FastLane Help
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Postdoctoral Fellowships and Other Programs

NSF Postdoctoral Fellowships and Other Programs

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How to Apply (for Applicants)

How to Apply (for Sponsoring Scientists)

Write a Letter of Reference

View Past Award Winners

Postdoctoral Fellowship Contacts

Technical Help Introduction

Acceptable Formats for FastLane

Recommended Formats for FastLane

Add a Link to FastLane

Adobe Reader for FastLane

Blocked PDF Producers

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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).

![Figure 1](FastLaneHome Page screen. The links to FastLane’s modules are circled.)

FastLane modules are:
- Proposals, Awards, and Status
- Proposal Review
- Panelist Functions
FastLane Help

- Research Administration
- Financial Functions
- Honorary Awards
- Graduate Research Fellowship Program
- Postdoctoral Fellowship and Other Programs

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

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

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

For the Researcher and Educator

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

For NSF Reviewers and Panelists

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

For Your Organization’s Sponsored Project Office

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

For Your Organization’s Business Office

- Request electronic funds transfers from NSF for an award
- Prepare and submit the required quarterly Financial Cash Transaction Report
For Your Organization’s Authorized Organizational Representative

Certify, sign, and submit letters of intent, proposals, proposal file updates, revised budgets and post-award requests
Withdraw a proposal that has already been submitted to NSF

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.

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<th>FastLane Application</th>
<th>Who</th>
<th>Activity</th>
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<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**

| Letters of Intent        | PI, Co-PI| • Prepare a Letter of Intent in response to an NSF solicitation.          |
|                         |          | • Forward a Letter of Intent to the AOR for submission.                    |
## Accessing Proposals, Awards, and Status

<table>
<thead>
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<th>Role</th>
<th>What You Need for Access</th>
<th>Registration Required?</th>
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<tr>
<td><strong>Principal Investigator (PI)</strong></td>
<td>• Registration with NSF as PI (see your SPO)</td>
<td>Yes</td>
</tr>
<tr>
<td><strong>Co-PI</strong></td>
<td>• Password</td>
<td></td>
</tr>
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</table>
Other Authorized User (OAU) | • Initial password from SPO  
| • Proposal ID from PI  
| • Proposal PIN from PI or  
| • Password  
| • Award Number from PI  
| • Award PIN from PI  

| Independent Researcher | Password | Yes, as independent researcher |

---

**Proposal Review**

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

Proposals are assigned to reviewers by an NSF Program Officer.

**Table 1 Proposal Review Applications**

<table>
<thead>
<tr>
<th>Application</th>
<th>Who</th>
<th>Activity</th>
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![Figure 1 Proposals, Awards, and Status Home Page screen.](image)
Proposal Review

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

Proposals are assigned to reviewers by an NSF Program Officer.

Table 1 Proposal Review Applications

See Accessing Proposal Review.

Accessing Proposal Review

<table>
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<th>Role</th>
<th>What You Need for Access</th>
<th>Registration Required?</th>
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<tr>
<td></td>
<td>• Proposal PIN from NSF Program Officer</td>
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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

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<th>Activity</th>
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<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</td>
<td></td>
<td>• Make travel arrangements to attend a meeting at NSF.</td>
</tr>
<tr>
<td>System</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

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. • 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 • Password from NSF</td>
<td>No</td>
</tr>
</tbody>
</table>
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 | Institutional Administrator and SPO and other users with permissions to carry out any one or more of these activities | - Register new users with NSF.  
- Set passwords.  
- Assign user permissions.  
- Assign Financial Administrator Permissions. |
| Letters of Intent | SPO/AOR and other users with permissions to carry out any one or more of these activities | - Prepare a Letter of Intent in response to an NSF solicitation.  
- Return a forwarded Letter of Intent to the PI. |
| Letters of Intent | AOR | Submit forwarded and SPO authored Letters of Intent to NSF |
| Proposals/File Updates/Supplements/Withdrawals | SPO/AOR and other users with permissions to carry out any one or more of these activities | - Edit forwarded proposals, Proposal File Updates, Supplemental Funding Requests, and Withdrawals.  
- Return forwarded documents to PI. |
| Proposals/File Updates/Supplements/Withdrawals | AOR | Electronically sign and submit and provide the required certifications for forwarded Proposals, Proposal File Updates, Supplemental Funding Requests and Withdrawals. |
| Award Documents | SPO/AOR and other users with permissions to carry out any one or more of these activities | View and print award documents, including cooperative agreements. |
| Forwarded/Submitted Revised Budgets | SPO/AOR and other users with permissions to carry out any one or more of these activities | - Edit forwarded revised budget to NSF.  
- Return a forwarded revised budget to PI |
| AOR | Electronically sign and submit and provide the required certifications for forwarded revised budgets to NSF |
### Notifications and Requests

<table>
<thead>
<tr>
<th>SPO/AOR and other users with permissions to carry out any one or more of these activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Prepare notifications and requests for changes in an award.</td>
</tr>
<tr>
<td>• Return forwarded requests to the PI. (See the Proposal &amp; Award Policies &amp; 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.)</td>
</tr>
</tbody>
</table>

#### AOR

| Electronically sign and submit, and provide the required certifications for notifications and requests for changes in an award |

### Organizational Reports

<table>
<thead>
<tr>
<th>SPO/AOR and other users with permissions to carry out any one or more of these activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>• View active awards documents.</td>
</tr>
<tr>
<td>• View the organization permissions report.</td>
</tr>
<tr>
<td>• View the list of submitted documents waiting for electronic signature.</td>
</tr>
<tr>
<td>• Check the status of recent proposals.</td>
</tr>
<tr>
<td>• Check continuation funding.</td>
</tr>
<tr>
<td>• Check submission of final project reports for an expired award.</td>
</tr>
</tbody>
</table>

---

**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>
</tbody>
</table>
Graduate Research Fellowship Program

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

Roles

The following persons work in the Graduate Research Fellowship Program:

- **Applicant**  
  Individual in graduate studies who is seeking a research grant from NSF

- **Letter of Reference Writer**  
  Individual who writes and submits a letter of reference for an applicant

- **Fellow**  
  Individual with a Graduate Research Fellowship who is now a Fellow

- **Coordinating Official**  
  University official who is assigned by the university via the SPO to manage the NSF Postgraduate fellows at the university

Table 1  Graduate Research Fellowship Program Applications

<table>
<thead>
<tr>
<th>Application</th>
<th>Who</th>
<th>Activity</th>
</tr>
</thead>
</table>
| Prepare Application     | Graduate Applicant   | • Apply for a Graduate Research Fellowship. Manage references.  
                        |                      | • Manage your user profile.                   |
| Coordinate Applicant Awards | Coordinating Official | • Prepare reports on graduate researcher activities.  
                        |                      | • Coordinate grant administration.            |
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Roles

The following persons work in the Graduate Research Fellowship Program:

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  Individual with a Graduate Research Fellowship who is now a Fellow
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<table>
<thead>
<tr>
<th>Application</th>
<th>Who</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prepare Application</td>
<td>Graduate Applicant</td>
<td>• Apply for a Graduate Research Fellowship. Manage references.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Manage your user profile.</td>
</tr>
<tr>
<td>Coordinate Applicant Awards</td>
<td>Coordinating Official</td>
<td>• Prepare reports on graduate researcher activities.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Coordinate grant administration.</td>
</tr>
</tbody>
</table>

Table 1  Graduate Research Fellowship Program Applications

Accessing the Graduate Research Fellowship Program

<table>
<thead>
<tr>
<th>Role</th>
<th>What You Need</th>
<th>Registration Required?</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Graduate Researcher</td>
<td>Registration on <a href="#">Graduate Research Fellowship Program</a> home page screen for login account and password</td>
<td>Registration only for Graduate Research Fellowship Program</td>
</tr>
<tr>
<td>• GRFP Official</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

---

[Graduate Research Fellowship Program](#)
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

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**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**
FastLane Help

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>
<thead>
<tr>
<th>Table 1 Postdoctoral Fellowship and Other Programs Applications</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Application</strong></td>
</tr>
<tr>
<td>I am an Applicant</td>
</tr>
<tr>
<td>I am a Sponsoring Scientist</td>
</tr>
<tr>
<td>Individual Registration</td>
</tr>
<tr>
<td>PI/Co-PI Login Page</td>
</tr>
<tr>
<td>Available Programs</td>
</tr>
<tr>
<td>Analysis of Available Programs</td>
</tr>
</tbody>
</table>

**Accessing Postdoctoral Fellowships and Other Programs**

<table>
<thead>
<tr>
<th>Role</th>
<th>What You Need</th>
<th>Registration Required?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Researcher Applicant</td>
<td>No password required, but 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>
</tbody>
</table>
Letter of Reference Writer | Initial password from applicant | No

---

**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.

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

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

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

**Proposal & Award Policies & Procedures Guide (PAPPG)**
The NSF Proposal & Award Policies & Procedures Guide (PAPPG) contains NSF’s proposal preparation and submission guidelines. Some NSF programs have program solicitations that modify the general provisions of the PAPPG, and, in such cases, the guidelines provided in the solicitation must be followed.

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

**Password**
A password is a 8-20 character authentication and access code used to log into PI/Co-PI Functions, Panelist Functions, Research Administration, Financial Functions, Honorary Awards, and the Graduate Research Fellowship Program.

**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.
FastLane Help

(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.)

<table>
<thead>
<tr>
<th>Role</th>
<th>What You Need for Access</th>
<th>Registration Required?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public User</td>
<td>Registration on Honorary Awards System Home Page screen for login account and password</td>
<td>Registration only for Honorary Awards</td>
</tr>
</tbody>
</table>

**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**

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

Log in to FastLane's Proposal System by role:
- PI and Co-PI Login
- Other Authorized User (OAU) Login
- SPO and AOR Login

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

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

![Figure 1](image-url)  
**Figure 1** FastLane Home Page screen. The Proposals, Awards, and Status link is circled.
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:
FastLane Help

- 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.

![Form Preparation screen for the proposal.](image)

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.
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).
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.](image)

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
Create a New Letter of Intent

Create a Letter of Intent Introduction

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

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

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](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).
3. Click **Letters of Intent** (Figure 2). The **Letters of Intent** screen displays on the **Create New LOI from Program Solicitation** tab (Figure 3) with a listing of the available solicitations. You have these options on this screen:

- **View all program solicitations**
- **Search for solicitations**
- **View a program solicitation**
- **Complete the Letter of Intent**

![Figure 2](image2.png)

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

![Figure 3](image3.png)

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

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](image)

**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](image)

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

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](http://www.nsf.gov/funding/research_edu_community.jsp) for a listing of NSF organizations.
   - Letter of Intent Due Date Range
     In the From box (Figure 1), type the start date for the date range. In the To box (Figure 1), type the end date for the date range.

3. Click the Search button (Figure 1). The Letters of Intent screen displays on the Create New LOI from Program Solicitation tab (Figure 2) with the results of your search listed in the Available Program Solicitations section.
Figure 1  Letters of Intent screen on the Create New LOI from Program Solicitation tab. The Program Solicitation ID is circled for a solicitation.

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).

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.

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

![Text of the solicitation in the new window.](Figure 3)

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.](image)

2. Determine which solicitation you want to create a Letter of Intent for (see Search for Solicitations, View All Program Solicitations, and View a Program Solicitation).

3. In the Available Program Solicitations section of the Letters of Intent screen on the Create New LOI from Program Solicitations tab (Figure 1), click Create on the row for the solicitation that you want to create a Letter of Intent for. The Create New LOI screen displays (Figure 2).
4. In the **Project Information** section, in the **Project Title** box (Figure 2), type the Project Title of the Letter of Intent.

5. In the **Synopsis** box (Figure 2), type or copy and paste a synopsis of the proposed project.

6. From the **Organizational Attribute** drop-down list (Figure 2), choose the organizational attribute (optional).

7. Type messages to any or all of the following (Figure 2):
   - NSF division, NIH Institute, NASA, or DOE for the primary assignment (optional)
   - NSF division, NIH Institute, NASA, or DOE for the second assignment (optional)
   - The Program Officer who has expressed interest in the project (optional)

8. In the **Point of Contact for NSF Inquiries** section (Figure 2), click the radio button for either of the following:
   - Use this user as point of contact (individual’s information is displayed already)
   - Use (alternate) name as point of contact

9. **If you use the alternate point of contact:**
   - In the **First Name** box (Figure 2), type the alternate’s first name.
   - In the **Middle Initial** box (Figure 2), type the alternate’s middle initial (optional).
   - In the **Last Name** box (Figure 2), type the alternate’s last name.
   - In the **Telephone Number** box (Figure 2), type the alternate’s telephone number.
   - In the **Email Address** box (Figure 2), type the alternate’s email address.

10. In the **Project PI** section (Figure 2), type the following:
    - In the **First Name** box, type the PI’s first name.
FastLane Help

- In the **Middle Initial** box, type the PI’s middle initial (optional).
- In the **Last Name** box, type the PI’s last name.
- In the **Organization** box, type the name of your organization.

11. In the **Other Senior Project Personnel** section (Figure 2), *if you need to change* information on Senior Personnel or *add or delete* Senior Personnel, click the **Add/Edit Personnel** button. See [Add/Edit Personnel](#) for instructions.

12. In the **Participating Organizations** section (Figure 2), *if you need to add or delete* participating organizations, click the **Add/Edit Organizations** button. See [Add/Edit Organizations](#) for instructions.

13. After you have completed the Letter of Intent, you have these options:

- **Save the Letter of Intent**
- **Forward the Letter of Intent to the SPO** (PI only)
- **Submit the Letter of Intent** (AOR for all Letters of Intent and PI for some types of Letters of Intent)

### What Information is Requested in the Letter of Intent?

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

All Letters of Intent request this information:

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

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

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

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

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

### Add/Edit Personnel

1. **Access the Create New LOI screen** (Figure 1)
2. In the Other Senior Personnel section (Figure 1), click the Add/Edit Personnel button. The Create LOI—Add/Edit Other Senior Personnel screen displays (Figure 2).

3. In the Other Senior Personnel section (Figure 2), complete the following:
   - In the First Name box, type the Senior Person’s first name.
   - In the Middle Initial box, type the Senior Person’s middle initial (optional).
   - In the Last Name box, type the Senior Person’s last name.
   - In the Organization Name box, type the Senior Person’s organization.
   - In the Department box, type the Senior Person’s department.
   - In the City box, type the city of the Senior Person’s organization.
   - In the State box, select the state of the organization from the drop-down list (required for United States only).
   - In the Country box, select the country of the organization from the drop-down list.
Figure 2  Create LOI—Add/Edit Other Senior Personnel screen. The Add to List button is circled.

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

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

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

![Create LOI—Add/Edit Other Senior Personnel screen](image)

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

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).
FastLane Help

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

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).

![FastLane Organization Search Screen](image)

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

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.

![FastLane Organization Search Result Screen](image)

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

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**.

![Figure 5](image5.png)

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

![Figure 6](image6.png)

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

**Delete an Organization**

On the **Create LOI—Add/Edit Participating Organization** screen (Figure 6), in the **Existing Organizations** section, click **Delete** on the row of the organization you want to delete. The **Create LOI—Add/Edit Participating Organization** screen displays (Figure 7) with the organization’s name removed from the **Existing Organizations** section.
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).
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
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.
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
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**Figure 1**  Create New LOI screen. The Submit button is circled.

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

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

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

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).

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

Figure 2  Letters of Intent screen on the Edit/View LOI tab with the search results in the LOI Work in
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](image1.jpg)

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

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

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

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

![Figure 2](image2.jpg)

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

There are three ways to view Letters of Intent:

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

See also **Search for Saved and Submitted Letters of Intent**

**View All Letters of Intent**

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

![Figure 1](Letters of Intent screen on the Edit/View LOI tab. The View All button is circled.)

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

![Figure 2](Letters of Intent screen on the Edit/View tab with a full listing of all Letters of Intent.)
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See also:
• View a Letter of Intent in HTML Format
• View a Letter of Intent in PDF Format

View a Letter of Intent in HTML Format

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

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

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

![Figure 2](image)

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

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

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

![Figure 3](image)

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

See also:
- [View All Letters of Intent](#)
- [View a Letter of Intent in HTML Format](#)
View the Program Solicitation for a Letter of Intent

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

![Image of Letters of Intent screen](image1)

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

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

![Image of Program Solicitation link](image2)

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

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

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

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

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 second assignment (optional)
   - The Program Officer who has expressed interest in the project (optional)
7. In the **Point of Contact for NSF Inquiries** section (Figure 2), click the radio button for either of the following:
   - Use this user as point of contact (individual’s information is displayed already)
   - Use (alternate) name as point of contact

8. **If you use the alternate point of contact:**
   - In the **First Name** box (Figure 2), type the alternate’s first name.
   - In the **Middle Initial** box (Figure 2), type the alternate’s middle initial (optional).
   - In the **Last Name** box (Figure 2), type the alternate’s last name.
   - In the **Telephone Number** box (Figure 2), type the alternate’s telephone number.
   - In the **Email Address** box (Figure 2), type the alternate’s email address.

9. In the **Project PI** section (Figure 2), type the following:
   - In the **First Name** box, type the PI’s first name.
   - In the **Middle Initial** box, type the PI’s middle initial (optional).
   - In the **Last Name** box, type the PI’s last name.
   - In the **Organization** box, type the name of your organization.

10. In the **Other Senior Personnel** section (Figure 2), **if you need to change information on Senior Personnel or add or delete Senior Personnel**, click the **Add/Edit Personnel** button. See [Add/Edit Personnel](#) for instructions.

11. In the **Participating Organizations** section (Figure 2), **if you need to add or delete participating organizations**, click the **Add/Edit Organizations** button. See [Add/Edit Organizations](#) for instructions.

**Forward a Saved Letter of Intent to the SPO/AOR**

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

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

   ![Figure 1](https://example.com/loiscreen.png)

   **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.
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).

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

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

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

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- 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).

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

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.
Figure 5 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).
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).
Principal Investigator (PI) Information

![Image of Principal Investigator Information screen]

**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).

![Image of Proposal Actions screen]

**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](#)).
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).

   ![Proposal Actions screen. The Check button is circled.](image)

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

3. Click the **Check** button (Figure 1).

4. The **Proposal Errors/Warnings** screen (Figure 2) is displayed with a list of proposal items that have not been completed.
Proposal Errors/Warnings For Temporary Proposal Id 7742431

Proposal Errors

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

Proposal Warnings

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

Figure 2  Proposal Errors/Warnings screen.

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).
Proposal Actions

*Please note: A Data Management Plan will be required for all proposals submitted 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.1 of the revised NSF Proposal & Award Policies & Procedures Guide. FastLane will automatically enforce the deadline dates. 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>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Temporary Proposal #</strong> Title of the Proposal Deadline Date</td>
</tr>
<tr>
<td>SE Pro &amp; Valid Jenkins Test 03/08/2016</td>
</tr>
<tr>
<td>SE 03/08/2016</td>
</tr>
<tr>
<td>ACPT Validation 03/08/2016</td>
</tr>
<tr>
<td>SBIR Phase I</td>
</tr>
<tr>
<td>SBIR Phase II</td>
</tr>
<tr>
<td>STTR Phase I</td>
</tr>
<tr>
<td>STTR Phase II</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Create New Proposal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create Blank Proposal</td>
</tr>
</tbody>
</table>

Go Back

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

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

Proposal Errors/Warnings For Temporary Proposal Id 7742431

Proposal Errors

<table>
<thead>
<tr>
<th>Item Listed Here Will Prevent Submission</th>
</tr>
</thead>
<tbody>
<tr>
<td>Items listed here will prevent submission. Print this page for reference before returning to the Form Preparation screen.</td>
</tr>
</tbody>
</table>

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

Proposal Warnings

<table>
<thead>
<tr>
<th>Item Listed Here Will Prevent Submission</th>
</tr>
</thead>
<tbody>
<tr>
<td>Items listed here will prevent submission. Print this page for reference before returning to the Form Preparation screen.</td>
</tr>
</tbody>
</table>

- Invalid Requested Starting Date - Enter a Requested Starting Date that is later than today’s date on the Budget and Duration section of the Remainder of the Cover Sheet Form.
6. The **Sponsored Project Office (SPO) Access Control** screen displays (Figure 3) with these control options:
   - [Go] Allow SPO to view proposal
   - [Go] Allow SPO to view and edit the proposal
   - [Go] Allow AOR to view, edit, and submit proposal

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

*If the SPO already has access to a proposal, the **Sponsored Project Office (SPO) Access Control** screen displays as in Figure 4 with these options:*
   - [Go] Allow SPO to view the proposal
   - [Go] Allow AOR to view, edit, and submit proposal
   - [Go] Remove all SPO access to this proposal
Allow Sponsored Project Office (SPO) to Only View a Proposal

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

   **Sponsored Project Office (SPO) Access Control**
   
   Current SPO Access for proposal 7577428 is set to None
   
   - [GO] Allow SPO to view proposal
   - [GO] Allow SPO to view and edit the proposal
   - [GO] Allow AOR to view, edit and submit proposal

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

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

   The SPO can now view (but not edit or submit) proposal 7577428
   
   - [OK]

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

3. Click the OK button (Figure 2). The Proposal Actions screen displays. See also:
   - Allow AOR to view, edit, and submit a proposal
   - Allow SPO to view and edit the proposal
   - Remove all SPO access to this proposal
Allow Sponsored Project Office (SPO) to View and Edit the Proposal

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

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

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

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

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

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

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

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

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

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

   ![Figure 2](image)

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

3. Click the **OK** button (Figure 2). The **Proposal Actions** screen displays. See also:
   - Allow SPO to only view proposal but not submit
   - Allow SPO to view and edit the proposal
   - Remove all SPO access to this proposal

**Remove Sponsored Project Office (SPO) Access to a Proposal**

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

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

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

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

![Submitted Proposals Screen](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 Screen](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.

![Temporary Proposal Number Message](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).
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

*Please note: A Data Management Plan will be required for all proposals submitted on or after January 13, 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.1 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 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>Temporary Proposal</th>
<th>Title of the Proposal - Deadline Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>757745: SE Proc/Valid Jenkins Test</td>
<td>03/08/2016</td>
<td></td>
</tr>
<tr>
<td>757743: SE Proc/Valid Jenkins Test</td>
<td>03/08/2016</td>
<td></td>
</tr>
<tr>
<td>757743: ACPT Validation - pradeep DNT</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Create New Proposal

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

Go Back

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

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

Figure 9  Form Preparation screen for the copied proposal.

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
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
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- 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
**Cover Sheet**

**What Is the Cover Sheet?**

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

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

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

**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](Image)

   **Forms for Temp. Proposal #7577448**

   **SE ProdValid Jenkins Test**

   **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>GO Cover Sheet</td>
<td>12/15/15</td>
<td>GO Project Summary</td>
<td>12/15/15</td>
</tr>
<tr>
<td>GO Table of Contents</td>
<td>N/A</td>
<td>GO Project Description</td>
<td></td>
</tr>
<tr>
<td>GO References Cited</td>
<td></td>
<td>GO Biographical Sketches</td>
<td></td>
</tr>
<tr>
<td>GO Budgets (Including Justification)</td>
<td></td>
<td>GO Current and Pending Support</td>
<td></td>
</tr>
<tr>
<td>GO Facilities, Equipment, and Other Resources</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

   **Supplementary Documents**

   - GO Data Management Plan
   - GO Mentoring Plan
   - GO Project Summary with Special Characters
   - GO Other Supplementary Docs

   **Single Copy Documents**

   - GO Collaborators and other Affiliations: 12/15/15
   - GO Deviation Authorization (if applicable): N/A
   - GO List of Suggested Reviewers (optional): N/A
   - GO Additional Single Copy Documents

   ![Go Back Button](Button)

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

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

![Print Menu](image)

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

4. Click the **Go** button for Cover Sheet (Figure 3). The Cover Sheet displays (Figure 4) in PDF format. If you need to download Adobe Reader, see [Adobe Reader for FastLane](https://www.adobe.com/products/reader.html).
Figure 4  Cover Sheet in PDF format. The Print icon is circled.

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

Awardee & Project/Performance Site Primary Location

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).
FastLane Help

**Cover Sheet Components Form**

The NSF Cover Sheet within FastLane has been divided into 3 sections:
- Program Announcement / Solicitation Number Selection
- NSF Unit Consideration
- Remainder of Cover Sheet

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

**Awardee Organization/Primary Place Of Performance Selection**

<table>
<thead>
<tr>
<th>Awardee Organization</th>
<th>Primary Place of Performance</th>
</tr>
</thead>
<tbody>
<tr>
<td>National Science Foundation</td>
<td></td>
</tr>
</tbody>
</table>

Address
Arlington, VA 222301000

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

Inst Code
4102852000

DUNS #
074811803

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

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

**NSF Unit Consideration**

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

**Remainder of the Cover Sheet**

---

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

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

The NSF Cover Sheet within FastLane has been divided into 3 sections:
- Program Announcement / Solicitation Number Selection
- NSF Unit Consideration
- Remainder of Cover Sheet

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

Awardee Organization/Primary Place Of Performance Selection

| National Science Foundation |

Address
Arlington, VA 222301000

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

Inst. Code
4102882000

DUNS #
074111803

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

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

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

Remainder of the Cover Sheet

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

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

Primary Place of Performance
Address: National Science Foundation
AO

Add/Change Project/Performance Site Primary Location

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

Institutions for this proposal

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

Primary Place of Performance
Address: National Science Foundation
AO

Add/Change Primary Place of Performance

Change Awardee

Go Back
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](image)

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)

5. Click the **Go Back** button (Figure 3). The **Institutions for This Proposal** screen displays (Figure 4) with the information for the organization you selected.
Figure 4  Institutions for This Proposal screen. The Primary Place of Performance section is boxed.

**Change Awardee**

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

2. Click the Change Awardee button (Figure 1). The Institution 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 **Institutions Located** screen displays (Figure 3).

6. Highlight the organization on the **Institutions Located** list (Figure 3).

7. Click the **Select Awardee** button (Figure 3). A screen displays (Figure 4) with the message that the Awardee Organization has been changed.
Figure 4  Screen with the message that the Awardee Organization has been changed.

