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.

NSF Updates

Sign up for NSF Updates 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

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 in FastLane.

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).

FastLane modules are:

- Proposals, Awards, and Status
- Proposal Review
Activities Overview

FastLane covers 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

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, revised budgets and post-award requests
Withdraw a proposal that has already been submitted to NSF

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)**
  The individual(s) designated by the proposer, and approved by NSF, who will be responsible for the scientific or technical direction of the project. See PAPPG Exhibit II-7 for further information.

- **Other Authorized User (OAU)**
  An individual who is not a PI or Co-PI but is authorized to help prepare a budget, a revised budget or a proposal file update. The OAU must have the proposal PIN and ID number to access Proposals, Awards, and Status.

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

<table>
<thead>
<tr>
<th>FastLane Application</th>
<th>Who</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change PI Information</td>
<td>PI, Co-PI</td>
<td>Change your profile information that NSF has on file.</td>
</tr>
</tbody>
</table>

**Proposal Functions**

<table>
<thead>
<tr>
<th>Letters of Intent</th>
<th>PI, Co-PI</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Prepare a Letter of Intent in response to an NSF solicitation.</td>
<td></td>
</tr>
<tr>
<td>• Forward a Letter of Intent to the AOR for submission.</td>
<td></td>
</tr>
<tr>
<td>FastLane Help</td>
<td></td>
</tr>
<tr>
<td>---</td>
<td></td>
</tr>
</tbody>
</table>
| **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 the Proposal & Award Policies & Procedures Guide (PAPPG), Chapter X.A.3 for details on Requests for Prior Written Approvals and Chapter VII.A.2 for details on Grantee Notifications.) |
| **Continuation Funding Status** | | Check the status of continuation funding for an award. |
| **View/Print Award Documents** | | View and print award documents, including cooperative agreements. |
| **Update 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.) |

### Accessing Proposals, Awards, and Status

<table>
<thead>
<tr>
<th>Role</th>
<th>What You Need for Access</th>
<th>Registration Required?</th>
</tr>
</thead>
</table>
| Principal Investigator (PI)  
Co-PI | - Registration with NSF as PI (see your SPO)  
- Password | Yes |
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>
<thead>
<tr>
<th>Application</th>
<th>Who</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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Proposal Review

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Table 1 Proposal Review Applications

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<thead>
<tr>
<th>Role</th>
<th>What You Need for Access</th>
<th>Registration Required?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reviewer</td>
<td>• Proposal number from NSF Program Officer</td>
<td>No</td>
</tr>
<tr>
<td></td>
<td>• Proposal PIN from NSF Program Officer</td>
<td></td>
</tr>
</tbody>
</table>

See Accessing Proposal Review.

Accessing Proposal Review
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

<table>
<thead>
<tr>
<th>Application</th>
<th>Who</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Interactive Panel System</td>
<td>Panel member</td>
<td>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.)</td>
</tr>
<tr>
<td>Panel Review System</td>
<td></td>
<td>Prepare and submit a review of a proposal that is before the meeting.</td>
</tr>
<tr>
<td>Travel and Reimbursement System</td>
<td></td>
<td>• Make travel arrangements to attend a meeting at NSF.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Submit requests for NSF reimbursement of costs incurred for travel to the meeting.</td>
</tr>
</tbody>
</table>

See Accessing Panelist Functions.
Panelist Functions

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<td>Panel Review System</td>
<td></td>
<td>Prepare and submit a review of a proposal that is before the meeting.</td>
</tr>
<tr>
<td>Travel and Reimbursement System</td>
<td></td>
<td>• Make travel arrangements to attend a meeting at NSF.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Submit requests for NSF reimbursement of costs incurred for travel to the meeting.</td>
</tr>
</tbody>
</table>

Accessing Panelist Functions

<table>
<thead>
<tr>
<th>Role</th>
<th>What You Need for Access</th>
<th>Registration Required?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Panelist</td>
<td>• Panel ID from NSF</td>
<td>No</td>
</tr>
<tr>
<td></td>
<td>• Password from NSF</td>
<td></td>
</tr>
</tbody>
</table>
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
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)**
  - The administrative official who on behalf of the proposing organization is empowered to 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 to various NSF policies and grant requirements

### Table 1 Research Administration Applications

<table>
<thead>
<tr>
<th>Application</th>
<th>Who</th>
<th>Activity</th>
</tr>
</thead>
</table>
| Accounts Management                     | Organizational 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. |
| 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. |
| 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), Chapter X.A.3 for details on Requests for Prior Written Approvals and Chapter VII.A.2 for details on Grantee Notifications.)

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

<table>
<thead>
<tr>
<th>Role</th>
<th>What You Need for Access</th>
<th>Registration Required?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sponsored Project Office (SPO) Representative</td>
<td>Initial password from registration email from NSF</td>
<td>Yes</td>
</tr>
<tr>
<td>• Authorized Organizational Representative (AOR)</td>
<td>Initial password from SPO</td>
<td></td>
</tr>
<tr>
<td>• Financial Administrator</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Figure 1 Research Administration Home Page screen.

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
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

**Accessing Honorary Awards**

![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.](image)
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 in Research.gov.

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

<table>
<thead>
<tr>
<th>Application</th>
<th>Who</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>I am an Applicant</td>
<td>Applicant</td>
<td>Find the information on one of the postdoctoral and other programs, including instructions for applying.</td>
</tr>
<tr>
<td>I am a Sponsoring Scientist</td>
<td>Sponsoring Scientist</td>
<td>Find the information on one of the postdoctoral and other programs and special information for Sponsoring Scientists.</td>
</tr>
<tr>
<td>Individual Registration</td>
<td>Applicant</td>
<td>Register in Research.gov as an individual (required for preparing a proposal for a Postdoctoral Fellowship).</td>
</tr>
<tr>
<td>PI/Co-PI Login Page</td>
<td>Applicant</td>
<td>Log in to Proposals, Awards, and Status to prepare a proposal, once you have registered with FastLane.</td>
</tr>
<tr>
<td>Available Programs</td>
<td>Applicant and Sponsoring Scientist</td>
<td>Find information on all available programs with Postdoctoral Fellowships.</td>
</tr>
<tr>
<td>Analysis of Available Programs</td>
<td>Applicant and Sponsoring Scientist</td>
<td>View analyses of available programs in PDF format for downloading.</td>
</tr>
<tr>
<td>Role</td>
<td>What You Need</td>
<td>Registration Required?</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>------------------------------------------------------------------------------</td>
<td>------------------------</td>
</tr>
<tr>
<td>Researcher Applicant</td>
<td>No password required, <strong>but</strong> to prepare and submit a proposal, you must work in Proposals, Awards, and Status, where registration is required.</td>
<td>No</td>
</tr>
<tr>
<td>Sponsoring Scientist</td>
<td>Initial password from applicant</td>
<td>No</td>
</tr>
<tr>
<td>Letter of Reference Writer</td>
<td>Initial password from applicant</td>
<td>No</td>
</tr>
</tbody>
</table>

**Glossary**

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

**Unique Entity Identifier (UEI)**
The UEI information is a twelve-character information. Organizations must be registered with the National Science Foundation (NSF) to submit proposals using NSF’s systems. Before a new organization can register with NSF, it must first be registered in the System for Award Management (SAM - [https://www.sam.gov](https://www.sam.gov)) and have a UEI number. Note that completion of the SAM registration process may take up to two weeks.

**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 CFR 200, 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, and Honorary Awards.

**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 – Principal Investigator/Co-Principal Investigator(s)
The individual(s) designated by the proposer, and approved by NSF, who will be responsible for the scientific or technical direction of the project. See PAPPG Exhibit II-7 for further information. 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.

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.)

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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

Log in to Proposal Functions
Proposal Functions Login Introduction

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).

![FastLane Home Page screen. The Proposals, Awards, and Status link is circled.](image-url)
2. In the **PI/Co-PI Login** section (Figure 2), Click on **Sign In to Fastlane/Research.gov** button,
3. You will be redirected to Research.gov Sign In page. Type in the boxes the following information:
   - **NSF ID**
     Your National Science Foundation Identification number
   - **Password**
     Click the **Sign In** Button.
4. The Research.gov My Desktop page will be displayed. Click on **Proposals, Awards and Status** link under NSF FastLane Services.
5. The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management** screen displays (Figure 3).

6. Click **Proposal Functions** (Figure 3). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Proposal Functions** screen displays (Figure 4).
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).
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.
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 (Figure 2), Click on Sign In to Fastlane/Research.gov button,
3. You will be redirected to Research.gov Sign In page. Type in the boxes the following information:
   • NSF ID
     Your National Science Foundation Identification number
   • Password
     Click the Sign In button.
4. The Research.gov My Desktop page will be displayed. Click on Research Administration link under NSF FastLane Services.
5. The Research Administration page will be displayed.

Figure 3    Research Administration screen.
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.
   See one of the following for instructions:
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

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).

   ![Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management screen](image)

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

2. Click Proposal Functions (Figure 1).
Management Proposal Functions screen displays (Figure 2).

![Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management](image)

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

![Letters of Intent](image)

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

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

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).

![Research Administration Screen](image1.png)

**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).

![Letters of Intent Screen](image2.png)

**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

**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).

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
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).

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.
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).
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.

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

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).

   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).
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 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.

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.

12. 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
Add/Edit Personnel

1. Access the Create New LOI screen (Figure 1)

![Create New LOI screen](image)

**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
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.

Add/Edit Organizations
Access the Create New LOI screen (Figure 1)
Figure 1  Create New LOI screen. The Add/Edit Organizations button is circled.

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

3. In the **Organization Name** box (Figure 3), type at least three letters of the organization you are searching for.

4. 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.

5. 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.
6. Click the radio button next to an organization name to select an organization (Figure 4).
7. 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.

8. 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.
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.

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.](image)

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.

**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
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.
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...
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.

![Confirm LOI Screen](image1)

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

3. Click Letters of Intent (Figure 2). The Letters of Intent screen displays on the Create New LOI from Solicitation tab (Figure 3).
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 3** Letters of Intent screen on the Create New LOI from Program Solicitation tab. The Edit/View LOI tab is circled.

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

**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).
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.)
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 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.](image1)

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.](image2)
Progress section.

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.](image)

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.](image)
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.](image1)

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.](image2)
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.](image)

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.

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).
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.

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).
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**).

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

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).
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).

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.
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 secondary 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.

**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**).

   ![](image)

   **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.
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).

![Letters of Intent screen on the Edit/View LOI tab. The Submit link is circled.](image)

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.

![Confirmation LOI Forwarded to SPO screen.](image)
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.
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).

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.

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).

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.

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 Proposal & Award Policies & Procedures Guide (PAPPG), 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**

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](#).

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These individuals may have roles in preparing and submitting a proposal:
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- Co-PIs
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- 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 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

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.](image)

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

Proposal Functions

- **Letters of Intent**
- **Proposal Preparation**
- **Proposal Status**
- **Revise Submitted Proposal Budget**
- **Proposal File Update**
- **Research.gov Functions**

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).

**Proposal Actions**

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).

**Proposal Actions**

*Please note: A Data Management Plan will be required for all proposals submitted or due on or after January 18, 2011. FastLane will be updated to enable its upload as a separate Supplementary Document. Proposals that do not include the requisite plan will be stopped from submission. Specific guidance is included in Chapter II.C.2j of the revised NSF Proposal & Award Policies & Procedures Guide. FastLane will automatically expand the contract deadline date. Proposers should allow sufficient time to submit proposals before 5 PM submitter's local time on the deadline date(s) shown below or they risk not being able to submit their proposal to NSF.*

<table>
<thead>
<tr>
<th>Temporary Proposals in Progress</th>
<th>Deadline Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>757434 - SE ProofValid, Jenkins Test</td>
<td>03/05/2016</td>
</tr>
<tr>
<td>757433 - SE ProofValid, Jenkins Text</td>
<td>03/06/2016</td>
</tr>
<tr>
<td>757428 - ACPT Validation - pmdeep DNT</td>
<td>03/07/2016</td>
</tr>
<tr>
<td>757427 - SBR Phase I</td>
<td>03/08/2016</td>
</tr>
</tbody>
</table>

**Create New Proposal**

- Create Blank Proposal
- SBR Phase I
- SBR Phase II
- STTR Phase I
- STTR Phase II

**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.
**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).

![Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management screen. The Proposal Functions link is circled.](image1)

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

Proposal Functions

- Letters of Intent
- Proposal Preparation
- Proposal Status
- Revise Submitted Proposal Budget
- Proposal File Update
- Research.gov Functions

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 buttons are circled.

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

**Proposal Actions**

*Please note: A Data Management Plan will be required for all proposals submitted or due on or after January 18, 2011. FastLane will be updated to enable its upload as a separate Supplementary Document. Proposals that do not include the requisite plan will be stopped from submission. Specific guidance is included in Chapter 8.B.2 of the revised NSF Proposal & Award Policies & Procedures Guide.*

FastLane will automate the enforcement of deadline dates. Proposers should allow sufficient time to submit proposals before 5 PM submitters' local time on the deadline date(s) shown below or they risk not being able to submit their proposal to NSF.

<table>
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</thead>
<tbody>
<tr>
<td>Temporary Proposal # - Title of the Proposal - Deadline Date</td>
</tr>
<tr>
<td>577475 - Description of Proposal - Date of Submission</td>
</tr>
<tr>
<td>577474 - SE ProofVald. Jenkins Test - 03/06/2016</td>
</tr>
<tr>
<td>577473 - ACPT Validation - pradeep DNT - 03/06/2016</td>
</tr>
<tr>
<td>577427 - SBR Phase I - 03/06/2016</td>
</tr>
</tbody>
</table>

<table>
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<tbody>
<tr>
<td>Create Blank Proposal</td>
</tr>
<tr>
<td>SBR Phase I</td>
</tr>
</tbody>
</table>

| Go Back |

**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.
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).
FastLane Help

Proposal Actions

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

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.

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

1. Access the Sponsored Project Office (SPO) Access Control screen (Figure 1)

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.

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).

![Sponsored Project Office (SPO) Access Control](image)

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.

![The SPO can now view and edit proposal 7577428](image)

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).
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.

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)
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.

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

3. Click Proposal Preparation (Figure 2). The Principal Investigator (PI) Information screen displays (Figure 3).
4. Click either of the View Submitted buttons (Figure 3). The Submitted Proposals screen displays (Figure 4).

![Submitted Proposals](image)

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 PAPPG 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 PAPPG 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 PAPPG. A new Proposal can be created via the “Prepare Proposal” process.

![Proposal X000003 copied to new work in progress proposal# 7200398](image)

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.

![Proposal 2220192 cannot be copied. Please note that only proposals with the current GPG version can be copied. Please create a new proposal through the 'Prepare Proposal' process.](image)

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

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

**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).

**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).
**Proposal Actions**

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.
Proposal Forms

Prepare Proposal Forms

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). 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
- Nature of Natural or Anthropogenic Event
- 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 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.

Access and Print the Cover Sheet
1. Access the **Form Preparation** screen (Figure 1) (see [Create a New Proposal](#) or [Edit a Proposal](#)).

![Form Preparation Screen](image)

**Figure 1** Form Preparation screen.

2. Click the **Go** button for Cover Sheet (Figure 1). The **Cover Sheet Components Form** screen displays (Figure 2).
3. Click Print in the right navigation bar (Figure 2). The Print Menu screen (Figure 3) displays.

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.
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**

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).
2. Click the Go button for Awardee & Primary Performance Site Primary Location (Figure 1). The Organizations 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

![Organizations for this proposal](image)

**Figure 2** Organizations for This Proposal screen.

**Awardee & Project/Performance Site Primary Location Selection**

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).
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 Organizations 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  Organizations for This Proposal screen.
Add/Change Project/Performance Site Primary Location

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

![Organizations for This Proposal screen. The Add/Change Primary Place of Performance button is circled.](image1)

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.

![Add/Change Primary Place of Performance screen. The Save Primary Place of Performance button is circled.](image2)

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.

![Primary Place of Performance Successfully Saved](image)

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

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

![Organizations for This Proposal](image)

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

**Change Awardee**

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

![Organizations for This Proposal](image)
2. Click the Change Awardee button (Figure 1). The Organization Search screen displays (Figure 2), where you can search for and select the organization.

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 Organizations Located screen displays (Figure 3).

6. Highlight the organization on the Organizations 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 Organizations for This Proposal screen displays (Figure 5) with the information for the organization you selected.

Program Description/Announcement/Solicitation Number

You must select the applicable program description, announcement, or solicitation to which the proposal 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).
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.

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.

