point prior to the reference letter deadline by selecting the “Submit Reference Letter” link on the GRFP homepage, and logging in as a reference writer. If the reference letter submission deadline has not yet passed, the reference writer will receive the option to delete the submitted letter of reference and submit a new version. For 90 days after the reference letter submission deadline, the reference writer will still be able to view the submitted letters of reference for the current application period by logging in through the “View Reference Letter” link on the GRFP homepage, but will no longer be able to delete and/or submit letters of reference.

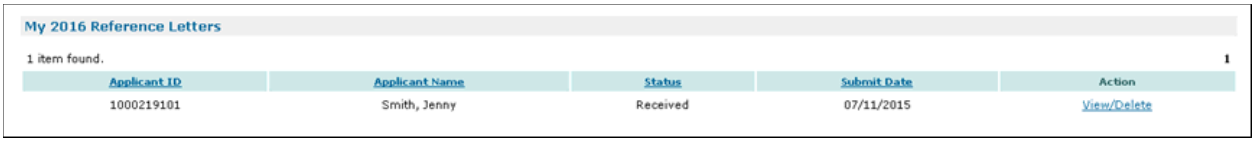


Figure 73: Reference Letter List

To View a Submitted Letter of Reference:

1. Select the **View/Delete** link in the appropriate applicant row in the Reference Letter List.

The View Reference Letter screen is displayed.

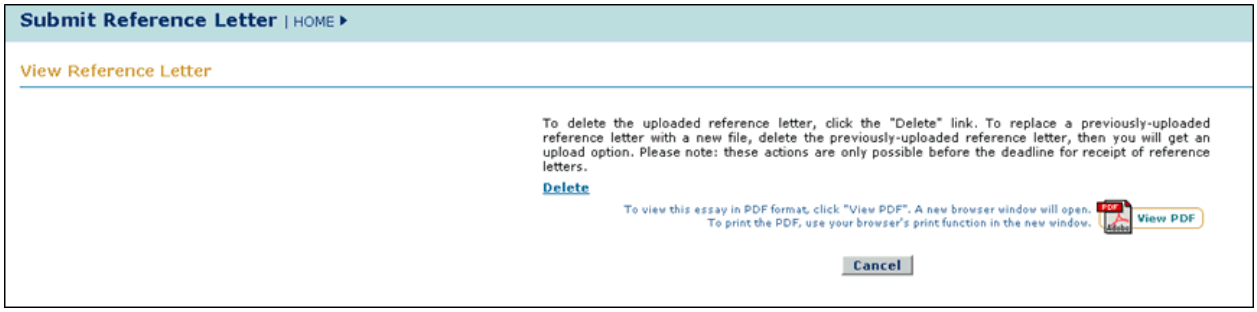


Figure 74: View Reference Letter Screen

2. Click the **View PDF** icon to view the submitted letter of reference.
3. Click the **Cancel** button to return to the Reference Writer Homepage.

Deleting a Submitted Letter of Reference

If you are unsatisfied with the submitted letter of reference, and would like to submit a new letter of reference before the reference letter deadline, you may delete the submitted letter and submit a new letter of reference.

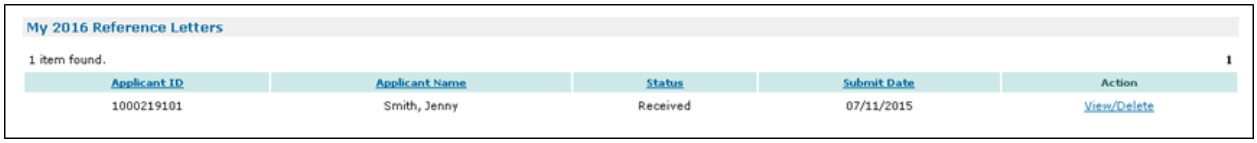


Figure 75: Reference Letter List

NOTE: Submitted reference letters cannot be deleted once the reference letter deadline has passed.

To Delete a Submitted Letter of Reference:

1. Select the **View/Delete** link in the appropriate applicant row in the Reference Letter List.

The View Reference Letter screen is displayed.

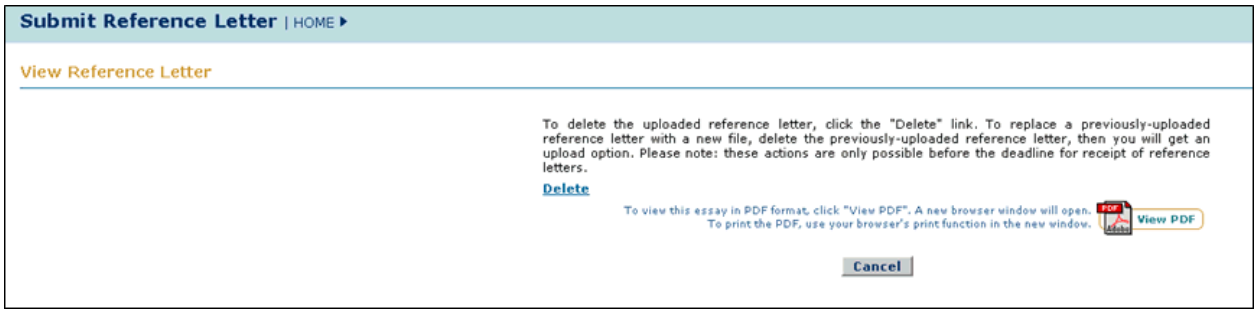


Figure 76: View Reference Letter Screen

2. Select the **Delete** link to delete the current submitted version of the letter of reference

The Delete Reference Letter Confirmation Page will display asking you to confirm that you would like to delete the submitted letter.

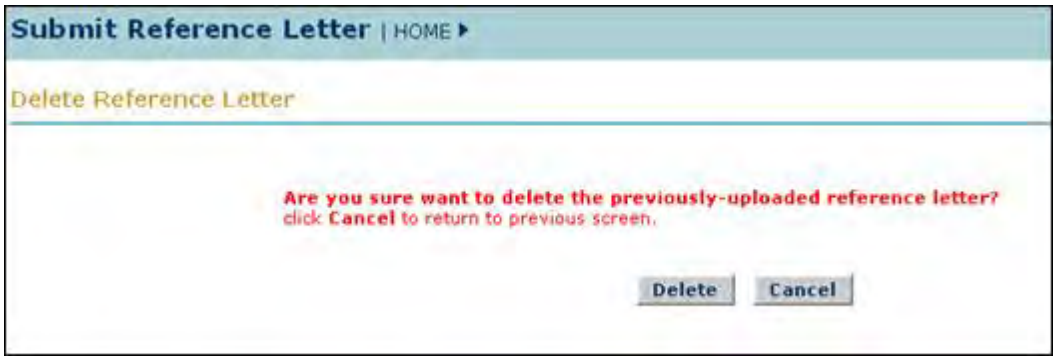


Figure 77: Delete Reference Letter Confirmation Page

WARNING: The status of this reference letter will go back to unsubmitted if you chose to delete this letter, and you will need to begin the reference letter submission process again for this applicant.

3. If you are sure you want to delete the previously-uploaded reference letter, click the **Delete** button.

The Reference Letter Deleted Confirmation Page is displayed.

Figure 78: Reference Letter Deleted Confirmation Page

You may return to the Reference Writer homepage by selecting the **Reference Home Page** link.
The status of the reference letter for this applicant will now be "Unsubmitted". You may begin to submit a new letter of reference for this applicant by selecting the **Submit** link in the Action column of the corresponding applicant's record.

Changing Browser Settings for Statement Upload

Changing Browser Settings for Statement Upload

In order to complete the statement upload process, the browser that you are using must allow Java Script to be run, and must allow popup windows to display. Please refer to the following instructions for how to disable popup blockers and how to enable Java Script in some of the most popularly used Windows and Mac browsers.

MS Windows Environment

The following instructions provide direction on how to change browser settings in FireFox Version 2 and IE 6.0 in the Windows Environment.
FireFox Version 2: How to enable Java Script and disable pop-up blockers
To enable Java Script

1. Open a FireFox browser window.
2. Click **'Tools'** from the FireFox browser menu options.
3. Select **'Options'**, an 'Options' Window is displayed.
4. Click **'Content'** image tab at the top.
5. Select **'Enable JavaScript'**.
6. Click **'OK'** in 'Content' tab of 'Option' window.

Try one of the two following ways to allow 'pop-up windows':

1. Global:
   a. Open a FireFox browser window.
   b. Click **'Tools'** from the FireFox browser menu options.
   c. Select **'Options'**, an 'Options' Window is displayed.

d. Click **'Content'** image tab at the top.

e. Deselect **'Block pop-up windows'**.

f. Click 'OK' in 'Content' tab of ‘Option' window.

2. Site specific:

a. Open a FireFox browser window.

b. Click **'Tools'** from the FireFox browser menu options.

c. Select **'Options'**, an 'Options' Window is displayed.

d. Click **'Content'** image tab at the top.

e. Select **'Block pop-up windows'**, then click **'Exceptions'** next to 'Block pop-up windows'.

f. At ‘Allowed Sites – Pop-ups’ window, add 'www.fastlane.nsf.gov' in the 'Address of web site' field, then click Allow button, then click 'Close' to close this window.

g. Click **'OK'** in 'Content' tab of ‘Option' window.

Internet Explorer 6.0: How to set Security at medium level and disable pop-up blockers

To set Security at medium level

1. Open an Internet Explorer browser window.
2. Click **'Tools'** from the Internet browser menu options.
3. Select **'Internet Options'**, an 'Internet Options' Window is displayed.
4. Click **'Security'** tab at the top.
5. Select **'Trusted sites'** Web content zone.
6. Click **'Sites'** button, and the 'Trusted Sites' window is displayed
7. Add 'www.fastlane.nsf.gov' in the 'Address of web site' field
8. Click **‘OK'** button to close this window.

To allow Pop-Up Window for our site:

1. Open an Internet Explorer browser window.
2. Click **'Tools'** from the Internet browser menu options.
3. Select **'Internet Options'**, an 'Internet Options' Window is displayed.
4. Click **'Privacy'** tab at the top.
5. Select **'Block pop-ups'**, then click 'Settings' next to it.

6. Type 'www.fastlane.nsf.gov' in the 'Address of web site' field.
7. Click the **Add** button to add this address to the list of trusted sites.
8. Click the **'Close'** button to close this window.

Mac Environment

The following instructions provide direction on how to change browser settings in Safari, FireFox, and IE in the Mac Environment.

NOTE: Below information is gathered from a MAC O.S. v.10.2.8)

Safari: How to enable Java Script and disable pop-up blockers

1. Open a Safari browser window. The Safari Application Menu is displayed at the top of the window.
2. Click **Safari** then select **Preferences** option
3. Select the **Security** Tab in the Preferences Window.
4. Select the 'Enable Java Script' option.
5. Save the change. The Safari Application Menu is displayed at the top of the window.
6. Click Safari then de-select **"Block Pop-Up Windows"** option when they work with our site.

FireFox: How to enable java script and allow pop-up windows

7. Open a FireFox Browser. The FireFox Application Menu is displayed at the top of the window.
8. Click **FireFox** then select the Preferences option. The Preferences Window displays.
9. Select the **Content** Tab.
10. Select **'Enable Java Script'** option.
11. If you choose to select the **'Block pop-up windows'** option, then you must add fastlane.nsf.gov to the list of Allowed Sites.
12. Click **'Exceptions'** next to 'Block pop-up windows' . The 'Allowed Sites – Popups' window displays.
13. Add 'www.fastlane.nsf.gov' in the 'Address of web site' field
14. Click **Allow** button to add FastLane to the list of allowable sites.
15. Click the **'Close'** button to save and close the window.

Opera: How to enable java script and disable pop-up window blockers

Two ways to configure site preferences:

1. Using ‘Quick Preference’ option

   a. Open an Opera Browser window. The Opera Application Menu is displayed at the top of the window.

   b. Click **Opera** then select Quick Preferences option.

   c. Select **‘Enable JavaScript’** and select **‘open pop-ups in background’** options.

   d. Restore above options back to user preferring options when they done with our site.

2. Using ‘Preference’ option:

   a. Open an Opera Browser window. The Opera Application Menu is displayed at the top of the window.

   b. Click **Opera** then select **Quick Preferences** option. The Preferences Window displays.

   c. Click **‘Advanced’** tab,

   d. Select the **‘Content’** option on the first item of second group.

   e. Click the **‘Manage site preferences …’** button. The ‘Server manger’ window is displayed.

   f. Click **‘Add’** button to manage a new site. The ‘Site Preferences’ window is displayed.

   g. Select the **‘General’** tab.

   h. Add https://www.fastlane.nsf.gov/ in the ‘site’ field, and set the pop-up window option to ‘open pop-ups in background’.

   i. Select **‘Scripting’** tab.

   j. Select **‘Enable JavaScript’**.

   k. Click **‘OK’** to save data.

   l. Click **‘Close’** button on the ‘Server manager’ window.

Internet Explorer: How to change preferences

Two ways to configure site preferences:

1. Configure security zone using ‘Preference’ option:

   a. Open an IE Browser window. The Explorer Application Menu is displayed at the top of the window.

   b. Click **Explorer** then select the **Preferences** option. The Preferences window displays.

c. Select the **'Security Zones'** option.

d. Click **'Add Sites.'**

e. Add https://www.fastlane.nsf.gov in the 'Address of web site' field, then click Allow button, then click 'Close' to close this window.

f. Click **'OK'** to add FastLane as a trusted site.

2. Enable JavaScript using 'Preference' option:

a. Open an IE Browser window. The Explorer Application Menu is displayed at the top of the window.

b. Click **Explorer** then select the Preferences option. The Preferences window displays.

c. Select the **'Web Content'** option.

d. In the **'Active Content'** section, check the 'Enable Scripting' option.

NSF Administrator User Guide

NSF Administrator User Guide

Understanding Your Task List

Your task list area has two different sections. The left hand side of the list contains tasks that are pending your approval or that are currently due. These actions include approving tenure requests, approving travel requests, certifying awards, processing payment enrollments, generating grants roster reports, and approving Program Expense Reports. The right hand side of the task list contains features that you may use and access at anytime. This functionality includes system administration features, viewing fellows reports, viewing analytical reports, and viewing/updating fellow information.

Figure 1: Admin Task List Screen

The list of all possible tasks that may appear in your task list and a description of each is described below:

Feature	Description
Approve Fellowship Status Requests	The Approve Fellowship Status Requests task must be completed each time a fellow has submitted a tenure, organization, or field of study change request that requires your approval. The number of requests pending your approval is displayed next to the task.

Approve/Disapprove Travel Requests	The Approve Travel Requests task must be completed each time a fellow has submitted a travel request that requires your approval. The number of requests pending your approval is displayed next to the task. Travel Requests are no longer permitted as of the 2011 - 2012 Fellowship year.
Verify Fellows Abroad Enrollment	The Verify Fellows Abroad Enrollment task enables the Administrator to verify that the requesting fellow is enrolled at an institution abroad. Verification will come from the fellow's institution's bursar's office in the form of an email or other correspondence. The number of fellows requiring enrollment verification is displayed next to the task.
View/Process Fellows Abroad	The View/Process Fellows Abroad task enables the Administrator to View/Process the Fellows Abroad Starting Certificates, Payment Enrollment Forms, Termination Certificates and Travel Certificates. The number of certificates/forms that require processing is displayed next to the task.
Approve/Disapprove Program Expense Reports	The Approve Program Expense Reports task must be completed when a CO submits an adjusted Program Expense Report for your approval. This module allows you to review the original and the adjusted report and then to approve or disapprove the report. The number of requests pending processing is displayed next to the task. You may also use this module to view previous year Program Expense Reports.
Approve/Disapprove Grants Roster Reports	The Approve Grants Roster Reports task must be completed when a CO submits a Grants Roster Report for your approval. This module allows you to review the original and the adjusted report and then to approve or return the report with adjustments. The number of requests pending processing is displayed next to the task. Grant Roster reports are no longer submitted as of June 2011.
System Administration	The System Administration area contains multiple capabilities, including the ability to manage costs, administer email notifications, and manage task dates. This functionality is available at all times.
View Fellowship Year Fellows Report	The View Fellowship Year Fellows Report task is available at all times. This task allows you to view a current Report of all fellows at an Organization for the current fellowship year.

View Analytical Reports	The View Analytical Reports task allows you to view various reports for the GRFP program including activity report statistics and statistical fellow reports and also to generate ad-hoc reports. The fellow reports that are included in this area are the Award Acceptance and Decline Report, the Fellowship Status Plans Declaration Report, the WENGS/WICS Report, the Organization Report, the Fellowship Status Report, the Fellow Abroad Report, and the Retiree Report.
View/Edit Fellow Information	The View/Edit Fellow Information task is available at all times. This task allows you to view/edit information on all GRFP fellows. You may use this feature to view the fellow's profile, tenure records, previous tenure change requests, and previous travel requests. You may also use this area to make changes to the fellow's information.
View Award Certification Forms	The View Award Certification Forms task is available at all times in your General Administrative task list. This task allows you to view the Award Certifications that were accepted by the awardees for a specific fellowship year.
Edit Applications	The Edit Applications task is available at all times. This task allows you to edit an application regardless of the application's status (submitted or unsubmitted).
View Program Expense Reports	The View Program Expense Reports link allows is available at all times. This task allows you to search for and view Program Expense Reports submitted by GRFP Officials. This task allows you to view the version history of submitted Program Expense Reports.
Track CO Activities	The Track CO Activities task is available at all times. This task allows you to view reports of requests pending CO approval.
View Grants Roster Report	The View Grants Roster Report task is available at all times. This task allows you to view the current Grants Roster Reports for any Organization as well as historical Grants Roster Reports beginning with the 2008-2009 Fellowship Year.
View/Edit Award Financial Summary	The View/Edit Award Financial Summary module allows you to view the Award Financial Summary for a given institution for the current Year and up to the past three active or expired awards. From this view you will be able to view real-time Financial Summary information and submit Program Office Adjustments.
Upload Applicant References	The Upload Applicant References task is available at all times. This task allows you to upload a Referee's Reference Letter for an applicant.

View Application Change Log	The View Application Change Log task is available at all times. This task allows you to view the applicant's application change log.
View Application and Package Status	The View Application and Package Status task is available at all times. This task allows you to view application package status and to view/print applications from the current application year (including uploaded letters of reference). This task also allows you to view/print submitted applications from previous application years.

Managing Fellowship Status Requests

Managing Fellowship Status Requests

Fellows may submit tenure change requests for their current year's tenure at any time during the year. Fellows may also request tenure changes while they are accepting their award or declaring their tenure plans for the next year. A tenure request includes changes to the fellow's organization, field of study, or Fellowship Status. When a fellow submits a tenure request, you will be required to approve or disapprove the request. You also have the ability to request more information on the request, if needed.
Once a fellow's request has been submitted and approved by his/her CO (if applicable), you will be notified via email that a request has been submitted for your approval. After receiving the email notification, you may log into the GRFP System to review and take action on the request. Your task list will display the number of tenure requests pending your approval next to the **Approve Fellowship Status Request** link.

Figure 2: Approve Fellowship Status Requests Link

Approving Fellowship Status Change Requests

When you select to approve tenure change requests, a list of all pending requests is displayed. Once you select a request to approve, the details of the request will be displayed and you will have the option to approve the request, disapprove the request, or request more information.

Figure 3: Fellowship Status Change Request Details

When you adjust/approve a request, you will be asked to adjust the fellow's tenure records to reflect the changes that are approved. Depending on the type of tenure change you are approving, you will need to either edit the current year's Fellowship Status record for the fellow or add a new Fellowship Status record for the fellow by pressing the **Add New Tenure Record** button or pressing the **Edit** link.

NOTE: Selecting the Fellow ID link in the Current Fellow Status bar will open a new browser window displaying the Fellow's detailed Fellowship Status record. You may view and edit historical tenure information from the Fellow's detailed Fellowship Status record.

Figure 4: Tenure Adjustment Screen

NOTE: A new Fellowship Status record cannot be created for an awardee until the awardee has accepted their award.

The Approve Tenure Change Screen appears below. You are able to modify all of the fields in the Fellowship Status record.

Figure 5: Approve Tenure Change

The table below describes the process for adjusting tenure records for each type of tenure changes request.

Type of Change	Adjustment
Organization	Add a new Fellowship Status record for the current year with the new organization. The current Fellowship Status record for the previous organization should be edited to reflect the change to the months of tenure at that organization and the costs associated with attending that organization.
Fellowship Year	Edit the fellow's current year Fellowship Status record to reflect the new field of study.
Field of Study Change	Add a new Fellowship Status record with the new field of study and the Fellowship Status that the fellow has requested for the next year.
Fellowship Status	Edit the current Fellowship Status record to reflect the change in Fellowship Status. The specifics of how to change the Fellowship Status record details are at the discretion of NSF (i.e. how many months on tenure, costs, etc.)
Status Start Date	Add the date where the Fellowship Status becomes effective (DD/MM/YYY).
Fellowship Year Start	Choose the tenure start type (Fall or Summer).
End Month	Choose the month in which the fellow's Fellowship Status changed.
Months on Tenure	Enter the number of months that the fellow was on tenure prior to the Fellowship Status change for the current year.

Months on Reserve	Enter the number of months that the fellow will be on or has been on Reserve.
Months Forfeited	Enter the number of months that the fellow will forfeit once his/her Fellowship Status changes.
Reserve Verified	Choose Yes or No to indicate whether or not the fellows reserve was verified.
Satisfactory Rating	Choose Yes, No, or Not Rated to indicate whether or not the fellow had received a Satisfactory Rating.
Stipend Used	Enter the Stipend Amount used by the fellow prior to his/her Fellowship Status change.
COE Used	Enter the COE Amount used by the fellow prior to his/her Fellowship Status change.
Travel Used	Enter the Travel Amount used by the fellow prior to his/her Fellowship Status change. Note, Travel Requests were no longer permitted as of the 2011 - 2012 fellowship year.
Comments	Enter any comments that you feel are appropriate to the adjustment/addition to the fellow's Fellowship Status record.

Once you have made the appropriate adjustments to the fellow's Fellowship Status record(s), you may complete the approval of the request. After you have approved the request, it is no longer available in your pending request list. In addition, an email will be sent to the fellow indicating that the request has been approved and the changes will be reflected in his/her tenure details.

Disapproving Fellowship Status Requests

In some cases, it may be necessary to disapprove a change a fellow has requested. If you select to disapprove the tenure change request, the system will prompt you to enter a disapproval reason.

Figure 6: Disapprove Tenure Change Request Screen

Once you have entered the disapproval reason, an email will be sent to the fellow and COs (when applicable) alerting them that the change request has been disapproved and the reason for the disapproval. After the request has been disapproved, it is no longer available in your pending requests list.

Requesting More Information on Fellowship Status Requests

If a fellow did not enter enough information for you to approve the change request or if you have questions regarding the change request, you may ask for more information from the fellow. When you select to request more information, the system will prompt you to enter the information request. It is recommended that in addition to the request, you also provide the fellow with the contact information he/she should send the response to (i.e. your phone number, email address, or other contact method).

Once you have submitted the information request, an email will be sent to the fellow. The fellow's change request will still be available in your pending requests list until you choose to approve or disapprove the request.

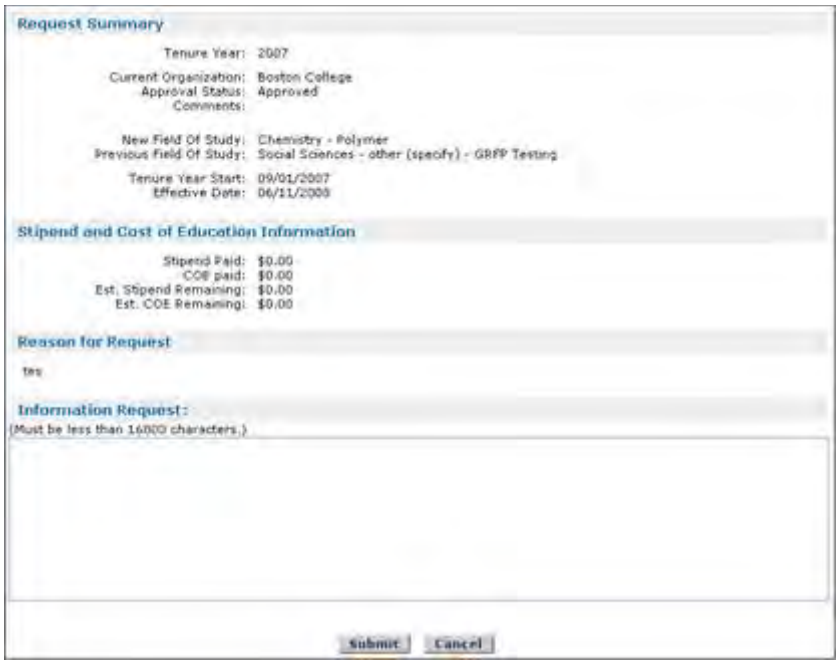


Figure 7: Requesting More Information Screen

Managing Additional Funding Opportunities Requests

Managing Additional Funding Opportunities Requests

Starting with the 2013-2014 fellowship year, Fellows can submit requests for additional funding opportunities. When a fellow submits an additional funding opportunity request, you will be required to approve or disapprove the request. Additional funding opportunity requests submitted by fellows are first sent to COs for approval before being forwarded to NSF for approval. These items will be available in your task list once the CO has approved the request. Your task list will display the number of funding opportunities requests pending your approval next to the **Approve Additoinal Funding Opportunities Request** link.

Figure 8: Approve Additional Funding Opportunities Request Link

Approving Additional Funding Opportunities Requests

When you select to approve Additional Funding Opportunities Requests, a list of all pending requests is displayed. Once you select a request to approve, the details of the request will be displayed.

Figure 9: Approve Additional Funding Opportunities Request Screen

Once you have reviewed and approved the request, an email will be sent to the fellow and the fellow's Coordinating Officials informing them that the additional funding opportunities request has been approved. The fellow's record will also be updated to indicate that he/she has used received the additional funding opportunity. After you have approved the request, it will no longer appear in your pending requests list.

Note: Selecting the Fellow ID link will open a new browser window displaying the Fellow's detailed Fellowship Status record. You may view and edit historical tenure information from the Fellow's detailed Fellowship Status record.

Disapproving Additional Funding Opportunities Requests

In some cases, it may be necessary to disapprove an additional funding opportunities request that a fellow has submitted. If you select to disapprove the request, the system will prompt you to enter a disapproval reason. Once you have entered the disapproval reason, an email will be sent to the fellow alerting him/her that the request has been disapproved and the reason for the disapproval. After the request has been disapproved, it is no longer available in your pending requests list.

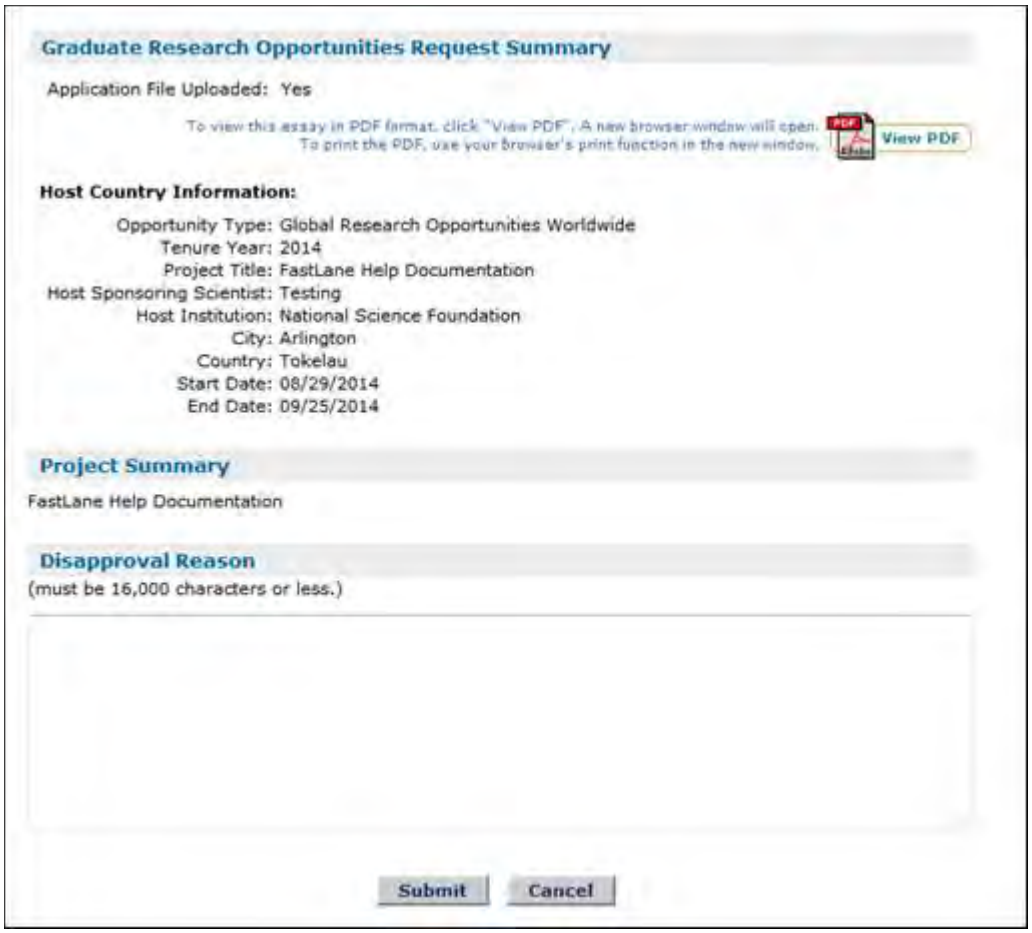


Figure 11: Disapproving Additional Funding Opportunities Request Screen

Managing Grants Roster Reports

Managing Grants Roster Reports

Prior to the 2011-2012 fellowship year, after the fellows and new awardees have declared their tenure plans, the Coordinating Officials at each Organization was able to adjust and/or submit a Grants Roster Report. Once the CO has submitted the Grants Roster report, you will need to review the report and approve or adjust fellow records and return the report. In addition, the Grants Roster report will contain an attached Financial Summary that has been verified by the CO. The financial summary details the balance of the Organization's current GRF Award as well as the cumulative expenses recorded against this Award. This information combined with projected expenses for the upcoming year (as per the Grants Roster Report) are used to calculate a Maximum Budget Request. This Maximum Budget Request is the Organization's projected need for funding for the upcoming Fellowship Year.

This functionality is available through using the **Approve Grants Roster Reports** link in your financial task list. The link also contains a number next to it which indicates the number of reports you have awaiting your approval.

PLEASE NOTE: Institutions will no longer submit the Grant Roster Report after the 2010 - 2011 Fellowship year. These functions will only be available for Grant Roster Reports submitted for the 2010 - 2011 fellowship year or prior years.

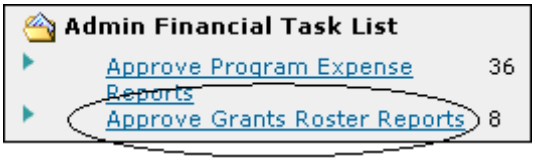


Figure 13: Approve Grants Roster Link

In addition to approving Grants Roster reports, you may also view current and previous years Grants Roster reports by selecting the **View Grants Roster Reports** link in your General Administration task list.

Figure 14: View Grants Roster Reports Link

Approving Grants Roster Reports and Financial Summaries

1. Select the **Approve Grants Roster Reports** link,

The list of reports pending your approval will be displayed.

2. Select the link next to the report you wish to view

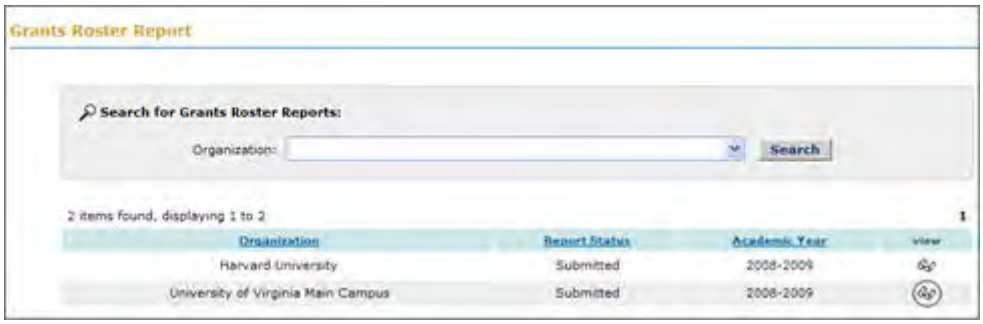


Figure 15: Approve Grants Roster Report Screen

The Grants Roster Report will display. Any fellow records that the Coordinating Official has adjusted will have a Y in the Adj column.

Adjusted Grants Roster Report

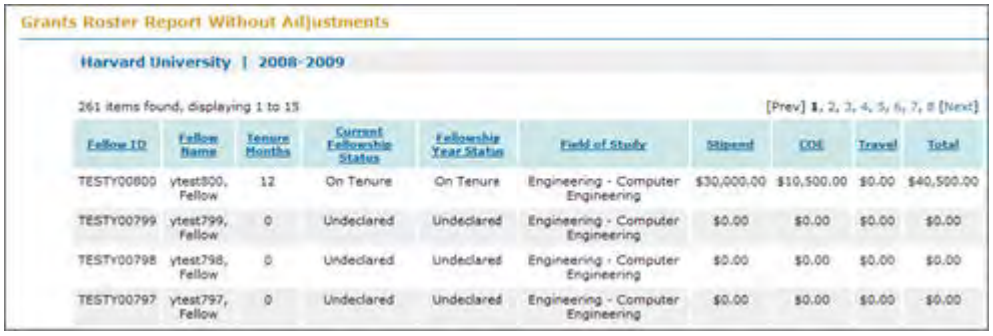
Harvard University | 2008-2009

261 items found, displaying 1 to 15 [Prev] 1, 2, 3, 4, 5, 6, 7, 8 [Next]

Fellow ID	Fellow Name	Tenure Months	Current Fellowship Status	Adj Y/N	Adj Comments	Fellowship Year Status	Field of Study	Stipend	COE	Travel	Total	Action
TESTF00020	ftest20, Fellow	11	On Tenure	Y	test - 5/4 - co	On Tenure	Engineering - Computer Engineering	$27,500.00	$9,625.00	$0.00	$37,125.00	Adjust
2004016616	Monnier, Nilah	6	On Tenure	Y	test	On Tenure	Life Sciences - Biophysics	$15,000.00	$5,250.00	$0.00	$20,250.00	Adjust
TESTF00027	ftest27, Fellow	1	Forfeited	Y	testing as admin	On Tenure	Engineering - Computer Engineering	$2,500.00	$875.00	$0.00	$3,375.00	Adjust
2003015128	Schur, Stephanie A	12	On Tenure	Y	test	On Tenure	Life Sciences - Evolutionary Biology	$30,000.00	$10,500.00	$0.00	$40,500.00	Adjust

Figure 16: Submitted Grants Roster Reports Screen

If adjustments have been made to the submitted Grants Roster Report, you may view the report without the Coordinating Official's adjustments by selecting the **View Grants Rotser Report Without Adjustments** button located at the bottom of the screen. The Grants Roster Report without the Coordinating Official's adjustments details the cost amounts based on the Fellow's saved records for the upcoming Fellowship Year.



Grants Roster Report Without Adjustments

Harvard University | 2008-2009

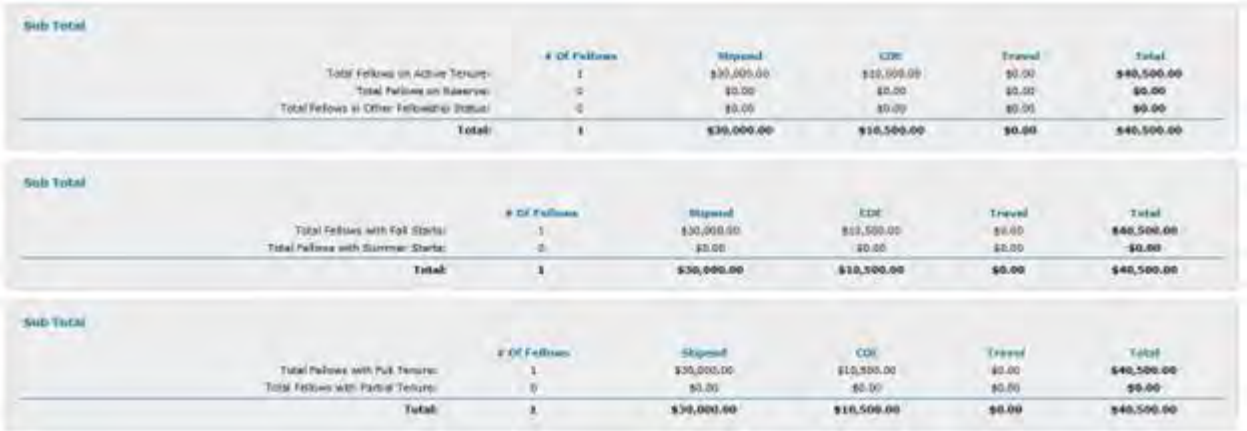
261 items found, displaying 1 to 15 [Prev] 1, 2, 3, 4, 5, 6, 7, 8 [Next]

Fellow ID	Fellow Name	Tenure Months	Current Fellowship Status	Fellowship Year Status	Field of Study	Stipend	COE	Travel	Total
TESTY00800	ytest800, Fellow	12	On Tenure	On Tenure	Engineering - Computer Engineering	$30,000.00	$10,500.00	$0.00	$40,500.00
TESTY00799	ytest799, Fellow	0	Undeclared	Undeclared	Engineering - Computer Engineering	$0.00	$0.00	$0.00	$0.00
TESTY00798	ytest798, Fellow	0	Undeclared	Undeclared	Engineering - Computer Engineering	$0.00	$0.00	$0.00	$0.00
TESTY00797	ytest797, Fellow	0	Undeclared	Undeclared	Engineering - Computer Engineering	$0.00	$0.00	$0.00	$0.00

Figure 17: Original Grants Roster Report Screen

NOTE: If an NSF Admin Official makes changes to a fellow's Fellowship Status record that has a matching adjusted record in an adjusted or submitted Grants Rotser Report, the change made by the NSF Official will override the change for this fellow that the GRFP Financial Official made in the Grants Roster Report, and the adjustment made by the GRFP Coordinating Official will be removed from the system. If the report is in Submitted status, the status will automatically be reverted to Unsubmitted so that the GRFP Coordinating Official make any necessary adjustments and resubmit the report. The count in your Approve Grants Roster Reports inbox will decrease in this case.

The subtotal section of the report contains a summary of the cost amounts that are to be paid to the organization for the next academic year. It also includes a breakout of the cost amounts to be paid to fellows on tenure and other fellowship statuses.



Sub Total

	# Of Fellows	Stipend	COE	Travel	Total
Total Fellows on Active Tenure:	1	$30,000.00	$10,500.00	$0.00	$40,500.00
Total Fellows on Reserve:	0	$0.00	$0.00	$0.00	$0.00
Total Fellows in Other Fellowship Status:	0	$0.00	$0.00	$0.00	$0.00
Total:	**1**	**$30,000.00**	**$10,500.00**	**$0.00**	**$40,500.00**

Sub Total

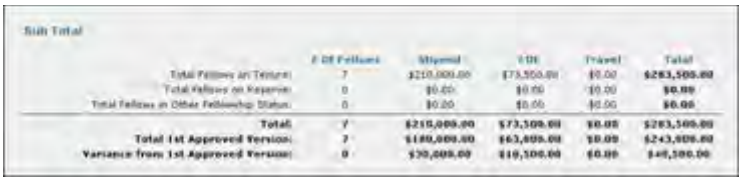
	# Of Fellows	Stipend	COE	Travel	Total
Total Fellows with Fall Starts:	1	$30,000.00	$10,500.00	$0.00	$40,500.00
Total Fellows with Summer Starts:	0	$0.00	$0.00	$0.00	$0.00
Total:	**1**	**$30,000.00**	**$10,500.00**	**$0.00**	**$40,500.00**

Sub Total

	# Of Fellows	Stipend	COE	Travel	Total
Total Fellows with Full Tenure:	1	$30,000.00	$10,500.00	$0.00	$40,500.00
Total Fellows with Partial Tenure:	0	$0.00	$0.00	$0.00	$0.00
Total:	**1**	**$30,000.00**	**$10,500.00**	**$0.00**	**$40,500.00**

Figure 18: Grants Roster Report Subtotal Box

If the Organization already has one approved Grants Roster Report, the subtotal box will display variance details from the 1st approved version of the Grants Roster report.

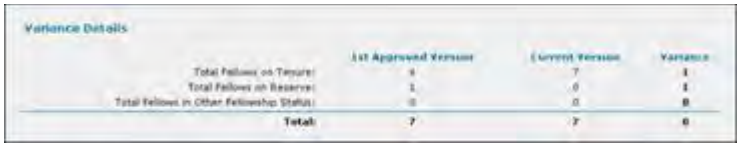


Sub Total

	# Of Fellows	Stipend	COE	Travel	Total
Total Fellows on Tenure:	7	$210,000.00	$73,500.00	$0.00	$283,500.00
Total Fellows on Reserve:	0	$0.00	$0.00	$0.00	$0.00
Total Fellows in Other Fellowship Status:	0	$0.00	$0.00	$0.00	$0.00
Total:	**7**	**$210,000.00**	**$73,500.00**	**$0.00**	**$283,500.00**
Total 1st Approved Version:	**7**	**$180,000.00**	**$63,000.00**	**$0.00**	**$243,000.00**
Variance from 1st Approved Version:	**0**	**$30,000.00**	**$10,500.00**	**$0.00**	**$40,500.00**

Figure 19: Grants Roster Report Subtotal with Variances

Additionally, a Variance Details box will display detailing the differences in fellow records from the 1st approved version to the current version of the Grants Roster Report.



Variance Details

	1st Approved Version	Current Version	Variance
Total Fellows on Tenure:	6	7	1
Total Fellows on Reserve:	1	0	1
Total Fellows in Other Fellowship Status:	0	0	0
Total:	**7**	**7**	**0**

Figure 20: Grants Roster Report Variance Details Box

Previously submitted Grant Roster reports will have a link to the Award Financial summary that was submitted as part of the award. After the 2010 - 2011 Fellowship year, the Grant Roster report and associated Award Financial Summary is not submitted to NSF.

Viewing Grants Roster Reports

To View a Grants Roster Report and its version history:

Figure 21: View Grants Roster Reports Link

1. Select the View Grants Roster Report link from your General Administration Task List.

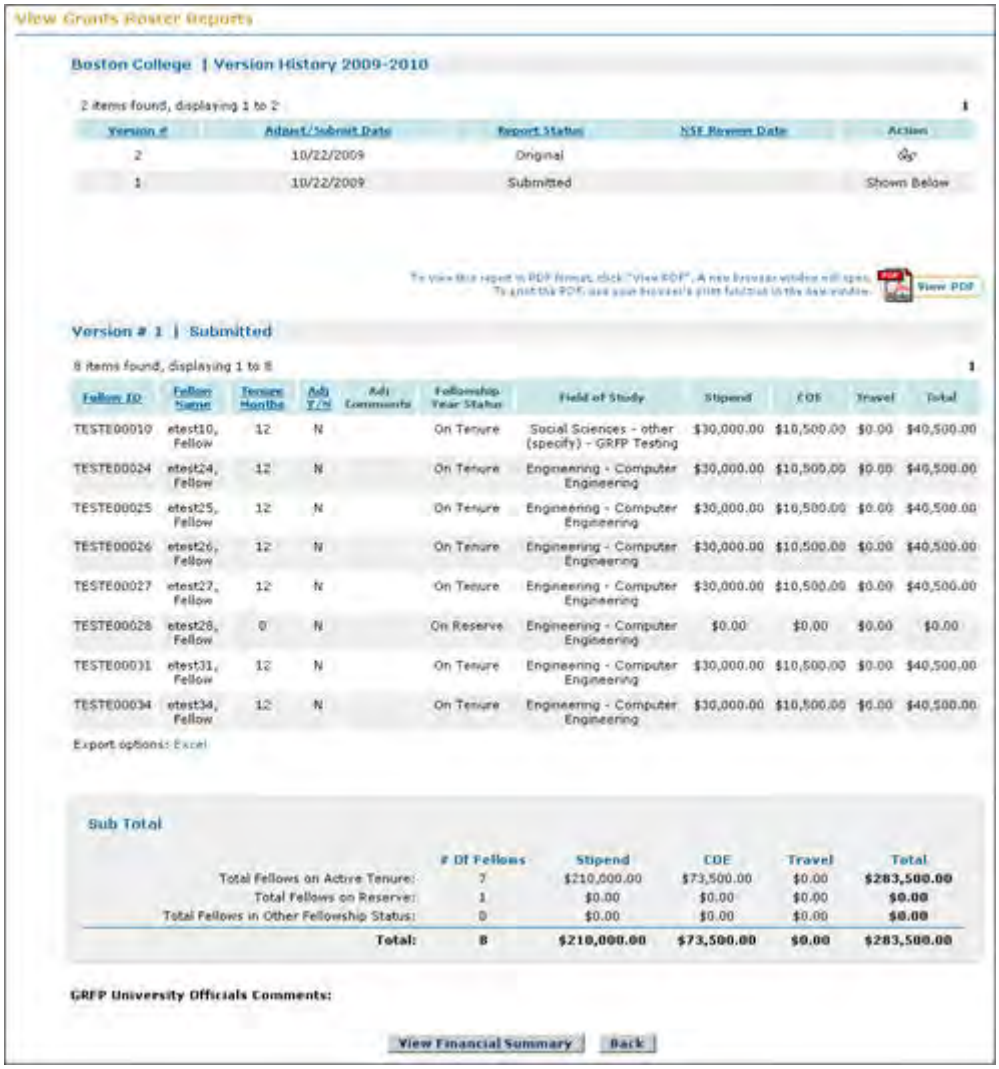
The search for Grants Roster Reports screen displays. You may search for Grants Roster Reports by Organization, Report Status or Academic Year.Note: Grants Roster reports are only available dating back to the 2008 2009 Fellowship Year. To view information on fellows prior to 2008-2009, access the relevant program Expense Reports or the View Fellow Information link.

Figure 22: Search for Grants Roster Reports Screen

2. Select the link next to the academic year's report for which you would like to see a version history.

The View Grants Roster Report screen displays. If a version history exists for the particular report, the version history is listed at the top of the page. The version history lists general report information about each version of the report: adjust/submit date, report status, NSF review date, and a link to view that particular version of the report. The details of the most current version of the report are automatically displayed below. You can toggle back and forth between the various versions of the Grants Roster report by clicking the links in the version history table to view a particular version. Report versions record individual versions of the report and the report status states whether those particular versions have been approved by NSF. Line item adjustments in an Approved version of the Grants Roster will automatically be reflected in the respective fellows' records.

3. To view the Financial Summary associated with the selected Grants Roster report version, select the View Financial Summary button



View Grants Roster Reports

Boston College | Version History 2009-2010

2 items found, displaying 1 to 2

Version #	Adjust/Submit Date	Report Status	NSF Review Date	Action
2	10/22/2009	Original		
1	10/22/2009	Submitted		Shown Below

To view this report in PDF format, click "View PDF". A new browser window will open. To print the PDF, use your browser's print function in the new window. View PDF

Version # 1 | Submitted

8 items found, displaying 1 to 8

Fellow ID	Fellow Name	Tenure Months	Adj Y/N	Adj Comments	Fellowship Year Status	Field of Study	Stipend	COE	Travel	Total
TESTE00010	etest10, Fellow	12	N		On Tenure	Social Sciences - other (specify) - GRFP Testing	$30,000.00	$10,500.00	$0.00	$40,500.00
TESTE00024	etest24, Fellow	12	N		On Tenure	Engineering - Computer Engineering	$30,000.00	$10,500.00	$0.00	$40,500.00
TESTE00025	etest25, Fellow	12	N		On Tenure	Engineering - Computer Engineering	$30,000.00	$10,500.00	$0.00	$40,500.00
TESTE00026	etest26, Fellow	12	N		On Tenure	Engineering - Computer Engineering	$30,000.00	$10,500.00	$0.00	$40,500.00
TESTE00027	etest27, Fellow	12	N		On Tenure	Engineering - Computer Engineering	$30,000.00	$10,500.00	$0.00	$40,500.00
TESTE00028	etest28, Fellow	0	N		On Reserve	Engineering - Computer Engineering	$0.00	$0.00	$0.00	$0.00
TESTE00031	etest31, Fellow	12	N		On Tenure	Engineering - Computer Engineering	$30,000.00	$10,500.00	$0.00	$40,500.00
TESTE00034	etest34, Fellow	12	N		On Tenure	Engineering - Computer Engineering	$30,000.00	$10,500.00	$0.00	$40,500.00

Export options: Excel

Sub Total

	# Of Fellows	Stipend	COE	Travel	Total
Total Fellows on Active Tenure:	7	$210,000.00	$73,500.00	$0.00	$283,500.00
Total Fellows on Reserve:	1	$0.00	$0.00	$0.00	$0.00
Total Fellows in Other Fellowship Status:	0	$0.00	$0.00	$0.00	$0.00
Total:	8	$210,000.00	$73,500.00	$0.00	$283,500.00

GRFP University Officials Comments:

View Financial Summary | Back

Figure 23: View Grants Roster Report Screen

Understanding Report Statuses

Prior to the 2011-2012, the Grant Roster Reports were submitted by the Coordinating Official. These historical reports can be in a submitted, Approved or unsubmitted status. , As of the 2011 – 2012 fellowship years, Grants Roster Reports will all be in an "Unsubmitted," and are viewable through the Admin Module.

Required Task List

- Verify Satisfactory Progress/Reserve Status
  Deadline: May 15, 2013
- Approve Tenure Request
- Approve Travel Request
- Activities Reports Not Submitted
- Adjust 2011-2012 Program Expense Report
  Closed
- Adjust/Submit 2012-2013 Fellow Completion Report

Figure 24: Understanding Report Statuses

Managing Program Expense Reports

Managing Program Expense Reports

Each year, the GRFP Coordinating Official (CO) and Financial Official (FO) at each organization submits an Program Expense Report. GRFP officials also have the ability to adjust and resubmit Program Expense Reports for the last five fiscal years. NSF has the ability to control when these reports are made available to the GRFP officials for viewing and adjustment using the Task Settings area of the System Administration module. After a GRFP CO has reviewed the report, he/she has the option to submit the report as-is or to submit the report with adjustments. All submitted reports, with or without adjustments, require review and approval by NSF before they are considered finalized.

The list of reports pending approval and the approval/disapproval functionality is available through the **Approve Program Expense Reports** link in your task list. The link also contains a number next to it that indicates the number of reports that have been submitted for your approval

Figure 30: Approve Program Expense Reports Link

NOTE: If an NSF Admin Official makes changes to a fellow's Fellowship Status record that has a matching adjusted record in an adjusted or submitted Program Expense Report, the change made by the NSF Official will override the change for this fellow that the GRFP Official made in the Program Expense Report, and the adjustment made by the GRFP Official will be removed from the system. If the report is in Submitted status, the status will automatically be reverted to Unsubmitted so that the GRFP Official make any necessary adjustments and resubmit the report. The count in your Approve Program Expense Reports inbox will decrease in this case.

Approving Program Expense Reports

When you select the **Approve Program Expense Reports** link, the list of reports pending your approval will be displayed. Once you open the report, the first screen that will be displayed is the Submitted Report screen. Any fellow records that the GRFP Official has adjusted will have a Y in the Adj column.

Submitted Program Expense Report

To view this report in PDF format, click "View PDF". A new browser window will open.
To print the PDF, use your browser's print function in the new window. View PDF

Upper Iowa University | 2007-2008

34 items found, displaying 1 to 15 [Prev] 1, 2, 3 [Next]

Fellow ID	Fellow Name	Tenure Start	Tenure Months	Adj.(Y/N)	Adj. Comments	Fellowship Year Status	Field of Study	Stipend	COE	Travel	Other	Total	Adjust
TESTZ00046	ztest46, Fellow	Fall	0	N		Forfeited	Engineering - Computer Engineering	$0.00	$0.00	$0.00	$0.00	$0.00	Adjust
TESTZ00047	ztest47, Fellow	Fall	0	N		On Medical Deferral	Engineering - Computer Engineering	$0.00	$0.00	$0.00	$0.00	$0.00	Adjust
TESTZ00045	ztest45, Fellow	Fall	0	N		On Military Deferral	Engineering - Computer Engineering	$0.00	$0.00	$0.00	$0.00	$0.00	Adjust
TESTZ00021	ztest21, Fellow	Fall	0	N		On Reserve	Engineering - Computer Engineering	$0.00	$0.00	$0.00	$0.00	$0.00	Adjust

Figure 31: Submitted Program Expense Report Screen

If adjustments have been made to the submitted Program Expense Report, you may view the report without the GRFP Coordinating Official's adjustments by selecting the **View Program Expense Report Without Adjustments** button located at the bottom of the screen. The Program Expense Report without the GRFP Coordinating Official's adjustments details the cost amounts that NSF has currently recorded in tenure records for the organization's fellows for the year.

Program Expense Report Without Adjustments

Upper Iowa University | 2007-2008

34 items found, displaying 1 to 15 [Prev] 1, 2, 3 [Next]

Fellow ID	Fellow Name	Tenure Start	Tenure Months	Fellowship Year Status	Field of Study	Stipend	COE	Travel	Other	Total
TESTZ00009	ztest9, Fellow	Fall	12	On Tenure	Mathematical Sciences - other (specify) - GRFP Testing a very long name - 123456789012345678901234567890	$30,000.00	$10,500.00	$0.00	$0.00	$40,500.00
TESTZ00010	ztest10, Fellow	Fall	12	On Tenure	Social Sciences - other (specify) - GRFP Testing	$30,000.00	$10,500.00	$0.00	$0.00	$40,500.00
TESTZ00011	ztest11, Fellow	Fall	12	On Tenure	Social Sciences - Anthropology, other (specify) - GRFP Testing	$30,000.00	$10,500.00	$0.00	$0.00	$40,500.00
TESTZ00012	ztest12, Fellow	Fall	12	On Tenure	Comp/IS/Eng - Artificial Intelligence (including Robotics, Computer vision and Human Language Processing)	$30,000.00	$10,500.00	$0.00	$0.00	$40,500.00

Figure 32: Original Program Expense Report Screen

NOTE: When GRFP Officials submit an Program Expense Report, they must sign an electronic certification certifying that the report accurately documents the dispersal of NSF funds. The electronic certification records the name of the GRFP Official and the date that the report was certified and submitted to NSF. This information can be found at the bottom of the Submitted Program Expense Report.

If adjustments have not been made to the Program Expense Report, a message at the bottom of the report will inform you that the GRFP FO submitted the report with no adjustments.

After you have reviewed the report, you may approve the report using the **Approve** button located at the bottom of the Submitted Program Expense Report Screen. Once the report has been approved, the report status will be changed to Approved. The report will be saved with the adjusted information and the fellow records will be automatically updated to reflect the adjustments made by the GRFP Coordinating Officials.

Adjusting a Program Expense Report

In some cases, you may need to make adjustments to Fellow Records in a submitted Expense Report

To make an adjustment to a Fellow record:

1. Select Adjust next to the Fellow record you wish to adjust

   The fellow's Fellowship Status, stipend, COE and travel costs are displayed in editable form

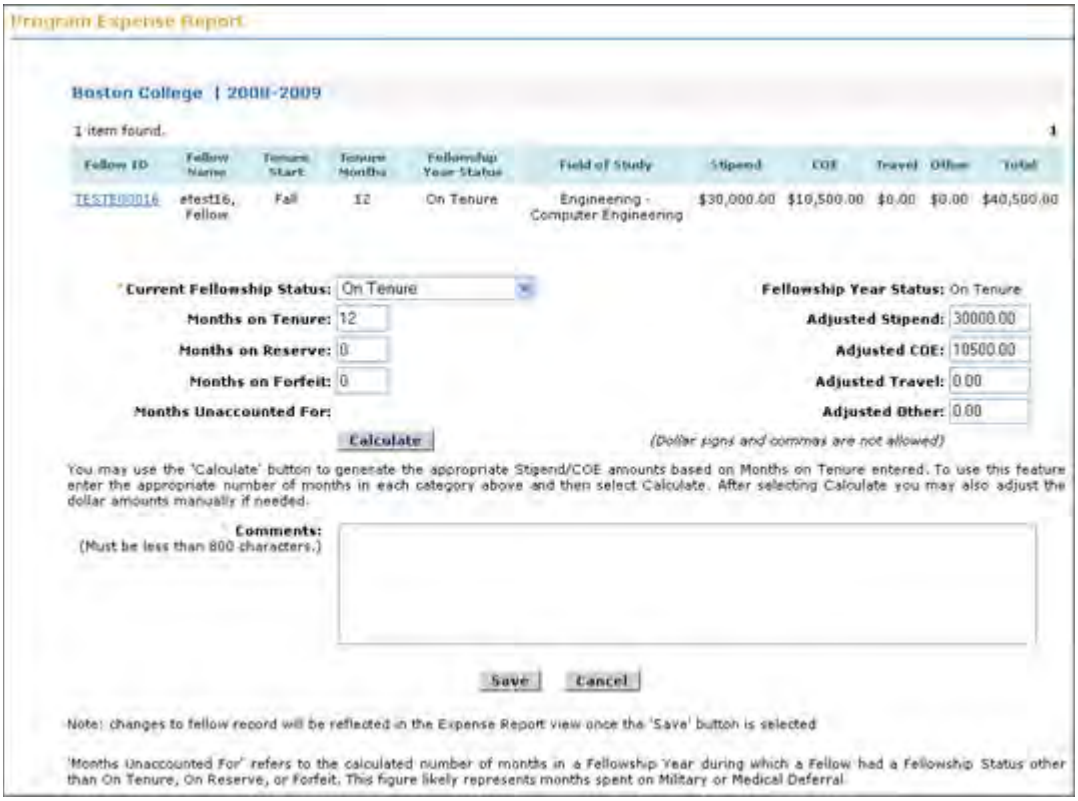


Figure 33: Adjust Fellow Record Screen (Program Expense Report)

NOTE: Selecting the Fellow ID link will open a new browser window displaying the Fellow's detailed Fellowship Status record. You may view and edit historical tenure information from the Fellow's detailed Fellowship Status record. Enter your adjustments to the Fellowship Status, stipend, COE, travel, and/or other costs and your comments regarding the adjustment.

2. If you made changes to the Fellowship Status, you have the option of selecting Calculate to calculate the appropriate stipend and COE amounts for that Fellow.

NOTE: Stipend and COE amounts are calculated using a prorated value per month. If you make changes to the calculated amounts, you will be required to enter a comment explaining the variance.

3. Click the Save button

Returning Program Expense Reports

In some cases, you may need to return Program Expense Report to the Coordinating Official.

To return a report:

1. Select the Return Report with Adjustments Button

The adjusted Program Expense Report displays with a Return Reason comments box.

2. Enter the reason for returning the report and select Submit.

The adjusted report is displayed. The adjusted fellow records are flagged with a Y in the Adj column. If you wish to view the original report without any adjustments reflected, you may click the View Program Expense Report without All Adjustments button available at the bottom of the page..

Figure 34: Return Program Expense Report Screen

An email will be sent to the GRFP Official alerting him/her that the Program Expense Report has been returned and the reason for the return. The CO will be able to view the returned report and any adjustments. The GRFP Official will be able to make the requested changes to the report and resubmit the report to NSF.

Viewing Program Expense Reports

In addition to approving/disapproving reports, you may also use the **View Program Expense Reports** link to view Program Expense Reports and associated version histories of these reports.

To view Program Expense Reports:

1. Click on the View Program Expense Reports link.

Figure 35: View Program Expense Reports Search Screen

The View Program Expense Reports Search Screen displays. You may search by any combination of the search criteria: organization, report status, and academic year. You should then choose to limit your search to either current report versions only, or all report versions. Searching current report versions only will search only the most recent version of each annual Program Expense Report. Searching all report versions will search all the report versions of each annual Program Expense Report. For example, searching for a report status of submitted for the 2005 academic year by searching current report versions only would return only those 2005 Program Expense Reports whose most recent Program Expense Report version was currently in submitted status awaiting approval.

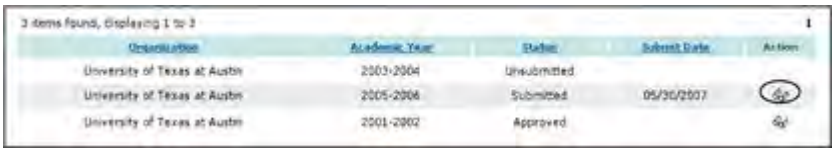


Figure 36: View Program Expense Reports Search Results

2. Click the **view** icon next to the relevant Program Expense Report once you have chosen a particular report to view.

Figure 37: View Program Expense Report Screen

The view Program Expense Report Screen displays and opens the report details of the report version that you selected from your search results. You can toggle back and forth between

report versions of this particular Program Expense Report by clicking the **action** icon for a different report version in the version history section of the page.
You can view, save, and print a PDF version of a particular version by clicking the **View PDF** icon above the report details section.