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

Institutions for this proposal

<table>
<thead>
<tr>
<th>Awardee Organization</th>
<th>Primary Place of Performance</th>
</tr>
</thead>
<tbody>
<tr>
<td>NSF</td>
<td>National Science Foundation</td>
</tr>
<tr>
<td>NSF</td>
<td></td>
</tr>
<tr>
<td>McMurdo Station</td>
<td></td>
</tr>
<tr>
<td>McMurdo, Antarctica</td>
<td></td>
</tr>
<tr>
<td>Address:</td>
<td>Address:</td>
</tr>
<tr>
<td>Time Zone:</td>
<td>AO</td>
</tr>
<tr>
<td>Institution Code:</td>
<td></td>
</tr>
<tr>
<td>DUNS Number:</td>
<td>7203576347</td>
</tr>
</tbody>
</table>

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

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).
Cover Sheet Components Form

The NSF Cover Sheet within FastLane has been divided into 3 sections:
- Program Announcement / Solicitation Number Selection
- NSF Unit Consideration
- Remainder of Cover Sheet

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

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

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

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

3. Highlight the Program Announcement or Solicitation Number for the proposal from the Program

...
Announcement/Solicitation Number list (Figure 2). If the proposal is not in response to a Program Announcement, highlight — Proposal & Award Policies & Procedures Guide

4. Click the Select button (Figure 2). The Unit Selection Lists (Figure 3) screen displays.

**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 Description/Announcement/Solicitation Number** section.

![Unit Selection Lists screen](image)

**Figure 1**  
**Unit Selection Lists screen.**

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

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

**Select the NSF Primary Program**

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

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 Selection 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.

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

**Figure 2**  
*Unit Selection Lists screen with the unit now removed.*
Remainder of Cover Sheet

Remainder of the Cover Sheet

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

The Remainder of the Cover Sheet component consists of:

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

- Certifications the Authorized Organizational Representative (AOR) signs by electronically signing the proposal

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

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

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 screen](image)

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

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.
Remainder of the Cover Sheet

Title of Proposed Project

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

Budget And Duration Information

Requested Amount: $ 4444.00 (Note: The requested amount is calculated from the budget form)
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 03/03/2016

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).
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).

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**).

![Figure 1](image1.png)

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

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

![Figure 2](image2.png)

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

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

**Co-PI Information**

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

1. Access the **Remainder of the Cover Sheet** screen (Figure 1) (see Access the **Remainder of the Cover Sheet Screen**).
Figure 1    Remainder of the Cover Sheet screen. The Co-PI Information link is circled.

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

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

<table>
<thead>
<tr>
<th>Name</th>
<th>Enter the co-PI's NSF ID (000####) 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: 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>

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

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

![Co-Principal Investigator (Co-PI) Information](image2)

<table>
<thead>
<tr>
<th>Name</th>
<th>Enter the co-PI's NSF ID (000####) 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></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>
Figure 3  The Co-Principal Investigator (Co-PI) Information section of the Remainder of the Cover Sheet screen with a check mark box to remove a Co-PI.

- **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**).

![Remainder of the Cover Sheet](image)

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

![Previous NSF Awards](image)

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 1](image1.png)

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

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*).

![Figure 2](image2.png)

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

2. Click **Awardee Organization** (Figure 1). The **Awardee Organization** section displays (Figure 2).

![Figure 1](image3.png)

**Figure 1**  
Remainder of the Cover Sheet screen. The Awardee Organization link is circled.

2. Click **Awardee Organization** (Figure 1). The **Awardee Organization** section displays (Figure 2).

![Figure 2](image4.png)

**Figure 2**  
Awardee Organization Information section of the Remainder of the Cover Sheet screen.

The Awardee Organization information automatically displays if you submitted this information when you or another person registered your organization. The cover requires the following information:

- Organization name
- Address
- Organization code
- Data Universal Numbering System (DUNS) number
Employer Identification Number (EIN) or Taxpayer Identification Number (TIN)

The Office of Management and Budget (OMB) issued a policy directive which requires proposers to provide a DUNS number when applying for a new award or renewal of an award under Federal grants or cooperative agreements. In accordance with this mandate, NSF requires that institutions registering to use NSF’s electronic systems have a valid and active System for Award Management (SAM) registration and an active DUNS number. If your organization does not have a unique nine-digit DUNS number, contact Dun and Bradstreet at (866) 705-5711 or http://fedgov.dnb.com/webform. Dun and Bradstreet will provide a DUNS number by telephone at no charge. If the DUNS number is not on the Cover Sheet, you can add it when you submit the proposal.

If your organization is a profit-making entity, you must certify this status by checking each of the organization type boxes that apply. The options and the guidelines for each are as follows:

- **For Profit**
  A U.S. commercial organization, especially small business with strong capabilities in scientific or engineering research or education

- **Small Business**
  For profit, privately owned, no more than 500 employees, and not dominant in its field. (Check this box also when the proposal involves a cooperative effort between an academic organization and a small business.)

- **Minority Business**
  At least 51% owned by one or more minority or disadvantaged individuals. (If a publicly owned business, at least one or more minority or disadvantaged individuals must own 51% of the voting stock. One or more such individuals must also control the management and daily business operations.)

- **Woman-Owned Business**
  At least 51% owned by a woman or women who also control it and operate it

**Other Information**

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

   **Figure 1**  Remainder of the Cover Sheet screen. The Other Information link is circled.

2. Click Other Information (Figure 1). The Other Information section displays (Figure 2).
Other Information

Check Appropriate Box(es) if this proposal includes any of the items listed below:

- Beginning Investigator (PAPPG I.I.D.2)
- Disclosure of Lobbying Activities (PAPPG I.I.D.1)
- Proprietary & Privileged Information (PAPPG I.E.1.c & I.I.D.1)
- Historic Places (PAPPG I.E.2)
- Vertebrate Animals (PAPPG I.E.5)
  - IACUC App. Date (MMDDYY)
  - PHS Animal Welfare Assurance Number
- Human Subjects (PAPPG I.E.6)
  - Exemption Subsection
  - IRB App. Date (MMDDYY)
  - Human Subjects Assurance Number
- International Activities Country Name (PAPPG I.E.2)
  - Country 1. Australia
  - Country 2.
  - Country 3.
  - Country 4.
  - Country 5.

Type of Proposal (select one)
- GOAL

- 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 I.E.6.a)
- A collaborative proposal from multiple organizations (PAPPG I.E.6.b)
- Not a collaborative proposal

---

Figure 2  Other Information section of the Remainder of the Cover Sheet screen.

3. 1. Check the appropriate boxes (Figure 2), if the proposal includes any of the items of Other Information. See the Proposal & Award Policies & Procedures Guide (PAPPG) chapter and section noted at the end of each item line for more information. The categories of Other Information are:
- Beginning Investigator
- Disclosure of Lobbying Activities (see "Disclosing Lobbying Activities")
- Proprietary and Privileged Information
- Historic Places
- Vertebrate Animals with IACUC App. Date or PHS Animal Welfare Assurance Number (PAPPG Chapter II.D.4)
- Human Subjects with Exemption Subsection, IRB App. Date or Human Subjects Assurance Number (PAPPG Chapter II.D.5)
- International Activities Country Name (select countries involved) in the boxes (Figure 2)

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).
Figure 2 Table of Contents screen. This is a view-only form.

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)
Figure 1  Form Preparation screen. The Go button for References Cited is circled.

2. Click the Go button for References Cited (Figure 1). The References Cited screen displays (Figure 2).
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.
Data for References Cited form saved. OK

**Figure 2** Screen with the message that the References Cited text is saved.

4. Click the OK button (Figure 2). The **Form Preparation** screen displays.

**Upload References Cited**

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

![References Cited screen. The Transfer File button is circled.](image)

**Figure 1** References Cited screen. The Transfer File button is circled.

2. Click the **Transfer File** button (Figure 1). The **References Cited File Upload** screen displays (Figure 2). See **Upload a File** for directions.

![References Cited File Upload screen.](image)

**Figure 2** References Cited File Upload screen.

*If References Cited have already been uploaded,* when you click the **Go** button for References Cited on the **Form Preparation** screen, the **References Cited File Upload** screen displays (Figure 3) with these options:
• Display Current References Cited
• Delete Current References Cited
• Upload a New References Cited (This option automatically replaces the already uploaded file.)

![References Cited File Upload screen if a file has already been uploaded.]

**Display Current References Cited**

Click the Display Current References Cited button (Figure 3). The previously uploaded References Cited displays in PDF format. If you need to download Adobe Reader, see Adobe Reader for FastLane.

**Delete Current References Cited**

1. Click the Delete Current References Cited button (Figure 3). A screen displays with a message for you to confirm that you want to delete the file.
2. Click the OK button. The Form Preparation screen displays.

**Upload a New References Cited**

Follow the directions in Upload a File. Uploading a new References Cited document automatically replaces the previously uploaded file.

**Enter a New References Cited in the Text Box**

*If a References Cited has already been uploaded and you want to enter a new References Cited in the text box, do the following:*  
1. Click the Delete Current References Cited button (Figure 3). A screen displays with a message for you to confirm that you want to delete the file.
2. Click the OK button. The References Cited File Upload screen displays (Figure 2).
3. Return to the Form Preparation screen.
4. Click the Go button for References Cited. The References Cited screen displays with the text box (Figure 1). See Enter References Cited in the Text Box for instructions.

**Budgets (Including Justification)**

**What Are Budgets (Including Justification)?**

A proposal must have a budget for each year that you are requesting NSF support. It must also have a cumulative budget for the full term of 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](https://www.fastlane.gov/). Consult [Proposal & Award Policies & Procedures Guide (PAPPG) Chapter II.C.2.g.xii](https://www.fastlane.gov/) for a full description.

**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](https://www.fastlane.gov/) for a full description.

**Create a Budget**

1. Access the **Form Preparation** screen (Figure 1) (see [Create a New Proposal](https://www.fastlane.gov/), [Edit a Proposal](https://www.fastlane.gov/), or [Create a New Proposal from a Template](https://www.fastlane.gov/)).
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.

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**Step 1  Add a Year**
1. Access the Project Budget screen (Figure 1) (see Create a Budget).

![Figure 1](Project Budget screen. The Add Year link is circled.)

2. Click Add Year under the name of your organization (Figure 1). The Budget Year Add screen displays (Figure 2) for your organization.

![Figure 2](Budget Year Add screen. The Add button is circled.)

3. Highlight a year to add from the Select New Year to Add drop-down list (Figure 2).
4. Click the Add button (Figure 2). The Project Budget screen displays (Figure 3) with the year listed in the Year column for your organization. The screen also displays Funds and Personnel links for that budget year. Now you are ready to enter the budget data for that year.

![Figure 3](Project Budget screen with Year 1 added for creating a budget. The Funds link and the Personnel link are circled.)

**Step 2 Enter the Budget Data**

1. Access the Project Budget screen (Figure 1) (see Create a Budget).
Figure 1  Project Budget screen. The Funds link and the Spreadsheet Support link are circled.

2. Complete Step 1 Add a Year. Now you are ready to enter the budget data. You have these options for entering the budget data:
   - On the Project Budget screen (Figure 1), click Spreadsheet Support to complete the budget offline.
   - On the Project Budget screen (Figure 1), click Funds on the line for that budget year to enter budget data online.

Complete the Budget Offline

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

Figure 1  Project Budget screen. The Spreadsheet Support link is circled.

2. Click Spreadsheet Support (Figure 1). The Spreadsheet Support Select Organization screen displays (Figure 2).

Figure 2  Spreadsheet Support Select Organization screen. The Continue button is circled.

3. Click the radio button for the organization for which you are creating the budget (Figure 2).
4. Click the Continue button (Figure 2). The Spreadsheet Support screen displays (Figure 3).
5. Click the **Download** button to download the Spreadsheet template (Figure 3).
6. Save the Excel spreadsheet to your computer with a new name.
7. Enter the budget data into the Excel spreadsheet offline using the instructions accompanying the template.
8. When finished, on the **Spreadsheet Support** screen (Figure 3), upload the completed spreadsheet to FastLane. See **Upload a File**.

### Enter Budget Data Online

**Enter the Budget Data Online**

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

   ![Figure 1](image1.png)

   **Figure 1**  
   **Project Budget screen with the Funds link circled.**

2. Click **Funds** on the line for the year for which you want to create a budget (Figure 1). The **Budget Year** screen displays (Figure 2).
Figure 2  Upper portion of the Budget Year screen with the navigating links for the Budget sections.

Navigate the Budget Year Screen

- The top of the Budget Year screen has links to all sections of the budget. To navigate the Budget Year screen (Figure 2), click on any of the links to sections that you want to view or work on:
  - Senior Personnel
  - Other Personnel
  - Fringe Benefits
  - Equipment
  - Travel
  - Participant Support Costs
  - Other Direct Costs
  - Indirect Costs
  - Cost Sharing

(Click on a link above for instructions on how to complete that section of the Budget Year screen.)

- In each section, you can click the Calculate button (Figure 3), and FastLane will calculate the totals for that section.

Figure 3  Calculate button, for example, in the Participant Support Costs section of the Budget Year screen.

- Click the Calculate and Save button often at the bottom of the screen (Figure 4), to save the data as you work through the different sections of the Budget Year screen.
FastLane Help

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).

![Budget Year 1 for National Science Foundation](image)

Figure 1  Budget Year screen. The Senior Personnel link is circled.

2. Click Senior Personnel (Figure 1). The Senior Personnel section of the Budget Year screen displays (Figure 2) with a listing of the Senior Personnel assigned to the proposal.

![A. Senior Personnel](image)

Figure 2  Senior Personnel section of the Budget Year screen.

3. For each individual listed (Figure 2), enter the following:
   - In the Title box, type the individual’s title.
   - In the Calendar Months box, type the number of calendar months the person will work on the project.
   - In the Academic Months box, type the number of academic months the person will work on the project.
   - In the Summer Months box, type the number of summer months the person will work on the project.
In the **Funds Requested by the Proposer** box, type the amount of funds requested for the individual (no dollar signs, no commas).

4. When you have finished typing the information for all senior personnel, click the **Calculate** button (Figure 2) to calculate the total amount you are requesting for all senior personnel listed.

All fields are optional.

*If you need to add or delete personnel to the Senior Persons list, click the Add/Remove Senior Personnel button (Figure 2). The Budget Personnel screen displays (Figure 3). See Add a Senior Person or Delete a Senior Person for instructions on adding or removing a senior person.*

![Figure 3: Budget Personnel screen](image)

**Other Personnel**

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

![Figure 1: Budget Year screen. The Other Personnel link is circled.](image)

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).

![Figure 1 Budget Year screen. The Fringe Benefits link is circled.](image)
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](image1)

Figure 1: Budget Year screen. The Travel link is circled.

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

![Travel section](image2)

Figure 2: Travel section of the Budget Year form screen.

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.

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

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

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

**Other Direct Costs**

1. Access the **Budget Year** screen (Figure 1) (see **Enter the Budget Data Online**).
Figure 1  Budget Year screen. The Other Direct Costs link is circled.

2. Click Other Direct Costs (Figure 2). The Other Direct Costs section of the Budget Year screen displays (Figure 2).

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

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.

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).
FastLane Help

**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

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

![Figure 2 Budget Justification File Upload screen.](image)

*When a Budget Justification has been uploaded*, the **Budget Justification File Upload** screen displays as in Figure 5. This screen gives you three options:

- **Display Current Budget Justification**
- **Delete Current Budget Justification**
- **Upload a New Budget Justification** *(This option automatically replaces the already uploaded Budget Justification.)*

![Figure 5 Budget Justification File Upload screen if a Justification has been uploaded.](image)
**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
3. Highlight a year to add from the Select New Year to Add list (Figure 2).
4. On the right side of the Budget Year Add screen (Figure 2), click the radio button for the year you want to copy the budget from.
5. Click the Add button (Figure 2). The Project Budget screen displays (Figure 3) with the copied budget listed for the year you selected.

Figure 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.

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).

Figure 1  Project Budget screen. The Funds link is circled for a budget year.

2. Click Funds for the budget year that you want to edit. The Budget Year screen displays (Figure 2) for that year’s budget.
Figure 2  Budget Year screen.

3. Edit the budget as you require (see Enter Budget Data Online for instructions).
4. Click the **Calculate and Save** button at the bottom of the screen (Figure 3) when you are finished.

Figure 3  Calculate and Save button (circled) at the bottom of the Budget Year screen.

**Add or Delete Senior Personnel**

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

Figure 1  Project Budget screen. The Personnel link is circled.

2. Click **Personnel** for the organization and budget year for which you want to add or delete the personnel. The **Budget Personnel** screen displays (Figure 2).
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:
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).

   ![Project Budget screen. The Delete Checked Year(s) button is circled.](image1)

   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.

   ![Screen with a message for you to confirm that you want to delete the checked budget year. The Yes button is circled.](image2)

   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.

   ![Project Budget screen without the deleted budget year.](image3)

   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).

![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.

![Figure 2: Current Budget Organizations screen.](image)

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

- **Search by name**
- **Search by DUNS (Data Universal Numbering System) number**

**Search by Name**

1. On the Current Budget Organizations screen (Figure 2), select the search type option:
   - **Begins with** returns all organizations whose name begins with the text entered.
   - **Ends with** returns all organizations whose name ends with the text entered.
   - **Contains** returns all organizations whose name contains the text entered.
2. Type in the box the string (at least three characters) to search for.
3. Click the Search by Name button (Figure 2). The Name-Inst ID screen displays (Figure 3) (see Select the Organization from the Results).
Search by DUNS Number

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

Select the Organization from the Results

1. On the Name-Inst ID screen (Figure 3), highlight the name of the organization you want to add to the project from the list.
2. Click the Select button (Figure 3). If the organization has a registered PI(s), the Principal Investigation Designation screen displays (Figure 4).

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.

Add a Subrecipient Organization

A separate budget should be provided for each subrecipient along with a description of the work performed.

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

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

2. Click Add Another Organization (Figure 1). The Current Budget Organizations screen displays (Figure 2) with all the budget organizations listed at the top. At the bottom of the screen is the link to search for the organization you want to add.
You have two options for searching for the organization you want to add:

- **Search by name**
- **Search by DUNS (Data Universal Numbering System) number**

### Search by Name

1. On the **Current Budget Organizations** screen (Figure 2), select the search type option:
   - **Begins with** returns all organizations whose name begins with the text entered.
   - **Ends with** returns all organizations whose name ends with the text entered.
   - **Contains** returns all organizations whose name contains the text entered.
2. Type in the box the string (at least three characters) to search for.
3. Click the **Search by Name** button (Figure 2). The **Name-Inst ID** screen displays (Figure 3) (see **Select the Organization from the Results**).

### Search by DUNS Number

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

**Select the Organization from the Results**
1. On the Name-Inst ID screen (Figure 3), highlight the name of the organization you want to add to the project from the list.
2. Click the Select button (Figure 3). If the organization has a registered PI(s), the Principal Investigation Designation screen displays (Figure 4).

![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

![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).

2. Click Add Year under the name of the subrecipient organization (Figure 1). The Budget Year Add screen displays (Figure 2) for that organization.

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

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

To create a budget for a selected year, you have these options:

- On the Project Budget screen (Figure 1), click Funds on the line for that budget year and enter the budget data online in the form provided.
- On the Project Budget screen (Figure 1), click Spreadsheet Support to complete the budget offline.

After you have completed the budget for the subrecipient organization, you must also justify the budget.

You can also copy a budget from one year to another for a subrecipient organization.

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).

**Figure 1**  Project Budget screen. The Change Org. link is circled.

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

**Figure 2**  Change Organization screen.

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

- **Search by name**
- **Search by DUNS (Data Universal Numbering System) number**

**Search by Name**

1. On the **Current Budget Organizations** screen (Figure 2), select the search type option:
   - **Begins with** returns all organizations whose name begins with the text entered.
   - **Ends with** returns all organizations whose name ends with the text entered.
   - **Contains** returns all organizations whose name contains the text entered.
2. Type in the box the string (at least three characters) to search for.
3. Click the **Search by Name** button (Figure 2). The **Name-Inst ID** screen displays (Figure 3) (see **Select the Organization from the Results**).
**FastLane Help**

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

**Search by DUNS Number**

1. On the **Current Budget Organizations** screen (Figure 2), type in the nine-digit DUNS number.
2. Click the **Search by DUNS** button (Figure 2). The **Name-Inst ID** screen displays (Figure 3) (see **Select the Organization from the Results**).

**Select the Organization from the Results**

1. On the **Name-Inst ID** screen (Figure 3), highlight the name of the organization you want to add to the project from the list.
2. Click the **Select** button (Figure 3). The **Project Budget** screen displays (Figure 4) with the name of the new organization added and the name of the original subrecipient organization deleted.

**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.

4. Click the **Yes** button (Figure 1). The **Project Budget** screen displays (Figure 3) without the name of the organization you deleted.
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).

![Form Preparation screen](image)

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

2. Click the Go button for Facilities, Equipment, and Other Resources (Figure 1). The *Facilities, Equipment, and Other Resources* screen displays (Figure 2).

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Facilities, Equipment, and Other Resources

**Instructions:** Upload an aggregated description of the internal and external resources (both physical and personnel) that the organization and its collaborators will provide to the project, should it be funded. Describe only those resources that are directly applicable. The description should be narrative in nature and must not include any quantifiable financial information. If there are no Facilities, Equipment, or Other Resources identified, a statement to that effect should be indicated in this section and uploaded into FastLane. See PAPPG II.C.2.i for more information.
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
- Biographical Sketches
- Current and Pending Support
- Supplementary Docs
- Add/Delete Non-Co-PI Senior Personnel
- Change PI
- Link Collaborative Proposals
- Proposal Classification Form

What Are Facilities, Equipment, and Other Resources?

_in the Facilities, Equipment, and Other Resources section, you describe 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](image1.png)

**Facilities, Equipment, and Other Resources form screen. The Upload File button is circled.**

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).

![Figure 2](image2.png)

**Facilities, Equipment, and Other Resources form screen. The Upload File button is circled.**

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

*If a file on Facilities, Equipment, and Other Resources has already been uploaded,* when you click the Go button for Facilities, Equipment, and Other Resources on the Form Preparation screen, the Facilities, Equipment, and Other Resources File Upload screen displays (Figure 3) with these options:

- Display Current Facilities, Equipment, and Other Resources
- Delete Current Facilities, Equipment, and Other Resources
- Upload a New Facilities, Equipment, and Other Resources (This option automatically replaces the already uploaded file.)

Figure 3  Facilities, Equipment, and Other Resources File Upload screen after a file has been uploaded.

*Display Current Facilities, Equipment, and Other Resources*

Click the Display Current Facilities, Equipment, and Other Resources button (Figure 3). The previously uploaded file displays in PDF format. If you need to download Adobe Reader, see [Adobe Reader for FastLane](#).

*Delete Current Facilities, Equipment, and Other Resources*
1. Click the **Delete Current Facilities, Equipment, and Other Resources** button (Figure 3). A screen displays with a message for you to confirm that you want to delete the file.
2. Click the **OK** button. The **Form Preparation** screen displays.

**Upload a New Facilities, Equipment, and Other Resources**

Follow the directions in **Upload a File**. Uploading a new **Facilities, Equipment, and Other Resources** file automatically replaces the previous one.

**What Is a Deviation Authorization?**

A Deviation Authorization grants you exceptions to the requirements of the **Proposal & Award Policies & Procedures Guide (PAPPG)**. See **PAPPG Chapter II.A.** for more on deviations.

In this form, you provide either one of the following:

- Program Solicitation number, in the appropriate block on the Cover Sheet
- Name and title of the NSF official who authorized the deviation and the date of authorization

**Work on Deviation Authorization**

1. Access the **Form Preparation** screen (Figure 1) (see **Create a New Proposal**, or **Edit a Proposal**).
2. Click the Go button for Deviation Authorization (Figure 1). The Deviation Authorization screen displays (Figure 2).

**Figure 1**  Form Preparations screen. The Go button for Deviation Authorization is circled.
3. Type in or copy and paste either one of the following into the text box (Figure 2):
   - Program Solicitation number, in the appropriate block on the Cover Sheet
   - Name and title of the NSF official who authorized the deviation and the date of authorization
4. Click the **Save Text** button (Figure 2). A screen displays (Figure 3) with a message that the Deviation Authorization has been saved.

![Data for Deviation Authorization form saved.](OK)

5. Click the **OK** button (Figure 3). The **Form Preparation** screen displays (Figure 1). See also:
   - **Cover Sheet**
   - **Table of Contents**
   - **References Cited**
   - **Budgets (Including Justification)**
   - **Facilities, Equipment, and Other Resources**
   - **List of Suggested Reviewers**
   - **Additional Single Copy Documents**
   - **Project Summary**
   - **Project Description**
   - **Biographical Sketches**
   - **Current and Pending Support**
   - **Supplementary Docs**
   - **Add/Delete Non-Co-PI Senior Personnel**

   - **Change PI**
   - **Link Collaborative Proposals**
   - **Proposal Classification Form**

### What Is the List of Suggested Reviewers?

Proposers may enter the names of reviewers whom you recommend as reviewers for the proposal. You may also enter the names of reviewers whom you recommend not review the proposal along with the reason why they should not. The *Proposal & Award Policies & Procedures Guide (PAPPG)* Exhibit II-2 contains information on conflicts of interest that may be useful in the preparation of this list.

Providing information for the List of Suggested Reviewers is optional.

#### Create a List of Suggested Reviewers

1. Access the **Form Preparation** screen (Figure 1) (see **Create a New Proposal** or **Edit a Proposal**).
Figure 1  Form Preparations screen. The Go button for List of Suggested Reviewers is circled.

2. Click the Go button for List of Suggested Reviewers (Figure 1). The List of Suggested Reviewers screen displays (Figure 2).
List Of Suggested Reviewers Optional

In order to avoid suggesting reviewers who may have a conflict of interest with you or your organization, see Proposal & Award Policies & Procedures Guide Exhibit II-2, Potentially Disqualifying Conflicts of Interest (opens new window). The information contained in this appendix may be of use in preparation of your list.

Suggested Reviewers:
Provide the First, Middle, and Last Name including email address and institutional affiliation of suggested reviewers that you believe are especially well qualified to review this proposal.

Reviewers Not to Include:
Designate persons you would prefer not review this proposal and indicate why.

3. In the Suggested Reviewers box (Figure 2), type in or copy and paste the first and last names and middle initials of those who you think are especially qualified to review the proposal (optional).