![Unit Selection Lists screen](image)

**Figure 3** **Unit Selection Lists screen.**

**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**
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**

**Select the NSF Primary Program**
1. Access the **Unit Selection Lists** screen (Figure 1) (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.
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 Selections Lists screen (Figure 1) (see NSF Unit of Consideration).
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.
Remainder of 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
  - Conflict of Interest Certification
  - Certification Regarding Flood Hazard Insurance
  - Certification Regarding Responsible Conduct of Research (RCR)
  - Certification Regarding Organizational Support
  - Certification Regarding Dual Use Research of Concern
  - Certification Regarding the Meeting Organizer’s Written Policy or Code-of-Conduct that Addresses Sexual Harassment, Other Forms of Harassment, and Sexual Assault
  - Certification Regarding Family Leave Status (or equivalent)

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

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).

![Cover Sheet Components Form](image)

**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.
Title of Proposed Project

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

Budget And Duration Information

Requested Amount: $444.00  (Note: The requested amount is calculated from the budget forms.)
Proposal Duration (in months): 24  
Requested Starting Date (MM/DD/YYYY): 12/12/2016

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.
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.

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.

**Announcement and Consideration**

1. Access the Remainder of the Cover Sheet screen (Figure 1) (see Access the Remainder of the Cover Sheet Screen).
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](attachment:image.png) 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.

   **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](attachment:image.png) 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).
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.

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

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 preproposal (Figure 2).

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

1. 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.

2. 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.

Awardee Organization

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

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
- Unique Entity Identifier (UEI) information
- Employer Identification Number (EIN) or Taxpayer Identification Number (TIN)

Organizations must be registered with the National Science Foundation (NSF) to submit proposals using NSF’s systems. Before a new organization can register with NSF, it must first be registered in the System for Award Management (SAM - https://www.sam.gov) and have a UEI number. Note that completion of the SAM registration process may take up to two weeks.
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

**Other Information**

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

![Remainder of the Cover Sheet](image)

**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:

- 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 (MMDDYY)
  - PHS Animal Welfare Assurance Number
- Human Subjects (PAPPG II.D.6)
  - Exemption Subsection
  - IRB App. Date (MMDDYY)
  - Human Subjects Assurance Number
- 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

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. 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)

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).

![Form Preparation Screen](image)

**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](image)

**Table Of Contents**

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</tr>
<tr>
<td>Project Summary (not to exceed 1 page)</td>
<td>1</td>
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<tr>
<td>Table of Contents</td>
<td></td>
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<tr>
<td>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 designate)</td>
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<td>References Cited</td>
<td>0</td>
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<tr>
<td>Biographical Sketches (Not to exceed 2 pages each)</td>
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<tr>
<td>Budget</td>
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</tr>
<tr>
<td>(Plus up to 3 pages of budget justification)</td>
<td></td>
</tr>
<tr>
<td>Current and Pending Support</td>
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<tr>
<td>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 designate)</td>
<td></td>
</tr>
</tbody>
</table>
References Cited

What Are References Cited?

References Cited is a listing of the references 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 PAPPG Chapter 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).

2. Click the Go button for References Cited (Figure 1). The References Cited screen displays (Figure 2).
You have these options:
- Enter References Cited in the text box
- Upload References Cited

**Enter References Cited in the Text Box**

1. Access the References Cited screen (Figure 1) (see Work on References Cited).

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.
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.](image1)

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.](image2)

*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:
FastLane Help

- **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).
FastLane Help

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 support you 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.

**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.

**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).
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 1  Form Preparation screen. The Go button for Budgets (Including Justification) is circled.

   Figure 2  Project Budget screen.

**Step 1  Add a Year**

1. Access the Project Budget screen (Figure 1) (see Create a Budget).
2. Click **Add Year** under the name of your organization (Figure 1). The **Budget Year Add** screen displays (Figure 2) for your organization.

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 1**  Project Budget screen. The Add Year link is circled.

**Figure 2**  Budget Year Add screen. The Add button is circled.

**Figure 3**  Project Budget screen with Year 1 added for creating a budget. The Funds link and the Personnel link are circled.

**Step 2 Enter the Budget Data**
1. Access the **Project Budget** screen (Figure 1) (see Create a Budget).

![Figure 1](image)

**Figure 1** Project Budget screen. The Funds link and the Spreadsheet Support link are circled.

Complete **Step 1 Add a Year**, Now you are ready to enter the budget data.

- 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](image)

**Figure 1** Project Budget screen with the Spreadsheet Support link is circled.

**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](image)

**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).
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).

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.

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.

![Budget Personnel screen](image)

**Figure 3: Budget Personnel screen**

### Other Personnel

1. Access the **Budget Year** screen (Figure 1) (see [Enter the Budget Data Online](#)).

![Budget Year screen](image)

**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).
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.

3. 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.

**Fringe Benefits**

1. Access the Budget Year screen (Figure 1) (see Enter the Budget Data Online).
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. Click the Calculate button (Figure 2) to total the amount of total salaries, wages, and fringe benefits you are requesting.

**Travel**
Access the Budget Year screen.

![Budget Year screen](image)

Click Travel (Figure 1). The Travel section of the Budget Year screen displays (Figure 2).

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.

1. 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).
2. Click the Calculate button (Figure 2) to calculate the total amount you are requesting for all travel.

**Participant Support Costs**

1. Access the Budget Year screen (Figure 1) (see Enter the Budget Data Online).
2. Click Participant Support Costs (Figure 1). The Participant Support Costs section of the Budget Year screen displays (Figure 2).

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.

4. Consistent with 2 CFR § 200.68, indirect costs (F&A) are not allowed on participant support costs.

5. In the Number of Participants box (Figure 2), type the number of participants for whom you are requesting the funds.

6. Click the Calculate button (Figure 2) to calculate the total amount of funds for participant support costs.

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).

![Other Direct Costs section of the Budget Year screen.](image)

Figure 2  **Other Direct Costs section of the Budget Year screen.**

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).

3. Click the Calculate button (Figure 2) to calculate the total amount of funding for other direct costs.

**Indirect Costs**

For instructions on Indirect Costs, go to the PAPPG II.C.2.g (viii)

**Cost Sharing**
The ability to enter cost sharing will only be available for those solicitations where cost sharing is required.

**Budget Year 1 for NSF**

A. Senior Personnel | B. Other Personnel | C. Fringe Benefits | D. Equipment | E. Travel | F. Participant Support Costs
G. Other Direct Costs | H. Total Direct Costs | I. Indirect Costs | J. Total Direct And Indirect Costs | K. Residual Funds
L. Amount of This Request | M. Cost Sharing

Access the Budget Year screen (Figure 1)

**Figure 1** Budget Year screen. The Cost Sharing link is circled.

1. 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.

2. In the **Proposed Level** box (Figure 2), type the proposed level of cost sharing (no dollar signs, no commas).

**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).
Upload the Budget Justification

The **Budget Justification File Upload** screen displays (Figure 3). See [Upload a File](#) for directions.

![Budget Justification File Upload screen](image)

**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.)

![Budget Justification for National Science Foundation](image)

**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.](image)

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.](image)
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.

```
<table>
<thead>
<tr>
<th>Organization</th>
<th>Year</th>
<th>Project Budget</th>
<th>Amount</th>
<th>Delete</th>
<th>Last Mod. Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>National Science Foundation</td>
<td>2</td>
<td>Funds - Personnel</td>
<td>$12,000</td>
<td>□</td>
<td>Jan-25-2022 16:06:26</td>
</tr>
<tr>
<td>NSF Credit Union</td>
<td></td>
<td></td>
<td></td>
<td>□</td>
<td></td>
</tr>
<tr>
<td>Add Year</td>
<td></td>
<td></td>
<td></td>
<td>□</td>
<td></td>
</tr>
<tr>
<td>Change PI</td>
<td></td>
<td></td>
<td></td>
<td>□</td>
<td></td>
</tr>
<tr>
<td>Change Org</td>
<td></td>
<td></td>
<td></td>
<td>□</td>
<td></td>
</tr>
<tr>
<td>Budget justification</td>
<td></td>
<td></td>
<td></td>
<td>□</td>
<td></td>
</tr>
<tr>
<td>Add Another Organization</td>
<td></td>
<td></td>
<td></td>
<td>□</td>
<td></td>
</tr>
<tr>
<td>Delete Checked Organization(s)</td>
<td></td>
<td></td>
<td></td>
<td>□</td>
<td></td>
</tr>
<tr>
<td>Delete Checked Year(s)</td>
<td></td>
<td></td>
<td></td>
<td>□</td>
<td></td>
</tr>
<tr>
<td>Go Back</td>
<td></td>
<td></td>
<td></td>
<td>□</td>
<td></td>
</tr>
</tbody>
</table>
```

Figure 3 Project Budget screen with the new budget listed for the newly selected year.

**Edit a Budget**

1. Access the Project Budget screen (Figure 1) (see Create a Budget).

```
<table>
<thead>
<tr>
<th>Organization</th>
<th>Project Budget</th>
<th>Amount</th>
<th>Delete</th>
<th>Last Mod. Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>East Carolina University</td>
<td>1 Fund - Personnel</td>
<td>$24,000</td>
<td>□</td>
<td>Jan-20-2022 21:54:56</td>
</tr>
</tbody>
</table>
```

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.

```
Budget Year 1 for National Science Foundation

A. Senior Personnel

Name: Alan Alghanem  Title: none  Calendar Months: 0.0  Academic Months: 0.0  Summer Months: 0.0  Funds Requested By Preparer: $5000

Total Senior Personnel: 1  0.0  0.0  0.0  $5000

```

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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.

Add or Delete Senior Personnel

1. Access the Project Budget screen (Figure 1) (see Create a Budget).

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).
**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.
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.

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).
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 1 Project Budget screen. The Add Another Organization link is circled.](image)

**Figure 1** Project Budget screen. The Add Another Organization link is circled.

You have two options for searching for the organization you want to add:
- **Search by name**
- **Search by UEI (Unique Entity Identifier) information**

### 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-Org ID** screen displays (Figure 3) (see **Select the Organization from the Results**).
Figure 3 Name-Org ID screen. The Select button is circled.

**Search by UEI**

1. On the **Current Budget Organizations** screen (Figure 2), type in the nine-digit DUNS number.
2. Click the **Search by UEI** button (Figure 2). The **Name-Org ID** screen displays (Figure 3).

**Select the Organization from the Results**

1. On the **Name-Org 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).

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.](image)

**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.](image)

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.
You have two options for searching for the organization you want to add:

- **Search by name**
- **Search by UEI (Unique Entity Identifier) information**

**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-Org ID** screen displays (Figure 3) (see **Select the Organization from the Results**).

**Search by UEI**

1. On the **Current Budget Organizations** screen (Figure 2), type in the twelve-character UEI information
2. Click the **Search by UEI** button (Figure 2). The **Name-Org ID** screen displays (Figure 3).

**Select the Organization from the Results**
1. On the Name-Org 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.](image)

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.](image)
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.](image1)

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.](image2)

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.
Create a Budget for the Subrecipient Organization

To create a budget for a selected year, you have this option:

- 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.

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.

Change the PI for a Subrecipient Organization

1. Access the Project Budget screen (Figure 1) (see Add a subrecipient Organization).

2. Under the name of the subrecipient organization, click *Change PI* (Figure 1). The Principal Investigator Designation screen displays (Figure 2).
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).

**subrecipient Change the Subrecipient Organization**

1. Access the **Project Budget** screen (Figure 1) (see **Add a subrecipient Organization**).

2. Click **Change Org.** under the name of the subrecipient organization you want to change (Figure 1). The **Change Organization** screen displays (Figure 2).

You have two options for searching for the organization you want to add:
- **Search by name**
- **Search by UEI (Unique Entity Identifier) information**
FastLane Help

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-Org ID screen displays (Figure 3) (see Select the Organization from the Results).

![Name-Org ID Screen](image)

**Figure 3** Name-Inst ID screen. The Select button is circled.

Search by UEI information

1. On the Current Budget Organizations screen (Figure 2), type in the twelve-character UEI information.
2. Click the Search by UEI button (Figure 2). The Name-Org ID screen displays (Figure 3) (see Select the Organization from the Results).

Select the Organization from the Results

1. On the Name-Org 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.

- 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).

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 1  Project Budget screen. The Delete Checked Organization(s) button is circled.

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.

![Project Budget Screen](image)

**Figure 3** Project Budget screen with the name of the deleted organization removed.

**Facilities, Equipment, and Other Resources**

**What Are Facilities, Equipment, and Other Resources?**

*In the Facilities, Equipment, and Other Resources section, you describe the resources 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](#)).
2. Click the Go button for Facilities, Equipment, and Other Resources (Figure 1). The Facilities, Equipment, and Other Resources screen displays (Figure 2).

**Figure 1**  Form Preparation screen. The Go button for Facilities, Equipment, and Other Resources is circled.

**Figure 2**  Facilities, Equipment, and Other Resources form screen.

You have this option:
- Upload Facilities, Equipment, and Other Resources
- Additional Single Copy Documents
- Project Summary
- Project Description
What Are Facilities, Equipment, and Other Resources?

In the Facilities, Equipment, and Other Resources section, you describe the resources 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).

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

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).

2.  Click the Upload File button (Figure 1). The Facilities, Equipment, and Other Resources File Upload screen displays (Figure 2). See Upload a File.
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.)

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.
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](#)).
2. Click the **Go** button for Deviation Authorization (Figure 1). The **Deviation Authorization** screen displays (Figure 2).

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.

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
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)

   ![Form Preparation screen](image)

   **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).
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 indicate why (optional).

5. Click the Save Text button (Figure 2). A screen displays with a confirmation message that FastLane has saved the data.

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


FastLane Help

- **Current and Pending Support**
- **Supplementary Docs**
- **Add/Delete Non-Co-PI Senior Personnel**
- **Change PI**
- **Link Collaborative Proposals**
- **Proposal Classification Form**

## Additional Single Copy Documents

### What Are Additional Single Copy Documents?

Additional single copy documents ([PAPPG Chapter II.C](#)) may be documents such as the following:

- Collaborators and Other Affiliations Information ([PAPPG Chapter II.C.1.e](#))
- Proprietary or Privileged Information included in your proposal as a separate statement ()
  - Confidential Budgetary Information ([PAPPG Chapter II.C.2.g(i)(d)](#)).
  - Nature of Natural or Anthropogenic Event ([PAPPG Chapter I.F](#))
  - Substitute Negotiator ([PAPPG Chapter II.C.1.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)
2. Click the Go button next to Additional Single Copy Documents (Figure 1). The Additional Single Copy Documents screen displays (Figure 2).

![Additional Single Copy Documents](image1)

**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](#)

### 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).
FastLane Help

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.](image)

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)

![Figure 1 Additional Single Copy screen. The Transfer File button is circled.](image)

3. Click the **Transfer File** button (Figure 1). The **Supplementary Document File Upload** screen displays (Figure 2). See [Upload a File](#) for directions.
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.

**Project Summary**

**What Is the Project Summary?**

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. Consult the Proposal & Award Policies & Procedures Guide (PAPPG) Chapter II.C.2.b for a full 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.

```
<table>
<thead>
<tr>
<th>Form</th>
<th>Saved</th>
<th>Form</th>
<th>Saved</th>
</tr>
</thead>
<tbody>
<tr>
<td>GO Cover Sheet</td>
<td>01/13/20</td>
<td>GO Project Summary</td>
<td>01/13/20</td>
</tr>
<tr>
<td>GO Table of Contents</td>
<td>N/A</td>
<td>GO Project Description</td>
<td>01/13/20</td>
</tr>
<tr>
<td>GO References Cited</td>
<td>01/13/20</td>
<td>GO Biographical Sketches</td>
<td>01/13/20</td>
</tr>
<tr>
<td>GO Budgets (Including Justification)</td>
<td></td>
<td>GO Current and Pending Support</td>
<td>01/13/20</td>
</tr>
<tr>
<td>GO Facilities, Equipment, and Other Resources</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
```

**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.
What Is the Project Summary?

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. Consult the Proposal & Award Policies & Procedures Guide (PAPPG) Chapter II.C.2.b for a full 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.
Form Preparation

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

<table>
<thead>
<tr>
<th>Form</th>
<th>Saved</th>
<th>Form</th>
<th>Saved</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cover Sheet</td>
<td>01/13/20</td>
<td><strong>Project Summary</strong></td>
<td>01/13/20</td>
</tr>
<tr>
<td>Table of Contents</td>
<td>N/A</td>
<td>Project Description</td>
<td>01/13/20</td>
</tr>
<tr>
<td>References Cited</td>
<td></td>
<td>Biographical Sketches</td>
<td>01/13/20</td>
</tr>
<tr>
<td>Budgets (Including Justification)</td>
<td>01/13/20</td>
<td>Current and Pending Support</td>
<td>01/13/20</td>
</tr>
<tr>
<td>Facilities, Equipment, and Other Resources</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**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.*
Enter the Project Summary in the Text Boxes

1. Access the **Project Summary** screen (Figure 1) (see Work on the Project Summary).

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.