Understanding Report Versions

A new version of a Program Expense Report starts when a GRFP Official makes and saves the first line item adjustment to a fellow's record on a Program Expense Report. The life of one version ends when NSF approves or rejects the report. When/if a GRFP Official makes and saves additional adjustments to this particular year's Program Expense Report, a new version will be created for that particular year. The Original version of the report is created the first time a GRFP Official submits the Program Expense Report. The Original version is a snapshot report of the fellow's Fellowship Status record details for the particular institution and year for which the Program Expense Report was submitted before any of the GRFP Official adjustments are approved and used to adjust fellow tenure records.

Understanding Report Statuses

Prior to submission by the GRFP Official, adjusted and unadjusted Program Expense Reports are in the status of "Unsubmitted," and are not viewable through the Admin Module. If a GRFP Official has submitted a Program Expense Report with or without changes and the report is pending NSF review and approval, it will be displayed with a status of "Submitted". Program Expense Reports that have previously been reviewed and approved by NSF are displayed with a status of "Approved". When you disapprove a Program Expense Report, the report is displayed with a status of "Rejected."

View/Editing An Award Financial Summary

The View/Edit Award Financial Summary module allows you to view the Award Financial Summary for the current Grants Roster Report Year for any Organization. From this view you will be able to view real-time Financial Summary information, upload funding recommendation memos and submit Program Office Adjustments for specific academic years for each award.

To view the Award Financial Summary:

1. Click on the View/Edit Award Financial Summary link

Figure 38: View/Edit Award Financial Summary Link

The View/Edit Award Financial Summary search screen displays:

Figure 39: View/Edit Award Financial Summary Search Screen

2. You may scroll through the list of Organizations or select an Organization and select Search to locate the desired Organization.

3. Select the View/Edit link for the Financial Summary you wish to view.

   2. The View/Edit Award Financial Summary screen for that Organization is displayed:

Figure 40: View/Edit Award Financial Summary Screen

From the Award Financial Summary screen you are able to View the Institutions' Current funding needs for the current fellowship year on the Institution Summary tab and add funding recommendation memos to an institution. Additionally, any active or expired awards are displayed in tabular format.

Note: Only awards with an effective date of 2003 or later will display in the Financial Summary module. Awards with the effective date prior to 2003 will not be displayed.

The Award Financial Summary screen displays with the Institution Summary tab for the current fellowship year:

Note: The GRFP Fellowship Year begins on June 1 through May 31st. The Institution Summary funding details are reflective of the current fellowship year.

Academic Year	Action
2012-2013	

Figure 41: View Award Financial Summary Screen – Institution Summary Tab

On this screen, you are able to view the financial details of the current fellowship year with the total estimate of funding needs based on the current fellows Tenure Declaration.
At the top of the Institution Summary tab, the Summary at a Glance table provides more information on the institution:

View Award Financial Summary

Financial Summary | Boston College | 2008-2009

Current Primary Award ID:	0757737	Financial Summary Help		
Award Effective Date:	10/01/2007			
Award Expiration Date:	09/30/2012			
Cumulative Award Amount:	$81,000.00	View History		
Carryover from Other Award(s):	$100,000.00	View Other Awards	Carryover Explanation:	test
Total Amount Available:	$181,000.00			

	Program Level	Institution Level FFR Submitted as recorded in NSF FAS as of 12/31/2008	Variance
Expenses Reported: (A new browser window will open when selecting View)	$0.00 View	$74,742.00	$74,742.00
Annual Surplus/(Deficit):	$181,000.00	$106,258.00	
Projected Grants Roster Expenses:	$982,000.00 View		
Maximum Budget Request: (Projected Grants Roster Expenses +/- Surplus or Deficit from Program Level Expenses stated above)	$801,000.00	Temp Prop ID:	

Back

Figure 42: Summary at a Glance

Note: For accurate financial reporting and award recommendations, all GRFP Institutions must submit their Program Expense Report to NSF each year prior to the October deadline. If there has been a report submission, the previous year's Program Expense Report will display as a hyperlink to the report once it is approved by NSF. New GRFP Institutions will not have an Program Expense Report available until the first submission at the end of the first Fellowship Year.

Below is a listing of the Summary at a Glance fields and their descriptions:

Feature	Description
Total Active Fellows (Summary at a Glance)	This number represents the total number of fellows, regardless of status, associated to the institution.
Total Fellows On Tenure	This number represents the total number of fellows who have declared Tenure.
Total Summer Start Fellows	This represents the total number of fellows who have declared as a Summer start fellow.
Total Fellows Not Yet Declared	This value represents the number of fellows that have not declared their Fellowship Status for the current fellowship year. Funds are not allocated for Fellows who have not declared their Fellowship Status. If the total number of fellows not declared is > 0, the system will display a warning icon with more information
Program Expense Report OR Program Expense Report	This section will display a specific message based on the status of the last fellowship year program expense report. The following status may be displayed based on the current status of the previous years report: • Program Expense Report Not Submitted • Program Expense Report Submitted, not yet approved • Program Expense Report PO Rejected • Program Expense Report Not Required (New Inst. or Inst. w/o fellows from previous year) • Program Expense Report

Below is a sample screen of the Funding Details section on the Institution summary and a table with their appropriate descriptions:

FUNDING DETAILS	Amount	Fellows	Funds
* Total Fellows: 12-Month Tenure 2012 - 2013			
Stipend	$30,000.00	13	$390,000.00
Cost of Education Allowance	$12,000.00	13	$156,000.00
Subtotal Estimation of 12-Month Tenure Support Required: 2012 - 2013	—	13	$546,000.00
Total Fellows: Partial Support Tenure 2012 - 2013			
Stipend Partial Support	—	—	$0.00
Cost of Education Allowance Partial Support	—	—	$0.00
Subtotal Estimation of Partial Support Required: 2012 - 2013	—	0	$0.00
Total Fellows: Other Allowances			
Other Allowances	—	0	$0.00
Subtotal Estimation of Other Allowances Support Required: 2012 - 2013	—	0	$0.00
TOTAL ESTIMATE 2012 - 2013			$546,000.00
Unliquidated Balance from Award 0951703	—	—	($494,837.23)
Unliquidated Balance from Award 0946370	—	—	($0.00)
		Potential Recommended Funding	$91,162.77

* Fellows 12-Month Tenure are on Tenure for 12 months and are collecting full Stipend and full Cost of Education

Figure 43: Funding Details

Feature	Description
Total Fellows: 12-MonthTenure	This section details the total number of fellows and total funds for all fellows who require full tenure support. Please note, fellows in this category must be on Tenure for 12 months, and collecting full Stipend and full Cost of Education
Stipend:	This row details the total number of fellows and funds that are collecting full Stipend for the current fellowship year.
Cost of Education Allowance	This row details the total number of fellows and funds that are collecting Stipend for the current fellowship year.
Subtotal Estimation of 12-Month Tenure Support Required	This row details the total number of fellows and subtotal of funds for all fellows who require full tenure support.
Total Fellows: Partial Support Tenure	This section details the total number of fellows and total funds for all fellows who require partial tenure support. Please note, fellows in this category can either be on Tenure for less than12 months, or collecting partial Stipend or partial Cost of Education.
Stipend Partial Support:	This row details the total number of fellows and funds for those that receive partial stipend support.
Cost of Education Allowance Partial support:	This row details the total number of fellows and funds for those that receive partial cost of education allowance
Subtotal Estimation of Partial Support Required:	This row details the total number of fellows and subtotal of funds for all fellows who require partial support.
Total Fellows - Other Allowances	Total fellows and funds for fellows that require funds in support of other allowances

Other Allowances	This amount refers to fellows that may require additional funds for GRFP approved allowances.
Subtotal Estimation of Other Allowances Support Required	This row details the total number of fellows and subtotal of funds that require Other Allowance support.
Total Estimate	This amount represents the total estimated funds required to support GRFP Fellows for the current fellowship year based on the calculation of all subtotal amounts.
Unliquidated Balance	This amount represents the Institution Balance Remaining from the Award noted.
Potential Recommended Funding	This value is calculated to derive the projected institution funding to be recommended based on the current year's Tenure Declaration amount and the previous year's Institution Balance Remaining from awards noted.

Note: Fellows who receive full stipend and full COE but are on tenure for less than 12 months are categorized as Partial Support Fellows and will be accounted for in the Partial Support section of the Institution Summary.

The Financial Summary screen displays an institution's active Awardsas tabs across the top of the screen. The most recent award is named the displayed first. Each tab displays the award activities, amendment and expenses which have occurred during the period of the award. The system will calculate the Institution's Balance remaining using the funds carried over from previous awards and the award activities.
To view detailed information for a particular award, select the award tab you wish to view:

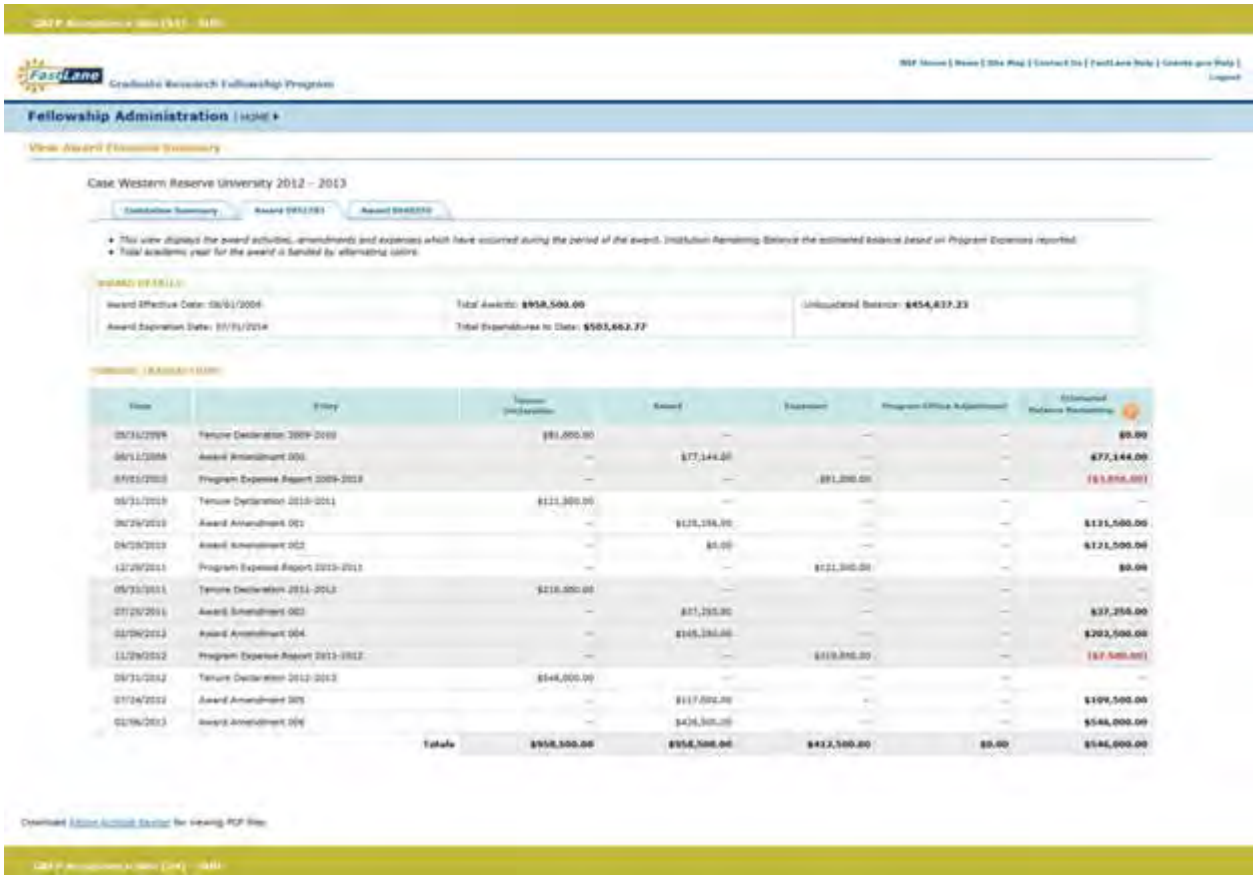


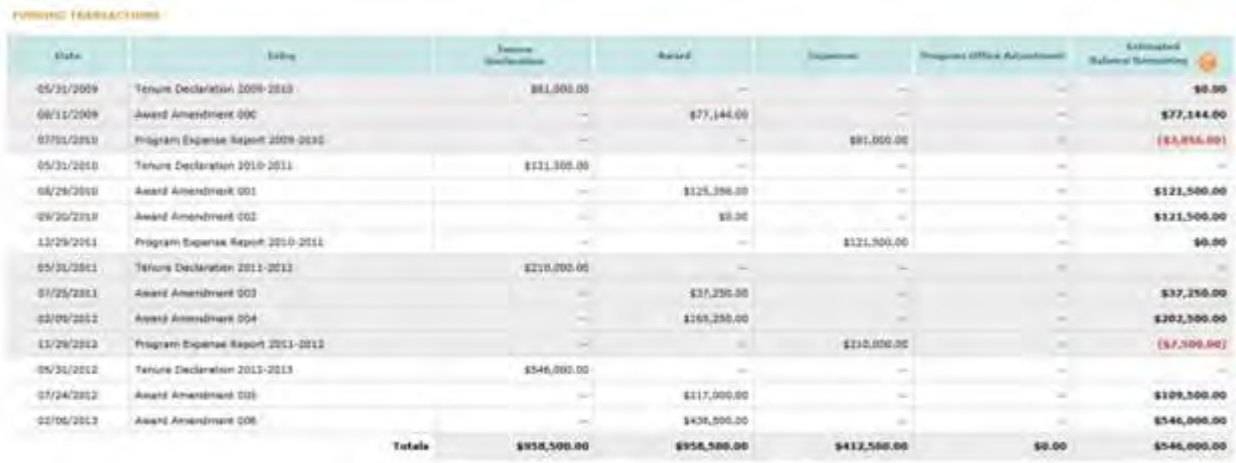
Figure 44: Primary Award Screen

At the top of each award tab, the Award Details table provides more information on the Award:

Figure 45: Award Details

Feature	Description
Award Start Date:	The effective date of the Award
Award End Date:	The expiration date of the Award
Total Awards:	Cumulative amount issued by NSF to date to the organization under the current award
Total Expenditures to Date:	Cumulative amount of total expenditures reported to NSF on the current award
Unliquidated Balance:	This is the difference between total obligations and expeditures from FAS.

Below the Award Details section, a list of the detailed funding transactions is provided in a table on the Award tab screen. The funding transactions included award activities, amendments and expenses which have occurred during the period of the Award. The Institution's Balance Remaining is calculated with the funds carried over from previous awards and the award transactions.



Date	Entry	Tenure Declaration	Award	Expenses	Program Office Adjustments	Estimated Balance Remaining
05/31/2009	Tenure Declaration 2009-2010	$81,000.00	–	–	–	$0.00
08/11/2009	Award Amendment 000	–	$77,144.00	–	–	$77,144.00
07/01/2010	Program Expense Report 2009-2010	–	–	$81,000.00	–	($3,856.00)
05/31/2010	Tenure Declaration 2010-2011	$121,500.00	–	–	–	–
08/29/2010	Award Amendment 001	–	$125,356.00	–	–	$121,500.00
09/20/2010	Award Amendment 002	–	$0.00	–	–	$121,500.00
12/29/2011	Program Expense Report 2010-2011	–	–	$121,500.00	–	$0.00
05/31/2011	Tenure Declaration 2011-2012	$210,000.00	–	–	–	–
07/25/2011	Award Amendment 003	–	$37,250.00	–	–	$37,250.00
02/09/2012	Award Amendment 004	–	$165,250.00	–	–	$202,500.00
12/29/2012	Program Expense Report 2011-2012	–	–	$210,000.00	–	($7,500.00)
05/31/2012	Tenure Declaration 2012-2013	$546,000.00	–	–	–	–
07/24/2012	Award Amendment 005	–	$117,000.00	–	–	$109,500.00
02/06/2013	Award Amendment 006	–	$436,500.00	–	–	$546,000.00
	Totals	$958,500.00	$958,500.00	$412,500.00	$0.00	$546,000.00

Figure 46: Funding Transactions

Feature	Description
Date	This is the transaction date.
Entry	This is a description of the transaction.
Program Expense Report	Fellowship expenses as reported by the Organization through the GRFP System's Program Expense Report (formerly the. Program Expense Report). Annual Institution Expenses are used to calculate the Institution's Remaining Balance. If there are Program Expense Reports that have not been submitted in the award period, the Institution Remaining Balance will be inaccurate. Reports should be submitted for the missing years to ensure an accurate budget accounting.
Tenure Declaration	Projected expenses for the upcoming fellowship year as reported on your Organization's Grants Roster Report.
Award	Each Award Amendment posted against the base award is displayed as a separate line item in the corresponding award tab.
Expenses	Expenses reported by the institution in their program expense report.
Program Office Adjustments	Miscellaneous adjustments made to institute balance by the NSF program office.

Estimated Balance Remaining	The Institution Balance Remaining reflects the current balance of funds the institution has on hand based the total awards made minus total expenditures and adjustments based on the carryover amounts from previous awards.

The Award History tab displays a historical view of an institution's Awards, including Active and Expired awards. The Total Obligations, Expenditures and Remaining Balance are shown for each award.

Figure 47: Award History Screen

Uploading Funding Recommendation Memos

The Funding Memo tab provides a link to add/upload a recommendation memo for a specified insitutution. This tab also provides ability to view any associated funding memos for each specified institution.

Funding Recommendation memos are added using the tab located on the Financial Award Summary page. Once the Funding Memos tab is selected the page displays existing Funding Memos associated to the specified institution. This page provides the following information for each institution in a table format:

- Award ID
- Funding Memo Title
- Uploaded Date
- View/Delete Action

Figure 48: Funding Memo Tab

To add a funding memo to the specified institution the user will cliclk the Add Recommendation Memo link.

Figure 49: Link to Add a Recommendation Memo

Once the Add Funding Memo link is selected the following information must be provided:

- Award ID – Drop down list of active award id's associated with the institution
- Funding Memo Label – The title or label name for the memo to be attached
- Attachment – A PDF file of the actual funding memo to be added

Figure 50: Upload a Funding Memo

Once the Save button is selected the Funding Memo page is automatically updated with the uploaded memo and the added memo information. A user can either view or delete the added memo by using the View and Delete links.

Figure 51: View / Delete a Funding Memo

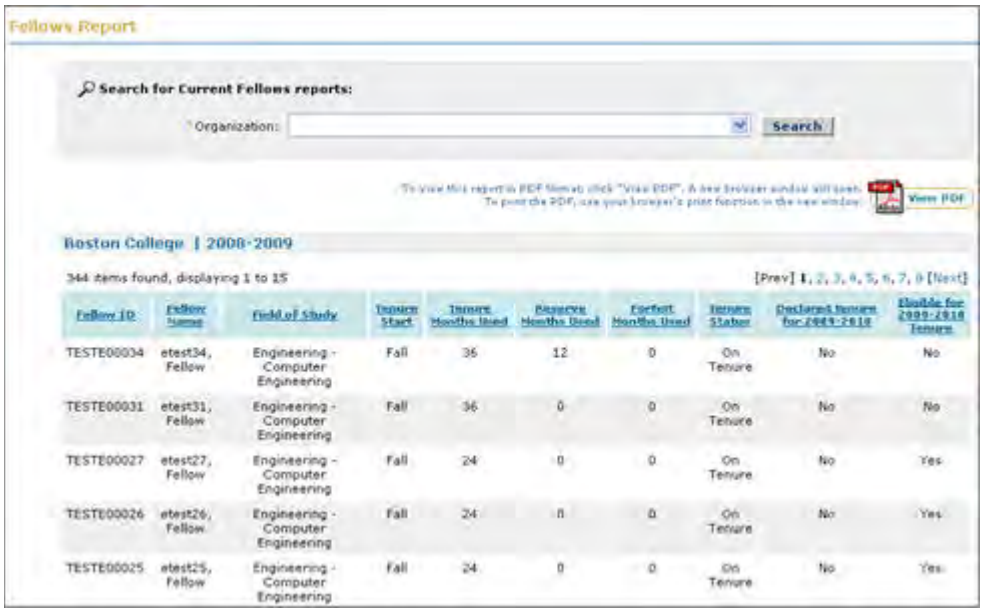
Viewing Fellowship Year Fellows report

The Fellowship Year Fellows Report module allows you to view the Fellowship Year Fellows report for an academic organization. The Fellows report details all fellows that are currently associated with the selected organization for the current fellowship year as well as each

fellow's eligibility for the next year of tenure. All changes that are made to a fellow's tenure for the current year will be reflected in this report upon approval of the changes. Each organization's report is available through the **View Fellows Report** link available in your task list.

Figure 52: View Fellowship Year Fellows Report Link

Once you have selected the **View Fellowship Year Fellows Report** link, you may select the organization and year you wish to view. After the report is displayed, you may sort the report by any of columns by clicking the column heading of that column.



Fellow ID	Fellow Name	Field of Study	Tenure Start	Tenure Months Used	Reserve Months Used	Forfeit Months Used	Tenure Status	Declared Tenure for 2009-2010	Eligible for 2009-2010 Tenure
TESTE00034	etest34, Fellow	Engineering - Computer Engineering	Fall	36	12	0	On Tenure	No	No
TESTE00031	etest31, Fellow	Engineering - Computer Engineering	Fall	36	0	0	On Tenure	No	No
TESTE00027	etest27, Fellow	Engineering - Computer Engineering	Fall	24	0	0	On Tenure	No	Yes
TESTE00026	etest26, Fellow	Engineering - Computer Engineering	Fall	24	0	0	On Tenure	No	Yes
TESTE00025	etest25, Fellow	Engineering - Computer Engineering	Fall	24	0	0	On Tenure	No	Yes

Figure 53: Fellowship Year Fellows Report

Managing Fellow Information

Managing Fellow Information

The Fellow Information module allows you to view and edit/update information for all GRFP fellows. You may use this area to update a fellow's profile and his/her tenure records. This

module can be accessed using the **View/Edit Fellow Information** link that is available in your task list.

Figure 54: View Fellow Information Link

Once you have selected the **View/Edit Fellow Information** Link, a search box will be displayed that allows you to search for a specific fellow or fellows. You may search by fellow ID, last name, first name, organization, fellow status, and/or Fellowship Status.

When you search by fellow last name, fellows who have listed the given last name as a current or previous last name will be returned.

Figure 55: Fellow Search Box

Once you have selected a fellow whose information you wish to view, there are eight tabs of information that are available for the selected fellow: Profile, Secret Questions, Fellowship Status Details, Fellowship Status History, Activities Reports, Fellowship Status Changes, Travel Requests, and Fellow Notes. A description of the information and functionality that are available in each of these tabs can be found in the sections below.

Profile

The **Profile** tab of the Fellow Information module contains a fellow's contact and demographic information. When the profile tab is accessed, the fellow's contact information is displayed in a read-only format.

Fellowship Administration | HOME

Fellow Information | MAIN

Fellow etest18 - TESTE00018

Profile | Secret Questions | Fellowship Status Details | Fellowship Status History

User Name

First Name:	Fellow
Last Name:	etest18
Middle Name:	
Previous Last Name 1:	
Previous Last Name 2:	
Prefix:	Mr
Suffix:	Jr
System Username:	etest18
ORCID Identifier:	

Mailing Contact Information

Street Address:	222 Fellow Road Unit F
City:	Alexandria
State:	VA
Zip:	22312
Email:	grfpfellow@yahoo.com
Phone Number:	3333334445
Ext:	
Country:	US
Postal Code:	

Figure 56: Fellow Information Profile Screen

The fellow's demographic information can be viewed by selecting the **View Demographic Information** link located at the bottom of the screen. The demographic information is displayed in a read-only format but can be updated by clicking the **Edit** button.

Edit Profile

You may update any of the information, except for the fellow's System Username, by clicking the **Edit** button located the bottom of the screen.

Figure ??: Edit Fellow Profile Screen

NOTE: The Fellow's Open Researcher and Contributor ID (ORCID), a 16-digit number, can be entered and updated by the Administrator.

Secret Questions

The **Secret Questions** tab of the Fellow Information module contains the secret questions and corresponding answers provided by the fellow. The secret question answered by the fellow for Retrieving their Username and their answer is displayed. Additionally, the secret questions answered by the fellow for Resetting their Password and their answer are displayed.

Figure 57: Secret Questions Tab

Fellowship Status Details

The **Fellowship Details** tab of the Fellow Information module contains all tenure records for the selected fellow. When the Fellowship Details tab is first accessed, there is a listing of the current and past tenure records for the fellow. You have the option to view, edit, or delete any of the fellow's tenure records, add a new fellowship record, or delete a Non-Active Status Record.

Figure 58: Fellow Information Fellowship Details Screen

WARNING: If a GRFP Coordinating Official has saved changes to a Program Expense Report or submitted an Program Expense Report to NSF, but NSF has not yet approved the report, it is possible that an NSF Official might modify a fellowship record for a fellow for which the GRFP Coordinating Official has submitted a modification in their Program Expense Report. If this occurs, the change made by the NSF Official will override the change for this fellow that the GRFP Coordinating Official has made in the Program Expense Report, and the adjustment the GRFP Coordinating Official made will be removed from the system. If an adjustment is removed in this way, the GRFP Coordinating Official will receive a notification email. They must then log in and view their Program Expense Report to ensure that no further adjustments are needed to this fellow's record. If the Program Expense Report was in Submitted status when this change occurred, the status of the report will automatically be reverted to Unsubmitted so that the GRFP Coordinating Official can make any necessary adjustments and resubmit the report.

Adding New Fellowship Status Records

If you select to edit or add a new fellowship record, a screen is displayed with the Fellowship Status detail fields. If you have selected to edit, these fields will be pre-populated with the current fellowship record information. The sections included in the tenure details form are the school information, tenure information, and cost information. The fields that are required for each fellowship record are flagged with an asterisk.

Figure 60: Fellow Information Add Fellowship Status Record Screen

Note: Maximum Stipend, COE and Travel amounts can not be exceeded for a given Fellowship Year. In the event that the maximum amounts are exceeded, the system will produce an error message upon selecting save.

Adding Non-Active Status Records

If you wish to add a fellowship record to indicate that a fellow has completed tenure, declined an award, or terminated his/her fellowship, you must add a non-active Fellowship Status record. When you select to add this record, a screen is displayed that allows you to select the Fellowship Status and enter an effective date for the Fellowship Status record.

Figure 61: Fellow Information Add Non-Active Fellowship Status Record

You have the option to access fellow abroad information from this tab only when the fellow

has a tenure abroad record. This is depicted by the Y under the category Abroad. Click on the **View/Edit** link to then access the **View Abroad Details** link.

Figure 62: Fellow Abroad Tenure Record

Click the **View Abroad Details** link to access the fellow's abroad details for the fellowship year. This function will allow you to view and edit the fellow's abroad starting certificate, ending certificate, and payment enrollment information.

Figure 63: Fellow Abroad Details

Fellowship Status History

The **Tenure History** tab of the Fellow Information module contains a record of all the tenure statuses that a fellow has held during their fellowship. This record includes his/her Fellowship Status, the effective date, the username of the individual the Fellowship Status was updated by, the updated date, and comments associated with the fellow's Fellowship Status.

Figure 64: Fellowship Status History Screen

Activities Reports

The **Activities Reports** tab within the Fellow Information module contains all the activities reports that the selected fellow has submitted during his/her fellowship including Additional Funding Opportunities. When the Activities Reports tab is accessed, a listing of the submitted activities reports is displayed. You may choose a report to view by selecting the **View Report** link. The full report is displayed, including the fellow's school information, summary of activities, achievements, career plans, fellowship feedback, other fellowship offers (if applicable), final fellowship summary (if applicable), and stipend feedback. If a fellow did not enter any information for a given section of his/her report, that section will be blank on your screen.

Figure 65: Fellow Information Activities Report Screen

Fellowship Status Changes

The **Tenure Changes** tab of the Fellow Information module contains a list of the changes requests that a fellow has submitted during his/her fellowship. When you access the Tenure Changes tab, a list of the change requests is displayed including the request date and status. You may click the **View** link to view the details of the request. The request details are then displayed including the request summary, change information, reason for the request, cost information, and update information.

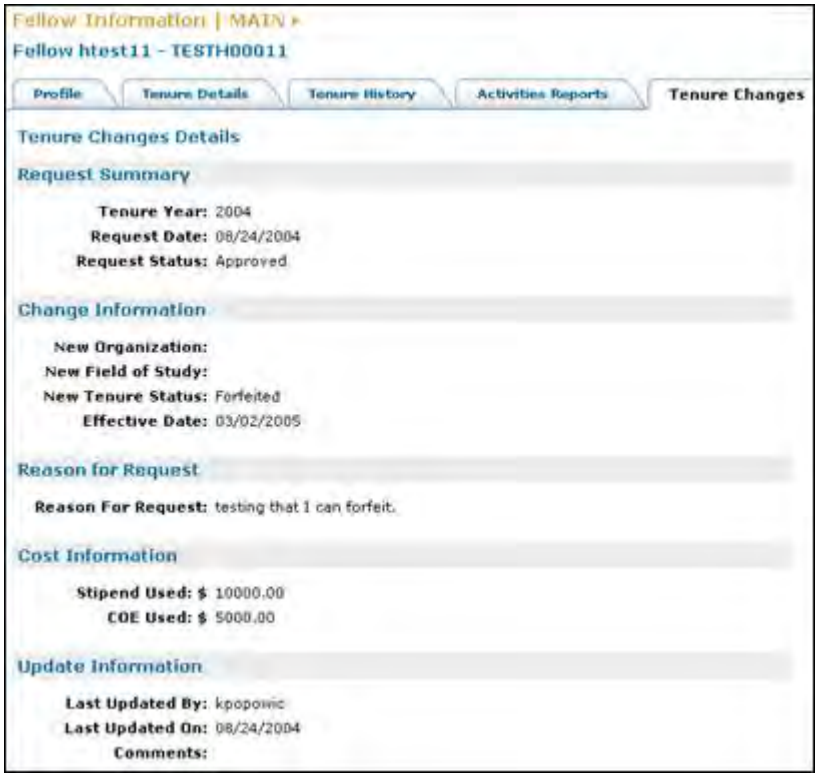


Figure 66: Fellow Information Tenure Change Request Details

Travel Requests

The **Travel Requests** tab of the Fellow Information module contains a historical list of the travel allowance requests the fellow has submitted during his/her fellowship. When you access the Travel Requests tab a list of the change requests is displayed including the request date and status. You may click the **View** link to view the details of the request. The request details are then displayed including a request summary, departure information, return information, reason for the request, and update information.

Figure 67: Fellow Information Travel Request Details

Fellow Notes

The **Fellow Notes** provides the ability to input text to record correspondence online, attach files and view the notes and attachments by date & by author. Additionally, the Program Office can retrieve all the inputted notes in a PDF format and view the entire notes log in a consolidated PDF format.

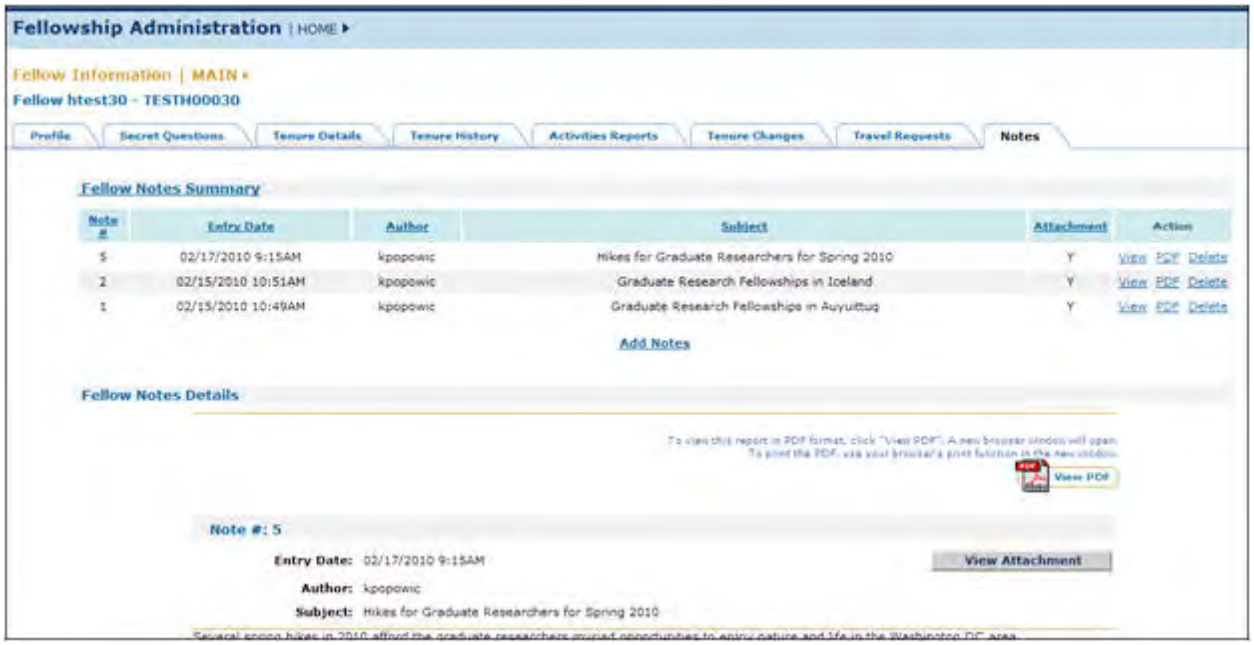


Figure 68: Fellow Information Screen

Add a Fellow Note

Select 'Add Notes' link in Fellow Notes Summary as highlighted in the below screen

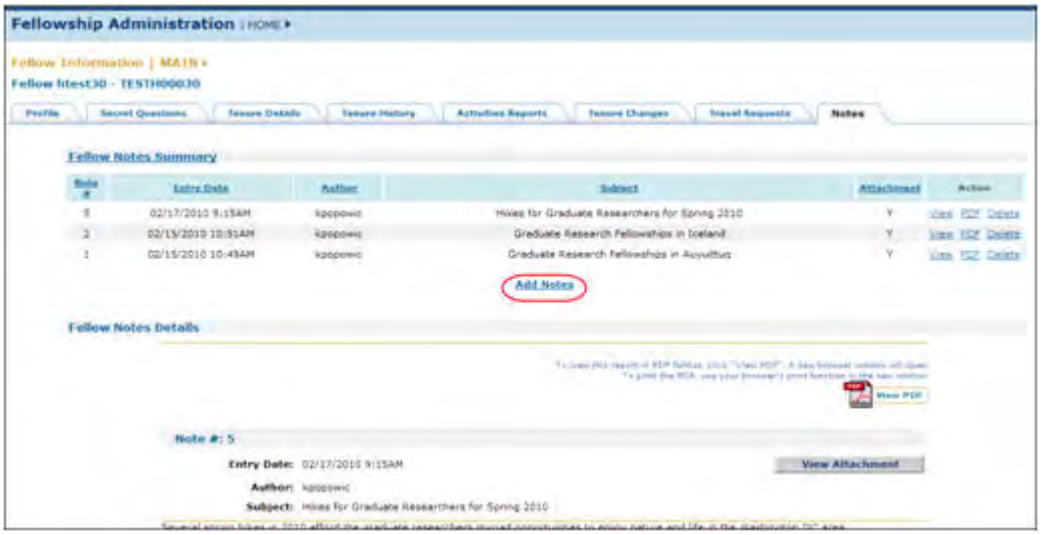


Figure 69: Add Notes Link

The system displays the Add Notes screen as shown below. Enter the Subject relating to the Note and enter Notes. To attach a file, select browse button, attach the desired file and select 'Save' bottom of the screen. The system will navigate to 'fellow notes summary' to display the entered note and attachment.

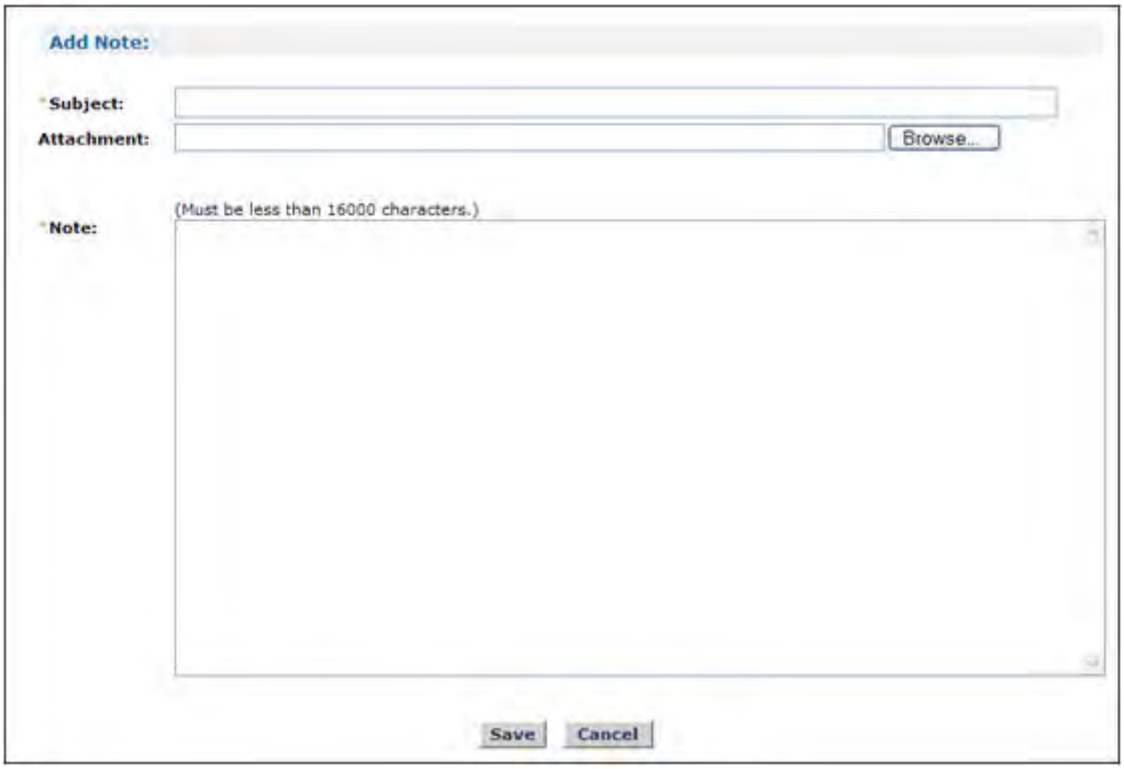


Figure 70: Add Note Screen

View a Fellow Note

Select 'View' link in Action column next to the note you wish to view in Fellow Notes Summary.

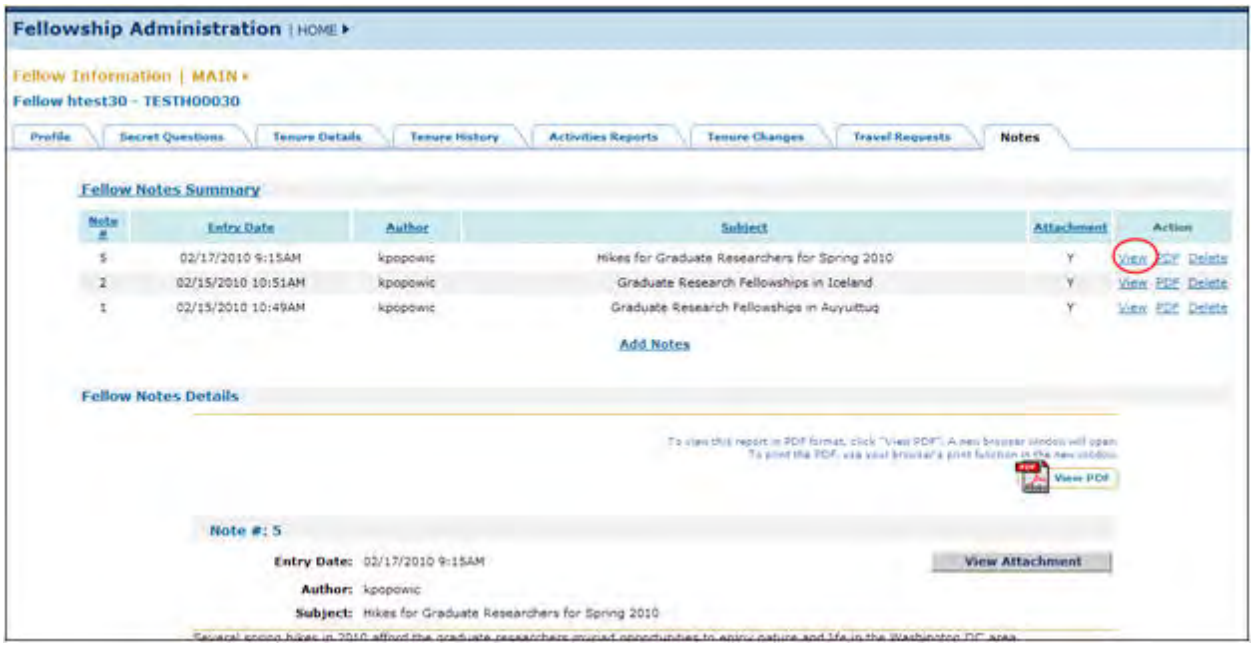


Figure 71: View Note link

The selected note will appear in detail with the note number, entry date & time, the author, subject and the note as shown below

Figure 72: View Fellow Note

Select 'Back to Summary' to navigate back to 'Fellow Notes Summary'.

Delete a Fellow Note

Select 'Delete' link in Action column next to the note you wish to delete in Fellow Notes Summary section

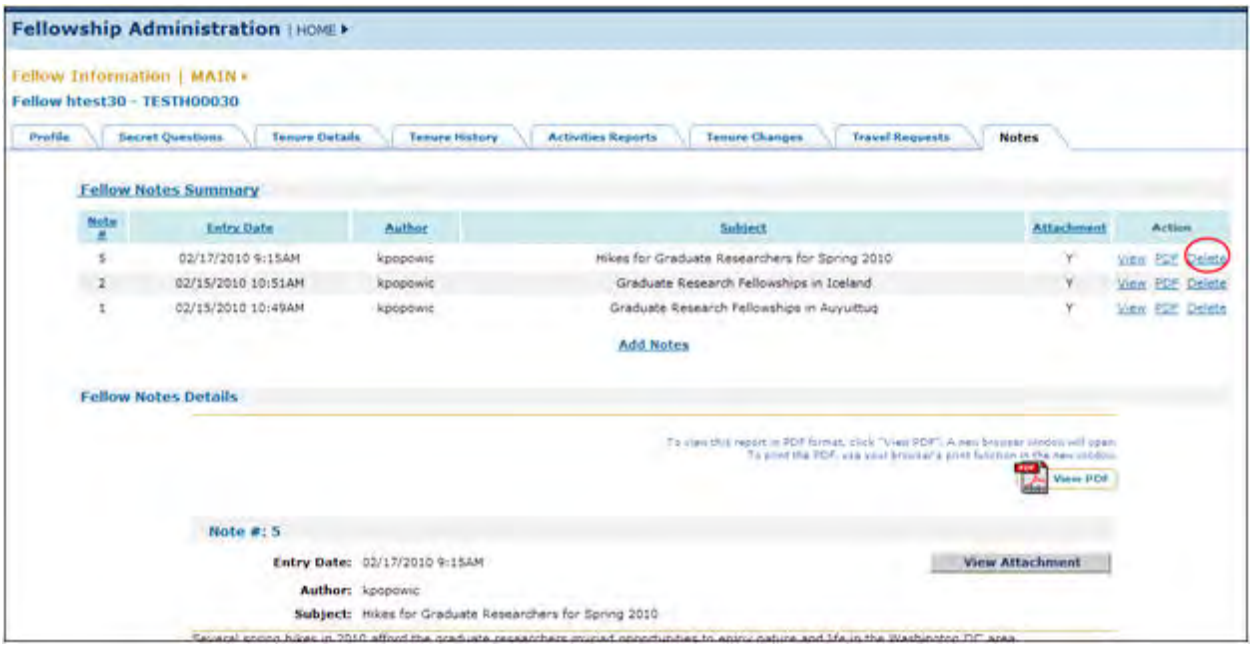


Figure 73: Delete Note link

The system gives an option to cancel or confirm the action to delete with the below message. Select 'Delete Note' to delete the selected note or select cancel to avoid deletion.

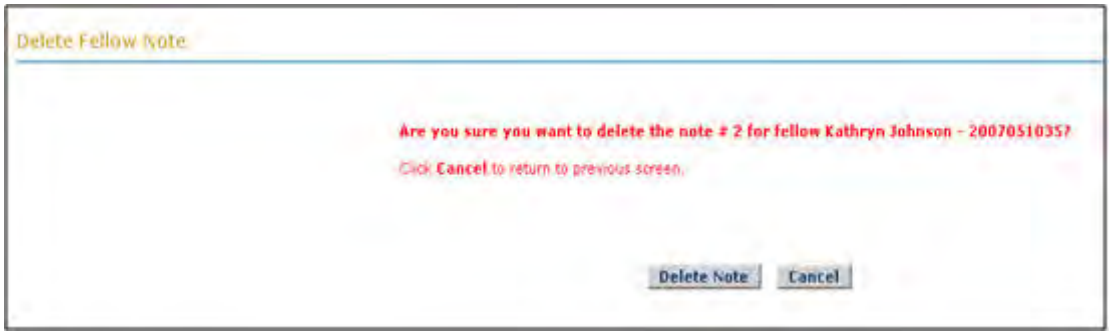


Figure 74: Delete Note Confirmation

When 'Delete Note' is selected, system deletes the message permanently and navigates back to Fellow Notes Summary section.
The remaining notes with their original Note numbers are displayed.
When 'Cancel' is selected, the deletion is cancelled and the system displays Fellow Notes Summary section View a PDF of an Individual Fellow Note
Select the 'PDF' link in the Action column next to the note you wish to delete in Fellow Notes Summary section.

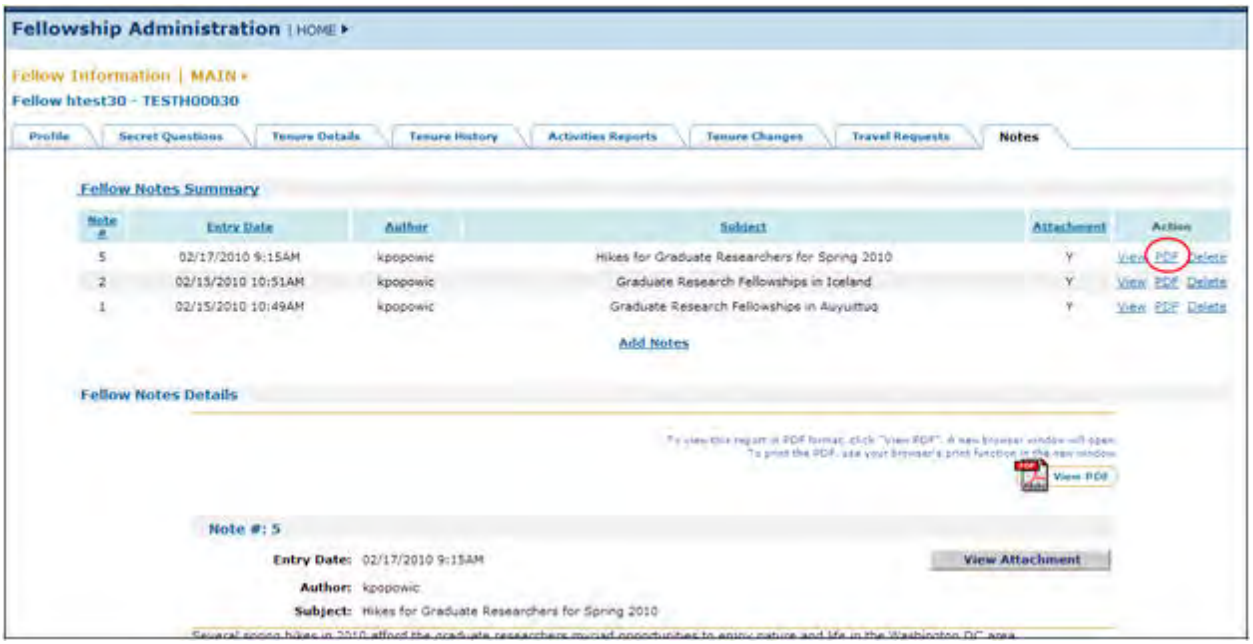


Figure 75: View PDF link

The selected fellow note is generated in the PDF format. The PDF contains the name of the fellow, note number, entry date & time, author, subject, attachment information, the notes text, the printed date and time and the page number

View a PDF of the Fellow Notes log

Select 'View PDF' icon in Fellow Notes Details as shown in the below figure

Figure 76: View Fellow Notes PDF Log Link

The consolidated fellow notes of a particular fellow are generated in the PDF format.

Managing Fellows Abroad

Managing Fellows Abroad

The Managing Fellows Abroad functionality allows you to manage the full Fellows Abroad lifecycle. The Fellows Abroad lifecycle includes Verifying the Fellows Abroad Enrollment and Viewing/Processing the Fellows Abroad Information that requires you to process the fellows Starting Certificates, Payment Enrollment Forms, Termination Certificates and view Travel Certificates (if submitted).

Figure 77: Managing Fellows Abroad Links

The **Verify Fellows Abroad Enrollment** and **View / Process Fellows Abroad** links are located in the Admin Task List and are always provided to you. The number to the right of each task notifies you that either a processing or verification action is required.

Verify Fellows Abroad Enrollment

The Verify Fellows Abroad Enrollment task enables you to verify that the requesting fellow is enrolled at an institution abroad. Verification will come from the fellow's institution's bursars office in the form of an email or other formal written correspondence (fax or mail). The number of fellows requiring enrollment verification is displayed on the right of task in the Admin Task List.

To verify a fellows abroad enrollment:

1. Click on the **Verify Fellows Abroad Enrollment** link.

The Fellows Abroad Enrollment Verification Screen is displayed.

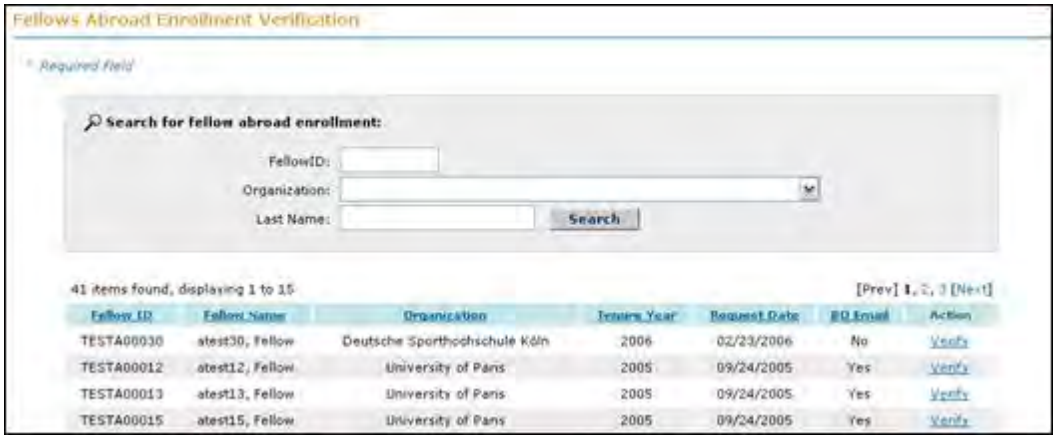


Figure 78: Fellows Abroad Enrollment Verification Screen

You are also able to run a search for a particular fellow or group of fellows by entering specific search criteria: Fellow ID, Organization or Last Name and hitting the **Search** button.

2. Locate the fellow that you want to verify their enrollment at their given institution and press the **Verify** button.

The Verify Fellows Abroad Enrollment Screen is displayed.

Figure 79: Verify Fellows Abroad Enrollment Screen

3. To verify a Fellows Enrollment press the **Verify** button.

NOTE: Selecting the Fellow ID link in the Current Fellow Status bar will open a new browser window displaying the Fellow's detailed Fellowship Status record. You may view and edit historical tenure information from the Fellow's detailed Fellowship Status record.

A confirmation screen is displayed indicating that you have just verified the enrollment request for the chosen fellow. By verifying a fellow's enrollment, the total number of fellows that need to be verified on your admin task list will be reduced by one and this fellow's starting certificate will show up on the View/Process Starting Certificates list waiting for processing (see section 8.2.1 for detail).

View/Process Fellows Abroad

The View/Process Fellows Abroad task enables the Administrator to view/process the Fellows Abroad Starting Certificates, Payment Enrollment Forms, and Termination Certificates, and also enables the Administrator to view Travel Certificates. The number of certificates/forms that require processing is displayed next to the task in the Admin Task List.

To view/process a fellows abroad information:

1. Click on the **View/Process Fellows Abroad** link.

The View/Process Fellows Abroad Screen is displayed.

Figure 80: View/Process Fellows Abroad Screen

The View/Process Fellows Abroad Screen allows you to view/process the following Fellows Abroad Information: Starting Certificates, Payment Enrollment and Termination Certificates. You are also able to View Travel Certificates. The number to the right of each task in the Fellows Abroad Task List indicates that an action is required to process the certificate/form.

View/Process Starting Certificate

The **View / Process Starting Certificate** link allows you to View/Process the Fellows Abroad Starting Certificate information so that they can go abroad the upcoming fellowship year or new semester. A new Starting Certificate is required to be submitted each fellowship year for a fellow that is going abroad regardless of whether or not he/she stays at the same abroad institution.

To view/process a fellow's starting certificate:

1. Click on the **View/Process Starting Certificate** link.

The View/Process Fellows Abroad Starting Certificate Screen is displayed.

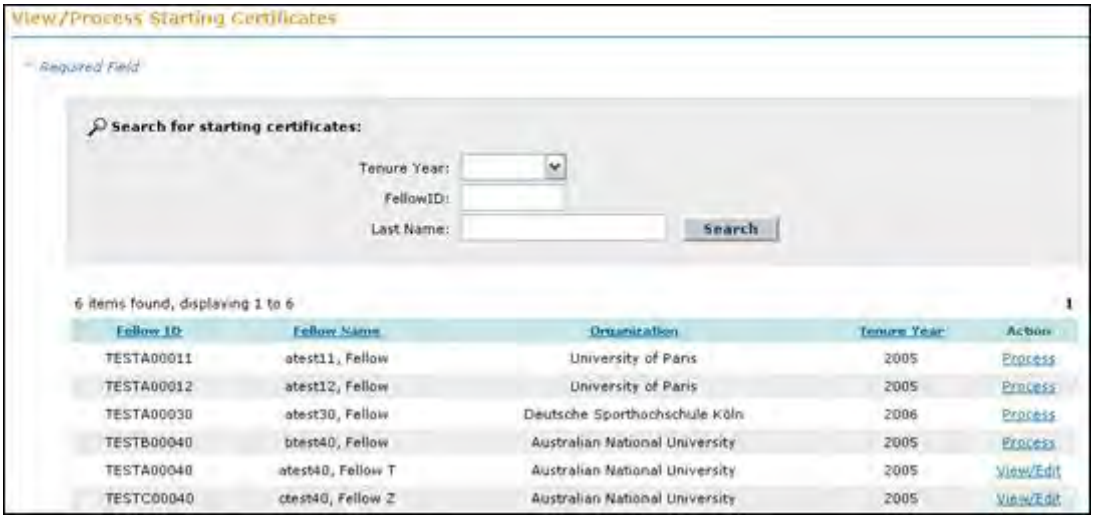


Figure 81: View/Process Fellows Abroad Starting Certificate Screen

As an Administrator, you are able to both **Process** and **View / Edit** a Fellows Starting Certificate. The Process action is a required action by you in order for the requesting fellow to go abroad. You are able to also View/Edit a fellows Starting Certificate if a change needs to be made, or if you need to print off the Starting Certificate of administrative purposes.

To process a fellows starting certificate:

1. Click on **the Process** link.

The Process Starting Certificate Screen is displayed:

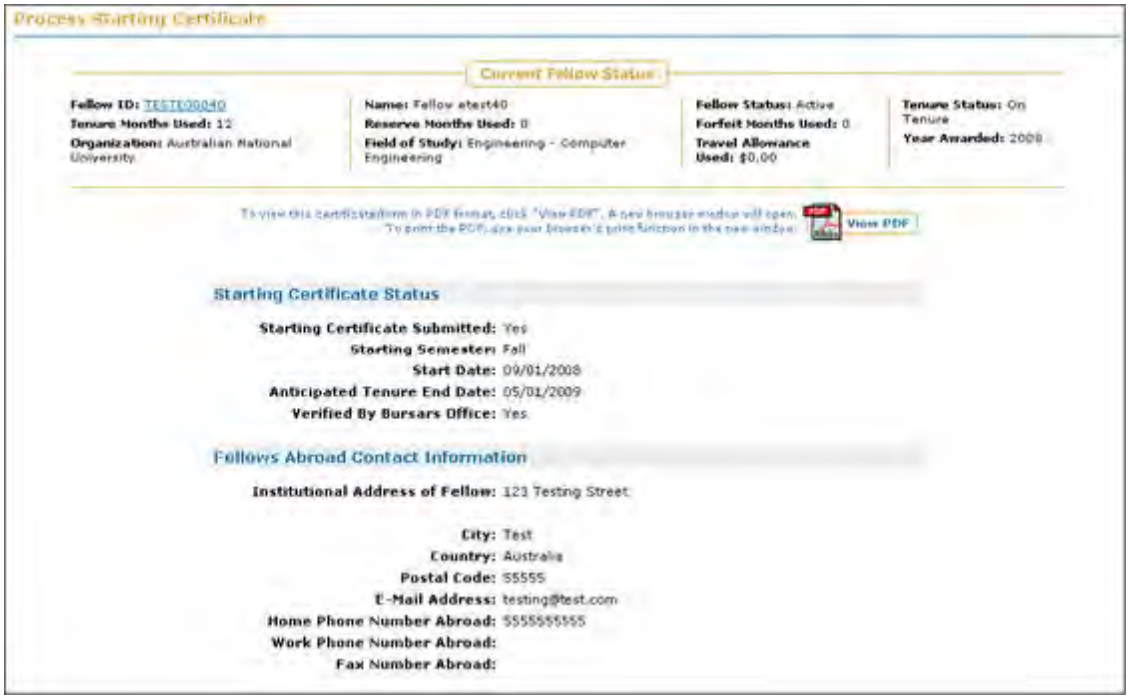


Figure 82: Process Starting Certificate Screen

NOTE: Selecting the Fellow ID link in the Current Fellow Status bar will open a new browser window displaying the Fellow's detailed Fellowship Status record. You may view and edit historical tenure information from the Fellow's detailed Fellowship Status record.

2. Click the **Process** link to process the Fellow's Starting Certificate.

Figure 83: Process Button Screen

After you press the **Process** button, a confirmation screen is displayed and you are able to return to the Adminnistrator home page screen by pressing the **Admin Home Page** link. Once the process button is pressed to process a given Starting Certificate, the total number of Starting Certificates that require processing on the Admin Home Page as well as the number on the View/Process Fellows Abroad Screen will be reduced by one.

To view/edit a fellows starting certificate:

1. Click on the **View/Edit** link.

Figure 84: View/Process Starting Certificate Screen

The View Starting Certificate Screen is displayed.

Figure 85: View Starting Certificate Screen

NOTE: Selecting the Fellow ID link in the Current Fellow Status bar will open a new browser window displaying the Fellow's detailed Fellowship Status record. You may view and edit historical tenure information from the Fellow's detailed Fellowship Status record.

2. To edit a Fellows Starting Certificate, Click on the **Edit** button.

Figure 86: Starting Certificate Edit Button Screen

The Edit Starting Certificate Screen is displayed.

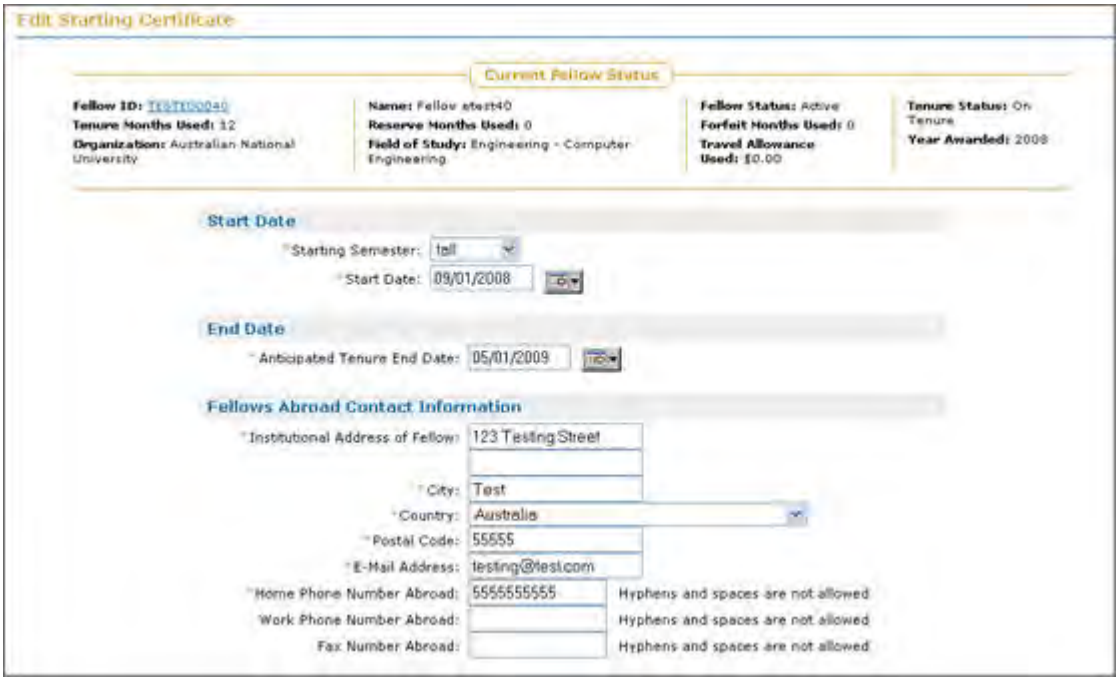


Figure 87: Edit Starting Certificate Screen

3. Edit the Fellows Starting Certificate fields.

NOTE: Selecting the Fellow ID link in the Current Fellow Status bar will open a new browser window displaying the Fellow's detailed Fellowship Status record. You may view and edit historical tenure information from the Fellow's detailed Fellowship Status record.