4. In the Reviewers Not to Include box (Figure 2), type in or copy and paste the names of those you think should not review the proposal and your reasons why (optional).

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

Figure 2 List of Suggested Reviewers screen. The Save Text button is circled.

Figure 3 Screen with a message that the lists have been saved.

6. Click the OK button (Figure 3). The Form Preparation screen displays (Figure 1). See also:
   • Cover Sheet
   • Table of Contents
   • References Cited
   • Budgets (Including Justification)
   • Facilities, Equipment, and Other Resources
   • Deviation Authorization
   • Additional Single Copy Documents
   • Project Summary
   • Project Description
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 ()
- Certification Regarding Lobbying (PAPPG Exhibit II-S)
  · 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)
Figure 1  Form Preparation screen. The Go button for Additional Single Copy Documents is circled.

2. Click the Go button next to Additional Single Copy Documents (Figure 1). The Additional Single Copy Documents screen displays (Figure 2).

Figure 2  Additional Single Copy screen.

You have these options for submitting an Additional Single Copy Document:
Enter an Additional Single Copy Document in the Text Box

1. Access the Additional Single Copy Documents screen (Figure 1) (see Work on Additional Single Copy Documents).

![Additional Single Copy Documents](image)

**Figure 1** Additional Single Copy screen. The Save Text button is circled.

2. Type in or copy and paste the Additional Single Copy Document in the text box (Figure 1).
3. Click the Save Text button (Figure 1). A screen displays with a message that the Additional Single Copy Document data is saved.

![Data for Additional Single Copy Documents form saved](image)

**Figure 2** Screen with the message that the Additional Single Copy Document data is saved.

4. Click the OK button (Figure 2). The Form Preparation screen displays.

Upload an Additional Single Copy Document

1. Prepare a word-processing document for the Additional Single Copy Document. See Acceptable Formats for FastLane to see a listing of the many formats FastLane accepts.
2. Access the Additional Single Copy Documents screen (Figure 1)
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.
5. Click the **Go** button for Additional Single Copy Document. The **Additional Single Copy Document** screen displays with the text box. See **Enter an Additional Single Copy Document in the Text Box**.

**Project Summary**

**What Is the Project Summary?**

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.
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**.
Figure 2   Project Summary Preparation Instructions screen.

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.
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).

![Project Summary](image)

<table>
<thead>
<tr>
<th>Project Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Instructions for Preparation of the Project Summary in Fastl. app</td>
</tr>
<tr>
<td>Each proposal must contain a summary of the proposed project not more than one page in length. The Project Summary consists of an overview, a statement on the intellectual merit of the proposed activity, and a statement on the broader impacts of the proposed activity.</td>
</tr>
<tr>
<td>The overview includes a description of the activity that would result if the proposal were funded and a statement of objectives and methods to be employed. The statement on intellectual merit should describe the potential of the proposed activity to advance knowledge. The statement on broader impacts should describe the potential of the proposed activity to benefit society and contribute to the achievement of specific, desired societal outcomes.</td>
</tr>
<tr>
<td>The Project Summary should be informative to other persons working in the same or related fields, and, insofar as possible, understandable to a broad audience within the scientific domain. It should not be an abstract of the proposal.</td>
</tr>
<tr>
<td>Proposals that do not contain the Project Summary, including an overview and separate statements on intellectual merits and broader impacts, will not be accepted or will be returned without review.</td>
</tr>
</tbody>
</table>

What should I enter in each of the three text boxes?

Overview: Insert a self-contained description of the activity that would result if the proposal were funded and include a statement of objectives and methods to be employed.

Intellectual Merit: Describe the potential of the proposed activity to meet the Intellectual Merit criterion.

Broader Impacts: Describe the potential of the proposed activity to meet the Broader Impacts criterion.

Information must be entered into all three text boxes, or the proposal will not be accepted.

What is the limit on the total number of characters allowed for the Project Summary (i.e., the sum of the three boxes)?

Project Summary should be limited to 1 page in length. Please ensure that the Project Summary is limited to 1 page prior to submission.

What should I do if I have to use "special characters"?

Most proposers will not need to use special characters, e.g., mathematical symbols or Greek letters. If special characters are required, then upload the Project Summary as a Supplementary Document and check the box to indicate this. The Project Summary may ONLY be uploaded as a Supplementary Document if the use of special characters is required. Project Summaries submitted as a PDF must be formatted with separate headings for the overview, statement on the intellectual merit of the proposed activity, and statement on the broader impacts of the proposed activity. Failure to include these headings may result in the proposal being returned without review.

Figure 1: Project Summary screen.

2. Type in or copy and paste the Project Summary in the boxes, per the instructions displayed on screen. (Figure 1).

3. Click the Save Text button. A screen displays (Figure 2) with a confirmation message that the Project Summary data is saved.

Data for Project Summary form saved. OK

Figure 2: Screen with the message that the Project Summary has been saved.

4. Click the OK button (Figure 2). The Form Preparation screen displays (Figure 1).

Upload the Project Summary with Special Characters

1. Access the Project Summary screen (Figure 1) (see Work on the Project Summary).
Figure 1  Project Summary screen. The check box for a Project Summary uploaded as a Supplementary Document is circled.

2. If the Project Summary requires the use of special characters, then click the checkbox on this screen next to the sentence, “Check here if your Project Summary is uploaded as a Supplementary Document.” Proceed to the Form Preparation screen, Supplementary Documents section to upload the Project Summary with Special Characters (Figure 2).
FastLane Help

**Form Preparation**

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

<table>
<thead>
<tr>
<th>Form</th>
<th>Saved</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cover Sheet</td>
<td>08/02/16</td>
</tr>
<tr>
<td>Table of Contents</td>
<td>N/A</td>
</tr>
<tr>
<td>References Cited</td>
<td></td>
</tr>
<tr>
<td>Budgets (Including Justification)</td>
<td></td>
</tr>
<tr>
<td>Facilities, Equipment, and Other Resources</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Form</th>
<th>Saved</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Summary</td>
<td>08/01/16</td>
</tr>
<tr>
<td>Project Description</td>
<td>08/01/16</td>
</tr>
<tr>
<td>Biographical Sketches</td>
<td>08/01/16</td>
</tr>
<tr>
<td>Current and Pending Support</td>
<td></td>
</tr>
<tr>
<td>Project Data Form</td>
<td>08/02/16</td>
</tr>
</tbody>
</table>

**Supplementary Documents**

- Data Management Plan
- Mentoring Plan
- Project Summary with Special Characters
- Other Supplementary Docs
- GOALI - Industrial PI Confirmation Letter
- RAISE – Program Officer Concurrence

**Single Copy Documents**

- Collaborators and Other Affiliations
- Deviation Authorization (if applicable)
- List of Suggested Reviewers (optional)
- Additional Single Copy Documents
- Nature of Natural or Anthropogenic Event

- Add/Delete Non Co-PI Senior Personnel
- Change PI
- Link Collaborative Proposals

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**Figure 2**  The Form Preparation screen. Project Summary with Special Characters is circled.

3. Click on the **Go** button for the Project Summary with Special Characters on the **Form Preparation** screen. The Project Summary with Special Characters File Upload screen displays (Figure 2). See Upload a File for directions.
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](#)).

![Form Preparation screen](#)

**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 displays (Figure 3) with these options:

- **Display Current Project Description**
- **Delete Current Project Description**
- **Upload a New Project Description** (This option automatically replaces the already uploaded file.)
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)
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. The text box entry function for Biographical Sketch information has been disabled, therefore you should 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.(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.(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 7742436](image)

**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.f** 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

**Figure 1**  
**Form Preparation** screen. Select the Biographical Sketches Go button.

**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**

**Submit Each Biographical Sketch Separately**

1. Access the **Assigned Personnel** screen (Figure 1) (see Work on Biographical Sketches).

![Figure 1](assigned_personnel_screen.png)

**Figure 1**  
Assigned Personnel screen. The Go button for a Senior Person is circled.

2. Click the Go button next to the name of the person whose Biographical Sketch you are submitting. The **Biographical Sketch** screen provides the option to upload a Biographical Sketch.

![Figure 2](bio_sketch_screen.png)

**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**).

![Image of Biographical Sketch screen]

**Figure 1** Biographical Sketch screen. Select the 'Browse' and then the 'Upload' button

2. Click the **Transfer File** button (Figure 1). The **Bio Sketch File Upload** screen displays (Figure 2). See **Upload a File** for directions.

When you have accepted the upload, the **Bio Sketch File Upload** screen displays (Figure 2) with these new options:
1. Display Current Bio Sketch
2. Delete Current Bio Sketch

![Image of Bio Sketch File Upload screen]
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**  *Form Preparation screen. Select the Go button for Current and Pending Support.*

2. On the *Form Preparation* screen (Figure 1), click the Go button for Current and Pending Support (Figure 1). The *Current and Pending Support* screen displays (Figure 2). The right side of the screen lists the PI, Co-PIs, and other Senior Personnel assigned to the proposal. You must report on current and pending support for each individual listed.
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
Figure 1   Form Preparation screen. Select the Go button for Current and Pending Support.

2. On the Form Preparation screen (Figure 1), click the Go button for Current and Pending Support (Figure 1). The Current and Pending Support screen displays (Figure 2). The right side of the screen lists the PI, Co-PIs, and other Senior Personnel assigned to the proposal. You must report on current and pending support for each individual listed.

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

Submit Current and Pending Support for Each Individual Separately

1. Access the **Current and Pending Support** screen (Figure 1) (see Work on Current and Pending Support).

   ![Current and Pending Support form screen. The New Form button is circled.](image)

   **Figure 1** Current and Pending Support form screen. The New Form button is circled.

2. Click the radio button for the person whose support you want to report (Figure 1).
3. Click the **New Form** button (Figure 1). The **Current and Pending Support Form** screen displays (Figure 2). You have two options for submitting the report:

   - **Enter the information on the Current and Pending Support form**
   - **Upload a file with all the Current and Pending Support information for that individual**

   ![Figure 2](current-and-pending-support-form.jpg) **Figure 2** Current and Pending Support form for a Senior Person. Enter the Information in the Current and Pending Support Form

1. Access the **Current and Pending Support Form** screen (Figure 1)

   ![Figure 1](current-and-pending-support-form-screen.jpg) **Figure 1** Current and Pending Support Form screen for a Senior Person. The Save Text button is circled.
2. In the Project Proposal Title box (Figure 1), type the proposal title.
3. In the Source of Support box (Figure 1), type the source of support.
4. In the Project Location box (Figure 1), type the location of the project.
5. In the Total Award Amount (Figure 1), type the total amount of the award (no dollar sign, no commas).
6. In the Start Date box (Figure 1), type the start date (in mm/dd/yyyy format).
7. In the End Date box (Figure 1), type the end date (in mm/dd/yyyy format).
8. Under Support Type (Figure 1), click the radio button for the type of support.
9. Under Person-Months Per Year Committed to the Project (Figure 1), type the Calendar months, the Academic months, and the Summer months in the boxes.
10. Click the Save Text button (Figure 1). A screen displays (Figure 2) with confirmation that FastLane has saved the data.

![Data for Current and Pending Support form for Casey Batt saved.](image)

Figure 2 Screen with the message that the data has been saved.

11. Click the OK button (Figure 2). The Current and Pending Support screen displays (Figure 3) with the report listed in the Existing Support Forms section.

![Current and Pending Support](image)

Figure 3 Current and Pending Support screen with the report for a Senior Person highlighted under Existing Support Forms.

12. Repeat the process for each project that a listed individual is involved in.

### Edit a Current and Pending Support Form

1. Access the Current and Pending Support screen (Figure 1) (see Work on Current and Pending Support).
Current and Pending Support

IMPORTANT NOTE: Each individual’s Current and Pending Support information must be uploaded as a single PDF file or inserted as text associated with that individual.

Existing Support Forms

Current PI, Co-PIs, and Senior Personnel

Figure 1  Current and Pending Support screen. The Edit button is circled.

2. In the Existing Support Forms section (Figure 1), highlight the report that you want to edit that was entered in the Current and Pending Support Form screen (Project Title).
3. Click the Edit button (Figure 1). The Current and Pending Support Form screen displays (Figure 2).

Figure 2  Current and Pending Support Form screen. The Save Text button is circled.

4. Edit the report as you require (Figure 2).
5. Click the Save Text button (Figure 2). A screen displays (Figure 3) with confirmation that FastLane has saved the data.
Figure 3  
**Screen with the message that the data has been saved.**

6. Click the OK button (Figure 3). The **Current and Pending Support** screen displays  (Figure 1).

Upload a File with Current and Pending Support for an Individual

1. Create a word-processing document that lists the current and pending support by project/proposal for an individual (see **Acceptable Formats for FastLane** for a listing of all the formats FastLane accepts). We encourage you to report using these fields for each project/proposal for a person:
   - Project/proposal title
   - Source of support
   - Project location
   - Total award amount
   - Starting date
   - Ending date
   - Support type—current, pending, submission planned in near future, or transfer of support
   - Person-months per year committed to the project—calendar, academic, and summer

2. Access the **Current and Pending Support** screen (Figure 1) (see **Work on Current and Pending Support**).

**Current and Pending Support**

**IMPORTANT NOTE**: Each individual’s Current and Pending Support information must be uploaded as a single PDF file or inserted as text associated with that individual.

Figure 1  
**Current and Pending Support screen. The New Form button is circled.**

3. In the **Current PI, Co-PIs, and Senior Personnel** section (Figure 1), click the radio button for the individual’s name.

4. Click the New Form button (Figure 1). The **Current and Pending Support Form** screen displays (Figure 2).
5. Click the **Transfer File** button (Figure 2). The **Current and Pending Support File Upload** screen displays (Figure 3).

6. Upload the file. See [Upload a File](#) for directions.
When you have accepted the upload, the **Current and Pending Support File Upload** screen displays (Figure 4) with these new options:

- **Display Current and Pending Support**
- **Delete Current and Pending Support**

### Current and Pending Support

In addition to PDF files, users can now upload a variety of word-processor files and PostScript files. These files will automatically be converted to PDF format. Follow this link for a list of [Supported file formats](#) (Opens new window).

Follow this link for [New Upload Instructions](#) (Opens new window).

Note: Clicking on the Display Current and Pending Support button will display a PDF document in this window. Once you have reviewed the document, click on the browser's "Back" button to return to this page.

![Current and Pending Support File Upload screen](image)

**Figure 4**  
**Current and Pending Support File Upload screen with options to Display and Delete current files.**

#### Display Current and Pending Support

Click the **Display 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 and Pending Support

1. Click the **Delete 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).

![Form Preparation screen](image)

**Figure 1** Form Preparation screen. The Go button for Data Management Plan is circled.
2. Click the Go button for Data Management Plan on the Form Preparation screen (Figure 1). The Data Management Plan Upload screen displays (Figure 2).

![Data Management Plan](image)

**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](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
FastLane Help

**Mentoring Plan Upload** screen displays (Figure 4).

![Mentoring Plan](image)

**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).
2. Click the Go button for RAISE - Program Officer Concurrence Emails on the Form Preparation screen (Figure 3). The RAISE - Program Officer Concurrence Emails Upload screen displays (Figure 4).
Figure 4 RAISE - Program Officer Concurrence Emails Upload screen with browse field.

3. See Upload a File instructions to upload a RAISE - Program Officer Concurrence Emails

Work on Other Supplementary Documents

The types of Other Supplementary Documents are described in the PAPPG Chapter II.C.2.j.

1. Access the Form Preparation screen (Figure 5) (see Create a New Proposal, Edit a Proposal, or Create a New Proposal from a Template).
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.

**Figure 6**  
Other Supplementary Docs screen with text box.

You have these options:
FastLane Help

- Enter the Other Supplementary Document in the text box
- Upload the Other Supplementary Document

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).
Figure 2  Data Management Plan Upload screen with browse field.

3.  See Upload a File instructions to upload a Data Management Plan.

Work on Mentoring Plan

1.  Access the Form Preparation screen (Figure 3) (see Create a New Proposal or Edit a Proposal).

Figure 3  Form Preparation screen. The Go button for Mentoring Plan is circled.

2.  Click the Go button for Mentoring Plan on the Form Preparation screen (Figure 3). The Mentoring Plan Upload screen displays (Figure 4).
FastLane Help

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).
Figure 4  \hspace{1cm} 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](#)).
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).
RAISE - Program Officer Concurrence Emails

In addition to PDF files, users can now upload a variety of word-processor files and PostScript files. These files will automatically be converted to PDF format.

Follow this link for a list of Supported file formats (Opens new window).

Follow this link for New Upload Instructions (Opens new window).

Enter the name and location of the file to upload
or click on the Browse button to select the file to upload

Browse... No file selected.

Upload File

Go Back

Figure 4 RAISE - Program Officer Concurrence Emails Upload screen with browse field.

3. See Upload a File instructions to upload a RAISE - Program Officer Concurrence Emails

Work on Other Supplementary Documents

The types of Other Supplementary Documents are described in the PAPPG Chapter II.C.2.j.

1. Access the Form Preparation screen (Figure 5) (see Create a New Proposal, Edit a Proposal, or Create a New Proposal from a Template).
2. Click the Go button for Other Supplementary Docs on the Form Preparation screen (Figure 5). The Other Supplementary Docs screen displays (Figure 6).

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

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.png)

**Figure 1** Other Supplementary Docs screen. The Save Text button is circled.

2. Type in or copy and paste the Supplementary Document in the text box (Figure 1).

3. Click the Save Text button (Figure 1). A screen displays (Figure 2) with the message that the Supplementary Document data is saved.

![Figure 2](message-screen.png)

**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).
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**
- **Delete 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**).
FastLane Help

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.](image)

**Delete a Senior Person**

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

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

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

Supplementary Documents

- Data Management Plan
- Mentoring Plan
- Project Summary with Special Characters
- Other Supplementary Documents

Single Copy Documents

- Collaborators and Other Affiliations
- Deviation Authorization (if applicable)
- List of Suggested Reviewers
- Additional Single Copy Documents

Add/Delete Non-Co-PI Senior Personnel

Add/Delete Non-Co-Principal Investigator (Co-PI) Senior Personnel Assigned to Proposal

To Delete a Non Co-PI Senior Personnel assigned to Proposal #7200408 select the person's name from the list below and press the 'Delete Non Co-PI Senior Person from Proposal' button.

Select a name to remove as a Senior Personnel.

To Add a new Non Co-PI Senior Personnel to proposal #7200408, type the name of the person in the fields below and click the 'Add Non Co-PI Senior Person to Proposal' button:

- First Name
- Middle Initial
- Last Name

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](image)

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](image)

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).
Figure 1  **Form Preparation screen. The Go button next to Change PI is circled.**

2. Click the **Go** button for Change PI (Figure 1). The **Change PI on Proposal** screen displays (Figure 2) and lists all the Co-PIs on the proposal.

Figure 2  **Change PI on Proposal screen. The Change PI button is circled.**

3. Highlight the name of the person you want to designate PI from the list of Co-PIs (Figure 2).
4. Click the **Change PI** button (Figure 2). A screen displays (Figure 3) with a warning that you are about to change the PI of the proposal.
FastLane Help

**Figure 3**  Screen with a warning that you are about to change the PI.

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

**Figure 4**  Screen with the message that the PI has been changed.

6. Click the **OK** button (Figure 4). The **Change PI on Proposal** screen displays (Figure 5). This time, the former PI is on the list of Co-PIs, and the new PI’s name is no longer on the list.

**Figure 5**  Change PI on Proposal screen with the original PI now listed as the Co-PI.

**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:
What Is Link Collaborative Proposals?

In this section, you can link your temporary proposal with other temporary proposals. This gives NSF the ability to evaluate and consider the lead and non-lead proposals together.

Linking your proposal to another temporary proposal results in the deletion in the non-lead linked proposal of:

- Project Summary
- Project Description
- References Cited

You may link your proposal to as many other temporary proposals as you require. You have these options in Link Collaborative Proposals:

- Link a temporary proposal
- Delete a link between proposals

Link a Temporary Proposal

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 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).

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.

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

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

Figure 1  Form Preparation screen. The Go button for Link Collaborative Proposals is circled.

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.

![Delinked proposal](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>
</table>

248
| II | Investigator Status | Select the current status of the PI or Co-PI on federal grants. | Assists analysis of research requests as they may relate to current or past federal funding |
| III | Fields of Science Other Than Biology | Select major scientific fields, in addition to biology, involved in the proposed research. | Indicates the type and extent of interdisciplinary research reviewed in BIO |
| IV | Substantive Area | Select broad or thematic areas or experimental systems related to the proposed research; BIO has no preference. | Enables BIO to monitor activity in these areas for generating reports on the research reviewed |
| V | Infrastructure | Select infrastructure, including material, intellectual, and human resources necessary to facilitate progress in the biological research. | Assists analysis of the adequacy of current infrastructure and identifying future infrastructural needs |
| VI | Habitat | Indicate the habit in which the experimental system being studied is normally found. | Assists analysis of the environmental breadth of the research reviewed in BIO |
| VII | Geographic Area of Research | Indicate research-related region (not the location of your organization). | Provides data on geographic distribution of regions and organisms involved in research reviewed in BIO |
| VII | Classification of Organisms | Indicate the most specific taxonomic category represented in the research. Check the next- higher level if the appropriate taxonomic level is absent. | Assists analysis of the biological diversity of research reviewed in BIO |
| VIII | Model Organism | Indicate traditional laboratory model species. | Gives an estimate of how frequently traditional laboratory species are used in research requests |

You must choose at least one descriptor in each of the categories listed unless the form indicates **No Selection Required**. Choose the most specific descriptors.

*If no descriptors apply for the proposal, select Not Appropriate or None of the Above.* If you have further questions, direct your queries to BIO as follows:

- For procedural questions on instructions for the Proposal Classification Form, contact the Information and Automation Resources Unit, BIO at biofl@nsf.gov.
- For questions on the substance and scientific review of the proposal, contact the relevant NSF Program Officer.
- For information on BIO, its staff, and related programs, click [http://www.nsf.gov/bio](http://www.nsf.gov/bio) to go to the BIO Web site.

**What Is the Proposal Classification Form?**

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<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</td>
<td>Assists analysis of the adequacy of current infrastructure and</td>
</tr>
<tr>
<td>V</td>
<td>Habitat</td>
<td>Indicate the habitat 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 to go to the BIO Web site.

**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).

![Form Preparation screen. The Go button for the Cover Sheet is circled.](Image)
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).
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).
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).
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.
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.

![Proposal Classification Form](image)

**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).
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.

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
FastLane Help

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).

![Category IV: Infrastructure (Select 1 to 3)](image)

**Figure 3** Category IV section of the Proposal Classification screen. The What button and the Why button are circled.

**Save the Proposal Classification Form**

When you are finished working on the form, at the bottom of the Proposal Classification Form screen (Figure 4), you have these options:

- Save the responses
- Cancel changes
- Clear all entries

![Save your responses, Cancel changes, Clear all entries](image)

**Figure 4** Lower portion of the Proposal Classification Form screen with the option buttons. The OK button is circled.

**Save the Responses**

At the bottom of the Proposal Classification Form screen (Figure 4), click the OK button. FastLane saves the changes. If you have not completed the form, the Proposal Classification screen displays (Figure 5) with a message at the top of the screen on what you must do to complete the form for submission.
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.

4. For Category III (Figure 4), select the radio button for the appropriate selection for substantive area.
may select one to four items.

5. For Category IV (Figure 5), select the radio button for the appropriate selection for infrastructure. You may select one to three items.

6. For Category V (Figure 6), select the radio button for the appropriate selection for habitat. You may select one to two items.
<table>
<thead>
<tr>
<th>General Terrestrial</th>
<th>Savannah</th>
<th>Chapparal/Sclerophyll/Shrublands</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tundra</td>
<td>Thomwoods</td>
<td>Alpine</td>
</tr>
<tr>
<td>Boreal Forest</td>
<td>Deciduous Forest</td>
<td>Montane</td>
</tr>
<tr>
<td>Temperate</td>
<td>Coniferous Forest</td>
<td>Cloud Forest</td>
</tr>
<tr>
<td>Deciduous Forest</td>
<td>Desert</td>
<td>Riparian Zones</td>
</tr>
<tr>
<td>Temperate</td>
<td>Tropicsal</td>
<td>Islands (except Barrier Islands)</td>
</tr>
<tr>
<td>Rain Forest</td>
<td>Rain Forest</td>
<td></td>
</tr>
<tr>
<td>Mixed Forest</td>
<td>Seasoud Forest</td>
<td></td>
</tr>
</tbody>
</table>
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.
Submit and Sign 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)

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

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).
FastLane Help

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).

Figure 1    Research Administration screen. The Proposals/Supplements/File Updates/Withdrawals link is circled.

2. Click Proposals/Supplements/File Updates/Withdrawals (Figure 1). The
**Proposals/Supplements/File Updates/Withdrawals** screen displays at the **Documents in Progress** tab (Figure 2).

![Figure 2](image)

**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).
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

Figure 1  Research Administration screen. The Proposals/Supplements/File Updates/Withdrawals link is circed.

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 circed.
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.

![Proposal Errors/Warnings screen](image)

**Figure 3** Upper portion of the Proposal Errors/Warnings screen for the proposal if the proposal is ready for submission.

### Sign and Submit the Proposal

*If you have AOR permissions*, you have the capability to sign and submit the proposal.

1. In the **Debarment and Suspension** section of the **Proposal Errors/Warnings** screen (Figure 4), click the radio button for Yes or No if there are any debarments or suspensions of you or of your organization from transactions with federal agencies.

    **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.)

    ![Debarment and Suspension Certification](image)

    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 4** Debarment and Suspension Certification section of the Proposal Errors/Warnings screen.

2. *If you answered Yes*, in the text box under the radio buttons (Figure 4), type an explanation.

3. In the **Institution Information** section of the **Proposal Errors/Warnings** screen (Figure 5), check the
accuracy of the information for your organization.

**Institution Information**

| DUNS Number: 11111111 | DUNS Qualifier: |

Authorized Organizational Representative (AOR) information will be added when electronically signed by AOR.

The following authorized organizational representative (AOR) information will be printed on the proposal cover sheet after the proposal is electronically signed by AOR. If this information is incorrect, please have it modified before signing the proposal electronically. This information can be modified by an authorized user at your organization using the 'Add, Modify, and Delete FastLane Users’ module of ‘Research Administration’ application.