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).
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).
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.
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 PAPPG Chapter 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).
4. Upload the Project Description. See Upload a File for instructions.

When you have accepted the upload, the Project Description File Upload screen (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.

**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)

![Form Preparation Screen](image1.png)

**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

**IMPORTANT NOTE:** A Biographical Sketch is required for all Senior Personnel and each individual's Biographical Sketch must be uploaded as a single PDF file associated with that individual. Users must submit Biographical Sketches in an NSF-approved format, such as SciENcv. A list of approved formats and policy guidance are available at the NSF-Approved Formats for Biographical Sketch policy page.

Upload a Biographical Sketch for each Senior Personnel by clicking on the Senior Personnel's button and then clicking on "Transfer File". On that screen click on the Browse button to select the file and then click on the "Upload File" button and follow the instructions.

For the "Other Personnel" categories listed in the PAPPG Chapter II.C.2.f(ii), their biographical sketch(es) should be clearly identified as "Other Personnel" biographical information and uploaded as a single pdf file in the Other Supplementary Documents section of the proposal.

For the "Equipment Proposals" category listed in the PAPPG Chapter II.C.2.f(iii), biographical sketch(es) for each auxiliary user should clearly be identified as "Equipment Proposal" biographical information and uploaded as a single pdf file in the Other Supplementary Documents section of the proposal.

Personnel assigned to proposal 8043701

| Go | Alan Alphaman | PI | PDF (1 pages) |

**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

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 for a full description of a Biographical Sketch.

Work on Biographical Sketches

1. Access the Form Preparation screen (Figure 1)

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
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

Submit Each Biographical Sketch Separately

1. Access the Assigned Personnel screen (Figure 1) (see Work on Biographical Sketches).
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 1 Assigned Personnel screen. The Go button for a Senior Person is circled.

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).
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
**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)**

   ![Form Preparation screen](image)

   **Figure 1** Current and Pending Support File upload page. 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.
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**

**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) FastLane Help
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.
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**

### 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](#)).

![Current and Pending Support Screen](image)

**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 File Upload** screen displays (Figure 2).
5. 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 and Pending Support
- Delete 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](#)).

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).
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 PAPPG Chapter 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 the Project Summary in this area. See Upload the 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).
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 1  Form Preparation screen. The Go button for Data Management Plan is circled.

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).

![Form Preparation screen](image)

**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).
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).
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).

![Form Preparation screen](image)

2. Click the **Go** button for RAISE - Program Officer Concurrence Emails on the **Form Preparation** screen (Figure 3). The RAPID, EAGER, RAISE - Program Officer Concurrence Emails Upload screen displays (Figure 4).
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.
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 PAPPG Chapter 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 the Project Summary in this area. See Upload the 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).

![Form Preparation screen. The Go button for Data Management Plan is circled.](image)
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).

![Data Management Plan Upload screen with browse field.](image)

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).
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).

---

**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.

Users are encouraged to upload PDF files (with the exception of the Collaborators and Other Affiliations form) that use the approved fonts in the Proposal & Award Policies & Procedures Guide (PAPPG). This enables the preservation of searchable text, avoiding delays in the processing and review of the proposal.

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 3  Form Preparation screen.

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).

![Form Preparation screen](image)

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 RAPID, EAGER, 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).
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 5 Form Preparation screen. The Go button for Other Supplementary Docs is circled.](image)

You have these options:
- Enter the Other Supplementary Document in the text box
- Upload the Other Supplementary Document

**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.](image)
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.

   ![Data for Other Supplementary Docs form saved. OK](image)

   **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).

   ![Other Supplementary Docs screen. The Transfer File button is circled.](image)

   **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.
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.

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
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
- 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 screen](image)

**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 screen](image)

**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 Proposal or Edit a Proposal).
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.

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.
5. Click the OK button (Figure 3). A screen displays (Figure 4) with the message that the PI on the proposal is now 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.

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:
FastLane Help

- Link a temporary proposal
- Delete a link between proposals

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- Project Description
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- Link a temporary proposal
- Delete a link between proposals

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.](image)

2. Click the Go button for Link Collaborative Proposals (Figure 1). The Link Collaborative Temporary Proposals
screen displays (Figure 2).

![Link Collaborative Temporary Proposals screen. The Add Collaborative TPI to Proposal button is circled.](image)

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.

![Screen with a message for you to confirm that you want to link a non-lead temporary proposal. The Yes button is circled.](image)

6. Click the **Yes** button (Figure 3). The **Temp. Proposal Added** screen displays (Figure 4) with a message that the proposal is now linked.

![Temp. Proposal Added screen.](image)

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
FastLane Help

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.

   ![Warning screen](image)

   **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.

   ![Proposition delinked](image)

   **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.)
<table>
<thead>
<tr>
<th>No.</th>
<th>Category Title</th>
<th>What Is It?</th>
<th>Why Does NSF Need It?</th>
</tr>
</thead>
<tbody>
<tr>
<td>I</td>
<td>Investigator Status</td>
<td>Select the current status of the PI or Co-PI on federal grants.</td>
<td>Assists analysis of research requests as they may relate to current or past federal funding</td>
</tr>
<tr>
<td>II</td>
<td>Fields of Science Other Than Biology</td>
<td>Select major scientific fields, in addition to biology, involved in the proposed research.</td>
<td>Indicates the type and extent of interdisciplinary research reviewed in BIO</td>
</tr>
<tr>
<td>III</td>
<td>Substantive Area</td>
<td>Select broad or thematic areas or experimental systems related to the proposed research; BIO has no preference.</td>
<td>Enables BIO to monitor activity in these areas for generating reports on the research reviewed</td>
</tr>
<tr>
<td>IV</td>
<td>Infrastructure</td>
<td>Select infrastructure, including material, intellectual, and human resources necessary to facilitate progress in the biological research.</td>
<td>Assists analysis of the adequacy of current infrastructure and identifying future infrastructural needs</td>
</tr>
<tr>
<td>V</td>
<td>Habitat</td>
<td>Indicate the habit in which the experimental system being studied is normally found.</td>
<td>Assists analysis of the environmental breadth of the research reviewed in BIO</td>
</tr>
<tr>
<td>VI</td>
<td>Geographic Area of Research</td>
<td>Indicate research-related region (not the location of your organization).</td>
<td>Provides data on geographic distribution of regions and organisms involved in research reviewed in BIO</td>
</tr>
<tr>
<td>VII</td>
<td>Classification of Organisms</td>
<td>Indicate the most specific taxonomic category represented in the research. Check the next- higher level if the appropriate taxonomic level is absent.</td>
<td>Assists analysis of the biological diversity of research reviewed in BIO</td>
</tr>
<tr>
<td>VIII</td>
<td>Model Organism</td>
<td>Indicate traditional laboratory model species.</td>
<td>Gives an estimate of how frequently traditional laboratory species are used in research requests</td>
</tr>
</tbody>
</table>

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](http://www.nsf.gov/bio) to go to the BIO Web site.

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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](image)

*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](image)

**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 Proposal & Award Policies & Procedures Guide (PAPPG) Selection and the Select button are circled.

6. Highlight Proposal & Award Policies & Procedures Guide (PAPPG) 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.
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 7  Cover Sheet Components Form screen. The Go Back button 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**).
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.](image)

### 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.](image)

### 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.
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)
2. For Category I (Figure 2), click the radio button for the appropriate selection for investigator status. Select one item.

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.
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.
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

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
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).

![Research Administration](image)

**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.
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).

---

**Research Administration**

Select a Research Administration function for National Science Foundation:

- Accounts Management
- Letters of Intent
- Proposals/Supplements/File Updates/Withdrawals
- Award Documents
- Forwarded/Submitted Revised Budgets
- Notifications & Requests - Disabled in FastLane. Log in to Research.gov
- Organizational Reports
- Project Reports - Disabled in FastLane. Log in to Research.gov

---
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.
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](image-url)

**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. **If you answered Yes**, in the text box under the radio buttons (Figure 4), type an explanation.
2. In the **Organization Information** section of the **Proposal Errors/Warnings** screen (Figure 5), check the accuracy of the information for your organization.

![Figure 5](image-url)

**Figure 5** Organization Information section of the Proposal Errors/Warnings screen. The Sign and Submit button is circled.
3. 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.

![Proposal Submission Confirmation](image)

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.

4. Write down the NSF proposal number.
5. 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).

![Research Administration](image)

Figure 1 Research Administration screen. The Proposals/Supplements/File Updates/Withdrawals link
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.](image)

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.](image)

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.

![Proposal TPI #6034411 was sent back to PI](image)
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).

   ![Research Administration screen. The Authorized Organizational Representative Functions link is circled.](image1)

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.

   ![Authorized Organizational Representative Functions screen.](image2)
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.
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.

You have these options on the **Authorized Organizational Representative Functions** screen:
- Sign a single proposal
- Sign several documents at once

**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
FastLane Help

- View and edit an update
- View the Update Summary
- Create an update PIN
- Allow 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

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.](image)

2. Click Proposal Functions (Figure 1). The Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Proposal Functions screen displays (Figure 2).
3. Click Proposal File Update (Figure 2). The List of Proposals Eligible for Update screen displays (Figure 3).

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).
6. Click the **Create Update** button (Figure 4). The **Proposal Update Control** screen for the proposal displays (Figure 5).

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.
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 8](image)

**Figure 8** Justification Note screen. The OK button is circled.

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).
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).

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).

   ![Justification Note screen. The OK button is circled.](image)

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).

![Proposal Update Control Screen](image)

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.
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).
FastLane Help

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).

![Proposal Update Control screen](image)

**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.

![Screen with message](image)

**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).
Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management

What Do You Want To Work On?

- Proposal Functions
- Award And Reporting Functions
- Change PI Information
- Research.gov Functions

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).

Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management

Proposal Functions

- Letters of Intent
- Proposal Preparation
- Proposal Status
- Revise Submitted Proposal Budget
- Proposal File Update
- Research.gov Functions

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).
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
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](image)

   **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management**

   **What Do You Want To Work On?**

   - Proposal Functions
   - Award And Reporting Functions
   - Change PI Information
   - Research.gov Functions

   **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](image)

   **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management**

   **Proposal Functions**

   - Letters of Intent
   - Proposal Preparation
   - Proposal Status
   - Revise Submitted Proposal Budget
   - Proposal File Update
   - Research.gov Functions
FastLane Help

**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).

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).
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

**Proposal Update Summary**

- Proposal Number: 0420108
- Title: Funds for Children of the Corn
- Update Number: 1
- Update Status: Allow SPO Submit

- PI Name: Alan Alphaman
- AOR Name: Electronically Signed Date:
- Update Submitted to NSF on:
- Program Officer: Not yet assigned.
- Phone: N/A
- Email:
- Update Processed by NSF on:

- ☑ Project Summary (Addition Requested)

[Buttons: View Current Section, View Proposed Replacement Section, View Proposal Update Justification Note]

**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.

![Proposal Update Summary screen](image)

**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](https://www.adobe.com/products/reader/fastlane.html).

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.
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).
FastLane Help

### View Submitted Proposal

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.

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<tr>
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<th>Cover Sheet</th>
<th>GO</th>
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<td>GOALI - Industrial PI Confirmation Letter</td>
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<td>Collaborators and Other Affiliations</td>
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<td>RAPID, EAGER, RAISE - Program Officer Concurrence Emails</td>
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<td>Suggested Reviewers</td>
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<td>GO</td>
<td>Nature of Natural or Anthropogenic Event</td>
<td>GO</td>
<td>Print Entire Proposal</td>
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</table>

![Figure 3 View Submitted Proposal screen.](image)

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**

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).
Principal Investigator(PI)/Co-Principal Investigator(Co-PI) Management

What Do You Want To Work On?

- Proposal Functions
- Award And Reporting Functions
- Change PI Information
- Research.gov Functions

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

Principal Investigator(PI)/Co-Principal Investigator(Co-PI) Management

Proposal Functions

- Letters of Intent
- Proposal Preparation
- Proposal Status
- Revise Submitted Proposal Budget
- Proposal File Update
- Research.gov Functions

3. Click Proposal File Update (Figure 2). The List of Proposals Eligible for Update screen displays (Figure 3).
4. Click the **Display Submitted Updates** button (Figure 3). The **Submitted Proposal File Updates** screen displays (Figure 4).

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.
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.](image)

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.

![Research Administration](image)

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.
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

![Screen Shot](image1)

**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.
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.

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 1
Proposals/Supplements/File Updates/Withdrawals screen on the Documents in Progress tab. The Temp ID for a Proposal File Update is circled.

1. Access the Proposals/Supplements/File Updates/Withdrawals screen on the Documents in Progress tab (Figure 1).

### 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. 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

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
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.
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).
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).

![Proposals/Supplements/File Updates/Withdrawals screen on the Documents in Progress tab. The Check link is circled.](image)

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.

![Proposal File Update Errors/Warnings screen.](image)

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.](image)

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.)

   ![Project Summary](image)

   **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.
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.
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.

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)
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.

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 **Organization Information** section of the **Proposal Errors/Warnings** screen (Figure 4), check the accuracy of the information for your organization.

![Organization Information](Figure 4)

Figure 4  Organization 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.

![Proposal Submission Confirmation](Figure 5)

**Proposal 6557745 has been successfully submitted to NSF**

This proposal has now been assigned the following NSF Proposal Number:

0613738

Please make a note of this number, it is the official NSF proposal number.

**Your Signature has been recorded**

OK
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).

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.

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.

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).
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)

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**Figure 2**  
Proposals/Supplements/File Updates/Withdrawals screen on the **Documents in Progress** tab. The **Submitted Documents** tab is circled.

**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.
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 1](image1.png)
   
   **Figure 1** Research Administration screen. The **Proposals/Supplements/File Updates/Withdrawals** link 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)
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).

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.
2. Click the OK button (Figure 5). The Proposal Update Summary screen displays (Figure 4).

![Proposal Update Summary screen](image)

**Figure 5** Justification Note screen. The OK button is circled.

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).

![Proposal Update Summary screen](image)

**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).
**FastLane Help**

**View Submitted Proposal**

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.

1. Access the Proposals/Supplements/File Updates/Withdrawals screen on the Submitted Documents tab (Figure 1) (see Work with Submitted Proposal File Updates).

**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).
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.
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).
2. Click **Authorized Organizational Representative Functions**. The **Authorized Organizational Representative Functions** screen displays (Figure 2).

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.

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**Figure 1** Research Administration screen. The Authorized Organizational Representative Functions link is circled.

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**Figure 2** Authorized Organizational Representative Functions screen. The check mark box for the Proposed File Update to sign and the Sign button are circled.

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**Figure 3** Electronic Signature Notice screen. The Sign button is circled.
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 Proposal As a PI
Once your proposal has been assigned to a program officer you will be able to use Research.gov to track the status of your proposal.

1. To track the status of your proposal, visit www.research.gov click on ‘Sign In’ and enter your NSF ID and password.
2. Once authenticated, in the desktop menu under ‘Prepare & Submit Proposals’, select ‘Proposal Status.’
3. In the Proposal Status page, click on the ‘Agency Tracking Number’ for details about the status of that proposal, including panel reviews and overdue reports.

Users attempting to check the status of their proposal through Proposals, Awards and Status will be redirected to Research.gov

Principal Investigator(PI)/Co-Principal Investigator(Co-PI) Management

What Do You Want To Work On?

Proposal Functions

Award And Reporting Functions

Change PI Information

Research.gov Functions
1. 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).

![Proposal Functions Screen](image)

2. Click Proposal Status (Figure 2). Users will be redirected to the Proposal Status page in Research.gov.

**View the Panel Summary and Reviews of a Proposal**

1. Access the Proposal Status screen of Research.gov and click on the Agency Tracking number. Panel summaries and reviews, if released, will be available at the bottom of the page.

**Check the Status of a Submitted Proposal as an SPO/AOR**

1. To track the status of a proposal, visit [www.research.gov](http://www.research.gov) click on ‘Sign In’ and enter your NSF ID and password.
2. Once authenticated, in the desktop menu under ‘Prepare & Submit Proposals’, select ‘Proposal Status.’
3. In the Proposal Status page, click on the ‘Agency Tracking Number’ for details about the status of that proposal, including panel reviews and overdue reports.

Users attempting to check the status of their proposal by accessing the Recent Proposals report in Organizational Reports will be redirected to the Research.gov Proposal Status page.
Figure 1  Research Administration screen. The Organizational Reports link is circled.