4. Press the **Save** button to save the edits/changes.

Once the Save button has been pressed, a confirmation screen is displayed that will allow you to return to the Admin Home Page by pressing the **Admin Home Page** link.

View/Process Payment Enrollment

The **View / Process Payment Enrollment** link allows you to view/process the Fellows Payment Enrollment information so that fellows abroad can receive their stipend while they are abroad. A new Payment Enrollment form is not required to be submitted each fellowship year where a fellow is going abroad. The Payment Enrollment form can be updated by fellows abroad whenever necessary.

To view/process a fellow's payment enrollment information:

1. Click on the **View/Process Payment Enrollment** link.

The View/Process Payment Enrollment Screen is displayed.

Figure 88: View/Process Payment Enrollment Screen

As an Administrator, you are able to both **Process** and **View** a fellow's Payment Enrollment information. The **Process** action is a required action by you in order for the requesting fellow to go abroad and receive his/her stipend. You are able to also **View** a fellow's Payment Enrollment information if you need to print off the Payment Enrollment information for administrative purposes.

To process a fellow's payment enrollment information:

2. Click on the **Process** link.

The Process Payment Enrollment Screen is displayed:

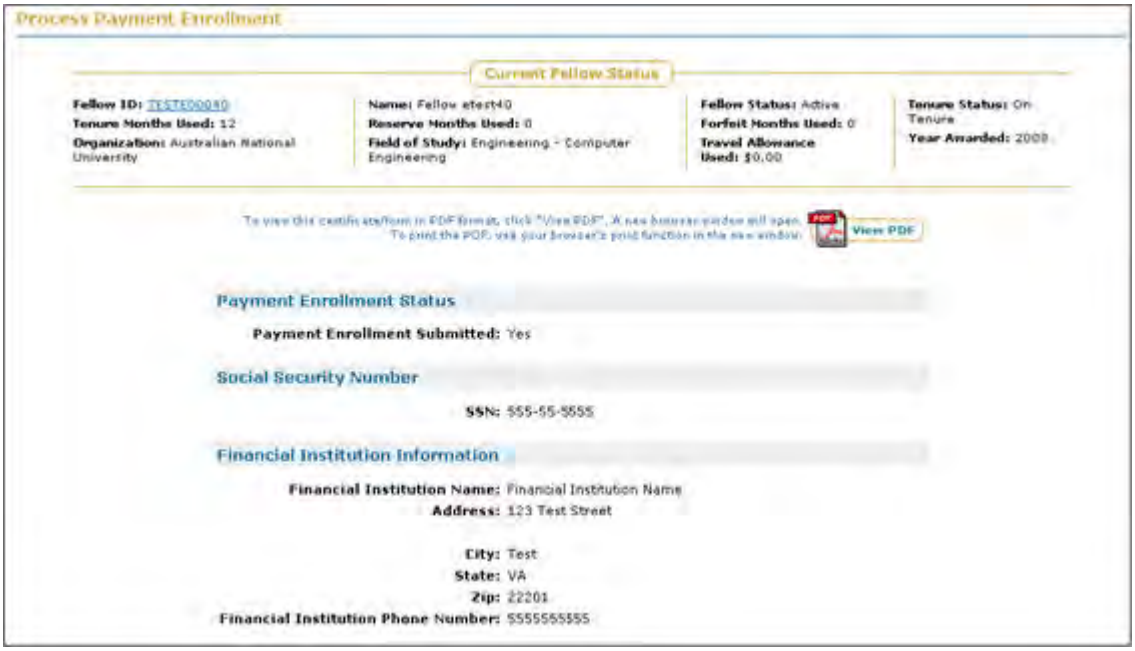


Figure 89: Process Payment Enrollment Screen

NOTE: Selecting the Fellow ID link in the Current Fellow Status bar will open a new browser window displaying the Fellow's detailed Fellowship Status record. You may view and edit historical tenure information from the Fellow's detailed Fellowship Status record.

3. Click the **Process** link to process the Fellows Payment Enrollment information.

Figure 90: Process Payment Enrollment Button Screen

After you press the **Process** button, a confirmation screen is displayed and you are able to return to the admin home page screen by pressing the **Admin Home Page** link. Once the process button is pressed, the total number of Payment Enrollment forms that require processing on the Admin

Home Page and the View/Process Fellows Abroad Screen will be reduced by one per processing action.

To view a fellow's payment enrollment information:

1. Click on the **View** link.

Figure 91: View/Process Payment Enrollment Screen

The View Payment Enrollment Screen is displayed.

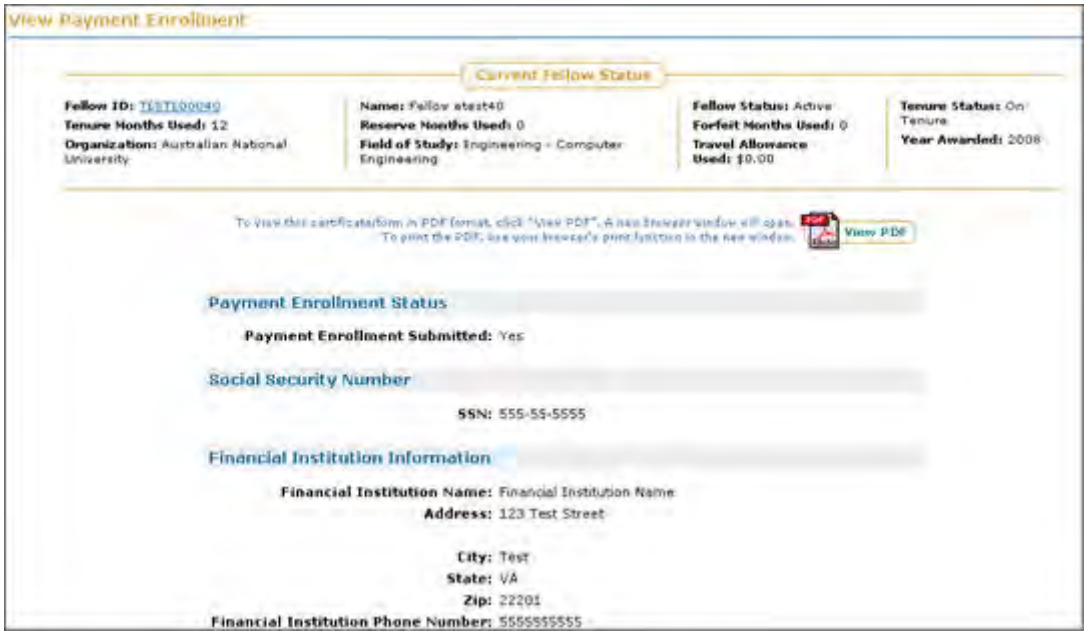


Figure 92: View Payment Enrollment Screen

NOTE: Selecting the Fellow ID link in the Current Fellow Status bar will open a new browser window displaying the Fellow's detailed Fellowship Status record. You may view and edit historical tenure information from the Fellow's detailed Fellowship Status record.

View/Process Termination Certificates

The **View / Process Termination Certificate** link allows you to view/process the Fellow's Termination Certificate so that they can end their fellowship abroad. A Termination Certificate is required to be submitted for each fellowship year when a fellow is abroad.

To view/process a fellows Termination Certificate:

1. Click on the **View/Process Termination Certificate** link.

The View/Process Termination Certificate Screen is displayed.

Figure 93: View/Process Termination Certificate Screen

As an Administrator, you are able to both **Process** and **View / Edit** a fellows Termination Certificate. The Process action is a required action by you in order for the requesting fellow to terminate their tenure abroad. You are able to also View/Edit a fellow's Termination Certificate if a change needs to be made, or if you need to print off the Termination Certificate for administrative purposes.

To process a Fellow's Termination Certificate:

1. Click on the **Process** link.

The Process Termination Certificate Screen is displayed:

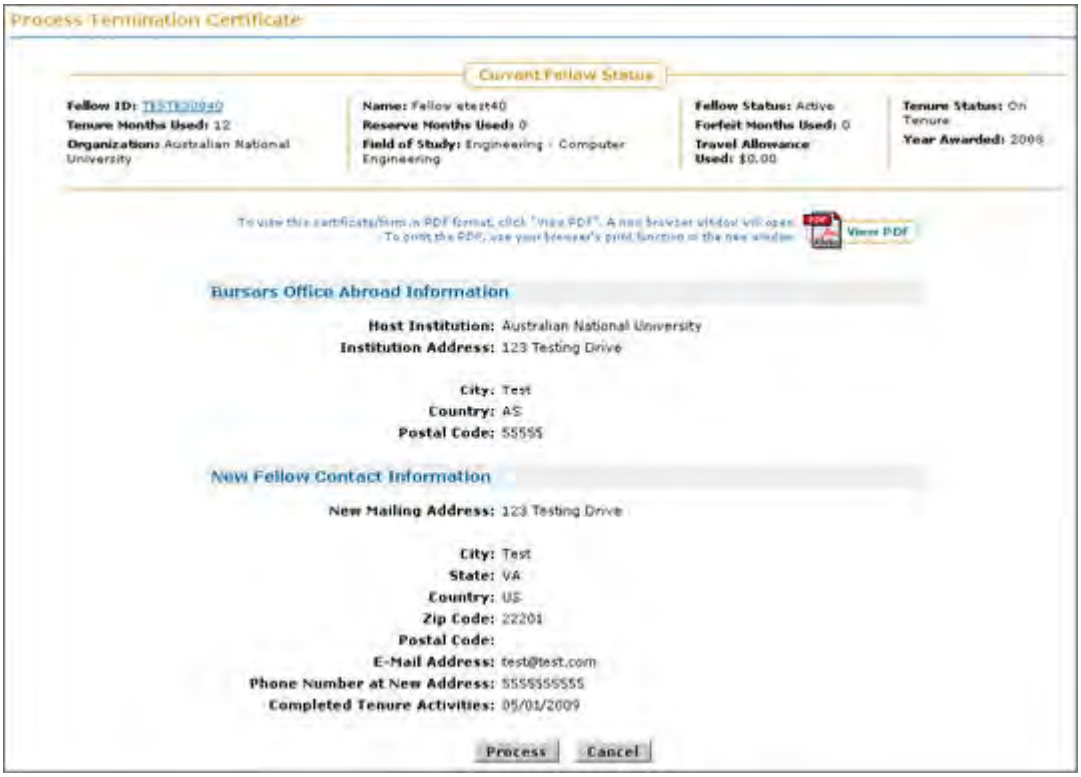


Figure 94: Process Termination Certificate Screen

NOTE: Selecting the Fellow ID link in the Current Fellow Status bar will open a new browser window displaying the Fellow's detailed Fellowship Status record. You may view and edit historical tenure information from the Fellow's detailed Fellowship Status record.

2. Click the **Process** link to process the Fellows Termination Certificate.

After you press the **Process** button, a confirmation screen is displayed and you are able to return to the admin home page screen by pressing the **Admin Home Page** link. Once the process button is pressed, the total number of Termination Certificates that require processing on the Admin Home Page and the View/Process Fellows Abroad Screen will be reduced by one per processing action.

To view/edit a Fellow's termination certificate:

1. Click on the **View/Edit** link.

Figure 95: View/Edit Termination Certificate Screen

The View Termination Certificate Screen is displayed.

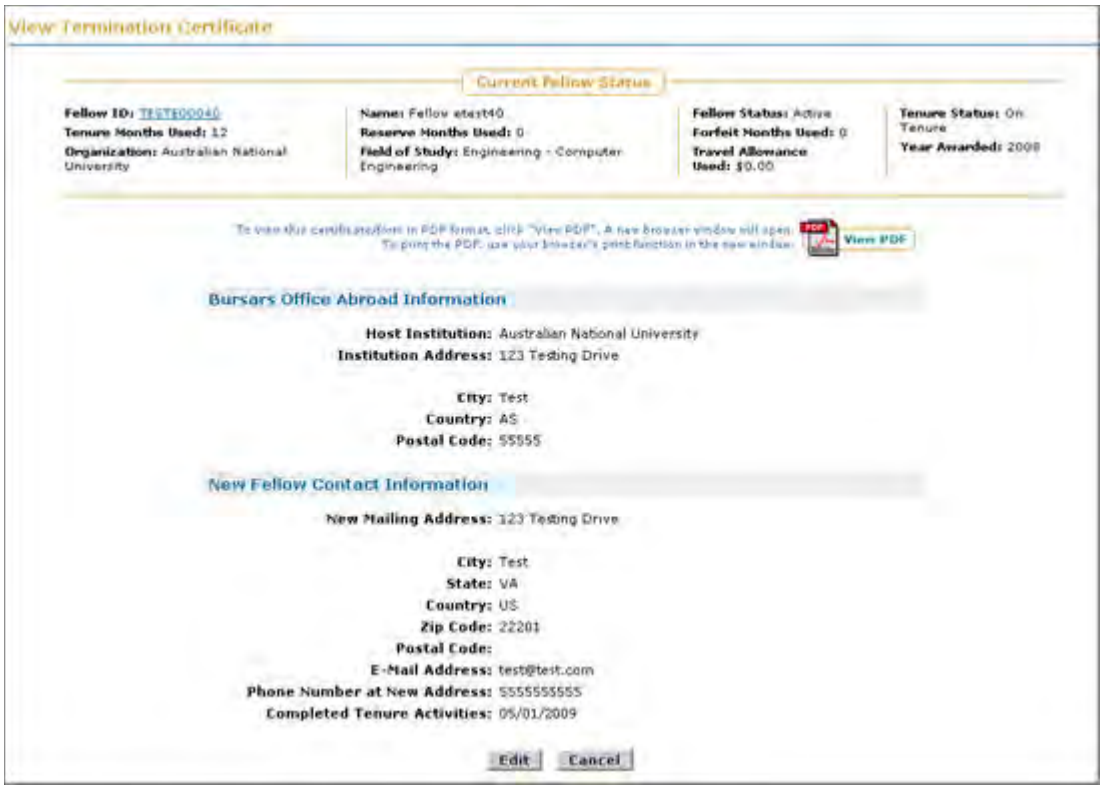


Figure 96: View Termination Certificate Screen

NOTE: Selecting the Fellow ID link in the Current Fellow Status bar will open a new browser window displaying the Fellow's detailed Fellowship Status record. You may view and edit historical tenure information from the Fellow's detailed Fellowship Status record.

2. To edit a Fellow's Termination Certificate, Click on the **Edit** button.

The Edit Termination Certificate Screen is displayed.

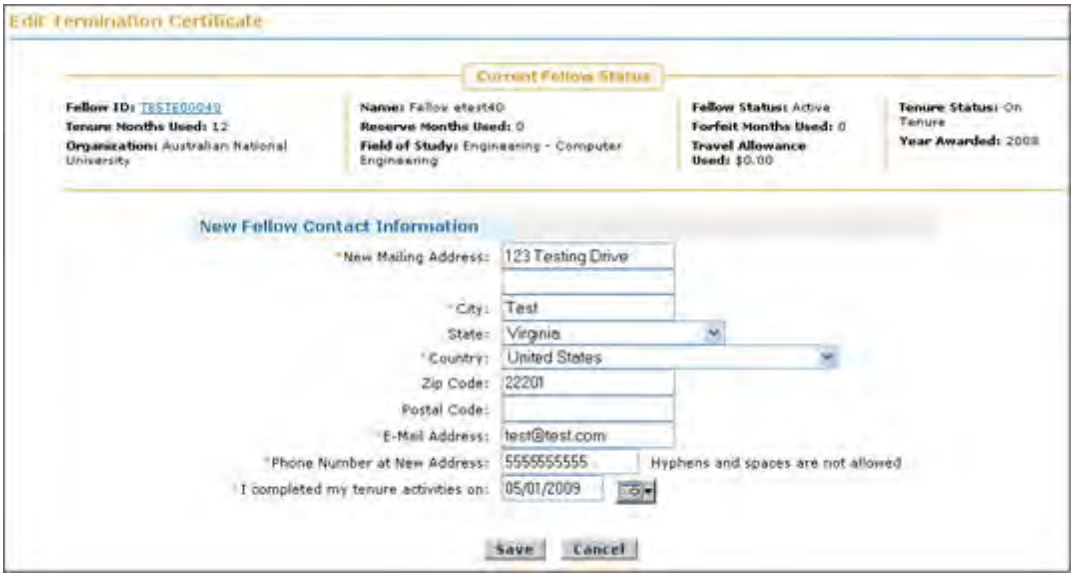


Figure 97: Edit Termination Certificate Screen

NOTE: Selecting the Fellow ID link in the Current Fellow Status bar will open a new browser window displaying the Fellow's detailed Fellowship Status record. You may view and edit historical tenure information from the Fellow's detailed Fellowship Status record.

3. Edit the Fellows Termination Certificate fields.
4. Press the **Save** button to save the edits/changes.

Once the Save button has been pressed, a confirmation screen is displayed and it will allow you to return to the Admin Home Page by pressing the **Admin Home Page** link.

View Travel Certificate

The **View Travel Certificate** link allows you to view the fellows' submitted Travel Certificates. A Travel Certificate is only able to be submitted and approved once and only when the fellow is going to and from an abroad institution. If a Travel Certificate travel allowance request is disapproved, the fellow can modify and resubmit a Travel Certificate.

NOTE: To approve/disapprove a Travel Certificate, see the "Manage Travel Allowance Requests" section of this guide. Click the Approve Travel Request link on the Admin Task List to view, approve, or disapprove travel requests and Travel Certificates.

To view a Fellow's travel certificate:

1. Click on the **View Travel Certificate** link.

The View Travel Certificate Screen is displayed.

Figure 98: View Travel Certificate Screen

2. Choose a Travel Certificate and press the **View** link.

The View Fellow's Travel Certificates Screen is displayed.

Figure 99: View Fellow's Travel Certificates Screen

NOTE: Selecting the Fellow ID link in the Current Fellow Status bar will open a new browser window displaying the Fellow's detailed Fellowship Status record. You may view and edit historical tenure information from the Fellow's detailed Fellowship Status record.

You are then able to view the submitted Travel Certificate that the fellow submitted. You are also able to view the fellow's travel certificate in PDF format. To exit the View Fellow's Travel Certificates Screen, you can press the **Cancel** button or click on the **Fellowship Administrative Home** link at the top of the page.

Viewing Analytical Reports

Viewing Analytical Reports

The analytical reports module allows NSF to view multiple types of analytical reports including, ad hoc reports, activity report statistics and various fellow reports. The **ad hoc reports** tab allows Administrators to retrieve reports for fellows, along with their organization and status, currently in effect, as well as for fellows, along with all their organizations and statuses, for a selected year. The Activities Reports area allows NSF to view the overall statistics for submitted activities reports by academic year and by organization. The Fellow Reports area contains the Award Acceptance and Decline Report, the Fellowship Status Plans Declaration Report, the WENG/WICS Report, the Organization Report, the Fellow Abroad Report, the Retiree Report, and the Fellowship Status Report. All of these reports can be accessed using the View **Analytical Reports** link available in your task list.

Figure 100: View Analytical Reports Link

Ad Hoc Reports

The ad hoc reports tab allows Administrators to retrieve two different types of reports. The first report, Fellow Current Information, returns a list of fellows along with their organization and status currently in effect. The second report, “Tenure Record Information for year”, returns a list of fellows along with all their organizations and statuses for the selected year. Administrators must select one of the following primary filters when searching: Last Name, Major Field of Study, Specific Field of Study, Organization, Fellowship Status, Fellow Status, Year Awarded. In addition, Administrators may also filter on one or more of the following: Gender, Race, Ethnicity, Disability, WENGS, WICS.

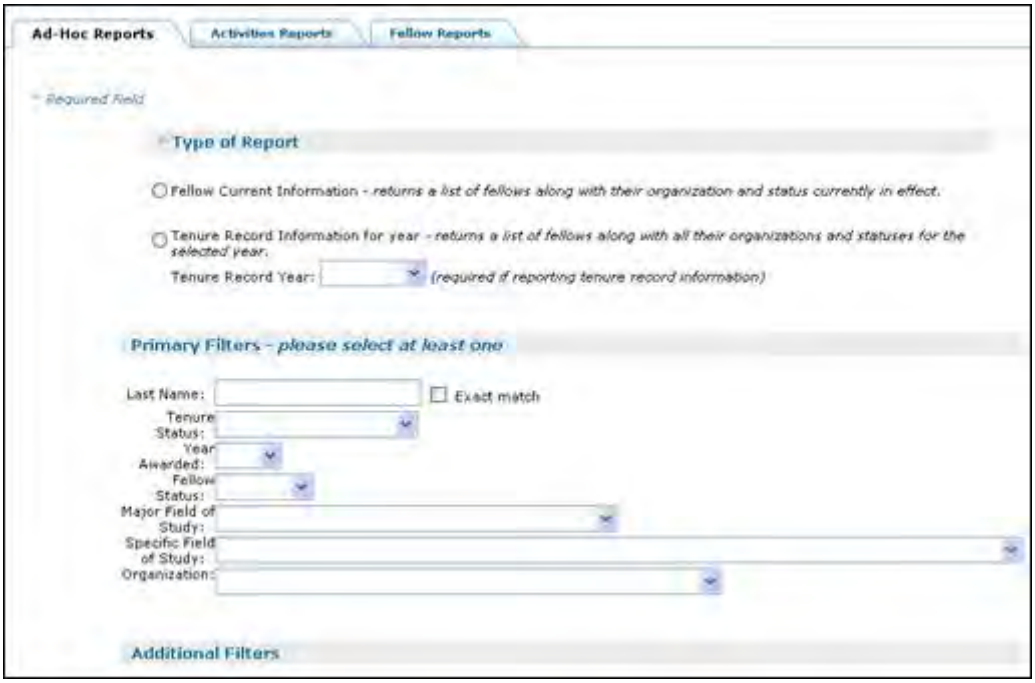


Figure 101: Ad hoc Reports Screen

Activities Report Statistics

The **Activities Reports** tab in the Analytical Reports module contains statistical reports on the activities reports that are submitted by the fellows each year. When you access the page, the most recent year's statistics for all fellows are displayed by default. If you wish to view a different year's report or to view a report for a specific organization, you may use the search box at the top of the page. You are required to enter a specific academic year for all searches.

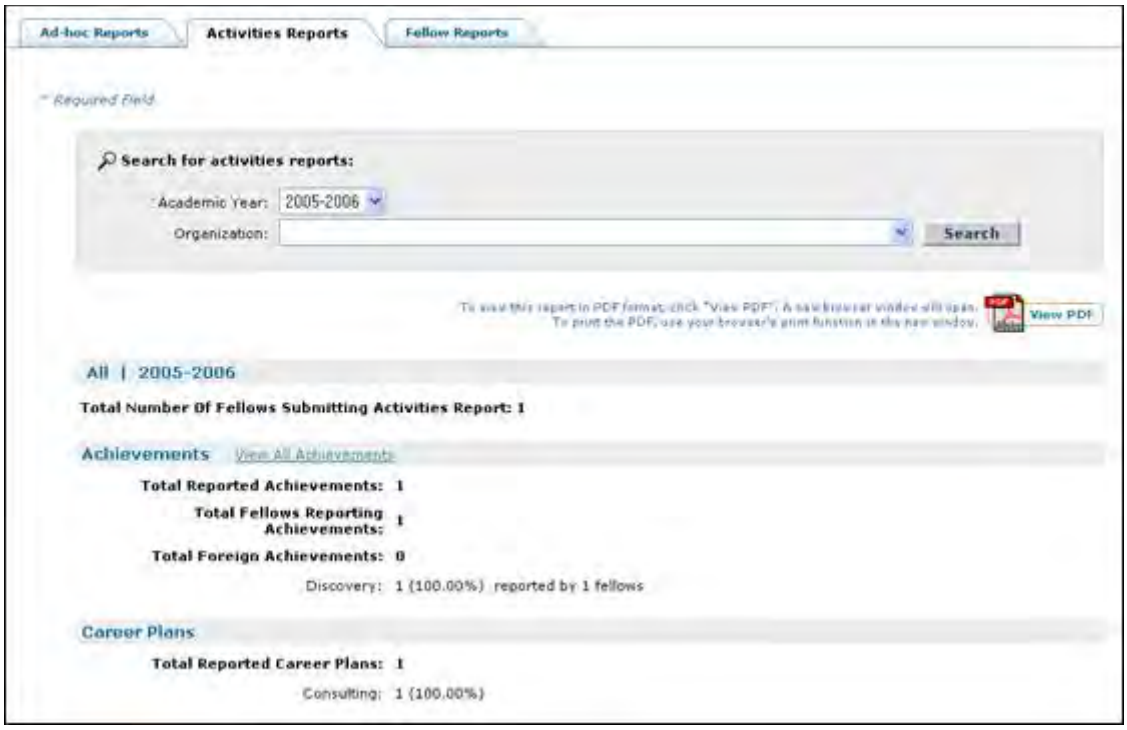


Figure 102: Activities Report Statistics Screen

You may also view the specific achievements that have been reported for the selected year by clicking the **View All Achievements** link located in the Achievements section of the report. You may search for specific achievements by academic year, organization, fellow's field of study, and/or achievement type.

Figure 103: View All Achievements Screen

Fellow Reports

The **Fellow Reports** tab in the Analytical Reports module contains the Award Acceptance

and Decline Report, the Fellowship Status Plans Declaration Report, the WENG/WICS Report, the Organization Report, Fellowship Status Report, the Fellow Abroad Report, the Retiree Report and the Additioinal Funding Opportunities Report. After you select the tab, the list of available reports is displayed with links to each type of report.

Figure 104: Main Fellow Reports Screen

The **Fellowship Status Plans Declaration Report** details the number of fellows eligible for tenure each year and the number that have declared their tenure plans for the selected year.

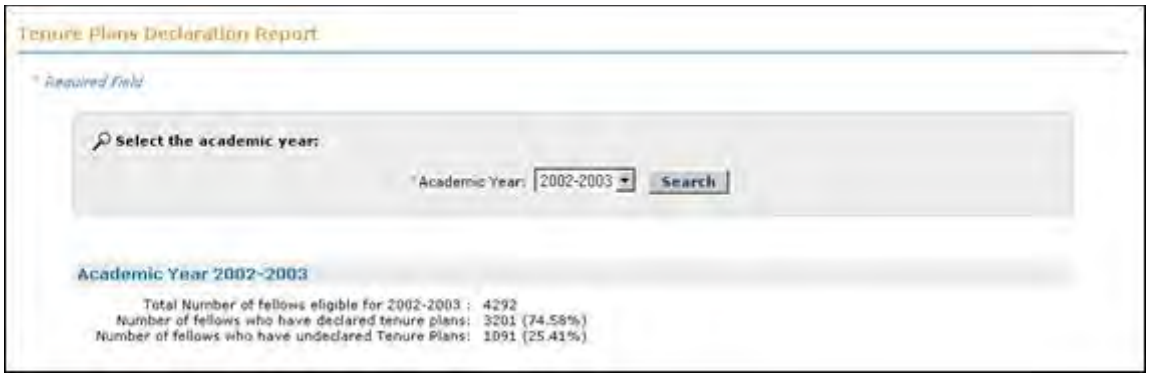
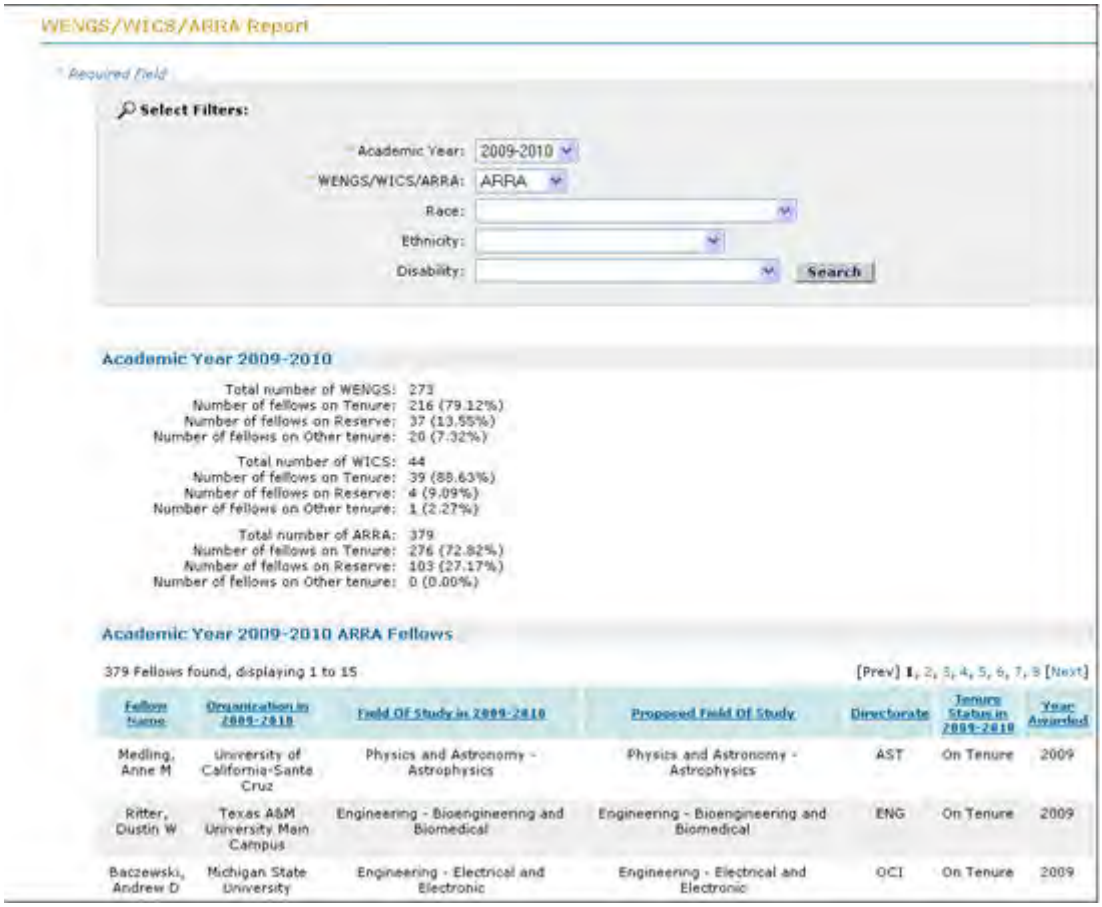


Figure 105: Fellowship Status Plans Declaration Report

The **Award Acceptance and Decline Report** details the number of award acceptances and declinations for each academic year. It also contains both a list of the awardees that have neither accepted nor declined, and a list of the awardees that declined their awards and the reason(s) the
awardees gave for declining their awards.

Figure 106: Award Acceptance and Decline Report

The **WENGS/WICS/ARRA Report** details the number of Women in Engineering, Women in Computer Science, and fellow designated as ARRA fellows for each academic year. The total number of WENGS/WICS/ARRA feelows is displayed along with the number of WENGS, WICS and ARRA fellows for each Fellowship Status. There is also a detailed listing of each WENG/WIC/ARRA for the academic year that includes the fellow's name, organization, field of study, Fellowship Status, and directorate (for ARRA fellows only).



WENGS/WICS/ARRA Report

* Required Field

Select Filters:

* Academic Year: 2009-2010
* WENGS/WICS/ARRA: ARRA
Race:
Ethnicity:
Disability:
Search

Academic Year 2009-2010

Total number of WENGS: 273
Number of fellows on Tenure: 216 (79.12%)
Number of fellows on Reserve: 37 (13.55%)
Number of fellows on Other tenure: 20 (7.32%)

Total number of WICS: 44
Number of fellows on Tenure: 39 (88.63%)
Number of fellows on Reserve: 4 (9.09%)
Number of fellows on Other tenure: 1 (2.27%)

Total number of ARRA: 379
Number of fellows on Tenure: 276 (72.82%)
Number of fellows on Reserve: 103 (27.17%)
Number of fellows on Other tenure: 0 (0.00%)

Academic Year 2009-2010 ARRA Fellows

379 Fellows found, displaying 1 to 15 [Prev] 1, 2, 3, 4, 5, 6, 7, 8 [Next]

Fellow Name	Organization in 2009-2010	Field Of Study in 2009-2010	Proposed Field Of Study	Directorate	Tenure Status in 2009-2010	Year Awarded
Medling, Anne M	University of California-Santa Cruz	Physics and Astronomy - Astrophysics	Physics and Astronomy - Astrophysics	AST	On Tenure	2009
Ritter, Dustin W	Texas A&M University Main Campus	Engineering - Bioengineering and Biomedical	Engineering - Bioengineering and Biomedical	ENG	On Tenure	2009
Baczewski, Andrew D	Michigan State University	Engineering - Electrical and Electronic	Engineering - Electrical and Electronic	OCI	On Tenure	2009

Figure 107: WENGS/WICS/ARRA Report

The **Organization Report** details organizations that have fellows participating in the GRFP program for each academic year as well as the "Current" date. Organizations are listed along with the number of fellows that are associated with the organization.

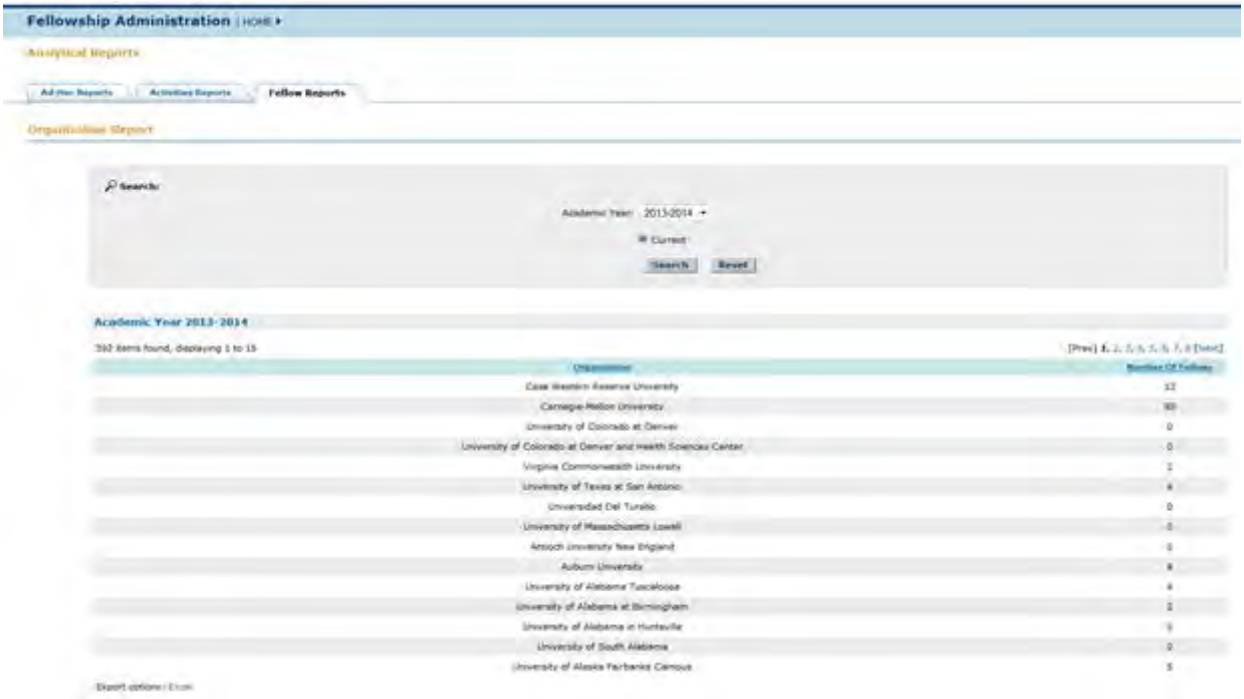


Figure 108: Organization Report

The **Fellowship Status Report** details the number of active fellows for each academic year and the number of fellows for each Fellowship Status.

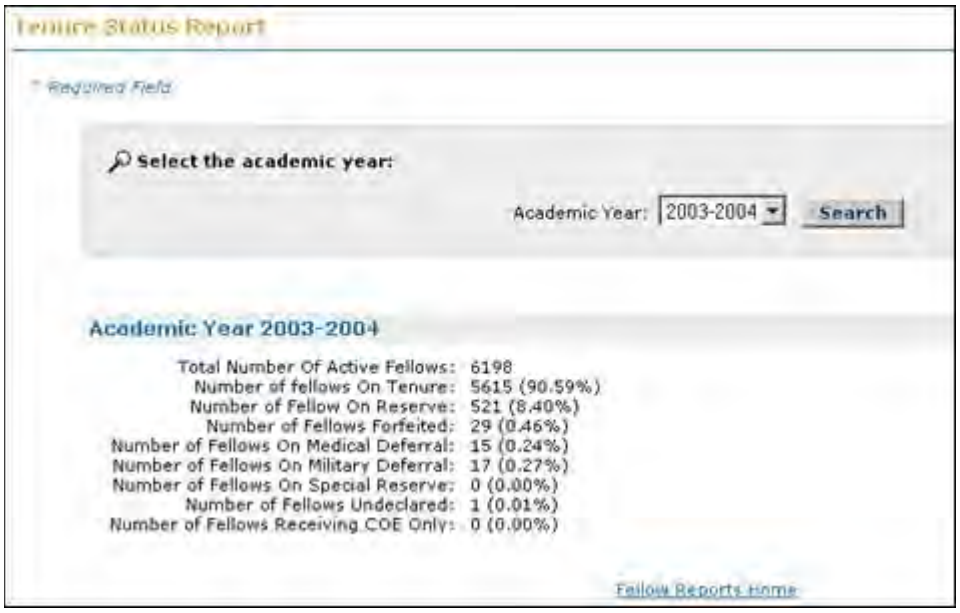
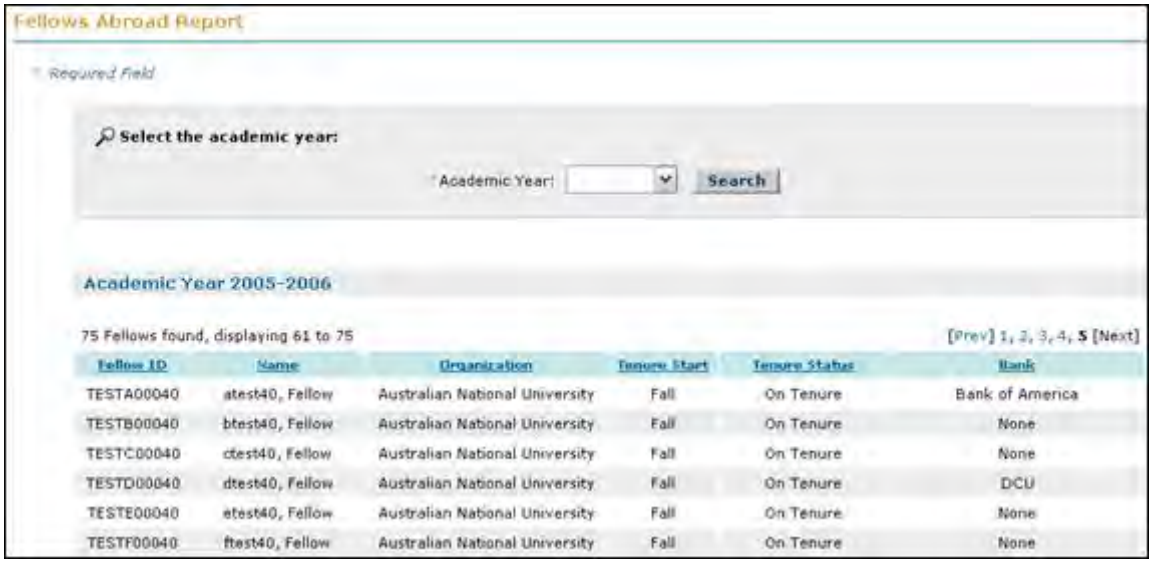


Figure 109: Fellowship Status Report

The **Fellows Abroad Report** lists the fellows for a given academic year that are abroad, along with their Fellow ID, Organization they are attending abroad, Tenure Start period, Fellowship Status and Bank name.



Fellows Abroad Report

* Required Field

Select the academic year:

* Academic Year: Search

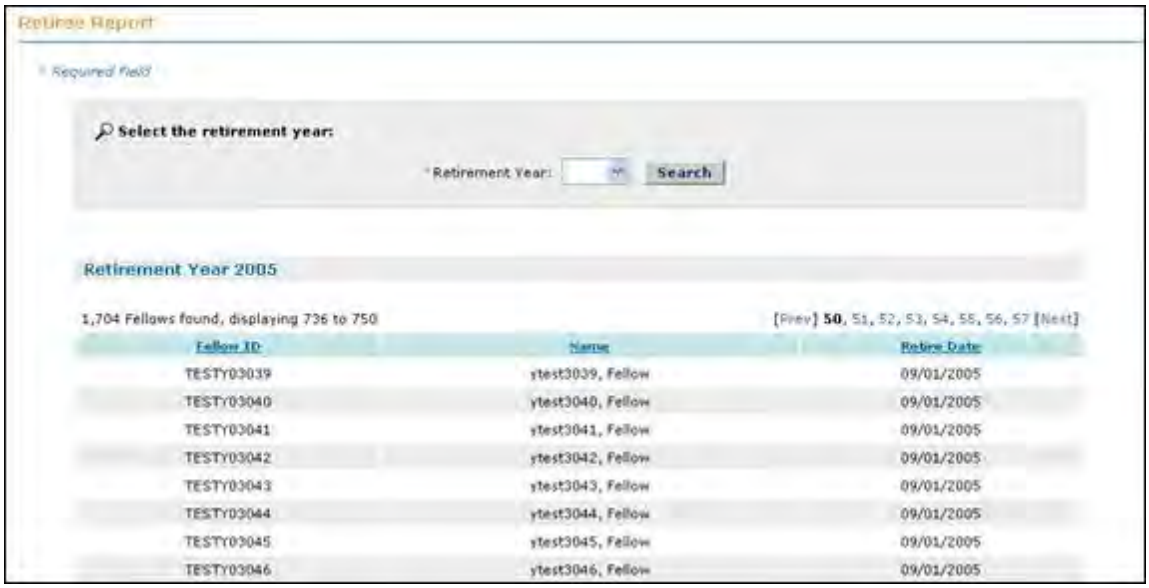
Academic Year 2005-2006

75 Fellows found, displaying 61 to 75 [Prev] 1, 2, 3, 4, 5 [Next]

Fellow ID	Name	Organization	Tenure Start	Tenure Status	Bank
TESTA00040	atest40, Fellow	Australian National University	Fall	On Tenure	Bank of America
TESTB00040	btest40, Fellow	Australian National University	Fall	On Tenure	None
TESTC00040	ctest40, Fellow	Australian National University	Fall	On Tenure	None
TESTD00040	dtest40, Fellow	Australian National University	Fall	On Tenure	DCU
TESTE00040	etest40, Fellow	Australian National University	Fall	On Tenure	None
TESTF00040	ftest40, Fellow	Australian National University	Fall	On Tenure	None

Figure 110: Fellows Abroad Report

The **Retiree Report** lists all of the fellows that are going to be retired or have been retired for a given calendar year, along with their Fellow ID.



Retiree Report

* Required Field

Select the retirement year:

* Retirement Year: Search

Retirement Year 2005

1,704 Fellows found, displaying 736 to 750 [Prev] 50, 51, 52, 53, 54, 55, 56, 57 [Next]

Fellow ID	Name	Retire Date
TESTY03039	ytest3039, Fellow	09/01/2005
TESTY03040	ytest3040, Fellow	09/01/2005
TESTY03041	ytest3041, Fellow	09/01/2005
TESTY03042	ytest3042, Fellow	09/01/2005
TESTY03043	ytest3043, Fellow	09/01/2005
TESTY03044	ytest3044, Fellow	09/01/2005
TESTY03045	ytest3045, Fellow	09/01/2005
TESTY03046	ytest3046, Fellow	09/01/2005

Figure 111: Retiree Report

The **Activities Reports Not Submitted** lists all of the fellows who have not submitted an activity report for a given academic year, along with their Fellow ID number, Months on Tenure, Months on Reserve, Award Year and Current Organization.

Figure 112: Activities Reports Not Submitted

The **Unsatisfactory Rating Fellows Report** depicts the total number of ratings for a given year, which may include ratings from multiple organizations for those fellows who were on tenure at more than one organization in a year. Additionally the Unsatisfactory Rating Fellows Report provides a list of fellows who have not been rated.

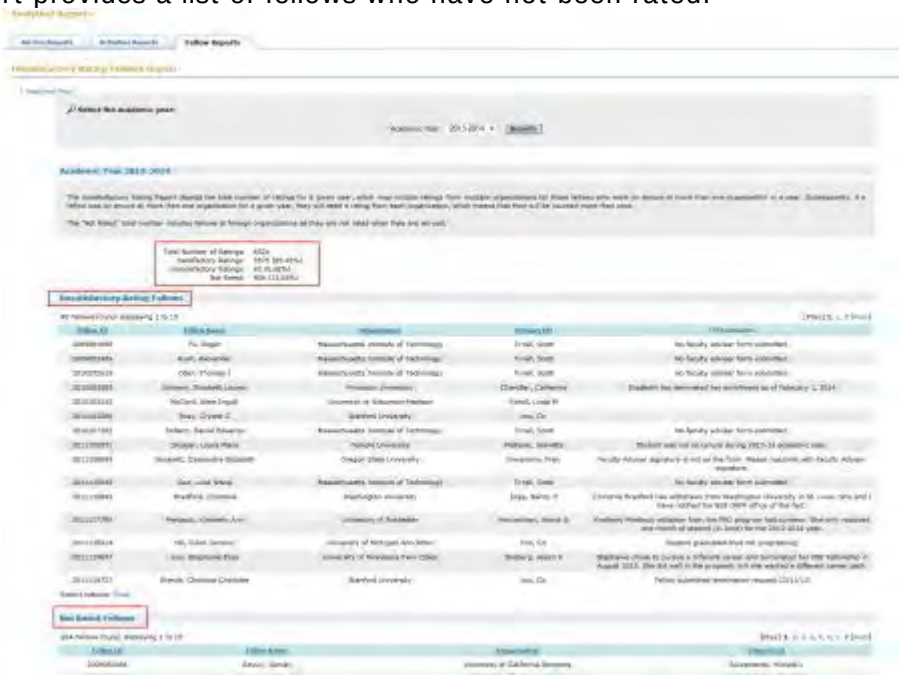
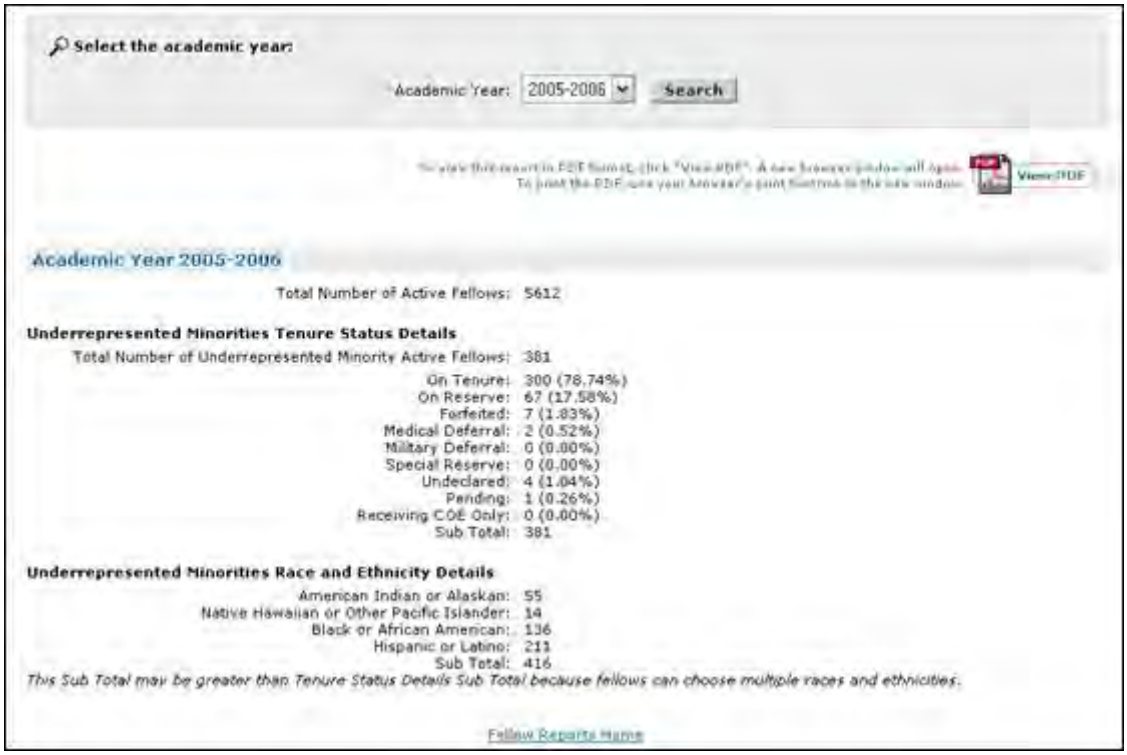


Figure 113: Unsatisfactory Ratings Fellows Report

The **Underrepresented Minorities Report** depicts the Total Number of Underrepresented Minority Fellows that are Active for a given year. The report also provides a detailed break down of Minorities by Race and Ethnicity.



Select the academic year:

Academic Year: 2005-2006 Search

Academic Year 2005-2006

Total Number of Active Fellows: 5612

Underrepresented Minorities Tenure Status Details

Total Number of Underrepresented Minority Active Fellows: 381

On Tenure:	300 (78.74%)
On Reserve:	67 (17.58%)
Forfeited:	7 (1.83%)
Medical Deferral:	2 (0.52%)
Military Deferral:	0 (0.00%)
Special Reserve:	0 (0.00%)
Undeclared:	4 (1.04%)
Pending:	1 (0.26%)
Receiving COE Only:	0 (0.00%)
Sub Total:	381

Underrepresented Minorities Race and Ethnicity Details

American Indian or Alaskan:	55
Native Hawaiian or Other Pacific Islander:	14
Black or African American:	136
Hispanic or Latino:	211
Sub Total:	416

This Sub Total may be greater than Tenure Status Details Sub Total because fellows can choose multiple races and ethnicities.

Fellow Reports Home

Figure 114: Underrepresented Minorities Report

The **Active Fellows Disability Status Report** depicts the total number of active fellows with disability for a given year. The report also provides a detailed break down of Disabilities by type of disability listed. The report contains a detailed description of fellows who chose “Other Disability” and specified that disability in text.

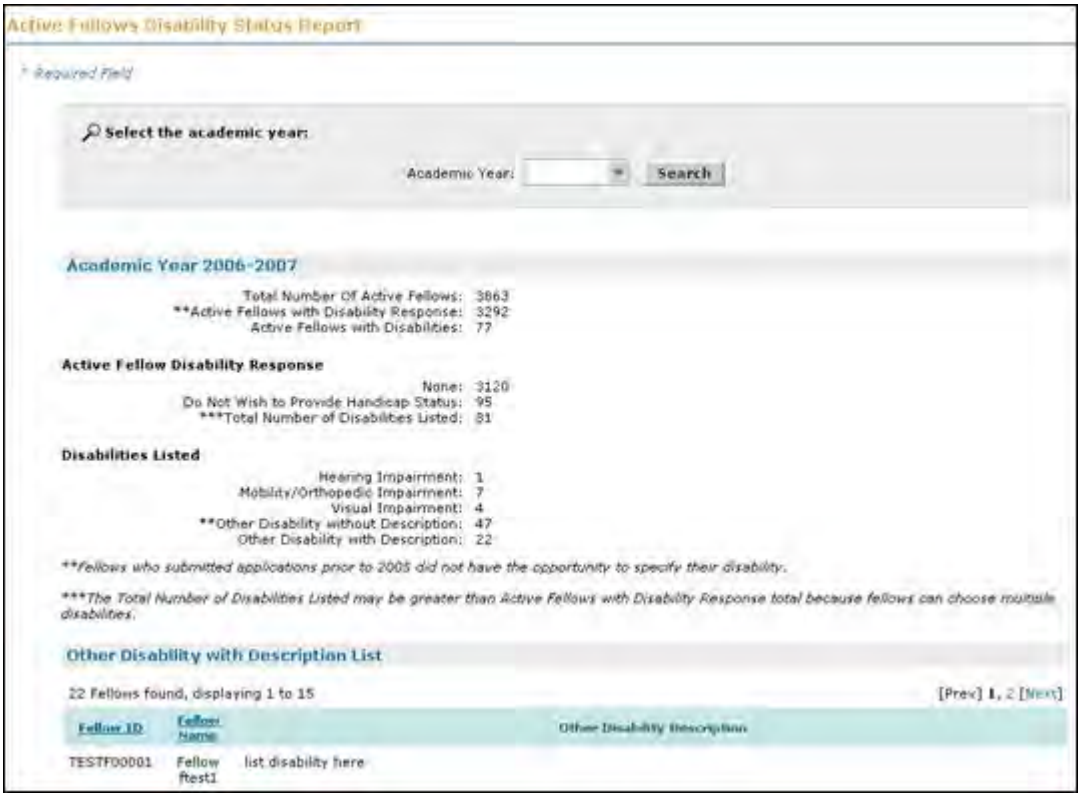


Figure 115: Active Fellows Disability Status Report

The **Travel Requests Report** details the number of submitted travel allowance requests and Travel Certificates that were submitted during a given tenure each year and the statistics on how many were approved, disapproved, or pending by CO or NSF Administrator. The report also details all pending travel allowance requests.

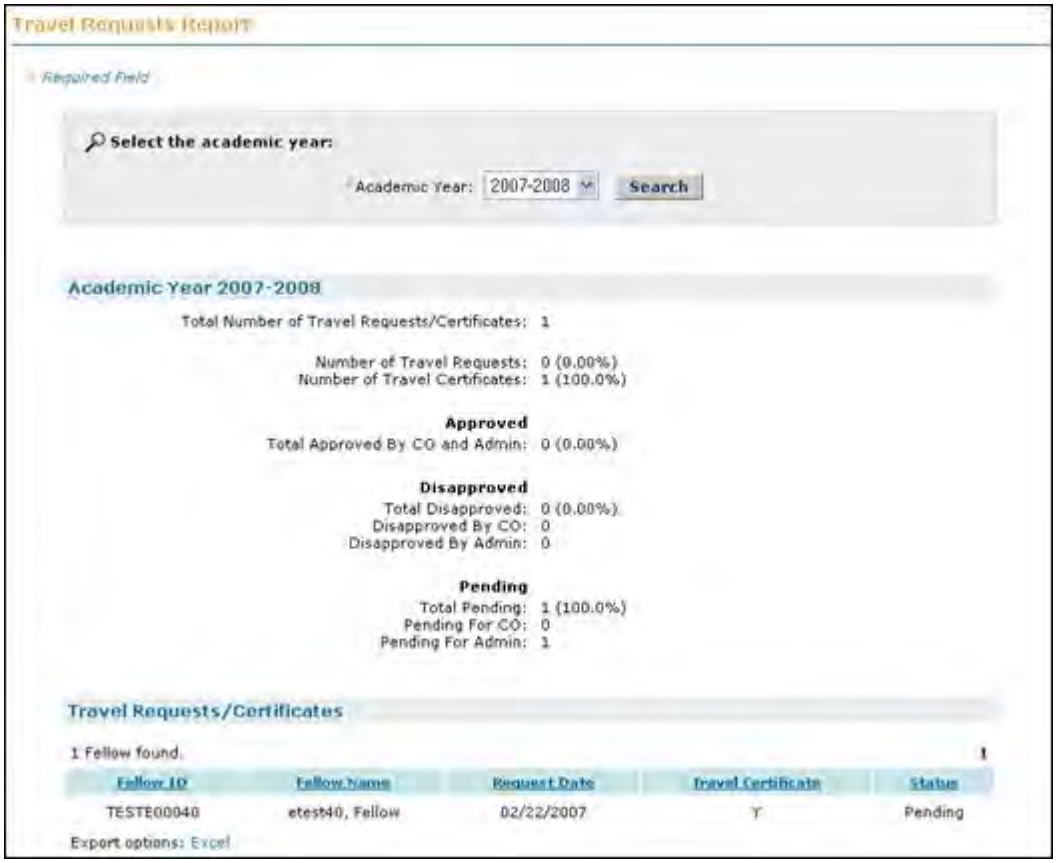


Figure 116: Travel Requests Report

The **Additional Funding Opportunities Report** depicts the number of fellows who submit requests for Additional Funding opportunities in a given fellowship year and the statistics on how many were approved, disapproved, or pending by CO or NSF Administrator. The user can search by Academic Year or Additional Funding Opportunity type or both. The report provides a detailed breakdown of Additional Funding requests.

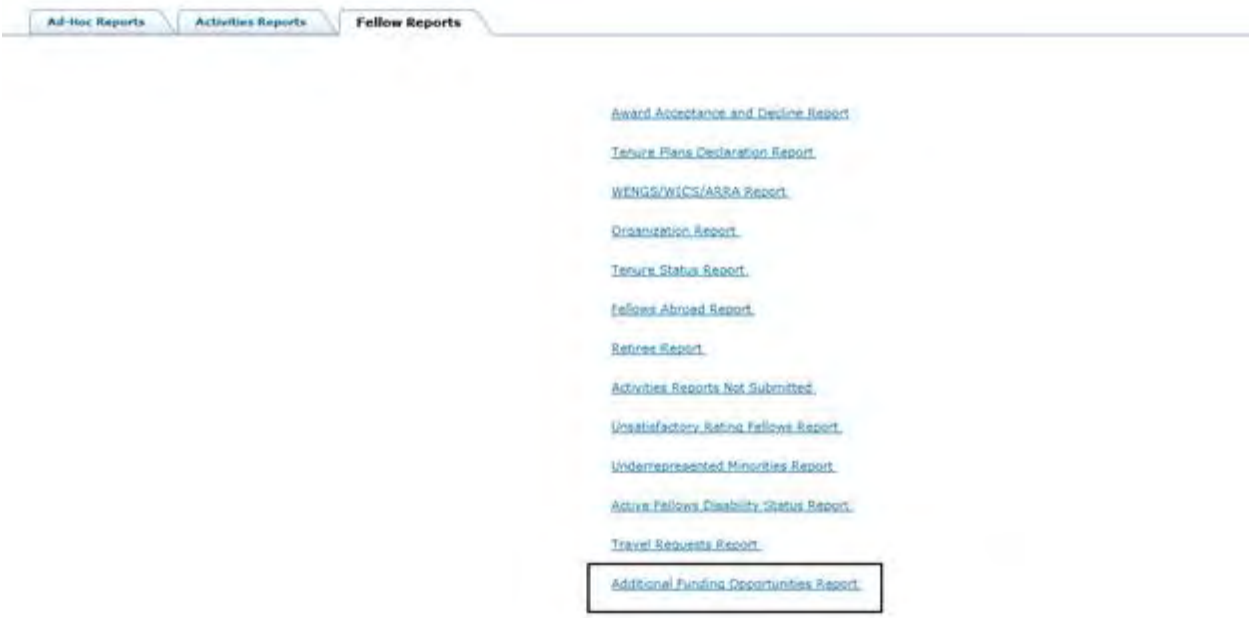


Figure 117: Link to Additional Funding Opportunities Report

Figure 118: Additional Funding Opportunities Report

Administering the GRFP System

Administering the GRFP System

There are four administration features that are available for managing the GRFP System. They include managing email notifications, managing costs, and managing task

dates. The system administration features are available using the **System Administration** link in your task list.

Figure 119: System Administration Link

A description of each feature in the System Administration module can be found in the sections below.

Managing Email Notifications

Many of the tasks that fellows and Coordinating Officials must complete are tasks that need to be performed at certain times of the year. For each of these types of tasks, the system will send email reminders to the selected recipient group(s) that details what task must be completed on the day that NSF takes the action to send out the email.
For certain emails, upon selecting Send Email, you will be able to select multiple recipient groups including secondary email addresses for Fellows. The default recipient can not be changed; however you may select as many additional recipient groups as are available. In the event that a separate email type needs to be created and sent to multiple user groups, you can use the Ad Hoc email functionality that allows you to create a custom email message and distribute to one or multiple audiences.

The **Email** tab of the System Administration module allows NSF to manage the send dates for these emails. NSF can also edit the text of the email that is sent for each task reminder.

Figure 120: Email Administration Screen

Note: For each email type, the email will be sent out to the entire group of recipients in the category with the exception of the Ad Hoc email, which allows you to choose your recipient group. For example, when sending out an email to Coordinating Officials for Fellow Rating Submission, all COs will receive the email, whether or not they have fellows that need to be rated.