Name: Alan Alphaman
Phone: 7032925400
Fax: 7032925500
E-mail: kcheffie@nsf.gov

You have the Authorized Organizational Representative (AOR) permission to electronically sign and submit the proposal.

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

4. At the bottom of the Proposal Errors/Warnings screen (Figure 5), click the Sign and Submit button. The Proposal Submission Confirmation screen displays (Figure 6) with a message that the proposal has been successfully submitted to NSF. It also displays the official NSF number for the proposal.

**Figure 6** Proposal Submission Confirmation screen with the message that the proposal has been submitted to NSF and with the NSF number for the proposal.

5. Write down the NSF proposal number.
6. Click the OK button (Figure 6). The Proposals/Supplements/File Updates/Withdrawals screen displays on the Documents in Progress tab (Figure 2).

**Return a Proposal to the PI**

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

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/Supplements/File Updates/Withdrawals screen](image)

Figure 2 Proposals/Supplements/File Updates/Withdrawals screen on the Documents in Progress tab. The Return to PI link is circled.

3. Click Return to PI (Figure 2) on the row for the proposal you want to return. A screen displays (Figure 3) with a message for you to confirm this action.
FastLane Help

Figure 3  Screen with the message for you to confirm that you want to return the proposal to the PI.

4. Write a note to the PI in the text box (Figure 3) (optional). Once you return the proposal to the PI, you no longer have access to the proposal as an SPO.
5. Click the OK button (Figure 3). A screen displays (Figure 4) with the message that the proposal has been returned to the PI.

Figure 4  Screen with a message that the proposal has been returned to the PI.

6. Click the OK button (Figure 4). The Proposals/Supplements/File Updates/Withdrawals screen displays on the Documents in Progress tab (Figure 2).

AOR Functions
Access AOR Functions

1. If you are an Authorized Organizational Representative (AOR) and need to sign a proposal that has been submitted to NSF, on the FastLane Home Page screen, log into Research Administration (see SPO AOR Login). The Research Administration screen displays (Figure 1).
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.
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).

![Research Administration Screen](image)

**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.

![Authorized Organizational Representative Functions Screen](image)
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.](image)

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

### Sign a Single Proposal

1. Access the Authorized Organizational Representative Functions screen (Figure 1) (see Access AOR Functions).

![Figure 1 - Authorized Organizational Representative Functions screen. The check box for signing a proposal is circled.](image)

2. Click the check box next to the proposal you want to electronically sign (Figure 1).
3. Click the Sign button (Figure 1). The Electronic Signature Notice screen displays (Figure 2).
Figure 2  Electronic Signature Notice screen. The Debarment and Suspension Certification section is boxed, and the Sign button is circled.

4. In the Debarment and Suspension Certification section of the Electronic Signature Notice screen (Figure 2), click the radio button for Yes or No to indicate if you are presently debarred, suspended, declared ineligible, or voluntarily excluded from covered transactions by any Federal department or agency.

5. If you answered Yes, type an explanation in the text box below the radio buttons (Figure 2).

6. Click the Sign button (Figure 2) to confirm your acceptance of the conditions. The Confirmation screen displays (Figure 3) with a message that the proposal has been signed.

Figure 3  Confirmation screen with a message that the proposal has been signed.

7. Click Return to AOR Functions Main (Figure 3). The Authorized Organizational Representative
Functions screen displays (Figure 1).

Sign Several Documents at Once

1. Access the Authorized Organizational Representative Functions screen (Figure 1) (see Access AOR Functions).

![Figure 1 Authorized Organizational Representative Functions screen. The Sign button is circled.](image)

2. Select the documents you want to sign by any one of the following options (Figure 1):
   - Click the box next to Check to Select All Proposals/Supplements to sign only the proposals and supplements listed.
   - Click the box next to Check to Select All Documents to sign all documents listed.
   - Click the check mark box next to each document that you want to sign.

3. Click the Sign button (Figure 1). The Electronic Signature Notice screen displays (Figure 2).
Figure 2  Electronic Signature Notice screen. The Sign button is circled.

4. In the Debarment and Suspension Certification section of the Electronic Signature Notice screen (Figure 2), click the radio button for Yes or No to indicate if you are presently debarred, suspended, declared ineligible, or voluntarily excluded from covered transactions by any Federal department or agency.

5. If you answered Yes, type an explanation in the text box below the radio buttons (Figure 2).

6. Click the Sign button (Figure 2) to confirm your acceptance of the conditions. The Confirmation screen displays (Figure 3) with a message that the proposals have been signed.
Update a Submitted Proposal

Update a Submitted Proposal Introduction

It is the responsibility of the proposing organization to thoroughly review each proposal before the proposal’s submission. On occasion, however, a problem is identified with a portion of the proposal after the proposal has been submitted electronically to NSF.

The FastLane Proposal File Update Module allows the organization to request the replacement of files or revision of other Proposal Attributes, associated with a previously submitted proposal. Further information on this process can be found in the PAPPG

Roles in Proposal File Update

As a PI, you can:
- Create a Proposal File Update
- View and edit an update
- View the Update Summary
- Create an update PIN
- Allow SPO access to an update
- 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).
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).
Figure 5  Proposal Update Control screen. The View/Edit Update button is circled.

7. Click the View/Edit Update button (Figure 5). The Proposal Update Form Preparation screen displays (Figure 6). This screen lists all the sections of the proposal; you can update any section except the Postdoctoral Mentoring Plan.
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.

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

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
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.
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](http://example.com/adobe_reader). If you no longer need to view the document, click on the browser’s “Back” button to return to the page.

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](http://example.com/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](http://example.com/fastlane_formats) and [Upload a File](http://example.com/upload) 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).
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.

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).
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
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.
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).
Proposal Update Summary

Proposal Number: 0420108
Title: Funds for Children of the Corn
Update Number: 1
Update Status: Initiated, SPO Access Not Allowed

PI Name: Alan Alphama
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)

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).
2. Click the Create Update PIN button (Figure 1). The Proposal File Update PIN Control screen displays (Figure 2).

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.

```
Please confirm that you wish to delete the Proposal File Update for Proposal No. 0420108. This action is irreversible.
```

![Figure 2 Screen](image)

**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.

```
The Proposal File Update Request has been deleted.
```

![Figure 3 Screen](image)

**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](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.

![Confirmation Screen](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.
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 3  Access to Proposal File Update Has Been Given to Your SPO screen.

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](image1.png)

*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](image2.png)

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

3. Click **Proposal File Update** (Figure 2). The List of Proposals Eligible for Update screen displays (Figure 3).
Figure 3  List of Proposals Eligible for Update screen. The Continue button is circled.

4. Highlight the proposal whose update you want to view in the List of Proposals Eligible for Update (Figure 3).
5. Click the Continue button (Figure 3). The Proposal Update Control screen for that proposal displays (Figure 4) with a list of the updates that the SPO has access to in the Forward Updates list, along with their NSF acceptance status. You have these options for working with updates that the SPO has access to:
   • View the Update Summary for a forwarded update
   • Remove SPO access to an update
   • View and print an updated proposal if the update has automatically approved status

Proposal Update Control

Proposal Number: 0420108
Title: Funds for Children of the Corn

A request for a proposal file update automatically will be accepted if submitted prior to:

• the deadline date specified in a program solicitation;
• initiation of external peer review in cases when a target date is utilized, and
• initiation of external peer review in the case of an unsolicited proposal.

Forwarded Updates

1 - Allow SPO Submit

View Update Summary Remove SPO Access
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).

   ![](image1.png)

   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).
FastLane Help

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

![Proposal Functions](image)

**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).

![List of Proposals Eligible for Update](image)

**Figure 3** List of Proposals Eligible for Update screen. The Continue button is circled.

4. Highlight the proposal whose update you want to view in the List of Proposals Eligible for Update (Figure 3)
5. Click the Continue button (Figure 3). The Proposal Update Control screen for that proposal displays (Figure 4) with a list of the updates that the SPO has access to in the Forward Updates list, along with their NSF acceptance status. You have these options for working with updates that the SPO has access to:
• View the Update Summary for a forwarded update
• Remove SPO access to an update
• View and print an updated proposal if the update has automatically approved status

**Figure 4** Proposal Update Control screen after the SPO has been given access to a Proposal File Update.

View the Update Summary for a Forwarded Update

1. Access the Proposal File Update Control screen (Figure 1) (see Work with Forwarded Updates).
2. Highlight in the Forwarded Updates list (Figure 1) the update whose Update Summary you want to view.

3. Click the View Update Summary button (Figure 1). The Proposal Update Summary screen displays (Figure 2). You have these options:
   - View the current section, the section as it was first submitted to NSF
   - View the proposed replacement section, the section as it has been updated
   - View the justification Note for the update
Figure 2  Proposal Update Summary screen. The View Current Section button is circled.

**View the Current Section**

1. On the Proposal Update Summary screen (Figure 2), in the box listing the updated sections, click the radio button for the current section you want to view.
2. Click the View Current Section button (Figure 2). The form displays in PDF format. If you need to download Adobe Reader, see Adobe Reader for FastLane.
3. Click the back button on the browser to return to the Proposal Update Summary screen (Figure 2).

**View the Proposed Replacement Section**

1. On the Proposal Update Summary screen (Figure 3), in the box listing the updated sections, click the radio button for the updated section that you want to view.
2. Click the View Proposed Replacement Section button (Figure 3). The section displays in PDF format. If you need to download Adobe Reader, see Adobe Reader for FastLane.

3. Click the back button on the browser to return to the Proposal Update Summary screen (Figure 3).

**View the Justification Note**

1. On the Proposal Update Summary screen (Figure 4), click the View Proposal Update Justification Note button. The Justification Note screen displays (Figure 5).
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)

View Current Section View Proposed Replacement Section
View Proposal Update Justification Note

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.

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 3** View Submitted Proposal screen.

5. Click the Go button for the section you want to view. The section displays in PDF format. If you need to download Adobe Acrobat, see Adobe Reader for FastLane.

6. Click the Print icon on the Adobe toolbar to print the section.

7. Click the browser back button to return to the View Submitted Proposal screen (Figure 3).

8. To print the entire proposal, on the View Submitted Proposal screen (Figure 3), click the Go button for Print Entire Proposal. FastLane concatenates the files for the proposal and prints the proposal as one PDF document.
FastLane Help

**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](image1.png)

**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](image2.png)

**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. 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).

![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).
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.

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:
Work with Forwarded Proposal File Updates

Work on Forwarded Proposal File Updates as an SPO

1. On the FastLane Home Page screen, log into Research Administration as an SPO (see SPO/AOR Login). The Research Administration screen (Figure 1) displays.

   Figure 1  Research Administration screen. The Proposals/Supplements/File Updates/Withdrawals link is circled.

2. Click Proposals/Supplements/File Updates/Withdrawals (Figure 1). The Proposals/Supplements/File Updates/Withdrawals screen displays (Figure 2) with these tabs:
   - The Documents in Progress tab screen shows all the documents of your organization that are now in progress.
   - The Withdrawals in Progress tab screen shows any proposal withdrawals that have been forwarded to the SPO.
   - The Submitted Documents tab screen shows all the documents that have been submitted to NSF, including submitted Proposal File Updates.
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

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 3**  Documents in Progress tab on the Proposals/Supplements/File Updates/Withdrawals screen with the updates (boxed in red) now grouped together.

**View the Update Summary as an SPO/AOR**

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

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

2. Click the Temp ID number (Figure 1) for the Proposal File Update that you want to view the Update Summary for. The Proposal Update Summary screen displays (Figure 2) with the status of the update. On the Proposal Update Summary screen, you have these options:
   - **View the current section**, the section as it was originally submitted to NSF
   - **View the proposed replacement section**, the section as it has been updated
   - **View the Justification Note** for the update
1. On the Proposal Update Summary screen (Figure 2), in the box listing the updated sections, click the radio button for the current section you want to view.
2. Click the View Current Section button (Figure 2). The section displays in PDF format. If you need to download Adobe Reader, see Adobe Reader for FastLane.
3. Click the back button on the browser to return to the Proposal Update Summary screen.

View the Proposed Replacement Section

1. On the Proposal Update Summary screen (Figure 3), click the radio button for the updated section you want to view.
Figure 3    Proposal Update Summary screen. The View Proposed Replacement Section button is circled.

2. Click the View Proposed Replacement Section button (Figure 3). The section displays in PDF format. If you need to download Adobe Acrobat, see Adobe Reader for FastLane.

3. Click the back button on the browser to return to the Proposal Update Summary screen (Figure 3).

View the Justification Note

1. On the Proposal Update Summary screen (Figure 4), click the View Proposal Update Justification Note button. The Justification Note screen displays (Figure 5).
**Figure 4**  Proposal Update Summary screen. The View Proposal Update Justification Note button is circled.

**Figure 5**  Justification Note screen. The OK button is circled.
2. Click the OK button (Figure 5). The Proposal Update Summary screen displays (Figure 4).

Check a Proposal File Update for Completeness

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

Figure 1 Proposals/Supplements/File Updates/Withdrawals screen on the Documents in Progress tab. The Check link is circled.

2. Click Check (Figure 1) in the row for the Proposal File Update you want to check. The Proposal File Update Errors/Warnings screen is displayed with a list of proposal items that have not been completed.

Figure 2 Proposal File Update Errors/Warnings screen.
3. Click Return to List to return to the Proposals/Supplements/File Updates/Withdrawals screen.

**Edit a Proposal File Update as an SPO/AOR**

1. Access the Proposals/Supplements/File Updates/Withdrawal screen on the Documents in Progress tab (Figure 1) (see Work on Forwarded Proposal File Updates).

![Figure 1](image)

The Edit link is circled.

2. Click the Edit link (Figure 1) on the row for the Proposal File Update you want to work on. The Proposal Update Form Preparation screen displays (Figure 2) with the proposal as updated. You have these options for editing:
   - View the updated proposal
   - Edit a section (either an original section or an updated section)
   - Edit the Justification Note
Figure 2  Proposal Update Form Preparation screen. The Go button for the Project Summary is circled.

View the Updated Proposal

1. On the Proposal Update Form Preparation screen (Figure 2), click the Go button for any section. (The updated sections display in red on the Proposal Update Form Preparation screen.) The section displays in PDF format. If you need to download Adobe Reader, see Adobe Reader for FastLane.

2. Click the back button on the browser to return to the Proposal Update Form Preparation screen (Figure 2).

Edit a Section

1. Prepare on a word processor the replacement file for the section you want to replace. See Acceptable Formats for FastLane for the formats FastLane accepts.

2. On the Proposal Change Form Preparation screen (Figure 2), click the Go button for the section you want to replace. The File Upload screen displays for the section you selected, as the Project Summary File Upload
screen displays as an example (Figure 3). (See Prepare Proposal Forms for instructions for a section.)

![Figure 3](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.
Figure 4  Proposal Update Form Preparation screen with the updated Proposal Summary displayed in red and with the date that the Project Summary was changed.

*Edit the Justification Note*

1. On the Proposal Change Form Preparation screen (Figure 4), click the Proposal Update Justification Note button. The Justification Note screen displays (Figure 5) with a text box for entering your justification for the Proposal File Update.
2. Edit the Justification Note or copy and paste a new Justification in the text box (Figure 5).
3. Click the OK button (Figure 5). A screen displays (Figure 6) with the message that the update to the Justification Note is saved.

![Figure 6](image)

**Figure 6**  
Screen with the message that the update to the Justification Note has been saved. The OK button is circled.

4. Click the OK button (Figure 6). The **Proposal Update Form Preparation** screen displays (Figure 4).

**Submit a Proposal File Update (AOR Only)**

1. Access the **Proposals/Supplements/File Updates/Withdrawals** screen on the **Documents in Progress** tab (Figure 1)
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 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 Cover Sheet, the authorized Organizational Representative or Individual Applicant is providing the Debarment and Suspension Certification contained in Appendix O of the Grant Proposal Guide.

Figure 3  Debarment and Suspension Certification section of the Proposal Errors/Warnings screen.

4. If you answered Yes, in the text box under the radio buttons (Figure 3), type an explanation.

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

<table>
<thead>
<tr>
<th>Institution Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>DUNS Number: 111111111</td>
</tr>
<tr>
<td>DUNS Qualifier:</td>
</tr>
</tbody>
</table>

Authorized Organizational Representative (AOR) information will be added when electronically signed by AOR.

The following authorized organizational representative (AOR) information will be printed on the proposal cover sheet after the proposal is electronically signed by AOR. If this information is incorrect, please have it modified before signing the proposal electronically. This information can be modified by an authorized user at your organization using the “Add, Modify, and Delete FastLane Users” module of Research Administration application.

Name: Alan Alphaman
Phone: 7032955400
Fax: 7032955500
E-mail: Icheltsa@nsf.gov

You have the Authorized Organizational Representative (AOR) permission to electronically sign and submit the proposal.

Figure 4  Institution Information section of the Proposal Errors/Warnings screen. The Sign and Submit button is circled.

6. At the bottom of the Proposal Errors/Warnings screen (Figure 4), click the Sign and Submit button. The Proposal Submission Confirmation screen displays (Figure 5) with a message that the Proposal File Update has been successfully submitted to NSF.

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.

   ![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).
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)

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.
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
- 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).

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

3. Click the Submitted Documents tab (Figure 2). The Proposals/Supplements/File Updates/Withdrawals screen displays on the Submitted Documents tab (Figure 3).

4. Click the Type column header (Figure 3) to group all updates together. You have these options for working on a Proposal File Update that has already been submitted to NSF:
   - View the Update Summary for a submitted Proposal File Update
   - Withdraw a submitted Proposal File Update from NSF consideration (AOR only)
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).
Proposal Update Summary

Proposal Number: 0420102
Title: Test for Sept 1
Update Number: 1
Update Status: Automatically Accepted

PI Name: Alan Alphamaun
AOR Name: Alan alphauname
Electronically Signed Date: Sep 27 2004
Update Submitted to NSF on: Sep 27 2004
Program Officer: Not yet assigned.
Phone: N/A
Email: 
Update Processed by NSF on: Sep 27 2004

Figure 4 Proposal Update Summary screen. The View Proposal Update Justification Note button is circled.

Proposal Number: 0420102
Title: Test for Sept 1
Update Number: 1

Justification Note for the Requested Update

Type justification here.

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

**View and Print an Updated Proposal as an SPO/AOR**

1. Access the Proposal Update Summary screen (Figure 1) (see View the Update Summary of a Submitted Proposal File Update).

   ![Proposal Update Summary Screen](image1.jpg)

   **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).
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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<td>Additional Single Copy Documents</td>
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<td>GO</td>
<td>Print Entire Proposal</td>
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Figure 2 View Proposal screen. The Go button for Print Entire Proposal is circled.

3. Click the Go button for any section you want to view. The section displays in PDF format. If you need to download Adobe Acrobat, see Adobe Reader for FastLane.

4. Click the Print icon on the Adobe toolbar to print the section.

5. To print the entire proposal, click the Go button for Print Entire Proposal (Figure 2). FastLane concatenates the files for the proposal and prints the proposal as one PDF document.

Withdraw a Proposal File Update (AOR Only)

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

2. Click the Withdraw link on the row of the Proposal File Update you wish to withdraw. A screen displays (Figure 2) with a message for you to confirm that you want to remove the update from NSF consideration.

Figure 2  Screen with a message for you to confirm that you want to withdraw the submitted update. The OK button is circled.

3. Click the OK button (Figure 2). A screen displays (Figure 3) with the message that the Proposal File Update has been withdrawn.

Figure 3  Screen with the confirmation message that the Proposal File Update has been withdrawn from NSF consideration.

4. Click the OK button (Figure 3). The Proposals/Supplements/File Updates/Withdrawals screen on the Submitted Documents tab displays (Figure 1).

*If NSF has already processed the update, you may no longer withdraw it. When you click Withdraw on the row for that proposal on the Submitted Documents tab of the Proposals/Supplements/File Updates/Withdrawals screen, a screen displays (Figure 4) with the message that the update has already been processed.*
Figure 4 Screen with the message that NSF has already processed the update. The OK button is circled.

Click the OK button (Figure 4). The Proposals/Supplements/File Updates/Withdrawals screen displays on the Submitted Documents tab (Figure 1).

Sign a Proposal File Update

1. On the FastLane Home Page screen, log into Research Administration as an Authorized Organizational Representative (see AOR Login). The Research Administration screen displays (Figure 1).
Figure 1  Research Administration screen. The Authorized Organizational Representative Functions link is circled.

2. Click Authorized Organizational Representative Functions. The Authorized Organizational Representative Functions screen displays (Figure 2).
3. Verify that the Signature Information is correct. If you need to change it, click Account Management (Figure 2) (see Access Accounts Management, Step 2 for instructions).

4. Click the check mark box in the Sign column (Figure 2) on the row for the Proposal File Update that you want to sign.

5. Click the Sign button (Figure 2). The Electronic Signature Notice screen displays (Figure 3) with the Certification Information for the AOR.

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

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 submitted proposal by role:

- **As a PI**
- **As an SPO/AOR**

**Check Status as PI**

Check the Status of a Submitted Proposal as a PI

You can check the status of a submitted proposal. To check proposal status as an SPO/AOR, see [Check the Status of a Submitted Proposal as SPO/AOR](#).

1. Access the **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management** screen (Figure 1) (see **PI/Co-PI Login**).

### 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. 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).

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

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

3. Click Proposal Status (Figure 2). The Proposal Status screen displays (Figure 3) with a listing of proposals for which you are PI or Co-PI in the All Proposals by Status section. The proposal status displays in the Status column.
4. Click on the proposal number (Figure 3) on the row for a proposal to see more information on status. The Proposal Detail screen displays (Figure 4) with an option to view any reviews or Panel Summary for your proposal (see View the Panel Summary and Reviews of a Proposal for instructions.)

If your proposal is for the NSF Biological Sciences division and you submitted a Proposal Classification Form with your proposal, the Proposal Details screen displays with an option to View/Print the Proposal Classification Form (Figure 5).
Click **View/Print Proposal Classification Form** (Figure 5). The Proposal Classification Form displays in PDF format. If you need Adobe Reader, see [Adobe Reader for FastLane](#).

**NSF Program Information**

- **NSF Division:** Division of Molecular and Cellular Biosciences
- **NSF Program:** Eukaryotic Genetics
- **Program Officer:** Susan Porter Ridley
- **PO Telephone:** (703) 292-8439
- **PO Email:** sridley@nsf.gov
- **Proposal Classification Form:** Submitted

> View/Print Proposal Classification Form

**Figure 5** NSF Program Information section of the Proposal Details screen with the link to View/Print Proposal Classification Form.

**Check the Status of a Submitted Proposal as a PI**

You can check the status of a submitted proposal.

To check proposal status as an SPO/AOR, see [Check the Status of a Submitted Proposal as SPO/AOR](#).
1. Access the Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management screen (Figure 1) (see PI/Co-PI Login).

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

**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 Status link is circled.

3. Click Proposal Status (Figure 2). The Proposal Status screen displays (Figure 3) with a listing of proposals for which you are PI or Co-PI in the All Proposals by Status section. The proposal status displays in the Status column.

Figure 3  Proposal Status screen. The proposal number is circled for a proposal.

4. Click on the proposal number (Figure 3) on the row for a proposal to see more information on status. The Proposal Detail screen displays (Figure 4) with an option to view any reviews or Panel Summary for your proposal (see View the Panel Summary and Reviews of a Proposal for instructions.)
Figure 4  Proposal Detail screen. The Proposal Status and Reviews sections are circled.

If your proposal is for the NSF Biological Sciences division and you submitted a Proposal Classification Form with your proposal, the Proposal Details screen displays with an option to View/Print the Proposal Classification Form (Figure 5). Click View/Print Proposal Classification Form (Figure 5). The Proposal Classification Form displays in PDF format. If you need Adobe Reader, see Adobe Reader for FastLane.

NSF Program Information

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<td>Eukaryotic Genetics</td>
</tr>
<tr>
<td>Program Officer:</td>
<td>Susan Porter Ridley</td>
</tr>
<tr>
<td>PO Telephone:</td>
<td>(703) 292-8439</td>
</tr>
<tr>
<td>PO Email:</td>
<td><a href="mailto:sridley@nsf.gov">sridley@nsf.gov</a></td>
</tr>
<tr>
<td>Proposal Classification Form:</td>
<td>Submitted</td>
</tr>
</tbody>
</table>

> View/Print Proposal Classification Form

Figure 5  NSF Program Information section of the Proposal Details screen with the link to View/Print Proposal Classification Form.

View the Panel Summary and Reviews of a Proposal

1. Access the Proposal Detail screen (Figure 1) (see Check the Status of a Submitted Proposal as a PI). If your proposal is in the Review process, the Review section of the Proposal Detail screen displays a list of reviews and Panel Summary for the proposal.
FastLane Help

The links to the Panel Summary and reviews are circled in the Reviews section.

2. To see the Panel Summary, in the Review section, click Panel Summary (Figure 2). The Panel Summary screen displays (Figure 3) for you to view the Panel Summary.
Figure 3  Panel Summary screen.

3. To see a review, click a Review link (Figure 4). The Review screen displays (Figure 5) with one of the reviews of your proposal.
Check the Status of a Submitted Proposal as an SPO/AOR

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

2. Click Organizational Reports (Figure 1). The Organizational Reports screen displays (Figure 2).
3. Click the radio button for Recent Proposals (Figure 2).
4. Click the **Continue** button (Figure 2). The **Recent Proposals** screen displays (Figure 3).

   ![Organizational Reports screen](image)

   **Figure 2** Organizational Reports screen with the radio button for Recent Proposals selected. The Continue button is circled.

5. In the **Status** section (Figure 3), click the radio button for All.
6. Add none, one, or any combination of the following search criteria (Figure 3):

   ![Recent Proposal screen](image)

   **Figure 3** Recent Proposal screen. The radio button for Status and the Continue button are circled.
FastLane Help

- In the **Date of Most Recent Change** box, type the date of the most recent change in **mm/dd/yyyy** format.
- In the **Proposal Number** box, type the number of the proposal you want to check on if it is.
- In the **PI's Last Name** box, type the PI's last name.

7. In the **Sort Results by** section (Figure 3), click the radio button for **Status**.
8. Click the **Continue** button (Figure 3). The **Recent Proposals Search Results** screen displays (Figure 4) with the status listed for the proposals matching your search criteria.