1. Click Organizational Reports (Figure 1). The Organizational Reports screen displays (Figure 2).

Figure 2  Organizational Reports screen with Recent Proposals radio button removed and text referring users to visit Research.gov

1. Click on the Research.gov hyperlink
2. A new tab will open and load the Research.gov Proposal Status page and display the AOR/SPO’s proposals

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.](image1)

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.](image2)

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

![Principal Investigator (PI) Information](image1)

**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).

![Submitted Proposals](image2)

**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.
View Submitted Proposal

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.

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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.
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).

![Research Administration screen](image1.png)

**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).

![Proposals/Withdrawals/File Updates/Withdrawals screen](image2.png)

**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).

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.

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Figure 5  View Submitted Proposals screen. The Go button for Print Entire Proposal 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

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
FastLane Help

- 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.*

*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.

**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).
Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management

What Do You Want To Work On?

- **Proposal Functions**
- **Award And Reporting Functions**
- **Change PI Information**
- **Research.gov Functions**

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).
3. Click Revise Submitted Proposal Budget (Figure 2). The List of Proposals screen displays (Figure 3) with the list of your organization’s proposals.

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.)
View the Budget

1. Access the Proposal Revised Budget screen (Figure 1)

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).

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.
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.
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).

If 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).
2. Click **Budget Impact Statement** (Figure 1). The **Budget Impact Statement** screen displays (Figure 2).

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
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.](image)

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.](image)

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.](image)

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.](image)

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).

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).
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.

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).

   ![Proposal Revised Budget screen](image1.png)

   **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).

   ![Add/Delete Non-Co-Principal Investigator (Co-PI) Senior Personnel Assigned to Proposal](image2.png)

   **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).

![Research Administration Screen](image)

**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).
FastLane Help

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).

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.
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).

![Research Administration screen. The Forwarded/Submitted Revised Budgets link is circled.](image)

2. Click **Forwarded/Submitted Revised Budgets** (Figure 1). The **Forwarded/Submitted Revised Budgets** screen displays on the **Forwarded by PI** tab (Figure 2).

![Figure 4] Summary Proposal Budget screen in PDF format. The Print icon is circled.
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).
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).

2. Click Forwarded/Submitted Revised Budgets (Figure 1). The Forwarded/Submitted Revised Budgets screen displays on the Forwarded by PI tab (Figure 2).
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).

4. On the **Project Budget** screen (Figure 3), click **Budget Impact Statement**. The **Budget Impact Statement** screen displays (Figure 4).
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.](image)

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.](image)
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.](image)

2. Click **Forwarded/Submitted Revised Budgets** (Figure 1). The **Forwarded/Submitted Revised Budgets** screen displays on the **Forwarded by PI** tab (Figure 2).
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.

![Refresh to Last Submitted Budget](image)

**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.

![The budget refresh was successful. The current working budget has been deleted.](image)

**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.
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.

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
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).
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](#).

![Summary Proposal Budget screen](image)

**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

**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

**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) 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).
3. Click Proposal Preparation (Figure 1). The Principal Investigator (PI) Information screen displays (Figure 3).

4. Click the View Submitted button (Figure 3). The Submitted Proposals screen displays (Figure 4).
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).

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
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.*

![Proposal Withdrawal](image)

**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).
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 1: Proposal Withdrawal screen. The Forward to SPO button is circled.](image1)

![Figure 2: Your Notification Was Forwarded screen with the message that the Proposal Withdrawal was forwarded to the SPO.](image2)

3. Click the **Return to Submitted Proposals** button (Figure 2). The **Submitted Proposals** screen displays (Figure 3).
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 3** Submitted Proposals screen.

**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.
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).

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

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).

![Research Administration](image)

**Research Administration**

Login for the following permission based functions:

- Accounts Management
- Letters of Intent
- Proposals/Supplements/File Updates/Withdrawals
- Award Documents
- Forwarded/Submitted Revised Budgets
- Notifications & Requests
- Organizational Reports
- Project Reports – Disabled in FastLane. Log in to Research.gov

**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).
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.

4. Click **Withdraw** (Figure 3) on the row for the proposal you want to withdraw. The **Proposal Withdrawal** screen displays (Figure 4).
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.
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).

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.
FastLane Help

Your Notification Was Saved Successfully

Please note that this notification must be submitted before any action is taken. Click on "Return to Submissions" button to return to the Submissions screen.

Return to Submissions

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)

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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.
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.

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.](image)

   **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).
**Proposal Withdrawal** screen displays (Figure 2) with the Proposal Withdrawal.

![Proposal Withdrawal Screen](image)

**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.

![Your Notification Was Deleted Screen](image)

**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
FastLane Help

(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.
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.

6. Click the **OK** button (Figure 4). The **Proposal Withdrawal Successful** screen displays (Figure 5).
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

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)

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).
Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management

What Do You Want To Work On?

- Proposal Functions
- Award And Reporting Functions
- Change PI Information
- Research.gov Functions

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).

Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management

Award and Reporting Functions

- Notifications and Requests - Disabled In FastLane, Log In to Research.gov
- Continuation Funding Status
- View/Print Award Documents
- Project Reports - Disabled In FastLane, Log In to Research.gov
- Supplemental Funding Request
- Research.gov Functions

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).

![FastLane Home Page screen. The Research Administration link is circled.](image1)

![Research Administration screen. The Login section is circled.](image2)

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

![Research Administration Screen](image)

**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.+

<table>
<thead>
<tr>
<th>Notifications</th>
<th>Special Notes</th>
<th>Requests</th>
<th>Special Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annual and Final Cost Share Notification by Recipient</td>
<td>AOR only</td>
<td>Subawarding, Transferring or Contracting Out Part of an NSF Award</td>
<td>Requires completion of more than one action</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>For the functions of this request, see the instructions for this action.</td>
</tr>
<tr>
<td>PI/PD or co-PI/co-PD Transfer from One Organization to Another</td>
<td></td>
<td></td>
<td>Requires AOR of both the new and original organizations</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>New AOR submits to NSF</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Requires AOR permissions to submit</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Requires completion of more than one action</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>For the functions of this request, see the instructions for this request.</td>
</tr>
<tr>
<td>Change PI/PD and Add/Change co-PI/co_PD</td>
<td></td>
<td></td>
<td>Requires AOR permissions to submit</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Requires completion of more than one action</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>For the functions of this request, see the instructions for this request.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Cannot be submitted if there is an overdue project report associated with the PI or Co-PIs on the award</td>
</tr>
</tbody>
</table>

**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.](image1)

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.](image2)

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](#)
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.

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).

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
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](image1.png)

**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](image2.png)

**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:
   - Sub awarding/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
FastLane Help

- **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.)

## 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.](image)

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).
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).

   ![Notifications and Requests screen on the Prepared by PI tab. The Notification/Request Type link is circled for a notification.](image1)

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).
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:
     - Sub awarding, 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.
1. Access the **Notifications and Requests** screen on the **Prepared by PI** tab (Figure 1) (see [Access Notifications and Requests as a PI](#)).

![Notifications and Requests screen on the Prepared by PI tab. The Forward link is circled for a request.](image)

**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.)

![Forward Notification screen. The Forward to SPO button is circled.](image)

**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.
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).

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**).
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.](image)

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.](image)

**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.
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).

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

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
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.
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).

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.

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.

- **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).

![Notifications and Requests screen on the Prepared by SPO tab.](image)

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.)

![View Notification screen.](image)

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).
2. On the View Notification screen (Figure 1), click the Modify button (Figure 1). The Modify Notification (or Modify Request) screen displays (Figure 2).

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
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- **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.

![View Notification for Award: 1431879 Short-Term Absence of the PI/PD (Up to Three Months)](image)

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**).

![Notifications & Requests screen](image)

2. In the **Work in Progress** section of the **Notifications and Requests** screen (Figure 1), click **Submit** in the row for the notification.
FastLane Help

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).
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.)

3. Click the **Delete** button (Figure 2). The **Deleted** screen displays (Figure 3) with a message that the notification (or request) has been deleted.
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**
FastLane Help

- 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 a listing of the notifications and requests that have been forwarded by PIs but have not been submitted to NSF.

![Notifications and Requests screen on the Forwarded by PI tab.](image)

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 a listing of the notifications and requests that have been forwarded by PIs but have not been submitted to NSF.

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 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.
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.

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**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.)

![View Request screen. The Return to PI button is circled.](image)

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.)

![Return Request screen. The Return to PI button is circled.](image)

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.

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.)
FastLane Help

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**).
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 1** Notifications and Requests screen on the Forwarded by PI tab. The Submitted to NSF tab is circled.

**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.](image)

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.](image)

**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.
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.

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.
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.

![Notifications and Requests screen on the Submitted to NSF tab. The Status column is circled.](image)

**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.

![Notifications and Requests screen on the Submitted to NSF tab. The Notification/Request Type link is circled for a notification.](image)
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.

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.
4. Click Return to Search Results (Figure 2). The Notifications and Requests screen displays on the Submitted to NSF tab (Figure 1).

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

**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.

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.](image)

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.](image)

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

430
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

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**Figure 3**  
**View Notification for Cost Sharing.**

- 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.**
FastLane Help

2. Modify the notification as you require (see the instructions for the type of notification you are working on).

3. Click the Save button. The View Notification screen displays the changed information. Only a PI or Co-PI can forward a notification to the SPO.

4. On the View Notification screen, click the Forward to SPO button. The Forward Notification screen displays. At the top of the screen is a message for you to confirm that you want to forward the notification to the SPO.

5. Click the Forward to SPO button. The Forwarded screen displays the message that the notification has been sent to the SPO.


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. Click on the Submit to NSF button

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.
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.

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.)
1. Access the View Notifications Screen. 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.

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.

3. Click the Delete button. The Deleted screen displays the message that the notification has been deleted.

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.)

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 an NSF 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 subrecipient 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 Chapter VII.B.3, NSF grant conditions identify which articles flow down to subrecipients.

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.)
FastLane Help

![Form Preparation Screen]

**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)

(Check 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).
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.

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 a Subawarding, Transferring or Contracting Out a Part of an NSF Award Request).
## Subawarding, Transferring or Contracting Out Part of an NSF Award

**Award Number:** 0840661  
**Title:** Collaborative Research: Gaming and Interactive Visualization for Education

### Form Preparation

<table>
<thead>
<tr>
<th>Form Description</th>
<th>Saved Form</th>
<th>Saved Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description of work to be performed</td>
<td></td>
<td>06/25/21</td>
</tr>
<tr>
<td>Budgets (Including Justification)</td>
<td></td>
<td>06/25/21</td>
</tr>
<tr>
<td>Add/Delete Senior Personnel (other than PI/Co-PI)</td>
<td>N/A</td>
<td></td>
</tr>
</tbody>
</table>

[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 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).

### Certification Regarding the Meeting Organizer's Written Policy or Code-of-Conduct that Addresses Sexual Harassment, Other Forms of Harassment, and Sexual Assault (This certification is only applicable to travel proposals)

By electronically signing the Cover Sheet, the AOR is certifying that prior to the proposer’s participation in the meeting, the proposer will assure that the meeting organizer has a written policy or code-of-conduct that addresses sexual harassment, other forms of harassment, and sexual assault, and that includes clear and accessible means of reporting violations of the policy or code-of-conduct. The policy or code-of-conduct must address the method for making a complaint as well as how any complaints received during the meeting will be resolved. The proposer is not required to submit the meeting organizer’s policy or code-of-conduct for review by NSF.

### Certification Regarding Family Leave Status (or equivalent) (This certification is only applicable to career-life balance supplemental funding requests)

By electronically signing the certification pages, the Authorized Organizational Representative hereby certifies that the request for a technician (or equivalent) is because the (PI/co-PI/senior personnel/NSF Graduate Research Fellow/postdoctoral researcher/graduate student) is, or will be, on family leave status (or equivalent) from the organization in accordance with the organization’s policies. The Authorized Organizational Representative also affirms that the organization is able to fill the position for which funding is being requested, in an appropriate timeframe.

[Sign and Submit]  
[Delete This 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.

![Subaward Request was submitted and signed.](image)

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).

Addition of SubAward

Award Number: 0700000
Title: Doctoral Dissertation Research: The Greater Yellowstone Coalition and Environmental Politics in the New West

Form Preparation

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

<table>
<thead>
<tr>
<th>Form</th>
<th>Saved Form</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description of work to be performed</td>
<td>N/A</td>
</tr>
<tr>
<td>Budgets (Including Justification)</td>
<td>N/A</td>
</tr>
<tr>
<td>Add/Delete Senior Personnel (other than PI/Co-PI)</td>
<td>N/A</td>
</tr>
</tbody>
</table>

Forward to SRO  Delete This 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
ubaward 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

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
FastLane Help

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).
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.](image)

See Budgets (Including Justification) and Create a Budget, Step 2 for instructions on how to 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).
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).

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**).  

![Image of Subawarding, Transferring or Contracting Out a Part of an NSF Award Form Preparation](image-url)

**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).

![Image of Justification for Subrecipient Selection File Upload](image-url)

**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 Subawardee 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).
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 1 Subawarding, Transferring or Contracting Out a Part of an NSF Award Form Preparation screen. The Go button for Other Supplementary Docs is circled.*

*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.
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 Proposal & Award Policies & Procedures Guide (PAPPG) Chapter VI.D.3.c, 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.](image)

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 PAPPG Chapter VI.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).
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.)
The PI Transfer Request?

Consistent with the Proposal & Award Policies & Procedures Guide (PAPPG) Chapter VII.B.2.f, if a PI plans to leave an organization during the course of a grant, you must submit to NSF 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) Chapter VII.B.2.f, if a PI plans to leave an organization during the course of a grant, you must submit to NSF 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.

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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.](image)

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).

![Figure 2 Grant Transfer Request screen.](image)

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 Organization 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.

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 **Organizations Located** screen displays (Figure 5).

Figure 4 Organization Search screen.

Figure 5 Organizations 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.

![Image of Request Details section of the Grant Transfer Request screen](image1)

**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.

![Image of FastLane Contacts screen for Purdue University](image2)

**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.
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).

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.](image)

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.](image)
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).

![Figure 2 Grant Transfer Request screen.](image)

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 **Organization 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.](image)
Figure 4   Organization 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 **Organizations Located** screen displays (Figure 5).

Figure 5 Organizations 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.
In the **Request Details** section of the **Grant Transfer Request** screen (Figure 6), click the **View Contact Information** link 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.

**Figure 7**  
**FastLane Contacts screen.**

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.
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).

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

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.
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).

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
FastLane Help

- 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.](image)

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.](image)

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).
FastLane Help

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).
Figure 3  Edit Principal Investigator's (PI) Information screen. The Change Organization button is circled.

4. To change your organization, click the Change Organization button (Figure 3). The Organization Search screen displays (Figure 4).
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 **Organization Search** screen displays (Figure 5).

8. Highlight the organization in the **Organizations 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 Organization 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.
11. Click the OK button (Figure 7). The Principal Investigator (PI) Information screen displays (Figure 8).

**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).
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.

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).

![Click on a Link to Work](Image)

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.

![Forward the Grant Transfer Request](Image)
3. Click the **Forward** button (Figure 2). The **Grant Transfer Request Forwarded to Original SPO** screen displays (Figure 3).

![Grant Transfer Request Forwarded to Original SPO](image1)

**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

![Click on a Link to Work](image2)

**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).
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.

![Delete the Grant Transfer Request screen](image)

**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](#)).

![Click on a Link to Work screen](image)

**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.

![Print Menu screen](image)
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).

![Notifications and Requests screen on the Prepared by PI tab. The Prepare New button is circled.](image)

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).

![Prepare a New Notification or Request screen. The radio button for PI Transfer and the Prepare button are circled.](image)

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.
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).

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

**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.](image)

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).
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 Organization 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 2](image1)

**Figure 2** Grant Transfer Request screen.

![Figure 3](image2)

**Figure 3** Request Details section of the Grant Transfer Request screen. The Select New Awardee Organization 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 **Organizations Located** screen displays (Figure 5).

   ![Figure 4 Organization Search screen. The Locate button is circled.](image)

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 5 Organizations Located screen. The Select button is circled.](image)
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.

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 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).
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.)
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.](image1)

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).

![Figure 2 Grant Transfer Request screen. The Save and Continue button is circled.](image2)
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)
FastLane Help

- Supplementary Documents
- Add/Delete Senior Personnel
  (Click on a link above for the instructions for that form.)

![Forms for Temp. Proposal #9913625](image)

**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).

![Click on a Link to Work](image)

**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.](image1)

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.](image2)

**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.

![Forward the Grant Transfer Request to New SPO screen](image1)

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.