Sending an Adhoc Email

If one of the predefined email options are not applicable to the message you are sending, you can use the adhoc email functionality to define your recipient groups and the text of the email. NSF can also edit the text of the email that is sent for each task reminder

To send an adhoc email:

1. Select the send email link next to the Adhoc Email type

The adhoc email screen appears:

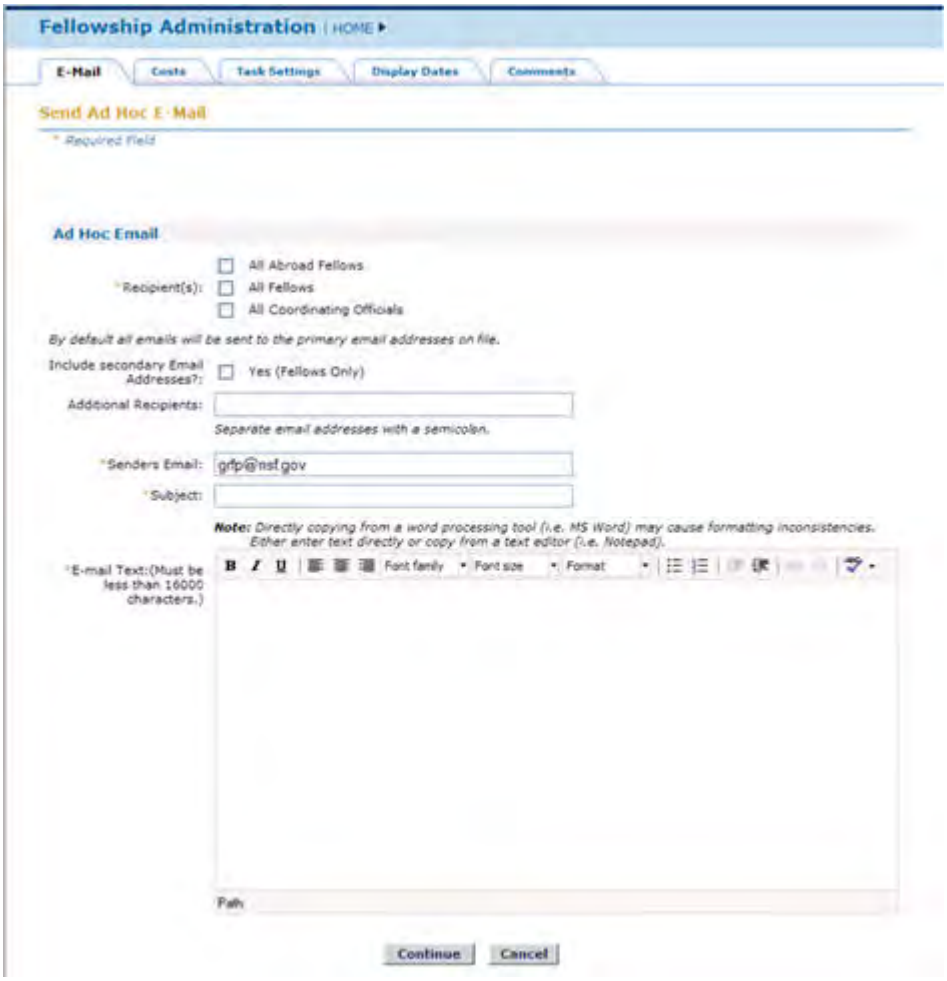


Figure 121: Adhoc Email Screen

2. Select the recipient group (Abroad Fellows, Fellows, Coordinating Officials)
3. If sending to Fellows, select Secondary Email addresses to send the email to both the primary and secondary email addresses of the Fellows.
4. Enter the email addresses of any additional recipients (if applicable)
5. Enter the sender's email address
6. Enter the email Subject
7. In the email text box, enter the body of the email. You may adjust the font size, font type and format from this text box.
8. To insert a hyperlink,
   a. Highlight the text that you wish to become a link
   b. Select the hyperlink button to the right of the underline button
   c. Enter the URL that the link should point to

d. Select Submit Query

The text that was highlighted should now be blue and will be a link when the email is previewed and sent.

9. Select Continue

The email preview screen appears

10. Select Send Email to send the email

Communications History

Storage of AdHoc emails that are sent from the Admin Module are now stored and searchable for anyone with administrative rights within the System Administration link.

Figure 122: System Administration

Once on the Communications History tab, a user can search for an email by: Date, Recipient Type or Subject.

Figure 123: Communications History Tab

Once the user has identified the email they are searching for they can select the view link to view the contents of the email.

Figure 124: View Email Content

Managing Costs

The **Costs** tab of the System Administration module allows NSF to manage the fellowship costs for each fiscal year. The costs include the stipend amount, cost-of-education allowance, and GROW awards. The GRFP System will automatically populate the costs for the next fiscal year each year with the costs from the previous year. NSF then has the ability to update these costs as needed. The changes to the costs will be reflected in each new fellow Fellowship Status record for that fiscal year, unless otherwise changed by NSF.

The **Costs** tab also provides the ability for a user to Edit/Apply funding changes to a specific fellow record after the approval of an additional funding opportunity by selecting either the Apply Funding link.

Figure 122: Cost Administration Screen

When the Apply Funding link is selected the user is taken to the Apply Funding Confirmation page. The user confirms/updates the Academic Year and then selects the Funding Opportunity Type from the drop down list and clicks the Apply Funding button.

Figure 123: Apply Funding Fields

Figure 124: Apply Funding

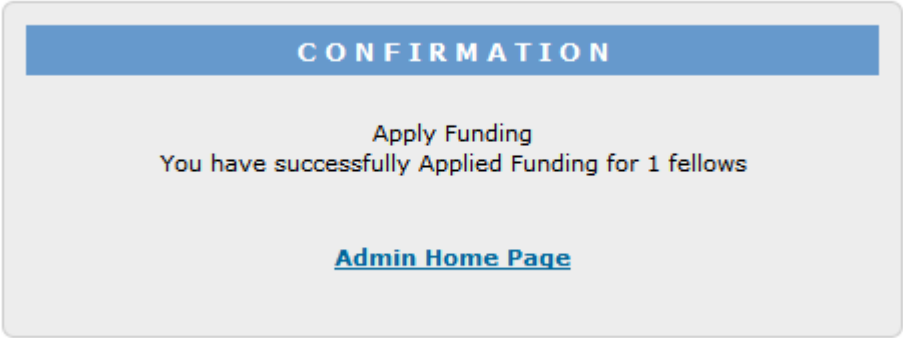


Figure 125: Apply Funding Confirmation Screen

Managing Task Settings

The **Task Settings** tab of the System Administration module allows the NSF Administrators to manage tasks for Fellows, Applicants, Reference Writers, and Coordinating Officials.

Figure 127: Task Settings Administration Screen

Administrators are able to turn tasks "On" or "Off" for Fellows, Applicants, Reference Writers, and Coordinating Officials by choosing a start and end date for those tasks. If the current date falls between a task's start and end dates, then the task is "On" and will be indicated by a green checked icon. If the current date falls outside of a task's start and end dates, then the task is "Off" and will be indicated by a red X icon. When tasks are "On", the links to these functions will be available for the appropriate users.

To Edit a Task Setting:

1. Click the **Edit** link of a task.

Figure 128: Task Settings Screen

The Edit Task Dates screen will appear.

2. Enter or choose the new **Start** and **End Dates** for the Task and press Save.

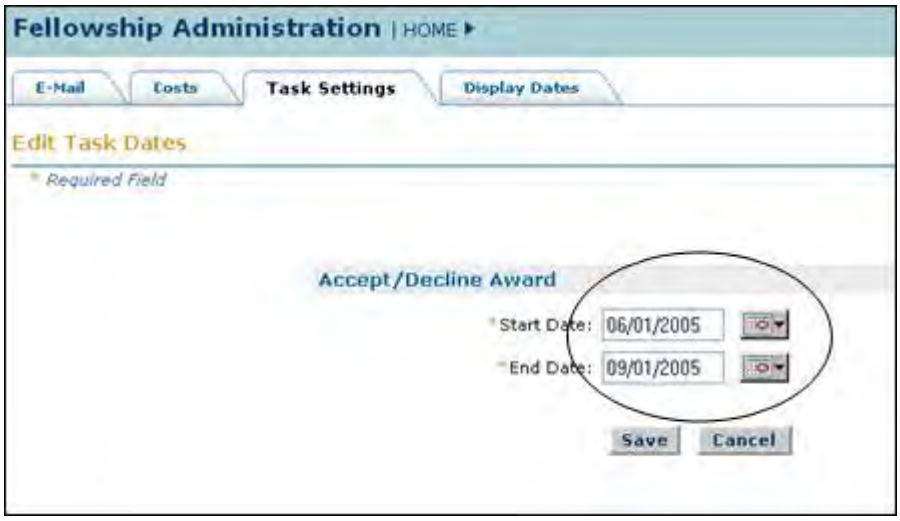


Figure 129: Edit Task Dates Screen

The Edit Task Dates screen will appear.

3. Choose to do one of the following:

   a. Continue

   b. Cancel

   c. Edit Academic Year

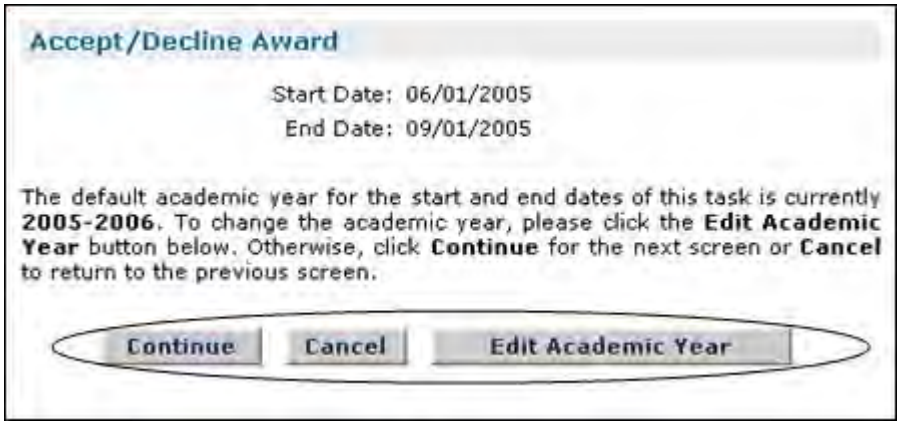


Figure 130: Accept/Decline Award Screen

If you choose to **Continue**, you will be accepting the default Academic Year provided by the system, and will be asked to confirm and save the new start and end dates that you entered:

Figure 131: Accept/Decline Award Task Screen 2

If you choose to **Cancel**, you will be returned to the initial task screen where you can enter the new start and end dates.

If you choose to **Edit** the Academic Year, you will be asked to enter in the New Value for Academic Year in YYYY-YYYY format.

Figure 132: New Academic Year Screen

Managing Display Dates

The **Display Dates** tab of the System Administration module allows the NSF Administrators to manage the dates that are displayed on various screens in the GRFP system. Administrators will be able to modify the display dates for Application Deadlines, Certification Page Deadlines, and Official Transcript Deadlines. Note, these dates that are modified in the Display Dates function are for display purposes only. For example, the Application Deadlines entered here are used by the system to display the Application Deadline dates on the main GRFP screen when the "Submit Application Package" task is "On" via the Task Settings function.

The table below describes where in the system each Display Deadline Date appears.

Display Deadline Date	Screen
Application Deadlines	Main GRFP home page screen when the Submit Application Package task is On Applicant - Check Application Package Status screen
Certification Page Deadline	Fellow – Accept/Decline Award screen
Official Transcripts Deadline	Applicant - Check Application Package Status screen

To Edit a Display Date:

1. Click the **Edit** link of a deadline date.

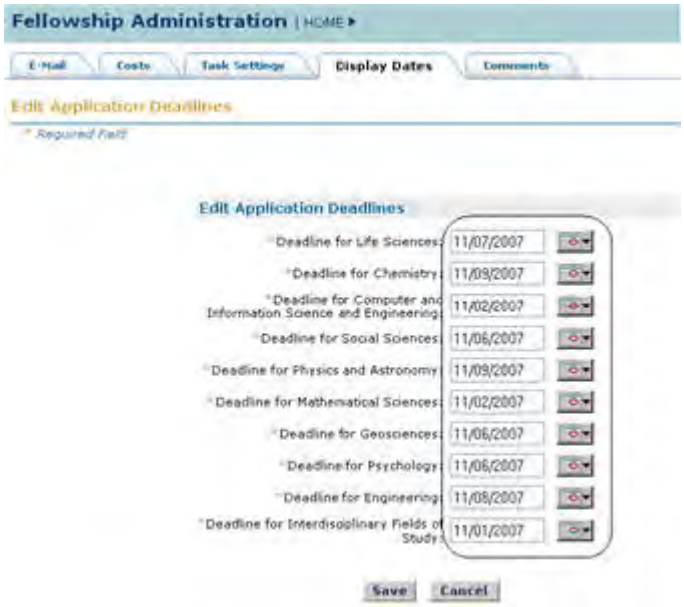


Figure 133: Display Dates Screen

The Edit Deadlines screen is displayed.

2. Enter or choose the new **Dates** for the Deadlines and press the **Save button**.

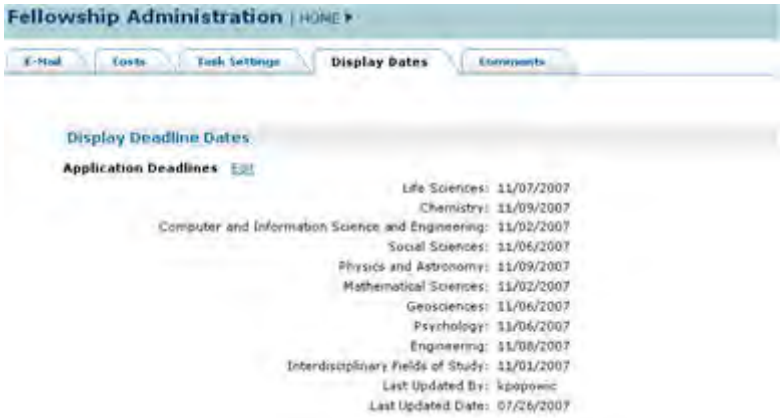


Figure 134: Edit Deadlines Screen

The Edit Application Deadlines Screen is displayed.

3. You will be asked to verify that you would like to edit the Deadlines as follows:

   a. Save

   b. Cancel

Figure 135: Edit Deadline Screen 2

If you choose **Save**, your edits will be committed to the system and you will be returned to the Display Dates main page.

If you choose **Cancel**, your edits will not be committed to the system and you will be returned to the Edit Deadline Screen to change the deadline dates or cancel out of the Edit Deadlines Screen.

Managing Comments

The Comments tab of the System Administration module allows NSF to manage the GRFP comments/advisories posted on the GRFP home page and individual module pages. The GRFP System will automatically display the comments entered in the corresponding module page based on the date range selected.

Figure 136: Cost Administration Screen

The table below describes where in the system each Comment appears.

Comment Type	Comment Type Descriptions	Module Displayed

APL	Fastlane GRFP Application Comments	Comments displayed on “Check Application Package Status” page
COR	Fastlane GRFP Coordinating Official Main Page Message	Comments displayed on the “Welcome GRFP Officials” home page
FLW	Fastlane GRFP Fellow Main Page Message	Comments displayed on the “Welcome Fellows” home page
GEN	Fastlane GRFP General Comments displayed on GRFP main page	Comments displayed on the GRFP main module page
REF	Reference Letters Comments	Comments displayed on “Check Application Package Status” page
TRS	Official Transcripts Comments	Comments displayed on “Check Application Package Status” page

To Edit a Comment and the display dates:

1. Click the **Edit** link of the Comment Type that needs to be edited.

Figure 137: Comments Administration Screen

The Edit Comments screen is displayed.

1. Enter or updated the text in the comments box.
2. Choose the new **Start Date and End Date** for the Comments to be displayed and press the **Save** button.

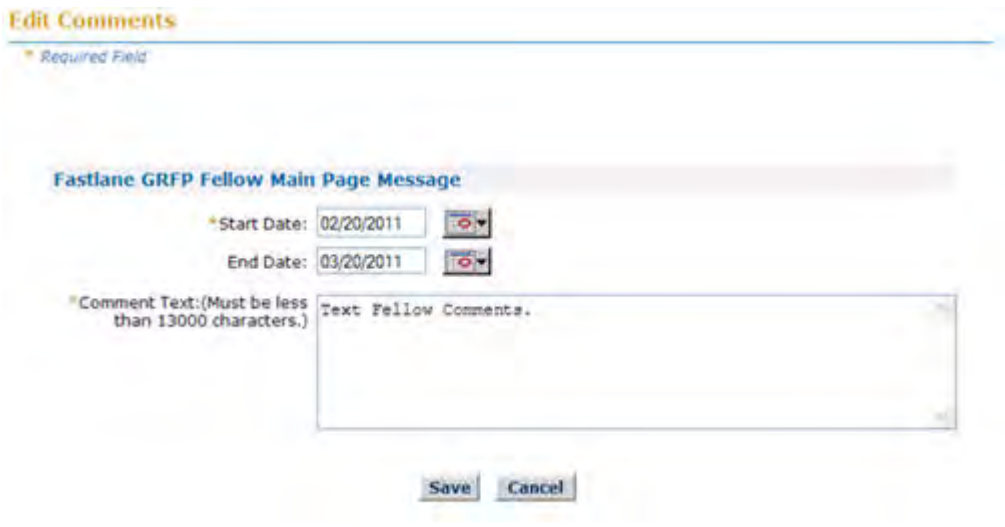


Figure 138: Edit Comments Screen

To View a Comment in read-only format:

3. Select the **View** link.

Figure 139: View Comments

Post Submission Changes

Post Submission Changes

There are four administration features that are available for managing the GRFP applications. They include Editing the Application, Uploading Applicant References, Viewing the Application Change Log, and Viewing/Printing an Application. The Post Submission features are available in your Post Submission Changes task list.

Figure 140: Post Submission Changes Screen

A description of each feature in the Post Submission Changes task list can be found in the sections below.

Edit Application

The **Edit Application** link allows the NSF Administrators to edit an Applicant Application regardless of the status of the application (submitted or unsubmitted). Administrators will be able to edit all applicant fields of the application. To Edit an Application press the **Edit Application** link.

Figure 141: Edit Application Link

The Edit Application screen will appear, which will allow you to search for a specific Applicant from the current application year using the Applicant ID number. You are also able to search for an applicant by Applicant Name (first and last) and by Applicant Email Address.

Figure 142: Edit Application Search Screen

Search results are then displayed where you are able to choose an Applicant's Application to edit for the current academic year. To edit an applicant's application, press the **Edit** link.

1,562 Applicants found, displaying 1 to 15 [Prev] 1, 2, 3, 4, 5, 6, 7, 8 [Next]

ApplicantID	Name	Application Year	Application Status	Final Status	Action
1000060446	test, test	2006	Unsubmitted		Edit
1000069799	test777, test	2006	Unsubmitted		Edit
1000059065	testa1, testa1 A	2006	Unsubmitted		Edit
1000059136	testa10, testa10 A	2006	Unsubmitted		Edit
1000065346	testa100, testa100 a	2006	Unsubmitted		Edit
1000065347	testa101, Testa101 A	2006	Submitted		Edit
1000065349	testa103, testa103	2006	Submitted		Edit
1000065350	testa104, testa104	2006	Submitted		Edit
1000065351	testa105, testa105 A	2006	Submitted		Edit
1000065352	testa106, testa106	2006	Unsubmitted		Edit
1000069797	Testa108, Testa108	2006	Withdrawn		
1000069798	testa109, testa109 A	2006	Submitted		Edit
1000059137	testa11, testa11 A	2006	Unsubmitted		Edit
1000070448	testa111, testa111	2006	Unsubmitted		Edit
1000070451	testa114, testa114	2006	Unsubmitted		Edit

Figure 143: Edit Application Search Results

Once the Applicant Application appears, you will be able to edit the following sections: Personal Profile, Education and Work Experience, Proposed Graduate Program, References, Personal Statements, Previous Work Experience, Proposed Plan of Research, and NSF GRFP Program Information. To edit those sections individually, press the **Edit** link next to each of the sections titles. You will be taken to the applicant's application where you are able to edit the various data fields.

Edit Application Search

PERSONAL PROFILE Edit

Prefix:
First Name: Test_first
Middle Name:
Last Name: Test_last
Suffix:
Previous Last Name 1:
Previous Last Name 2:
System Username: Test_first

Mailing Address

Street Address:
City:
State:
Zip:
Country:
Email: hkumarsw@nsf.gov
Phone Number: N/A

Figure 144: Edit Application Screen

Upload Applicant References

The **Upload Applicant References** link allows you to upload an Applicant's Reference letter in the event that the Referee had an issue uploading the reference letter. Once you have received a soft copy of the reference letter from a reference writer, you can upload the file for the reference writer through the admin system.

Figure 145: Upload Applicant References Link

To Upload an Applicant Reference Letter:

1. Select the **Upload Applicant References** link.

Once you select the **Upload Applicant References** link, a new screen will appear that will allow you to search for the reference writer's email address.

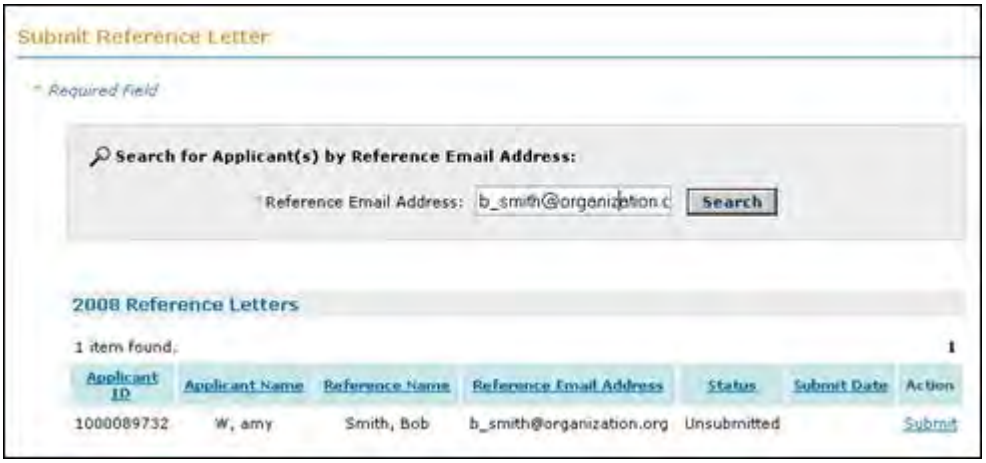


Figure 146: Submit Reference Letter Search Screen

2. Enter the reference writer's email address and **search** to find a list of all fellows that have requested a letter from this reference writer.

3. Select the **"Submit"** action in the appropriate row.

The Submit Reference Letter Screen is displayed.

Figure 147: Submit Reference Letter Screen

4. Click the **Continue** button to pass through the writing portion of the reference letter upload steps.

5. On the Select Confidentiality portion, make a selection and click the **Continue** button.

6. Upload the reference letter.

Upload the Reference Letter:

a. Either **type** the file location of the reference letter in the input box or click the **Browse** button to find the location of the file.

b. Click the **Upload** button to begin the upload process.

The PDF Conversion/Compliance Check screen is displayed. Please note this process may take a few minutes. Every 15 seconds this page will refresh to check the status of your file. During the upload process, the file is converted to a PDF. After successful conversion, the File Successfully Converted/Checked screen is displayed.

c. Proof-read the converted PDF file. Click the **Proofread PDF** button to proofread the converted file, paying special attention to ensure that all figures, graphics, tables, margins, page breaks, and other special formatting options have been accurately preserved.

A new window is opened to display the PDF file.
The Proofreading Complete screen is displayed.

d. Click the **Accept** button to accept the converted PDF file (However, if you detect any problems in the PDF file, you may cancel the upload by clicking on the **Cancel** button. The Referee may then correct the errors and resubmit the corrected version of his/her document.)

A confirmation will be displayed letting you know that you have successfully submitted the reference letter.

View Application Change Log

The **View Application Change Log** link allows the NSF Administrators to view all of the changes made to an applicant's application. Administrators will be able to view the before and after values where changes were made and the associated column name. To View the Application Change Log, press **the View Application Change Log** link.

Figure 148: View Application Change Log Link

The View Application Change Log screen will appear, which will allow you to search for a specific Applicant using the Applicant ID number. You are also able to search for an applicant by Applicant Name (first and last) and by Applicant Email Address.

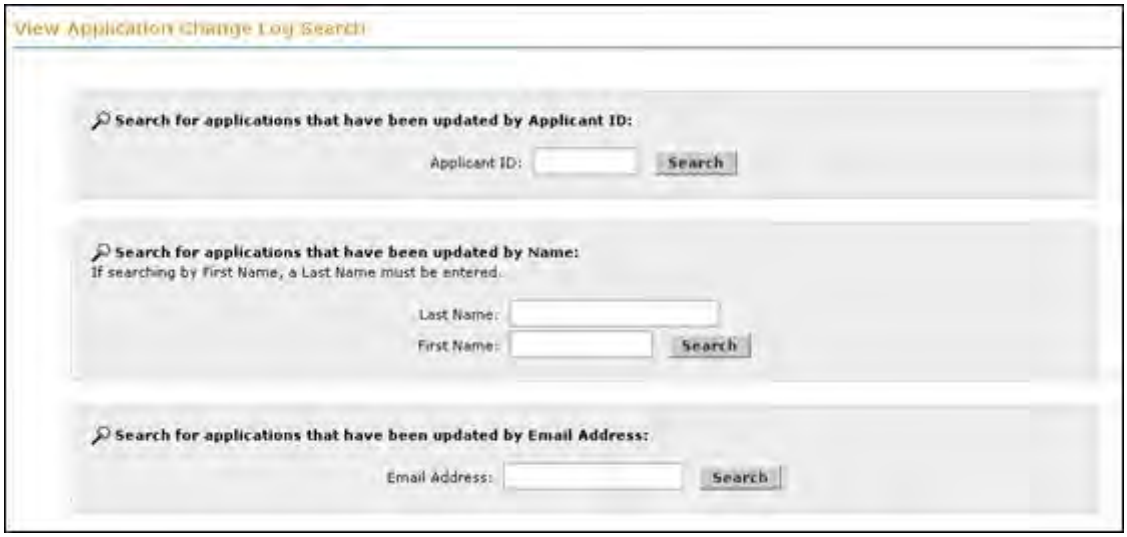


Figure 149: View Application Change Log Screen

Search results are then displayed where you are able to choose an Applicant's Application to view the applicant change log for the different academic years. To view an applicant's change log, press the **View Change Log** link.

30 Applicants found, displaying 1 to 15 [Prev] 1, 2 [Next]

ApplicantID	Name	Application Year	Application Status	Final Status	Action
1000034684	Test3, Test	2005	Submitted		View Change Log
1000059065	testa1, testa1 A	2006	Unsubmitted		View Change Log
1000065346	testa100, testa100 a	2006	Unsubmitted		View Change Log
1000065347	testa101, Testa101 A	2006	Submitted		View Change Log
1000065349	testa103, testa103	2005	Unsubmitted		View Change Log
1000065349	testa103, testa103	2006	Submitted		View Change Log
1000065350	testa104, testa104	2006	Submitted		View Change Log
1000065351	testa105, testa105 A	2005	Unsubmitted		View Change Log
1000065351	testa105, testa105 A	2006	Submitted		View Change Log
1000065352	testa106, testa106	2006	Unsubmitted		View Change Log
1000069798	testa109, testa109 A	2006	Submitted		View Change Log
1000059140	testa14, testa14 A	2006	Unsubmitted		View Change Log
1000059141	testa15, testa15 A	2006	Unsubmitted		View Change Log
1000060425	testa18, testa18 A	2006	Unsubmitted		View Change Log
1000059069	testa2, testa2	2006	Unsubmitted		View Change Log

Figure 150: View Change Log Screen

Once the Applicant Change Log appears, you will be able to view the following sections: Applicant Details, Change Action, Table, Last Updated Time Stamp, Last Updated User, and Action.

Figure 151: View Change Log Detail Screen

You will also be able to View the Change Log Details by pressing the **View Change Log Details** link.

Figure 152: Change Log Details Screen

View Application and Package Status/Application Reviews

The **View Application and Package Status / Application Reviews** link allows the NSF Administrators to view/print an application including associated uploaded statements and uploaded letters of reference. The link also allows NSF Administrators to view the application package status as it appears to the applicant and make edits to the reviews themselves. To View an application or an applicant's package status, press the **View Application and Package Status / Application Reviews** link.

Figure 153: View Application and Package Status/Application Reviews Link

The View Application and Package Status/Application Reviews screen will appear, which will allow you to search for a specific Applicant using the Application Year, Applicant ID, Applicant Name, Email Address and/or Proposed Research Title.

Figure 154: View Application and Package Status/Application Reviews Search Screen

Search results are then displayed by different fields to help assist you in finding the correct fellow or record. The Applicant ID, Name, Short Research Title, Application Year, Application Status, and Final Status are all displayed in the search results screen. Additionally you are able to choose to view an Application Package, Panel PDF or view (and then edit) an Application Review.

Figure 155: View Application and Package Status/Application Reviews Results Screen

To view an application, press the **Application Package** link. The complete application appears in PDF format.

Figure 156: View/Print Application Screen

To view the application package status, press the **Application Package Status** link.

Figure 157: Current Application Package Status Screen

Viewing Award Certification Forms

Viewing Award Certification Forms

The View Award Certification Forms task allows you to view the award certifications that were accepted by the awardee for a specific fellowship year. The View Award Certification Form task also allows you to search by academic year but defaults to the current academic year when opened.

Figure 158: View Award Certification Forms Admin Screen

View/Print Single Award Certification Form

To view/print single award certification forms:

1. Click on the **View Award Certification Forms** link.

The View Award Certification Forms Screen is displayed.

Figure 159: View Award Certification Forms Screen

2. Choose the fellow whose Award Certification Form you wish to view and press the **View/Print PDF** link.

The Fellows Award Certification Form is displayed in PDF format.

CERTIFICATIONS PAGE

There are five certifications which must be made before the National Science Foundation can authorize funds for a fellowship award. These concern 1) controlled substances; 2) delinquency on Federal debt; 3) debarment and suspension; 4) originality of the application; and 5) eligibility criteria

CERTIFICATIONS

I certify that:

☑ 1. I will not engage in unlawful manufacture, distribution, dispensing, possession or use of a controlled substance in the conduct of any activity with this fellowship award;

☑ 2. I am not delinquent on repayment of any Federal debt, and

3. To the best of my knowledge and belief:

☑ (a) I am not presently debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from covered transactions by any Federal department or agency;

☑ (b) I have not within a three-year period preceding my application been convicted of or had a civil judgment rendered against me for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State, or local) transaction or contract under a public transaction; violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;

☑ (c) I am not presently indicted for or otherwise criminally or civilly charged by a governmental entity (Federal, State or local) with commission of any of the offenses enumerated in paragraph (3) (b) of this certification; and

☑ (d) I have not within a three-year period preceding this application had one or more public transactions (Federal, State or local) terminated for cause or default.

☑ 4. The essays (personal statement, previous research experience and proposed plan of research) and proposed research in the application are my own original work.

☑ 5. I have read the NSF GRFP eligibility criteria and to the best of my knowledge and belief I certify that I am eligible for this fellowship.[See the Program Solicitation for eligibility criteria.]

By electronically signing the request, I am certifying that (a) the statements made herein are true and complete to the best of my knowledge; (b) I have not previously accepted an NSF Graduate Research or Predoctoral Fellowship; and (c) I agree to comply with NSF GRFP Fellowship terms and conditions if the request is granted.

Willful provision of false information in this request and its supporting documents or in reports required under an ensuing award is a criminal offense (U.S. Code, Title 18, Section 1001).

Figure 160: Fellows Award Certification Form

Once the fellows Award Certification Form is displayed in PDF format, you are able to print off the Award Certification Form for administrative purposes.

View/Print All Award Certification Forms

To view/print all award certification forms:

1. Click on the **View Award Certification Forms** link.

The View Award Certification Forms Screen is displayed.

Figure 161: View Award Certification Forms Screen 2

2. Choose the **View/Print All PDFs** button to view/print off all of the award certification forms for a particular academic year.

Once the Fellows Award Certification Forms are displayed in PDF format, you are able to print off the Award Certification Forms for administrative purposes.

Track CO Activities

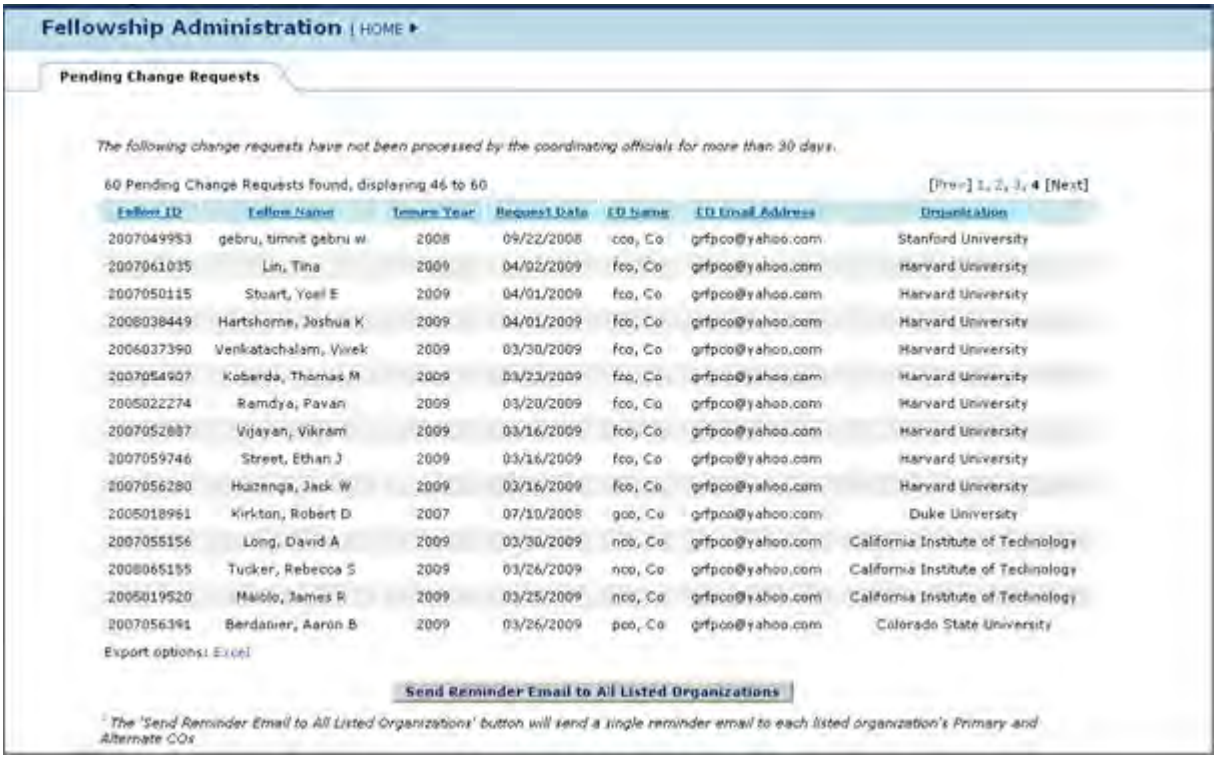
Track CO Activities

The Track CO Activities task allows you to monitor CO progress against regular activities. The Track CO Activities task also allows you to send reminder emails to COs to complete outstanding activities.

Figure 162: Track CO Activities Admin Link

Pending Change Requests

The Pending Change Requests report allows you to see a report of all Fellowship Status Change Requests that have been in the CO pending state for over 30 days. The email addresses of the Primary COs at the associated schools are listed in this report for your convenience. In the event the organization does not have a Primary CO, the Secondary CO will be listed. You can contact each of these COs using an external email account at any time. To a single reminder email to each listed organization's Primary and Secondary COs, click the 'Send Reminder Email to **All Listed Organizations'** button.



Fellowship Administration | HOME ▸

Pending Change Requests

The following change requests have not been processed by the coordinating officials for more than 30 days.

60 Pending Change Requests found, displaying 46 to 60 [Prev] 1, 2, 3, 4 [Next]

Fellow ID	Fellow Name	Tenure Year	Request Date	CO Name	CO Email Address	Organization
2007049953	gebru, timnit gebru w	2008	09/22/2008	coo, Co	grfpco@yahoo.com	Stanford University
2007061035	Lin, Tina	2009	04/02/2009	fco, Co	grfpco@yahoo.com	Harvard University
2007050115	Stuart, Yoel E	2009	04/01/2009	fco, Co	grfpco@yahoo.com	Harvard University
2008038449	Hartshorne, Joshua K	2009	04/01/2009	fco, Co	grfpco@yahoo.com	Harvard University
2006037390	Venkatachalam, Vivek	2009	03/30/2009	fco, Co	grfpco@yahoo.com	Harvard University
2007054907	Koberda, Thomas M	2009	03/23/2009	fco, Co	grfpco@yahoo.com	Harvard University
2005022274	Ramdya, Pavan	2009	03/20/2009	fco, Co	grfpco@yahoo.com	Harvard University
2007052887	Vijayan, Vikram	2009	03/16/2009	fco, Co	grfpco@yahoo.com	Harvard University
2007059746	Street, Ethan J	2009	03/16/2009	fco, Co	grfpco@yahoo.com	Harvard University
2007056280	Huizenga, Jack W	2009	03/16/2009	fco, Co	grfpco@yahoo.com	Harvard University
2005018961	Kirkton, Robert D	2007	07/10/2008	goo, Co	grfpco@yahoo.com	Duke University
2007055156	Long, David A	2009	03/30/2009	nco, Co	grfpco@yahoo.com	California Institute of Technology
2008065155	Tucker, Rebecca S	2009	03/26/2009	nco, Co	grfpco@yahoo.com	California Institute of Technology
2005019520	Maiolo, James R	2009	03/25/2009	nco, Co	grfpco@yahoo.com	California Institute of Technology
2007056391	Berdanier, Aaron B	2009	03/26/2009	pco, Co	grfpco@yahoo.com	Colorado State University

Export options: Excel

Send Reminder Email to All Listed Organizations

The 'Send Reminder Email to All Listed Organizations' button will send a single reminder email to each listed organization's Primary and Alternate COs

Figure 163: Pending Change Requests Screen

View Application and Package Status

The **View Application and Package Status** link allows the NSF Administrators to view/print an application including associated uploaded statements and uploaded letters of reference. The link also allows NSF Administrators to view the application package status as it appears to the applicant. To View an application or an applicant's package status, press the **View Application and Package Status** link.

Figure 123: View Application and Package Link

The View Application and Package Status screen will appear, which will allow you to search for a specific Applicant using the Application Year and Applicant ID. You are also able to search for an applicant by Applicant Name (first and last) and by Applicant Email Address.

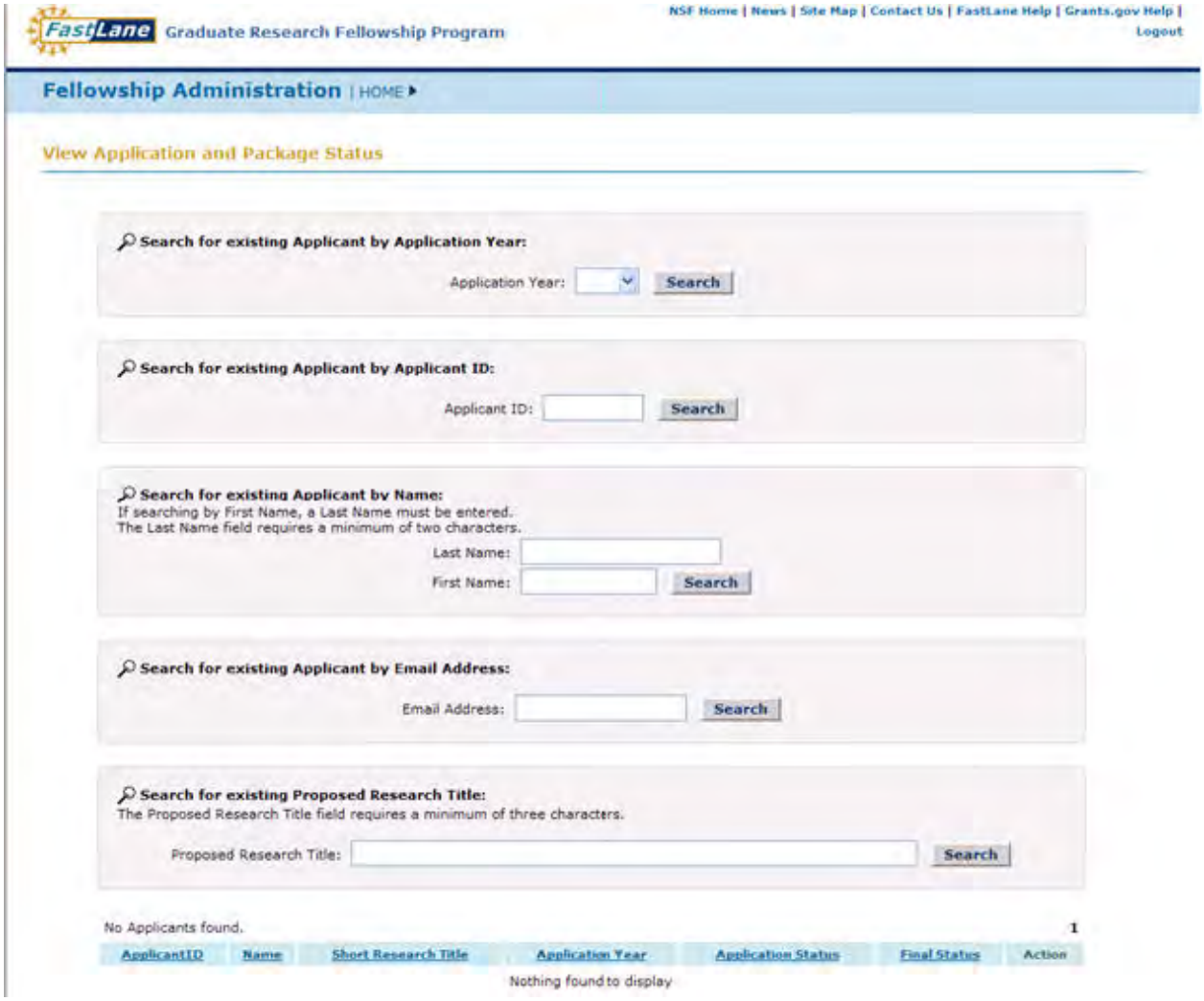


Figure 124: View Application and Package Status Search Screen

Search results are then displayed where you are able to choose an application to view the application for the chosen academic year, or view the application package status as it appears to the applicant.

1,268 Applicants found, displaying 1 to 15 [Prev] 1, 2, 3, 4, 5, 6, 7, 8 [Next]

ApplicantID	Name	Application Year	Application Status	Final Status	Action
1000054220	testera1, testera1	2007	Unsubmitted		Application | Application Package Status
1000054445	testera2, testera2	2007	Unsubmitted		Application | Application Package Status
1000054437	testprem, premtest	2007	Unsubmitted		Application | Application Package Status
1000054467	testera17, testera17 A	2007	Unsubmitted		Application | Application Package Status
1000054468	testera18, testera18 A	2007	Unsubmitted		Application | Application Package Status
1000054478	tester, joe d	2007	Unsubmitted		Application | Application Package Status
1000054446	testera3, testera3	2007	Unsubmitted		Application | Application Package Status
1000054450	testera4, testera4	2007	Unsubmitted		Application | Application Package Status

Figure 125: View Application and Package Status Results Screen

To view an application, press the **Application** link. The View/Print Application screen displays.

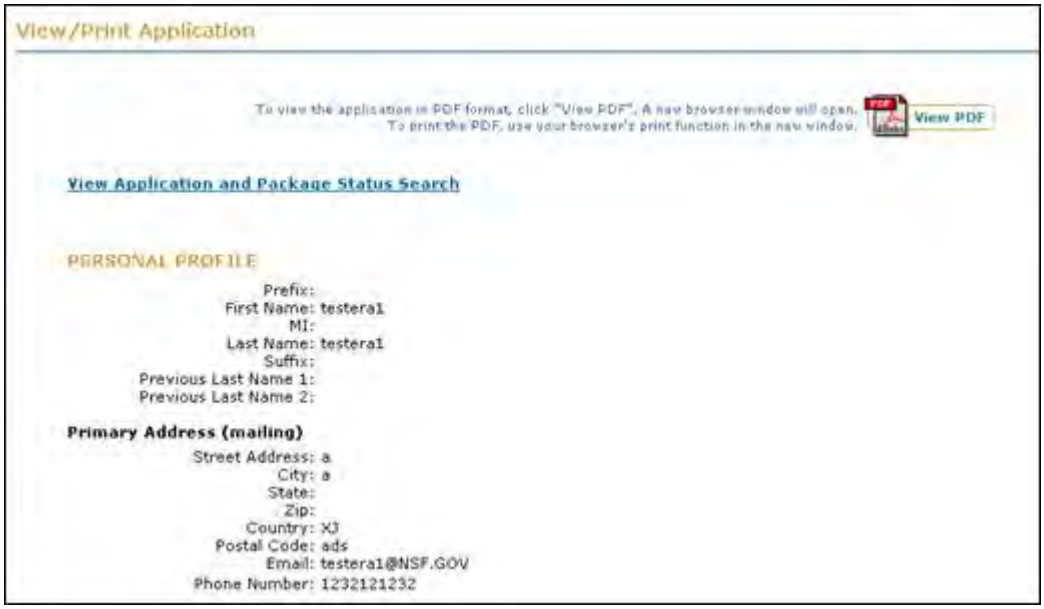


Figure 126: View/Print Application Screen

To view the application package status, press the **Application Package Status** link.

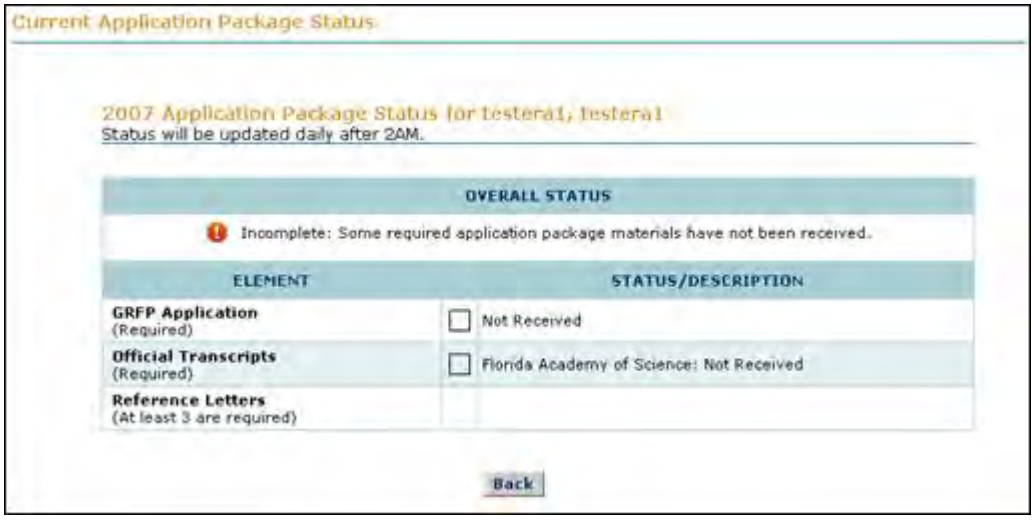


Figure 127: Current Application Package Status Screen

GRFP Official User Guide

GRFP Official User Guide

Conventions used in this guide

The first time they are introduced, names of on-screen features appear in bold.

EXAMPLE: Click on the **Search** tab.

Uniform Resource Locators (URLs) are in bold characters and are underlined.

EXAMPLE: Type the following address in your browser's address bar: http://fastlane.nsf.gov.

Many software features and some business processes are explained in a reference table format. An on-screen term appears in the left column and a description of the term appears in the right column.

EXAMPLE:

Feature	Description
Applicant ID	The Applicant ID is the number assigned to you when you become an applicant.

The following three conventions serve as both examples and descriptions:

WARNING: Warnings provide information designed to prevent critical errors from occurring. If you see a warning, stop and read it before continuing.

NOTE: While Notes do not describe critical information, we suggest that you stop and read them, too. The information in a note can prevent minor errors from occurring. Other notes simply provide information designed to deepen your understanding of a software feature.

TIP: Tips provide information designed to increase your productivity.

Getting Access

Getting Access

Logging In

1. Access the GRFP application by typing the following address into your browser address bar: http://www.fastlane.nsf.gov/grfp

Figure 1: GRFP Officials Log In

2. Type your last name in the Last Name field.

3. Type your NSF ID in the NSF ID field.
4. Type your password in the Password field.
5. Click the Login button.

The GRFP home page appears with your Task List and current Profile.

NOTE: If your password has expired or if you logged in with a temporary password, you will be redirected to Research.gov. Click here to access the Research.gov Help System and learn more about the password functions.

1. Authenticate by logging in to Research.gov with your Last Name, NSF ID, and expired or temporary password.
2. To change your password, enter your expired or temporary password, your New Password, and Confirm your New Password.
3. Click the Change Password button.
4. A confirmation screen will be displayed.
5. Click the Continue to FastLane button to return to FastLane.

Looking up your NSF ID

NSF now requires that users use an assigned NSF ID rather than their Social Security Number to login. To lookup your NSF ID:

1. Click on the Lookup NSF ID link found under the Login button.
2. Enter your First Name, Last Name, Email Address and Organization (optional)
3. Select Submit

Your NSF ID will appear on the next screen. Make note of this NSF ID as this will be what you will use to login to the Graduate Research Fellowship System in the future.

Figure 2: NSF ID Lookup Screen

Retrieving a Forgotten Password

1. Click on the Forgot Password link found under the Login button. Refer to Figure 1 above.
2. You will be redirected to Research.gov. Click here to access the Research.gov Help System and learn more about the password functions.
3. Enter your NSF ID.
4. Click the Send Temporary Password button.
5. A confirmation screen will be displayed and the system will e-mail a temporary password to your registered e-mail address.
6. Once you receive the e-mail, authenticate by logging in to Research.gov with your Last Name, NSF ID, and temporary password.
7. To change your password, enter your temporary password, your New Password, and Confirm your New Password.
8. Click the Change Password button.
9. A confirmation screen will be displayed.
10. Click the Continue to FastLane button to return to FastLane.

Changing Your Password

1. Select the Change Password link from the upper-right navigation bar.

Figure 4: Change Password Link

2. You will be redirected to Research.gov. Click here to access the Research.gov Help System and learn more about the password functions.
3. Authenticate by logging in to Research.gov with your Last Name, NSF ID, and current password.
4. To change your password, enter your current password, your New Password, and Confirm your New Password.
5. Click the Change Password button.
6. A confirmation screen will be displayed.
7. Click the Continue to FastLane button to return to the GRFP home page.

NOTE: Password length must be between 6 and 20 characters. The password must contain at least one alphabetic and one numeric character. Passwords are not case sensitive. You cannot reuse the last three passwords you have used. Passwords

expire every 365 days. Passwords for users with Financial Functions permissions expire every 120 days..

Mandatory Password Change

A Mandatory Password Change is required under any of the following conditions:

a. You have not voluntarily or optionally changed your password prior to its expiration date every 180 days.

b. Your password has expired (every 180 days) or will expire within in 10 days.

c. You forgot your password and FastLane reset it.

d. You have already Self-Registered in FastLane.

Logging Out

Once you have logged into the GRFP application, a Logout link is available in the upper-right navigation bar.

Figure 7: Logout Link

To exit the application at any time, click on the Logout link. The web browser returns to the GRFP login page.

Understanding Your Profile

Your profile area details your current user profile information. Contact your SRO to make a request for changes to your profile. The list below describes each feature in your profile.

Figure 8: My Profile Screen

The list of all fields available in your profile and a description of each is described below:

Feature	Description
Organization	The Organization field indicates the university/college for which you are designated as a Coordinating Official or GRFP Financial Official. This field is not editable and may not be changed through the application.
Name	The Name field includes your first name, middle initial, last name, suffix, and maiden name. Your first and last names are required fields.

Email	The Email field is your primary email address and is used to send all system-generated and GRFP related emails. Please ensure your email address is kept up-to-date so that all electronic correspondence reaches you in a timely manner.
Phone	The Phone field is your primary phone number and will used by GRFP for any telephone correspondence. Please ensure this phone number is kept up-to-date so that NSF may contact you, if needed.

GRFP Officials Tasks

GRFP Officials Tasks

Coordinating Officials, Financial Officials and their alternates manage all fellowship related activities including the Program Expense Report which is adjusted and submitted by GRFP Financial Officials. Once you have logged in, you will see links to all the tasks administered by a GRFP Official through the FastLane system in your Task Lists.

Understanding Your Task List

Your task list area has two different sections. The “Task List” contains tasks that are pending your approval or that are currently due. These actions include: verify satisfactory progress/reserve status, approving tenure requests, approving travel requests, viewing a list of activities reports not yet submitted and adjusting/submitting a Program Expense Report.

The “Optional Task List” contains features that you may use and access at anytime. This functionality includes: viewing your organization’s fellows for the current fellowship year, submitting Program Expense Reports for prior years,viewing grants roster reports, viewing Program Expense Reports, and viewing fellow information.

Figure 9: CO Task List

The list of all possible tasks that may appear in your task list and a description of each is provided below:

Feature	Description
Verify Satisfactory Progress/Reserve Status	The Verify Satisfactory Progress/Reserve Status task needs to be completed each year for fellows at your organization who are on tenure or on reserve. For fellows on tenure, this task allows you to submit a satisfactory or unsatisfactory rating for each fellow that is eligible to declare for the coming year. For fellows on reserve, you must submit a reserve verification. This task is available approximately January through May of each year.

Approve Fellowship Status Requests	The Approve Fellowship Status Requests task must be completed each time a fellow has submitted a tenure, organization, or field of study change request that requires your approval. The number of requests pending your approval is displayed next to the task.
Activities Reports Not Submitted	The Activities Reports Not Submitted provides a report of all fellow activities reports that have not yet been submitted. You may use this task to keep track of fellow progress on completing Activities Reports.
Adjust/Submit current year Program Expense Report	The Adjust/Submit Program Expense Report task must be completed once a year for new Program Expense Reports. This task allows you to view, adjust, and validate the yearly costs for the fellows at your organization. Please note that adjustments you make to the Fellow records in the Expense Report remain separate from individual Fellow records until the Report is approved. Individual Fellow records will be updated to reflect the changes made upon NSF approval.
Adjust/Submit Prior Year Program Expense Reports	Program Expense Reports for the four fiscal years prior the most recent fiscal year can be adjusted and resubmitted at any point. This task allows you to view, adjust, and validate the yearly costs for the fellows at your organization.
Adjust/Submit Fellow Completion Report	The Adjust/Submit Fellow Completion Report task must be completed once a year and can only be submitted by the institutions Coordinating Official. This task allows you to provide fellow graduation data annually to the NSF.
View Fellowship Year Fellows Report	The View Fellowship Year Fellows Report task is available at all times. This task allows you to view a report of all fellows at your organization for the current fellowship year.
View Grants Roster Report	The View Grants Roster Report task is available at all times. This task allows you to view the current Grants Roster Report as well as previous Grants Roster Reports for your organization beginning with the 2008-2009 Fellowship Year.
View Program Expense Reports	The View Program Expense Reports task is available at all times. This task allows you to view all versions of the Program Expense Reports that exist for your organization. You may use this task to keep track of the details and status of Program Expense Reports that are modified and submitted by GRFP Financial Officials.

View Fellow Information	The View Fellow Information task is available at all times. This task allows you to view information on fellows associated with your organization. You may use this feature to view the fellow's tenure records, previous tenure change requests, and previous travel requests.

Managing Fellowship Status Requests

Fellows may submit tenure change requests for their current year's tenure at any time during the year. Fellows may also request tenure changes while they are declaring their tenure plans for the next year. A tenure request includes changes to the fellow's organization, field of study, or Fellowship Status. When a fellow at your organization submits a tenure request, you will be required to approve or disapprove the request. Once the fellow has submitted the request, you will be notified via email that a request has been submitted for your approval. After receiving the email notification, you may log into the GRFP application to review and take action on the request. Your task list will display the number of tenure requests pending your approval next to the Approve Fellowship Status Request link.

Figure 10: Approve Fellowship Status Requests Link

Approving Fellowship Status Change Requests

When you select to approve tenure change requests, a list of all pending requests is displayed. Once you select a request to approve, the details of the request will be displayed and you will have the option to approve or disapprove the request.

To Approve a Tenure Change Request:

1. Select Approve Fellowship Status Request link from your Task List.

The list of all pending requests is displayed, including the fellow's name, fellow id, the fellowship year the request is for, and the request date. The list of requests can be sorted by clicking any of the column headings in order to sort the list by that column.

If You Wish to Search for a Specific Request:

1. Enter the fellow ID or the last name of the fellow whose request you wish to search for in the Search box area.

Figure 11: Fellowship Status Requests Search Box

2. Click the Search button.

The matching results are displayed in the requests list.

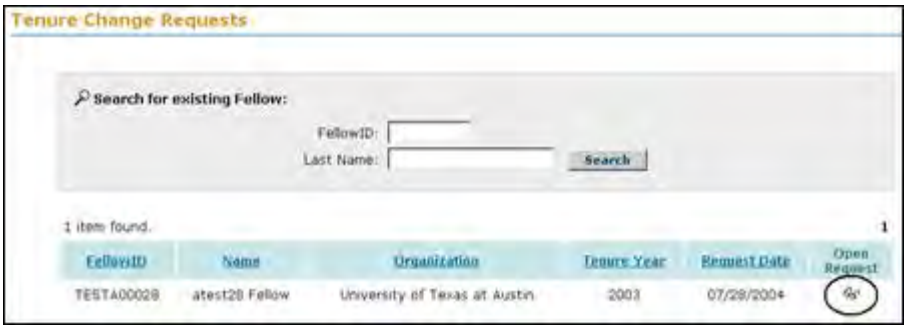


Figure 12: Pending Fellowship Status Requests List and Open Request Icon

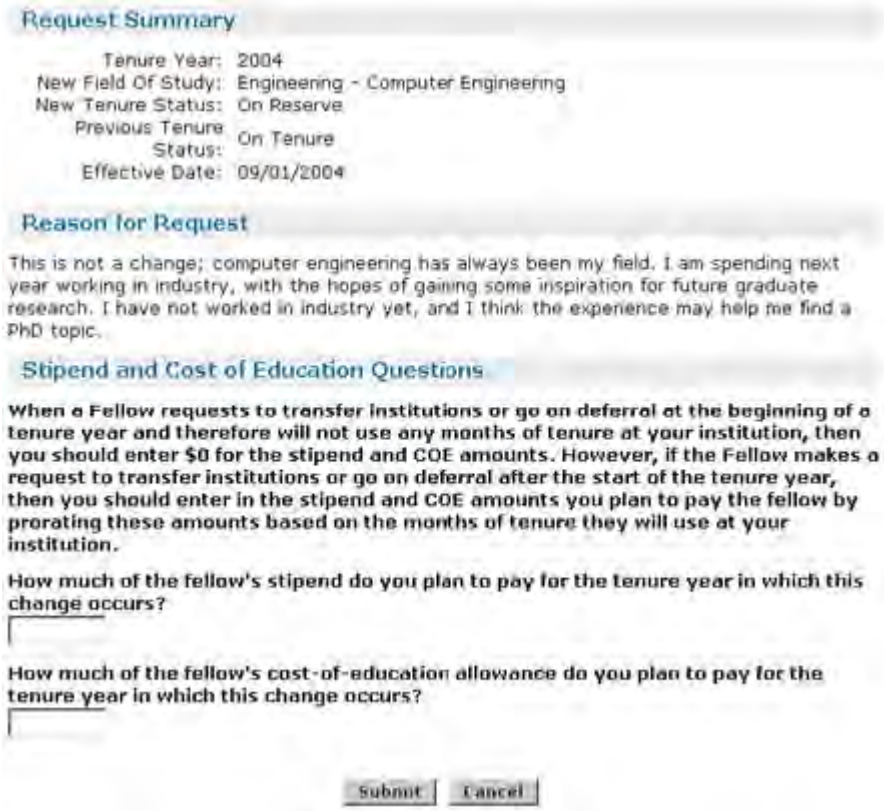
3. Open a request by clicking on the open request icon.

The request details are displayed. The information that is displayed in the request details will vary depending on the type of tenure change request the fellow has submitted. In all cases, the old organization, field of study, or Fellowship Status will be displayed as well as the requested changes. For organization and Fellowship Status changes, an effective date and fellowship year start date will also be displayed.

Figure 13: Example Fellowship Status Change Request

4. Click the Approve button.

If you are approving an organization change or a Fellowship Status change, an additional screen is displayed. This screen asks you to input the amount of stipend and cost-of-education allowance you will be paying the fellow prior to their transfer. If you are approving a field of study change, this screen will not be displayed.



Request Summary

Tenure Year: 2004
New Field Of Study: Engineering - Computer Engineering
New Tenure Status: On Reserve
Previous Tenure Status: On Tenure
Effective Date: 09/01/2004

Reason for Request

This is not a change; computer engineering has always been my field. I am spending next year working in industry, with the hopes of gaining some inspiration for future graduate research. I have not worked in industry yet, and I think the experience may help me find a PhD topic.