![Recent Proposals Search Results](image)

**Figure 4** Recent Proposal Search Results screen.

**View/Print a Submitted Proposal**

**View and Print a Submitted Proposal Introduction**

View and print a submitted proposal by role:

- **As a PI**
- **As an SPO/AOR**

**View and Print a Submitted Proposal Introduction**

View and print a submitted proposal by role:

- **As a PI**
- **As an SPO/AOR**

**View and Print a Submitted Proposal as a PI**

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

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

Figure 3  Principal Investigator (PI) Information screen. The View Submitted button is circled.

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

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

5. Highlight the proposal you want to view in the Submitted Proposals list (Figure 4).
6. Click the View button (Figure 4). The View Submitted Proposal screen displays (Figure 5) with all the section of the submitted proposal. From this screen, you can view the proposal and print the proposal.
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. 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)

**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)

**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.
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 3**  Proposals/Supplements/File Updates/Withdrawals screen on the Submitted Documents tab. The Temp ID number is circled.

**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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**Print Menu**

Please click on the appropriate “GO” button to display the document. You need to have Adobe Acrobat viewer installed on your computer to view these PDF documents. Once you have finished viewing or printing the document -- use your browser's Back button to return to the menu.

NOTE: The PDF display may take a few minutes -- especially if you have selected the ‘Print Entire Proposal’ option. Please be patient and do not continually click the “GO” button.

- GO Cover Sheet
- GO Table Of Contents
- GO References Cited
- GO Budget (Including Justification)
- GO Facilities
- GO Mentoring Plan
- GO GOALI - Industrial PI Confirmation Letter
- GO RAISE - Program Officer Concurrence Emails
- GO Suggested Reviewers
- GO Nature of Natural or Anthropogenic Event
- GO Project Summary
- GO Project Description
- GO Bio Sketch
- GO Current and Pending
- GO Other Supplementary Docs
- GO Data Management Plan
- GO Collaborators and Other Affiliations
- GO Deviation Authorization
- GO Additional Single Copy Documents
- GO Print Entire Proposal

Figure 5 View Submitted Proposals screen. The Go button for Print Entire Proposal is circled.
Figure 6 PDF format display of the submitted proposal. The Print icon is circled.

2. Click the Print icon on the PDF screen (Figure 6). The document prints.
3. Click the back button on the browser of the PDF file to return to the View Submitted Proposals screen (Figure 5).

Revise a Submitted Proposal Budget

Revise a Submitted Proposal Budget

Print the contents of the Revise a Submitted Proposal Budget book.

In the process of making an award recommendation for a proposal, the cognizant NSF Program Officer may ask you to submit a Revised Proposal Budget for the proposed project. You can revise a Proposal Budget in this module.

If you are reducing the proposal budget by more than 10%, you must submit a Budget Impact Statement with the Revised Proposal Budget.

If you are reducing the proposal budget by less than 10%, you may still submit a Budget Impact Statement, but NSF does not require it.

Note: If an NSF Program Officer has not asked you to submit a Revised Budget but you need to correct a submitted budget, use the Proposal File Update module to correct the submitted budget.

Roles in Revising a Submitted Proposal Budget

The Principal Investigator (PI) initiates the revised submitted budget and forwards the revised budget to the Sponsored Project Office (SPO).

The AOR submits the revised budget to NSF. As a PI, you can:

- Access the Proposal Revised Budget screen
- View a budget
- Edit a submitted budget
- Prepare a Budget Impact Statement
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).

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 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).

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

   **Figure 1** Proposal Revised Budget screen. The radio button for View the Budget and the OK button are circled.

2. On the Proposal Revised Budget screen (Figure 1), click the radio button for View the Budget.

3. Click the OK button (Figure 1). The View/Print Revised Budget(s) screen displays (Figure 2).

   ![View/Print Revised Budget(s) screen](image2.png)

   **Figure 2** View/Print Revised Budget(s) screen. The View/Print button is circled.

4. Highlight the budget that you want to view from the Revision Number list (Figure 2).

5. Click the View/Print button (Figure 2). The budget you selected displays (Figure 3) in PDF format. If you need to download Adobe Reader, see Adobe Reader for FastLane.
FastLane Help

Figure 3  Budget displayed in PDF format. The Print icon is circled.

5. To print the displayed budget, click the Printer icon (Figure 3) on the Budget display screen. The budget prints.
6. Click the browser back button to return to the View/Print Revised Budget(s) screen (Figure 2).

Edit the Submitted Budget

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

   Figure 1  Proposal Revised Budget screen. The radio button for Edit the Budget and the OK button are circled.

2. Click the radio button for Edit the Budget (Figure 1).
3. Click the OK button (Figure 1). The Project Budget screen displays (Figure 2). For instructions for editing any budget year, see Budgets (Including Justification) and Enter the Budget Data Online.
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).

**Prepare a Budget Impact Statement**

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).

![Project Budget screen. The Budget Impact Statement link is circled.](image)

**Figure 1** Project Budget screen. The Budget Impact Statement link is circled.

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

![Budget Impact Statement screen.](image)

**Figure 2** Budget Impact Statement screen.

You have these options:
- Enter the Budget Impact Statement in the text box
- Upload the Budget Impact Statement

**Enter the Budget Impact Statement in the Text Box**

1. Type or copy and paste the Budget Impact Statement in the text box (Figure 2).
2. When finished, click the **Save Text** button under the text box (Figure 2). The **Project Budget** screen
FastLane Help

displays (Figure 1).

Upload the Budget Impact Statement

On the Budget Impact Statement screen (Figure 2), click the Transfer File button. The Budget Impact Statement File Upload screen displays (Figure 3). See Upload a File for instructions for uploading the Budget Impact Statement.

![Budget Impact Statement File Upload screen](image1)

Figure 3 Budget Impact Statement File Upload screen.

When you have accepted the upload, the Budget Impact Statement File Upload screen displays (Figure 4) with these new options:

- Display Current Budget Impact Statement
- Delete Current Budget Impact Statement

![Budget Impact Statement screen after you have uploaded a file](image2)

Figure 4 Budget Impact Statement screen after you have uploaded a file.

Display Current Budget Impact Statement

Click the Display Current Budget Impact Statement button (Figure 4). The previously uploaded Budget Impact Statement displays in PDF format. See Adobe Reader for FastLane, if you need to download Adobe Reader.

Delete Current Budget Impact Statement
1. Click the **Delete Current Budget Impact Statement** button (Figure 4). A screen displays with a message for you to confirm the deletion.

2. Click the **Yes** button. The **Budget Impact Statement File Upload** screen displays as in Figure 3.

#### Refresh to the Last Submitted Budget

1. Access the **Proposal Revised Budget** screen (Figure 1) (see Access the Proposal Revised Budget Screen).

   ![Proposal Revised Budget screen](image)
   
   **Figure 1** Proposal Revised Budget screen. The radio button for Refresh to Last Submitted Budget and the OK button are circled.

2. Click the radio button for Refresh to Last Submitted Budget (Figure 1).

3. Click the **OK** button (Figure 1). The **Refresh to Last Submitted Budget** screen displays (Figure 2) with a warning that refreshing to the last submitted budget results in the deletion of the Working Budget.

   ![Refresh to Last Submitted Budget](image)
   
   **Figure 2** Refresh to Last Submitted Budget screen with the message that refreshing to the last submitted budget deletes the Working (revised) Budget.

4. Click the **Refresh** button (Figure 2). A screen displays (Figure 3) with a message that the refresh was successful.
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).
Assign or Change Revised Proposal Budget PIN

This screen lets you assign a 4-digit PIN to a Revised Proposal Budget. Another FastLane user to whom you provide this “Revised Proposal Budget PIN” can use it to gain entry and perform all functions for the Revised Proposal Budget. You can also change an existing Revised Proposal Budget PIN.

Enter Revised Proposal PIN

Reenter Revised Proposal PIN

[Assign] [Go Back]

Figure 2 Assign or Change Revised Proposal Budget PIN screen.

4. In the Enter Revised Proposal PIN box (Figure 2), type the new PIN.
5. In the Reenter Revised Proposal PIN box (Figure 2), type the new PIN again.
6. Click the Assign button (Figure 2). The Revised Proposal Budget PIN screen displays (Figure 3) with the message that the PIN has been changed for the Revised Proposal Budget.

Revised Proposal Budget PIN

The PIN has been changed for the Revised Proposal Budget

[Return to Revised Budget Options Page]

Figure 3 Revised Proposal Budget PIN screen.

7. Click the Return to Revised Budget Options Page button (Figure 3). The Proposal Revised Budget displays (Figure 1).

Forward a Revised Proposal Budget to the SPO

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

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.

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).

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 (Co-PI) Senior Personnel Assigned to Proposal screen displays (Figure 2).

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).
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).

2. Click Forwarded/Submitted Revised Budgets (Figure 1). The Forwarded/Submitted Revised Budgets screen displays on the Forwarded by PI tab (Figure 2).
Figure 2 Forwarded/Submitted Revised Budgets screen on the Forwarded by PI tab screen. The Edit link is circled for a revised submitted budget.

3. Click **Edit** on the row for the proposal whose revised budget you want to edit (Figure 2). The **Project Budget** screen displays (Figure 3).

![Project Budget Screen](image)

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.

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
FastLane Help

**Figure 6**  Budget Impact Statement File Upload screen after you have uploaded a file.

**Display Current Budget Impact Statement**

1. On the **Budget Impact Statement File Upload** screen (Figure 6), click the **Display Current Budget Impact Statement** button. The uploaded Budget Impact Statement displays in PDF format. If you need to download Adobe Reader, see [Adobe Reader for FastLane](#).
2. Click the browser back button to return to the **Budget Impact Statement File Upload** screen (Figure 6).

**Delete Current Budget Impact Statement**

1. On the **Budget Impact Statement File Upload** screen (Figure 6), click the **Delete Current Budget Impact Statement** button. A screen displays with a message for you to confirm that you want to delete the file.
2. Click the **OK** button. The **Budget Impact Statement File Upload** screen displays as in Figure 5.

**Refresh to the Last Submitted Budget as an SPO/AOR**

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

![Research Administration Screen](#)

**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).
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.

4. Click the Refresh button (Figure 3). A screen displays (Figure 4) with the message that the refresh was successful.

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
FastLane Help

**Administration** screen displays (Figure 1).

![Research Administration screen](image1)

**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).

![Forwarded/Submitted Revised Budgets screen](image2)

**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.
Submit the Revised Budget screen. The Sign and Submit button is circled.

4. Click the Sign and Submit button (Figure 3). The Revised Budget Submitted screen displays (Figure 4) with the message that the Revised Proposal Budget has been submitted to NSF.

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).
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 the **Submitted by SPO** tab on the **Forwarded/Submitted Revised Budgets** screen (Figure 2). The **Forwarded/Submitted Revised Budgets** screen displays on the **Submitted by SPO** tab (Figure 3) with two options:
   - Search by date range for submitted revised budgets
   - View and print a revised budget

---

**Figure 1**  
Research Administration screen. The **Forwarded/Submitted Revised Budgets** link is circled.

**Figure 2**  
Forwarded/Submitted Revised Budgets screen. The **Submitted by SPO** tab is circled.
Search by Date Range for Submitted Revised Budgets

1. On the Forwarded/Submitted Revised Budgets screen on the Submitted by SPO tab (Figure 3), type the date ranges in the From and To boxes in mm/dd/yyyy format.
2. Click the Search button (Figure 3). The Submitted Revised Budgets in that date range display in the Submitted Budgets section of the screen.

View and Print a Revised Budget

1. On the Forwarded/Submitted Revised Budgets screen on the Submitted by SPO tab (Figure 3), click the Proposal ID number on the row for the proposal whose budget you want to view. The View/Print Revised Budget(s) screen displays (Figure 4).
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. The Print icon is circled.](image)

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.
FastLane Help

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).

   **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 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 Withdraw Type by clicking the radio button for one of the following (Figure 5):
   - Withdraw Duplicate Proposal
     Also type in the box the Proposal Number for the temporary proposal you wish NSF to retain.
   - Funding Elsewhere
• Other
8. In the Rationale for Withdrawal text box (Figure 5), type or copy and paste a detailed reason or reasons for withdrawing the proposal.
9. Click the Forward to SPO button to send the Proposal Withdrawal to the SPO (see Forward a Proposal Withdrawal to the SPO for further instructions). Or, if you do not want to forward the Withdrawal Request immediately to the SPO, you can save the Proposal Withdrawal (see Save a Proposal Withdrawal, Step 4).

If you select a non-lead or lead proposal of a collaborative proposal to withdraw, when you click the Withdraw button on the Submitted Proposals screen (Figure 4), a screen displays (Figure 6) with a message for you to confirm that you want to continue to withdraw the proposal.

![Warning screen for withdrawal of collaborative proposals.](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.

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).
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.
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.
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.

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

3. Click the Submitted Documents tab (Figure 2). The Proposals/Withdrawals/File Updates/Withdrawals screen displays on the Submitted Documents tab (Figure 3) with a list of submitted proposals.

Figure 3  Proposals/Withdrawals/File Updates/Withdrawals screen on the Submitted Documents tab. The Withdraw link is circled.

4. Click Withdraw (Figure 3) on the row for the proposal you want to withdraw. The Proposal Withdrawal screen displays (Figure 4).
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.
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)
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](image1.png)

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](image2.png)

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.*
FastLane Help

Proposal Withdrawal

Proposal Information

Proposal Number to be Withdrawn: 1708593
Title: Non lead prop

Warning: The proposal that you are attempting to withdraw is part of a collaborative proposal. Withdrawing this proposal will automatically withdraw all other proposals that belong to the collaborative. Do you wish to continue with the Withdrawal?

Yes  No

Figure 5 Screen with message for you to confirm that you want to withdraw a proposal that is part of a collaborative proposal.

1. Click the OK button (Figure 5). The Proposal Withdrawal Successful screen displays with the message that the Proposal Withdrawal has been submitted to NSF.
2. Click the Return to Submission button (Figure 4). The Proposals/Supplements/File Updates/Withdrawals screen displays on the Submitted Documents tab (Figure 1).

Delete a Saved Proposal Withdrawal as an SPO/AOR

1. Access the Proposals/Supplements/File Updates/Withdrawals screen on the Submitted Documents tab (Figure 1) (see Initiate a Proposal Withdrawal, Step 1 through Step 3).

Figure 1 Proposals/Supplements/File Updates/Withdrawals screen on the Submitted Documents tab. The Withdraw button is circled.

2. Click Withdraw on the row of the proposal that you saved a Proposal Withdrawal for (Figure 1).
**Proposal Withdrawal** screen displays (Figure 2) with the Proposal Withdrawal.

![Proposal Withdrawal](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](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
(Figure 1) (see **Initiate a Proposal Withdrawal**, Step 1 through Step 2).

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

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).

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

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).
The proposal was successfully withdrawn from FastLane, and your notification was submitted. Click on "Return to Submitted Proposals" button to return to View Submitted Proposals page.

Figure 5  Proposal Withdrawal Successful screen.

7. Click the Return to SPO Submission button (Figure 5). The Proposals/Supplements/File Updates/Withdrawals screen displays on the Withdrawals in Progress tab.

Letters of Intent Introduction

Print the contents of the Letters of Intent book.

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

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

Roles

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

The Sponsored Project Office (SPO)/ Authorized Organizational Representative (AOR) can do the following:
- Create a Letter of Intent for certain types of solicitations
- View all Letters of Intent created by PIs in their organization, including those the PI directly submitted to NSF
- Edit Letters of Intent forwarded by the PI
- Submit a Letter of Intent (AOR only)
- Return a Letter of Intent to a PI

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

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

Log in to Award Functions by role:

- Principal Investigator (PI)
- Sponsored Project Office Representative (SPO)
- Authorized Organizational 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](image)

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**

Go Back

![Figure 2](image)

Figure 2  Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Award and Reporting Functions screen.
Sponsored Project Office Representative Login to Award Functions

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

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

Figure 2  Research Administration screen. The Login section is circled.

2. In the Last Name box (Figure 2), type your last name.
3. In the **NSF ID** box (Figure 2), type your National Science Foundation Identification number (no spaces, no hyphens).
4. In the **Password** box (Figure 2), type your password.
5. Click the radio button for **Research Administration** (Figure 2).
6. Click the **Login** button (Figure 2). The **Research Administration** screen displays (Figure 3) with the following options for Awards Functions:
   - Supplements in Proposals/Supplements/File Updates/Withdrawals
   - Award Documents
   - Notifications and Requests

---

**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

(Notification 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](#))
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&lt;br&gt;• 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&lt;br&gt;• New AOR submits to NSF&lt;br&gt;• Requires AOR permissions to submit&lt;br&gt;• Requires completion of more than one action&lt;br&gt;• 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&lt;br&gt;• Requires completion of more than one action.&lt;br&gt;• For the functions of this request, see the instructions for this request.&lt;br&gt;• 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.

![Notifications and Requests screen](image1)

**Figure 1** Notifications and Requests screen on the Prepared by PI tab. The Prepare New section is circled.

2. In the Prepare New section of the **Notifications and Requests** screen on the Prepared by PI tab (Figure 1), select the award number from the **Award #** drop-down list for the award you want to prepare a notification or request for.

3. Click the Prepare New button (Figure 1). The **Prepare a New Notification or Request** screen displays (Figure 2).

![Prepare a New Notification or Request](image2)

**Figure 2** Prepare a New Notification or Request screen.

*Topic Guidance is provided through the Proposal & Award Policies & Procedures Guide (PAPPG) reference.*
FastLane Help

The screen lists the different types of Notifications and Requests you can prepare. Click on a form link below for instructions on preparing that form.

*For requests,* select from:
- Subawarding, Transferring or Contracting Out Part of an NSF Award
- Change PI/PD and Add/Change co-PI/co-PD

**Prepare a New Notification or Request as a PI**

1. Access the **Notifications and Requests** screen on the **Prepared by PI** tab (Figure 1) (see **Access Notifications and Requests as a PI**). You must be on the **Prepared by PI** tab to prepare a new notification or request.

![Figure 1 Notifications and Requests screen on the Prepared by PI tab. The Prepare New section is circled.](image)

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).
Prepare a New Notification or Request screen.

The screen lists the different types of Notifications and Requests you can prepare. Click on a form link below for instructions on preparing that form.

For requests, select from:
- Subawarding, Transferring or Contracting Out Part of an NSF Award
- Change PI/PD and Add/Change co-PI/co-PD

Access Notifications and Requests as a PI

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

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
FastLane Help

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).

   **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. The Notifications and Requests link is circled.

3. On clicking the Notifications and Request Link, the user is routed to Research.gov. Upon logging into Research.gov the user will see the below screen to prepare a New notification/Request

   **Figure 3** Research.gov Prepare new Notification/Request Screen.

4. The user will be routed to Fastlane for the following Notifications/Request:
   - Subawarding/Transferring Part of an NSF Award
   - Conflicts of Interest
FastLane Help

- 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.

![Notifications and Requests screen](image)

**Figure 4**  Notifications and Requests screen on the Prepared by PI tab.

You have these options for working on Notifications and Requests:
- **Prepare a new notification or request**
- **Search for notifications and requests**
- **View a notification or request**
- **Modify a notification or request**
- **Forward a notification or request to the SPO**
- **Delete a notification or request**
- **Check the status of a notification or request**
- **View a forwarded or submitted notification or request**
- **View the award amendment for an approved notification or request** (Click on a link above for instructions for that option.)

**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](#)).
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).

![Figure 1](notifications.png)

**Figure 1** Notifications and Requests screen on the Prepared by PI tab. The Notification/Request Type link is circled for a notification.

2. In the Work in Progress section of the Notifications and Requests screen (Figure 1), click the Notification/Request Type link on the row for the notification (or request) you want to view. The View Notification screen displays (Figure 2) with the text of the notification. (The View Request screen displays if you are viewing a request.) You have these options on the View Notification (or View Request) screen (Figure 2):
  • Modify the notification or request
  • Forward the notification or request to the SPO
  • Submit the notification to NSF
  • Delete the notification or request
  (Click on a link above for instructions for that option.)

![Figure 2](view-notification.png)

**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).

![View Request screen.](image1)

**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).

![Modify Request screen.](image2)

**Figure 2** Modify Request screen. Select the Save button.

3. Modify the request as you require. Click on a link below for the instructions for the type of notification or request you are modifying:
   - For notifications:
FastLane Help

- **Cost Sharing**
  - For requests:
    - Subawarding, Transferring, of Contracting Out Part of an NSF Award
    - PI Transfer
    - Change PI Add/Change co-PI

4. Click the **Save** button (Figure 2). The **View Request** (or **View Notification**) screen displays (Figure 3) with the changed information.

**View Notification for Award : 1431879**
**Short-Term Absence of the PI/PD (Up to Three Months)**
Required fields are preceded by an asterisk (*)

| Status: | Work in Progress |
| End Date: | 09/30/2017 |
| Award Title: | Actively Building the Drive to Achieve through Everyday Engineering Learning |
| *From Date: | 06/10/2015 |
| *To Date: | 07/29/2015 |
| *Justification for Short-Term Absence of the PI/PD: | Unexpected Travel |
| *Arrangements for Conduct of Project During PIs Absence: | Dr. Dan shall supervise research activities |

**Submit to NSF**
**Delete**
**Cancel**

Download Adobe Acrobat Reader for viewing PDF files

**Figure 3** View Request screen with the modifications displayed.

**Forward a Notification or Request to the SPO**

1. Access the **Notifications and Requests** screen on the **Prepared by PI** tab (Figure 1) (see **Access Notifications and Requests as a PI**).

**Figure 1** Notifications and Requests screen on the Prepared by PI tab. The Forward link is circled for a request.

2. In the **Work in Progress** section of the **Notifications and Requests** screen (Figure 1), click **Forward** in the row for the notification (or request) you want to forward to the SPO. The **Forward Notification** screen displays (Figure 2) with a message at the top for you to confirm that you want to forward the notification (or request) to NSF. (The **Forward Request** screen displays if you chose to forward a request.)
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.

![Forward Notification screen](image1)

**Figure 2**  Forward Notification screen. The Forward to SPO button is circled.

4. Click **Search Prepared by PI List** (Figure 3). The **Notifications and Requests** screen displays on the Prepared by PI tab.

![Forwarded screen](image2)

**Figure 3**  Forwarded screen. The Search Prepared by PI List link is circled.

**Delete a Notification or Request Prepared by the PI**

1. Access the **Notifications and Requests** screen on the Prepared by PI tab (Figure 1) (see Access Notifications and Requests as a PI).
Figure 1  Notifications and Requests screen on the Prepared by PI tab. The Delete link is circled for a request.

2. In the Work in Progress section of the Notifications and Requests screen (Figure 1), click Delete in the row for the request (or notification) you want to delete. The Delete Request screen displays (Figure 2) with a message for you to confirm that you want to delete the request. (The Delete Notification screen displays if you are deleting a notification.)

Figure 2  Delete Request screen. The message for you to confirm that you want to delete the request and the Delete button are circled.

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

Figure 3  Deleted screen. The Search Prepared by PI List link is circled.

4. Click Search Prepared by PI List (Figure 3). The Notifications and Requests screen displays on the Prepared by PI tab (Figure 1).

Check the Status of Notifications and Requests as a PI

1. Access the Notifications and Requests screen on the Prepared by PI tab (Figure 1) (see Access Notifications and Requests as a PI).

Figure 1  Notifications and Requests screen on the Prepared by PI tab. The All by Status tab is circled.

2. On the Notifications and Requests screen on the Prepared by PI tab (Figure 1), click the All by Status tab. The Notifications and Requests screen displays on the All by Status tab (Figure 2). You can search for notifications and requests by either of these criteria:
   - Award number
   - Date last modified

On this screen, you can also:
   - View a forwarded, submitted, or approved notification or request
   - View a notification or request that is in progress  (Click on a link above for instructions for that option.)
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.

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.
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.

![Notifications and Requests screen on the All by Status tab. The Status column is circled.](image)

**Figure 5**  
Notifications and Requests screen on the All by Status tab. The Status column is circled.

**View a Forwarded, Submitted, or Approved Notification or Request**

1. On the **Notifications and Requests** screen on the **All by Status** tab (Figure 6), click the **Notification/Request Type** link on the row of the notification or request you want to view. The **View Notification** (or **View Request**) screen displays (Figure 7) with the contents of the notification or request. You can no longer work on a notification or request that has been forwarded, submitted, or approved.
Figure 6  Notifications and Requests screen on the All by Status tab. The Notification/Request Type link is circled for a notification.

Figure 7  View Notification screen.

2. Click the Cancel button (Figure 7). The Notifications and Requests screen displays on the All by Status tab (Figure 6).

View a Notification or Request in Progress

On the Notifications and Requests screen on the All by Status tab (Figure 8), click the Notification/Request Type link on the row of the in-progress notification or request you want to view. The View Request (or View Notification) screen displays (Figure 9) with the contents of the notification or request. You have these options on this screen:

- Modify the notification or request
- Forward the notification or request to the SPO
- Delete the notification or request

(Click on a link above for instructions for that option.)
Figure 8 Notifications and Requests screen on the All by Status tab. The Notification/Request Type link is circled for a request.

Figure 9 View Request screen for an in-progress request.

View the Award Amendment for an Approved Notification or Request as a PI

1. Access the Notifications and Requests screen on the All by Status tab and search for notifications and requests as you require (see Check the Status of Notifications and Requests). The Notifications and Requests screen displays (Figure 1) with all notifications and requests.
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).

![Research Administration](image)

**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 2
Notifications and Requests screen on the Prepared by SPO tab. The **Prepare New** section is circled.

### 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**
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](image1.png)

   **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](image2.png)

   **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).

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).
2. In the Work in Progress section of the Notifications and Requests screen (Figure 1), click the Notification/Request Type link on the row for the notification (or request) you want to view. The View Notification screen displays (Figure 2) with the text of the notification. (The View Request screen displays if you are viewing a request.) You have these options on the View Notification (or View Request) screen:

- Modify the notification (or request)
- Submit the notification (or request) (AOR only)
- Delete the notification (or request)

(Click on a link above for instructions for that option.)

---

Figure 1  Notifications and Requests screen on the Prepared by SPO tab.

Figure 2  View Notification screen.