![Grant Transfer Request Forwarded to New SPO screen](image2)

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

![Click on a Link to Work](image)

**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).

![Click on a Link to Work](image)

**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.

![Return the Grant Transfer Request to PI](image)

**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).
FastLane Help

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

![Click on a Link to Work](image)

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).

![Click on a Link to Work](image)

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.
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).

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).

2. Find the PI Transfer Request you want to work on (see Search for Notifications and Requests Forwarded).
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 screen. The Save and Continue button is circled.](image)

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](#)"

![Lower portion of the Grant Transfer Request screen.](image)

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).
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")

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](#)).

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.)
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).

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).

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).
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.

   ![Completeness Checking of Request for Grant Transfer](image)

   **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).

   ![Grant Transfer Request Is Ready for Submission](image)

   **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).

Figure 4 Submit Grant Transfer Request to NSF screen.
4. 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](image)

**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](image)

**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).
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).

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).
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.

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.

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](#)).

![Click on a Link to Work screen. The View Transfer Request button is circled.](image1)

**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.

![Print Menu screen for the PI Transfer Request. The Go button for Print Entire Request is circled.](image2)

**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).
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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**.
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.)

![Form Preparation screen](image)

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.

![Click on a Link to Work](image)

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:
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- **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.)

---

**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).

---

**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.
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**

![Progress Summary File Upload screen with options to view and delete the uploaded Progress Summary.](image)

**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](#)).
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 screen.](image.png)

See Budgets (Including Justification) and Create a Budget, Step 2 for instructions on how to 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).
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 1 Form Preparation screen. The Go button for Description of Work to be Accomplished is circled.

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 2 Description of Work to be Accomplished File Upload screen.
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).
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 1: Form Preparation screen. The Go button for Other Supplementary Docs is circled.](image1)

![Figure 2: Supplementary Docs screen. The Save Text button is circled.](image2)

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.](image3)

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.
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](Path_to_image1.png)

*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](Path_to_image2.png)

*Figure 2 Add/Delete Non-Co-Principal Investigator (Co-PI) Senior Personnel Assigned to the Proposal*
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.

**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).
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 Current and Pending Support and Substitute Negotiator documents
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:** The Substitute Negotiator document is submitted in cases where a former NSF employee or IPA is being reappointed as PI or Co-PI to an award with which they were previously involved.

**Note:** When you complete a step, the section for the next step is activated on the **Request for Change PI and Add/Change Co-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.](image-url)
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 AOR) 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 Current and Pending Support and Substitute Negotiator documents
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: The Substitute Negotiator document is submitted in cases where a former NSF employee or IPA is being reappointed as PI or Co-PI to an award with which they were previously involved.

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](image3.png)

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.)
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.
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 2 Confirm Eligibility of Proposed PI/Co-PI section of the Change PI and Add/Change Co-PI screen. The Check button is circled.](image)

**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.

![Figure 3 Confirm Eligibility of Proposed PI/Co-PI section of the Request for Change PI and Add/Change Co-](image)

**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.

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.
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).
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).
2. In the **Associated Documents** section (Figure 1), upload a Biographical Sketch (see [What Is a Biographical Sketch?](#)), a Current and Pending Support document (see [What Is Current and Pending Support?](#)) and a Substitute Negotiator document (see [What Is a Substitute Negotiator?](#)) 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.

![Request for Award 2001752 - Change PI and Add/Change PI/Co-PI screen](image)

**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:
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- 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.
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](image)

**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).
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 4](image)

**Figure 4** Request for Change PI and Add/Change Co-PI screen. Step 3 Justification is activated. The Save button is circled.

![Figure 5](image)

**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**).
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.
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.

![Forwarded screen](image)

**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.

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**.
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.

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.
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.](image)

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: 0840661
Title: Collaborative Research: Gaming and Interactive Visualization for Education

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.

<table>
<thead>
<tr>
<th>Form</th>
<th>Description of work to be performed *</th>
<th>Saved</th>
<th>Form Date</th>
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<td>06/25/21</td>
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<tr>
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<td>06/25/21</td>
<td>Go</td>
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</tr>
<tr>
<td>Go</td>
<td>Add/Delete Senior Personnel (other than PI/Co-PI)</td>
<td>N/A</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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).

Certification Regarding the Meeting Organizer’s Written Policy or Code-of-Conduct that Addresses Sexual Harassment, Other Forms of Harassment, and Sexual Assault (This certification is only applicable to travel proposals)

By electronically signing the Cover Sheet, the AOR is certifying that prior to the proposer’s participation in the meeting, the proposer will assure that the meeting organizer has a written policy or code-of-conduct that addresses sexual harassment, other forms of harassment, and sexual assault, and that includes clear and accessible means of reporting violations of the policy or code-of-conduct. The policy or code-of-conduct must address the method for making a complaint as well as how any complaints received during the meeting will be resolved. The proposer is not required to submit the meeting organizer’s policy or code-of-conduct for review by NSF.

Certification Regarding Family Leave Status (or equivalent) (This certification is only applicable to career-life balance supplemental funding requests)

By electronically signing the certification pages, the Authorized Organizational Representative hereby certifies that the request for a technician (or equivalent) is because the (PI/co-PI/senior personnel/ NS Graduate Research Fellow/postdoctoral researcher/graduate student) is, or will be, on family leave status (or equivalent) from the organization in accordance with the organization’s policies. The Authorized Organizational Representative also affirms that the organization is able to fill the position for which funding is being requested, in an appropriate timeframe.

Sign and Submit  Delete This Request

Go Back
2. On the **View Request** screen (Figure 1), click on any of the forms to update.

![Supplementary Documents](image)

**Figure 1**  **View 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: 0840661
Title: Collaborative Research: Gaming and Interactive Visualization for Education

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.

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[Print]

[Return to PI]

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**
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.

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: 0840661
Title: Collaborative Research: Gaming and Interactive Visualization for Education

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.

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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).

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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.

![Submitted screen.](image)

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
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.
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 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).
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).

3. Click Continuation Funding Status (Figure 2). The List of Awards screen displays (Figure 3) with a listing of awards.
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 3** List of Awards screen. The **View** button is circled.

**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.
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.

Access View/Print Award Documents

Access View/Print Award Documents

Access View/Print Awards Documents by role:

- As a PI
- As an SPO/AOR

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]

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).

![Research Administration screen](image)

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.)

![Award Documents screen](image)

Figure 2  Award Documents screen on the Active Awards tab.

You also have the option of viewing and printing award letters for expired awards (see View Award Documents for Expired Awards).
Search for Awards

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](image1.png)

**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](image2.png)

**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](image1.png)

**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](image2.png)

**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).

![Award Documents screen on the Active Awards tab. The award number is circled for an award.](image1)

**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.

![National Science Foundation screen. The View Print-Friendly Version link is circled.](image2)

**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.

![Award letter in print-friendly version.](image3)
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**

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).

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).

![Cooperative Agreement screen](image1)

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).
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.
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).

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.

View the Original and Amended Budgets
1. Access the Cooperative Agreement screen (Figure 1) (see View a Cooperative Agreement).
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.

View the Prior Award
Only PIs can view a prior award.

1. Access the Cooperative Agreement screen (Figure 1) (see View a Cooperative Agreement).
FastLane Help

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.

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).
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](#).

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
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 1** Award Documents screen on the Active Awards tab. The Expired Awards tab is circled.

**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.
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.

3. Click an amendment number (Figure 2). The National Science Foundation screen displays (Figure 3) 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).

**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](#)

**Prepare a Supplementary 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](image1.png) 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](image2.png) Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management

Award and Reporting Functions

- Notifications and Requests
- Continuation Funding Status
- View/Print Award Documents
- Project Reports System
- Supplemental Funding Request

Go Back
3. Click **Supplemental Funding Request** (Figure 2). The **List of Current Awards** screen displays (Figure 3).

![Figure 2 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Award and Reporting screen. The Supplemental Funding Request link is circled.](image)

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 3 List of Current Awards screen. The Prepare Supplemental Funding Request button is circled.](image)

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.](image)

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).
Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management

Award and Reporting Functions

- Notifications and Requests
- Continuation Funding Status
- View/Print Award Documents
- Project Reports System
- **Supplemental Funding Request**
- Research.gov Functions

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).
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).

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).
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).
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).

3. Click **Supplemental Funding Request** (Figure 2). The **List of Current Awards** screen displays (Figure 3).
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).

![Request for Supplemental Funding](image1)

**Figure 3** List of Current Awards screen. The Prepare Supplemental Funding Request 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.)

![Sponsored Project Office (SPO) Access Control](image2)

**Figure 4** Supplemental Funding Request screen. The Allow SPO Access button is circled.

**Figure 5** Sponsored Project Office (SPO) Access Control screen.
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).

**Principal Investigator(PI)/Co-Principal Investigator(Co-PI) Management**

What Do You Want To Work On?

- Proposal Functions
- Award And Reporting Functions
- Change PI Information
- Research.gov Functions

![Figure 1](principal_ investigator_management_screen.png)

* 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).

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).
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 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](image)

**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](image)

**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.
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).

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.

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).
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 1 Sponsored Project Office (SPO) Access Control screen.](image)

**Figure 1** Sponsored Project Office (SPO) Access Control screen.

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.](image)
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).

**Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management**

**Award and Reporting Functions**

- Notifications and Requests
- Continuation Funding Status
- View/Print Award Documents
- Project Reports System
- **Supplemental Funding Request**
- Research.gov Functions

![Figure 2](image)

**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).

**List of Current Awards**

<table>
<thead>
<tr>
<th>Principal Investigator Name: Alan Alphaman</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department: Division of Information System</td>
</tr>
<tr>
<td>Institution: National Science Foundation</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Awl ID</th>
<th>Inst ID</th>
<th>Exp. Date</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>0413531</td>
<td>4106352000</td>
<td>08/01/2004</td>
<td>SBIR supplemental funding request</td>
</tr>
<tr>
<td>0700000</td>
<td>0019893001</td>
<td>04/30/2002</td>
<td>Doctoral Dissertation Research: The Great</td>
</tr>
</tbody>
</table>

![Figure 3](image)

**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).

![Request for Supplemental Funding](image)

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).

![Print Menu](image)

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).

Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management

What Do You Want To Work On?

- Proposal Functions
- Award And Reporting Functions
- Change PI Information
- Research.gov Functions
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).

---

**Principal Investigator(PI)/Co-Principal Investigator(Co-PI) Management**

**Award and Reporting Functions**

- **Notifications and Requests**
- **Continuation Funding Status**
- **View/Print Award Documents**
- **Project Reports System**
- **Supplemental Funding Request**
- **Research.gov Functions**

---

3. Click **Supplemental Funding Request** (Figure 2). The **List of Current Awards** screen displays (Figure 3).
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).

![Request for Supplemental Funding](image)

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.

![Delete confirmation](image)

8. Click the **OK** button (Figure 5). A screen displays (Figure 6) with a message that the Supplemental Funding Request has been deleted.

![Delete confirmation message](image)

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](image1.png)

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](image2.png)

Figure 2 Proposals/Supplements/File Updates/Withdrawals screen on the Documents in Progress
FastLane Help

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).

![Research Administration screen](image)

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.
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)**

Check a Supplementary 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).
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.](image)

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.](image)

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
FastLane Help

- **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**.

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).
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).

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).
3. In the Organization Information section of the Proposal Errors/Warnings screen (Figure 4), check the accuracy of the information for your organization.

4. 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.
FastLane Help

**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 Withdrawal 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.
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.

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 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.

![Form Preparation screen. The Go button for Summary of Proposed Work is circled.](image)

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)

![Summary of Proposed Work screen. The Save Text button is circled.](image)

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
FastLane Help

- **Upload a New Summary of Proposed Work** (This option automatically replaces the already uploaded file.)

![Summary of Proposed Work](image)

**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 redispalyes 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](#)).
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.

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).
2. On the **Form Preparation** screen (Figure 1), click the **Go** button for Add/Delete Non-Co-Principal Investigator (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-Principal Investigator (Co-PI) Senior Personnel for instructions on completing the form.

---

**Figure 1**  
Form Preparation screen. The Go button for Add/Delete Non-Co-PI Senior Personnel is circled.

**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](image-url)  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.
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.

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).
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

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.

Data for Other Supplementary Docs form saved. [OK]

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.

![Other Supplementary Docs screen](image)

**Figure 4** Other Supplementary Docs screen. The Transfer File button is circled.

![Supplementary Documents File Upload screen](image)

**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.
FastLane Help

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).

**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**

![FastLane Home Page screen. The Proposals, Awards, and Status link is circled. PIs, Co-PIs, and Other Authorized Users work in this module.](image)

**Principal Investigator Functions Introduction**

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- 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.

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
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).

   ![Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management](image)

   **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).
Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management

Proposal Functions

- Letters of Intent
- Proposal Preparation
- Proposal Status
- Revise Submitted Proposal Budget
- Proposal File Update
- Research.gov Functions

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 the **Prepare Proposal** button (Figure 3). The Proposal Actions screen displays (Figure 4).
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).

7. Click the **Go** button for Cover Sheet (Figure 5). The **Cover Sheet Components Form** screen displays (Figure 6).
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).

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 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.

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.
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).

   Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management

   What Do You Want To Work On?

   Proposal Functions

   Award And Reporting Functions

   Change PI Information

   Research.gov Functions

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

- **Letters of Intent**
- **Proposal Preparation**
- **Proposal Status**
- **Revise Submitted Proposal Budget**
- **Proposal File Update**
- **Research.gov Functions**

**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).
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).
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).

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.

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.
FastLane Help

**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).

![FastLane Home Page](image)

**Figure 1** FastLane Home Page screen. The Proposals, Awards, and Status link 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).

Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management

What Do You Want To Work On?

- Proposal Functions
- Award And Reporting Functions
- Change PI Information
- Research.gov Functions
4. Click Proposal Functions (Figure 3). The Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Proposal Functions screen displays (Figure 4).

5. Click Proposal Preparation (Figure 4). The Principal Investigator (PI) Information screen displays (Figure 5).
6. Click the **Prepare Proposal** button (Figure 5). The **Proposal Actions** screen displays (Figure 6).

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).
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](image)

**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](image)

**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](image)

**Figure 11** Lower portion of the Remainder of the Cover Sheet screen. The OK button is circled.
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).
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).
4. Click Proposal Functions (Figure 3). The Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Proposal Functions screen displays (Figure 4).

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).
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).

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.

12. Click the **OK** button (Figure 9). A screen displays (Figure 10) confirming that the Senior Person has been removed from the proposal.

```
All data for Thomas Jackman deleted from proposal 9007744
```

13. Click the **OK** button (Figure 10). A screen displays (Figure 11) confirming 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).
FastLane Help

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.](image)

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.](image)

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.](image)

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).

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).

![Cover Sheet Components Form Screen](image)

**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).

![Remainder of the Cover Sheet Screen](image)

**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.

<table>
<thead>
<tr>
<th>Name</th>
<th>Enter the co-PI's NSF ID (000h#####) or primary registered email address (<a href="mailto:abc@xyz.gov">abc@xyz.gov</a>) to add a co-PI</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>NSF ID/Email <a href="mailto:gblock@nsf.gov">gblock@nsf.gov</a> Enter NSF ID or email address to add a co-PI</td>
</tr>
<tr>
<td></td>
<td>NSF ID Email Enter NSF ID or email address to add a co-PI</td>
</tr>
<tr>
<td></td>
<td>NSF ID Email Enter NSF ID or email address to add a co-PI</td>
</tr>
<tr>
<td></td>
<td>NSF ID Email Enter NSF ID or email address to add a co-PI</td>
</tr>
</tbody>
</table>

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.

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.
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.

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<table>
<thead>
<tr>
<th>Name</th>
<th>Enter the co-PI's NSF ID (000-1234) or primary registered email address (<a href="mailto:abc@xyz.gov">abc@xyz.gov</a>) to add a co-PI</th>
</tr>
</thead>
<tbody>
<tr>
<td>Greg Block</td>
<td>□ (Check to remove Greg Block as a co-PI)</td>
</tr>
<tr>
<td>NSID Email</td>
<td>Enter NSF ID or email address to add a co-PI</td>
</tr>
<tr>
<td>NSID Email</td>
<td>Enter NSF ID or email address to add a co-PI</td>
</tr>
<tr>
<td>NSID Email</td>
<td>Enter NSF ID or email address to add a co-PI</td>
</tr>
</tbody>
</table>

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.

Your CoverSheet has been saved

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).
FastLane Help

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.](image)

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.](image)

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.](image)
6. Click the Edit/View LOI tab (Figure 5). The Letters of Intent screen displays on the Edit/View LOI tab (Figure 6).