Stipend and Cost of Education Questions

When a Fellow requests to transfer institutions or go on deferral at the beginning of a tenure year and therefore will not use any months of tenure at your institution, then you should enter $0 for the stipend and COE amounts. However, if the Fellow makes a request to transfer institutions or go on deferral after the start of the tenure year, then you should enter in the stipend and COE amounts you plan to pay the fellow by prorating these amounts based on the months of tenure they will use at your institution.

How much of the fellow's stipend do you plan to pay for the tenure year in which this change occurs?

How much of the fellow's cost-of-education allowance do you plan to pay for the tenure year in which this change occurs?

Submit Cancel

Figure 14: Stipend and COE Questions

5. Enter the stipend and COE amounts.

WARNING: Enter the stipend and COE amounts you plan to pay the fellow for the fellowship year the change has been requested for. If a fellow is requesting a change to their organization or going on deferral for the next fellowship year, you should enter $0 for the stipend and COE amounts.

6. Click the Submit button.

7. A confirmation screen is displayed indicating you have successfully approved the tenure request. You may select the CO Home Page link to return to your home page and task list. Once you have approved the tenure request, it will be forwarded to NSF for review and approval and the request will no longer appear in your pending tenure requests list. An email will also be sent to the fellow indicating that their CO has approved the request and that the request has been forwarded to NSF for approval.

NOTE: Mid-Year requests involving an Organization change require approval by Coordinating Officials at both Organizations prior to NSF approval. Start of Year requests involving an Organization change only require the approval of the Proposed Organization prior to NSF approval.

NOTE: The fellow's tenure details will reflect the last approved status, whether the request is to occur immediately or occur in the future. If it is a tenure change request that has been approved to occur immediately, it will be reflected as such in the Current Fellow Status. If it is a tenure change request that has been approved to happen in the

future (ex. The fellow is currently on tenure as of November but as of January they will be on reserve), the tenure details will reflect that they are on reserve (the last approved status), while the Current Fellow Status will reflect that they are on tenure (current status).

Disapproving Fellowship Status Requests

In some cases, it may be necessary to disapprove a change a fellow has requested. When you disapprove a fellow's change request, an email is sent to the fellow with the disapproval notification and reason.

To Disapprove a Tenure Change Request:

1. Select the Approve Fellowship Status Request link from your Task List.

The list of all pending requests is displayed, including the fellow's name, fellow id, the fellowship year the request is for, and the request date. The list of requests can be sorted by clicking any of the column headings in order to sort the list by that column.

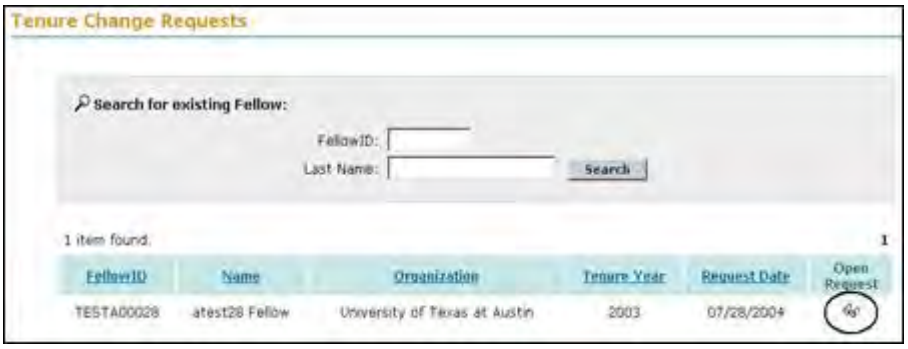


Figure 15: List of Pending Fellowship Status Change Requests

2. Select a request to view by clicking the open request icon.

The request details are displayed. The information that is displayed in the request details will vary depending on the type of tenure change request the fellow has submitted. In all cases, the old organization, field of study, or Fellowship Status will be displayed as well as the requested changes. For organization and Fellowship Status changes, an effective date and fellowship year start date will also be displayed.

3. Click the Disapprove button.

The Disapproval Reason screen is displayed with a field available for you to enter the reason you are disapproving the change request. The reason you enter in this screen will be sent in a disapproval notification email that is sent to the fellow.

Figure 16: Tenure Change Request Disapproval Reason Screen

4. Enter a disapproval reason.

NOTE: The disapproval reason must be less than 255 characters.

5. Click the Submit button.

A confirmation screen is displayed indicating you have successfully disapproved the tenure request. You may select the CO Home Page link to return to your home page and task list. The request will no longer appear in your pending requests list. Once you have disapproved the tenure request, an email will be sent to the fellow informing them that their tenure change request has been disapproved. For mid-year change requests involving an Organization change, an email will also be sent to the Coordinating Official from the other Organization.

Managing Additional Funding Opportunities Requests

Starting with the 2013-2014 fellowship year, Fellows can submit requests for additional funding opportunities. When a fellow submits an additional funding opportunity request, you will be required to approve or disapprove the request. Additional funding opportunity requests submitted by fellows are first sent to COs for approval before being forwarded to NSF for approval. These items will be available in your task list once the Fellow has submitted the request. Your task list will display the number of funding opportunities requests pending your approval next to the **Approve Additional Funding Opportunities Request** link.

Figure 8: Approve Additional Funding Opportunities Request Link

Approving Additional Funding Opportunities Requests

When you select to approve Additional Funding Opportunities Requests, a list of all pending requests is displayed. Once you select a request to approve, the details of the request will be displayed.

Figure 9: Approve Additional Funding Opportunities Request Screen

Once you have reviewed and approved the request, an email will be sent to the fellow and the Fellow informing them that the additional funding opportunities request has been approved by the Coordinating Official. The request will then move to NSF for final approval. After you have approved the request, it will no longer appear in your pending requests list.

Note: Selecting the Fellow ID link will open a new browser window displaying the Fellow's detailed Fellowship Status record. You may view and edit historical tenure information from the Fellow's detailed Fellowship Status record.

Disapproving Additional Funding Opportunities Requests

In some cases, it may be necessary to disapprove an additional funding opportunities request that a fellow has submitted. If you select to disapprove the request, the system will prompt you to enter a disapproval reason. Once you have entered the disapproval reason, an email will be sent to the fellow alerting him/her that the request has been disapproved and the reason for the disapproval. After the request has been disapproved, it is no longer available in your pending requests list.

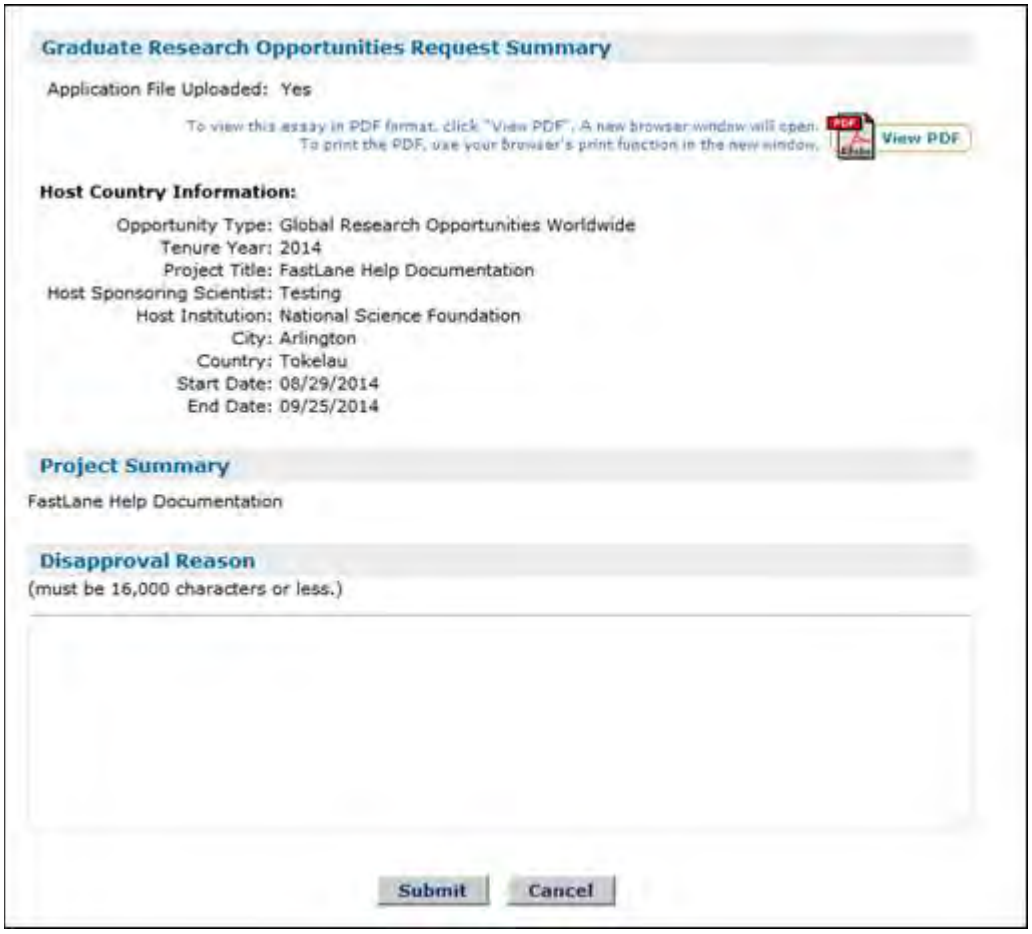


Figure 11: Disapproving Additional Funding Opportunities Request Screen

Managing Activity Report Completion

Coordinating Officials can track fellow's completion of annual activity reports using the Activities Reports Not Submitted report system.

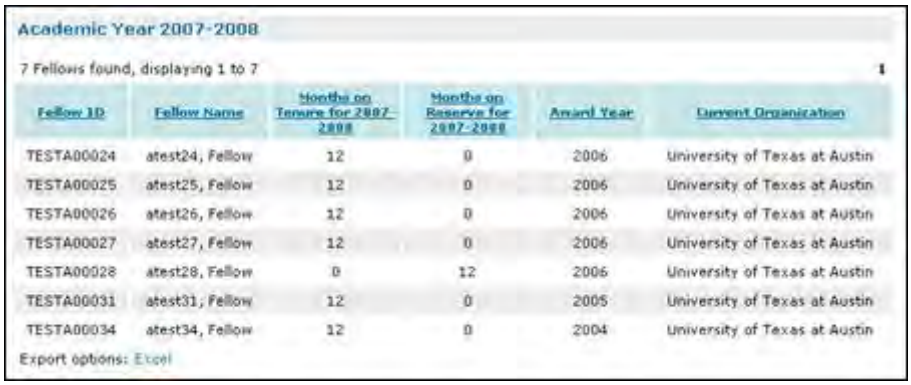
1. In your Coordinating Official Task list, click Activities Reports Not Submitted.

Figure 24: Activities Reports Not Submitted Link

2. Select an academic year in the dropdown list to search, and click the Search button.

Figure 25: Activities Reports Not Submitted Academic Year Search

A list of the fellows who have not yet submitted their Activity Report for that fellowship year displays.



Academic Year 2007-2008

7 Fellows found, displaying 1 to 7

Fellow ID	Fellow Name	Months on Tenure for 2007-2008	Months on Reserve for 2007-2008	Award Year	Current Organization
TESTA00024	atest24, Fellow	12	0	2006	University of Texas at Austin
TESTA00025	atest25, Fellow	12	0	2006	University of Texas at Austin
TESTA00026	atest26, Fellow	12	0	2006	University of Texas at Austin
TESTA00027	atest27, Fellow	12	0	2006	University of Texas at Austin
TESTA00028	atest28, Fellow	0	12	2006	University of Texas at Austin
TESTA00031	atest31, Fellow	12	0	2005	University of Texas at Austin
TESTA00034	atest34, Fellow	12	0	2004	University of Texas at Austin

Export options: Excel

Figure 26: Activities Reports Not Submitted Report

Verifying satisfactory progress/reserve status

Each year, you are required to submit either a satisfactory or unsatisfactory rating for each of the fellows that are on tenure at your organization that are eligible to declare for the coming year. You must also submit a reserve verification for all fellows who are on reserve at your organization.

You will be notified via email each year to alert you as to when progress may be verified. Once you have received the email notification, you may logon to the GRFP application and the Verify Satisfactory Progress/Reserve Status link will be available in your task list. The task list will also display the number of fellows that have pending ratings.

Verifying Satisfactory Progress

A satisfactory progress rating for a fellow indicates that a fellow is making satisfactory progress in their studies and should be eligible to use tenure the next year. If a fellow is on tenure during the academic year, they must have a satisfactory rating verified for them before they are eligible to use tenure during the next academic year. Under the On Tenure "academic year" tab is the list of fellows that are eligible to use tenure the next year that need their progress verified. The academic year will change each year and will reflect the appropriate academic year for which you should review to verify satisfactory progress by the Fellow.

To Verify Satisfactory Progress:

1. Select the Verify Satisfactory Progress/Reserve Status link from your task list.

A list of all fellows who are on tenure, are eligible to declare for the coming year, and who have pending ratings is displayed. You may sort the list by clicking each of the column headings to sort the list by that column.

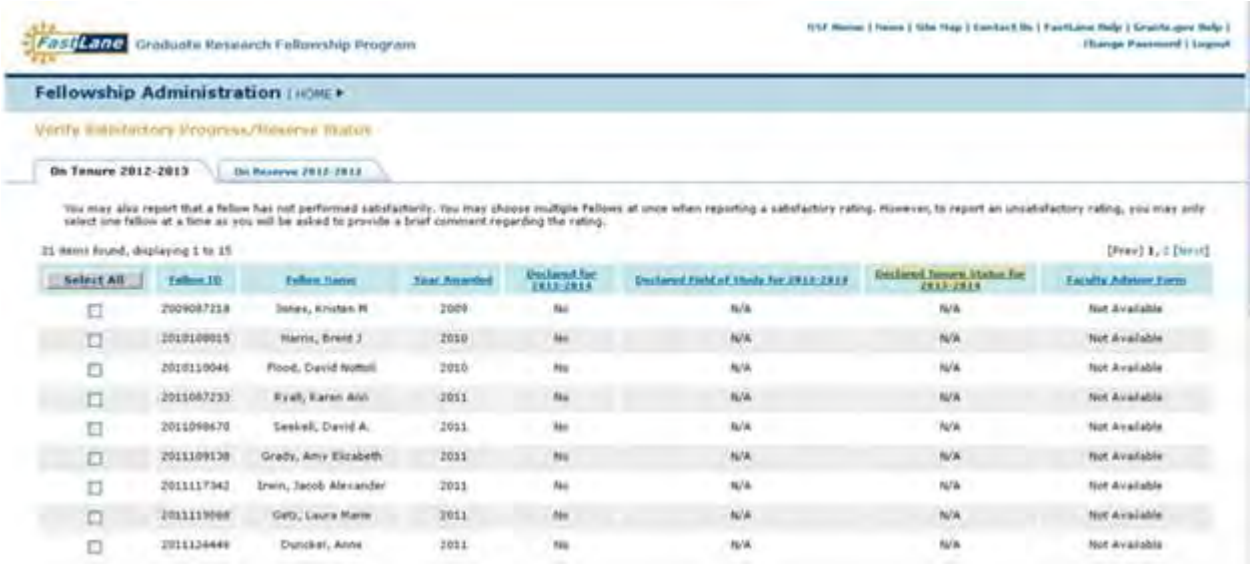


Figure 27: Fellow's Rating List – On Tenure

2. Select the fellow(s) you wish to verify progress for by selecting the checkbox next to the fellow's name.

If you wish to select all fellows, you may click the Select All button at the top of the checkbox column.

Figure 28: Select All Fellows Button

3. Click the Satisfactory button.

A screen is displayed which lists the selected fellows and the satisfactory progress statement.

Figure 29: List of Fellows and Satisfactory Rating Statement

4. Click the Agree and Submit button.

A confirmation screen is displayed indicating you have successfully verified satisfactory progress for the selected fellows. You may select the CO Home Page link to return to your home page and task list. Once you verified satisfactory progress for a fellow, that fellow will no longer appear in your pending ratings list.

Figure 30: Not Available Dialog Box

5. To View Faculty Advisor Form.

Select the 'view' hyperlink associated with the with fellow whose Faculty Advisor Form you wish to view. If the fellow has not yet uploaded a Faculty Advisor Form 'Not Available' will be displayed in this column.

Verifying Unsatisfactory Progress

An unsatisfactory rating for a fellow indicates that a fellow is not making satisfactory progress in their studies and should be not eligible to use tenure the next year until the issue is resolved. Once you have verified unsatisfactory progress for a fellow, NSF will be notified and may contact you to discuss the rating.

To Verify Unsatisfactory Progress:

1. Select the Verify Satisfactory Progress/Reserve Status link from your task list.

A list of all fellows who are on tenure, are eligible to declare for the coming year, and who have pending ratings is displayed. You may sort the list by clicking each of the column headings to sort the list by that column.

Figure 31: Fellow's Rating List – On Tenure

2. Select the fellow you wish to verify progress for by selecting the checkbox next to the fellow's name.

3. Once the fellow you wish to verify progress is checked off, Click the Unsatisfactory button. The system will then prompt you to enter a reason for the unsatisfactory progress.

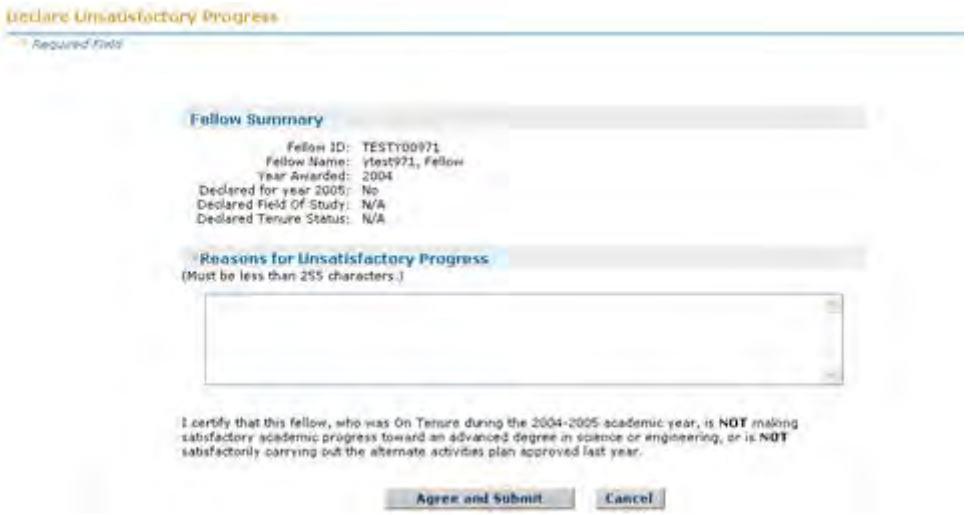


Figure 32: Declaring Unsatisfactory Progress

4. Enter the reasons for unsatisfactory progress in the Unsatisfactory Progress Field (no more than 255 characters).

5. Press the Agree and Submit Button

A screen is displayed that confirms that you have successfully submitted an unsatisfactory rating for a fellow.

Figure 33: Confirmation of Unsatisfactory Rating

6. Click the Agree and Submit button.

A confirmation screen is displayed indicating you have successfully submitted an unsatisfactory progress for the selected fellow. You may select the CO Home Page link to return to your home page and task list. Once you verified unsatisfactory progress for a fellow, an email will be sent to NSF. NSF may then contact you to provide additional information regarding the fellow and reason for the rating.

Submitting Reserve Verifications

Each year, a reserve verification must be submitted for fellows who are on reserve at your organization. A reserve verification indicates that the fellow has been on reserve during the academic year and has not used any of their tenure. Under the On Reserve "academic year" tab is the list of fellows that are on reserve that need a pending reserve status verified. The academic year will change each year and will reflect the appropriate academic year for which you should review to verify reserve status by the Fellow.

To Submit a Reserve Verification(s):

1. Select the Verify Satisfactory Progress/Reserve Status link from your task list.

2. Select the On Reserve tab to display the list of fellows pending reserve verifications.

Figure 34: On Reserve Tab

3. Select the fellow(s) you wish to submit a verification for by selecting the checkbox next to the fellow's name.

If you wish to select all fellows, you may click the Select All button at the top of the checkbox column.

Figure 35: Select All Fellows Button

4. Click the Submit Reserve Verification button.

A screen is displayed which lists the selected fellows and the reserve verification statement.

Figure 36: List of Fellows and Reserve Verification Statement

5. Click the Agree and Submit button.

A confirmation screen is displayed indicating you have successfully submitted reserve verifications for the selected fellows. You may select the CO Home Page link to return to your home page and task list. Once you have submitted a reserve verification for a fellow, the fellow will no longer appear in your pending verifications list.

Viewing the Fellowship Year Fellows Report

The Fellowship Year Fellows Report is a real time report that details the fellows who are currently affiliated with your organization for the current fellowship year as well as each fellow's eligibility for the next year of tenure. You may view the report at any time using the Fellowship Year Fellows Report link in your task list. All changes that are made to a fellow's tenure for the current year will be reflected in this report upon approval of the changes.

Figure 37: Fellowship Year Fellows Report Link

TIP: It is recommended that you regularly check your fellows report to ensure that the list of fellows associated with your organization and their statuses is accurate. Any inconsistencies should be reported to NSF for resolution.

To View the Fellowship Year Fellows Report:

1. Select the View Fellowship Year Fellows Report link from your task list.

The current Fellowship year's Fellows Report is displayed. The report includes the fellow's tenure information for the current fellowship year and indicates whether they are currently eligible for tenure for the next academic year. The report also displays whether they have declared tenure for the next academic year. You may sort the report by any of the columns by clicking the column heading.

Figure 38: Sortable Column Headings

If you would like to print the report, you can select the View PDF Print Format link. The report will be displayed in a separate window in Adobe PDF format.

Figure 39: Fellowship Year Fellows Report

NOTE: A fellow is eligible for tenure for the next academic year if they have used less than 36 months of tenure and have a satisfactory rating for the current academic year. For further details on eligibility, please refer to the NSF GRFP Officials' Guide.

Viewing Grants Roster Reports

When you log onto the GRFP system, the Grants Roster report may be accessible using the View Grants Roster under the Optional Task List. You may view current Grant Rosters and previously year's Grants Roster Reports at any time using the View Grants Roster Reports link. This task allows you to review the university's current Grant Roster Report and past years Grants Roster Reports. The Grant Roster Report is no longer required to be submitted annually. Previously submitted reports and version history is available in the Optional Task list.

The Grants Roster Report is an annual report that details the projected amount of money that your institution plans to obligate to students for the upcoming Fellowship year. Any

changes to Fellow records should be reflected in the Program Expense Report for that year. Additionally, each GRFP institution can view the Institution Financial Summary at any time via the Optional Task List.

To View a Grants Roster Report and its version history:

Figure 40: View Grants Roster Reports Link

1. Select the View Grants Roster Report link from your Optional Task List.

The list of all year's unsubmitted or submitted grants roster reports are displayed, including the current year's report, the report status, the academic year of the report, and a link to view the grants roster report for each particular academic year. The list of reports can be searched to find a report from a particular academic year.

NOTE: A Grant Roster report will not be available for fellowship years where no fellows were associated to the institution for that particular year.

NOTE: Grants Roster reports are only available dating back to the 2008- 2009 Fellowship Year. To view information on fellows prior to 2008-2009, access the View Fellow Information link.

Figure 41: View Grants Roster Reports Screen

2. Select the link next to the academic year's report for which you would like to see a version history.

The View Grants Roster Report screen displays. If a version history exists for a previously submitted report, the version history is listed at the top of the page. The version history lists general report information about each version of the report: adjust/submit date, report status, NSF review date, and a link to view that particular version of the report. The most current version of the report is automatically displayed

below. All other unsubmitted reports will display the current Grant Roster information for all fellows associated with the institution.

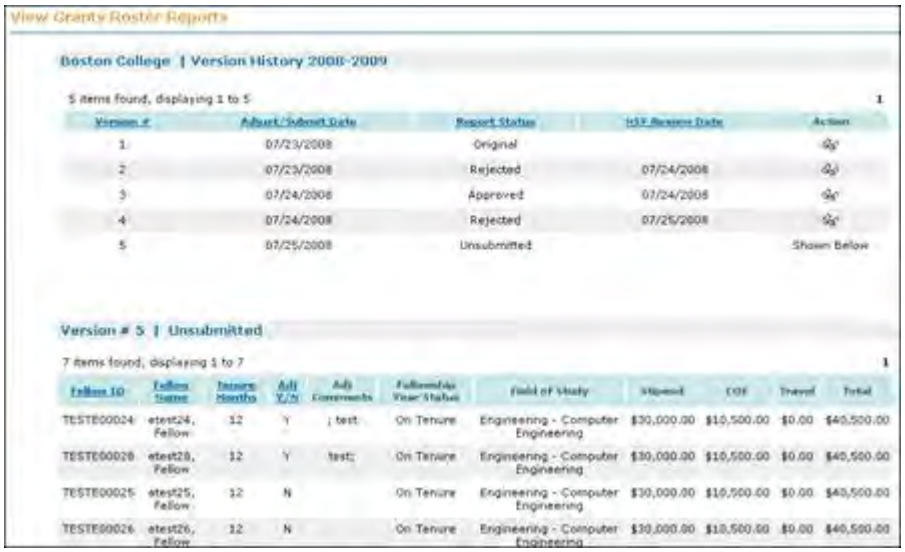


Figure 42: View Grants Roster Report Screen with Version History

3. To view the Financial Summary associated with a previously submitted Grants Roster Report, select the View Financial Summary button at the bottom of the screen

NOTE: The View Financial Summary button is only available for previously submitted reports. All Unsubmitted reports will not display a link to View Financial Summary. To view the current Institution Financial Summary, navigate to that particular task in the Optional Task list.

Managing Program Expense Reports

Each year Financial Officials are required to submit a Program Expense Report for your organization that details the costs that were paid to each fellow at your organization for the year. The Program Expense Report includes a detailed cost listing for each fellow, regardless of their Fellowship Status for the year. The NSF will issue the report each year in the fall detailing the costs for the previous academic year. Coordinating Officials and alternates are able to review the report and make any adjustments that are needed. However, the Program Expense Report must be certified and submitted by the designated Financial Official. You are also able to adjust the past five years' Program Expense Reports and resubmit them to the NSF for approval.

Program Expense Report User Roles

Coordinating Officials:
Each year, you will receive an email alerting you when the Program Expense Report is available for your review and validation. AS a Coordinating Official, you will see the link to Adjust- Program Expense Report when you log into the GRFP system. The Program Expense Report for the most recent fellowship year will be available in your task list. During the time

the Expense Report submission period is open, you may use this link to review, and adjust the current year's report for submission by the Financial Official.

*** Total Fellows: 12-Month Tenure 2012 - 2013**			
Stipend	$30,000.00	13	$390,000.00
Cost of Education Allowance	$12,000.00	13	$156,000.00
Subtotal Estimation of 12-Month Tenure Support Required: 2012 - 2013	—	13	$546,000.00
Total Fellows: Partial Support Tenure 2012 - 2013			
Stipend Partial Support	—	—	$0.00
Cost of Education Allowance Partial Support	—	—	$0.00
Subtotal Estimation of Partial Support Required: 2012 - 2013	—	0	$0.00
Total Fellows: Other Allowances			
Other Allowances	—	0	$0.00
Subtotal Estimation of Other Allowances Support Required: 2012 - 2013	—	0	$0.00
TOTAL ESTIMATE 2012 - 2013			**$546,000.00**
Unliquidated Balance from Award 0951703	—	—	($494,837.23)
Unliquidated Balance from Award 0946370	—	—	($0.00)
		Potential Recommended Funding	**$91,162.77**

* Fellows 12-Month Tenure are on Tenure for 12 months and are including full Stipend and full Cost of Education

Figure 43: Adjust Program Expense Report Link as CO

Financial Officials:

Each year, you will receive an email alerting you when the Program Expense Report is available for your review and validation. As a Financial Official, you will see the link to Adjust/Submit. Program Expense Report link when you log into the GRFP system. The Program Expense Report can only be submitted by the designated Financial Official. You may also adjust and re-submit previously submitted Program Expense Reports.

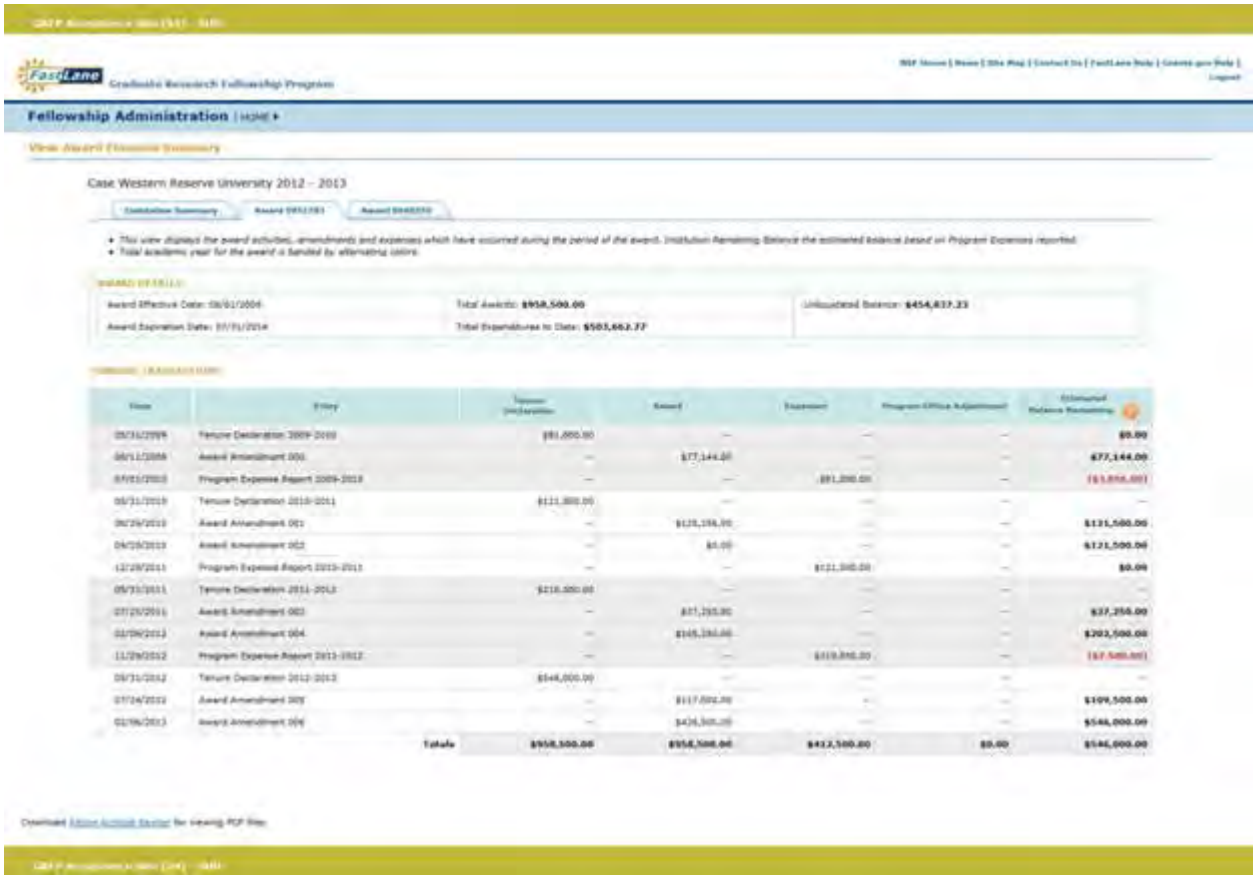


Figure 44: Adjust/Submit Program Expense Report Link as FO

You may also review, submit, adjust and re-submit previously submitted Program Expense Reports for the four fiscal years preceding the current fiscal year. These prior Expense Reports can be accessed by selecting the Adjust/Submit Previous Year Program Expense Reports link from the Optional Task List

Figure 45: Adjust/Submit Previous Year Program Expense Reports Link as FO

In addition to adjusting and submitting Program Expense Reports, you may also view Program Expense Reports at any time using the View Program Expense Reports link available in your optional task list. Each time you make changes to a Program Expense Report to submit to NSF for approval, the changes that you submit are saved as a unique report version that can be reviewed at a later date. This task allows you to review the current version of each Program Expense Report and the version history of each report for your university.

Figure 46: View Approved Program Expense Reports Link

TIP: For detailed explanation of the Program Expense Report, please refer to the GRFP Officials' Guide.

Adjusting and Submitting a Program Expense Reports

Only the designated Financial Official will have the permissions to submit the institutions Program Expense Report. All Coordinating Officials and their alternates have the ability to adjust and save changes to the Program Expense Report. If there are no changes when you review your Program Expense Report, you may choose to submit the report with no adjustments. If you wish to make adjustments to your Program Expense Reports (previously submitted or unsubmitted), you can change line item values and submit the modified report to NSF for review. The NSF will make the necessary adjustments to the fellow's tenure records. When your report has been approved by NSF, both the Coordinating Officials and Financial Officials at your university will be notified via email and the report will be available in your Approved Program Expense Reports area.

To Adjust a Program Expense Report - Coordinating Officials and Financial Officials

1. COs - Select the Adjust Program Expense Report link from your task list.
2. FOs - Select the Adjust/Submit Program Expense Report link from your task list

The Adjust/Submit Program Expense Report screen is displayed. This screen contains a list of the Program Expense Reports that have been generated for your university within the last five years and the associated academic year.

Figure 47: Adjust/Submit Program Expense Reports as FO

3. COs - Click the Adjust link for the expenditure link and the associated academic year that you wish to submit with adjustments.

4. FOs - Click the Adjust/Submit link for the expenditure link and the associated academic year that you wish to submit with adjustments

The Program Expense Report for the chosen academic year is displayed

Figure 48: Program Expense Report and Adjust Link

5. Select the Adjust link next to the fellow's record for which you wish to adjust costs.

The fellow's current stipend, COE, GROW, and other costs are displayed in editable form.

Figure 49: Adjust Fellow Costs Screen

6. Enter your adjustments to the stipend, COE, GROW, and/or other costs and your comments regarding the adjustment.

7. If you made changes to Fellowship Status or tenure months, you have the option of selecting Calculate to calculate the appropriate stipend and COE amounts for that fellow before saving the changes.

   a. Note, the system will calculate the Stipend and COE amounts based on the fellow's months on Tenure. Only valid Stipend and COE amounts will be accepted:

      i. Stipend must equal months on tenure equivalent or equal $0

      ii. COE must equal months on tenure equivalent or equal $0

8. Click the Save button.

The adjusted report is displayed. The adjusted fellow records are flagged with a Y in the Adj column. If you wish to view the original report without any adjustments reflected, you may click the View Program Expense Report Without My Adjustments button available at the bottom of the page.

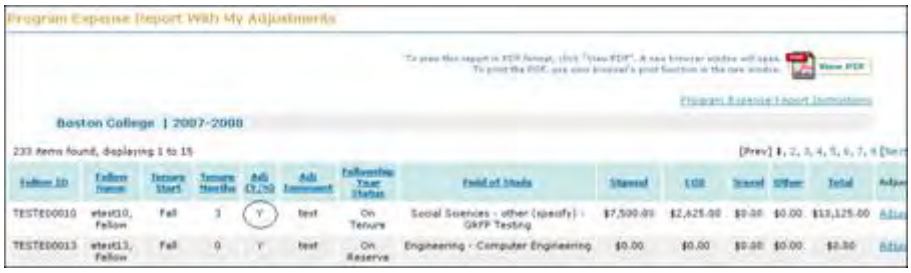


Figure 50: Adjusted Record Flag on the Program Expense Report With My Adjustments Screen

9. Enter your comments on the entire report in the General Comments box.

   a. Note: You may enter comments in the comments box to indicate if report is ready for submission or if additional adjustments or reviews are required. Comments can be overwritten or deleted.

10. You may return to the unsubmitted report to make additional adjustments

11. To Submit a Program Expense Report as a Financial Official

As a Financial Official, you may follow the instructions for adjusting a Program Expense Report and save your adjustments and comments without submitting the report by clicking the Save Report button.

Once you or the Coordinating Official have entered all your adjustments and comments and are ready to submit the report, you must sign the electronic certification to certify that the Program Expense Report records are an accurate representation of the accrued student expenses over the fellowship year.

Figure 51: Program Expense Report Electronic Certification

12. Read and check the certification to agree that the report accurately reflects the expenses generated by NSF Graduate Fellows during the associated fellowship year. Make sure that your name displays accurately after "Electronically signed by:" and that the current date is listed.

13. Click the Submit Report button.

A confirmation screen is displayed indicating you have successfully submitted your Program Expense Report. You may select the Home Page link to return to your home page and task list.

The submitted Program Expense Report is forwarded to NSF for review and approval. A report in submitted status cannot be modified further until NSF either approves or rejects the report. If NSF disapproves your report, both the Financial Officials and the Coordinating Officials at your university will be notified via email, and the report status will change in the Adjust/Submit Program Expense Reports list.

WARNING: If you have saved changes to a Program Expense Report or submitted a Program Expense Report to NSF, but NSF has not yet approved the report, it is possible that an NSF Official might modify a Fellowship Status record for a fellow for which you have submitted a modification in your Program Expense Report. If this occurs, the change made by the NSF Official will override the change for this fellow that you have made in your Program Expense Report, and the adjustment you have made will be removed from the system. If an adjustment you have made is removed in this way, you will receive a notification email. You must then log in and view your Program Expense Report to ensure that no further adjustments are needed to this fellow's record. If your Program Expense Report was in Submitted status when this change occurred, the submitted report will be saved off and the status will be set at Rejected. You may then go in to the report, make any necessary adjustments and resubmit.

Viewing Program Expense Reports

To View a Program Expense Report and its version history:

Figure 52: View Program Expense Reports Link

1. Select View Program Expense Reports link from your Optional Task List.

The list of all year's modified or submitted Program Expense Reports is displayed, including the current report status, the academic year of the report, and a link to view the version history of the Program Expense Report for that particular academic year. The list of reports can be searched to find a report from a particular academic year.

Figure 53: View Program Expense Reports Screen.

2. Select the link next to the academic year's report for which you would like to see a version history.

The View Program Expense Report screen displays. If a version history exists for the particular report, the version history is listed at the top of the page. The version history lists general report information about each version of the report: adjust/submit date, report status, NSF review date, and a link to view that particular version of the report. The details of the most current version of the report are automatically displayed below. You can toggle back and forth between the various versions of the Program Expense Report by clicking the links in the version history table to view a particular version. Report versions record adjustments made by GRFP Officials, and the report status states weather those particular line item adjustments have been approved by NSF.

The report includes a list of the fellows, their tenure information, and their stipend, COE, GROW, and other costs for the year. You may sort the report by any of the columns by selecting the column heading. There is also a summary section at the bottom of the screen that details the total number of fellows for the year and the total costs.

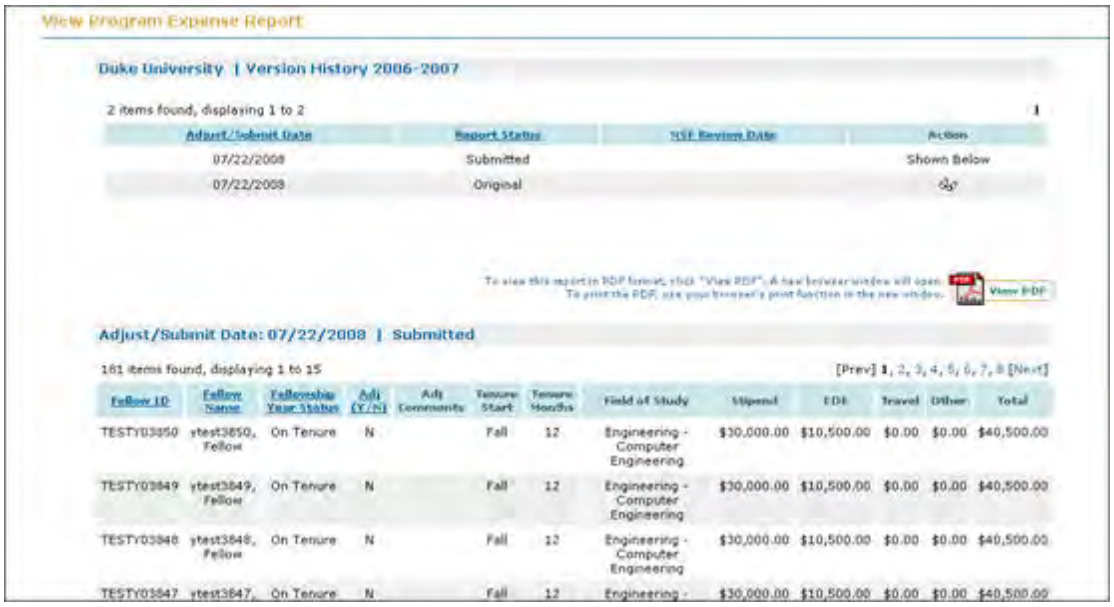


Figure 54: View Program Expense Report Screen.

3. If you wish to print the report, select the View PDF Print Format link located at the bottom of the screen.

The Program Expense Report is displayed in a printable, Adobe PDF format in a separate window. You may then print the report using the PDF toolbar.

Managing Fellow Completion Reports

When the Fellow Completion Report task is open, Coordinating Officials may work on and submit a Fellow Completion Report for the organization that details the graduation status for each fellow for the current year and past years. The Fellow Completion Report includes a listing for each fellow who is associated to your institution. The NSF will issue the report detailing the list of fellows for the previous academic year that were associated to your institution in addition to the list of fellows from previous fellowship years (Beginning 2010 – 2011) that have not yet been marked with a final status. Financial Officials and alternates are able to review the report and make any adjustments that are needed. However, the Fellow Completion Report can only be certified and submitted by the designated Coordinating Official.

Fellow Completion Report User Roles

Coordinating Officials:
Each year, the system will generate a Fellow Completion Report and this report will be available for your review, validation and submission. As a Coordinating Official, you will see the link to Adjust/Submit the Fellow Completion Report in your Required Task List when you log into the GRFP system. The Fellow Completion Report can only be submitted by a designated Coordinating Official for your institution.

Figure 55: Adjust/Submit Fellow Completion Report Link as CO

Financial Officials:
Each year, the system will generate a Fellow Completion Report and this report will be available for your review and validation in the Required Task list. As a Financial Official, you will see the link to Adjust the Fellow Completion Report when you log into the GRFP system. During the time the Fellow Completion Report submission period is open, you may use this link to review, update, and save each fellow's graduation status and details.

Figure 56: Adjust Fellow Completion Report as FO

Adjusting and Submitting a Fellow Completion Report

Only the designated Coordinating Official will have the permissions to submit the institutions Fellow Completion Report. All Financial Officials and their alternates have the ability to adjust and save changes to the Fellow Completion Report. The Fellow Completion Report has four required fields for each fellow associated to the institution. All required fields must be completed for submission.

To Adjust Fellow Completion Report – Coordinating Officials and Financial Officials

1. COs - Select the Adjust/Submit Fellow Completion Report link from your Required Task List

2. FOs - Select the Adjust Fellow Completion Report link from your Required Task List

The Fellow Completion Report screen is displayed. This screen contains a list of all Fellows that are associated to your institution for the last fellowship year and any fellows that remain in "In Progress" status from previous fellowship years (beginning with Fellowship Year 2010 – 2011).

Review and provide updates for each fellow's Graduate Program status. This report can be edited and saved by any GRFP official. The report must be certified and submitted by the institution's designated Coordinating Official annually.
Changes to the fellow completion report will not update the fellow record or the fellow activities report.

3. The report has four required fields for each fellow record that you are required to edit or update.

a. Degree Status: Select the current degree status of the fellow. All fellows that are "In Progress" status will remain on the report until next year. Fellows that have transferred, Withdrawn or Graduated will be removed from next year's report.

b. Graduate Program Start Date: Enter the date that the fellow began his/her Graduate Program in MM/YYYY format.

c. Degree Sought: This value is pre-populated from the Degree Sought field of the fellow's annual Activity Report. If the fellow has not completed the annual Activity Report or has entered free form text for the Degree Sought field, you will need to make the appropriate selection from the dropdown menu.

d. Graduation Date: Enter the graduation date that the fellow will graduate in MM/YYYY format. This field is only required if the fellow's degree status is marked as "Graduated".

i. Note: Fellows in Transferred, Graduated, or Withdrawn status will not appear on next year's Fellow Completion Report. Any changes made to report which are not submitted to NSF will not be reflected in next year's report

Figure 57: Fellow Completion Reports Screen

NOTE: You may export the report to an excel document.

4. Click the Save button. As you make edits to the report, remember to save frequently. The report will timeout after 30 minutes of inactivity and changes that are not saved will be lost.

5. The Last Updated Date and Last Updated User will be displayed at the top of the report.

6. Enter your comments on the entire report in the General Comments box and select Save.

a. You may enter comments in the General Comments box to indicate to the next user if the report is ready for submission or if additional adjustments or reviews are required. Comments can be overwritten or deleted.

7. You may return to the report at any time to make additional adjustments.

8. To Submit a Fellow Completion Report, you must be a registered GRFP Coordinating Official for your institution.

Once a Financial Official or a Coordinating Official has updated all required fields in the Fellow Completion Report and provided comments, the report is be ready for submission. A designated Coordinating Official must read and sign the electronic certification to certify that the report records accurate to the best of his/her knowledge.

Figure 58: Submit Fellow Completion Report

9. A confirmation screen is displayed indicating you have successfully submitted your Fellow Completion Report. You may select the Home Page link to return to your home page and task list.

10. If edits are made to a Fellow Completion Report in "Submitted" status, the report status returns to "unsubmitted" once the new edits are saved.

A report in submitted status can be modified at any time during the submission window. You may edit, submit and re-submit the Fellow Completion Report until the deadline has passed.

NOTE: As a Coordinating Official, you must make edits and select Save to a submitted report in order to see the button to submit the report again.

Viewing Award Financial Summary

The Award Financial Summary module provides a summary of all fellows associated with the organization for the current fellowship year. In addition, the institution's Active and Expired awards are displayed. From this view you will be able to view real-time Financial Summary information

NOTE: Awards with an effective date of 2003 or later will display in the Financial Summary module. Awards with the effective date prior to 2003 will not be displayed.

To View the Award Financial Summary:

1. Select the View Award Financial Summary link from your task list.

Figure 59: View Award Financial Summary Link

The Award Financial Summary screen displays with the Institution Summary tab for the current fellowship year:

NOTE: The GRFP Fellowship Year begins on June 1 through May 31st. The Institution Summary funding details are reflective of the current fellowship year.

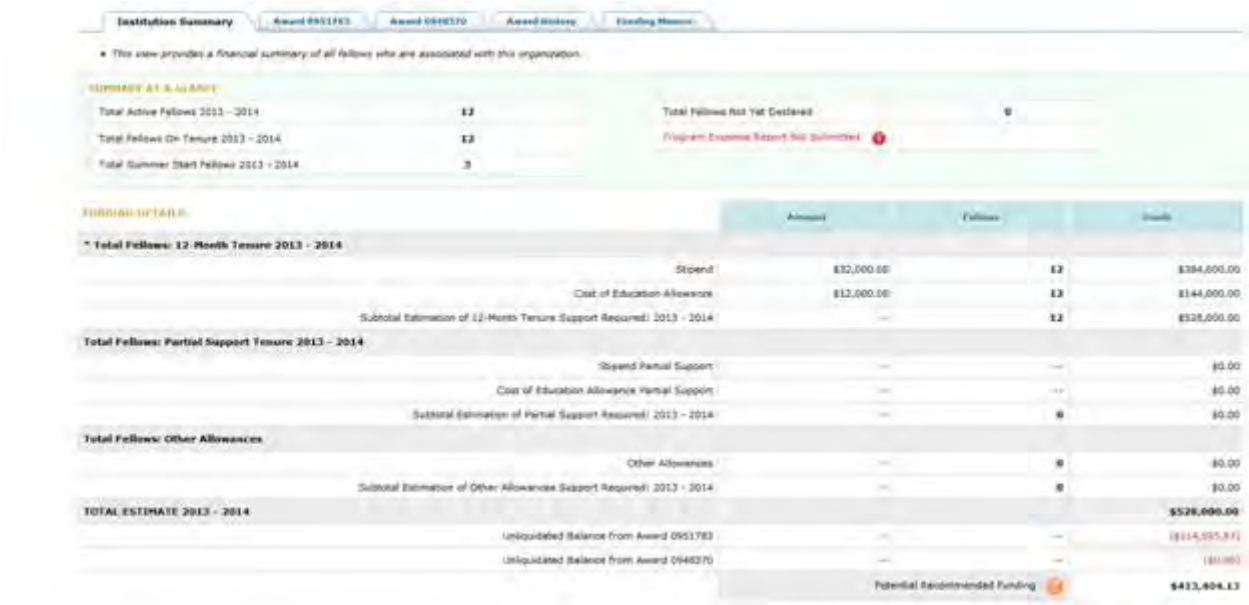


Figure 60: View Award Financial Summary Screen - Institution Summary Tab

On this screen, you are able to view the financial details of the current fellowship year with the total estimate of funding needs based on the current fellows Tenure Declaration.
At the top of the Institution Summary tab, the Summary at a Glance table provides more information on the institution:

Figure 61: Summary at a Glance

NOTE: For accurate financial reporting and award recommendations, all GRFP Institutions must submit their Program Expense Report to NSF each year prior to the October deadline. If there has been a report submission, the previous year's Program Expense Report will display as a hyperlink to the report once it is approved by NSF. New GRFP Institutions will not have an Program Expense Report available until the first submission at the end of the first Fellowship Year.

Below is a listing of the Summary at a Glance fields and their descriptions:

Feature	Description
Total Active Fellows (Summary at a Glance)	This number represents the total number of fellows, regardless of status, associated to the institution

Total Fellows On Tenure	This number represents the total number of fellows who have declared tenure.
Total Summer Start Fellows	This represents the total number of fellows who have declared as a Summer start fellow.
Total Fellows Not Yet Declared	This value represents the number of fellows that have not declared their Fellowship Status for the current fellowship year. Funds are not allocated for Fellows who have not declared their Fellowship Status. If the total number of fellows not declared is > 0, the system will display a warning icon with more information.
Program Expense Report field	This section will display a specific message based on the status of the last fellowship year program expense report. The following status may be displayed based on the current status of the previous years report: • Program Expense Report Not Submitted • Program Expense Report Submitted, not yet approved • Program Expense Report PO Rejected • Program Expense Report Not Required (New Inst. or Inst. w/o fellows from previous year) • Program Expense Report

Below is a sample screen of the Funding Details section on the Institution summary and a table with their appropriate descriptions:

FUNDING DETAILS	Amount	Fellows	Funds
* Total Fellows: 12-Month Tenure 2013 - 2014			
Stipend	$32,000.00	0	$0.00
Cost of Education Allowance	$12,000.00	0	$0.00
Subtotal Estimation of 12-Month Tenure Support Required: 2013 - 2014	—	0	$0.00
Total Fellows: Partial Support Tenure 2013 - 2014			
Stipend Partial Support	—	—	$37,333.00
Cost of Education Allowance Partial Support	—	—	$24,000.00
Subtotal Estimation of Partial Support Required: 2013 - 2014	—	2	$61,333.00
Total Fellows: Other Allowances			
Other Allowances	—	0	$0.00
Subtotal Estimation of Other Allowances Support Required: 2013 - 2014	—	0	$0.00
TOTAL ESTIMATE 2013 - 2014			$61,333.00
Unliquidated Balance from Award 1250923	—	—	($25,742.50)
Unliquidated Balance from Award 0757737	—	—	($0.00)
		Potential Recommended Funding	$35,591.00

Figure 62: Funding Details

Feature	Description

Total Fellows: 12-MonthTenure	This section details the total number of fellows and total funds for all fellows who require full tenure support. Please note, fellows in this category must be on Tenure for 12 months, and collecting full Stipend and full Cost of Education
Stipend:	This row details the total number of fellows and funds that are collecting full Stipend for the current fellowship year.
Cost of Education Allowance	This row details the total number of fellows and funds that are collecting full cost of education for the current fellowship year.
Subtotal Estimation of 12-Month Tenure Support Required	This row details the total number of fellows and subtotal of funds for all fellows who require full tenure support.
Total Fellows: Partial Support Tenure	This section details the total number of fellows and total funds for all fellows who require partial tenure support. Please note, fellows in this category can either be on Tenure for less than12 months, or collecting partial Stipend or partial Cost of Education.
Stipend Partial Support:	This row details the total number of fellows and funds for those that receive partial stipend support.
Cost of Education Allowance Partial support:	This row details the total number of fellows and funds for those that receive partial cost of education allowance.
Subtotal Estimation of Partial Support Required:	This row details the total number of fellows and subtotal of funds for all fellows who require partial support
Total Fellows - Other Allowances	Total fellows and funds for fellows that require funds in support of other allowances
Other Allowances	This amount refers to fellows that may require additional funds for GRFP approved allowances.
Subtotal Estimation of Other Allowances Support Required	This row details the total number of fellows and subtotal of funds that require Other Allowance support.
Total Estimate	This amount represents the total estimated funds required to support GRFP Fellows for the current fellowship year based on the calculation of all subtotal amounts.
Balance From Previous Years	This amount represents the Institution Balance Remaining from the Primary Award tab.
Potential Recommended Funding	This value is calculated to derive the projected institution funding to be recommended based on the current year's Tenure Declaration amount and the previous year's Institution Balance Remaining.

NOTE: Fellows who receive full stipend and full COE but are on tenure for less than 12 months are categorized as Partial Support Fellows and will be accounted for in the Partial Support section of the Institution Summary.

The Financial Summary screen displays an institution's Active Awardsas tabs across the top of the screen. Each tab displays the award activities, amendment and expenses which have occurred during the period of the award. The system will calculate the Institution's Balance remaining using the funds carried over from previous awards and the award activities.

1. To view detailed information for a particular award, select the award tab you wish to view:

Figure 63: Award Tab

At the top of each award tab, the Award Details table provides more information on the Award:

Figure 64: Award Details

Feature	Description
Award Start Date:	The effective date of the Award
Award End Date:	The expiration date of the Award
Total Awards:	Cumulative amount issued by NSF to date to the organization under the current award
Total Expenditures:	Cumulative amount of expenses reported to NSF to date during the award effective dates.
Carryover from Previous Award	This is the carryover amount from the previous award's Institutions Balance Remaining.

Institution Remaining Balance:	This is the current balance of funds the institution has on hand based on the total awards made minus total expenditures and adjustments based on the carryover amounts from previous awards.
Award Level FFR submitted as recorded in NSF FAS as of DD/MM/YYYY:	Financial expenditures as recorded against the Current Award and submitted via the FastLane/Financial Functions.

Below the Award Details section, a list of the detailed funding transactions is provided in a table on the Award tab screen. The funding transactions included award activities, amendments and expenses which have occurred during the period of the Award. The Institution's Balance Remaining is calculated with the funds carried over from previous awards and the award transactions.

Date	Entry	Tenure Declaration	Award	Expenses	Program Office Adjustment	Estimated Balance Remaining
05/31/2012	Tenure Declaration 2012-2013	$243,000.00	--	--	--	$0.00
09/22/2012	Award Amendment 000	--	$35,742.00	--	--	$35,742.00
09/22/2013	Tenure Declaration 2013-2014	$61,333.00	--	--	--	--
	Totals	$304,333.00	$35,742.00	$0.00	$0.00	$35,742.00

Figure 65: Funding Transactions

Feature	Description
Annual Institution Report	Fellowship expenses as reported by the Organization through the GRFP System's Program Expense Report.Annual institution expenses are used to calculate the Institution's Remaining Balance. If there are Program Expense Reports that have not been submitted in the award period, the Institution Remaining Balance will be inaccurate. Reports should be submitted for the missing years to ensure an accurate budget accounting.
Tenure Declaration	Projected expenses for the upcoming fellowship year as reported on your Organization's Grants Roster Report
Award Amendments	Each Award Amendment posted against the base award is displayed as a separate line item in the corresponding award tab.
Program Office Adjustments	Program Office Adjustments are amounts determined by the GRF Program Office in conjunction with the Institution.

Institution Balance Remaining	The Institution Balance Remaining reflects the current balance of funds the institution has on hand based the total awards made minus total expenditures and adjustments based on the carryover amounts from previous awards.

The Award History tab displays a historical view of an institution's Awards, including Active and Expired awards. The Total Obligations, Expenditures and Remaining Balance are shown for each award.

Figure 66: Award History Screen

Viewing Funding Recommendation Memos

The Funding Memo tab provides a link to View/Delete a recommendation memo for any associated funding memos for each specified institution.

1. View/Edit Award Financial Summary link
2. Search for an Organization using the Search button
3. Click the View/Edit link
4. Click the **Funding Memos** tab on the View Award Financial Summary page
5. Click the View link for the specified institution and Award ID
6. Open or Save the Funding Memo PDF

Figure 67: Search and View Institution Financial Summary

Figure 70: View a Funding Memo

Viewing Fellow Information

You may view tenure and travel information about the fellows who are associated with your organization using the View Fellow Information link available in your task list. You may view a fellow's tenure records for each year, tenure change requests, and additional funding opportunities requests.

Figure 66: View Fellow Information Link

To View Fellow Information:

1. Select the View Fellow Information link from your task list.

A list of all fellows at your organization is displayed, including the fellow's name, fellow id, field of study, fellow status, Fellowship Status, and the year they were awarded. You may sort this list by selecting the column heading of any of the columns to sort the list by that column. A search box is also available in this screen if you wish to search for a specific fellow.

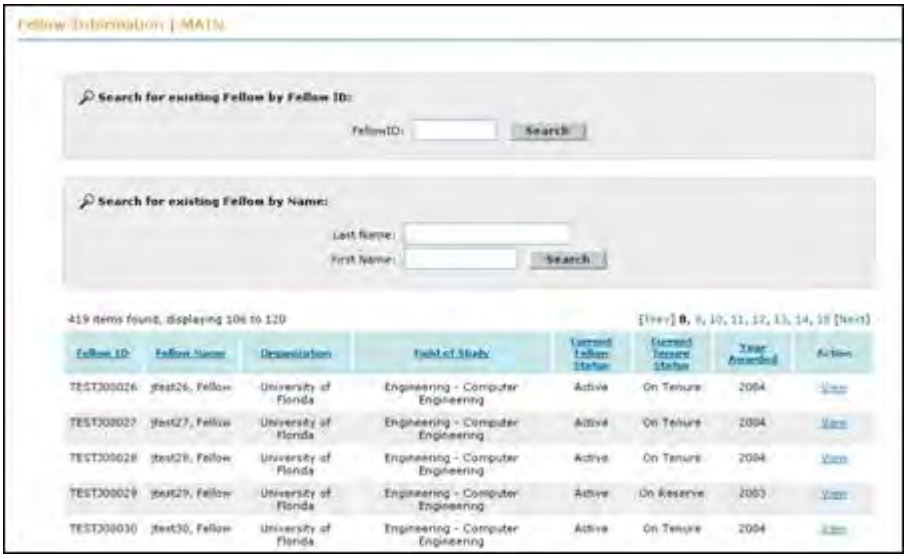


Figure 67: List of Fellows

To Search for a Specific Fellow:

1. Enter a fellow id, fellow last name, and/or fellow first name.
2. Click the Search button.

The matching results are displayed.

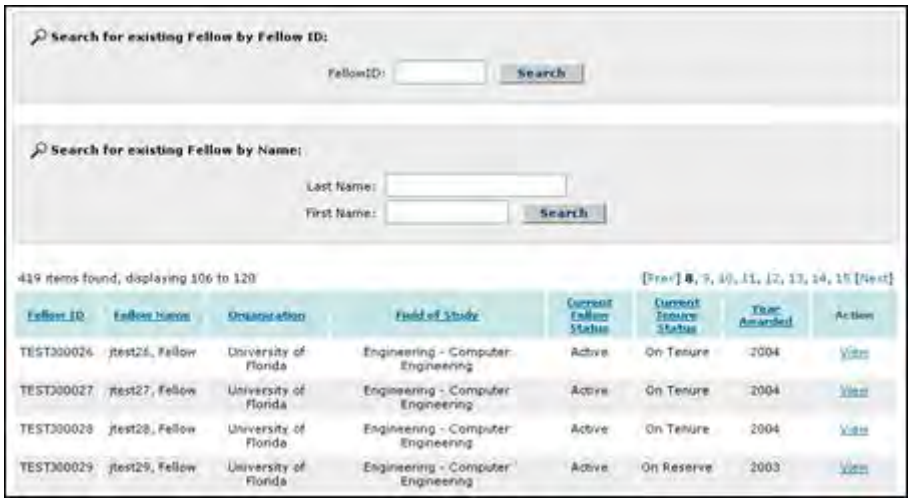


Figure 68: Search Box and Matching Results List

3. Select a fellow to view by selecting the View link next to the fellow's record.

The fellow's record is displayed. There are four tabs of information available for you to view: Profile, Fellowship Status Details, Tenure Changes, Additional Funding Opportunities, and Travel Requests. The fellow's profile is the tab that will be displayed when you first select to view the fellow's record.

Figure 69: Fellow Profile Screen

4. Select the Fellowship Status Details tab to view the fellow's tenure records.

The fellow's tenure records are displayed. You may sort the list by selecting the column header for the column by which you wish to sort.