Modify a Notification or Request Prepared by the SPO

1. Access the View Notification (or View Request) screen (Figure 1) (see View a Notification or Request Prepared by the SPO).
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
     - PI Transfer
   - For requests, select from:
     - Subawarding, Transferring or Contracting Out Part of an Award
FastLane Help

- **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)**

**Required Fields are preceded by an asterisk (*)**

- **Status:** Work in Progress
- **End Date:** 09/30/2017
- **Award Title:** Actively Building the Drive to Achieve through Everyday Engineering Learning
- **From Date:** 06/10/2015
- **To Date:** 07/29/2015
- **Justification for Short-Term Absence of the PI/PD:** Unexpected Travel
- **Arrangements for Conduct of Project During PIs Absence:** Dr. Dan shall supervise research activities

**Submit to NSF**

**Modify**

**Delete**

**Cancel**

Figure 3 View Notification screen with the new information.

**Submit a Notification or Request Prepared by the SPO (AOR only)**

1. Access the **Notifications and Requests** screen on the **Prepared by SPO** tab (Figure 1) (see **Work on Notifications and Requests Prepared by the SPO**).

![Notifications and Requests screen on the Prepared by SPO tab. The Submit link is circled for a request.]

2. In the **Work in Progress** section of the **Notifications and Requests** screen (Figure 1), click **Submit** in the row for the request (or notification) you want to submit to NSF. The **Submit Request** screen displays (Figure 2) with a message at the top for you to confirm that you want to submit the request (or notification) to NSF. (The **Submit Notification** screen displays if you are submitting a notification.)
FastLane Help

Submit Notification for Award : 1431879
Short-Term Absence of the PI/PD (Up to Three Months)
Required fields are preceded by an asterisk (*).

ARE YOU SURE?
Clicking "Submit to NSF" will submit this Notification to NSF. You cannot modify it once submitted to NSF.
Click "Cancel" to return to previous screen.

<table>
<thead>
<tr>
<th>Status:</th>
<th>Work in Progress</th>
</tr>
</thead>
<tbody>
<tr>
<td>End Date:</td>
<td>09/30/2017</td>
</tr>
<tr>
<td>Award Title:</td>
<td>Actively Building the Drive to Achieve through Everyday Engineering Learning</td>
</tr>
<tr>
<td>*From Date:</td>
<td>06/18/2015</td>
</tr>
<tr>
<td>*To Date:</td>
<td>07/29/2015</td>
</tr>
</tbody>
</table>

*Justification for Short-Term Absence of the PI/PD: Unexpected Travel
*Arrangements for Conduct of Project During PI’s Absence: Dr. Qian shall supervise research activities

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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.

![Submitted Screen](image)

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.
Figure 3   Deleted screen. The Search Prepared by SPO List link is circled.

4. Click **Search Prepared by SPO List** (Figure 3). The **Notifications and Requests** screen displays on the Prepared by SPO tab (Figure 1).

**Work on Notifications and Requests Forwarded by PI**

**Work on Notifications and Requests Forwarded by the PI**

Access the **Notifications and Requests** screen on the Forwarded by PI tab (Figure 1) (see Access Notifications and Requests as an SPO/AOR). The screen displays with a listing of the notifications and requests that have been forwarded by PIs but have not been submitted to NSF.

Figure 1   Notifications and Requests screen on the Forwarded by PI tab.

On this tab you work on notifications and requests that have been forwarded by PIs. You have these options:

- **Search for notifications and requests**
- **View the notification or request**
Modify the notification or modify the request
Submit the notification or request
Return the notification or request to the PI
Delete the notification or request

(Click on a link above for instructions for that option.)

Click on a link below for the instructions for modifying that notification or request form:
For notifications, select from:
• Annual and Final Cost Sharing Notification by Recipient

For requests, select from:
• Subawarding, Transferring or Contracting Out Part of an Award
• PI Transfer
• Change PI Add/Change PI/Co-PI

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.

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.)
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).
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).

4. Find the notification or request you want to work on. You have these options:
   - View the notification or request
   - Modify the notification or modify the request
   - Submit the notification or request (AOR only)
   - Delete the notification or request
   - Return the notification or request to the PI
     (Click on a link above for instructions for that option.)

Submit to NSF a Notification or Request Forwarded by the PI

1. Access the Notifications and Requests screen on the Forwarded by PI tab (Figure 1) (see Access Notifications and Requests as an SPO/AOR). The screen displays with a listing of the notifications and requests that have been forwarded by PIs but have not been submitted to NSF.
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 1  Notifications and Requests screen on the Forwarded by PI tab.

3. Click the Submit to NSF button (Figure 2). The Submitted screen displays (Figure 3) with a message that the request (or notification) has been submitted to NSF.
Figure 3    Submitted screen.

4. Click Search Forwarded by PI List (Figure 3). The Notifications and Requests screen displays on the Forwarded by PI tab. Return a Notification or Request to the PI

1. Access the Notifications and Requests screen on the Forwarded by PI tab (Figure 1) (see Access Notifications and Requests as an SPO/AOR). The screen displays with a listing of the notifications and requests that have been forwarded by PIs but have not been submitted to NSF.

Figure 1    Notifications and Requests screen on the Forwarded by PI tab. The Notification/Request Type link is circled for a request.

2. In the Work in Progress section (Figure 1), click the Notification/Request Type link on the row for the
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request (or notification) you want to return. The View Request screen displays (Figure 2) with the request you want to return to the PI. (The View Notification screen displays if you are returning a notification.)

Figure 2 View Request screen. The Return to PI button is circled.

3. Click the Return to PI button (Figure 2). The Return Request screen displays (Figure 3). (The Return Notification screen displays if you are returning a notification).

Figure 3 Return Request screen. The Return to PI button is circled.

4. In the Reasons for Returning to PI box (Figure 3), type or copy and paste the reasons you are returning the request (or notification) to the PI. Once you return the request (or notification) to the PI, it is no longer available for you to work on.

5. Click the Return to PI button (Figure 3). The Returned screen displays (Figure 4) with a message that the request (or notification) has been returned to the PI.
Figure 4  Returned screen. The Search Forwarded by PI List link is circled.

6. Click Search Forwarded by PI List (Figure 4). The Notifications and Requests screen displays on the Forwarded by PI tab (Figure 1).

Delete a Notification or Request Forwarded by the PI

1. Access the Notifications and Requests screen on the Forwarded by PI tab (Figure 1) (see Access Notifications and Requests as an SPO/AOR). The screen displays with a listing of the notifications and requests that have been forwarded by PIs but have not been submitted to NSF.

Figure 1  Notifications and Requests screen on the Forwarded by PI tab. The Delete link is circled for a request.

2. In the Work in Progress section of the Notifications and Requests screen (Figure 1), click Delete in the row for the request (or notification) you want to delete. The Delete Request screen displays (Figure 2) with a message for you to confirm that you want to delete the request. (The Delete Notification screen displays if you are deleting a notification.)
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**Delete Notification for Award: 1431879**

**Short-Term Absence of the PI/PD (Up to Three Months)**

Required fields are preceded by an asterisk (*).

**ARE YOU SURE?**

Clicking "Delete" will remove this Request from the FastLane database.
Click "Cancel" to return to previous screen.

- **Status:** Work in Progress
- **End Date:** 09/30/2017
- **Award Title:** Actively Building the Drive to Achieve through Everyday Engineering Learning
- **From Date:** 08/10/2015
- **To Date:** 07/29/2015
- **Justification for Short-Term Absence of the PI/PD:** Unexpected Travel
- **Arrangements for Conduct of Project During PI's Absence:** Dr. Dan shall supervise research activities

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**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.

![Deleted screen](image1)

**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**).
FastLane Help

Figure 1  Notifications and Requests screen on the Forwarded by PI tab. TheSubmitted to NSF tab is circled.

2. On the Notifications and Requests screen on the Forwarded by PI tab (Figure 1), click the Submitted to NSF tab. The Notifications and Requests screen displays on the Submitted to NSF tab (Figure 2). You can search for notifications and requests by any of these criteria:
   • Award number
   • PI Last name and/or PI Division/Dept.
   • Date last modified
   On this screen, you can also:
   • View a submitted notification or request
   • View the award amendment to an approved notification or request (Click on a link above for instructions for that option.)

Figure 2  Notifications and Requests screen on the Submitted to NSF tab.

Search by Award Number for Submitted Notifications and Requests
1. In the **Award #** box of the **Notifications and Requests** screen on the **Submitted to NSF** tab (Figure 3), type the award number for the award whose notifications and requests you want to find.

![Figure 3](image_url) **Notifications and Requests screen on the Submitted to NSF tab. The Award # box and the Search button are circled.**

2. Click the **Search** button (Figure 3). The **Notifications and Requests** screen displays on the **Submitted to NSF** tab (Figure 4). The submitted notifications and requests for that award are listed in the **Submitted to NSF** section with their status.

![Figure 4](image_url) **Notifications and Requests screen on the Submitted to NSF tab. The Status column is circled.**

**Search by the PI and/or PI Division/Dept.**

On the **Notifications and Requests** screen on the **Submitted to NSF** tab (Figure 5), you can search for submitted notifications and requests by either one or both of the following criteria:

- PI Last Name
- PI Division/Dept.

1. In the **PI Last Name** box (Figure 5), type the last name of the PI whose submitted requests and notifications you want to check.
2. In the **PI Division/Dept.** box (Figure 5), type the name of the PI’s division or department.

3. Click the **Search** button (Figure 5). The **Notifications and Requests** screen displays on the **Submitted to NSF** tab (Figure 6) with the submitted notifications and requests that meet your search criteria.

**Figure 5**   Notifications and Requests screen on the Submitted to NSF tab. The section for PI Last Name and PI Division/Dept. are circled.

**Search by the Date the Notification or Request Was Last Modified**

1. On the **Notifications and Requests** screen on the **Submitted to NSF** tab (Figure 7), in the **From** box, type the start date for the date range you want to search for.

**Figure 7**   Notifications and Requests screen on the Submitted to NSF tab. The section for a search by the date last modified is circled.
2. In the To box (Figure 7), type the end date for the date range you want to search for.
3. Click the Search button (Figure 7). The Notifications and Requests screen displays on the Submitted to NSF tab (Figure 8). The notifications and requests in that date range are listed in the Submitted to NSF section.

![Figure 8](image1.png)

Notifications and Requests screen on the Submitted to NSF tab. The Status column is circled.

**View a Submitted Notification or Request**

1. On the Notifications and Requests screen on the Submitted to NSF tab (Figure 9), click the Notification/Request Type link on the row of the notification or request you want to view. The View Notification (or View Request) screen displays (Figure 10) with the contents of the submitted notification or request.

![Figure 9](image2.png)

Notifications and Requests screen on the Submitted to NSF tab. The Notification/Request Type link is circled for a notification.
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Figure 10  View Notification screen.

2. Click the Cancel button to return to the Notifications and Requests screen on the Submitted to NSF tab (Figure 9).

View the Award Amendment for an Approved Notification or Request as an SPO/AOR

1. Access the Notifications and Requests screen on the Submitted to NSF tab and search for notifications and requests as you require (see Check the Status of Submitted Notifications and Requests). The Notifications and Requests screen displays (Figure 1) with the notifications and requests you searched for.

2. Find a notification or request that has the status of “Approved by Grants Official” (Figure 1).

3. Click the number in the Amd column on the row for the approved notification or request (Figure 1). The National Science Foundation screen displays (Figure 2) with the text of the amendment.
Figure 2 National Science Foundation screen. The Return to Search Results link is circled.

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

Notifications

Notifications

Print the contents of the Notifications book.

You can prepare the following types of notifications:

- Annual Cost Share Notification by Recipient (SPO/AOR only)

After you have initiated a notification, you have these options for working:

- Modify a notification
- Forward a notification to the SPO
- Submit a notification to NSF (AOR only)
- Delete a notification

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
FastLane Help

1. Access the **Prepare a New Notification or Request** screen (Figure 1) (see **Prepare a New Notification or Request** as an SPO/AOR).

   ![Prepare a New Notification or Request screen](image1.png)

   **Figure 1** Prepare a New Notification or Request screen. Select the radio button for Cost Sharing and then the Prepare button.

2. On the **Prepare a New Notification or Request** screen (Figure 1), click the radio button for Cost Sharing.
3. Click the **Prepare** button (Figure 1). The **Notification for Award Cost Sharing** screen displays (Figure 2).

   ![Notification for Award Cost Sharing](image2.png)

   **Figure 2** Notification for Cost Sharing.

4. In the **Start Date** box (Figure 2), type the start date for the reporting period (in mm/dd/yyyy format).
5. In the **End Date** box (Figure 2), type the end date for the reporting period (in mm/dd/yyyy format).
6. In the **Cost Sharing Amount for the Reporting Period** box (Figure 2), type the amount of cost sharing for this reporting period (no dollar sign, no commas).
7. In the **Cumulative Cost Sharing Amount Reported to Date** (Figure 2), type the cumulative amount of cost.
sharing for the award, including for this reporting period (no dollar sign, no commas).

8. **For Cost Sharing Notification Type** (Figure 2), click the radio button for either of the following:
   - Annual Cost Sharing Notification
   - Final Cost Sharing Notification

9. In the **Explanation** box (Figure 2), type an explanation for the.

10. Click the **Save** button (Figure 2). The **View Notification for Cost Sharing** screen displays (Figure 3). You have these options:
   - **Modify the notification**
   - **Submit the notification to NSF (AOR only)**
   - **Delete the notification**

---

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

- If you are a PI, see [View a Notification Prepared by the PI](#).
- If you are an SPO, see [View a Notification Prepared by the SPO](#) or [View a Notification Forwarded by the PI](#).

**Figure 1**  **View Notification screen. The Modify button is circled.**
2. 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](Image)

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.
1. 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.

2. Click Search Prepared by SPO List (Figure 3). The Notifications and Requests screen displays on the Prepared by SPO tab. (If you are a PI, the Search Prepared by PI List link displays on the Submitted screen. When you click on the link, the Notifications and Requests screen displays on the Prepared by PI tab.)

**Delete a Notification**

1. Access the View Notifications Screen. See one of the following:
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- 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).
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.

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**

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**Figure 3**  Subawarding, Transferring or Contracting Out a Part of an NSF Award Form Preparation screen.

The **Subawarding, Transferring or Contracting Out a Part of an NSF Award Request Form Preparation** screen (Figure 3) also gives you these options:

- **Forward a subaward request to the SPO** (for PI only)
- **Delete a subaward request** (for both PI and SPO)
- **Submit a subaward request** (for AOR only)

(Click on a link above for instructions for that option.)

To modify a Subawarding, Transferring or Contracting Out a Part of an NSF Award Request, on the **Subawarding, Transferring or Contracting Out a Part of an NSF Award Form Preparation** screen (Figure 3), click the **Go** button for any form and modify the form as you require.

---

**Forward a Subawarding, Transferring or Contracting Out a Part of an NSF Award Request to the SPO**

Only a PI can forward a Subawarding, Transferring or Contracting Out a Part of an NSF Award Request to the SPO.

1. Access the **Subawarding, Transferring or Contracting Out a Part of an NSF Award Form Preparation** screen (Figure 1) (see Prepare an Subawarding, Transferring or Contracting Out a Part of an NSF Award Request).
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.

Figure 1    Subawarding, Transferring or Contracting Out a Part of an NSF Award Form Preparation screen. The Forward to SPO button is circled.

Figure 2    Subaward Request Was Forwarded screen.
2. On the Subawarding, Transferring or Contracting Out a Part of an NSF Award Form Preparation screen (Figure 1), click the Sign and Submit button. The Subaward Request was Submitted and Signed screen displays (Figure 2) with the message that the Subaward Request was submitted and signed.

Figure 1 Subawarding, Transferring or Contracting Out a Part of an NSF Award Form Preparation screen. The Sign and Submit button is circled.

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).

![Image](https://example.com/image1.png)

**Figure 1** Subawarding, Transferring or Contracting Out a Part of an NSF Award Form Preparation screen. The Delete This Request button is circled.

2. On the **Subawarding, Transferring or Contracting Out a Part of an NSF Award** Form Preparation screen (Figure 1), click the **Delete This Request** button. The **Subaward Request Was Deleted** screen displays (Figure 2) with the message that FastLane has deleted the request.

![Image](https://example.com/image2.png)

**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)
FastLane Help

- Budgets (Including Justification) (required)
- Add/Delete Senior Personnel
- Justification for Recipient Selection (required)
- Supplementary Documents

**Forms for Subawarding, Transferring or Contracting Out a Part of an NSF Award**

The Subawarding, Transferring or Contracting Out a Part of an NSF Award has the following forms for completion:

- Description of Work to be Performed (required)
- Budgets (Including Justification) (required)
- Add/Delete Senior Personnel
- Justification for Recipient Selection (required)
- Supplementary Documents

**Description of Work to be Performed for Subawarding, Transferring or Contracting Out a Part of an NSF Award**

1. Prepare a word-processing document with the Description of Work to be Performed. See Acceptable Formats for FastLane for the many formats FastLane accepts for uploading.
2. Access the Subawarding, Transferring or Contracting Out a Part of an NSF Award Form Preparation screen (Figure 1) (see Prepare an Subawarding, Transferring or Contracting Out a Part of an NSF Award Request).

![Figure 1](subawarding.png)

**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).
4. See Upload a File for instructions on how to upload the description. When you have accepted the upload, the Description of Work To Be Performed File Upload screen (Figure 3) displays with these options:
   - Display Current Description of Work to Be Performed
   - Delete Current Description of Work to Be Performed
   - Upload a New Description of Work to Be Performed

![Figure 3 Description of Work to Be Performed File Upload screen with options for viewing or deleting the Description of Work to be Performed.](image)

Display Current Description of Work to Be Performed

Click the Display Current Description of Work to Be Performed button (Figure 3). The file will display in PDF format. See Adobe Reader for FastLane, if you need to download Adobe Reader.

Delete Current Description of Work to Be Performed

1. Click the Delete Current Description of Work to Be Performed button (Figure 3). A screen displays with a message for you to confirm that you want to delete the file.
2. Click the OK button. The document is deleted.

Upload a New Description of Work to Be Performed
Follow the directions in **Upload a File**. Uploading a new Description of Work to Be Performed automatically replaces the file that was previously uploaded.

---

**Budgets (Including Justification) for Subawarding, Transferring or Contracting Out a Part of an NSF Award**

1. Access the **Subawarding, Transferring or Contracting Out a Part of an NSF Award Request Form Preparation** screen (Figure 1) (see Prepare a Subawarding, Transferring or Contracting Out a Part of an NSF Award Request).

   ![Figure 1 - Subawarding, Transferring or Contracting Out a Part of an NSF Award Form Preparation screen. The Go button for Budgets (Including Justification) is circled.](image)

   **Figure 1** Subawarding, Transferring or Contracting Out a Part of an NSF Award Request Preparation screen. The Go button for Budgets (Including Justification) is circled.

2. On the **Subawarding, Transferring or Contracting Out a Part of an NSF Award Request Preparation** screen (Figure 1), click the **Go** button for Budgets (Including Justification). The **Project Budget** screen displays (Figure 2).

   ![Figure 2 - Project Budget screen.](image)

   **Figure 2** Project Budget screen.

   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
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 Request).

![Figure 1](image1.png)

**Figure 1** Subawarding, Transferring or Contracting Out a Part of an NSF Award Form Preparation screen. The Go button for Justification for Subrecipient Selection is circled.

3. On the Subawarding, Transferring or Contracting Out a Part of an NSF Award Form Preparation screen (Figure 1), click the Go button for Justification for Subrecipient Selection. The Justification for Subrecipient Selection File Upload screen displays (Figure 2).

![Figure 2](image2.png)

**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
FastLane Help

**Justification for Subrecipient Selection File Upload** screen (Figure 3) displays with these options:

- Display Current Justification for Subrecipient Selection
- Delete Current Justification for Subrecipient Selection
- Upload a New Justification for Subrecipient Selection

![Justification for SubAwardee selection](Image)

**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.

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).

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 Un obligated Funds** box (Figure 2), type or copy and paste your organization’s plan for expending the funds for the project up to the revised expiration date.

10. In the **Explanation for Late Request** box (Figure 2) type or copy and paste your explanation. Click the **Save** button (Figure 2). The **View Request for NSF-Approved No-Cost Extension** screen displays (Figure 3). You have these options:

    - **Modify the request**
    - **Forward the request to the SPO** or **Submit the request to NSF**
    - **Delete the request**

    (Click on a link above for instructions for that option.)
Figure 3  View Request for NSF-Approved No-Cost Extension screen.

PI/PD or co-PI/co-PD Transfer Request  What Is
the PI Transfer Request?

Consistent with the Proposal & Award Policies & Procedures Guide (PAPPG) 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 Officer. 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.

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:

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- The AOR of the new organization then indicates agreement with the PI Transfer Request, by submitting the request to NSF.

The main roles and responsibilities for the PI Transfer Request break down like this:

- **The PI may:**
  - Prepare a PI Transfer Request
  - Forward the PI Transfer Request to the SPO of the original organization
  - Edit the organization’s budget in collaboration with the new SPO

- **The SPO/AOR of the original organization may:**
  - Prepare a PI Transfer Request
  - Edit a PI Transfer Request
  - Return a PI Transfer Request to the PI
  - Submit a PI Transfer Request to the SPO of the new organization (AOR only)

- **The SPO/AOR of the new organization may:**
  - Edit the request as needed and edit the budget in collaboration with the PI
  - Return the PI Transfer Request to the SPO of the original organization
  - Submit the request to NSF (AOR only)

Each PI Transfer Request **must** contain the following:

- **Grant Transfer Request**
  A form that includes the total estimated disbursements to date and any anticipated costs yet to be incurred against the original grant

- **Progress Summary**
  A brief description of the progress to date on the project in the original organization

- **Description of Work to be Accomplished**
  A description of the work that will be carried out on the project in the new organization

- **Budget (Including Justification)**
  A budget showing the allocation of the remaining award funds for use in the new organization and a justification of how the funds will be expended

These forms are completed through the PI Transfer Request application. To begin working on a PI Transfer Request:

- **If you are a PI,** see [Prepare a PI Transfer Request as a PI](#).
- **If you are the original SPO,** see [Prepare a PI Transfer Request as an SPO/AOR](#) or [Work on a PI Request Forwarded by the PI](#).
- **If you are the new SPO,** see [Work on a PI Transfer Forwarded by the Original AOR](#).

**PI Functions**
Prepare a PI Transfer Request as a PI

1. Access the Prepare a New Notification or Request screen (Figure 1) (see Prepare a New Notification or Request as a PI).

![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).
4. In the Request Details section of the Grant Transfer Request screen (Figure 3), click the Select New Awardee Organization button to enter the name of the organization that you are transferring the grant to. The
Institution Search screen displays (Figure 4) for you to search for the name of the new awardee organization in the list of NSF registered organizations.

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

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.
### Request Details

**Start Date of Transfer (mm/dd/yyyy)**

1/20/2016

**Transfer Organization**

- MIT Lincoln Laboratory
- Lincoln Lab
- 244 Wood Street
- Lexington, MA 02420-9106

**New Awardee Organization**

- MIT Lincoln Laboratory
- AL
- Add/Change New Primary Place of Performance

**US-America/New York (GMT-5:00)**

**Select New Awardee Organization**

**Original Grant Amount**

$150,000.00

**Total Disbursements and Unpaid Obligations (at start date of transfer)**

$157,315

**Unobligated Balance**

$234,925.00

**Amount to be Transferred**

$234,925.00

This is the single opportunity to provide the correct dollar amount to be transferred, please make sure it is reconciled prior to final submission of this request to NSF. Upon transfer of the grant to the new organization, any monetary discrepancies must be resolved between the original and the new grantees. NSF will not intervene in any disputes between the two organizations regarding the transferred amount.

The proposal requested for transfer includes any of the items listed below:

- **Human subjects:** No
- **Vertebrate animals:** No
- **Disclosure of lobbying activities:** No

**FY2018:** $125,000.00

**Outstanding Increments:**

*Save & Continue* *Go Back*

---

**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.

![Figure 7 FastLane Contacts screen.](image)

FastLane Contact(s) for: Purdue University

<table>
<thead>
<tr>
<th>FastLane Contact Name</th>
<th>Email</th>
<th>Phone Number</th>
<th>Fax Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Megan Spain</td>
<td><a href="mailto:ref2@test.com">ref2@test.com</a></td>
<td>2223334444</td>
<td>2223335000</td>
</tr>
<tr>
<td>ReathaLWalls</td>
<td><a href="mailto:ref2@test.com">ref2@test.com</a></td>
<td>2223334444</td>
<td>2223335000</td>
</tr>
<tr>
<td>LuanneMcFlynn</td>
<td><a href="mailto:ref2@test.com">ref2@test.com</a></td>
<td>2223334444</td>
<td>2223335000</td>
</tr>
<tr>
<td>AnnTempleman</td>
<td><a href="mailto:ref2@test.com">ref2@test.com</a></td>
<td>2223334444</td>
<td>2223335000</td>
</tr>
<tr>
<td>MikeRLudwig</td>
<td><a href="mailto:ref2@test.com">ref2@test.com</a></td>
<td>2223334444</td>
<td>2223335000</td>
</tr>
<tr>
<td>ChristyHaddock</td>
<td><a href="mailto:ref2@test.com">ref2@test.com</a></td>
<td>2223334444</td>
<td>2223335000</td>
</tr>
</tbody>
</table>

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.](image)
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.
Request Details

Start Date of Transfer (mm/dd/yyyy) 1/20/2016

Transfer Organization

[New Awarded Organization]

MIT Lincoln Laboratory
Lincoln Lab
244 Wood Street
Lexington, MA 02420-9106

[View contact information]

US-Amercia/New_York(GMT-5:00)

Select New Awarded Organization

Original Grant Amount $250,000.00
(including amendments actually awarded, if any)

Total Disbursements and Unpaid Obligations (at start date of transfer) 10571

[Note: Please enter the amount as whole number only, do not use special characters, such as dollar sign or comma.]

Unobligated Balance $234,929.00
(Amount to be Transferred)

This is the single opportunity to provide the correct dollar amount to be transferred, please make sure it is reconciled prior to final submission of this request to NSF. Upon transfer of the grant to the new organization, any monetary discrepancies must be resolved between the original and the new grantee. NSF will not intervene in any disputes between the two organizations regarding the transferred amount.

The proposal requested for transfer includes any of the items listed below:

Human subjects: No
Vertebrate animals: No
Disclosure of lobbying activities: No

FY2018: $250,000.00 Outstanding Incrments:

Save & Continue  Go Back

Send Comments to NSF
Awardee Organization and the New Primary Place of Performance displayed.