![Letters of Intent screen on the Edit/View LOI tab.](image)

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).

![Edit LOI screen. The Add/Edit Personnel button is circled.](image)

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

![Edit LOI—Add/Edit Other Senior Personnel screen. The Add to List button is circled.](image)

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.
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.
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).

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.

   ![Budget Personnel screen](image)

   **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 12**  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.
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 13  Screen with the message that the Senior Person has been removed.
FastLane Help

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).

4. Click Proposal Functions (Figure 3). The Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Proposal Functions screen displays (Figure 4).
5. Click **Revise** Submitted Proposal Budget (Figure 4). The **List of Proposals** screen displays (Figure 5).

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).

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**

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](image)

   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](image)

   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](image)

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

![Image of Proposal Functions]

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).

![Image of Principal Investigator (PI) Information]

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).
7. Highlight the number of the proposal (Figure 6) that you want to create a PIN for.
8. Click the **Proposal PIN** button (Figure 6). The **Proposal PIN Control** screen displays (Figure 7).

![Proposal PIN control for 6480899](image)

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.

![PIN changed for proposal 6480899](image)

**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:
FastLane Help

- **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**

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- **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).
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).

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).
5. Click **Notifications and Requests** (Figure 4). The **Notifications and Requests** screen displays (Figure 5).

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).
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.

![Budget Personnel screen](image)

**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.

   ![Add/Delete Non-Co-Principal Investigator (Co-PI) Senior Personnel Assigned to Proposal screen](image)

   **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.

   ![Screen with a message for you to confirm that you want to remove the Senior Person.](image)

   **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.

   ![Screen with the message that the Senior Person has been removed.](image)

   **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).
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.
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).
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).

Principle Investigator(PI)/Co-Principal Investigator(Co-PI) Management

What Do You Want To Work On?

- Proposal Functions
- Award And Reporting Functions
- Change PI Information
- Research.gov Functions

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).
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).

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).
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 7](image7.png)

**Figure 7**  Form Preparation screen. The Add/Delete Non-Co-PI Senior Personnel 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.

![Figure 8](image8.png)

**Figure 8**  Add/Delete Non-Co-Principal Investigator (Co-PI) Senior Personnel Assigned to Proposal screen.
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.

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.
3. Click the **OK** button (Figure 11). A screen displays (Figure 12) confirming that the Senior Person has been removed.

**Figure 11** Screen with the message for you to confirm that you want to delete the Senior Person. The OK button is circled.

**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.

**Access the Edit Principal Investigator's (PI) Demographic Information Screen**

To change your PI demographic 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
FastLane Help

- Proposal Preparation

From the Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Screen

1. On the FastLane Home Page screen, click on Sign In to FastLane/Research.gov button to 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 Demographic Information link is circled.](image1)

2. Click Change PI Demographic Information (Figure 1). The Principal Investigator (PI) Information screen displays (Figure 2).

![Figure 2 Principal Investigator (PI) Information screen. The Edit PI Demographic Information button is circled.](image2)

3. Click the Edit PI Demographic Information button (Figure 2). The Edit Principal Investigator’s (PI) Information screen displays (Figure 3). See Edit PI Demographic Information for instructions for working on this screen.
Figure 3   Edit Principal Investigator’s (PI) Demographic Information screen.

From Proposal Preparation

1. On the FastLane Home Page screen, click on Sign In to FastLane/Research.gov button to 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).

2. Click Proposal Functions (Figure 4). The Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Proposal Functions screen displays (Figure 5).
3. Click **Proposal Preparation** (Figure 5). The **Principal Investigator (PI) Information** screen displays (Figure 6).

4. Click the **Edit PI Demographic Information** button (Figure 6). The **Edit Principal Investigator's (PI) Demographic Information** screen displays (Figure 7). See **Edit PI Information** for instructions for working on this 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 organization to conduct the proposed activities?

5. Are there adequate resources available to the PI (either at the home organization 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.
FastLane Help

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.\(^1\) 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:

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
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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 organization to conduct the proposed activities?

5. Are there adequate resources available to the PI (either at the home organization 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.

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.

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).
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
- Edit your information on file with NSF
- Add to or update your demographic information

Proposal Review

Proposal Review Orientation Video

NSF has created an orientation video to assist you in completing the proposal review process. If you have not watched this video in the last 12 months, please watch the video before starting the review process.

![Orientation video: The Art and Science of Reviewing Proposals](image1)

<table>
<thead>
<tr>
<th>Reviewer Information</th>
<th>Proposal Information</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Name</strong></td>
<td><strong>Proposal Number</strong></td>
</tr>
<tr>
<td>Dr. John Doe</td>
<td>2028763</td>
</tr>
<tr>
<td><strong>Address</strong></td>
<td><strong>Title</strong></td>
</tr>
<tr>
<td>Materials Science and Engineering Clemson University CLEMSON, SC 296340001</td>
<td>TEST-RAISE PFU WITH PO</td>
</tr>
<tr>
<td><strong>E-Mail</strong></td>
<td><strong>Principal Investigator's Name</strong></td>
</tr>
<tr>
<td><a href="mailto:Jdoe@clemson.edu">Jdoe@clemson.edu</a></td>
<td>Alan Alphaman</td>
</tr>
<tr>
<td><strong>Office Phone</strong></td>
<td><strong>Institution</strong></td>
</tr>
<tr>
<td></td>
<td>Michigan State University</td>
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</table>

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<tr>
<td><strong>Disability</strong></td>
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</tr>
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</table>

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. Each criterion is to be given full consideration during the review and decision making processes, yet each criterion is necessary but not the sole determinant. For each criterion, if applicable, provide comments with respect to any additional solicitation-specific 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 to both 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:

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1. What is the potential for the proposed activity to:
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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 collaborating) to carry out the proposed activities?

Figure 4  Merit Review Criteria section of the Proposal Review screen.

Your Potential Conflicts Of Interest

If you have an affiliation or financial connection with the organization or person submitting this proposal that might be construed as creating a conflict of interest, please describe those affiliations or interests in the Conflict of Interest Section under "Prepare Review." Regardless of any such affiliations or interests, we would like to have your review unless you believe you cannot be objective. An NSF program official will examine any statement of affiliations or interests for the existence of conflicts. If you do not attach a statement we shall assume that you have no conflicting affiliations or interests.

Figure 5  Your Potential Conflicts of Interest section of the Proposal Review 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 Proposal Review screen.

Figure 7  Privacy Act and Public Burden Statements section of the Proposal Review screen.
Log In to Proposal Review

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Figure 3 Proposal Review screen, Reviewer and Proposal Information section (upper portion of the screen).
**Merit Review Criteria**

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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 from the project's success. 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:

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**Figure 4** Merit Review Criteria section of the Proposal Review screen.

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**Figure 5** Your Potential Conflicts of Interest section of the Proposal Review screen.

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Prepare a Proposal Review

1. Access the Proposal Review screen (Figure 1) (see Log In to Proposal Review).
2. On the Proposal Review screen (Figure 1), click Proposal Review. The Merit Review Criteria screen displays (Figure 2).

3. Click the Continue button at the bottom of the Merit Review Criteria screen. The Proposal Review Form screen displays (Figure 3).
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.](image)

   ![Figure 5 Receipt of Proposal Review screen. The Return button is circled.](image)

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).

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).

2. On the Proposal Review screen (Figure 1), click Proposal Review. The Merit Review Criteria screen displays (Figure 2).
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**.

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**Figure 2**  **Merit Review Criteria** screen.

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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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Edit Your Information with NSF

1. Access the Proposal Review screen (Figure 1) (see Log In to Proposal Review).
2. On the Proposal Review screen (Figure 1), click the Edit button. The Reviewer’s Information screen displays (Figure 2).
Reviewer's Information

Title: Professor Suffix: (Jr., Sr., III)
Last Name: Gleeson
First Name: Brian Middle Initial

Please fill only 4 lines from the following 6 lines
Department Line 1: 
Department Line 2: 
Institution Line 3: 
Institution Line 4: 
Building Line 5: 
Street Line 6: 444 Wilson Boulevard

Please check a radio button and enter either a US address or a Foreign address
- US Address
- Foreign Address

If you have checked US Address radio button then enter the US address
US City: Arlington
US State: Virginia
Zip: 22222

If you have checked Foreign Address radio button then enter the foreign address
Foreign City/Code: 
Foreign Country: 
(Overseas - Please do not include your country code)
Office Phone: 2223344444 (10 digits) Extension: 
Department Phone: (10 digits) Extension: 
Fax Number: 
Home Phone: 
E-Mail: name@nsf.gov
URL Address: 

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.
FastLane Help

**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](#)).

![Proposal Review screen](image)

**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.](image)

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.](image)
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).

![Proposal Review Functions](image)

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.
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.
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](#)).

2. On the **Proposal Review** screen (Figure 1), click **Download/Save Proposal**. The **Download File** window displays (Figure 2).
3. Click the **Save** button (Figure 2). The **Save As** window displays (Figure 3).

**Figure 2**   File Download 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).

**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.*)
Research Administration

Login for the following permission based functions:

- Accounts Management
- Letters of Intent
- Proposals/Supplements/File Updates/Withdrawals
- Award Documents
- Forwarded/Submitted Revised Budgets
- Notifications & Requests – Disabled in FastLane. Log in to Research.gov
- Organizational Reports
- Project Reports – Disabled in FastLane. Log in to Research.gov

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.

<table>
<thead>
<tr>
<th>User Permission Granted</th>
<th>Function Listed on Research Administration Screen</th>
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<tbody>
<tr>
<td>Add, Modify, and Delete</td>
<td>Accounts Management</td>
</tr>
<tr>
<td></td>
<td>(Within accounts management, you have access only to those functions for which you have permission.)</td>
</tr>
<tr>
<td>FastLane Users</td>
<td></td>
</tr>
<tr>
<td>Change User Permissions</td>
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<tr>
<td>Initialize User Passwords</td>
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<tr>
<td>Review/Revise Organizational Information</td>
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<tr>
<td>Financial Administrator</td>
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<tr>
<td>View Only</td>
<td>• Organizational Reports</td>
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<td>• View/Print Organization’s Award Letters</td>
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FastLane Help

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<tr>
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<td>• View/Edit Notifications To or Requests For NSF Approvals Under Grants</td>
<td>• View Project Reports</td>
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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).
2. In the **Login** section (Figure 2), Click on **Sign In to Fastlane/Research.gov** button,

3. You will be redirected to Research.gov Sign In page. Type in the boxes the following information:
   - **NSF ID**
     Your National Science Foundation Identification number
   - **Password**
     Click the **Sign In** button.

4. The Research.gov My Desktop page will be displayed. Click on **Research Administration** link under NSF FastLane Services.

5. The Research Administration page will be displayed.

6. Click on a function link (Figure 2) to go to that function in Research Administration:
   - **Accounts Management**
FastLane Help

- **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.

![Research Administration Screen](image)

**Figure 3** Research Administration screen. The In Box, with the number of documents waiting for attention by function category, is circled.

**Revise Organization Information**

**Note:** If you need to change the name of your organization, see [Change Organization Name](#) for instructions.
FastLane Help

Figure 1 Accounts Management screen on the User Account tab. The Organization Information tab is circled.

1. 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.

2. In the boxes (Figure 2), revise the information as you require.
3. Click the Submit Changes button (Figure 2). The Revise Information screen displays (Figure 3) again with the revised organization information.
4. Click the **Confirm Changes** button (Figure 3). The **Confirmation** screen displays (Figure 4) with a message that the organization information has been revised.

5. 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](#)).
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).

3. Click **Request Change of Organization Name** (Figure 2). The **Request Change of Organization Name** screen displays (Figure 3).
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 3  Request Change of Organization Name screen. The Submit Request button 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:

- **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.

### Access Organizational Reports

1. Access the **Research Administration** screen (Figure 1) (see [Log In to SPO Functions](#)).

   ![Research Administration screen](image)

   **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).
1. In the Select Organization Name drop-down list (Figure 2), select the organization whose reports you want to view.
2. In the Indicate Report Type section (Figure 2), you have options to view the following:
   - Active awards listing
   - Continuing Grant Increments
   - Organizational Permissions Report
   (Click on a link above for instructions for that option.)

**View Active Awards**
1. Access the Organizational Reports screen (Figure 1) (see Access Organizational Reports).

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).
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.

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.
View Continuing Grant Increments

1. Access the Organizational Reports screen (Figure 1) (see Access Organizational Reports).

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).
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.

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).
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

![Organization Permissions Report screen](image)

**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 screen](image)

**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.
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.
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.

AOR Functions

Authorized Organizational Representative Functions

Introduction

What Is an Authorized Organizational Representative?

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, you can request for the role in Research.gov Account Management system Once granted 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
- All Notifications and Requests submitted to NSF

**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).
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](image1.png)

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](image2.png)

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.
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).
14. Click **Authorized Organizational Representative Functions** (Figure 8). The **Authorized Organizational Representative Functions screen** displays (Figure 1).

**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](#).
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
- Interactive Panel System

Log In to Panelist Functions

1. On the FastLane Home Page screen (Figure 1), select Panelist Functions in the navigation bar at the top.
FastLane Help

The Panelist Functions screen displays (Figure 2).

Figure 1 FastLane Home Page screen. The link for Panelist Functions 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

**Figure 3** Panelist System Selection screen, Reviewer and Proposal Information section (upper portion of the screen).

**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.
Figure 7  Privacy Act and Public Burden Statements section of the Panelist System Selection screen.

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).
Changing Your Password

1. Select the Change Password link from the upper-right navigation bar.

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).

3. Enter your Old/Temporary Password, your New Password, and Confirm your New Password.

NOTE: Password length must be between 6 and 20 characters.
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.

![Change Password Screen](image.png)

**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
- Organization Address
- Organization Phone No.
- Organization 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](http://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).
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](http://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).
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.** Please use only letters and numbers in the address fields, as entering special characters will delay payments.

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).

*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.** Please use only letters and numbers in the address fields, as entering special characters will delay payments.

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).
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).
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.

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:

- Watch the reviewer orientation video (if you have not watched in the last 12 months)
- Answer the participant registration questions.
- Confirm your Social Security Number (if you answered Yes to Question 1).
- Submit your personal contact and banking information. Please use only letters and numbers in the address fields, as entering special characters will delay payments.

(Click on a link for instructions for that action.)
• Watch the reviewer orientation video (if you have not watched in the last 12 months)
• Answer the participant registration questions.
• Confirm your Social Security Number (if you answered Yes to Question 1).
• Submit your personal contact and banking information. Please use only letters and numbers in the address fields, as entering special characters will delay payments.
  (Click on a link for instructions for that action.)

Watch Reviewer Orientation Video

1. Access the Travel and Reimbursement Main screen (Figure 1) (see Access the Travel and Reimbursement System).

   ![Travel and Reimbursement screen. Orientation video button is circled.](image)

2. If you have not watched the orientation video in the last 12 months, click on the button to view “The Art and Science of Reviewing Proposals.” A new window/tab will open.
3. Start the video by clicking the arrow/play button (Figure 2).
4. Enter your First name, Last name, and Email address in the boxes provided and click the Submit button to start watching the video.

5. Close the video window/tab after completing the quiz questions and return to the Travel and Reimbursement Main screen to complete the registration process.

Answer Participant Registration Questions

6. Access the Travel and Reimbursement Main screen (Figure 1) (see Access the Travel and Reimbursement System).

7. 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.

8. 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 institutions?
   - 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.

9. 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 through 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.

![Waiver of Payment Confirmation screen](image)

**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.”
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).

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 organization
   - A foreign address and a U.S. financial organization

*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).

![Reviewer Address History page](image)

*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.*
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 organization
- Foreign address and No U.S. financial organization
- Foreign address and U.S. financial organization

Complete Information for U.S. Address and U.S. Financial Organization

*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 organization (Figure 1) (see Answer Participant Registration Questions or Confirm Social Security Number).
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.

   NOTE: Please use only letters and numbers in the address fields, as entering special characters will delay payments. For example, use ‘Kings Highway’ instead of ‘King’s Highway’.

Figure 1  Personal Banking/Contact Information screen for a U.S. address and U.S. financial organization.
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).

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 redisplay (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 Organization

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 organization.

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.
   NOTE: Please use only letters and numbers in the address fields, as entering special characters will delay payments. For example, use ‘Kings Highway’ instead of ‘King’s Highway’.

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).
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 redisplay (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.

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 Organization**

*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 organization (Figure 1) (see **Answer Participant Registration Questions** or **Confirm Social Security Number**).
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.  
     NOTE: Please use only letters and numbers in the address fields, as entering special characters will delay payments. For example, use ‘Kings Highway’ instead of ‘King’s Highway’.