Figure 70: Fellow Tenure Records Screen and View Link

5. Select the View link next to the Fellowship Status record for which you wish to view details.

The tenure details for the tenure you record you selected are displayed. There are sections for the school information, tenure information, cost information, and update information.

Figure 71: Tenure Record Details Screen

NOTE: The fellow's tenure details will reflect the last approved status, whether the request is to occur immediately or occur in the future. If it is a tenure change request that has been approved to occur immediately, it will be reflected as such in the Current Fellow Status. If it is a tenure change request that has been approved to happen in the future (ex. The fellow is currently on tenure as of November but as of January they will be on reserve), the tenure details will reflect that they are on reserve (the last approved status), while the Current Fellow Status will reflect that they are on tenure (current status).

6. Select the Tenure Changes tab to view previous tenure change requests the fellow has submitted.

The list of tenure changes the fellow has previously requested or which are currently pending is displayed. The list includes the fellowship year the change was for, the request date, the fellow's organization, and the request status. You may sort the list by selecting the column heading of the column by which you wish to sort.

Figure 72: List of Fellowship Status Change Requests Screen

7. Select the View link next to the tenure change for which you wish to view details.

The request details are displayed, including a request summary, change information, the reason for the request, cost information, and update information.

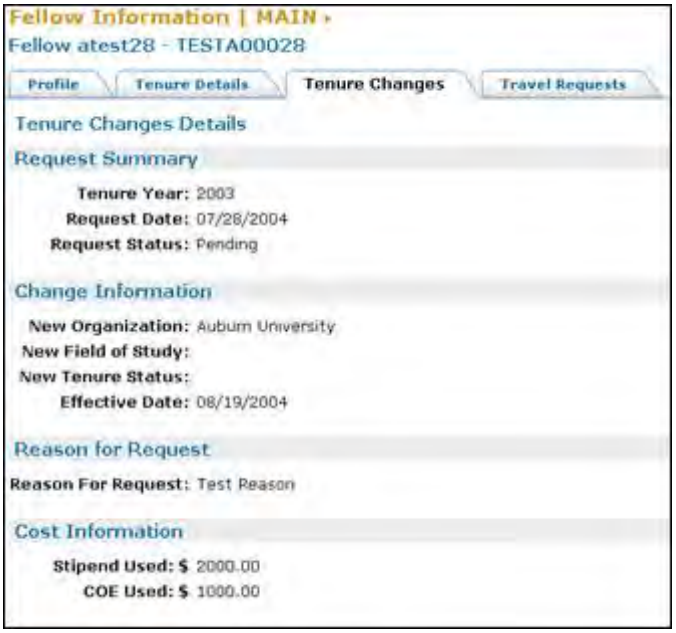


Figure 73: Fellowship Status Change Request Details Screen

8. Select the Travel Requests tab to view previous travel allowance requests the fellow has submitted.

The list of travel requests the fellow has previously submitted or which are pending is displayed. The list includes the fellowship year the request was submitted for, the request date, the fellow's organization, and the request status. You may sort the list by selecting the column heading of the column by which you wish to sort.

Figure 74: List of Travel Requests Screen

9. Select the View link next to the travel request for which you wish to view details.

The historical travel request details are displayed, including a request summary, change information, the departure information, the return information, the reason for the request, and update information.

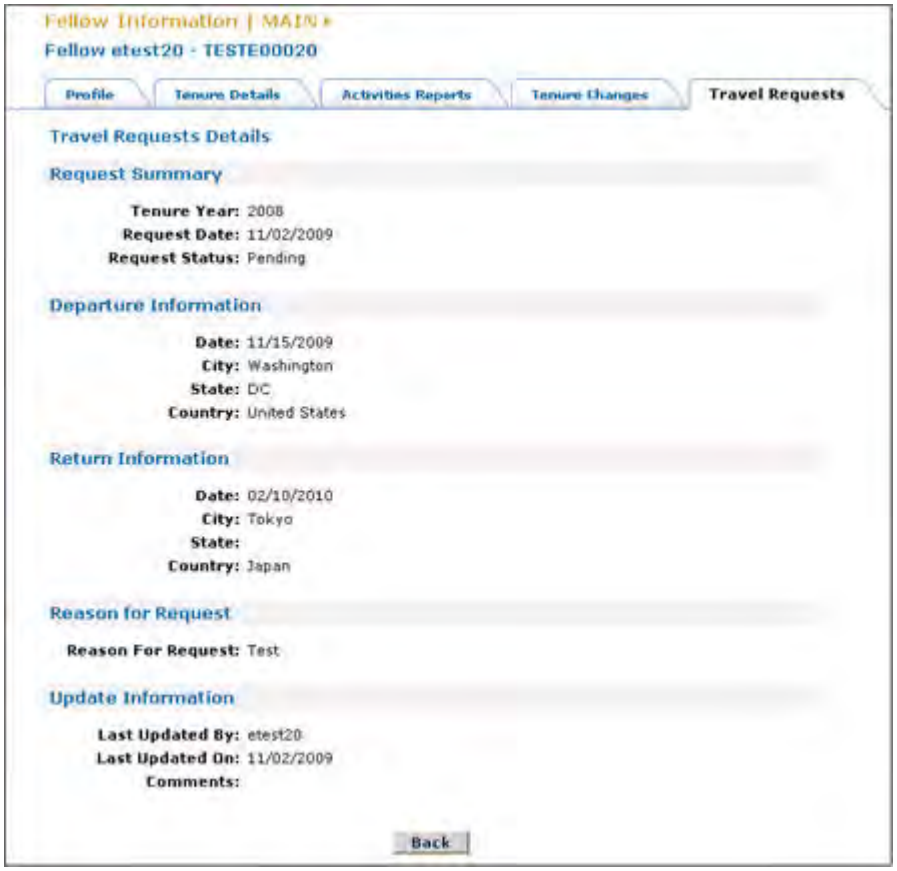


Figure 75: Travel Request Details Screen

9. Select the Additional Funding Opportunities tab to view previous Additional Funding Opportunities requests the fellow has submitted.

Fellow User Guide

Fellow User Guide

Conventions used in this guide

The names of on-screen features appear in bold.

EXAMPLE: Click on the Search tab.

Uniform Resource Locators (URLs) underlined and are in blue font.

EXAMPLE: Type the following address in your browser's address bar: http://fastlane.nsf.gov.

Many software features and some business processes are explained in a reference table format. An on-screen term appears in the left column and a description of the term appears in the right column.

EXAMPLE:

Feature	Description

Fellow ID	The Fellow ID is the number assigned to you when you become a fellow.

The following three conventions serve as both examples and descriptions:

WARNING: Warnings provide information designed to prevent critical errors from occurring. If you see a warning, stop and read it before continuing.

NOTE: While Notes do not describe critical information, we suggest that you stop and read them, too. The information in a note can prevent minor errors from occurring. Other notes simply provide information designed to deepen your understanding of a software feature.

TIP: Tips provide information designed to increase your productivity.

Getting Access

Getting Access

Logging In

1. Access the GRFP application by typing the following address into your browser address bar: http://FastLane.nsf.gov/grfp. Click on the **Graduate Research Fellowship** link of the left hand side of the page.

Figure 1: Fellow Log In

2. Type your FastLane user name in the **User Name** field.
3. Type your FastLane password in the **Password** field.
4. Click the **Login** button.
5. The GRFP home page appears with your **Fellows Task List** and current **Fellow Data**.

Resetting a Password

If you have forgotten your password you have two options for resetting your password:

1. The system can e-mail a temporary password to the e-mail address provided at account creation.
2. If your e-mail address has changed since account creation, you can reset your password by confirming the answers to two secret questions.

To have the system e-mail you a temporary password:

1. Click on the **Forgot Password?** link found under the Login button.

The retrieve password screen is displayed.

Figure 2: Forgot Password Screen

2. Type your User Name in the **User Name** field.
3. Type your registered e-mail address in the **Email Address** field.
4. Click on the **Email Password** button.

A confirmation screen will be displayed and the system will e-mail you a temporary password to the e-mail address you provided.

To reset your password using the secret questions and answers feature:

1. Type your User Name in the **User Name** field
2. Type your registered e-mail address in the **Email Address** field.
3. Click on the **Reset Password** button

The Secret Questions screen appears.

Figure 3: Secret Questions Screen

4. Enter the answers corresponding to the questions you selected for Resetting your Password

5. Click the **Submit** button.

The Reset Password screen appears

Figure 4: Reset Password Screen

6. Enter your new password and confirm the password.

7. Click the **Submit** button.

If the question and answer combinations provided match what is on file, your password will be reset to the new password entered.

Changing Your Password

1. Click the **Change Password** link from the upper-right navigation bar.

Figure 5: Change Password Link

The Rules of Behavior screen is displayed.

2. The Rules of Behavior page will be displayed. This page is used to ensure that you understand the rules of behavior involved with interacting with a government computer system. You are required to read and accept the rules of behavior before continuing through the Password Update Process. Click the "**I have read and accept the Rules of Behavior**", and click the Accept button (pictured below).

Figure 6: Rules of Behavior Screen

The Change Password screen is displayed.

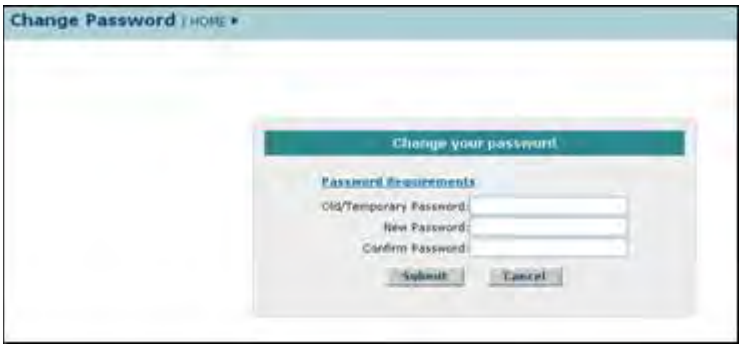


Figure 7: Change Password Screen

3. Enter your old password, your new password, and confirm your new password.
4. Click the **Submit** button.

A confirmation screen is displayed indicating you have successfully changed your password. You may select the Fellows Home Page link to return to your fellowship task list.

NOTE: Password length must be between 6 and 20 characters. The password must contain at least one alphabetic and one numeric character. Passwords are case sensitive. You cannot reuse the last three passwords you have used. Passwords expire every 365 days. Passwords for users with Financial Functions permissions expire.

Retrieving Your User Name

If you have forgotten your user name you have two options for retrieving your user name:

1. The system can e-mail your user name to the e-mail address provided at account creation.

2. If your e-mail address has changed since account creation, you can retrieve your user name by confirming the answer to one secret question.

To have the system e-mail you your user name:

3. Click on the **Forgot Username?** link found under the Login button.

The retrieve username screen is displayed.

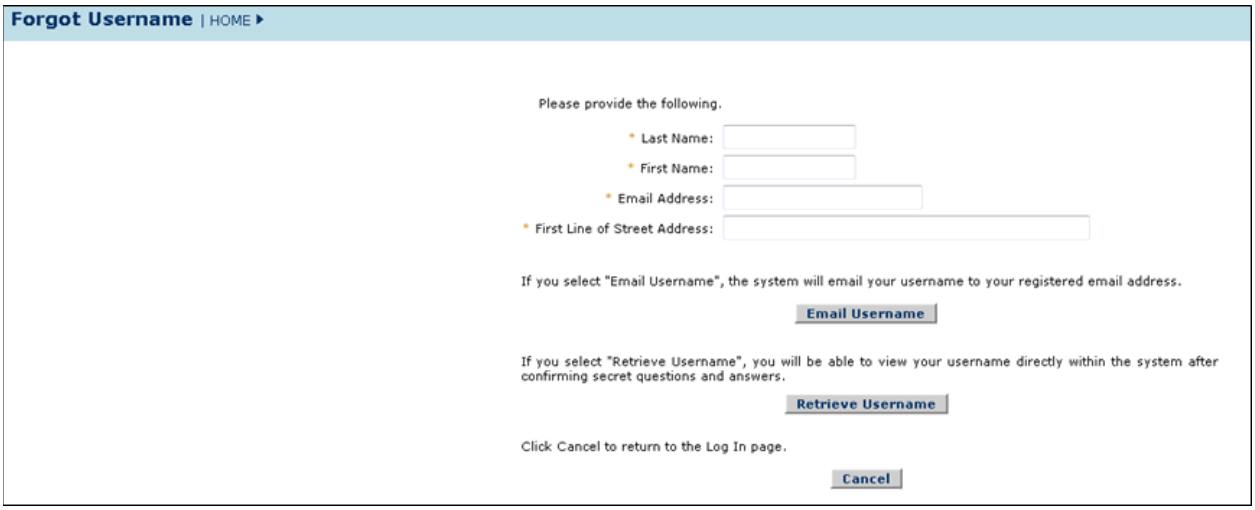


Figure 8: Forgot User Name Screen

4. Type your Last Name in the **Last Name** field.

5. Type your First Name in the **First Name** field.

6. Type your registered e-mail address in the **Email Address** field.

7. Type the First Line of your Registered Street Address in the **First Line of Street Address** field.

8. Click on the **Email Username** button.

A confirmation screen will be displayed and the system will e-mail you your User Name.

To retrieve your user name using the secret questions and answers feature:

9. Enter the information in steps 4-7 above.

10. Click on the **Retrieve Username** button

The Secret Questions screen appears.

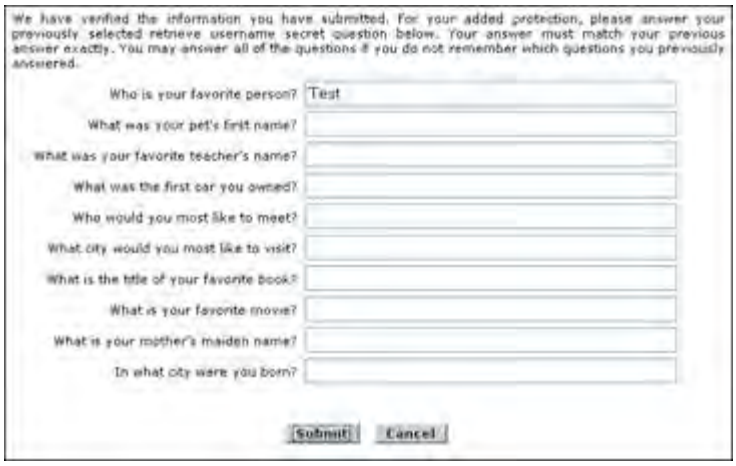


Figure 9: Secret Questions Screen

11. Enter the answer corresponding to the question you selected for Retrieving your User Name.

12. Click the **Submit** button.

If the question and answer combination match what is on file, your User Name appears

Figure 10: Retrieve User Name Screen

Mandatory Password Change

A Mandatory Password Change is required under any of the following conditions:

a. You have not voluntarily or optionally changed his/her password prior to its expiration date every 180 days.

b. Your password has expired (every 180 days) or will expire within in 10 days.

c. You forgot your password and FastLane reset it.

d. You have already Self-Registered in GRFP.

Logging Out

Once you have logged into the GRFP application, a **Logout** link is available in the upper-right navigation bar.

Figure 11: Logout Link

To exit the application at any time, click the Logout link. The web browser returns to the GRFP login page.

Understanding Your Fellows Task List

Your fellowship task list describes the current outstanding actions you must complete to manage your fellowship. The Fellows Task List contains required actions that must be completed to continue forward with your fellowship. The Fellows Optional Task List contains optional tasks that can be accessed at any time during your fellowship. Fellows who are on tenure abroad must complete additional tasks available in the Fellows Abroad Task List.

Note: Certain Fellow tasks are only available during certain periods of the year. For these tasks you will see an inactive link followed by the dates this task will be available to users.

Figure 12: Your Fellows Task List

Once a required action has been completed, the task will be removed from your Fellows Task List. The list below describes the various tasks you may see in your required or optional task list throughout your fellowship.

Feature	Description
Accept/Decline Award	The Accept/Decline Award task is a required task that needs to be completed upon the initial award of your fellowship. It is available once the awards have been issued through the award acceptance deadline.
Declare Fellowship Status Plans	The Declare Fellowship Status Plans task is a required task that must be completed each year of your fellowship. This task allows you to indicate your tenure plans for the following year and request changes to your organization or field of study for the next year.
Submit Activities Report	The Submit Activities Report task is a required task that must be completed for every year that you are on active tenure. This task allows you to submit a summary of your activities for the year and provide feedback on the GRFP program.

View/Amend Submitted Activities Reports	The View/Amend Submitted Activities Reports task is an optional task that allows you to view or append additional information to any of your Activities Reports that are in a submitted state. This link is not displayed if your Fellowship Status is awardee or declined.
View Submitted Fellowship Status Change Requests	The View Submitted Fellowship Status Change Requests task is an optional task that allows you to view all of the submitted tenure change requests throughout your fellowship tenure period. The task is always available.
View/Print Fellowship Award Offer Letter	The View/Print Fellowship Award Offer Letter task is an optional task that allows you to view/print your fellowship award offer letter. The task is available once you have been awarded a Fellowship Offer Award. (Note: this task is available to those awardees that have been awarded from 2005 and later.)
Update My Profile	The Update My Profile link allows you to update your personal profile information including, name, Open Researcher and Contributor ID (ORCID), mailing contact information, and permanent contact information. If you are Abroad, you must make changes to personal profile information by submitting a Starting Certificate.
Reset Secret Questions	The Reset Secret Questions screen allows you to select from a series of Questions and provide answers to allow for resetting your Password or retrieving your Username at a later date should the need arise.
View Fellowship Status Details/Request Tenure Change	The View Fellowship Status Details/Request Tenure Change link allows you to both view your tenure records for the current and previous years, and to request a change to your tenure. (See Section 2.5 for more information).
Prepare Fellows Abroad Information	The Prepare Fellows Abroad Information task is available in your Fellows Abroad Task List when you are on tenure at an abroad institution. The task allows you to submit, view and edit your Fellows Abroad Starting Certificate, Payment Enrollment Form, and Termination Certificate while your abroad. This task is available once your tenure change request to go abroad has been authorized. Once a Termination Certificate is submitted, this task list item will no longer appear in the Fellows Abroad Task List.

Check Status of Fellows Abroad Information	The Check Status of Fellows Abroad Information task is available in your Fellows Abroad Task List when you are on tenure at an abroad institution. The task allows you to view the Submission Status/Description of your Fellows Abroad Starting Certificate, Payment Enrollment Form, Termination Certificate and Enrollment Verification. This task is available once your tenure change request to go abroad has been authorized. Once a Termination Certificate is submitted, this task list item will no longer appear in the Fellows Abroad Task List.
View Fellows Abroad Information	The View Fellows Abroad Information task is available in your Fellows Abroad Task List when you are on tenure at an abroad institution. The task allows you to view the associated tenure years Fellows Abroad information. This task is available once your tenure change request to go abroad has been authorized. This task remains available even after a fellow completes abroad tenure.
View/Submit Fellows Abroad Travel Certificate	The View/Submit Fellows Abroad Travel Certificate task is available in your Fellows Abroad Task List when you are on tenure at an abroad institution. The task allows you to submit your travel certificate to get your one time travel stipend. This task is available once your tenure change request to go abroad has been authorized. This task remains available even after a fellow completes abroad tenure.

Understanding Your Fellow Data

Your fellow data area details your current user profile information and your current tenure details. The list below describes each feature in your fellow data area.

Feature	Description
User Profile (Name, ORCID, Address, Phone, and E-mail)	The User Profile area contains your current name, Open Researcher and Contributor ID (ORCID), mailing address, phone number, and e-mail address. This mailing contact information is used for all correspondence that is sent to you through the GRFP application and by the NSF GRFP office. It is very important that you keep this information up-to-date.
Year Awarded	The Year Awarded field indicates the year your Fellowship was awarded. For example, if you were issued a fellowship award beginning in the 2003-2004 academic year, your Year Awarded would be 2003.

Tenure Months Used	The Tenure Months Used field indicates the number of months of tenure you have used through the current academic year. Tenure months must be used in increments of 12 months except in special deferral circumstances. At the start of each year you are on tenure, your Tenure Months Used will increase by 12 months.
Reserve Months Used	The Reserve Months Used field indicates the number of months of reserve you have used through the current academic year. Reserve months must be used in increments of 12 months except in special deferral circumstances. At the start of each year you are on reserve, your Reserve Months Used will increase by 12 months.
Forfeit Months Used	The Forfeit Months Used field indicates the number of months of forfeit you have used through the current academic year.
Travel Allowance Used	The Travel Allowance Used field indicates the amount of your travel allowance you have used in the past. If you have not used Travel prior to 2010 – 2011 this field will be $0. Travel requests are not permitted after the 2010 – 2011 fellowship year.
CO and CO Email	The CO and CO Email fields indicate your current Coordinating Official and their email address. Your CO is based on the organization you are currently affiliated with.
Fellow Status	The Fellow Status field indicates your current fellow status. The values for this field include: - Active: Indicates you have an active fellowship - Awardee: Indicates you have been issued a fellowship award but have not yet accepted the fellowship offer - Deferred: Indicates you are currently on medical or military deferral - Retired: Indicates you have completed your fellowship - Terminated: Indicates you have chosen to terminate your fellowship
Fellowship Status	The Fellowship Status field indicates your Fellowship Status for the current academic year. The values for this field include: - **Awarded**: Indicates you have been awarded a fellowship that you have not yet accepted - **Completed**: Indicates you have completed your fellowship

	- **Declined**: Indicates you were offered a fellowship award which you chose to decline - **Forfeited**: Indicates you have forfeited tenure for the current academic year. This status is only valid once if you have used more than 24 months of reserve - **On Medical Deferral**: Indicates you are on medical deferral for the current academic year - **On Military Deferral**: Indicates you are on military deferral for the current academic year - **On Reserve**: Indicates you are on reserve for the current academic year - **On Tenure**: Indicates you are on tenure for the current academic year - **Pending CO Approval**: Indicates you have a change request that has not yet been approved by your CO - **Pending NSF Approval**: Indicates you have a change request that has not yet been approved by NSF - **Terminated**: Indicates you have chosen to terminate your fellowship - **Award Accepted**: Indicates you have accepted your award, but have not yet declared tenure.
Organization	The organization field indicates the organization you are affiliated with for the current fellowship year.
Field of Study	The Field of Study indicates the field of study you are associated with for the current fellowship year.

Understanding Your Fellowship Status Details

Your Fellowship Status Details area is available through the "View Fellowship Status Details/Request Tenure Change" link in the Fellows Optional Task List on your home page. The Fellowship Status Details area displays each of your past tenure records and your tenure plan for the following year. You also have the ability to request a change to your current year or next year tenure from this screen.

Tenure Details

* Required Field

1 item found. 1

Tenure Year	Organization	Abroad?	Field of Study	Tenure Status	Tenure Year Start	Tenure Months Used	Reserve Months Used	Forfeit Months Used	Stipend Used	COE Used	Travel Used	Action
2003	Australian National University	Y	Engineering - Computer Engineering	On Tenure	Fall	12	0		$27500.00	$10500.00	$0.00	Request Change

Back

Figure 13: Fellowship Status Details Screen

The list below describes the features of the Fellowship Status Details area.

Feature	Description
Fellowship Year	The Fellowship Year field indicates the academic year associated with the Fellowship Status record.
Organization	The Organization field indicates which organization you were associated with for the Fellowship Status record.
Abroad?	The Abroad field indicates if you were a Fellow Abroad during the tenure period. You are considered a Fellow Abroad if you are associated with a foreign organization.
Field of Study	The Field of Study field indicates your field of study during the tenure period.
Fellowship Status	The Fellowship Status field indicates your Fellowship Status for the given tenure period. (See Section 2.4 for an explanation of each Fellowship Status)
Fellowship Year Start	The Fellowship Year Start field indicates the start of the tenure period for the given Fellowship Status record which is either Summer or Fall.
Tenure Months Used	The Tenure Months Used field indicates the number of months you used for the given Fellowship Status record.
Reserve Months Used	The Reserve Months Used field indicates how many months the fellow has used for reserve.
Forfeit Months Used	The Forfeit Months Used field indicates how many months a fellow has used for forfeit.
Stipend Used	The Stipend Used field indicates the amount of stipend you were paid during the tenure period.
COE Used	The COE Used field indicates the amount of cost-of-education you were paid during the tenure period. (For an explanation of COE, please refer to the Information Booklet. You will find the Information Booklet as a Quick Link on the left hand side of the screen after you have logged into the system as a fellow. Once you have clicked on the link for the Information Booklet you will see that it is referred to as Information for Graduate Research Fellows and will be able to view it as a PDF, a DOC, or HTML.)
Travel Used	The Travel Used field indicates the amount of travel allowance you were paid during the tenure period.
GROW Used	The GROW Used field indicates the amount of any Gradutate Research Opportutnies Requests awarded during this period

Action	The Request Change link is available in the Action column and allows you to request a change to your Fellowship Status record. You may request a change to your current year tenure or to the tenure you have requested for the next academic year.

Accepting and Declining Award

Accepting and Declining Award

Once you have been notified that you have received a fellowship award, you may access the GRFP application to accept or decline your award offer. The **Accept/Decline Award** link will be available in your Fellows Task List until you have taken action to accept or decline the award or until the deadline for award acceptance. Prior to accepting or declining your award, your Fellow Data will reflect a fellow status of Awardee and a Fellowship Status of Awarded.

Accepting an Award

The process for accepting an award is a three-step process, which consists of Accepting Your Award, Providing an E-Signature and lastly printing the Certification Page for your records. The application will guide you through each step you need to complete in order to accept your award.

To Accept Your Award:

1. Select the **Accept/Decline Award** from the Fellows Task List.
2. Select the **'I accept the fellowship award offered me'** radio button.

Figure 14: Accept Award Button

3. Click the **Continue** button.

The E-Signature screen appears and displays the E-Signature Instructions, and the Certifications that you must certify so that you can accept your GRFP award. You may click the "View" link next to the E-Signature Instructions to see detailed instructions and definition of certification terms.

4. Read all Certifications carefully and **check the boxes next to each certification**. By checking each certification, you are certifying that statements

made therein are true and complete to the best of your knowledge; and agreeing to accept the obligation to comply with NSF award terms and conditions.

Figure 15: E-Signature Screen

NOTE: If you have already completed the e-Signature as part of the application submission process, this step will allow you to view the certification as you completed it at that time. Click the "Continue" button to proceed to the next step.

5. Once all checkboxes are checked, press the **Sign and Accept** button.

6. The **Print Certification Page** screen is displayed.

7. Select the **View PDF** link.

Figure 16: Print Certification Page Screen and Link

The certification page Adobe PDF document is displayed in a new window. You may print the page using the PDF print icon to save for your personal records.
After completing the award acceptance, fellow status will be changed to Active and your Fellowship Status will be changed to Award Accepted.

Declining an Award

In order to decline your award, you must complete the first step of the Accept/Decline Award task.
To Decline Your Award:

1. Select the **Accept/Decline Award** link from the Fellows Task List.

2. Select the **'I decline the fellowship award offered me'** radio button.

Figure 17: Decline Your Award Radio Button

3. Click the **Continue** button.

The Decline Award Confirmation and Decline Reasons page is displayed.

4. Select the reason(s) for declining the award from the **decline reasons list**.

Figure 18: Decline Reasons Screen

5. Click the Decline Award button.

A confirmation screen is displayed indicating you have successfully declined your award. Your fellow status will change to Declined and your Fellowship Status is changed to Declined.

View/Print Fellowship Award Offer Letter

The View/Print Fellowship Award Offer Letter link is provided so that you are able to view/print your fellowship award offer letter. The link will become available in your Fellows Optional Task List once you have been awarded a fellowship offer. The Fellowship Award Offer Letter is viewable and printable in Adobe PDF format.

To View the Fellowship Award Offer Letter:

1. Click **the View/Print Fellowship Award Offer Letter** link.

Figure 19: Fellows Task List Screen

The View/Print Fellowship Award Offer Letter Screen displays.

2. To View the Fellowship Award Offer letter in PDF format, click the **View PDF** button in the upper right hand corner of the View/Print Fellowship Award Offer Letter screen.

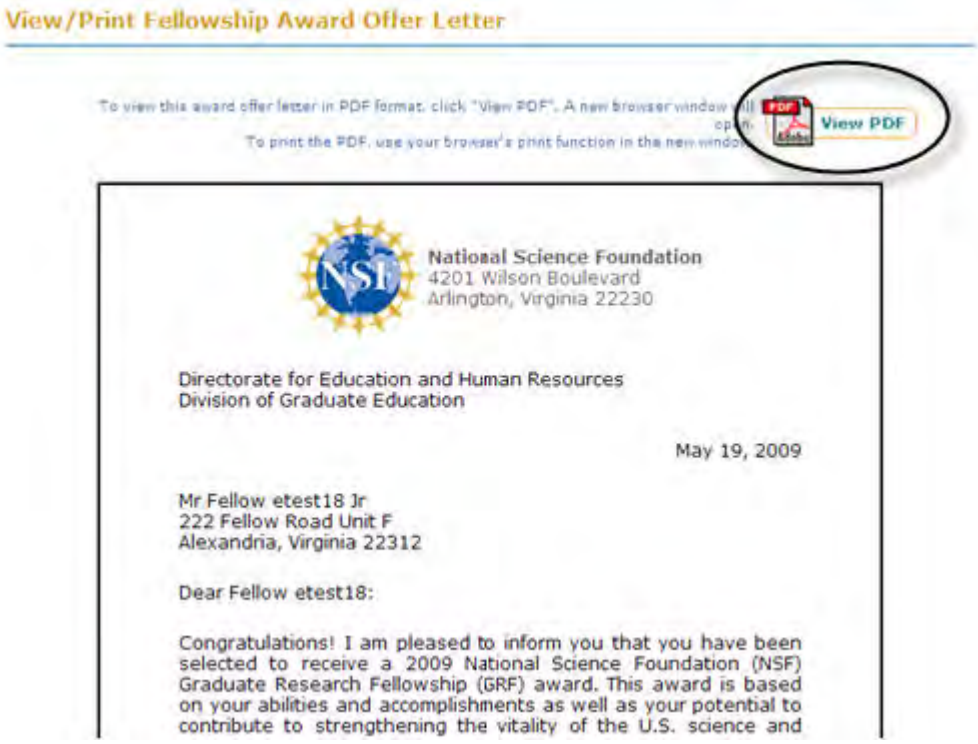


Figure 20: View/Print Fellowship Award Offer Letter Screen

NOTE: The View/Print Fellowship Award Offer Letter task is available to those awardees that have been awarded from 2005 and later.

View/Print Application Reviews

The **View / Print Application Reviews** link will be available in your Application Package Optional Task List once reviews are posted in the GRFP system. Click on this link so that you can View/Print the Application Reviews.

1. Click the **View / Print Application Reviews** link.

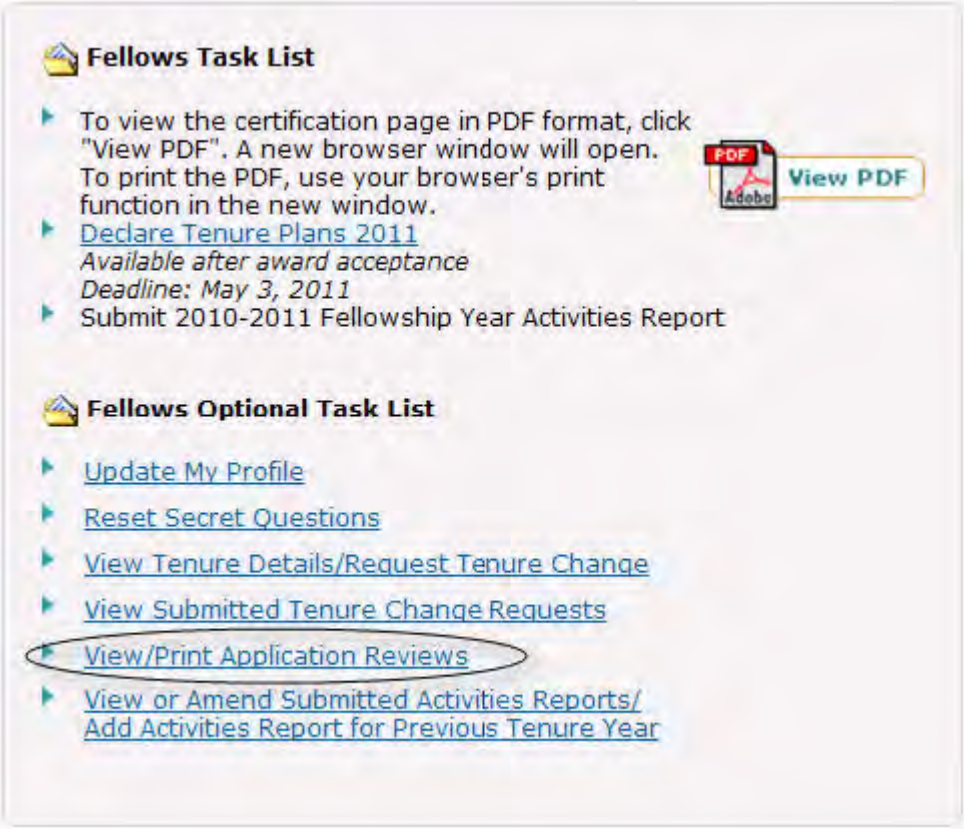


Figure 21: View/Print Application Reviews Link

To view the Application Reviews in a printable Adobe PDF version, click the View/Print Review link. This feature is only available after application submission and reviews have been posted in the GRFP System.

Please note your Application Reviews will be available in the GRFP system for a limited period of time. It is recommended that you print or save a copy of the Application Reviews PDF for your records.

2. To View the reviews in PDF format, click the **View / Print Review** link.

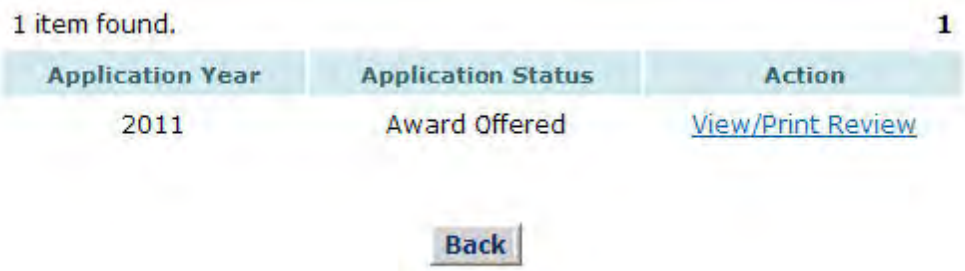


Figure 22: View/Print Fellowship Award Offer Letter Screen

Declaring Fellowship Status Plans

Declaring Fellowship Status Plans

Each year, you must declare your tenure plans for the next academic year. **The Declare Fellowship Status Plans** link will be available in your Fellows Task List until you have taken action to declare your plans or until the deadline for tenure plans declaration has passed. Once you have declared your tenure plans for the next year, a new Fellowship Status record will be reflected in your Tenure Details area.

The process for declaring your tenure plans is a three-step process. The application will guide you through each step you need to complete in order to declare your tenure plans. A Progress indicator is located on the right hand side of the page, indicating which steps you have completed and which steps are remaining.

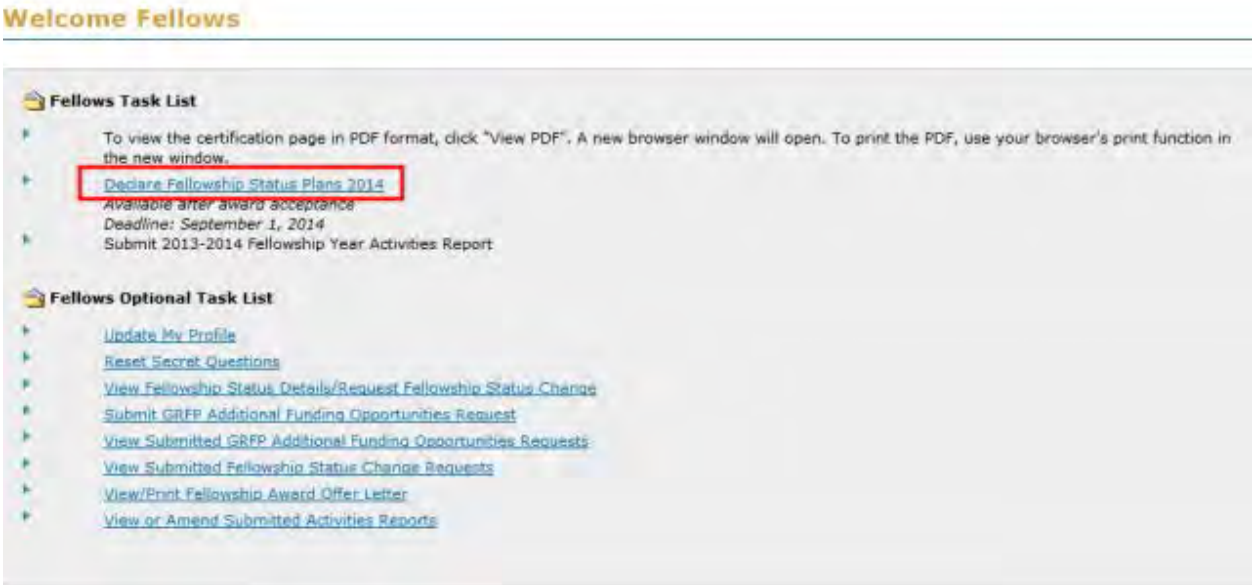


Figure 21: Declare Fellowship Status Plans Progress Indicator

WARNING: You must complete all steps in the process before your tenure plans information is saved. If you exit the Declare Fellowship Status Plans module before you have completed and submitted your plans, you will need to reenter the data you previously entered.

To Declare Your Fellowship Status Plans:

1. Select the **Declare Fellowship Status Plans** link from the Fellows Task List.

2. The E-Signature screen appears and displays the E-Signature Instructions, and the Certifications that you must certify so that you declare your tenure plans. You may click the "View" link next to the E-Signature Instructions to see detailed instructions and definition of certification terms.

3. Read all Certifications carefully and **check the boxes next to each certification**. By checking each certification, you are certifying that statements made therein are true and complete to the best of your knowledge; and agreeing to accept the obligation to comply with NSF award terms and conditions

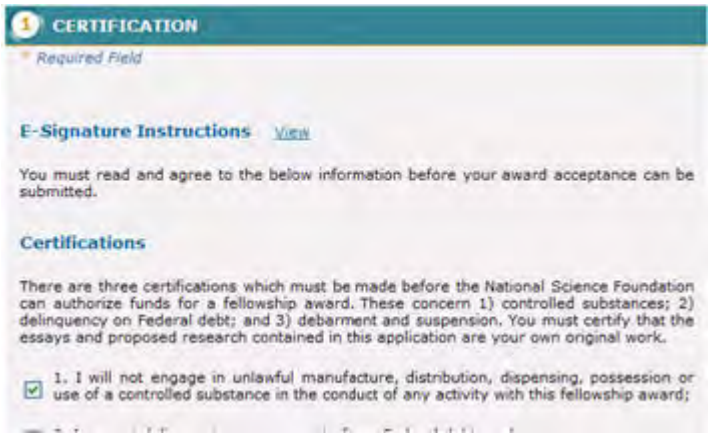


Figure 22: Verify Organization and Field of Study Screen

4. Select the **Yes** radio button to indicate that the organization and field of study listed are correct.

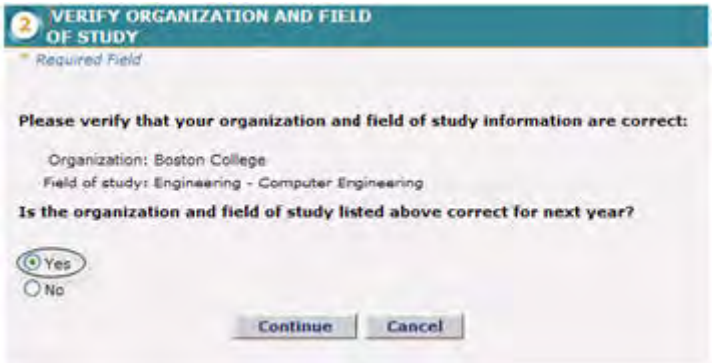


Figure 23: Verify Organization and Field of Study Screen

TIP: To request a change to your organization or field of study, please refer to Sections 4.1and 4.2 of this guide.

5. Click the Continue button.

The **Enter Fellowship Status Plans** screen appears and displays your options for your next fellowship year.

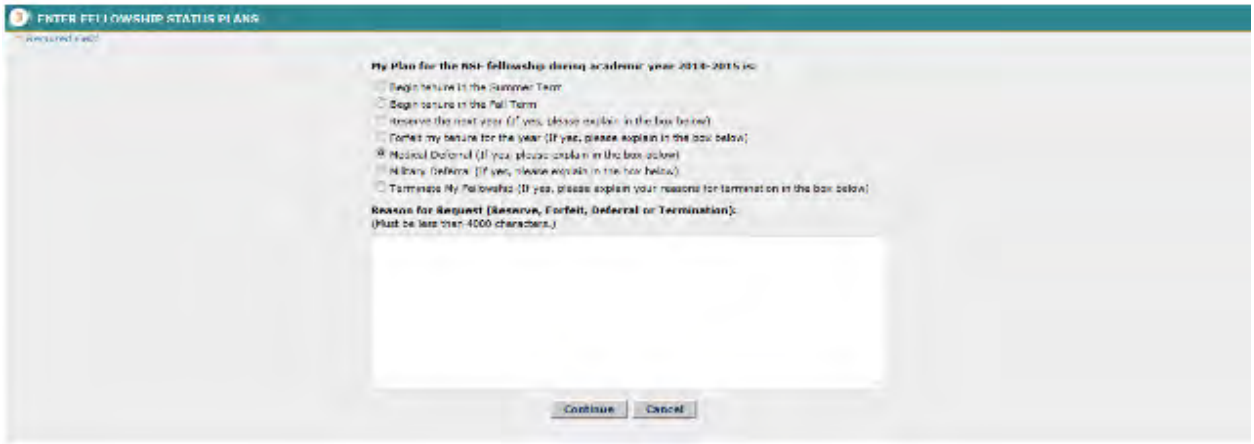


Figure 24: Enter Fellowship Status Plans Screen

TIP: For an explanation of the various Fellowship Status options and rules regarding each, please refer to the Information Booklet.

4. Select your Fellowship Status for the next year.

If you are currently On Tenure, you may select to:

a. Continue on Tenure

b. Reserve the Next Year (if less than 24 months of reserve used)

c. Forfeit the Next Year (if more than 24 months of reserve used)

d. Medical Deferral

e. Military Deferral

f. Terminate Your Fellowship

TIP: To request a year of reserve, medical or military deferral or to terminate your fellowship, please refer to Section 4.3, 4.4, 4.5, and 4.6 of this guide.

If you are currently On Reserve or On Deferral, you may select to:

a. Begin Fellowship Status in the Summer Term

b. Begin Fellowship Status in the Fall Term

c. Reserve the Next Year (if less than 24 months of reserve used)

d. Forfeit the Next Year (if more than 24 months of reserve used)

e. Medical Deferral

f. Military Deferral

g. Terminate Your Fellowship

5. Click the **Continue** button.

The Review and Submit screen appears and displays the data you have entered for your organization, field of study, and tenure for the next year.

Figure 25: Review and Submit Fellowship Status Plans Screen

If You Wish to Change any of the Selections:

1. Click the **Edit** link next to the selection you wish to change.
2. The screen for the organization, field of study, or tenure plans you have selected to change is displayed.
3. Enter the change you wish to make.
4. Click the **Continue** buttons until the Review and Submit screen is displayed.
5. Click the **Submit** button.

A confirmation screen is displayed indicating you have successfully submitted your tenure plans. You may select the Fellows Home Page link to return to your home page and task list.

Changing Your Organization

The organization you are affiliated with when you access the Declare Tenure Planes module is based on your current academic year organization. You may request a change to this organization while declaring your tenure plans for the next year. Changes to your organization require approval by the Coordinating Official at the organization to which you are transferring, and NSF. (For Fellows Abroad, approval is only required by NSF.)

To Request a Change to Your organization:

1. Select the **Declare Fellowship Status Plans** link from the Fellows Task List.

The Verify Organization/Field of Study screen appears and displays the organization and field of study you are currently affiliated with.

2. Select to the **No** radio button to indicate that the organization listed is not correct.

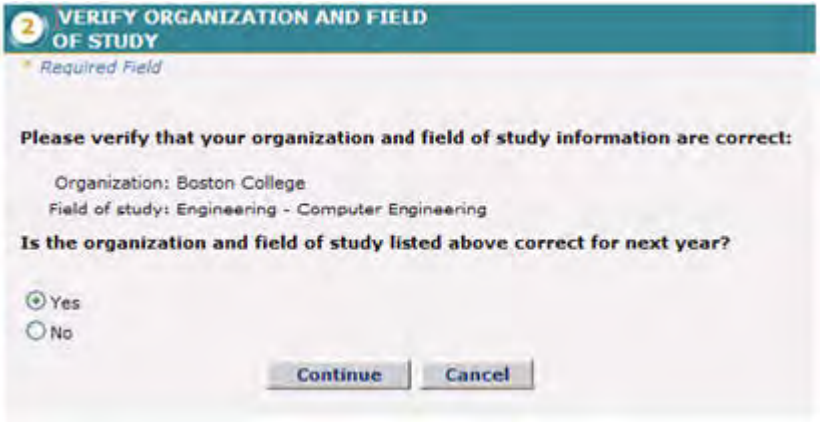


Figure 26: Verify Organization and Field of Study 'No' Radio Button

3. Click the **Continue** button.

The current organization and field of study are displayed with the ability to edit each.

4. Select your new organization from the drop down list.

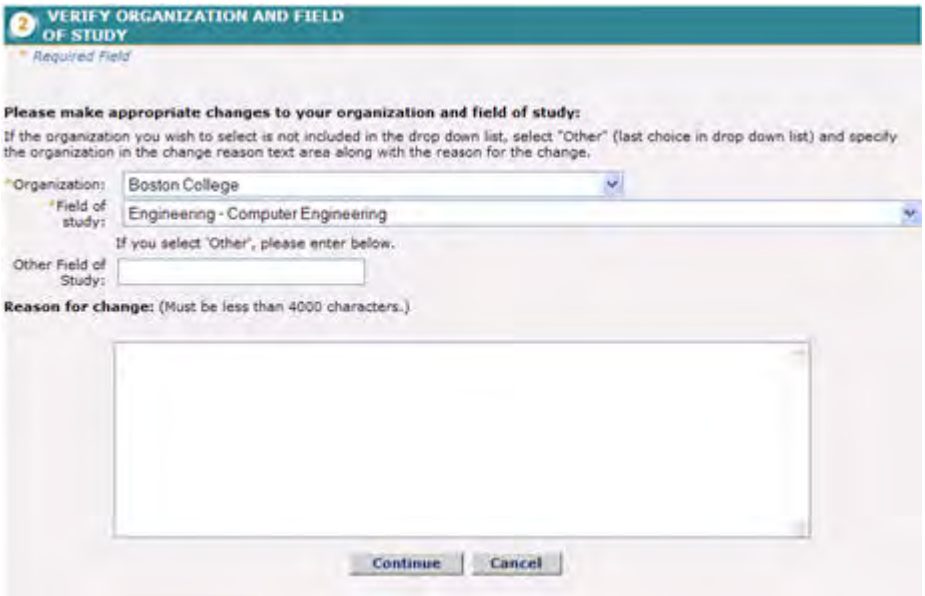


Figure 27: Verify Organization Screen

NOTE: If the organization you wish to select is not included in the drop down list select **Other (Specify in Reason for change text area)** from the drop down list and specify the new organization in the change reason text area along with the Reason for change.

The new organization is displayed in the organization field.

5. Enter a reason for the change.

6. Click the **Continue** button.

The Enter Fellowship Status Plans screen appears and displays your options for tenure.

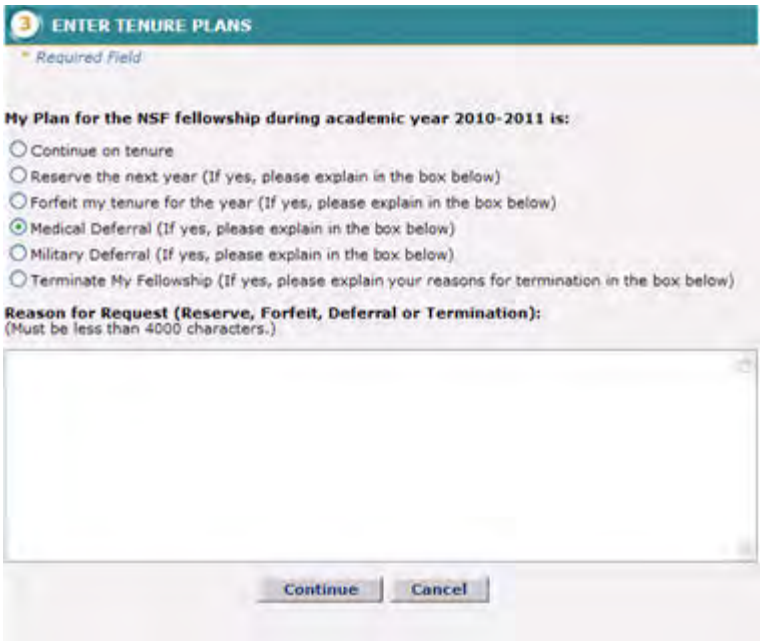


Figure 28: Enter Fellowship Status Plans Screen

7. Select the **radio button** of the tenure option you wish to choose.
8. If deferring tenure, enter the reason for the request.
9. Click the **Continue** button.

The Review and Submit screen appears and displays the data you have entered for your organization, field of study, and tenure for the next year.

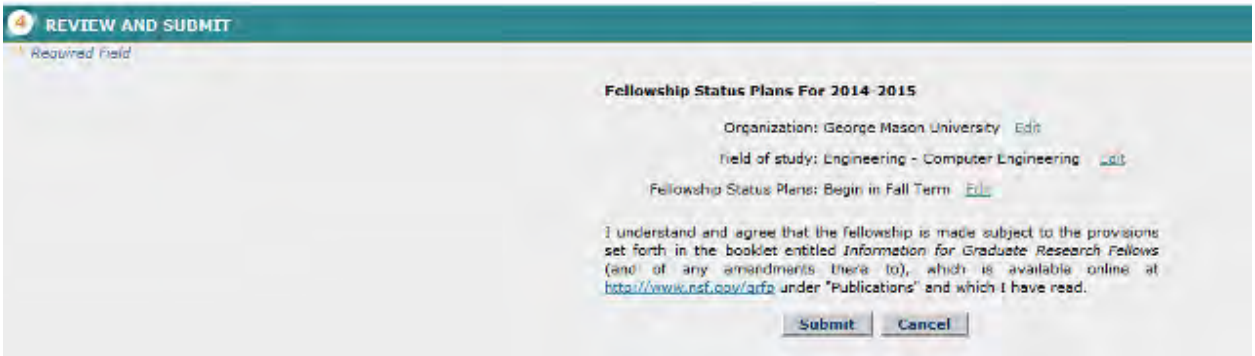


Figure 29: Review and Submit Fellowship Status Plans Screen

10. Click the **Submit** button.

A confirmation screen is displayed indicating you have successfully submitted your tenure plans. You may select the Fellows Home Page link to return to your home page and task list.

After declaring your tenure plans, your Fellowship Status in your Fellow Data section will appear as Pending Proposed CO Approval until your organization change request has been approved by a Coordinating Official at the new organization. Once this Coordinating Official

has approved the organization change request, your request will be forwarded to NSF for approval and your Fellowship Status will be changed to Pending NSF Approval. Once your organization change request has been approved by NSF, your tenure status for the next tenure year will be updated to reflect your selection. (For Fellows Abroad, approval is only required by NSF.)

Changing Your Field of Study

The field of study you are affiliated with when you access the Declare Fellowship Status Plans module is based on the field of study you are associated with during the current academic year. You may request a change to this field of study while declaring your tenure plans for the next year. Changes to your field of study require approval by your Coordinating Official and NSF.

To Request a Change to Your Field of Study:

1. Select the **Declare Fellowship Status Plans** link from the Fellows Task List.

The Verify Organization/Field of Study screen appears and displays the organization and field of study you are currently affiliated with.

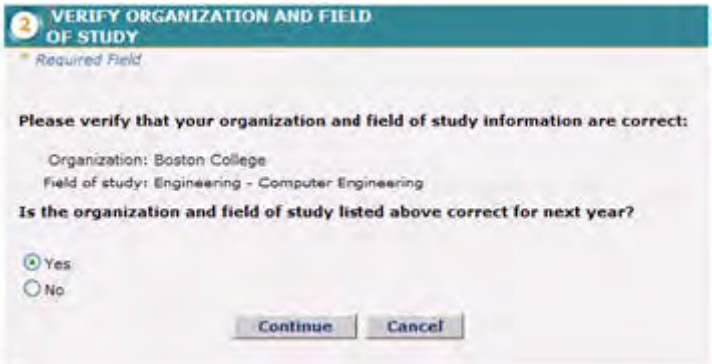


Figure 30: Verify Organization and Field of Study Screen

Select the **No** radio button to indicate that the field of study listed is not correct.

2. Click the **Continue** button.

The current organization and field of study are displayed with the ability to edit each.

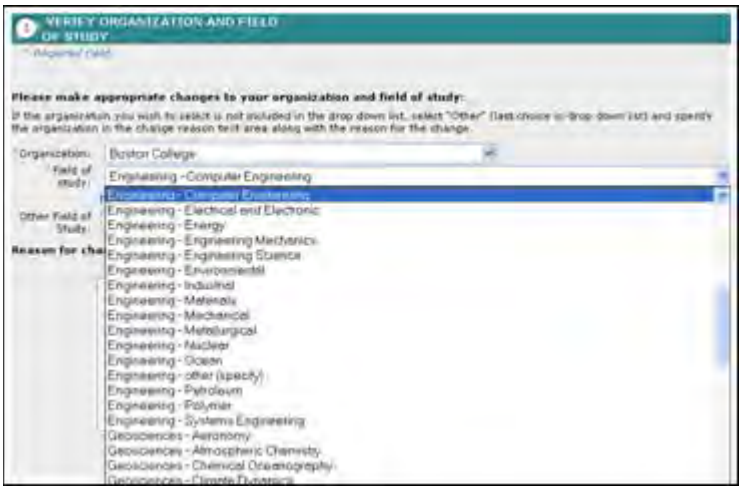


Figure 31: Field of Study Change Screen

3. Select your new field of study from the **field of study drop down list**.

NOTE: If the field of study you wish to select is not included in the drop down list, select the appropriate discipline with the words Other (specify) from the drop down list and specify the field of study in the Other Field of Study text box.

4. Enter a reason for the change.

5. Click the **Continue** button.

The Enter Fellowship Status Plans screen appears and displays your tenure options the next year.

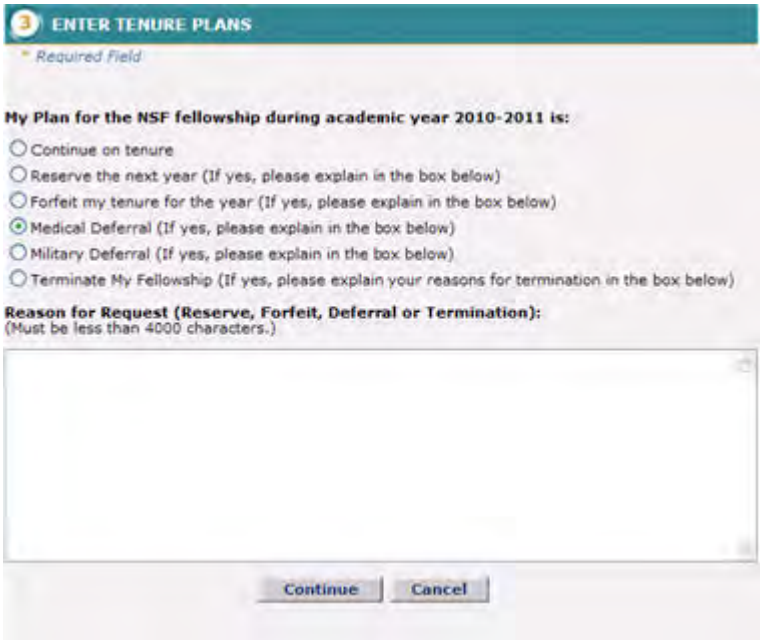


Figure 32: Enter Fellowship Status Plans Screen

6. Select the **radio button** for the tenure option you wish to choose.

7. If deferring tenure, enter the reason for the request.

8. Click the **Continue** button.

The Review and Submit screen appears and displays the data you have entered for your organization, field of study, and tenure for the next year.

9. Click the **Submit** button.

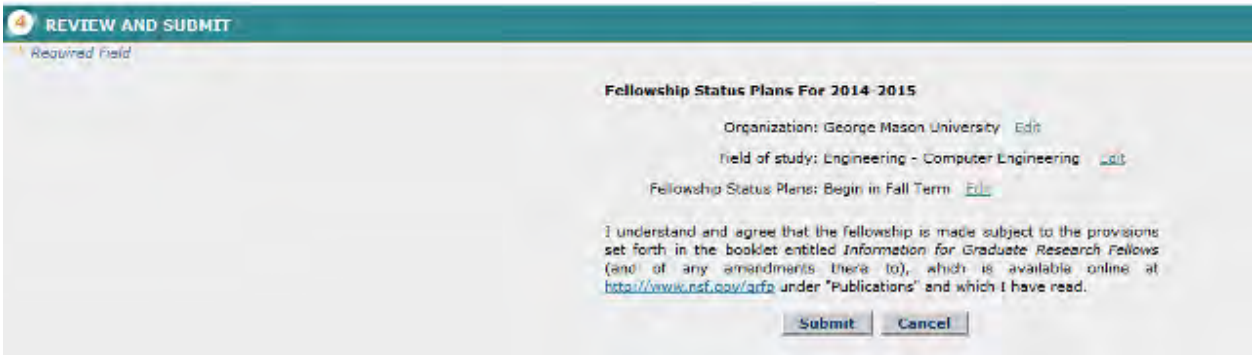


Figure 33: Review and Submit Fellowship Status Plans Screen

A confirmation screen is displayed indicating you have successfully submitted your tenure plans. You may select the Fellows Home Page link to return to your home page and task list.

After declaring your tenure plans, your Fellowship Status in your Fellow Data section will appear as Pending CO Approval until your field of study change request has been approved by your Coordinating Official. Once your Coordinating Official has approved the field of study change request, your request will be forwarded to NSF for approval and your Fellowship Status will be changed to Pending NSF Approval. Once your field of study change request has been approved by NSF, your tenure status for the next tenure year will be updated to reflect your selection. (For Fellows Abroad, approval is only required by NSF.)

Going on Reserve

In certain circumstances it may be necessary for you to go on reserve during your GRFP fellowship. You may request to go on reserve for the next year while declaring your tenure plans. Reserve requests require approval by your Coordinating Official and NSF. (For Fellows Abroad, approval is only required by NSF.)

TIP: For an explanation of reserve status and rules regarding going on reserve, please refer to the Information Booklet.

To Request a year of Reserve:

1. Select the **Declare Fellowship Status Plans** link from the Fellows Task List.

The Verify Organization/Field of Study screen appears and displays the organization and field of study you are currently affiliated with.

2. Select the Yes radio button to indicate that the organization and field of study listed are correct.

3. Click the **Continue** button.

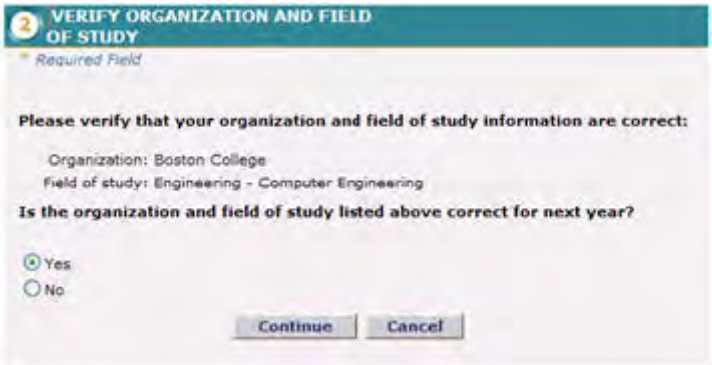


Figure 34: Verify Organization and Field of Study Screen

The Enter Fellowship Status Plans screen appears and displays your tenure options for the next year.