15. In the **Total Estimated Disbursements and Unpaid Obligations at the Start Date Of Transfer** box on the **Grant Transfer Request** screen (Figure 11), type the total estimate of disbursements and unpaid obligations for the grant (no dollar sign, no commas).

![Figure 11](lower portion of the Grant Transfer Request screen. The Save and Continue button is circled.)

16. Click the **Calculate** button (Figure 11). FastLane calculates and displays the amount of the estimated unobligated balance for the award. This is the amount of funds that will be transferred to the new awardee organization.

17. Select any of the following that apply:
   - Human subjects involvement
   - Vertebrate animals involvement
   - Lobbying activities (see "Disclosing Lobbying Activities")

18. Click the **Save and Continue** button (Figure 11). The **Click on a Link to Work** screen displays (Figure 12). On this screen, you have these options:
   - Update contact information
   - Edit transfer request forms
   - Check for completeness
   - Forward the PI Transfer Request to the original SPO
   - Cancel (delete) the PI Transfer Request
19. Click Edit Transfer Request Forms to complete the forms required for a PI Transfer. See Edit Transfer Request Forms Introduction for instructions.

                Prepare a PI Transfer Request as a PI

1. Access the Prepare a New Notification or Request screen (Figure 1) (see Prepare a New Notification or Request as a PI).

                Figure 1                Prepare a New Notification or Request screen.

2. On the Prepare a New Notification or Request screen (Figure 1), click the radio button for PI Transfer in the Grantee Request Types list.

3. Click the Prepare button (Figure 1). The Grant Transfer Request screen displays (Figure 2).
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.

**Figure 2** Grant Transfer Request screen.
that you are transferring the grant to. The **Institution Search** screen displays (Figure 4) for you to search for the name of the new awardee organization in the list of NSF registered organizations.

Figure 3  **Request Details section of the Grant Transfer Request screen. The Select New Awardee Organization button is circled.**

![Institution Search](image)

**Institution Search**

Please type as much of the Institution name as you know (at least 3 letters).

- Begins With
- Ends With
- Contains

Locate

Figure 4  **Institution Search screen.**

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

Figure 5  **Institutions Located screen. The Select button is circled.**

![Institutions Located](image)

8. Highlight the name of the new awardee organizations (Figure 5).
9. Click the **Select** button (Figure 5). The **Grant Transfer Request** screen displays (Figure 6) with the name of the new awardee organization in the **Request Details** section.
GRANT TRANSFER REQUEST

Current status of the request: PI working on the request

Award Information

Original Grant Number: DM-160327
Title: Local Inverse Problem

Original Grants Name: Purdue University
and Address: Young Hall
125 S Grant Street
West Lafayette, IN 47907-2114
US

TimeZone: US-America/New_York (GMT-5:00)

Request Details

Start Date of Transfer (mm/dd/yyyy): 10/30/2016
Transfer Organization:

[New Awardee Organization]

MIT Lincoln Laboratory
Lincoln Lab
244 Wood Street
Lexington, MA 02470-9101
(See contact information)
US-America/New_York (GMT-5:00)
Select New Awardee Organization

Original Grant Amount (including amendments actually awarded, if any): $50,000.00

Total Disbursements and Unpaid Obligations (at start date of transfer): $5071
[Note: Please enter the amount as whole number only, do not use special characters, such as dollar sign or comma.]

Unobligated Balance (Amount to be transferred): $34,929.00
Calculate

This is the single opportunity to provide the correct dollar amount to be transferred; please make sure it is reconciled prior to final submission of this request to NSF. Upon transfer of the grant to the new organization, any monetary discrepancies must be resolved between the original and the new grantees. NSF will not intervene in any disputes between the two organizations regarding the transferred amount.

The proposal requested for transfer includes any of the items listed below:

- Human subjects: No
- Vertebrate animals: No
- Disclosure of lobbying activities: No

FY2018: $125,000.00 Outstanding Increments:

Send Comments to NSF
10. 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.

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.
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
FastLane Help

**Grant Transfer Request** screen (Figure 11), type the total estimate of disbursements and unpaid obligations for the grant (no dollar sign, no commas).

![Grant Transfer Request Screen](image)

**Figure 11** Lower portion of the Grant Transfer Request screen. The Save and Continue button is circled.

16. Click the **Calculate** button (Figure 11). FastLane calculates and displays the amount of the estimated unobligated balance for the award. This is the amount of funds that will be transferred to the new awardee organization.

17. Select any of the following that apply:
   - Human subjects involvement
   - Vertebrate animals involvement
   - Lobbying activities (see "Disclosing Lobbying Activities")

18. Click the **Save and Continue** button (Figure 11). The **Click on a Link to Work** screen displays (Figure 12). On this screen, you have these options:
   - **Update contact information**
   - **Edit transfer request forms**
   - **Check for completeness**
   - **Forward the PI Transfer Request to the original SPO**
   - **Cancel (delete) the PI Transfer Request**

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

**Figure 12** Click on a Link to Work screen.
19. Click **Edit Transfer Request Forms** to complete the forms required for a PI Transfer. See **Edit Transfer Request Forms Introduction** for instructions.

**Update Contact Information**

1. Access the **Click on a Link to Work** screen (Figure 1) (see **Prepare a PI/PD or co-PI/co- PD Transfer Request as a PI**).

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

**Figure 1**  
Click on a Link to Work screen. The Update Contact Information link is circled.

2. On the **Click on a Link to Work** screen (Figure 1), click **Update Contact Information**. The **Principal Investigator (PI) Information** screen displays (Figure 2).

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

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

5. Select the search type option (Figure 4):
   • Begins with returns all organizations whose name begins with the text entered.
   • Ends with returns all organizations whose name ends with the text entered.
   • Contains returns all organizations whose name contains the text entered.

6. Enter the string (at least three characters) to search for (Figure 4).
7. Click the Locate button (Figure 4). The Institution Search screen displays (Figure 5).

Figure 5  Institution Search screen. The Select button is circled.

8. Highlight the organization in the Institutions Located list (Figure 5).
9. Click the Select button (Figure 5). The Edit Principal Investigator’s (PI) Information screen displays (Figure 3) with the name of the selected organization and the Institution Identification Number displaying in the appropriate boxes.
10. On the Edit Principal Investigator’s (PI) Information screen (Figure 6), when you are finished changing the PI information, click the Save Changes button. A screen displays (Figure 7) with confirmation that the PI Information has been saved.
11. Click the OK button (Figure 7). The Principal Investigator (PI) Information screen displays (Figure 8).

**Figure 6** Lower portion of the Edit Principal Investigator’s (PI) Information screen. The Save Changes button is circled.

**Figure 7** Screen with the message that the changed PI information has been saved.

**Figure 8** Principal Investigator (PI) Information screen.

---

**Check for Completeness of a PI Transfer Request as a PI**

1. Access the Click on a Link to Work screen (Figure 1) (see Prepare a PI Transfer Request as a PI).
2. On the Click on a Link to Work screen (Figure 1), click Check for Completeness. The Completeness Checking of Request for Grant Transfer screen displays.

*If the PI/PD or co-PI/co-PD Transfer Request is incomplete*, the Completeness Checking of Request for Grant Transfer screen displays as in Figure 2, with a message on which forms still require completion before submission to NSF.

*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.
FastLane Help

Figure 2  Forward the Grant Transfer Request to Original SPO screen with the message for you to confirm that you want to forward the request to the original SPO. The Forward button is circled.

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

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

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](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 original SPO.

Delete a PI Transfer Request as a PI

1. Access the Click on a Link to Work screen (Figure 1) (see Prepare a PI Transfer Request as a PI).
Figure 1  Click on a Link to Work screen. The Cancel Transfer Request link is circled.

2. On the Click on a Link to Work screen (Figure 1), click Cancel Transfer Request. The Delete the Grant Transfer Request screen displays (Figure 2) with a message for you to confirm that you want to delete the PI/PD or co-PI/co-PD Transfer Request.

![Delete the Grant Transfer Request screen. The Delete button is circled.]

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. The View Transfer Request Forms button is circled.]

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/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).

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.
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.

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

**Click on a Link to Work**
- Update Contact Information
- View Transfer Request Forms
- Cancel Transfer Request
- **Edit 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).

<table>
<thead>
<tr>
<th>Organization</th>
<th>Year</th>
<th>Amount</th>
<th>Last Mod. Date</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Yale University</strong></td>
<td>1</td>
<td>$244,150</td>
<td>Jun-27-2006 16:42:02</td>
</tr>
<tr>
<td><strong>Budget Justification</strong></td>
<td>2</td>
<td>$12,600</td>
<td>Jun-27-2006 16:41:37</td>
</tr>
</tbody>
</table>

**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).
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 **Institution Search** screen displays (Figure
4) for you to search for the name of the new awardee organization in the list of NSF registered organizations.

Figure 3 Request Details section of the Grant Transfer Request screen. The Select New Awardee Organization button is circled.

5. In the box (Figure 4), type the string (at least three characters) to search for.

6. Select the search type option (Figure 4):
   - Begins with returns all organizations whose name begins with the text entered.
   - Ends with returns all organizations whose name ends with the text entered.
   - Contains returns all organizations whose name contains the text entered.

7. Click the Locate button (Figure 4). The Institutions Located screen displays (Figure 5).

Figure 5 Institutions Located screen. The Select button is circled.

8. Highlight the name of the new awardee organization (Figure 5).

9. Click the Select button (Figure 5). The Grant Transfer Request screen displays (Figure 6) with the name of the new awardee organization in the Request Details section.
10. 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 6](image)

**Figure 6**  Request Details section of the Grant Transfer Request screen. The View Contact Information link is circled.

11. In the **Request Details** section of the **Grant Transfer Request** screen (Figure 8), click the **Add/Change Primary Place Of Performance** button to enter the name of the new Primary Place of Performance. The **Add/Change Primary Place Of Performance** screen displays (Figure 9).

![Figure 8](image)

**Figure 8**  Request Details section of the Grant Transfer Request screen. The Add/Change New Primary Place Of Performance button is circled.
Figure 9    Add/Change Primary Place of Performance screen. The Save Primary Place of Performance button is circled.

12. In the box (Figure 9), type the Organization Name in the box or select Same as Awardee Organization, if this option is applicable (Figure 9).

13. Enter the full address of the Primary Place of Performance:
   - Enter the Street Address.
   - Enter the City.
   - Select the State from the drop down list if the Country is United States.
   - Enter the Zip Code (9 digit).
   - Select the Country from the drop down list.

14. Click the Save Primary Place of Performance button (Figure 9). The Grant Transfer Request screen displays (Figure 10) with the name of the new primary place of performance in the Request Details section.

Figure 10    Request Details section of the Grant Transfer Request screen with the name of the New Awardee Organization and the New Primary Place of Performance displayed.

15. In the Total Estimated Disbursements and Unpaid Obligations at the Start Date Of Transfer box on the Grant Transfer Request screen (Figure 11), type the total estimate of disbursements and unpaid obligations for the grant (no dollar sign, no commas).
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](image)

*Figure 1  Notifications and Requests screen on the Forwarded by PI tab. The Notification/Request Type link is circled for a PI/PD or co-PI/co-PD Transfer Request.*

2. On the **Notifications and Requests** screen on the **Forwarded by PI** tab (Figure 1), find the PI Transfer Request you want to work on (see [Search for Notifications and Requests](#)).

3. Click the **Notification/Request Type** link on the row for that request (Figure 1). The **Grant Transfer Request** screen displays (Figure 2).
4. Click the **Save and Continue** button (Figure 2). The **Click on a Link to Work** screen displays (Figure 3). You
have these options on the **Click on a Link to Work** screen:

- Edit transfer request forms
- Check for completeness
- Forward transfer request to new SPO
- Return transfer request to PI
- Cancel transfer request

(Click on a link above for instructions for that option.)

**Figure 3**   Click on a Link to Work screen with the options for work on the PI/PD or co-PI/co-PD Transfer Request.

*Edit Transfer Request Forms as Original SPO*

1. Access the **Click on a Link to Work** screen (Figure 1) (see [Prepare a PI Transfer Request](#) or [Work on a PI Transfer Request Forwarded by a PI](#)).

   **Figure 1**   Click on a Link to Work screen. The Edit Transfer Request Forms link is circled.

2. On the **Click on a Link to Work** screen (Figure 1), click **Edit Transfer Request Forms**. The **Form Preparation** screen displays (Figure 2) with the forms for the PI Transfer Request. The forms are:

- Progress Summary (required)
- Budgets (Including Justification) (required)
- PI/Co-PI Information
- Description of Work to Be Accomplished (required)
- Supplementary Documents
- Add/Delete Senior Personnel
(Click on a link above for the instructions for that form.)

**Forms for Temp. Proposal #A113255**

**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>N/A</td>
<td>Project Summary</td>
<td>11/27/12</td>
</tr>
<tr>
<td>Table of Contents</td>
<td></td>
<td>Project Description</td>
<td></td>
</tr>
<tr>
<td>References Cited</td>
<td></td>
<td>Biographical Sketches</td>
<td></td>
</tr>
<tr>
<td>Budgets (Including Justification)</td>
<td>11/05/12</td>
<td>Current and Pending Support</td>
<td></td>
</tr>
<tr>
<td>Facilities, Equipment, and Other Resources</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Supplementary Documents**

<table>
<thead>
<tr>
<th>Form</th>
<th>Saved</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data Management Plan</td>
<td>02/26/12</td>
</tr>
<tr>
<td>Mentoring Plan</td>
<td></td>
</tr>
<tr>
<td>Project Summary with Special Characters</td>
<td></td>
</tr>
<tr>
<td>Other Supplementary Docs</td>
<td></td>
</tr>
</tbody>
</table>

**Single Copy Documents**

<table>
<thead>
<tr>
<th>Form</th>
<th>Saved</th>
</tr>
</thead>
<tbody>
<tr>
<td>PI Co-PI Information</td>
<td>N/A</td>
</tr>
<tr>
<td>Delegation Authorization (if applicable)</td>
<td></td>
</tr>
<tr>
<td>List of Suggested Reviewers (optional)</td>
<td></td>
</tr>
<tr>
<td>Additional Single Copy Documents</td>
<td></td>
</tr>
<tr>
<td>Add/Delete Non Co-PI Senior Personnel</td>
<td>N/A</td>
</tr>
<tr>
<td>Change PI</td>
<td></td>
</tr>
<tr>
<td>Link Collaborative Proposals</td>
<td></td>
</tr>
</tbody>
</table>

**Go Back**

---

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.

If the PI Transfer Request is complete, the Completeness Checking of Request for Grant Transfer screen displays as in Figure 3. The request is ready to be forwarded to the new SPO (see Forward a PI Transfer Request to the New SPO).

Figure 3  Completeness Checking of Request for Grant Transfer screen with a message that the request is complete.

Forward a PI/PD or co-PI/co-PD Transfer Request to the New SPO

Only the original SPO can forward a PI/PD or co-PI/co-PD Transfer Request to the new SPO.

1. Access the Click on a Link to Work screen (Figure 1) (see Prepare a PI/PD or co-PI/co-PD Transfer Request or Work on a PI/PD or co-PI/co-PD Transfer Request Forwarded by a PI).
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.

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

**Figure 1** Click on a Link to Work screen. The Forward Transfer Request to New SPO link is circled.

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

**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](image)

**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](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).
4. Click the Continue button (Figure 3). The Click on a Link to Work screen displays (Figure 4) with options to:
   - View transfer request forms
   - Cancel (delete) the transfer request

Figure 3  Grant Transfer Request Returned to PI screen. The Continue button is circled.

Figure 4  Click on a Link to Work screen after you have returned the PI Transfer Request to the PI.

Delete a PI Transfer Request as Original SPO

1. Access the Click on a Link to Work screen (Figure 1) (see Prepare a PI Transfer Request or Work on a PI Transfer Request Forwarded by a PI).

Figure 1  Click on a Link to Work screen. The Cancel Transfer Request link is circled.

2. On the Click on a Link to Work screen (Figure 1), click Cancel Transfer Request. The Delete the Grant Transfer Request screen displays (Figure 2) with a message for you to confirm that you want to delete the PI Transfer Request.
Figure 2  Delete the Grant Transfer Request screen. The Delete button screen is circled.

3. Click the **Delete** button (Figure 2). The PI Transfer Request is deleted.

**View PI Transfer Request Forms as Original SPO**

1. Access the **Click on a Link to Work** screen (Figure 1) (see [Forward a PI Transfer Request to the New SPO](#) or [Return a PI Transfer Request to the PI](#)).

Figure 1  Click on a Link to Work screen. The View Transfer Request Forms button is circled.

2. On the **Click on a Link to Work** screen (Figure 1), click **View Transfer Request Forms** to view the forms for the PI Transfer Request. The **Print Menu** screen displays (Figure 2) with a listing of the forms in the PI Transfer Request.
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).
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).
**Figure 2** Grant Transfer Request screen. The Save and Continue button is circled.
4. On the lower portion of the **Grant Transfer Request** screen (Figure 3), if the project involves any of the following, click the radio button next to the category:
   - Human subjects
   - Vertebrate animals
   - Disclosure of lobbying activities (see "Disclosing Lobbying Activities")

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**

---

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**Figure 3**  **Lower portion of the Grant Transfer Request screen.**

**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**).
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).
Figure 2  Grant Transfer Request screen. The Save and Continue button is circled.

4. On the lower portion of the Grant Transfer Request screen (Figure 3), if the project involves any of the following, click the radio button next to the category:
FastLane Help

- Human subjects
- Vertebrate animals
- Disclosure of lobbying activities (see "Disclosing Lobbying Activities")

Check the appropriate checkbox(es) if the proposal requested for transfer include any of the items listed below:

- Human subjects
- Vertebrate animals
- Disclosure of lobbying activities

Figure 3  Lower portion of the Grant Transfer Request screen.

5. On the lower portion of the Grant Transfer Request screen (Figure 3), do either of the following:
   - In the Exemption Subsection box, type the exemption number.
   - In the IRB APP Date box, type the IRB date (in mm/dd/yyyy format).

6. In the lower portion of the Grant Transfer Request screen (Figure 3), in the IACUC App. Date box, type the date (in mm/dd/yyyy format).

7. Click the Save and Continue button (Figure 2). The Click on a Link to Work screen displays (Figure 4). You have these options on the Click on a Link to Work screen:
   - Edit transfer request forms
   - Check for completeness
   - Submit transfer request to NSF (AOR only)
   - Return transfer request to the original SPO
   - Cancel (delete) transfer request

Figure 4  Click on a Link to Work screen with the new SPO's options for working on the PI Transfer Request.

**Edit Transfer Request Forms as New SPO**

1. Access the Click on a Link to Work screen (Figure 1) (see Work on a PI Transfer Request Forwarded by the Original AOR).
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.
FastLane Help

**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).

   ![Click on a Link to Work screen. The Check for Completeness button is circled.](Image)

   **Figure 1** Click on a Link to Work screen. The Check for Completeness button is circled.

2. On the **Click on a Link to Work** screen (Figure 1), click **Check for Completeness**. The **Completeness Checking of Request for Grant Transfer** screen displays.

   *If the PI Transfer Request is incomplete*, the **Completeness Checking of Request for Grant Transfer** screen displays as in Figure 2 with a message on which forms still require completion for submission.

   ![Completeness Checking of Request for Grant Transfer screen. Circled is the message of what form requires completion for submission.](Image)

   **Figure 2** Completeness Checking of Request for Grant Transfer screen. Circled is the message of what form requires completion for submission.

   *If the PI Transfer Request is complete*, the **Completeness Checking of Request for Grant Transfer** screen displays as in Figure 3. The request is ready to be submitted to NSF (see Submit a PI Transfer Request).

   ![Completeness Checking of Request for Grant Transfer screen.](Image)

   **Figure 3** Completeness Checking of Request for Grant Transfer screen.
FastLane Help

Completeness Checking of Request for Grant Transfer

Award Information:

<table>
<thead>
<tr>
<th>Original Grant Number</th>
<th>0301338</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>Compact Advanced Hybrid Actuators Using Electro-Rheological Fluids</td>
</tr>
<tr>
<td>Original Grantee Name</td>
<td>Rutgers University New Brunswick</td>
</tr>
</tbody>
</table>

---

Request is complete.

Figure 3 Completeness Checking of Request for Grant Transfer screen with a message that the request is complete.

Submit a PI Transfer Request to NSF (AOR only)

Only the new SPO can submit the PI Transfer Request to NSF.

1. Access the Click on a Link to Work screen (Figure 1) (see Work on a PI Transfer Request Forwarded by the Original AOR).

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

   Figure 1 Click on a Link to Work screen. The Submit Transfer Request to NSF link is circled.

2. On the Click on a Link to Work screen (Figure 1), click Submit Transfer Request to NSF.

   If the request is not complete, the Completeness Checking of Request for Grant Transfer screen displays (Figure 2) with a message on what forms require completion for submission to NSF.
Completeness Checking of Request for Grant Transfer

- Award Information:
  - Original Grant Number: 0407644
  - Title: Quantum Dynamics in Random Media, QED and Renormalization
  - Original Grantee Name: New York University

- Please complete Budget Justification for Inst.Id 0026278000

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).

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. The Debarment and Suspension Certification section and the Submit button are circled.

4. In the Debarment and Suspension Certification section (Figure 4), click the radio button for Yes or No.
5. If you clicked the radio button for Yes, type an explanation in the box (Figure 4).
6. Click the Sign and Submit button (Figure 6). The Grant Transfer Request Submitted to NSF screen displays (Figure 5) with a list of the people who will receive an email that the request has been submitted to NSF.
Figure 5  Grant Transfer Request Submitted to NSF screen with the list of the individuals who will be notified on the new status of the PI Transfer Request. The Continue button is circled.

10. Click the Continue button (Figure 5). The Click on a Link to Work screen displays (Figure 6) with only the option to view the transfer request.

Figure 6  Click on a Link to Work screen after you have submitted the PI Transfer Request to NSF.

Return a PI Transfer Request to the Original SPO

1. Access the Click on a Link to Work screen (Figure 1) (see Work on a PI Transfer Request Forwarded by the Original AOR).
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.

![Figure 1: Click on a Link to Work screen. The Cancel Transfer Request link is circled.](image)

3. Click the **Delete** button (Figure 2). The **Grant Transfer Request Deleted** screen displays (Figure 3) with the message that the PI Transfer Request has been deleted and with a list of people who will be notified by email of the deletion.

![Figure 2: Delete the Grant Transfer Request screen. The Delete button is circled.](image)

![Figure 3: Grant Transfer Request Deleted screen.](image)

*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.](image)

   **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.](image)

   **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).
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.)

![Figure 2 Form Preparation screen.](image)

*Edit Transfer Request Forms Introduction*

1. **Access the Click on a Link to Work** screen (Figure 1):
   - If you are a PI, see [Prepare a PI Transfer Request as a PI](#).
   - If you are the original SPO, see either of the following:
     - [Prepare a PI Transfer Request as an SPO/AOR](#)
     - [Work on a PI Transfer Request Forwarded by a PI](#)
   - If you are the new SPO, see [Work on a PI Transfer Request Forwarded by the Original AOR](#).

![Figure 1 Click on a Link to Work screen](image)

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.)

---

### 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**
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.

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](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).

![Figure 1](image1.png)  **Form Preparation screen. The Go button for Budgets (Including Justification) is circled.**

![Figure 2](image2.png)  **Project Budget screen.**

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).

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
Description of work to be Accomplished

NEW! File uploads no longer have to be in PDF format!

In addition to PDF files, users can now upload a variety of word-processor files and PostScript files. These files will automatically be converted to PDF format.

Follow the link for a list of Supported File Formats (Opens in new window).

Follow the link for New Upload Instructions (Opens in new window).

Note: Clicking on the Display Current Description of work to be Accomplished button will display a PDF document in this window.

Once you have reviewed the document, click on the browser's "Back" button to return to this page.

Figure 3Description 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

   ![Supplementary Docs screen](image1.png)

   Figure 2 Supplementary Docs screen. The Save Text button is circled.

Enter Other Supplementary Documents in the Text Box

1. Type in or copy and paste the Other Supplementary Document in the text box (Figure 2).
2. Click the Save Text button (Figure 2). A screen displays (Figure 3) with the message that the Supplementary Document data is saved.

   ![Data for Other Supplementary Docs form saved](image2.png)

   Figure 3 Screen with the message that the Other Supplementary Document text has been saved.

4. Click the OK button (Figure 2). The Form Preparation screen displays.

Upload Other Supplementary Documents

1. On the Other Supplementary Docs screen (Figure 4), click the Transfer File button. The Supplementary Document File Upload screen displays (Figure 5). See Upload a File for directions.
Figure 4  Other Supplementary Docs screen. The Transfer File button is circled.

Figure 5  Supplementary Documents File Upload screen.

Once the Supplementary Document has been uploaded, the Supplementary Document File Upload screen displays as in Figure 6.
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
FastLane Help

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](image1.png)

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](image2.png)

Add/Delete Non Co-Principal Investigator (Co-PI) Senior Personnel Assigned to Proposal

Note: Depending on the status of the PI transfer request and type of the user, some forms are editable and some are view only.

Forms for Temp. Proposal 5/00/2042

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>Go</td>
<td></td>
<td>Go</td>
<td></td>
</tr>
<tr>
<td>Progress Summary</td>
<td></td>
<td>Description of Work to be Accomplished</td>
<td></td>
</tr>
<tr>
<td>Go</td>
<td></td>
<td>Budgets (Including Justification)</td>
<td></td>
</tr>
<tr>
<td>Supplementary Documents</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Go</td>
<td></td>
<td>Mentoring Plan</td>
<td></td>
</tr>
<tr>
<td>Go</td>
<td></td>
<td>Other Supplementary Docs</td>
<td></td>
</tr>
<tr>
<td>Go</td>
<td></td>
<td>Add/Delete Non Co-PI Senior Personnel</td>
<td>N/A</td>
</tr>
</tbody>
</table>

1Please be advised that many Postdoctoral Fellowship programs do not require, and may not allow, submission of a separate mentoring plan if the proposal is submitted to NSF by an individual applicant. Please refer to the specific Fellowship program solicitation to determine whether or not submission of the postdoctoral researcher mentoring plan is required.

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

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).
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
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 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).