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 organization 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 organization.
   • In the Account Number box, type your account number at this organization.
   • 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).
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 redisplayed (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.

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 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

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).

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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

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).
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).
4. Select Travel and Reimbursement (Figure 3). The Travel and Reimbursement Main screen displays (Figure 4).

Figure 3  Travel and Reimbursement link at the bottom of the Panelist System Selection screen.

5. Select Travel Arrangements (Figure 4).

6. If you are a Non-Federal, Non-Local, Attending On-Site participant, the Travel Arrangements screen displays 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.

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 (see Access Travel Arrangements).

2. On the Travel Arrangements screen, select Email Reservation Request. The Email Reservation Request Form screen displays.

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, 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.
FastLane Help

- 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, 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, select the radio button for the mode that you prefer.

6. In the Departure Airport/Rail Station section, 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, 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.

8. In the Preferred Seating section, select the radio button for your preference (for air travel only).

9. In the Special Travel Needs section, type in the Comments box any special needs that you might have for travel. (NSF does not guarantee delivery.)

10. Select the Next button.

---

On-Line Reservation Form

This information will be sent to Select Travel and will be shared with the Transportation Security Administration (TSA).

TSA developed the Secure Flight program to enhance the security of domestic and international commercial air travel through the use of improved passenger identity matching. Travelers are required to provide additional information in advance in order to allow TSA to conduct checks to prevent boarding of passengers who present a risk to national security. For information on the Secure Flight policy, visit TSA's website on www.tsa.gov.

Enter all information and click "Submit" when complete. Required fields are preceded by an asterisk (*).

NOTE: Email the meeting contact, marsh interracialgroup@gmail.com, for assistance with making hotel arrangements, or contact the suggested hotel directly.

---

Transportation Security Administration (TSA) Traveler Information:

- Name: John Smith
- Date of Birth: 01/01/1980
- Gender: Male
- Redress Number: 123456789
- Passport Number: P12345678
- Passport Issuing Country: USA

Submit Cancel

The travel reservation is not yet submitted. Please enter all information and click "Submit" to send your travel reservation request to the TSA.

---

Figure 3 Transportation Security Administration (TSA) Traveler Information (for air travel only).

11. In the Transportation Security Administration (TSA) Traveler Information section of the Email Reservation Request Form 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).

12. Select OK. 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 (see [Access Travel Arrangements](#)).
2. On the **Travel Arrangements** screen, find the name and 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.

**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.
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/](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).

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).

![Travel and Reimbursement Main Screen](image)

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**

![Submit Expenses Screen](image)

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](image1.png) **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](image2.png) **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](image3.png) **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](image1.png)

**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](image2.png)

**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).
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

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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.

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](image)

**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.
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.
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 4 Meeting Sign-in Screen with NSF Purchased Commercial Air/Rail selected as answers to the Transportation Questions.
FastLane Help

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

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Panelists can do the following in the Panel Review System:

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- 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).

Click to work on:

- Travel and Reimbursement
- Meeting Sign-in
- Panel Review System
- Interactive Panel System

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).
Panel Review

Click on the Prepare Review tab to prepare/submit reviews, the View/Download tab to view/download proposals, or the Request Printed Proposal tab to request that a printed copy of the proposals be mailed to you.

**Prepare Review** | **View/Download Proposal** | **Proposal Print Request** | **Proposals on CD Request**

Highlight a proposal and click below one of the action buttons. To sort, click on the appropriate column header.

<table>
<thead>
<tr>
<th>Prop No.</th>
<th>PI Last Name</th>
<th>Reviewer Type</th>
<th>Last Modified</th>
<th>Submitted</th>
</tr>
</thead>
<tbody>
<tr>
<td>0617757</td>
<td>Harpp</td>
<td>Panelist</td>
<td>Not Yet Started</td>
<td>No</td>
</tr>
<tr>
<td>0618078</td>
<td>Feldmann</td>
<td>Panelist</td>
<td>Not Yet Started</td>
<td>No</td>
</tr>
<tr>
<td>0618219</td>
<td>Shuster</td>
<td>Panelist</td>
<td>Not Yet Started</td>
<td>No</td>
</tr>
<tr>
<td>0618232</td>
<td>Vengosh</td>
<td>Panelist</td>
<td>Not Yet Started</td>
<td>No</td>
</tr>
<tr>
<td>0618963</td>
<td>Jamieson</td>
<td>Panelist</td>
<td>Not Yet Started</td>
<td>No</td>
</tr>
<tr>
<td>0618992</td>
<td>Chen</td>
<td>Panelist</td>
<td>Not Yet Started</td>
<td>No</td>
</tr>
<tr>
<td>0619013</td>
<td>Poppeilers</td>
<td>Panelist</td>
<td>Not Yet Started</td>
<td>No</td>
</tr>
<tr>
<td>0619030</td>
<td>Harris</td>
<td>Panelist</td>
<td>Not Yet Started</td>
<td>No</td>
</tr>
<tr>
<td>0619044</td>
<td>Brugger</td>
<td>Panelist</td>
<td>Not Yet Started</td>
<td>No</td>
</tr>
</tbody>
</table>

**Total Proposals: 44**

**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).

Panel Review

Click on the Prepare Review tab to prepare/submit reviews, the View/Download tab to view/download proposals, or the Request Printed Proposal tab to request that a printed copy of the proposals be mailed to you.

<table>
<thead>
<tr>
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<td>Panelist</td>
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</tr>
<tr>
<td>0619044</td>
<td>Brugger</td>
<td>Panelist</td>
<td>Not Yet Started</td>
<td>No</td>
</tr>
</tbody>
</table>

**Total Proposals: 44**

**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).
After reviewing the proposal, prepare a Panel Review as follows, keeping in mind the review guidelines:

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).
6. Click the Prepare Review tab if 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.
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.
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).
18. Click the Return button on the Receipt of Panel Review screen (Figure 4).

**NOTE:** Once you have submitted a review it is no longer accessible from the Panel Review System.

**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).
6. Click the Prepare Review tab if 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).
9. Click the **Continue** button (Figure 3). The **Panel Review** screen displays (Figure 4).

---

**Warning Message**

To modify and resubmit the currently submitted review, press the Continue button

[Continue]  [Go Back]

---

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.
12. Click the **Resubmit Review** button (Figure 4). The **Receipt of Panel Review** screen displays.
13. Click the **Return** button (Figure 5).

**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. NSF.gov.

**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](http://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).

   ![Click to work on:]
   
   **Panel Review System** link at the bottom of the Panelist System Selection screen.

6. Click the **Prepare Review** tab if 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.

   ![Prepare Review]
   
   **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
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.

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.
• **My Work** (Figure 3) - displays your panel review work area.

**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

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- 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.

  ![Figure 1 Panel Status screen.](image)

  Click on one of the table heading links to sort the data by the selected column.

<table>
<thead>
<tr>
<th>Discuss Order</th>
<th>Proposal Number</th>
<th>Principal Investigator (PI)</th>
<th>Institution</th>
<th>Score</th>
<th>Review Ratings</th>
<th>Recommendation</th>
<th>Comments Last Updated By</th>
<th>Who Needs to Approve</th>
<th>Summary Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>1000001</td>
<td>Kay, Ken</td>
<td>Test Both Institution For USE Use Only</td>
<td>Not Assigned</td>
<td></td>
<td></td>
<td>Heffand, Dave</td>
<td>Heffand, Dave</td>
<td>Not Yet Started</td>
</tr>
<tr>
<td>2</td>
<td>1000001</td>
<td>QUAk, Edward</td>
<td>Test Both Institution For USE Use Only</td>
<td>Not Assigned</td>
<td></td>
<td></td>
<td>Heffand, Dave</td>
<td>Heffand, Dave</td>
<td>Not Yet Started</td>
</tr>
</tbody>
</table>

- **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.
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- **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

IPS Functions

Figure 1  My Work screen layout.
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
FastLane Help

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.

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](http://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](http://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.
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](http://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 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.
     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](http://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
FastLane Help

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](http://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](http://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.
FastLane Help

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.

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### 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 merit 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.
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).

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).
FastLane Help

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.
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).
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**

### 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).

2. On the Honorary Awards screen (Figure 1), click Alan T. Waterman Award. The Alan T. Waterman Award screen displays (Figure 2).

Figure 1 Honorary Awards screen. The Alan T. Waterman Award link is circled.

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.

![Figure 3 Award Selection Criteria screen.](image)

**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.](image)

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.
FastLane Help

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.
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).

2. On the Honorary Awards screen (Figure 1), click Alan T. Waterman Award. The Alan T. Waterman Award screen displays (Figure 2).
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.
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.

![Nomination Form Description](image)

**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).
6. Click the **View Award Criteria** button (Figure 5). The **Award Selection Criteria** screen displays (Figure 6).

![Figure 5](image)

Instructions for Preparing a Nomination screen. The View Award Criteria 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 6](image)

Award Selection Criteria screen. The Begin Nomination 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.
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
• Organization
• 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.
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.
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.](image)

2. Click the Submit button (Figure 1). The Confirm Award Nomination Submission screen displays (Figure 2).
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.
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**).
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 1 Nomination Form screen open to the References section. The Save button is circled.](image1)

![Figure 2 Nomination Form screen after the nomination has been saved.](image2)

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.](image3)
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).
Submit a Saved Nomination for the Alan T. Waterman Award

1. Access the Honorary Awards screen (Figure 1) (see Log In to Honorary Awards).

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).
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.
View an Entire Nomination for the Alan T. Waterman Award

1. Access the Honorary Awards screen (Figure 1) (see Log In to Honorary Awards).

2. On the Honorary Awards screen (Figure 1), click Alan T. Waterman Award. The Alan T. Waterman Award screen displays (Figure 2).

3. Click the nomination title (Figure 2). The Nomination Form screen displays (Figure 3).
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 Alan T. Waterman Award

1. Access the View Entire Nomination screen (Figure 1) (see View Entire Nomination).
2. On the View Entire Nomination screen (Figure 1), click View PDF. The nomination displays in PDF format in a new window (Figure 2).

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).
2. On the **Honorary Awards** screen (Figure 1), click **Alan T. Waterman Award**. The **Alan T. Waterman Award** screen displays (Figure 2).

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.
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

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).
FastLane Help

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).

![Image of Alan T. Waterman Award screen]

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).

![Image of Instructions for Preparing a Reference screen]

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.
5. Click the **Back** button (Figure 4). The **Instructions for Preparing a Reference** screen displays (Figure 5).

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.
9. In the **How long have you known 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 you 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).

![Reference Form screen. The Submit button is circled.](image)

2. On the **Reference Form** screen (Figure 1), click the **Submit** button. The **Confirm Award Reference Submission** screen displays (Figure 2).

![Confirm Award Reference Submission screen. The Confirm button is circled.](image)

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).
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**.

**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](image)

**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](image)

**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).
Submit a Saved Reference for the Alan T. Waterman Award

1. Access the Honorary Awards screen (Figure 1) (see Log In to Honorary Awards).

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.

3. Click the title of the reference (Figure 2). The Reference Form screen displays (Figure 3).
4. Click **View Saved Reference** (Figure 3). The **View Entire Reference** screen displays (Figure 4).

5. Click the **Submit** button (Figure 4). The **Confirm Award Reference Submission** screen displays (Figure 5).
6. Click the **Confirm** button (Figure 5). The **Confirmation** screen displays (Figure 6).

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**.

1. Access the **Honorary Awards** screen (Figure 1) (see **Log In to Honorary Awards**).
2. On the Honorary Awards screen (Figure 1), click Alan T. Waterman Award. The Alan T. Waterman Award screen displays (Figure 2).

3. Click the title of the reference (Figure 2). The Reference Form screen displays (Figure 3).

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).
2. On the View Entire Reference screen (Figure 1), click View PDF. The reference displays in PDF format in a new window (Figure 2).

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.

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).
2. On the Honorary Awards screen (Figure 1), click National Medal of Science. The National Medal of Science screen displays (Figure 2).

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 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 she is recognized for substantial impact in fields in addition to her/his discipline;

e. Whether 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:

Office of Integrative Activities
National Science Foundation
3451 Eisenhower Avenue
Alexandria, Virginia 22314 USA
Phone: 703-292-5500
Fax: 703-292-9940

*All nominations must be in accordance with the eligibility requirements stated above. All nominations, re-nominations, and references must be submitted no later than 11:59 PM Eastern Time, October 7, 2017.

Disclosure Statement: The information requested on this nomination is solicited under the authority of the NSF Act of 1950, as amended, and will be used and disclosed only to reviewers in connection with the selection of qualified applicants.

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).

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).
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:
FastLane Help

- 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.

![President National Medal of Science Recipients screen](image)

**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

**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

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).

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 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.
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).
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).
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.

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](image)

**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](image)

**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](image)

**Figure 10**  
Publications and Patents section 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.

![Nomination Form Screen](image-url)
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).

2. Click the Submit button (Figure 1). The Confirm Award Nomination Submission screen displays (Figure 2).
3. Click the **Confirm** button (Figure 2). The **Confirmation** screen displays (Figure 3) with the message that the nomination has been submitted.

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.
Edit a Saved Nomination for the National Medal of Science

1. Access the Honorary Awards screen (Figure 1) (see Log In to Honorary Awards).

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.
FastLane Help

The National Medal of Science is the Nation’s highest honor for scientists and engineers, and is presented annually by the President of the United States. It was established by the 86th Congress in 1959 as a Presidential Award to be given to individuals “deserving of special recognition by reason of their outstanding contributions to knowledge in the physical, biological, mathematical, or engineering sciences.” In 1980 Congress expanded this recognition to include the social and behavioral sciences. The Committee of 12 scientists and engineers is appointed by the President to evaluate the nominees for this Award.

Since its establishment, the National Medal of Science has been awarded to distinguished scientists and engineers whose careers span decades of research and development. There are numerous American scientists and engineers, many of them women and minorities, now reaching the point where their contributions are worthy of recognition. The Committee asks your assistance in identifying them.

Create a new nomination or a letter of support by selecting the tab above, or select an unsubmitted previously created document to continue your progress. You may also view the View Award Considerations.

Why this information is being requested.

The nomination period will be closed on Saturday, October 29, 2011 11:59 PM.

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.](image)

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.

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**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).
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.

3. Click the nomination title (Figure 3). The Nomination Form screen displays (Figure 3).
4. Click **View Saved Nomination** (Figure 3). The **View Entire Nomination** screen displays (Figure 4).
5. Click the **Submit** button (Figure 4). The **Confirm Award Nomination Submission** screen displays (Figure 5).
Figure 5  Confirn 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).
3. Click the nomination title (Figure 2). The **Nomination Form** screen displays (Figure 3).

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).
2. On the View Entire Nomination screen (Figure 1), click View PDF. The Nomination displays in PDF format in a new window (Figure 2).

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).
2. On the Honorary Awards screen (Figure 1), click National Medal of Science. The National Medal of Science screen displays (Figure 2).

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.
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

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](https://example.com).

1. Access the **Honorary Awards** screen (Figure 1) (see [Register for Honorary Awards](https://example.com) or [Log In to Honorary Awards](https://example.com)).

   ![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).
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.

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).

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).

3. Click the Confirm button (Figure 2). The Confirmation screen displays (Figure 3).

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.
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).

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.
FastLane Help

**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 Support (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).
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 1**  
*Letter of Support Form screen. The Save button is circled.*

**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).
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.

3. Click the title of the Letter of Support (Figure 2). The Letter of Support Form screen displays (Figure 3).
4. Click **View Saved Letter of Support** (Figure 3). The **View Entire Letter of Support** screen displays (Figure 4).

5. Click the **Submit** button (Figure 4). The **Confirm Award Letter of Support Submission** screen displays (Figure 5).
6. Click the **Confirm** button (Figure 5). The **Confirmation** screen displays (Figure 6).

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).
3. Click the title of the Letter of Support (Figure 2). The Letter of Support Form screen displays (Figure 3).

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).
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).

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).
Vannevar Bush Award

Vannevar Bush Award Introduction

The Vannevar 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).
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).
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.

That selection takes you to the Postdoctoral Fellowships and Other Programs screen (Figure 2).

Figure 1 FastLane Home Page. The Postdoctoral Fellowships and Other Programs menu selection is circled in red.
**NSF Postdoctoral Fellowships and Other Programs**

- I am an Applicant
- I am a Sponsoring Scientist
- I am a Letter Of Reference Writer
- Individual Registration
- PI/Co-Pi Login Page
- Available Programs

**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

<table>
<thead>
<tr>
<th>Application</th>
<th>Who</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>I am an Applicant</td>
<td>Applicant</td>
<td>Find the information on one of the postdoctoral</td>
</tr>
</tbody>
</table>
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:

https://fl.acpt.nsf.gov/servlet/fastlane.pdoc.DisplayProgramType

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.