4. Select the **Reserve the next year** radio button.

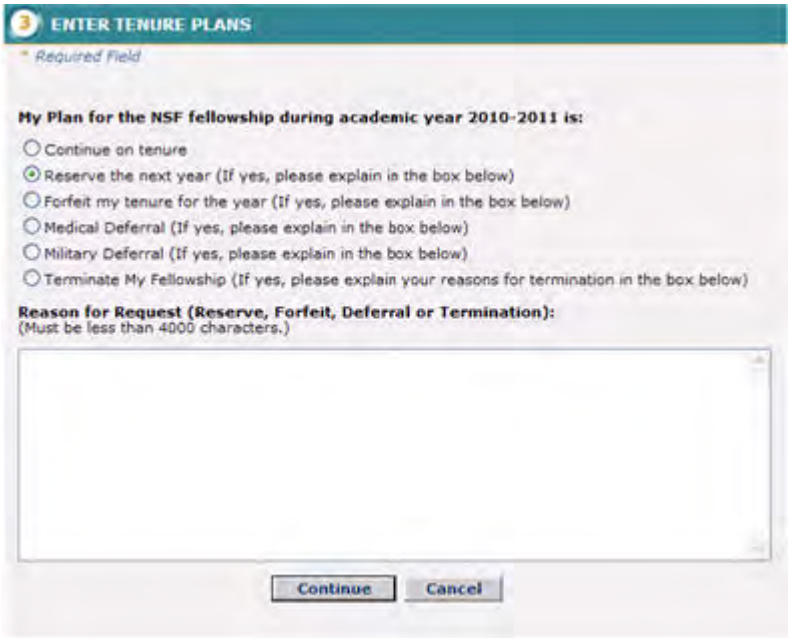


Figure 35: Reserve the next year Radio Button

5. Enter the reason for the request.

6. Click the **Continue** button.

The Review and Submit screen appears and displays the data you have entered for your organization, field of study, and tenure for the next year.

Figure 36: Review and Submit Fellowship Status Plans Screen

7. Click the **Submit** button.

A confirmation screen is displayed indicating you have successfully submitted your tenure plans. You may select the Fellows Home Page link to return to your home page and task list.

After declaring your tenure plans, your Fellowship Status in your Fellow Data section will appear as Pending CO Approval until your reserve request has been approved by your Coordinating Official. Once your Coordinating Official has approved the reserve request, your request will be forwarded to NSF for approval and your Fellowship Status will be changed to Pending NSF Approval. Once your reserve request has been approved by NSF, your tenure status for the next tenure year will be updated to On Reserve. (For Fellows Abroad, approval is only required by NSF.)

Going on Medical Deferral

In certain circumstances it may be necessary for you to defer your GRFP fellowship due to a medical condition. You may request a medical deferral while declaring your tenure plans. Medical deferral requests require approval by your Coordinating Official and NSF. (For Fellows Abroad, approval is only required by NSF.)

TIP: For an explanation of medical deferrals and rules regarding deferring, please refer to the Information Booklet.

To Request a Medical Deferral:

1. Select the **Declare Fellowship Status Plans** link from the Fellows Task List.

The Verify Organization/Field of Study screen appears and displays the organization and field of study you are currently affiliated with.

2. Select the **Yes** radio button to indicate that the organization and field of study listed are correct.

3. Click the **Continue** button.

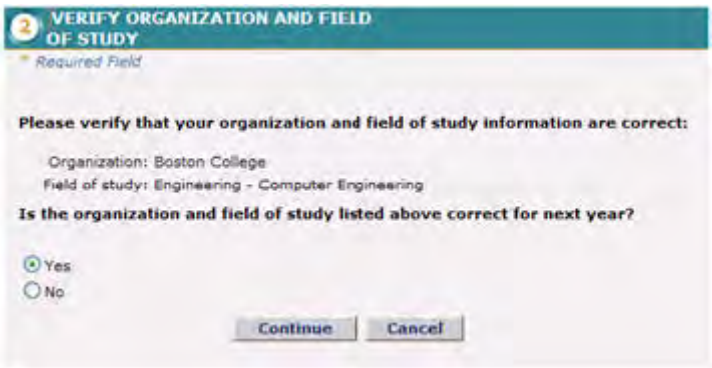


Figure 37: Verify Organization and Field of Study Screen

The Enter Fellowship Status Plans screen appears and displays your tenure options for the next year.

4. Select the **Medical Deferral** radio button.

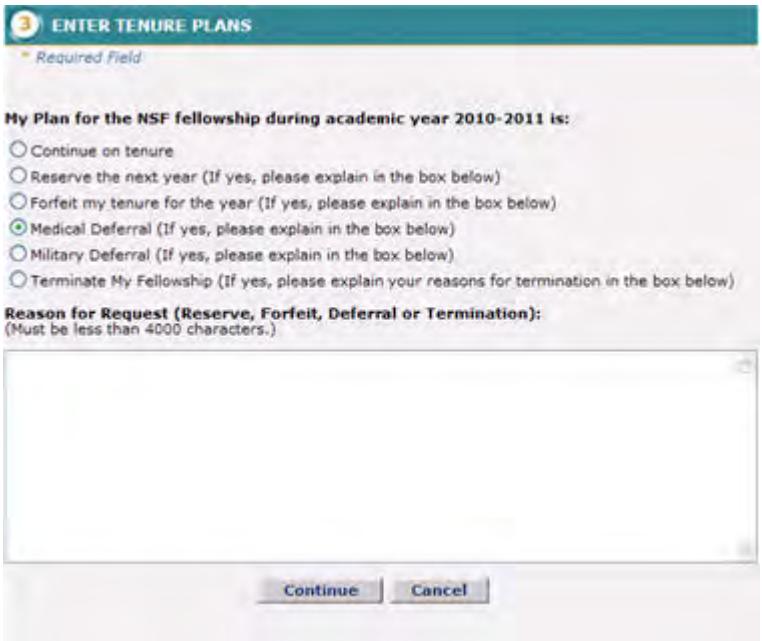


Figure 38: Medical Deferral Radio Button

5. Enter the reason for the request.
6. Click the Continue button.

The Review and Submit screen appears and displays the data you have entered for your organization, field of study, and tenure for the next year.

Figure 39: Review and Submit Fellowship Status Plans Screen

7. Click the **Submit** button.

A confirmation screen is displayed indicating you have successfully submitted your tenure plans. You may select the Fellows Home Page link to return to your home page and task list.

After declaring your tenure plans, your Fellowship Status in your Fellow Data section will appear as Pending CO Approval until your medical deferral request has been approved by your Coordinating Official. Once your Coordinating Official has approved the medical deferral request, your request will be forwarded to NSF for approval and your Fellowship Status will be changed to Pending NSF Approval. Once your medical deferral request has been approved by NSF, your tenure status for the next tenure year will be updated to On Medical Deferral. (For Fellows Abroad, approval is only required by NSF.)

Going on Military Deferral

In certain circumstances it may be necessary for you to defer your GRFP fellowship due to an obligation of military duty or deployment. You may request a military deferral while declaring your tenure plans. Military deferral requests require approval by your Coordinating Official and NSF. (For Fellows Abroad, approval is only required by NSF.)

TIP: For an explanation of military deferrals and rules regarding deferring, please refer to the Information Booklet.

To Request a Military Deferral:

1. Select the Declare Fellowship Status Plans link from the Fellows Task List.

The Verify Organization/Field of Study screen appears and displays the organization and field of study with which you are currently affiliated.

2. Select the Yes radio button to indicate that the organization and field of study listed are correct.

3. Click the Continue button.

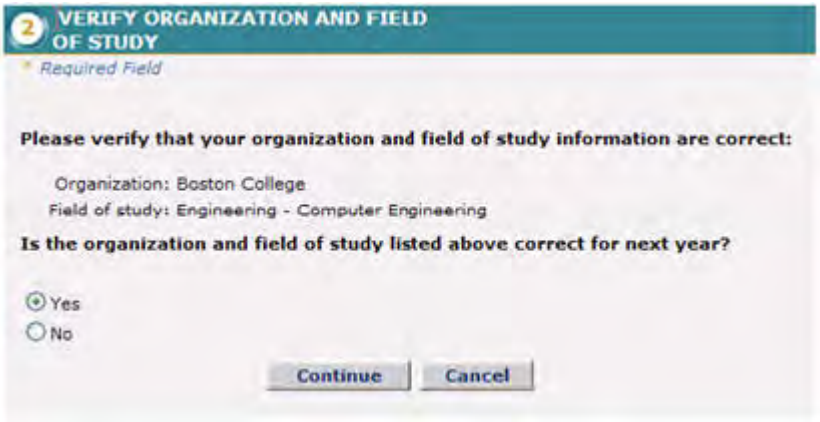


Figure 40: Verify Organization and Field of Study Screen

The Enter Fellowship Status Plans screen appears and displays your tenure options for the next academic year.

4. Select the **Military Deferral** radio button.

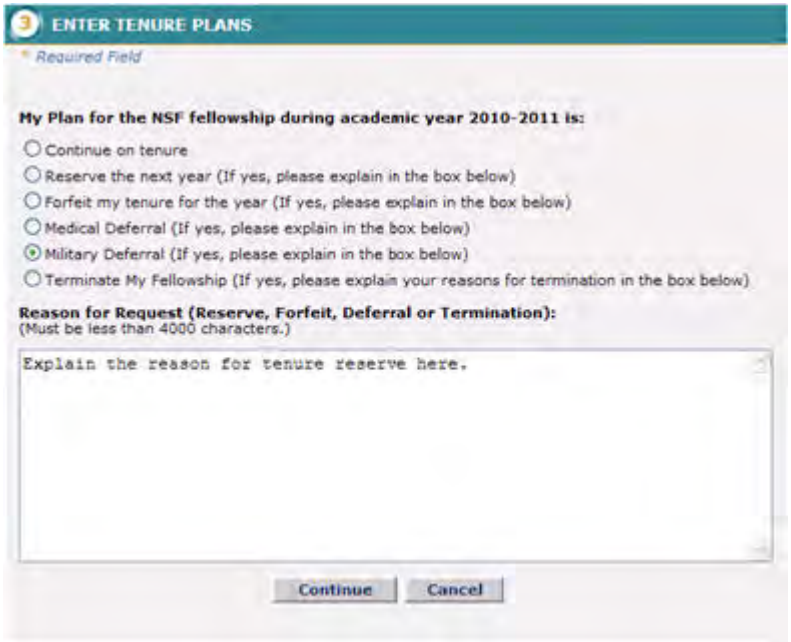


Figure 41: Military Deferral Radio Button

5. Enter the reason for the request.

6. Click the **Continue** button.

The **Review and Submit** screen appears and displays the data you have entered for your organization, field of study, and tenure for the next year.

Figure 42: Review and Submit Fellowship Status Plans Screen

7. Click the **Submit** button.

A confirmation screen is displayed indicating you have successfully submitted your tenure plans. You may select the Fellows Home Page link to return to your home page and task list.

After declaring your tenure plans, your Fellowship Status in your Fellow Data section will appear as Pending CO Approval until your military deferral request has been approved by your Coordinating Official. Once your Coordinating Official has approved the military deferral request, your request will be forwarded to NSF for approval and your Fellowship Status will be changed to Pending NSF Approval. Once your military deferral request has been approved by NSF, your tenure status for the next tenure year will be updated to On Military Deferral. (For Fellows Abroad, approval is only required by NSF.)

Terminating Your Fellowship

If you would like to discontinue your fellowship prior to using your three years of tenure, you may choose to terminate your fellowship. You may request to terminate your fellowship while declaring your tenure plans for the next year. Termination requests require approval by your Coordinating Official and NSF.

TIP: For an explanation of terminating your fellowship, please refer to the Information Booklet.

To Terminate Your Fellowship:

1. Select the **Declare Fellowship Status Plans** link from the Fellows Task List.

The Verify Organization/Field of Study screen appears and displays the organization and field of study with which you are currently affiliated.

2. Select the **Yes** radio button to indicate that the organization and field of study listed are correct.

3. Click the **Continue** button.

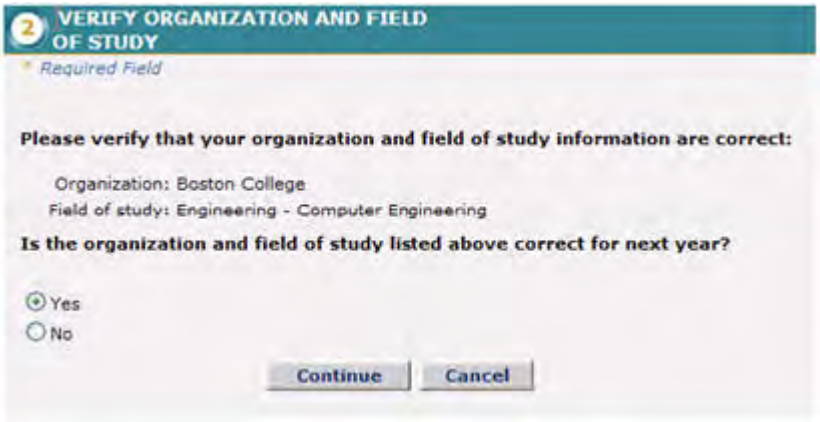


Figure 43: Verify Organization and Field of Study Screen

The Enter Fellowship Status Plans screen appears and displays your options for your first year of tenure.

4. Select the **Terminate My Fellowship** radio button.

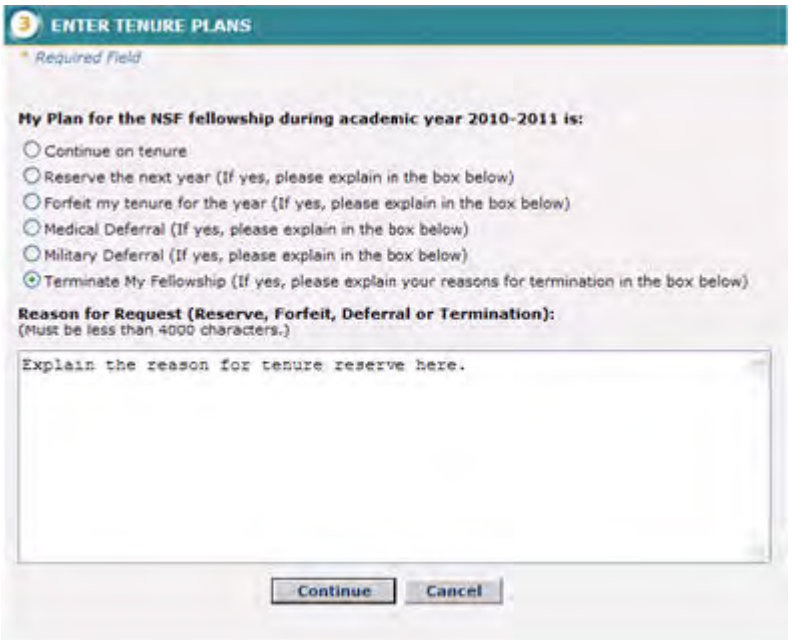


Figure 44: Terminate My Fellowship Radio Button

5. Enter the reason for the request.

6. Click the **Continue** button.

The Review and Submit screen appears and displays the data you have entered for your organization, field of study, and tenure for the next year.

7. Click the **Submit** button.

A confirmation screen is displayed indicating you have successfully submitted your tenure plans. You may select the Fellows Home Page link to return to your home page and task list.

After declaring your tenure plans, your Fellowship Status in your Fellow Data section will appear as Pending CO Approval until your termination request has been approved by your Coordinating Official. Once your Coordinating Official has approved the termination request, your request will be forwarded to NSF for approval and your Fellowship Status will be changed to Pending NSF Approval. Once your termination request has been approved by NSF, your tenure status will be updated to Terminated. (For Fellows Abroad, approval is only required by NSF.)

Requesting a Fellowship Status Change

Requesting a tenure Change

In some circumstances, it may be necessary to request a change to your tenure during the academic year. Tenure changes include changes to your Fellowship Status, organization, or field of study. You may also use the Request Tenure Change feature to request a change to your tenure for the next academic year. The ability to request changes to your tenure for the next academic year is available once you have declared your tenure plans. All tenure change requests require approval by your Coordinating Official and NSF. Changes to organization require approval by Coordinating Officials at both the current and the proposed organization. (For Fellows Abroad, approval is only required by NSF.)

Changing Your Organization

To Request a Change of organization:

1. Select the **View Fellowship Status Details/Request Fellowship Change** link from your Fellows Optional Task List.

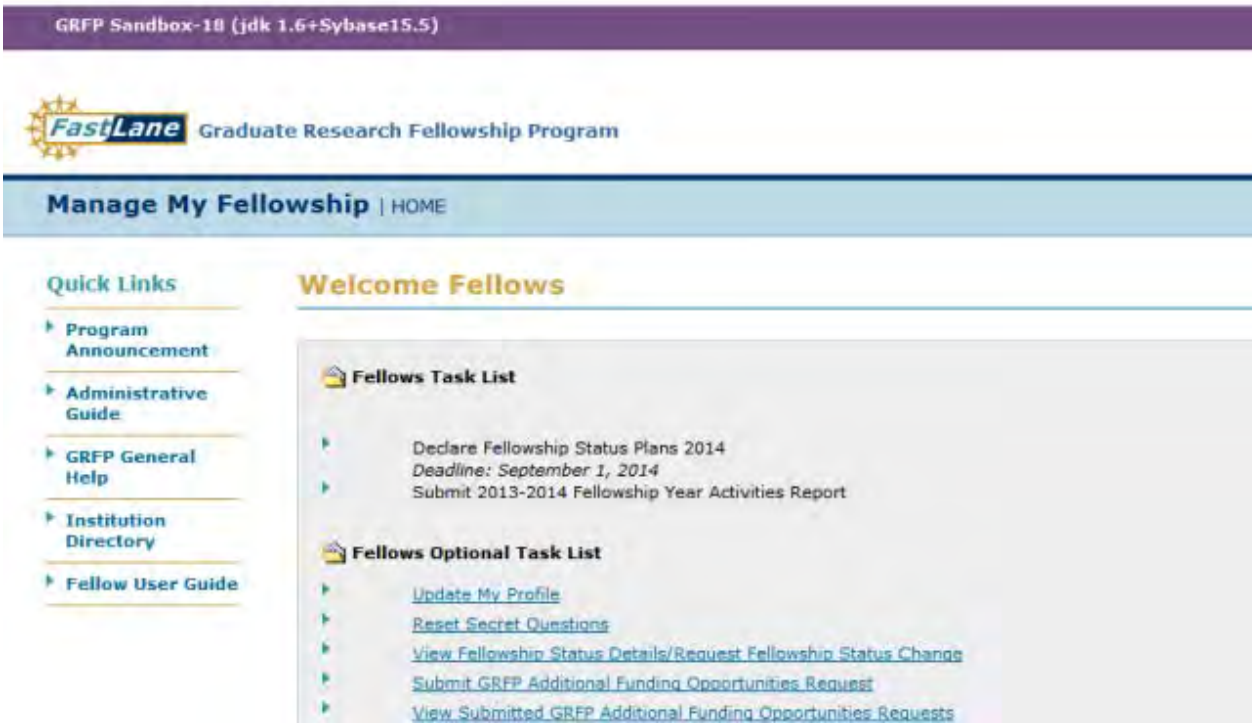


Figure 44: View Fellowship Status Details Link

All of your tenure records for your fellowship are displayed. A **Request Change** link is available next to each Fellowship Status record that you have the ability to change. You may not request a change to a fellowship year that has ended.

Figure 45: Fellowship Status Details Screen

2. Select the **Request Change** link next to the Fellowship Status record for which you wish to request a change.

The Request Fellowship Status Change screen is displayed.

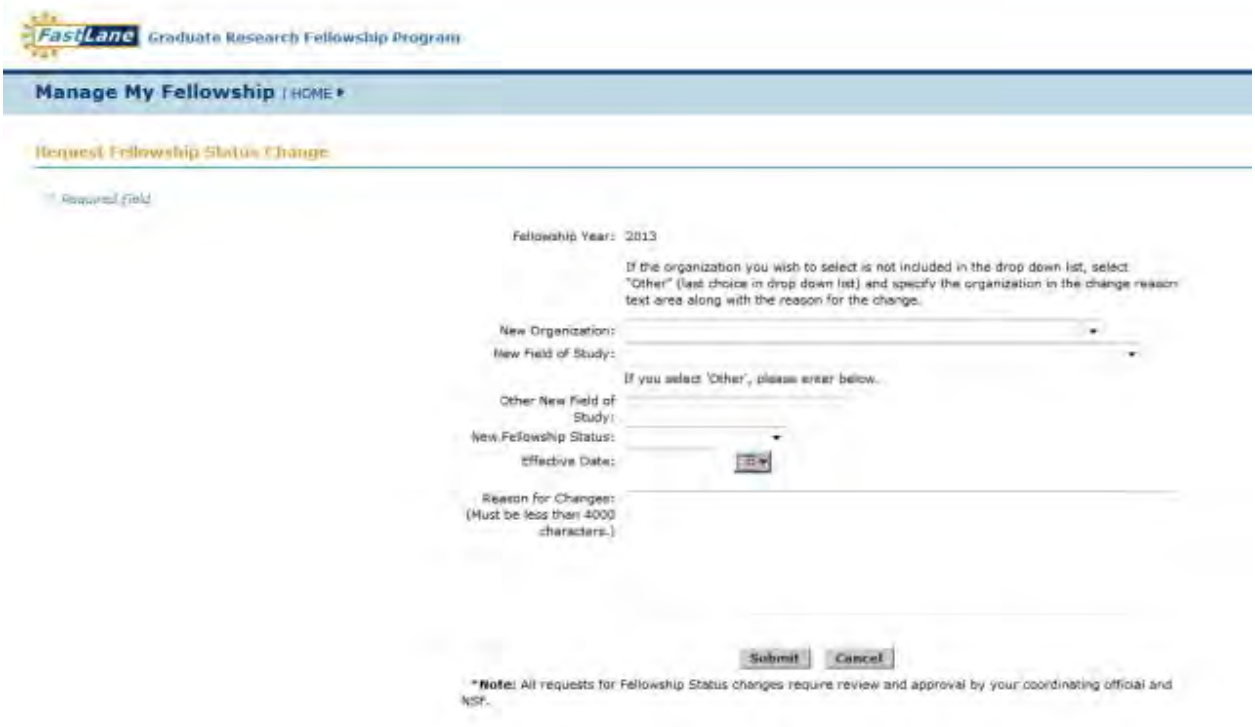


Figure 46: Request Fellowship Status Change Screen

3. Select your **new organization** from the drop down list.

NOTE: Only enter an Organization in the New Organization field if your Organization is changing. If you enter an Organization that matches your current Organization, you will receive an error message when selecting Submit.

NOTE: If the organization you wish to select is not included in the drop down list select **Other (Specify in Reason for change text area)** from the drop down list and specify the new organization in the change reason text area along with the **Reason for change**.

The new organization is displayed in the organization field.

The Request Fellowship Status Change screen is displayed and the organization you selected is displayed in the **New Organization** field.

4. Enter the effective date of the organization change using the calendar icon. A calendar is displayed in a separate window and allows you to select a date.

Figure 47: Calendar Window

TIP: The Start Date should be entered as the date you would like to officially change your fellowship from one organization to another. Up through the effective date, you will continue to receive stipend payments from your current organization. After the effective date, your stipend payments will be made through the new organization.

5. Enter the reason for the change.

6. Click the **Submit** button.

A confirmation screen is displayed indicating you have successfully submitted the change request. You may select the Fellows Home Page link to return to the home page and your task list. Changes to organization require approval by both a Coordinating Official at your current institution, and approval by a Coordinating Official at the institution proposed in your request (For Fellows Abroad, approval is only required by NSF.) In your Fellow Data section, your Fellowship Status for the Fellowship Status record for which you request the change, will reflect a status of Pending CO Approval until your Coordinating Official has approved the request. Once your CO has approved the request, your Fellowship Status will be updated to reflect a status of Pending Proposed CO Approval. Once a Coordinating Official at the new organization has approved your request, the tenure request will be forwarded to NSF for approval, and your Fellowship Status will be updated to Pending NSF Approval. Finally, once NSF has approved the request, your Fellowship Status will return to the previous status it was before the request was submitted. A new Fellowship Status record will also be added for the fellowship year to reflect the change in your organization. Your current organization will be updated to the new organization once you're the tenure effective date included in the request has passed

Changing Your Field of Study

To Request a Change to your Field of Study:

1. Select the **View Fellowship Status Details/Request Tenure Change** link from your Fellows Optional Task List.

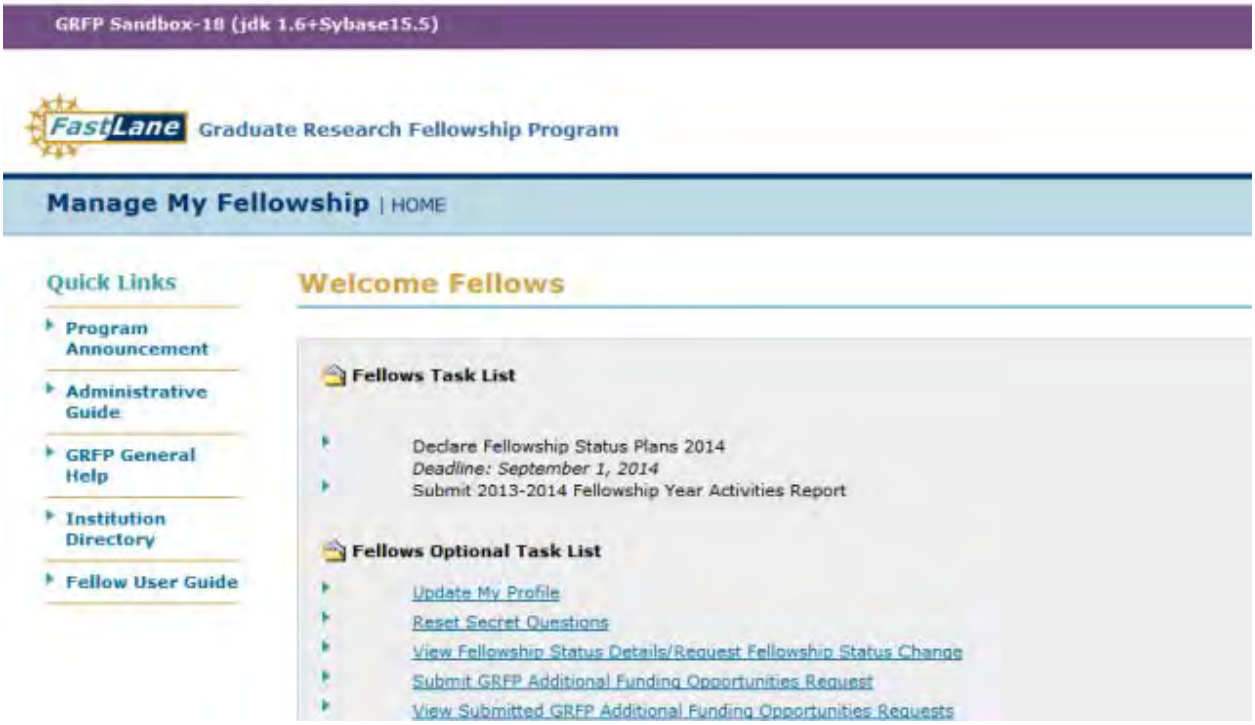


Figure 48: View Fellowship Status Details Link

All of your Fellowship Status records for your fellowship are displayed. A **Request Change** link is available next to each Fellowship Status record that you have the ability to change. You may not request a change to a fellowship year that has ended.

2. Select the **Request Change** link next to the Fellowship Status record for which you wish to request a change.

Figure 49: Request Change Link

The Request Tenure Change screen is displayed.

3. Select the new field of study from the **New Field of Study** drop-down list.

NOTE: Only enter a Field of Study in the New Field of Study field if your Field of Study is changing. If you enter a Field of Study that matches your current Field of Study, you will receive an error message when selecting Submit.

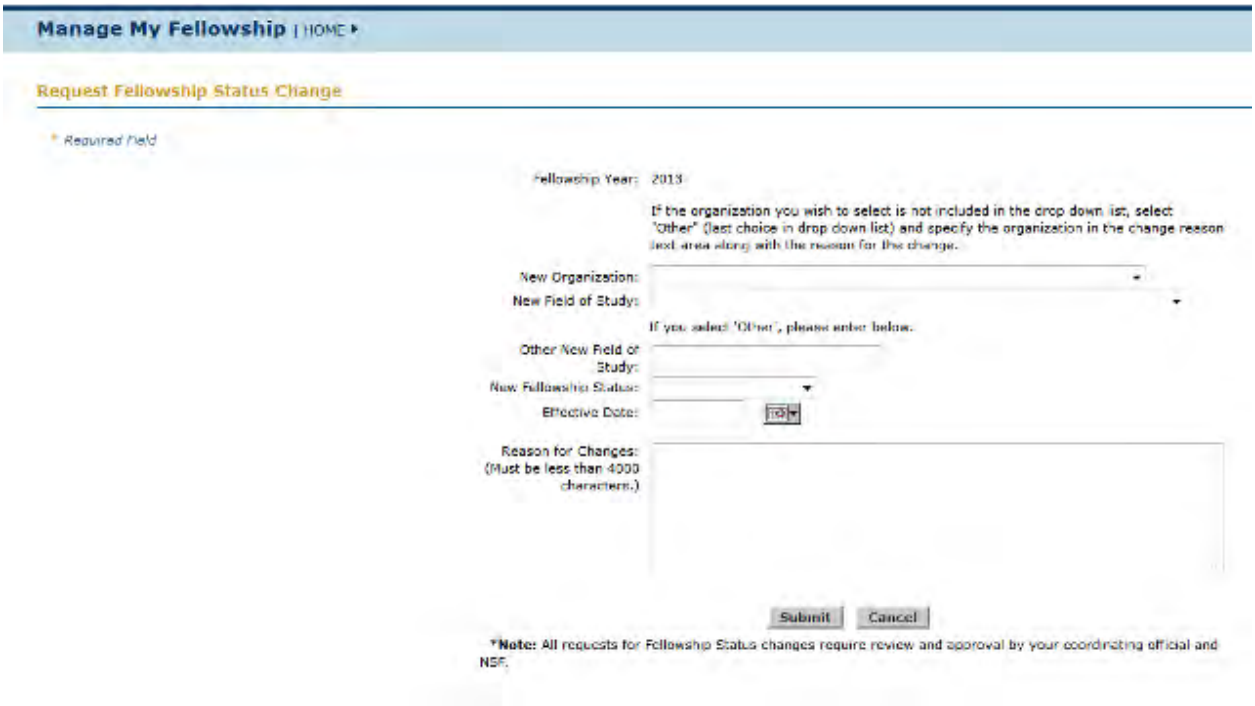


Figure 50: New Field of Study Drop-Down List

4. Enter the effective date of the field of study change using the calendar icon.

5. A calendar is displayed in a separate window and allows you to select a date.

Figure 51: Calendar Window

6. Enter the reason for the change.

7. Click the **Submit** button.

A confirmation screen is displayed indicating you have successfully submitted the change request. You may select the Fellows Home Page link to return to the home page and your task list. In your Fellow Data section, your Fellowship Status for the Fellowship Status record for which you request the change, will reflect a status of

Pending CO Approval until your Coordinating Official has approved the request. Once your CO has approved the request, your Fellowship Status will be updated to reflect a status of Pending NSF Approval. Once NSF has approved the request, your Fellowship Status will return to the previous status it was before the request was submitted and the Fellowship Status record will be updated to reflect the new field of study. (For Fellows Abroad, approval is only required by NSF.)

Changing Your Fellowship Status

To Request a Change to your Fellowship Status:

1. Select the **View Fellowship Status Details/Request Tenure Change** link from your Fellows Optional Task List.

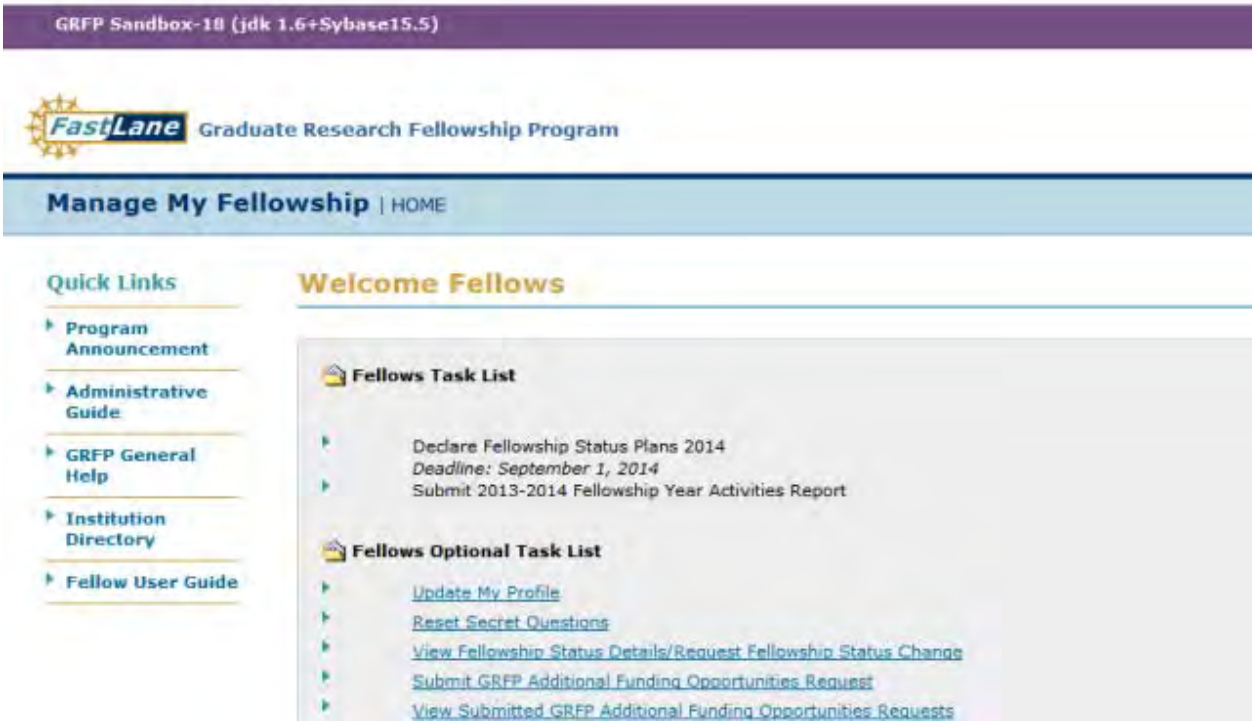


Figure 52: View Fellowship Status Details Link

All of your Fellowship Status records for your fellowship are displayed. A **Request Change** link is available next to each Fellowship Status record that you have the ability to change. You may not request a change to a fellowship year that has ended.

2. Select the **Request Change** link next to the Fellowship Status record that you wish to change.

Figure 53: Request Change Link

The Request Tenure Change screen is displayed. The tenure statuses that you may request a change to are displayed in the **New Fellowship Status** drop-down box.

TIP: For an explanation of the various tenure options and rules regarding each, please refer to the Information Booklet.

3. Select the New Fellowship Status from the New Fellowship Status drop-down list.

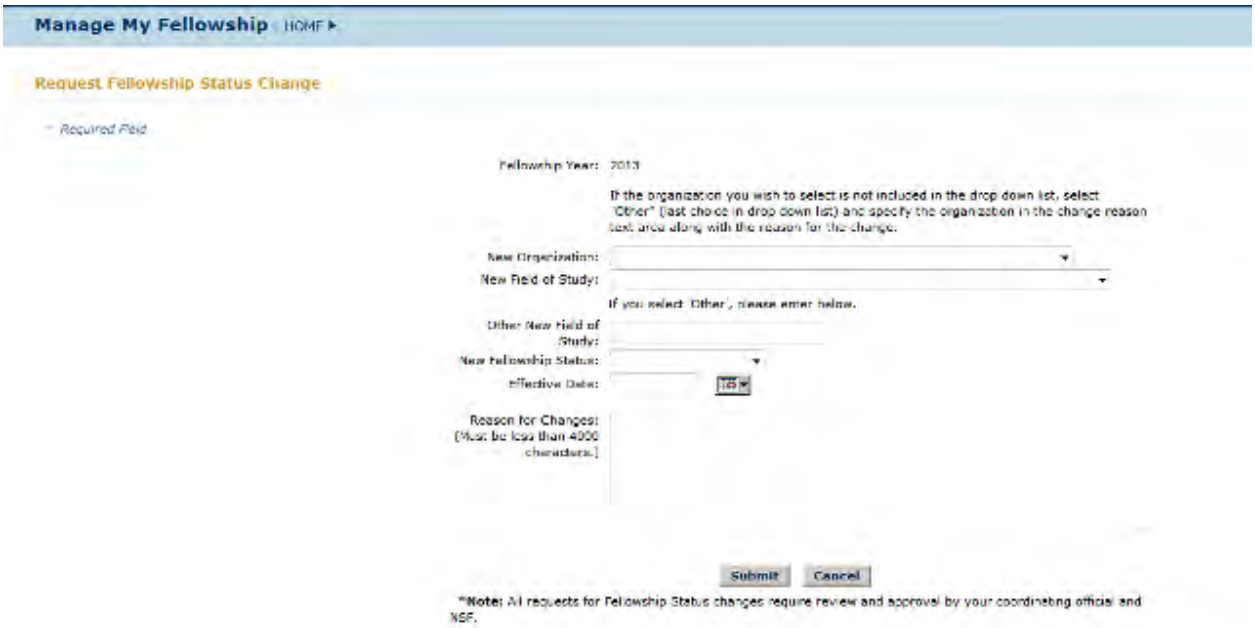


Figure 54: New Fellowship Status Drop-Down List

NOTE: Only enter a Fellowship Status in the New Fellowship Status field if your Fellowship Status is changing. If you enter a Field of Study that matches your current Field of Study, you will receive an error message when selecting Submit.

4. Enter the effective date of the Fellowship Status change using the calendar icon. A calendar is displayed in a separate window and allows you to select a date.

Figure 55: Calendar Window

5. Enter the reason for the change.

6. Click the **Submit** button.

A confirmation screen is displayed indicating you have successfully submitted the change request. You may select the Fellows Home Page link to return to the home page and your task list. In your Fellow Data section, your Fellowship Status for the Fellowship Status record you request the change for, will reflect a status of Pending CO Approval until your Coordinating Official has approved the request. Once your CO has approved the request, your Fellowship Status will be updated to reflect a status of Pending NSF Approval. Once NSF has approved the request, you Fellowship Status will be updated to reflect the new status you have requested. (For Fellows Abroad, approval is only required by NSF.)

View Submitted Fellowship Status Change Requests

The **View Submitted Fellowship Status Change Requests** link will be available in your Fellows Task List.

1. To View the **Submitted Fellowship Status Change Requests**, Click on the View Submitted Fellowship Status Change Requests link.

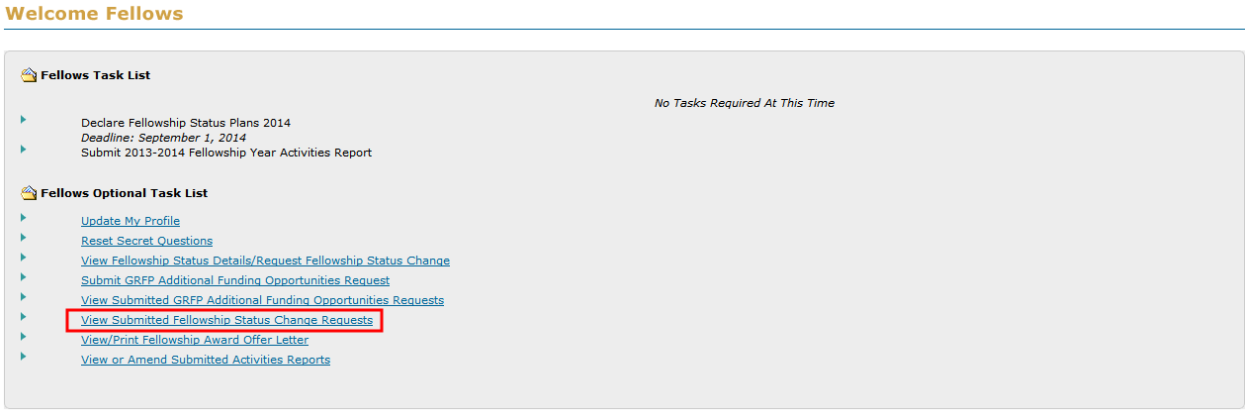


Figure 56: Fellows Task List Screen

The **View Submitted Fellowship Status Change Requests** screen will appear.

The View Fellowship Status Change Requests screen will appear so that you can view all of your tenure change requests that you have submitted. The Submitted Tenure

Change Requests screen will provide you with information pertaining to the Request Date, Date the Change is Effective, affected Fellowship Year, Organization, and the Status of the Request.

NOTE: For tenure change requests involving a mid-year transfer of Organization, the Status of the Request after submission will first read Pending CO Approval as the CO at your Current Organization must first approve the request. After the CO at your current Organization has approved the request, the CO at your proposed Organization must approve the request and your request status will be Pending Proposed CO Approval. Following Proposed CO approval, the request status will be Pending NSF Approval.

2. To view a particular tenure change request, click the **View** link in the action column. The link will provide you with the information pertaining to the Request Date, Date the Change is Effective, affected Fellowship Year, Organization, the Status of the Request and the Reason for the Request.

Figure 57: View Fellowship Status Change Requests Screen

The Fellowship Status Change Request screen will appear.

Figure 58: Fellowship Status Change Request Screen

Submitting Additional Funding Opportunities Requests

Submitting Additional Funding Opportunities Requests

Fellows have the option of submitting requests for Additional Funding Opportunities available to Graduate Research Fellowship Program Fellows. Each Funding Opportunity has a unique application format and application period. The system will guide you through each step needed to submit your Additional Funding Opportunity Request.

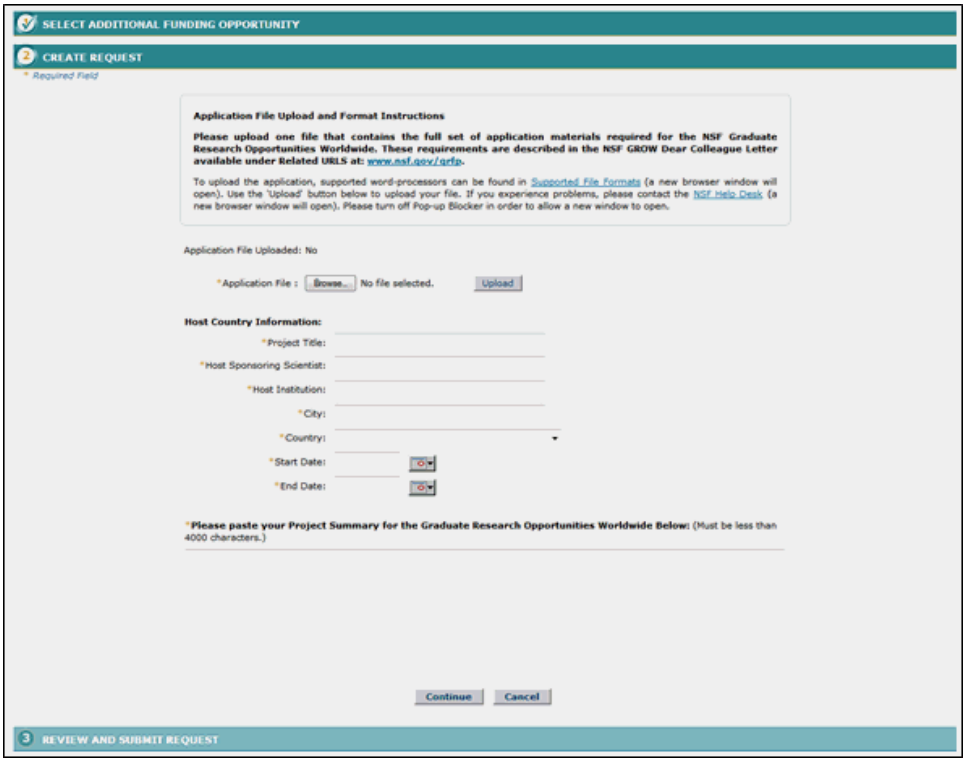
Submitting an Additional Funding Opportunities Request

To submit an additional Funding Opportunity Request:

1. Click the **Submit Additional Funding Opportunities Request** link from your Fellows Optional Task List

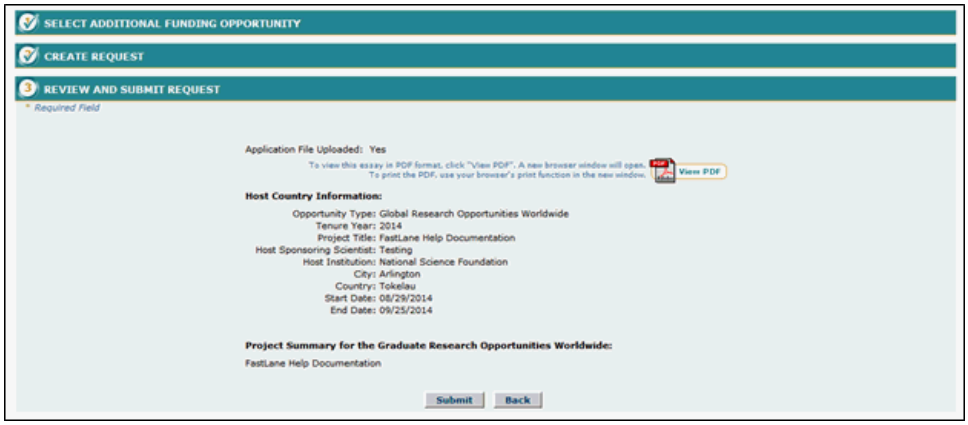
2. Select the Funding Opportunity type in Step 1 of the Application process and select continue (A dropdown list of Agencies to select from appear if the Graduate Research Internship Programs option is selected)

3. Complete the application form, ensuring that you have completed all required information and select Continue. Required fields are marked with an astersisk.



If a document upload is required, select the browse button and locate the file you wish to upload. Select the upload button and the PDF conversion process will begin. Once the document has been uploaded, proofread the PDF file in your browser window and select Accept to complete the upload process.

4. Review the application information on the Review and Submit Request screen. If all information is complete, select the Submit button to submit your request for approval



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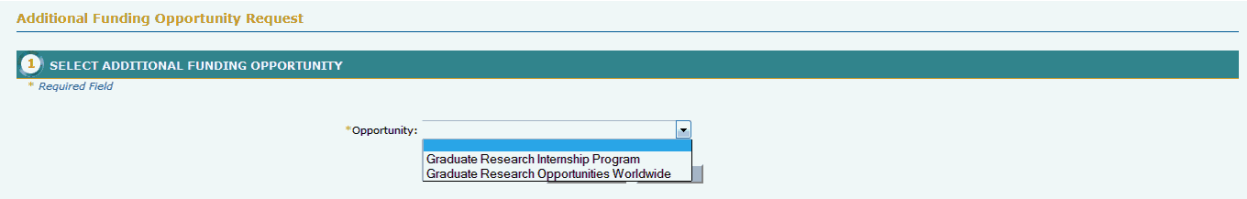
Submitting an Additional Funding Opportunities Request

To submit an additional Funding Opportunity Request:

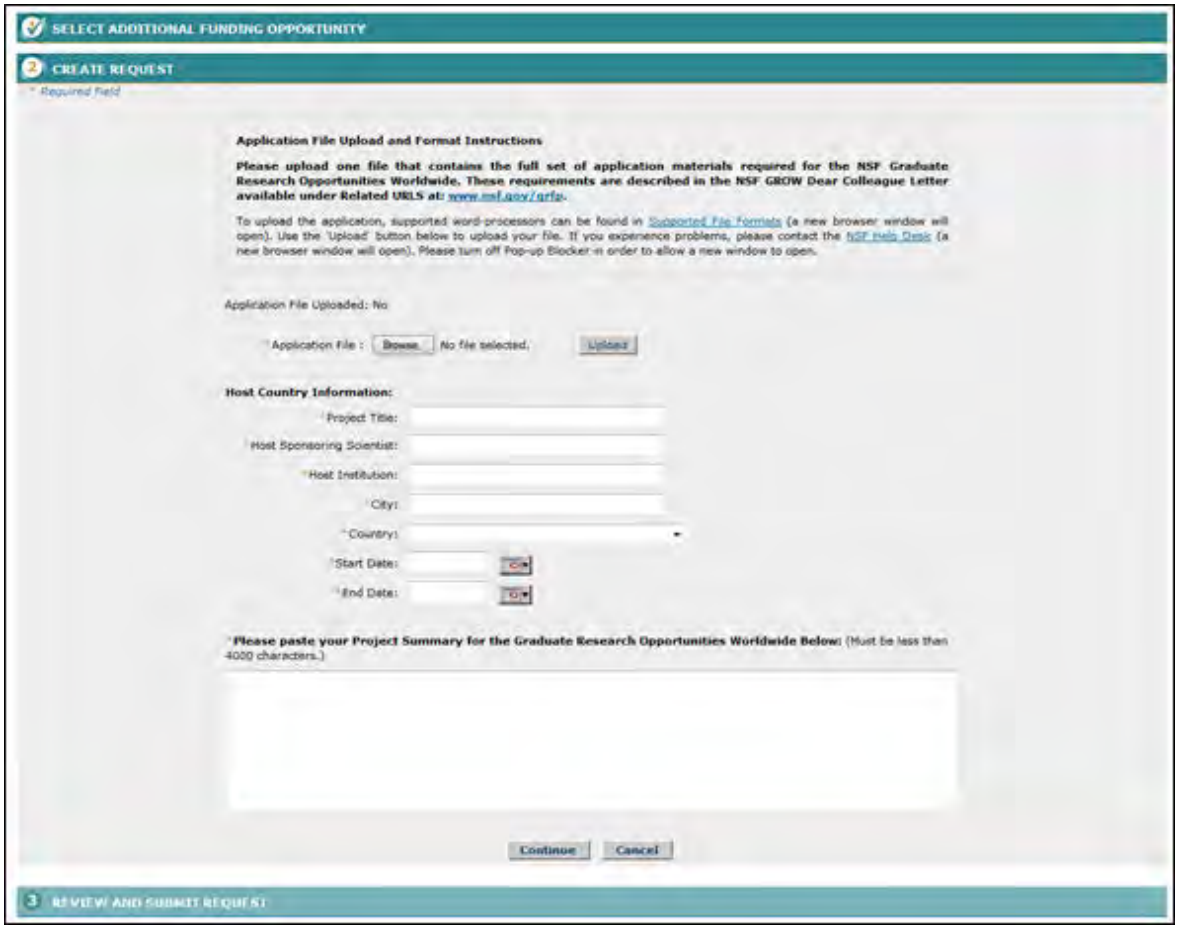
1. Click the **Submit Additional Funding Opportunities Request** link from your Fellows Optional Task List

2. Select the Funding Opportunity type in Step 1 of the Application process and select continue

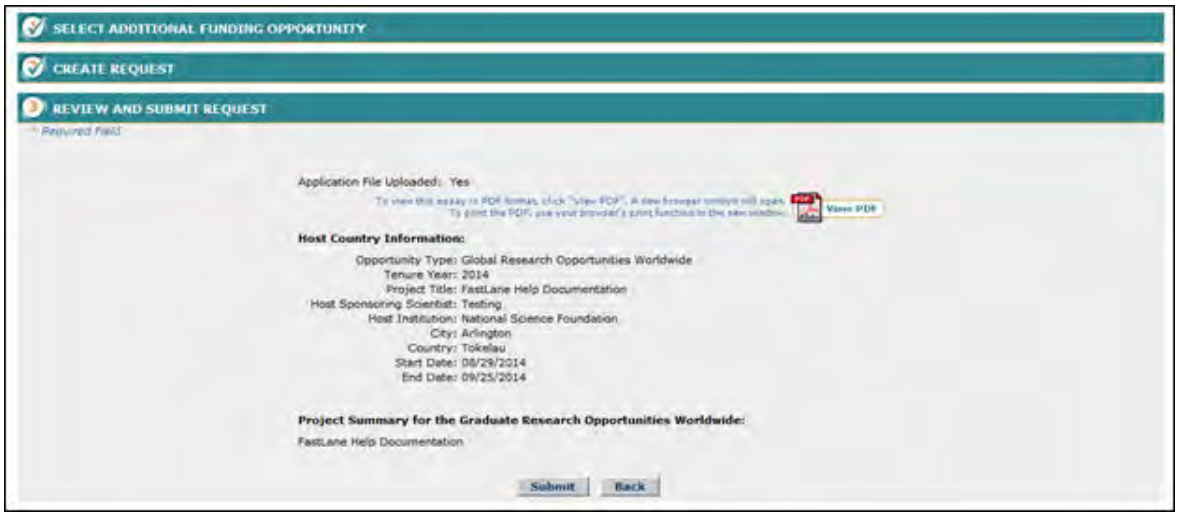


3. Complete the application form, ensuring that you have completed all required information and select Continue. Required fields are marked with an asterisk.
NOTE: If the Graduate Research Internship Program option is selected a drop down list of agencies to select from will appear.

If a document upload is required, select the browse button and locate the file you wish to upload. Select the upload button and the PDF conversion process will begin. Once the document has been uploaded, proofread the PDF file in your browser window and select Accept to complete the upload process.



4. Review the application information on the Review and Submit Request screen. If all information is complete, select the Submit button to submit your request for approval.

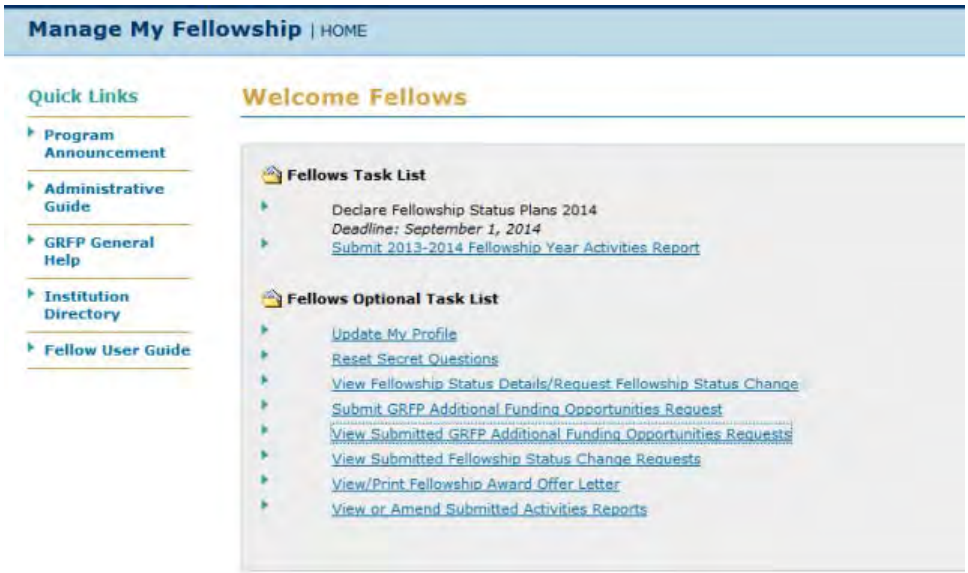


Withdrawing an Additional Funding Opportunities Request

Fellows have the option of withdrawing requests for Additional Funding Opportunities before the application is submitted to the CO for approval. Once the application has been submitted, however, the application can only be cancelled from an administrator.

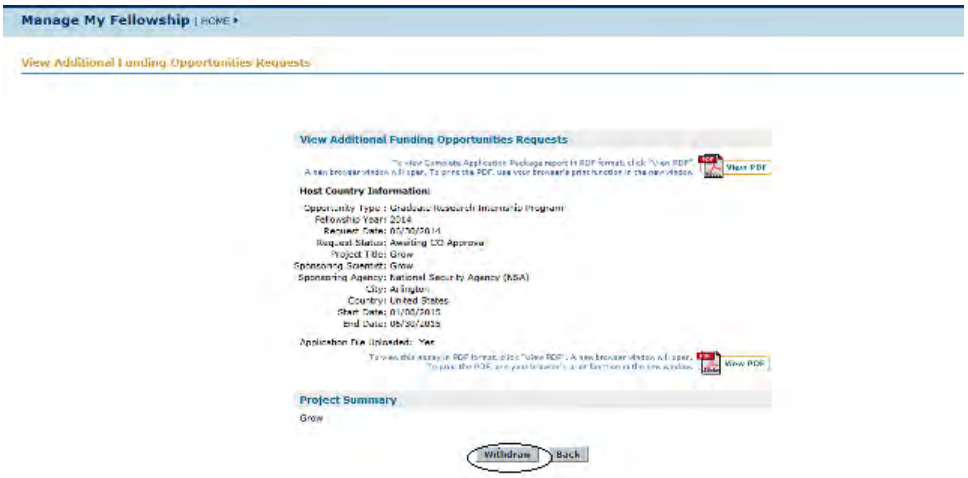
To submit an additional Funding Opportunity Request:

1. Click the **View Submitted Additional Funding Opportunities Request** link from your Fellows Optional Task List



2. View the record of the application to be withdrawn

3. Select the Withdraw button and select Yes on the confirmation page.



Note: The application is withdrawn and an auto generated email will be sent to the CO advising them of the transaction.

Note: Once an application is withdrawn it is deleted from the system.

Submitting Activities Reports

Submitting Activities Reports

Each year of your fellowship, you are required to submit an activities report. The **Submit Prior Fellowship Year Activities Report** link will be available in your Fellows Task List until you have submitted your report for the year. It is important to note that you are required to submit an activity report for the prior tenure period before you attempt to submit your tenure declaration for the upcoming fellowship year. If the submission period to submit activity reports has passed, and you have not yet submitted your activities report, you must do so by clicking the **View or Amend Submitted Activities Reports/Add Activities Report for Previous Fellowship Year** link and choosing the option to add a report for the previous year.

The Activity Report is a ten step process. The application will guide you through each step you need to complete in order to submit your activities report. As you complete the steps, you have the ability to navigate within the different sections you have completed. You may do this by clicking on the title header of each section.

Submitting An Activity Report

To Submit an Activities Report:

1. Click the **Submit Prior Fellowship Year Activities Report** link from your Fellows Task List.

The Background Information screen is displayed as seen below. You are required to enter your background information for each year.

2. Enter your Background Information in the fields provided.

a. All required fields for the form are marked with an asterisk.

Figure 62: Background Information screen

3. Click the **Save and Continue** button. The skills screen is displayed as seen below:

2 Skills

* Required Field

Research Skills

***Complete the following information about skills you have acquired this year that support your research such as lab work, field work, research methodology etc.**
(select one or more items)

- [ ] I was NOT engaged in the activities listed below during this reporting period.
- [x] Participated in formal coursework/training in research methods, practices, and/or instrumentation in your primary discipline.
- [ ] Engaged in practical, hands-on laboratory and/or field experience in conducting research.
- [ ] Undertook additional formal coursework/training.
- [ ] Participated in formal coursework/training in both the ethical and responsible conduct of research and ethical conduct related to the themes encompassed by your project (e.g., human subjects and animal use and care, radiation safety training, hazardous materials, etc.).
- [ ] Other preparation to conduct research (e.g. short course)

Please Specify *(255 char. max)*

*How many courses/seminars did you take in your major discipline during this reporting period?

2

*How many courses/seminars did you take in disciplines outside of your major discipline?

2

Professional Skills

***Complete the information below about skills you have acquired this year that relate to the professional dissemination of your research results such as publications, presentations, etc.**
(select one or more items)

- [x] I was NOT engaged in the activities listed below during this reporting period.
- [ ] Authored, submitted or published research paper(s) in refereed journals.
- [ ] Made presentation(s) at academic/scientific professional conferences, meetings, or departmental seminars.
- [ ] Presented results from GRF activities to professional, nonacademic audiences (e.g., industry, government)
- [ ] Produced multimedia materials, web sites, or other cyber-enabled tools to communicate the results of GRF activities to external audiences.
- [ ] Participated as a member of teams engaged in joint research, education, and/or outreach efforts.
- [ ] Led teams engaged in research, education, and/or outreach efforts.

Preparation for Career

***Complete the information below about skills you have acquired this year that will help prepare you for your career after leaving graduate school.**
(select one or more items)

- [x] I was NOT engaged in the activities listed below during this reporting period.
- [ ] Received training or instruction (e.g., courses, workshops) in effective teaching practices and student mentoring.
- [ ] Developed and presented course and/or curriculum materials.
- [ ] Served as a mentor to others (e.g., graduate students, undergraduates, laboratory technicians)
- [ ] Received training/mentoring in grant proposal preparation.
- [ ] Authored/coauthored and submitted grant proposals.
- [ ] Received training/instruction on the interaction between academic research and industrial technical requirements.
- [ ] Received training/instruction for applying your research to address public policy concerns or issues.
- [ ] Had an internship (an off-campus, research, educational, and/or work experience) in a nonacademic setting (e.g., industry, government)
- [ ] Had professional interactions other than internships with nonacademic employers (e.g. industry, government) in order to learn about career opportunities and requirements.
- [ ] Other preparation for careers in academia - please specify.

(255 char. max)

- [ ] Other preparation for nonacademic careers (e.g., industry, government) - please specify.