**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.

![NSF Postdoctoral Research Fellowships and Other Programs](image)

**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
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

1. Select the GO button for Program Announcement. The program’s information screen displays (see Figure 3).
Mathematical Sciences Postdoctoral Research Fellowships (MSPRF)

CONTACTS

<table>
<thead>
<tr>
<th>Name</th>
<th>Email</th>
<th>Phone</th>
<th>Room</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lloyd E. Douglas</td>
<td><a href="mailto:ldouglas@nsf.gov">ldouglas@nsf.gov</a></td>
<td>(703) 292-4862</td>
<td>1025 N</td>
</tr>
</tbody>
</table>

PROGRAM GUIDELINES

03-519 Solicitation

DUE DATES

Full Proposal Deadline Date: October 18, 2006
Annually beginning in 2006

SYNOPSIS

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.

RELATED PROGRAMS

- International Research Fellowship Program

THIS PROGRAM IS PART OF:

- Training Programs

Abstracts of Recent Awards Made Through This Program
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.

8. 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.

9. 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.

8. Select the Proposal Functions link. The Proposal Functions screen displays (Figure 11).
Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management

Proposal Functions

- Letters of Intent
- Proposal Preparation
- Proposal Status
- Revise Submitted Proposal Budget
- Proposal File Update
- Research.gov Functions

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

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

8. 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."

9. 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.

10. 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 with information on that fellowship.

4. Select the GO button for How to Apply screen. A screen displays specific instructions for how to apply for that particular fellowship.

5. Note that the fourth step is Individual Registration. This will apply to all of the fellowships.

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.

3. Select the GO button of the program you are interested in viewing (e.g., Mathematical Sciences Postdoctoral Research Fellowships). A screen displays with information on that program.

Figure 1 List of NSF Postdoctoral Fellowships and Other Programs currently available.
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.

![Figure 1 A FastLane-generated email to a Letter of Reference Writer, with necessary login information.](image)

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.](image)
3. Select the GO button for I am a Letter of Reference Writer. The Letter of Reference login screen displays (Figure 3).

![Letter of Reference login screen](image)

Figure 3 Letter of Reference login screen.

2. 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).
3. Type in your new password (Figure 4). The next message verifies your email address (Figure 5).

4. Select the Yes button (Figure 5). The Letter of Reference Instructions screen displays (Figure 6).
Figure 6 Letter of Reference instructions screen. The Step 1 GO button is circled in red.

5. Select the GO button for Step 1 Rating (Figure 6). You may also wish to view the Program Information (Figure 7).
**Figure 7** Program information.
6. If you selected the Go button for Step 1, the Letter of Reference Rating Sheet screen displays.

7. Make sure your name and title information are correct (Figure 9).

Referee's Information

**Last Name:** Kieffer

**First Name:** Jody

**Middle Initial:**

**Title:**

**Figure 9** Referee's name and title information.

2. Make sure your institution name, department, and contact information are correct (Figure 10).

Referee's Institution

**Institution Name:** University of MI

**Department:** Journalism

**Phone:** 7037493855

**FAX:**

**e-Mail:** jkieffer@nsf.gov

**Figure 10** Referee's institution name and contact information.

3. Indicate how long you have known the applicant in years and months (Figure 11).

**How long have you known the Applicant?** 

4. 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.)

5. 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

6. 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.

7. 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

<table>
<thead>
<tr>
<th>Step</th>
<th>Component</th>
<th>Status</th>
<th>Step Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Rating</td>
<td>NOT SAVED</td>
<td>NOT DONE</td>
</tr>
<tr>
<td>2</td>
<td>Letter</td>
<td>NOT UPLOADED</td>
<td>NOT DONE</td>
</tr>
<tr>
<td>3</td>
<td>Reference</td>
<td>NOT SUBMITTED TO NSF YET!</td>
<td>NOT DONE</td>
</tr>
</tbody>
</table>

![Save button](Image)

**Figure 15** Select the Save button (circled in red) to complete the Rating

**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).
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).
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.
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.
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.
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.

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).

![Figure 2 The Past Award Winners page displays](image-url)
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.

<table>
<thead>
<tr>
<th>Application</th>
<th>Who</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prepare Review</td>
<td>Proposal Reviewer</td>
<td>Complete and submit the form for review of a proposal.</td>
</tr>
<tr>
<td>Download/Save Proposal</td>
<td></td>
<td>Download and save a proposal to your PC for reference.</td>
</tr>
<tr>
<td>View Proposal</td>
<td></td>
<td>View a proposal online in PDF format.</td>
</tr>
<tr>
<td>Edit Reviewer</td>
<td></td>
<td>Change your profile information that NSF has on file.</td>
</tr>
<tr>
<td>Information</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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

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 for FastLane

<table>
<thead>
<tr>
<th>Extension</th>
<th>File Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>.docx, .doc</td>
<td>Microsoft Word 2007 or older version</td>
</tr>
<tr>
<td>.xlsx, .xls</td>
<td>Microsoft Excel 2007 or older version workbook (single worksheet only)</td>
</tr>
<tr>
<td>.pptx, .ppt</td>
<td>Microsoft PowerPoint 2007 or older version presentation</td>
</tr>
<tr>
<td>.pdf</td>
<td>Fastlane supports and uses Adobe Acrobat Distiller Version 9.0</td>
</tr>
<tr>
<td>.eps</td>
<td>Encapsulated PostScript file</td>
</tr>
<tr>
<td>.ps</td>
<td>PostScript file</td>
</tr>
</tbody>
</table>
## FastLane Help

<table>
<thead>
<tr>
<th>File Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>.rtf</td>
<td>Rich Text Format</td>
</tr>
<tr>
<td>.txt</td>
<td>Text file</td>
</tr>
</tbody>
</table>
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.

<table>
<thead>
<tr>
<th>Image</th>
<th>Code</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="flimg1.gif" alt="Go to FastLane" /></td>
<td><code>&lt;a href=&quot;http://www.fastlane.nsf.gov/&quot;&gt; &lt;img src=&quot;flimg1.gif&quot; width=&quot;82&quot; height=&quot;48&quot; border=&quot;0&quot; alt=&quot;Go to FastLane&quot;&gt;&lt;/a&gt;</code></td>
</tr>
<tr>
<td><img src="flimg2.gif" alt="Go to FastLane" /></td>
<td><code>&lt;a href=&quot;http://www.fastlane.nsf.gov/&quot;&gt; &lt;img src=&quot;flimg2.gif&quot; width=&quot;115&quot; height=&quot;31&quot; border=&quot;0&quot; alt=&quot;Go to FastLane&quot;&gt;&lt;/a&gt;</code></td>
</tr>
<tr>
<td>Go to FastLane (Text link)</td>
<td><code>&lt;a href=&quot;http://www.fastlane.nsf.gov/&quot;&gt; Go to FastLane &lt;/a&gt;</code></td>
</tr>
</tbody>
</table>

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](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®
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](http://www.planetpdf.com/planetpdf/pdfs/issue02.pdf)

**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.
**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.

<table>
<thead>
<tr>
<th>Operating System</th>
<th>Browser</th>
<th>URL</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>or AOL</td>
<td></td>
</tr>
</tbody>
</table>

**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).

   **PDF Conversion/Compliance Check**

   Please be patient, this process may take a few minutes.

   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.

   **Figure 4** PDF Conversion/Compliance Check screen. This screen continues to refresh until the upload is completed.

   **File Successfully Converted/Checked**

   **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, and other special formatting options have been accurately preserved.

   **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 submission.

   **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.

   **Proofreading Complete**

   **Do You Accept The Results?**

   If you accept the results, click on the "Accept" button below.

   However, if you detected any problems in the PDF file, you can cancel the upload by clicking on the "Cancel" button below. You may then correct the errors in the corrected version of your document.

   **NOTE:** Clicking the "Cancel" button will create a NEW window to display a verification message.

   After verifying the cancellation, close the new window to continue your work.

   **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).

Upload Cancelled

Action Cancelled By User
Your file was NOT uploaded because you cancelled the action. Close this window to continue your work.

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 on updating your Internet Explorer, go to the [Microsoft Update Site](https://www.microsoft.com/en-us/microsoft-update).

- **Mozilla Firefox**
  For information on downloading Firefox, go to the [Download Firefox Site](https://www.mozilla.org/en-US/firefox/).  

The table below shows best practices when using Internet Explorer, on Windows XP or 7 while accessing FastLane.

<table>
<thead>
<tr>
<th>Browser Version</th>
<th>Issue</th>
<th>Best Practice</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internet Explorer 5.9–5.5</td>
<td>PDF documents may not display properly in the Internet Explorer web</td>
<td>1. Disable Web browser integration in Acrobat</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2. Uncheck the &quot;Display PDF&quot;</td>
</tr>
</tbody>
</table>
FastLane Help

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.

<table>
<thead>
<tr>
<th>Browser</th>
<th>Issue</th>
<th>Recommendation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Omni Web browser</td>
<td>This web browser is incompatible with FastLane</td>
<td>Download and use the latest version of Firefox, Internet Explorer 8.0 or Safari 5.0.</td>
</tr>
<tr>
<td>Internet Explorer for Macs</td>
<td>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.</td>
<td>Download and use Safari 5.0, or Firefox 17.0.</td>
</tr>
</tbody>
</table>

FastLane Accessibility Software Support

If you are using accessibility software, then the following combinations work best when using FastLane:

• JAWS 12.0:
  o With Windows XP running Internet Explorer 8.0
  o With Windows XP running Firefox 17.0

• Dragon 11.5:
  o With Windows XP running Internet Explorer 8.0
  o 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.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Select and upload the file.</td>
<td>The File Upload window will open.</td>
</tr>
<tr>
<td></td>
<td>On any of the forms that allow file uploads, click on the browse button.</td>
<td>The File Upload window will open.</td>
</tr>
<tr>
<td></td>
<td><strong>Browse...</strong></td>
<td>The File Upload window will open.</td>
</tr>
<tr>
<td>2</td>
<td>From the File Upload window, select the file you wish to upload and click on the open button.</td>
<td>The File Upload window will close and the file you selected will be shown in the text box.</td>
</tr>
<tr>
<td></td>
<td><strong>Open</strong></td>
<td>C:\My Documents$Training Inte</td>
</tr>
<tr>
<td></td>
<td><strong>Browse...</strong></td>
<td>Upload File</td>
</tr>
<tr>
<td>3</td>
<td>Click on the</td>
<td>The file will be uploaded. A new screen will appear</td>
</tr>
</tbody>
</table>
Proofread the Document

To proofread the uploaded document, follow the steps listed below.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Click on the Proofread PDF button.</td>
<td>A new browser window will open and display your converted document</td>
</tr>
<tr>
<td>2</td>
<td>Proofread the document. When finished, close the new browser window.</td>
<td>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).</td>
</tr>
</tbody>
</table>

Publish Or Resubmit

To publish or resubmit the uploaded document, follow the steps listed below.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>If there were no errors, click on the Publish button.</td>
<td>Your document will be published and you will be returned to the beginning upload screen.</td>
</tr>
<tr>
<td>2</td>
<td>If there were errors, click on the Cancel button.</td>
<td>Your document will NOT be published and you will be returned to the beginning upload screen.</td>
</tr>
</tbody>
</table>

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:
FastLane Help

- 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](#).

**Generate PDF Files Introduction**

[Print the contents of the Generate PDF Files book.](#)

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- The PDF format help ensure that the file appears as the author intends
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**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**.

**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](#).
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.


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

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 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

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 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

For the most up to date information about NSF’s Security and Privacy policies and practices, please visit NSF’s Privacy Policy page at www.nsf.gov/policies/privacy.jsp.

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.

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
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
FastLane Help

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.

Accessing FastLane FAQs

**How does a Co-PI access the proposal?**

I have an assistant who will be doing work on a proposal or report. How do I give my assistant access?

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.

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:

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.

Give the PIN to your assistant.

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

What is an Authorized Organizational Representative (AOR)?

What if our organization has multiple individuals that we wish to designate as AORs?

With implementation of the electronic signature process, are all pre- and post-award actions able to be done electronically?

How and when will the AOR be notified if there is a proposal waiting to be electronically signed?

Can an AOR electronically sign a proposal that is in process before submission of the proposal?

How long after submission does the AOR have to electronically sign the proposal?

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?

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?

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.

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.

With implementation of the electronic signature process, are all pre- and post-award actions able to be done electronically?

Yes.

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).

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.

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.

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.

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.

Interactive Panel System FAQs

What is the difference between the Lead Panelist and the Scribe?
How do I enter a Panel Summary?
How do I Print a Panel Summary?
How do I view/approve a Panel Summary?
How do I prepare reviews?
How do I view the reviews of the other panelists?
How do I rank the proposals?
Why is the text format in the Panel Summary window inconsistent?
How can I refresh my Panel Summary window without being redirected to the Panel Status page?
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?

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.

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.

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.

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.

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.

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.

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-down 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.

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.

**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.

**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

**How do I complete a subaward budget?**
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?
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?
**How will my Sponsored Project Office (SPO) know when I have allowed SPO access to the proposal?**
Are signed budgets still required when submitting Supplemental Funding Requests?
**How will subawardee signatures be handled in the e-signature process?**

**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?](#)

**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.”

**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)."

**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

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.

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.

**Principal Investigator (PI) Functions FAQs**

**With implementation of the electronic signature process, are all pre- and post-award actions able to be done electronically?**

Can you print out the PI/Co-PI Information form?

Yes. Do the following:

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.

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](#).)

Click the Print icon in the upper-left of the screen. The PI/Co-PI Information Form prints.

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:
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.

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.

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.

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.

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.

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.

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.

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:

**Assign a proposal PIN** if your assistant needs to work on a proposal.

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.

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## Proposal Preparation FAQs

- **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.

- **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.

- **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."

  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 [Proposal & Award Policies & Procedures Guide (PAPPG)](https) 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)."

- **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.

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

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).

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 (PAPPG 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

Project reports have been migrated to Research.gov

Sponsored Project Office Representative (SPO)/Authorized Organizational Representative (AOR) Functions FAQs

With implementation of the electronic signature process, are all pre- and post-award actions able to be done electronically?
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?

How will I know that the PI has given me access to a proposal?

How does the organizational administrator make required changes to a FastLane proposal once the PI allows SPO access?

How do I know NSF has successfully received my FastLane proposal?

After the proposal was submitted, I go into the Check Proposal Status application and the proposal is not listed. What is happening?

At what point does NSF consider a proposal to be submitted?

What if our organization has multiple individuals that we wish to designate as AORs?

How will subawardee signatures be handled in the e-signature process?

With implementation of the electronic signature process, are all pre- and post-award actions able to be done electronically?

Yes.

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.

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

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).

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.
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 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 database that night for access by the PI and SPO.

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.

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.

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.
Printing
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?
When NSF prints the proposals, do they print the proposal in color?
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?
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?
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?
Can you print out the PI/Co-PI Information Form?
How do I print a copy of my completed report?

Proposal Preparation
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?
Why is the Information Form not accepting my answers for the gender, ethnicity, and disability questions?

Technical FAQs – General

What software do I need to use the FastLane Proposal Preparation application?
Which file formats, besides PDF, are now supported by FastLane?
How do I exit the FastLane Proposal Preparation application?
I get a security library error message. What should I do?
What security is provided with FastLane?
I cannot enter data in a FastLane field. It stops me from entering the last character. What should I do?
Should I keep on hitting a button if I do not get a quick response?

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.

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,
FastLane Help

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.

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.

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.

What security is provided with FastLane?

FastLane uses a Secure Server (https). All of your transactions with FastLane are encrypted.

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:
  Put your cursor in the field.
  Space all the way to the right.
  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.

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

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?

When NSF prints the proposals, do they print the proposal in color?

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?

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?
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?

Can you print out the PI/Co-PI Information Form?

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.

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.

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.

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:
Set the default page size in the Job Options section of Adobe Distiller.
Correct the default page size.
Convert the file to PDF.

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.

Can you print out the PI/Co-PI Information Form?

Yes. Do the following:
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.
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](#).) Click the **Print** icon in the upper-left of the screen. The PI/Co-PI Information Form prints.

### Technical FAQs – Proposal Preparation

**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?**

**Why is the Information Form not accepting my answers for the gender, ethnicity, and disability questions?**

**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?**

There is a lag between the time the proposal is submitted via FastLane and the time it shows up in the 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 e-mail 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 database that night for access by the PI and SPO/AOR.

**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.