(255 char. max)

Save and Continue | Cancel

Figure 63: Skills screen

4. Enter your Research skills, Professional Skills, Preparation for Career for the given year.

   a. For each of the sections if “I was NOT engaged in the activities listed below during this reporting period” is selected, none of the other boxes in that particular section can be selected

   b. All required fields for the form are marked with an asterisk

5. Click the**Save and Continue** button. The International Experience Screen is displayed as seen below:

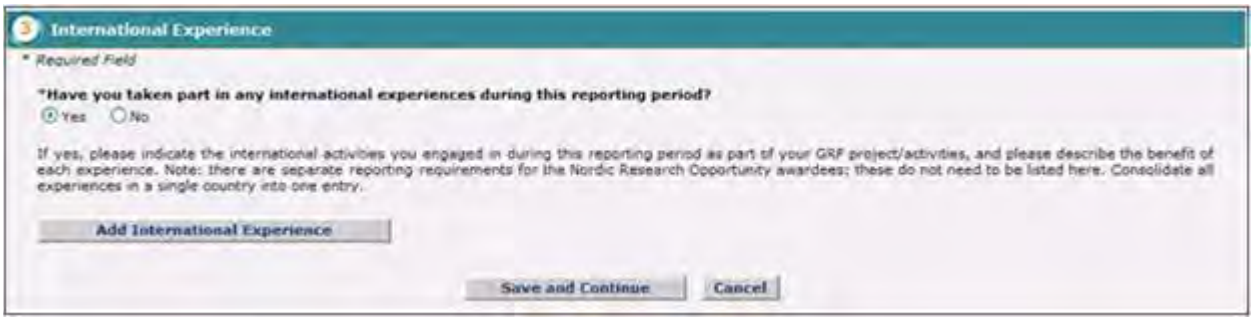


Figure 64: International Experience screen

6. Select "Yes" or "No" to indicate whether or not you have taken part in any international experiences during the reporting period.

7. If "No" is selected, select the Save and Continue button
   If "Yes", is selected, select "Add International Experience" to enter your International Experiences. The Add International Experience screen will display as seen below:

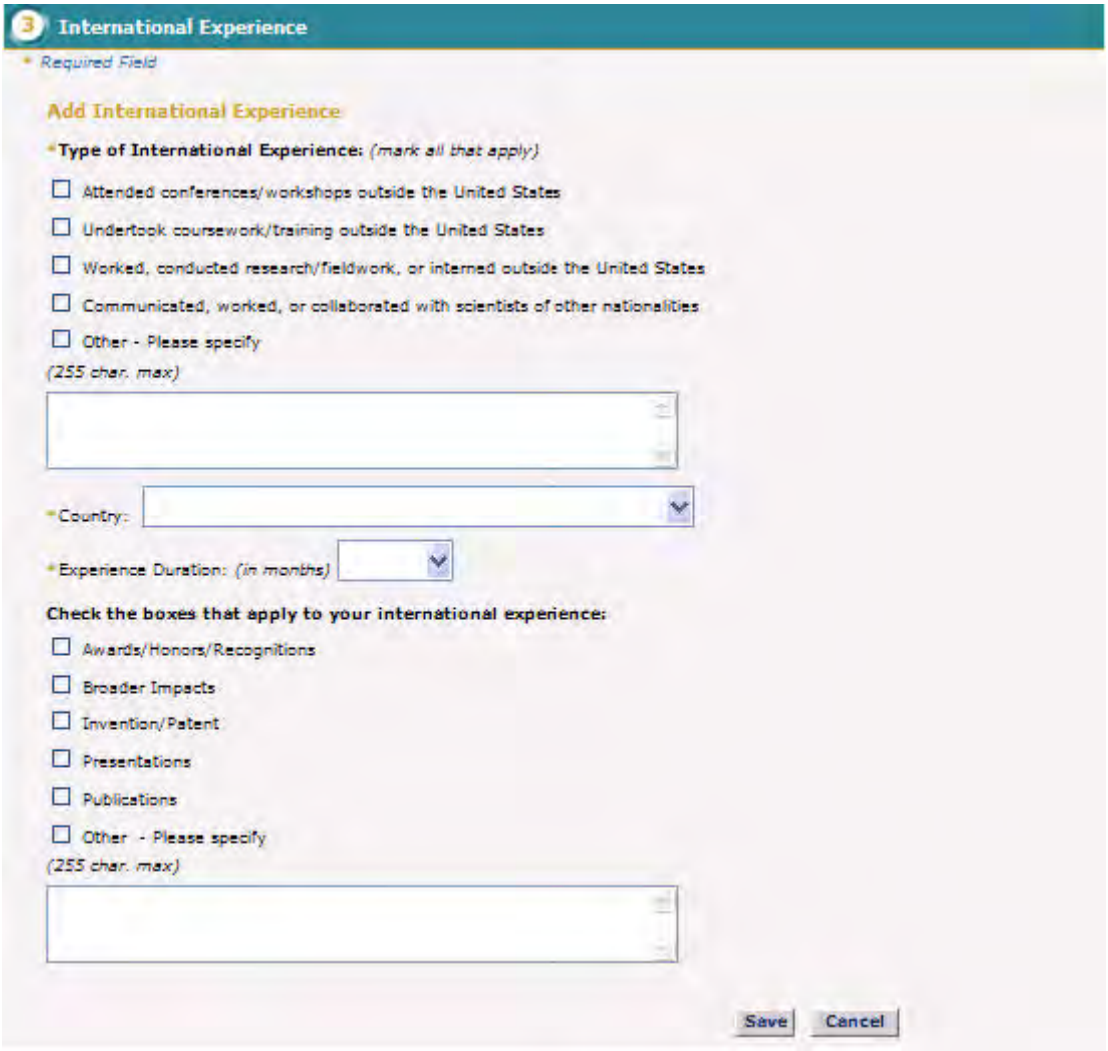


Figure 65: Add New International Experience screen

8. Enter your International Experience for the given year.

    a. Select the Type of International Experience (check all that are relevant)

    b. Enter the Country in which the Experience took place

    c. Enter the duration of the International Experience (for example if the duration is 2 months, enter 1-2)

    d. Check all of the achievements that are associated with your International Experience

    e. Click **Save** button to navigate to Achievements screen

To Edit an International Experience:

a. Select the **Edit** link next to the International Experience you wish to update.

Figure 66: Edit International Experience Link

The International Experience is displayed with the ability to make changes to the information you previously entered.

a. Enter the changes you wish to make.

b. Click the Save button.

The updated experience is displayed on the International Experience page.

To Delete an International Experience:

Figure 67: Delete International Experience screen

a. Select the Delete link next to the International Experience you wish to remove.

b. Select "Yes" when asked if you are sure you wish to delete the International Experience.

The International Experience is removed from your list.

9. Click the **Save and Continue** button.

The Achievements screen is displayed.

10. Select "Yes" or "No" to indicate whether or not you have any Achievements to report for the reporting period.

11. If "No" is selected, select the Save and Continue button to advance to the next step.

12. If "Yes", select an Achievement type and select "Add Achievement" to enter your Achievement. The Add Achievement screen is displayed

Figure 68: Achievements screen

a. Enter the Achievement in the text box per the instructions provided

b. Select the Save button

c. The Achievements screen will display with the entered Achievement in the Achievements table

d. Select the Save button to navigate to the next screen Career Plans

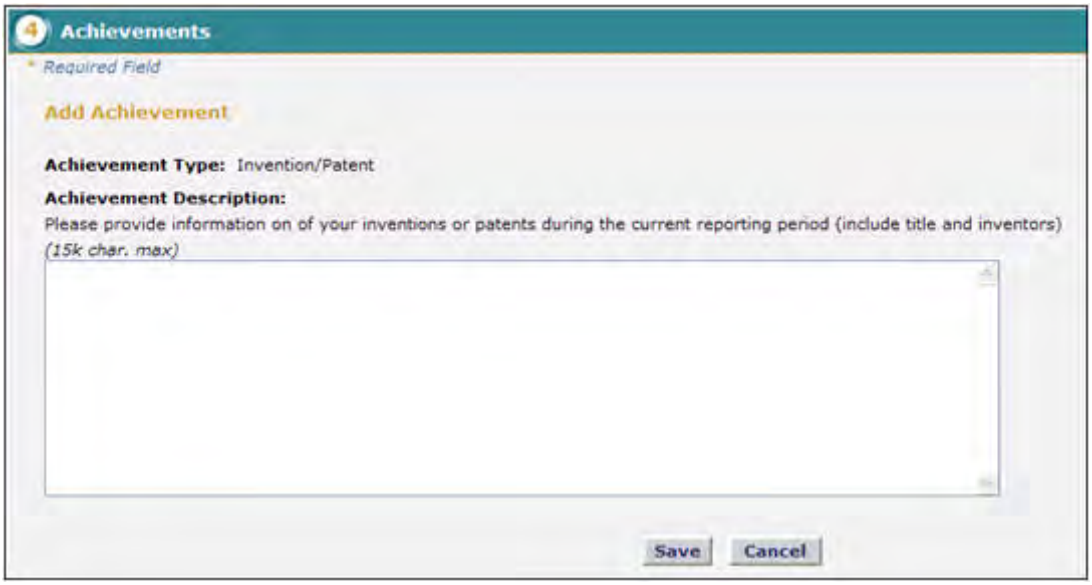


Figure 69: Add Achievements Screen

To View an Achievement:

a. Select the View link next to the Achievement you wish to view.

Figure 70: View Achievements Link

The achievement is displayed with the ability to make changes to the information you previously entered.

b. Enter the changes you wish to make.

c. Click the Save and Continue button.

The updated achievement is displayed on the Achievements page.

To Edit an Achievement:

a. Select the **Edit** link next to the Achievement you wish to update.

Figure 71: Edit Achievement Link

The achievement is displayed with the ability to make changes to the information you previously entered.

a. Enter the changes you wish to make.

b. Click the Save button.

The updated achievement is displayed on the Achievements page.

To Delete an Achievement:

a. Select the Delete link next to the achievement you wish to remove.

b. Select "Yes" when asked if you are sure you wish to delete the Achievement.

c. The achievement is deleted from your achievements list.

Figure 72: Delete Achievement Link

d. The Career Plans screen is displayed

Enter your updated Career Plans.

a. Enter your Expected Graduation Date

b. Select your primary choice for the type of employment you are pursuing

c. Click Save & Continue button to navigate to Internships screen. The Internships screen is displayed

Figure 73: Career Plans Screen

Check ‘Yes’ or 'No' to indicate whether you “Have you taken part in any internship(s) lasting 1 month or more with industries or businesses, government laboratories or agencies, or nonprofit organizations during this reporting period?” and select ‘Add Internship’ button to add Internship. It will expose new content as shown in the below screen

e. If ‘No’ is selected, select the Save and Continue button to advance to the next step.

f. If "Yes", select "Add Internship" to enter your Internships.

Figure 74 : Internship screen

To Add to Internships:

a. Enter the Company/Agency/Organization

b. Enter the duration of the Internship (for example if the duration is 2 months, enter 1-2)

c. Select the relevant Internship Contributions

d. Click Save button

The Internships screen will be displayed with the entered Internship displayed

g. Select the Save and Continue button to navigate to the next step

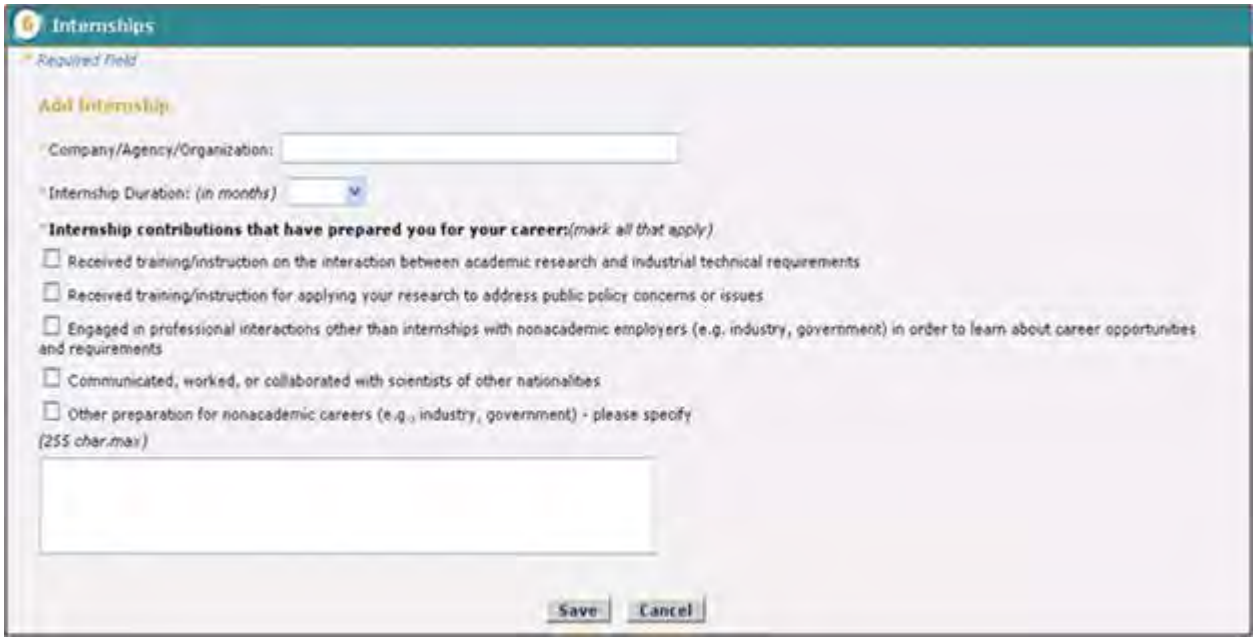


Figure 75: Add Internship Screen

To Edit Internships:

a. Select the Edit link next to the Internship you wish to update

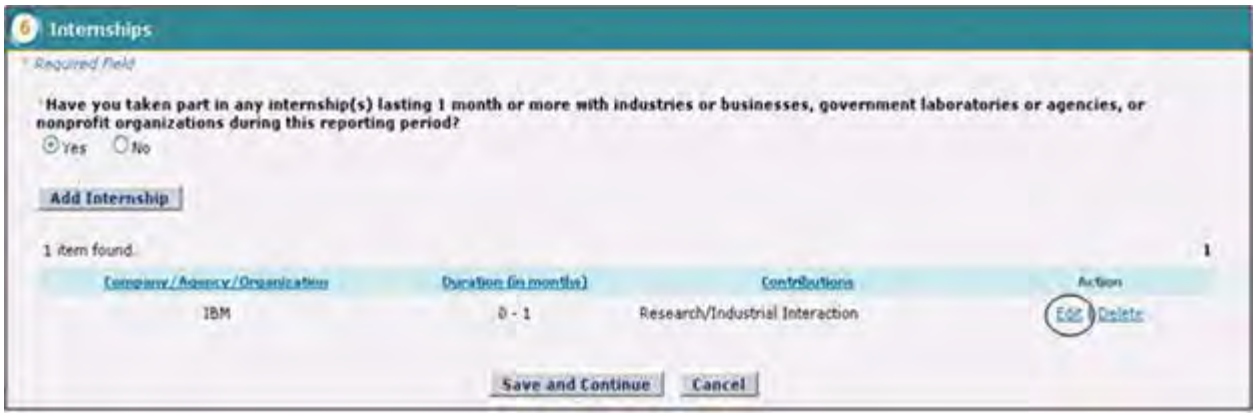


Figure 76: Edit Internships Link

The Internships is displayed with the ability to make changes to the information you previously entered.

b. Enter the changes you wish to make.

c. Click the Save button.

The updated internship is displayed

To Delete an Internship:

a. Select the Delete link next to the Internship you wish to remove.

b. Select 'yes' when asked if you are sure you wish to delete the Internship

c. The Internship is removed from your Internship list.

d. Click the Save and Continue button. The Other Financial Support page is displayed

Figure 77: Delete Internship Link

The Other Financial Support Screen is displayed

13. Select 'Yes' or 'No' to indicate if you have received any fellowships (other than GRFP), scholarships or grants during the reporting period.

14. If 'No' is selected, select the Save and Continue button to proceed to the next step.

15. If ‘Yes’ is selected, select "Add Fellowship" to enter your Fellowships

16. The Add Fellowship Screen is displayed:

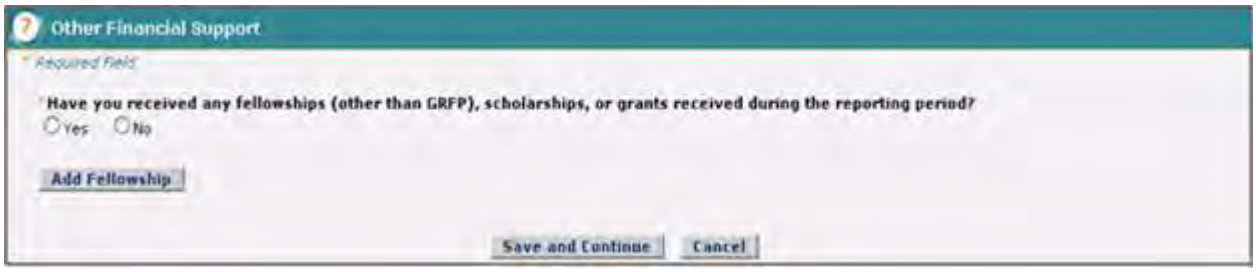


Figure 78: Other Financial Support screen

To Add a Fellowship:

a. Enter the short title of the Fellowship, Scholarship or Assistantship

b. Enter the year awarded

c. Enter the Source of Support

d. Click **Save** button to navigate to Stipend Feedback screen

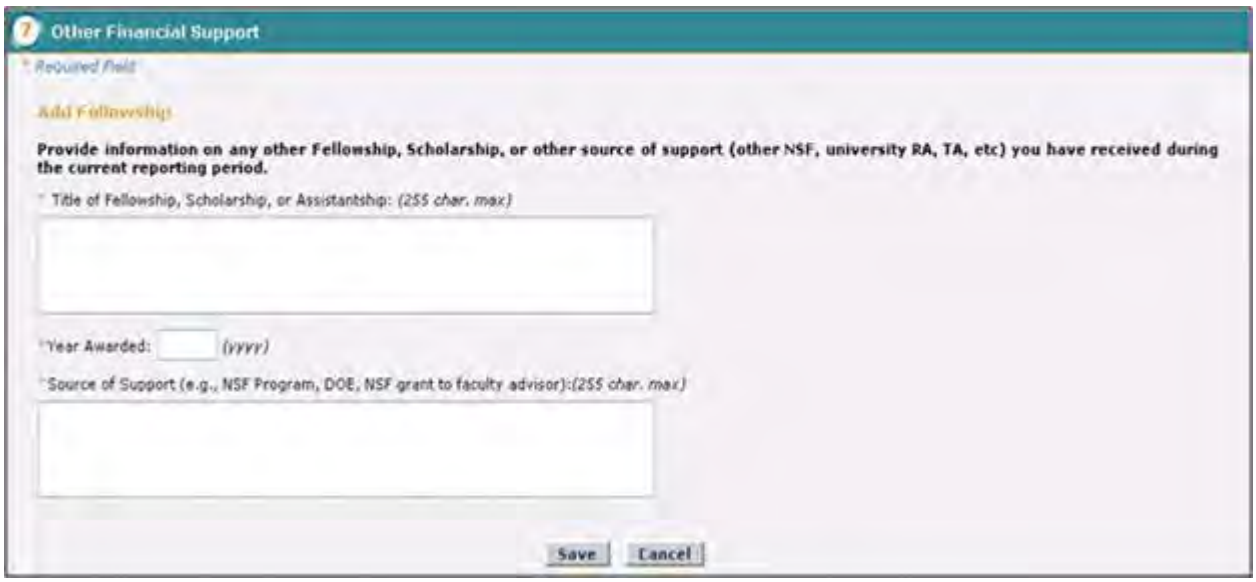


Figure 79: Add Fellowship screen

To Edit Fellowships:

a. Select the **Edit** link next to the Fellowship you wish to update

Figure 80: Edit Other Financial Support Link

The Other Financial Support is displayed with the ability to make changes to the information you previously entered.

a. Enter the changes you wish to make.

b. Click the Save button.

The Other Financial Support screen is displayed with the updated entry

To Delete a Fellowship:

a. Select the **Delete** link next to the Fellowship you wish to remove.

b. Select 'yes' when asked if you are sure you wish to delete the Fellowship.

c. The Internship is removed from your Fellowship list.

d. Click the Save and Continue button.

Figure 81: Delete Other Financial Support Link

e. The Stipend Feedback page is displayed as seen below.

f. Enter Stipend Feedback for the given year by entering all of the required information.

g. Click Save & Continue button to navigate to next screen Additional Funding Opportunities

Figure 82: Stipend Feedback Screen

To add Additional Funding Opportunities:

1. Answer Yes to the question: Did you receive any NSF GRFP Additional Funding Opportunities during this reporting period?
2. Click the Add Additional Funding Opportunity button
3. Select the Additional Funding Opportunity type from the drop down list
4. Click the Continue button
5. Browse and upload an associated document (if needed). Proofread and accept document
6. Click the Save and Continue button to navigate to the next screen Fellowship Year Summary

Figure 83: Additional Funding Opportunity

Figure 84: Select Additional Funding Opportunity

Figure 85: Upload Additional Funding Opportunity Files

Figure 86: Proofread PDF

Figure 87: Accept PDF

Figure 88: Save and Continue

The Fellowship Summary screen is displayed as shown below.

h. Enter Fellowship Summary for the given year. To enter a Fellowship Summary you may either:

a. Enter the text in the required field; or Upload a **1 page** document which will be converted to **PDF**

To Upload a document for the Activity Report

a. Click the **Upload** button to begin the upload process.

The PDF Conversion/Compliance Check screen is displayed. Please be patient, this process may take a few minutes. Every 15 seconds this page will refresh to check the status of your file.

During the upload process, your file is converted to a PDF. After successful conversion, the File is Ready for Proofreading screen is displayed.

b. Proof-read the converted PDF file. Click the **Proofread PDF** button to proofread the converted file.

A new window is opened to display the PDF file. Pay special attention to check that all figures, graphics, tables, margins, page breaks, and other special formatting options have been accurately preserved.

The Proofreading Complete screen is displayed.

c. Click the **Accept** button to accept the converted PDF file (However, if you detected any problems in the PDF file, you can cancel the upload by clicking on the **Cancel** button. You may then correct the errors and resubmit the corrected version of your document.)

The prior screen, from which the upload was initiated, is displayed and a **View PDF** link is now displayed on the screen for your uploaded document- (if the Accept button was clicked in step c).

NOTE: The uploaded Fellowship Summary should not exceed 1 page in length

d. Click Save & Continue button to navigate to Submit Screen

Figure 89: Fellowship Year Summary

The Submit Report screen is displayed. At this time, you may submit your report or you may save the information and submit the report at a later date.

i. Review your report and select Edit to return to any screen that you wish to edit.

j. To submit your report to NSF, click the Submit button.

Viewing or Amending a Submitted Activities Reports

The **View or Amend Submitted Activities Reports/** task allows you to view and append information to any of your activities reports that are in a submitted state. This task permits you to view a selected submitted activities report or to add further information, via a free text area, after submission. A time and date stamp will also be included with the appended text. This task also allows you to submit an activities report for a previous year for which you have not yet submitted a report. This link is not displayed if your Fellowship Status is awardee or declined.

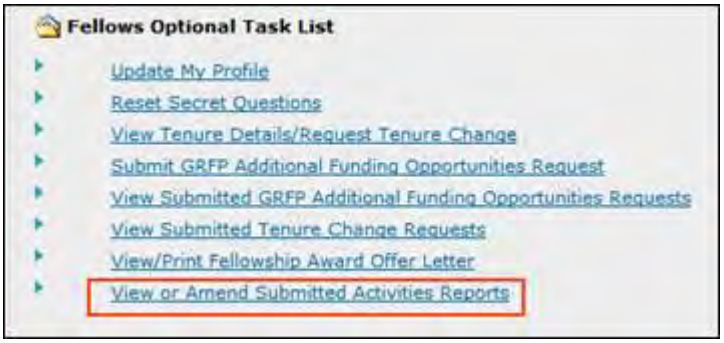


Figure 90: View or Amend Submitted Activities Reports Year

To view or amend a previously submitted activities report or add an activities report for a previous year:

1. Click the **View or Amend Submitted Activities Reports/** link.

A list of years in which activities reports are required due to your Fellowship Status during that year are displayed. Any previously submitted activities reports are displayed with a link to either view or amend the report. Any activities reports that have not yet been submitted are displayed with a link to add the report.

Figure 91: View or Amend Submitted Activities Reports Screen

If you wish to view a submitted activities report:

2. Click the **View** link for the appropriate fellowship year.

If you wish to amend a submitted activities report:

3. Click the **Amend** link for the appropriate fellowship year.

A free text area is displayed for additional information to be entered.

Figure 92: View/Amend Submitted Activities Reports

4. Enter additional information and click the **Submit** button.

Any additional information entered and submitted will be displayed on the activities report screen under the Additional Information heading. It will also be displayed on the Amend activities report screen under the Existing Additional Information heading. All additional information will be appended to the previously added information along with a date and time stamp.

Using Fellow Abroad Functions

Using Fellow Abroad Functions

A Fellow Abroad is classified as a fellow who associated with a foreign organization for a given academic year. You can access your Fellow Abroad tasks once your tenure plan to continue your fellowship at a university that is located outside the United States has been approved. The Fellows Abroad Task List includes the following tasks: Prepare Fellows Abroad Information, Check Status of Fellows Abroad Information, View Fellows Abroad Information, and View/Submit Fellows Abroad Travel Certificate.

Figure 93: Fellows Abroad Task List

It is important to note that Fellows Abroad do not have Coordinating Officials at their organizations so there are additional tasks fellows abroad must perform in order to manage their fellowship. These include submitting a starting certificate, submitting a termination certificate, and submitting a payment enrollment form. The instructions for how and when to complete each form/document are listed in the sections below.

Preparing Fellows Abroad Information

The Preparing Fellows Abroad Information link provides you the ability to submit the required Starting Certificate, Payment Enrollment Form and Termination Certificate.
To access the Starting Certificate, Payment Enrollment Form and Termination Certificate, do the following:

1. Click on the **Prepare Fellows Abroad Information** link.

Figure 94: Prepare Fellows Abroad Information Link

The Prepare Fellows Abroad Information screen will appear and display the following screen:

Figure 95: Prepare Fellows Abroad Information Main

Submitting a Starting Certificate

A starting certificate must be submitted at the beginning of each fellowship year when you are a fellow abroad. Your starting certificate information must be verified and approved by your universities bursars office so that financial disbursements can provided to you. If you provide a valid email address to contact the bursars office, an email will automatically be sent to this address with your starting certificate details asking for a response from the bursars office. If an email address is not provided, you will be responsible for contacting the bursars office, and having them contact the National Science Foundation to verify your enrollment and start date. Once your Starting Certificate is submitted, your Fellows Abroad Address will be displayed in the Fellow Data section on the Fellow homepage. NSF uses both the abroad and domestic email addresses listed in your Fellow Data section to contact you while you are abroad.
The Starting Certificate includes the following information fields:

Field Name	Description
Starting Semester	You can choose from a Fall or Summer Start, which indicates the semester you are planning on starting your semester abroad. Starting Semester is a required field.
Start Date	The Start Date is the date that you will start the academic year at the Abroad College/University. This date will need to be confirmed by the Bursars Office at your Abroad University through an "Enrollment Verification". You can enter the date manually (MM/DD/YYYY) or use the calendar to find your start date. The Start Date is a required field.
Anticipated Tenure End Date	The Anticipated Tenure End Date is the date that you will complete coursework for the current academic year abroad. You can enter the date manually (MM/DD/YYYY) or use the calendar to find your anticipated tenure end date. The Anticipated Tenure End Date is a required field.

Institutional Address of Fellow	The Institutional Address of Fellow is your address abroad. The Institutional Address of Fellow is a required filed.
Institutional City	The Institutional City is the city where your Institution is located. The Institutional City is a required field.
Institutional Country	The Institutional Country is the country where your Institution is located. The Institutional Country is a required field.
Institutional Postal Code	The Institutional Postal Code is the postal code that your Institution uses. The Institutional Postal Code is a required field.
E-Mail Address	The E-Mail Address is the E-Mail Address that you will be using while your abroad. The E-Mail Address is a required field.
Home Phone Number Abroad	The Home Phone Number Abroad is the phone number that you will be using while your abroad. The Home Phone Number Abroad is a required field.
Work Phone Number Abroad	The Work Phone Number is the phone number of your work place when your abroad. The Work Phone Number is not a required field.
Fax Number Abroad	The Fax Number Abroad is the fax number that you use or have access to while your abroad. The Fax Number Abroad is not a required field.
Bursars Office Contact: First Name	The Bursars Office Contact First Name is the First Name of the Bursars Office Contact. The Bursars Office Contact First Name is a required field.
Bursars Office Contact: Last Name	The Bursars Office Contact Last Name is the Last Name of the Bursars Office Contact. The Bursars Office Contact Last Name is a required field.
Bursars Office Title	The Title is the title of the Bursars Office Contact. The Title is a required field.
Bursars Office Email Address	The Bursars Office Email Address is the email address where the bursars office contact can be reached. The Bursars Office Email Address is not a required field, but providing an email address can reduce the amount of time it takes in order to receive your first disbursement of funds.
Bursars Office Address	The Bursars Office Address is the address where the bursars office contact can be reached. The Bursars Office Address is a required field.

Bursars Office City	The Bursars Office City is the city where the Bursars Office is located. The Bursars Office City is a required field.
Bursars Office Country	The Bursars Office Country is the city where the Bursars Office is located. The Bursars Office Country is a required field.
Bursars Office Postal Code	The Bursars Office Postal Code is where the Bursars Office is located. The Bursars Office Postal Code is a required field.
Bursars Office Phone Number	The Bursars Office Phone Number is the phone number where the Bursars Office can be reached. The Bursars Office Phone Number is a required field.
Scientific Advisor First Name	The Scientific Advisor First Name is the First Name of the Scientific Advisor. The Scientific Advisor First Name is a required field.
Scientific Advisor Last Name	The Scientific Advisor Last Name is the Last Name of the Scientific Advisor. The Scientific Advisor Last Name is a required field.
Scientific Advisor Title	The Title is the title of the Scientific Advisor. The Title is a required field.
Scientific Advisor Email Address	The Scientific Advisor Email Address is the email address where the Scientific Advisor can be reached. The Scientific Advisor Email Address is a required field.
Scientific Advisor Telephone Number	The Scientific Advisor Phone Number is the phone number where the Scientific Advisor can be reached. The Scientific Advisor Phone Number is a required field.
Scientific Advisor Department	The Scientific Advisor Department is the department that the Scientific Advisor is associated to. The Scientific Advisor Department is a required field.

To Submit a Starting Certificate:

1. Select the **View/Submit Starting Certificate** link from your Prepare Fellows Abroad Information Task List.

The Submit Starting Certificate screen is displayed.

Figure 96: Starting Certificate Link

2. Enter Start Date Information.

Figure 97: Start Date

3. Enter End Date Information.

Figure 98: End Date Information

4. Enter Fellow Abroad Contact Information.

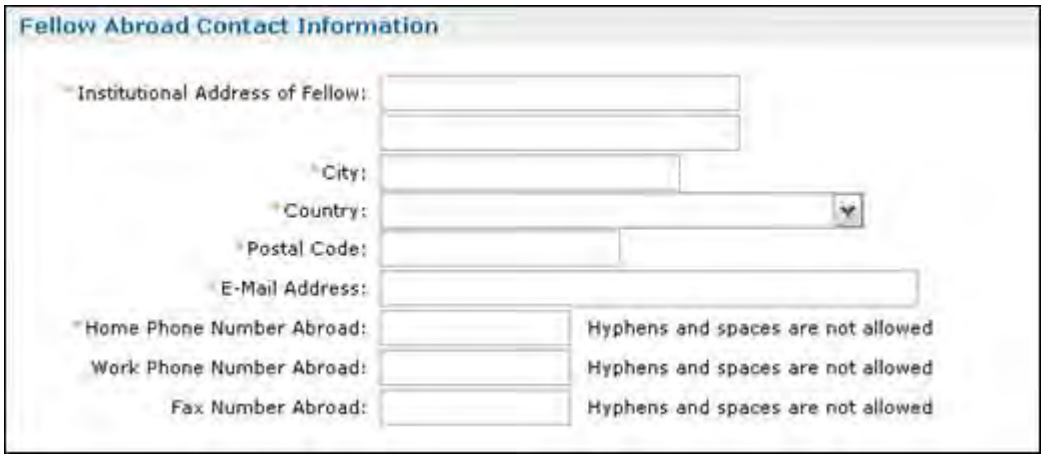


Figure 99: Fellow Abroad Contact Information

5. Enter Bursars Office Information.

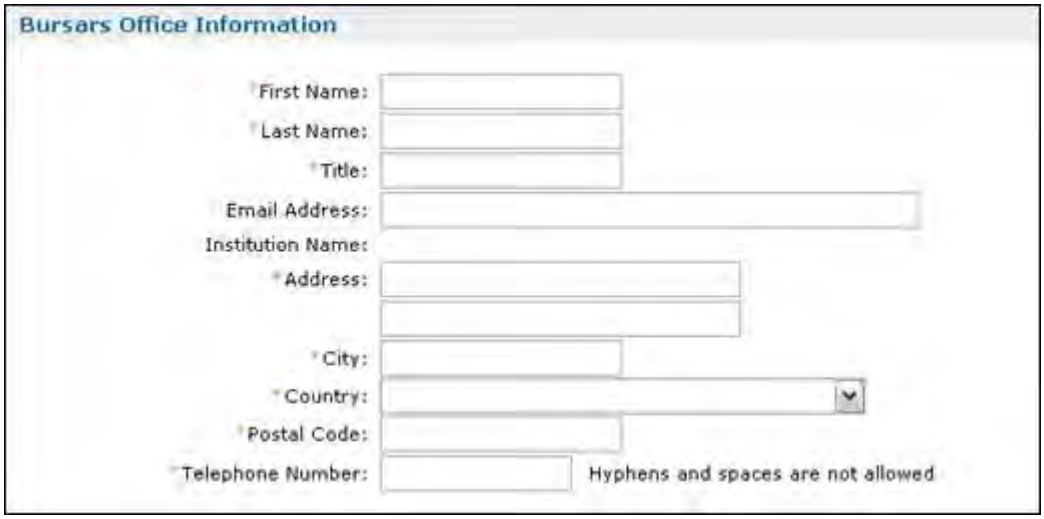


Figure 100: Bursars Office Information

6. Enter Scientific Advisors Information and Press Save & Submit.

Figure 101: Scientific Advisor Information

Once you have submitted your starting certificate, a confirmation screen is displayed. You may select the **Fellows Home Page** link to return to your home page and task list. Your Starting Certificate information will then be forwarded to your bursars office for approval if an email address was provided. It is encouraged for you to provide an email address as quick response from your Bursars Office could reduce the amount of time it takes in order to receive your first disbursement.

To edit a submitted Starting Certificate for the current year, click on the **View / Submit Starting Certificate** link available in your Prepare Fellows Abroad Information task list again. Your last submitted Starting Certificate for the current year will be displayed. You may then click the edit button to change the information on the form and resubmit the Starting Certificate. Once your bursars office has verified your Starting Certificate information, you will be unable to change the bursars office contact information.

Submitting a Payment Enrollment Form

A payment enrollment form must be submitted once you become a fellow abroad in order for NSF to issue your stipend and other costs directly to you. Once you have accepted your award and indicated a foreign organization or declared your tenure plans for the next year

and indicated a foreign organization, you will be able to submit a Payment Enrollment form through the Prepare Fellows Abroad Information link. You are responsible for verifying and submitting your own Payment Enrollment form, which is done using an E-Signature. Once you submit the payment enrollment form, it will be forwarded to the NSF for processing. After the form has been processed, you will receive a confirmation email from NSF. You are only required to submit a payment enrollment certificate for the first year that you are abroad. For each successive year, it is important for you to verify that the payment enrollment form details are correct.

To Submit a Payment Enrollment Form:

1. Select the **View/Submit Payment Enrollment** link from your Prepare Fellows Abroad Information Task List.

Figure 102: View/Submit Payment Enrollment Form

The payment enrollment form is displayed. The required fields on the form are indicated with an asterisk.

2. Enter your Social Security Number Information (SSN) in the Social Security Number section. It is important to note that as you enter in your SSN into the fields provided, that your SSN will appear in the form of asterisks (*) for security purposes. You are only able to enter your SSN into the Payment Enrollment form once. Once it's entered and saved, you will be unable to edit your SSN. If you return to the Payment Enrollment Form screen after you have saved your SSN information, your SSN will appear in the form of asterisks (*) for security purposes.

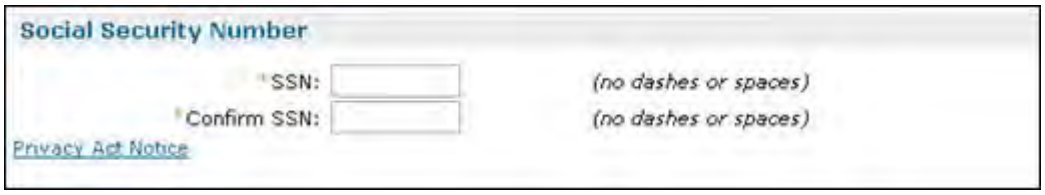


Figure 103: Social Security Number Information

3. Enter your banking organization information in the Financial Institution section.

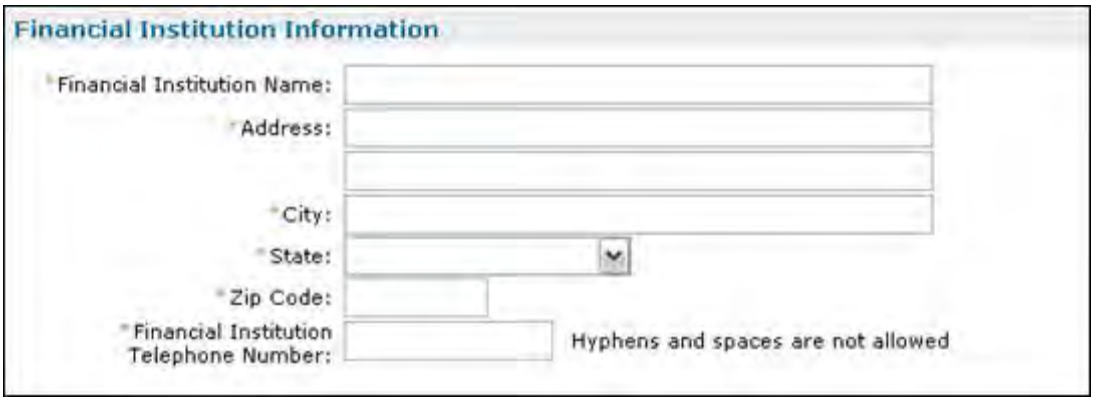


Figure 104: Financial Institution Information

4. Enter your specific account information in the Account Information section, including the name on the account, the type of account (i.e. checking, savings, etc.), the account number, and the routing number.

Figure 105: Bank Account Information Section of the Payment Enrollment Form

5. Enter your ACH Coordinator Information, if available. If you do not know this information, enter your name or the name of the person that assisted you in setting up this account.

Figure 106: ACH Coordinator Information

6. Click the **Save & Submit** button.

A verification screen is displayed for you to verify that all information was correctly entered. You may go back and edit incorrect information, or continue submitting the form.

Financial Institution Information

Financial Institution Name: Test Bank
Address: Testing Road
City: Testing
State: TN
Zip: 22204
Financial Institution Phone Number: 5555555555

Account Information

Account Name: Test account
Account Type: checking
Depositor Account Title:
Depositor Account Number: 123456789
Lockbox Number:
Nine (9) Digit Routing Number: 123456789

ACH Coordinator Information

First Name:
Last Name:
E-Mail Address:
Telephone Number:

Update Information

Last Updated By: htest40
Last Updated On:

Privacy Act

The above information is provided to comply with the Privacy Act of 1974 (P.L. 93-579). All information collected on this form is required under the provisions of 31U.S.C. 3322 and 31 CFR 210. This information will be used by the Treasury Department to transmit payment data, by electronic means to individuals financial institution. **Failure to provide the requested information may delay or prevent the receipt of payments through the Automated Clearing House Payment System.**

Certifications

There are two certifications which must be made before the National Science Foundation can authorize funds:

☐ I hereby certify as to the accuracy of the information contained herein, and I understand that if this information is incorrect, payment could be delayed by a period of 30 to 90 days.

☐ By electronically signing this request, I am certifying that I have carefully read the Privacy Act Statement above.

Submit Back

Figure 107: Confirm Payment Enrollment Screen

7. Read the Privacy Act all Certifications carefully and **check the boxes next to each certification**. By checking each certification, you are certifying that statements made therein are true and complete to the best of your knowledge; and agreeing to accept the terms of the Privacy Act.

8. Press the **Submit** button to submit your Payment Enrollment Form.

Once you have agreed that the information is correct, a confirmation screen is displayed indicating that you have successfully submitted a payment enrollment form. You may select the Fellow Home Page link to return to your home page and task list. Your payment enrollment information will then be forwarded to NSF for processing. After the form has been processed, you will receive a confirmation email from NSF. If you need to update your payment enrollment information, you may use the **View/Submit Payment Enrollment Form** link that is available in your Prepare Fellows Abroad Information task list. Once you have submitted your payment enrollment certificate, the link allows you to view the information you last submitted on the payment enrollment form. To make changes to this information, click the Edit button.

Submitting an Termination Certificate

The Termination Certificate must be submitted at the completion of each fellowship year when you are a fellow abroad. A Starting Certificate for the current abroad year must be submitted before you can submit a Termination Certificate for that year. You are responsible for verifying and submitting your own termination certificate, which is done using an E-Signature. A Termination Certificate should be submitted no more than 30 days prior to completing coursework for the academic year abroad. It is important to note that once your Termination Certificate has been submitted, your mailing contact information in your Profile will be updated with the mailing address and email address entered on the Termination Certificate. NSF uses information stored in your Profile for contacting you during your fellowship.

To Submit a Termination Certificate:

1. Select the **View/Submit Termination Certificate** link from your Prepare Fellows Abroad Information Task List.

The Submit Termination Certificate screen is displayed.

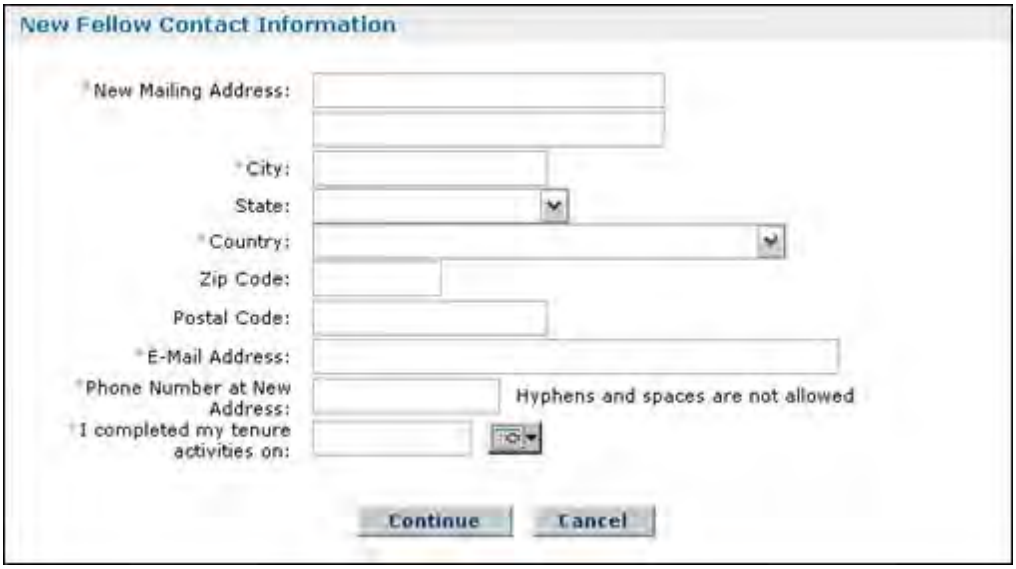


Figure 108: Termination Certificate Screen

2. Enter your New Fellow Contact Information and enter your completed tenure activity date by using the calendar icons or manually entering in the date. A calendar is displayed in a separate window and allows you to select a date.

Figure 109: Calendar Window

3. Click the **Continue** button.

The Certify Termination Certificate Screen displays a new screen with the termination certificate information you entered.

Bursars Office Abroad Information

Host Institution: Australian National University
Institution Address: test

City: test
Country: OB
Postal Code: 000000

New Fellow Contact Information

New Mailing Address: test

City: test
State: ID
Country: UG
Zip Code:
Postal Code:
E-Mail Address: test
Phone Number at New Address: 3015551212
Completed Tenure Activities: 02/28/2006

E-Signature

I, Fellow atest40, certify that the above information is correct and that I completed my tenure at this institution on the date indicated above.

By electronically signing the request, you are:

* Certifying that statements made herein are true and complete to the best of your knowledge; and

* Agreeing to accept the obligation to comply with NSF award terms and conditions if the request is granted. Willful provision of false information in this request and its supporting documents or in reports required under an ensuing award is a criminal offense (U.S. Code, Title 18, Section 1001).

Sign & Submit | Cancel

Figure 110: Certify Termination Certificate Screen

4. Press the **Sign & Submit** button to submit your Termination Certificate.

By pressing the Sign and Submit button, you are certifying that the information you provided in the Termination Certificate is correct and that you completed your tenure at that stated institution on the date you indicated. You are also certifying that the statements you made are true and complete to the best of your knowledge. You are also agreeing and willingly accept the obligation to comply with the NSF award terms and conditions.

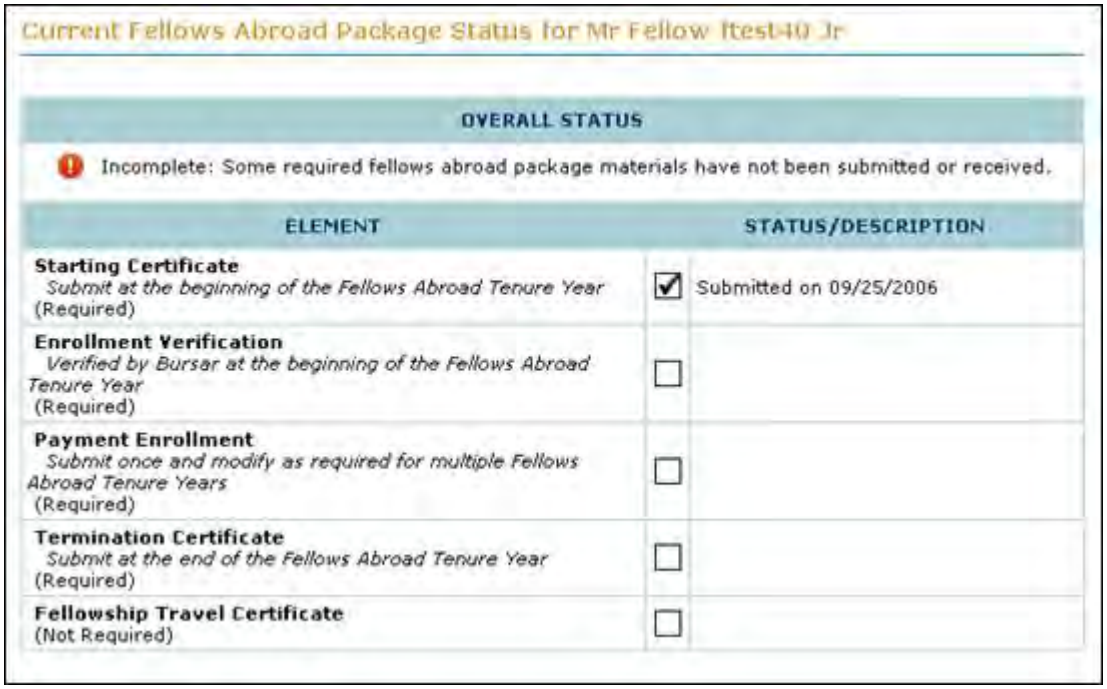
Check Status of Fellows Abroad Information

The Check Status of Fellows Abroad Information link allows you to check the status of your submitted Starting Certificate, Enrollment Verification, Payment Enrollment Form, Termination Certificate and Fellowship Travel Certificate (Not required). The Enrollment Verification is the only status element that you are not responsible for submitting. The Enrollment Verification status is updated when your institutions bursars office verifies your enrollment information by responding to the NSF. It is important to provide a bursars office email address (if possible) so that a timely response is obtained.

To Check the Status of your Fellows Abroad Information:

1. Select the **Check Status of Fellows Abroad Information** link from your Fellows Abroad Task List.

The Check Status of Fellows Abroad Information screen is displayed.


Current Fellows Abroad Package Status for Mr Fellow ftest40 Jr

OVERALL STATUS		
Incomplete: Some required fellows abroad package materials have not been submitted or received.		
ELEMENT		**STATUS/DESCRIPTION**
Starting Certificate *Submit at the beginning of the Fellows Abroad Tenure Year* (Required)	☑	Submitted on 09/25/2006
Enrollment Verification *Verified by Bursar at the beginning of the Fellows Abroad Tenure Year* (Required)	☐	
Payment Enrollment *Submit once and modify as required for multiple Fellows Abroad Tenure Years* (Required)	☐	
Termination Certificate *Submit at the end of the Fellows Abroad Tenure Year* (Required)	☐	
Fellowship Travel Certificate (Not Required)	☐	

Figure 111: Check Status of Fellows Abroad Information Screen

The overall status of your Fellows Abroad Package status will be incomplete until such time that all of the required status elements are submitted. The required elements include the Starting Certificate, Enrollment Verification, Payment Enrollment and Termination Certificate Information. The Status/Description for the various elements will be blank until such time

that your information is submitted in the system. When your certificates/forms are submitted, the Status/Description will change to “Submitted On” and the date in which the information was submitted in the system. Additionally, the check boxes located between the status elements and descriptions will no longer be empty and will appear with a check in the box also indicating that your information was submitted in the system.

View Fellows Abroad Information

The View Fellows Abroad Information link allows you to view current and previous years Fellows Abroad information. The Fellows Abroad Information includes your current and previous Starting Certificates, Payment Enrollment Information and Termination Certificates. Once you have completed your tenure abroad, the View Fellows Abroad Information link will always be available in your Fellows Abroad task list.

To view your current and previous years Fellows Abroad Information:

1. Select the **View Fellows Abroad Information** link from your Fellows Abroad Task List.

The View Fellows Abroad Information screen is displayed.

Figure 112: View Fellows Abroad Information Screen

2. Choose the Fellowship Year where you were abroad and press the **View** link.

The Fellows Abroad Information screen is displayed.

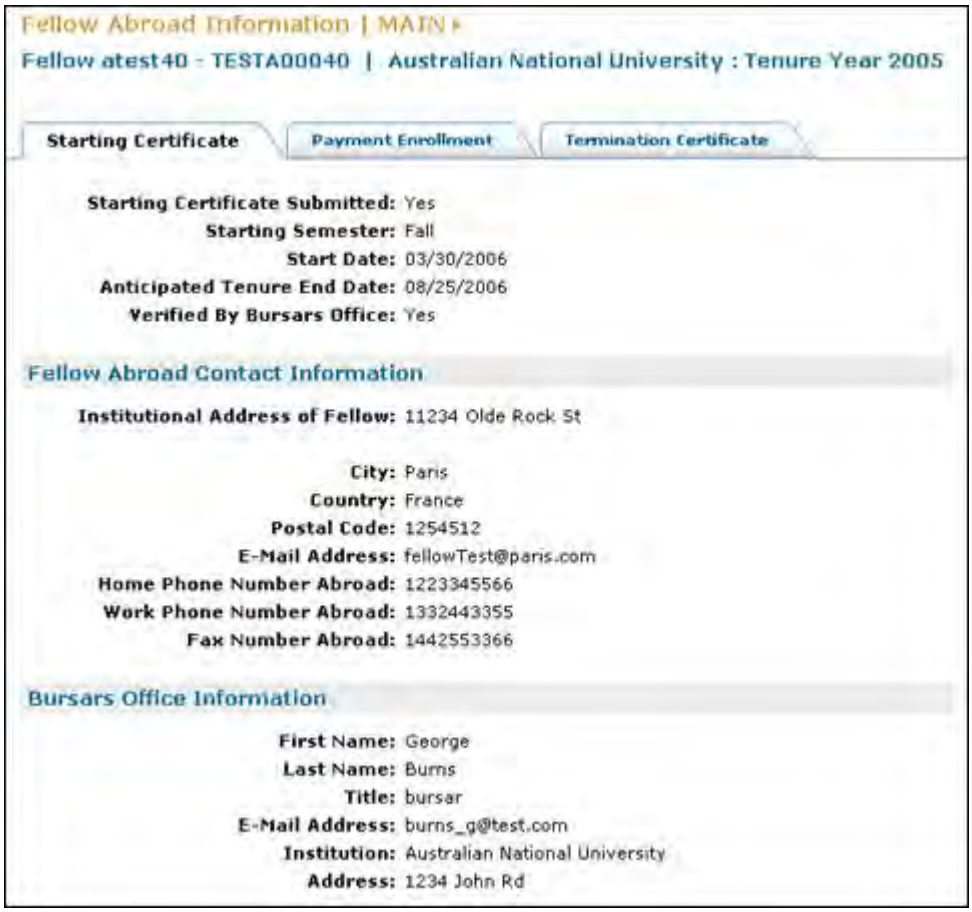


Figure 113: Fellows Abroad Information Screen

When the Fellows Abroad Information Screen is displayed, you are able to toggle between the Starting Certificate, Payment Enrollment and Termination Certificate by clicking on the tab that you wish to see.

Figure 114: Fellows Abroad Information Tabs

It is important to note that you are not able to edit any of the Fellows Abroad Information when you view this information through the View Fellows Abroad Information Link. To edit the current year Fellows Abroad information, please review the Prepare Fellows Abroad Information section above.

View/Submit Fellows Abroad Travel Certificate

The View/Submit Fellows Abroad Travel Certificate link enables you to submit a request for a one-time travel stipend to assist you while you travel to and from your abroad institution. The travel certificate is only valid if you are traveling Internationally.
To View/Submit your Fellows Abroad Travel Certificate:

1. Select the **View/Submit Fellows Abroad Travel Certificate** link from your Fellows Abroad Task List.

The View/Submit Fellows Abroad Travel Certificate screen is displayed.

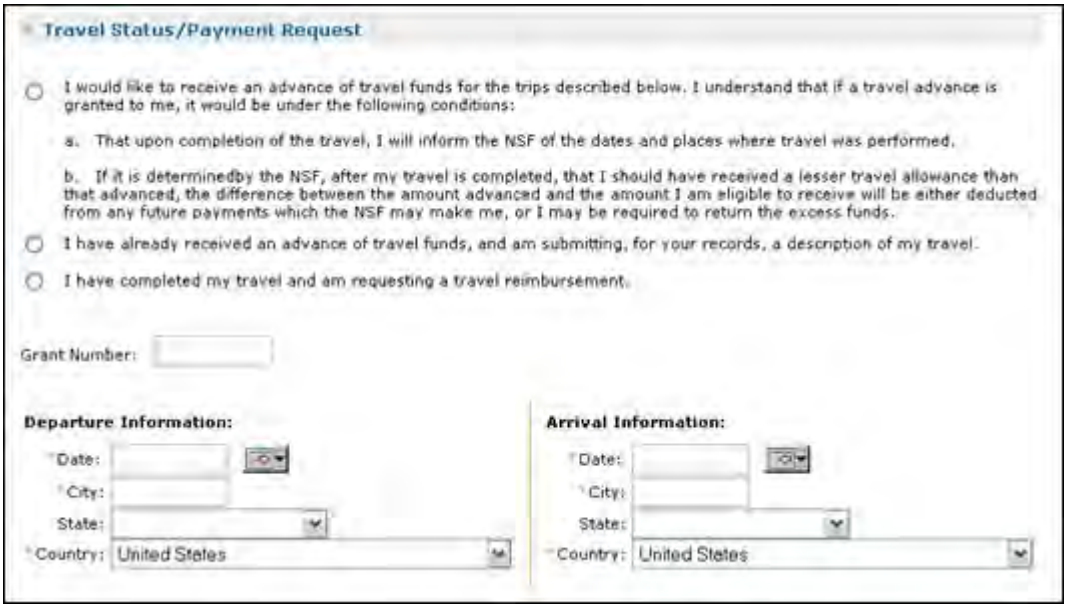


Figure 115: View/Submit Fellows Abroad Travel Certificate Screen

2. Choose **One of the three Statement choices** (required):

a. I would like to receive an advance of travel funds for the trips described below. I understand that if a travel advance is granted to me, it would be under the following conditions:

b. I have already received an advance of travel funds, and am submitting, for your records, a description of my travel.

c. I have completed my travel and am requesting a travel reimbursement.

3. Enter your Grant Number (Optional).

4. Enter your Departure and Arrival Information (Required).

5. Describe your travel plans. Specify the foreign site(s) and the dates you plan to spend in research or study there: (Must be less than 4000 characters.)

Figure 116: Travel Plans Sub-Screen

6. Press the **Sign & Submit** button to submit your Fellows Abroad Travel Certificate.

A confirmation screen is displayed indicating that you have successfully submitted your Fellows Abroad Travel Certificate. You may select the Fellow Home Page link

to return to your home page and task list. Your Fellows Abroad Travel Certificate will then be forwarded to NSF for processing. After the Travel Certificate has been processed, you will receive a confirmation emal from NSF.

Managing Your User Profile

Managing Your User Profile

Your user profile includes your name, Open Researcher and Contributor ID (ORCID), mailing contact information, and permanent contact information. Your name and mailing contact information are displayed in the Fellow Data area on the right side of your home page. If entered, the ORCID will be displayed under the name field, with a hyperlink to the ORCID registry to allow you to validate your ORCID profile. You may view or update your GRFP profile at any time using the **Update My Profile** link found in the Fellow's Optional Task List area. Changes to your profile information do not require approval by your Coordinating Official or NSF. It is important to note that if you are Abroad, you must make changes to personal profile information by submitting a Starting Certificate.
When updating your profile information, you may make changes to your name, ORCID, mailing contact information, or permanent contact information. The required fields in your profile are marked with an asterisk.

TIP: All correspondence related to your fellowship will be sent to your mailing contact information. Your mailing e-mail address will also be the e-mail address that all system-generated e-mails and reminders will be sent to. Please be sure that you keep this information up-to-date.

NOTE: While abroad, contact information should be updated by submitting or editing a Starting Certificate.

Fellow Data

After logging in, your name and mailing contact information are displayed in the Fellow Data area on the right side of your home page. If entered, the ORCID will be displayed under the name field.

Figure??: Fellow Data on Welcome Fellows Screen

NOTE: The Open Researcher and Contributor ID (ORCID) will display as a 16-digit number in groups of four digits separated by a hyphen, with a hyperlink to the ORCID registry web site. This will allow the Fellow to validate his/her profile on the registry.

Update Fellow Profile

To Update Your Profile:

1. Select the **Update My Profile** link from the Fellows Optional Task List.

Figure 117: Update My Profile Link

Your current profile information is displayed with the ability to edit each field.

Figure 118: Update My Profile Screen

2. Enter the changes to your profile information.

3. Click the **Save** button.

Once you have submitted the changes to your profile, a confirmation screen is displayed. You may select the Fellows Home Page link to return to your home page and task list. Any changes to your mailing contact information will be reflected in the profile area of your fellow data.

When you are a Fellow Abroad, your abroad address will also be displayed in the profile area of your fellow data once you have submitted a Starting Certificate. The Fellows Abroad address will be removed from your fellow data section once your Termination Certificate is completed for the Fellows Abroad period. The **Update My Profile** link should always be used to update your domestic address. NSF uses both the abroad and domestic e-mail addresses listed in your Fellow Data section to contact you while you are abroad.

NOTE: The Open Researcher and Contributor ID (ORCID), a 16-digit number, can be entered and updated by the Fellow.

Creating or Resetting Secret Questions and Answers

In the event you are unable to remember your login Password or User Name, you are able to reset (password) or retrieve (username) these items. To reset or retrieve your Password or Username, you will have to correctly answer either one or two secret questions.
To set or reset your Secret Questions and Answers:

1. Select the Reset Secret Questions link from your Optional Task List

Figure 119: Reset Secret Questions Link

The Reset Secret Questions screen appears:

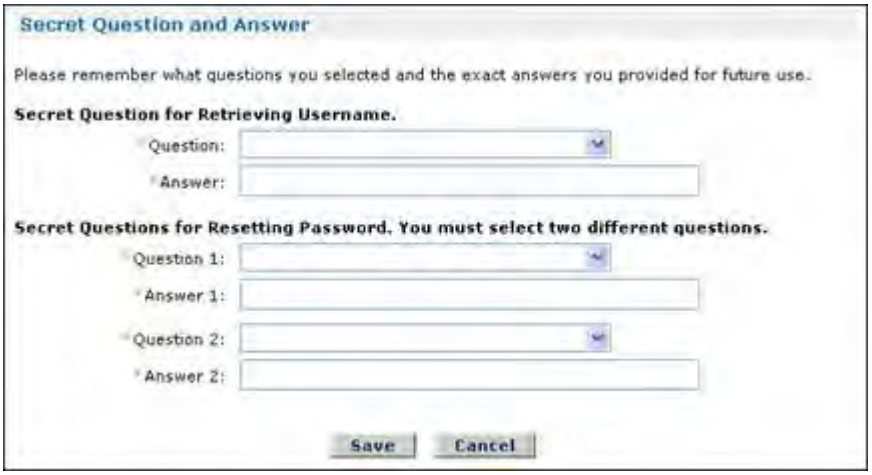


Figure 120: Reset Secret Questions Screen

2. Select one question for retrieving your Username and provide the answer.
3. Select two different questions for resetting your Password and provide the answers.
4. Click the **Save** button.

You will be need to recall the questions answered and to provide the correct answers to in the event you later choose to reset your password or retrieve your username through the Forgot Password or Forgot Username features (see the Resetting Your Password and Retrieving your Username sections)

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