![Request for Award 0707551 - Change PI and Add/Change Co-PI](image)

**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.**
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
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**  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).
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.

![Confirm Eligibility of Proposed PI/co-PI section of the Change PI and Add/Change Co-PI screen. The NSF ID/Email Address box and the Check button are circled.](image)

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).
Figure 7  Request for Change PI and Add/Change Co-PI screen.

Step 2  Upload the Associated Documents

1. Access the Request for Change PI and Add/Change Co-PI screen (see Step 1 Confirm the Eligibility of the Proposed PI/Co-PI). As soon as you have confirmed the eligibility of the PI or Co-PI in Step 1, the Associated Documents section of the Request for Change PI and Add/Change Co-PI screen activates (Figure 1).
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.
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).
2. In the Justification box (Figure 1), type or copy and paste a Justification for the change of PI or Co-PI.
3. Click the Save button (Figure 1) to save the Justification and to save your Change PI Request. The View Request for Change PI and Add/Change Co-PI screen displays (Figure 2), and the buttons for these functions are activated:
   - Modify the request
   - Delete the request
   - Forward the Request to the SPO (if you are a PI)
   - Submit the request to NSF (if you are an AOR)
     (Click on a link above for instructions for that option.)
Figure 2 Request for Change PI and Add/Change Co-PI screen. The buttons to Modify Request, Delete Request, Cancel, and Forward to SPO (if you are a PI) or Submit to NSF (if you are an AOR) are circled.

Modify a Change PI and Add/Change Co-PI Request

1. Access the View Request for Change PI and Add/Change Co-PI screen (Figure 1). See one of the following:
   - Step 3 Justification
   - View a Notification or Request Prepared by the PI
   - View a Notification or Request Prepared by the SPO
2. Click the Modify Request button (Figure 1). The Request for Change PI and Add/Change Co-PI screen displays (Figure 2) with only the section for Step 1, Confirm Eligibility of Proposed PI/Co-PI, activated.
Figure 2  Request for Change PI and Add/Change Co-PI screen. The Check button is circled.

3. Make any changes to this section that you require (see Step 1, Confirm Eligibility of the Proposed PI/Co-PI).
4. Click the **Continue** button (Figure 2). Step 2 is activated on the **Request for Change PI and Add/Change Co-PI** screen (Figure 3).

![Request for Award 0707543 - Change PI and Add/Change Co-PI](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 5 Request for Change PI and Add/Change Co-PI screen. The buttons to Modify Request, Delete Request, Cancel, and Forward to SPO (if you are a PI) or Submit to NSF (if you are an SPO) are circled.

Forward a Change PI and Add/Change Co-PI Request to the SPO

Only a PI may forward a Change PI and Add/Change Co-PI Request to the SPO.

1. Access the View Request for Change PI and Add/Change Co-PI screen (Figure 1) (see Step 3 Justification or View a Notification or Request Prepared by the PI).
Figure 1 Request for Change PI and Add/Change Co-PI screen. The Forward to SPO button is circled.

1. 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.
FastLane Help

Figure 2  Request for Change PI and Add/Change PI screen. The message for you to confirm that you want to forward the request to the SPO and the Forward to SPO button are circled.

3. Click the Forward to SPO button (Figure 2). The Forwarded screen displays (Figure 3) with the message that the request has been forwarded to your SPO.

Figure 3  Forwarded screen with the message that the request has been forwarded to the SPO.

4. Click the Search Prepared by PI List link (Figure 3). The Notifications and Requests screen displays on the Prepared by PI tab.

Submit a Change PI and Add/Change Co-PI Request (AOR only)

Only an AOR may submit a Change PI and Add/Change PI Request.

Note: This document shows how to submit a request that the SPO has prepared. See Submit a Request Forwarded by the PI for instructions on how to submit a Change PI and Add/Change Co-PI Request that has been forwarded by the PI.

1. Access the Request for Change PI and Add/Change Co-PI screen (Figure 1). For how to access the screen, see Step 3 Justification or View a Notification or Request Prepared by the SPO.
2. On the Request for Change PI and Add/Change Co-PI screen (Figure 1), click the Submit to NSF button (Figure 1). The Submit Request for Add/Change PI screen displays (Figure 2) with a message for you to confirm that you want to submit the request to NSF.

**Figure 1** Request for Change PI and Add/Change Co-PI screen. The Submit to NSF button is circled.

**Figure 2** Request for Change PI and Add/Change PI screen. The message for you to confirm that you want to submit the request to NSF and the Submit to NSF button are circled.
3. Click the **Submit to NSF** button (Figure 2). If you have permissions as an Authorized Organizational Representative (AOR), the **Verify Signature Information** screen displays (Figure 3) with a message for you to verify your information as an AOR.

![Verify Signature Information screen](image)

**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.

![Submitted screen](image)

**Figure 4** Submitted screen with the message that the Change PI and Add/Change Co-PI Request has been submitted to NSF.

6. Click the **Search Prepared by SPO List** (Figure 4). The **Notifications and Requests** screen displays on the **Prepared by SPO** tab.
Delete a Change PI and Add/Change Co-PI Request

1. Access the View Request for Change PI and Add/Change Co-PI screen (Figure 1). See one of the following:
   - Step 3 Justification
   - View a Notification or Request Prepared by the PI
   - View a Notification or Request Prepared by the SPO

   ![Request for Award 1504659 - Change PI and Add/Change Co-PI screen. The Delete Request button is circled.](image)

   **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 Co-PI screen. The message for you to confirm that you want to delete the request and the Delete Request button are circled.

3. Click the Delete Request button (Figure 2). The Deleted screen displays (Figure 3) with the message that the request has been deleted.

Figure 3 Deleted screen with the message that the Change PI and Add/Change Co-PI Request has been deleted.

4. Click the Search Prepared by SPO List (Figure 3). The Notifications and Requests screen on the Prepared by SPO tab displays. (If you are a PI, the Search Prepared by PI List link displays on the Change PI and Add/Change Co-PI screen. Click the link, and the Notifications and Requests screen on the Prepared by PI tab displays.)

Request Functions

Request Functions Introduction
After you have initiated a request, you have these options for further working:
FastLane Help

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

**Subawarding, Transferring or Contracting Out Part of an NSF Award**

**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.

- Description of work to be performed
  - Saved Form: 02/17/16
- Budgets (including Justification) *
  - Saved Form: 02/17/16
- Add/Delete Senior Personnel (other than PI/Co-PI)
  - Saved Form: N/A

**Certification for Authorized Organizational Representative**

By electronically signing the proposal, 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. Withholding of false information in this request and its supporting documents or in reports required under an ensuing award is a criminal offense (U.S. Code, Title 18, Section 1001).

- Sign and Submit
- Delete This Request
- Go Back

---

**Figure 3**  **View Request screen with your modifications displayed.**

**Forward a Request to the SPO**

Only a PI can forward a request to the SPO.

**Note:** To forward requests for **Addition of Subaward**, **Change PI and Add/Change Co-PI**, and **PI Transfer**, see the instructions for that particular form.

1. Access the **View Request** screen (Figure 1) (for Changes in Objective or Scope, as an example). See either of the following:
   - Instructions for the type of request you are working on
   - **View a Request Prepared by the PI**
Subawarding, Transferring or Contracting Out Part of an NSF Award

Award Number: 1427812
Title: MRI: Development of and Broad-Based Materials Research with the Next Generation Nanomechanical Testing Laboratory

Form Preparation

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

- **Description of work to be performed**
  - Saved: 02/17/16
- **Budgets (Including Justification)**
  - Saved: 02/17/16
- **Add/Delete Senior Personnel (other than PI/Co-PI)**
  - Saved: N/A

**Form** | **Saved** | **Form** | **Saved**
--- | --- | --- | ---
Description of work to be performed | 02/17/16 | Justification for Subrecipient | 02/17/16
Budgets (Including Justification) | 02/17/16 | Other Supplementary Docs | N/A
Add/Delete Senior Personnel (other than PI/Co-PI) | N/A

[Buttons: Print, Forward to SRO, Delete This Request, Go Back]
2. On the **View Request** screen (Figure 1), click the **Forward to SRO** button. The **Forwarded** screen displays (Figure 2) with a message that the request has been forwarded to the SPO.

![Subaward Request was forwarded.](image)

---

**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
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.

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**Subaward Request was submitted and signed.**

Wed Feb 17 17:02:52 EST 2016

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**National Science Foundation**

4201 Wilson Boulevard

Arlington, Virginia 22230, USA

Tel: 703-292-5111

FIRS: 800-877-8339

TDD: 703-292-5090
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

Figure 1  View Request screen. The Delete button is circled.

2. On the View Request screen (Figure 1), click the Delete button. The Deleted screen displays (Figure 2) with the message that the request has been deleted.
Continuation Funding Status

Check Continuation Funding Status Introduction

Both the Principal Investigator (PI) and the Sponsored Project Office (SPO) representative can check the continuation funding status for an award. The status check reports:

- Amount of the incremental funding supplements
- Fiscal year for each funding supplement
- If the funding supplement has been awarded or is still pending

You can:
- Check continuation funding status as a PI
- Check continuation funding status as an SPO/AOR

Check Continuation Funding Status Introduction

Both the Principal Investigator (PI) and the Sponsored Project Office (SPO) representative can check the continuation funding status for an award. The status check reports:

- Amount of the incremental funding supplements
- Fiscal year for each funding supplement
- If the funding supplement has been awarded or is still pending

You can:
- Check continuation funding status as a PI
- Check continuation funding status as an SPO/AOR

Check Continuation Funding Status as a PI

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

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.
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 4**  **Continuing Grant Increments Search Results screen. The award number is circled for an 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

Access View/Print Award Documents

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).

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 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).

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).
FastLane Help

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**

610
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](image)
   
   **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 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](image)
   
   **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 an SPO/AOR).
Documents as a PI or View and Print Award Documents as an SPO/AOR.

**Figure 1** Award Documents screen on the Active Awards tab. The award number is circled for an award.

2. On the Award Documents screen on the Active Awards tab (Figure 1), click the award number on the row for the award whose documents you want to view. The National Science Foundation screen displays (Figure 2) for that award.

**Figure 2** National Science Foundation screen. The View Print-Friendly Version link is circled.

3. To print the award, click View Print-Friendly Version (Figure 2). The award letter displays (Figure 3) in a print-friendly version.
FastLane Help

Figure 3  Print-friendly version of the award letter.

4. Click the Print command on your browser to print the award letter.

View a Cooperative Agreement

View a Cooperative Agreement

If an award is a Cooperative Agreement established after March 2005, you can view the Cooperative Agreement and its associated documents.

1. Access the Award Documents screen on the Active Awards tab (Figure 1) (see View and Print Award Documents as a PI or View and Print Award Documents as an SPO/AOR).

![Award Documents screen](image)

Figure 1  Award Documents screen on the Active Awards tab. The award number is circled for an award.

2. On the Award Documents screen on the Active Awards tab (Figure 1), click the award number on the row for the award whose documents you want to view. The Cooperative Agreement screen displays (Figure 2) for that award. You have these options on the screen:
   - Choose an award version to view
   - View the amended expiration dates for an award
   - View the awarded funds by amendment
   - View the list of awards for the award’s NSF program
   - View the last notice sent
   - View the original and amended budgets
   - View the prior award (available to PIs only)
   - View the award document in PDF format (Click on a link for instructions for that action.)
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).

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.
3. When you have completed your award search, close the Award Search screen (Figure 2). The Cooperative Agreement screen displays (Figure 1).

**View the Last Notice Sent**

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

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.

**Figure 1**  Cooperative Agreement screen. The Budget link is circled.

**Figure 2**  Consolidated Award Budget screen with the original award budget and the budget for each amendment.

**View the Prior Award**

Only PIs can view a prior award.

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

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](image1.png)

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

![Figure 2](image2.png)

**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).
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. 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.

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. 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.

2. 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 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.png)

**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).
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 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).

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.)

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**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).

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

4. Highlight the award for which you want to edit a Supplemental Funding Request (Figure 3).
5. Click the Prepare Supplemental Funding Request button (Figure 3). The Request for Supplemental Funding screen displays (Figure 4).

Figure 4  Request for Supplemental Funding screen. The Edit button is circled.

6. Highlight the Supplemental Funding Request you want to edit (Figure 4).
7. Click the Edit button (Figure 4). The Form Preparation screen displays (Figure 5).
Figure 5  **Form Preparation screen.**

8. Edit the forms as you require:
   - Summary of Proposed Work
   - Budgets (Including Justification)
   - Add/Delete Non-Co-PI Senior Personnel
   - Justification for Supplement
   - Supplementary Documents
   - Revised End Date (if applicable)
   (Click on a form above for instructions on completing that form.)

**Allow or Remove SPO Access to Supplemental Funding Request**

**Allow or Remove SPO/AOR Access to a Supplemental Funding Request**

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

![Figure 3](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.)

![Figure 4](image2)

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

![Figure 5](image3)

**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](image)

**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).
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

Go Back

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

**Allow SPO to View But Not Submit a Supplemental Funding Request**

1. Access the Sponsored Project Office (SPO) Access Control screen (Figure 1) (see Allow or Remove SPO Access to a Supplemental Funding Request).
Figure 1  Sponsored Project Office Access Control screen. The Go button for Allow SPO to Only View Proposal But Not Submit is circled.

2. On the Sponsored Project Office (SPO) Access Control screen (Figure 1), click the Go button for Allow SPO to Only View Proposal But Not Submit. A screen displays (Figure 2) with a message that the SPO can now view but not edit or submit the Supplemental Funding Request.

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

3. Click the OK button (Figure 2). The Request for Supplemental Funding screen displays.

Allow SPO to View and Edit But Not Submit a Supplemental Funding Request

1. Access the Sponsored Project Office (SPO) Access Control screen (Figure 1) (see Allow or Remove SPO Access to a Supplemental Funding Request).

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

2. On the Sponsored Project Office (SPO) Access Control screen (Figure 1), click the Go button for Allow SPO to View and Edit But Not Submit Proposal. A screen displays (Figure 2) with a message that the SPO can now view and edit but not submit the Supplemental Funding Request.
FastLane Help

The SPO can now view and edit proposal 7396346

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

3. Click the OK button (Figure 2). The Request for Supplemental Funding screen displays.

Allow AOR to View, Edit, and Submit a Supplemental Funding Request

1. Access the Sponsored Project Office (SPO) Access Control screen (Figure 1) (see Allow or Remove SPO Access to a Supplemental Funding Request).

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

2. On the Sponsored Project Office (SPO) Access Control screen (Figure 1), click the Go button for Allow AOR to View, Edit, and Submit Proposal. A screen displays (Figure 2) with a message that the AOR now has full access to the request. The screen also lists the individuals who will receive emails from FastLane on the request’s new access status.

Figure 2 Screen with the message that the AOR now has full access to the Supplemental Funding Request and with the list of people NSF will notify of the AOR's access. The OK button is circled.

3. Click the OK button (Figure 2). The Request for Supplemental Funding screen displays.

Remove SPO/AOR Access to a Supplemental Funding Request

1. Access the Sponsored Research Office (SPO)/AOR Access Control screen (Figure 1) (see Allow or Remove SPO Access to a Supplemental Funding Request).
Figure 1  Sponsored Project Office (SPO) Access Control screen.

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

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

3. Click the OK button (Figure 2). The Request for Supplemental Funding screen displays.

Print a Supplemental Funding Request

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

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).

![Figure 2](image1.png)

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

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

![Figure 3](image2.png)

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

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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).

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)

**Figure 4**  
Request for Supplemental Funding screen. The Delete button is circled.

6. Highlight the Supplemental Funding Request you want to delete (Figure 4).
7. Click the **Delete** button (Figure 4). A screen displays (Figure 5) with a message for you to confirm that you want to delete the request.

![Delete the proposal](image)

**Figure 5**  
Screen with a message for you to confirm that you want to delete the request.

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

![Temp Proposal](image)

**Figure 6**  
Screen with the message that the Supplemental Funding Request has been deleted.

9. Click the **OK** button. The **Request for Supplemental Funding** screen displays (Figure 4).

**SPO Functions**
Work on a Supplemental Funding Request as an SPO

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

![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) with a listing of all your organization’s documents in progress. Supplemental Funding Requests are categorized as Supplements in the Type column.

![Proposals/Supplements/File Updates/Withdrawals Screen](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.
Figure 2  Proposals/Supplements/File Updates/Withdrawals screen on the Documents in Progress tab. The award number for a Supplemental Funding Request is circled.

3. Click the **Type** column heading to group all the Supplemental Funding Requests. On the Proposals, Supplements/File Updates/Withdrawals screen, you have these options:
   - **Check a Supplementary Funding Request**
   - **Edit a Supplementary Funding Request**
   - **View/Print a Supplementary Funding Request**
   - **Return a Supplementary Funding Request to the PI**
   - **Submit a Supplementary Funding Request to NSF (AOR only)**
   - **Withdraw a Supplementary Funding Request from NSF (AOR only)**

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**
• **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.)

![Form Preparation screen.](image)

**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**.

![Proposals/Supplements/File Updates/Withdrawals screen](image)

**Figure 1**  
**Proposals/Supplements/File Updates/Withdrawals screen on the Documents in Progress tab.** The award number for a Supplemental Funding Request is circled.

2. On the **Proposals/Supplements/File Updates/Withdrawals** screen on the **Documents in Progress** tab (Figure 1), click the award number on the row for the Supplemental Funding Request you want to view. The **View Proposal** screen displays (Figure 2).
FastLane Help

Figure 2 View Proposal screen. The Go button for Print Entire Proposal is circled.

3. Click the Go button for any form to view that form (Figure 2).
4. To print the entire Supplemental Funding Request, on the View Proposal screen, click the Go button (Figure 2) for Print the Entire Proposal. FastLane concatenates the forms and displays the Supplemental Funding Request in PDF format. If you need Adobe Reader, see Adobe Reader for FastLane.
5. On the PDF screen, click the Printer icon in the upper left of the screen. The Supplemental Funding Request prints in PDF format.
6. Click the browser back button to return to the View Proposal screen (Figure 2).

Submit a Supplemental Funding Request (AOR only)

1. Access the Proposals/Supplements/File Updates/Withdrawals screen (Figure 1) (see Work on a Supplemental Funding Request).

2. On the Proposals/Supplements/File Updates/Withdrawals screen on the Documents in Progress tab (Figure 1), click Submit on the row for the Supplemental Funding Request that you want to submit to NSF. The Proposals Errors/Warnings screen displays (Figure 2) with the Cover Sheet for the request (Figure 2) and the Debarment and Suspension Certification section (Figure 3).
Figure 2  Upper portion of the Proposal Errors/Warnings screen with links to the rest of the screen.

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.

3. In the Debarment and Suspension section of the Proposal Errors/Warnings screen (Figure 3), click the radio button for Yes or No if there are any debarments or suspensions of you or of your organization from transactions with federal agencies.

4. If you answered Yes, in the text box under the radio buttons (Figure 3), type an explanation.

5. In the Institution Information section of the Proposal Errors/Warnings screen (Figure 4), check the accuracy of the information for your organization.
6. At the bottom of the Proposal Errors/Warnings screen (Figure 4), click the Sign and Submit button. The Proposal Submission Confirmation screen displays (Figure 5) with a message that the Supplemental Funding Request has been successfully submitted to NSF. It also displays the official NSF number for the Supplemental Funding Request.

Figure 5 Proposal Submission Confirmation screen with the message that the Supplemental Funding Request has been submitted to NSF and with the NSF number for the Supplemental Funding Request.

Return a Supplemental Funding Request to the PI

1. Access the Proposals/Supplements/File Updates/Withdrawals screen on the Documents in Progress tab (Figure 1) (see Work on a Supplemental Funding Request).
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.

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](image1.png)

**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](image2.png)

**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).

![Proposal Withdrawal Screen](image)

**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](image)

**Figure 1** Form Preparation screen. The Go button for Summary of Proposed Work is circled.

2. On the Form Preparation screen (Figure 1), click the Go button for Summary of Proposed Work. The Summary of Proposed Work screen displays (Figure 2).

![Summary of Proposed Work Screen](image)

**Figure 2** Summary of Proposed Work screen. The Save Text button iscircled.

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
FastLane Help

- **Delete Current Summary of Proposed Work**
- **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 redisplay with the text box. See [Enter the Summary of Proposed Work in the Text Box](#).

**Budgets (Including Justification) for a Supplemental Funding Request**

1. Access the **Form Preparation** screen (Figure 1) (see [Prepare a Supplementary Funding Request](#) or [Edit a...](#))
Supplementary Funding Request as an SPO/AOR).

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

2.  On the Form Preparation screen (Figure 1), click the Go button for Budgets (Including Justification). The Project Budget screen displays (Figure 2). See Budgets (Including Justification) and Create a Budget, Step 2 for instructions on how complete a budget for the subawardee organization.

Figure 2  Project Budget screen.

Add/Delete Non-Co-PI Senior Personnel for a Supplemental Funding Request

1.  Access the Form Preparation screen (Figure 1) (see Prepare a Supplementary Funding Request or Edit a Supplementary Funding Request as an SPO/AOR).
Figure 1  **Form Preparation screen. The Go button for Add/Delete Non-Co-PI Senior Personnel is circled.**

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

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

**Justification for a Supplemental Funding Request**

1. **Access the Form Preparation screen** (Figure 1) (see **Prepare a Supplementary Funding Request** or **Edit a Supplementary Funding Request as an SPO/AOR**).
2. On the **Form Preparation** screen (Figure 1), click the **Go** button for Justification for Supplement. The **Justification for Supplement** screen displays (Figure 2).

![Form Preparation screen. The Go button for Justification for Supplement is circled.](image)

**Figure 1**  Form Preparation screen. The Go button for Justification for Supplement 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.

![Data for Justification For Supplement form saved.](image)

**Figure 2**  Justification for Supplement screen. The Save Text button is circled.

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FastLane Help

Figure 3  Screen with a message that the Justification for Supplement is saved.

3.  Click the OK button (Figure 3). The Form Preparation screen displays (Figure 1).

Upload the Justification for Supplement

On the Justification for Supplement screen (Figure 4), click the Transfer File button. The Justification for Supplement File Upload screen displays (Figure 5). See Upload a File for directions.

Figure 4  Justification for Supplement screen. The Transfer File button is circled.

Figure 5  Justification for Supplement File Upload screen.

If a Justification for Supplement has already been uploaded, when you click the Go button for Justification for Supplement on the Form Preparation screen, the Summary of Proposed File Upload screen displays (Figure 6) with these options:

- Display Current Justification for Supplement
- Delete Current Justification for Supplement
- Upload a New Justification for Supplement (This option automatically replaces the already uploaded file.)
FastLane Help

Figure 6  Justification 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

**Figure 1**  Form Preparation screen. The Go button for Other Supplementary Docs is circled.

**Figure 2**  Supplementary Docs screen. The Save Text button is circled.

**Enter Other Supplementary Documents in the Text Box**

1. Type in or copy and paste the Other Supplementary Document in the text box (Figure 2).
2. Click the Save Text button (Figure 2). A screen displays (Figure 3) with the message that the Other Supplementary Document data is saved.

**Figure 3**  Screen with the message that the Other Supplementary Document text has been saved.
4. Click the **OK** button (Figure 2). The **Form Preparation** screen displays.

**Upload Other Supplementary Documents**

1. On the **Other Supplementary Docs** screen (Figure 4), click the **Transfer File** button. The **Other Supplementary Document File Upload** screen displays (Figure 5). See **Upload a File** for directions.

![Figure 4](image1)

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

![Figure 5](image2)

**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.
Supplementary Documents

NEW! File uploads no longer have to be in PDF format!
In addition to PDF files, users can now upload a variety of word processor files and PostScript files. These files will automatically be converted to PDF format.

Follow this link for a list of supported file formats
Follow this link for New Upload Instructions

Note: Clicking on the Display Current Supplementary Docs button will display a PDF document in this window. Once you have reviewed the document, click on the browser's "Back" button to return to this page.

Current documents to display:

Current documents to delete:

Enter the name and location of the file to upload, or click on the Browse button to select the file to upload.

Upload File

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).

![Form Preparation Screen]

**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.

![Screen for entering the proposed additional duration of the award.]

**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
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

Figure 1  FastLane Home Page screen. The Proposals, Awards, and Status link is circled. PIs, Co-PIs, and Other Authorized Users work in this module.

Principal Investigator Functions Introduction

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Figure 1  FastLane Home Page screen. The Proposals, Awards, and Status link is circled. PIs, Co-PIs, and Other Authorized Users work in this module.

Prepare and Update Proposals

In the Proposals, Awards, and Status module, you prepare a proposal and communicate with NSF about it. In pre-award work associated with a proposal, the PI can do the following:

- Create a Letter of Intent
- Prepare a proposal
- Allow or remove SPO/AOR access to a proposal
- Initiate a Proposal File update for a submitted proposal
- Check the status of a proposal
- View the ad hoc and/or panel reviews of a proposal
- Initiate a revised submitted proposal budget

Communicate with NSF on an Awarded Project

Once NSF has granted an award to your project, you can report on your project and communicate with NSF. In post-award work associated with a project, you can do the following:
Manage Participation on a Project

For Proposed Projects

The PI for a project manages the participation of others on a proposal or a project both before and after award.

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 OAU on a project that NSF has awarded. The PI can do the following to manage participation in a project:

- Add or change Co-PIs on a project
- Withdraw a Co-PI from a project
- Assign or change the award PIN to enable an OAU to work on a project report
- Add or delete non-Co-PI Senior Personnel as part of any of the following:
  - Addition of Subaward Request
  - PI Transfer Request
  - Supplemental Funding Request

To enable a Senior Person to work on a project report, communicate to the individual the following:

- Award PIN
- Award Number

Manage Participation on a Project Introduction

For Proposed Projects

Manage Participation for a Proposed Project

The PI coordinates the participation of Co-PIs, Non-Co-PI Senior Personnel, and Other Authorized Users (OAUs) on a project. The PI can do the following to manage participation on a proposal:

- Add a Co-PI to a proposal or remove a Co-PI from a proposal
- Create a proposal PIN to enable an OAU to work on the proposal
FastLane Help

- Add or delete non-Co-PI Senior Personnel as part of a:
  - A Letter of Intent
  - A proposal
  - A Revised Submitted Budget
  - A Proposal File Update

The PI is also responsible for enabling a Senior Person to work on a proposal. To enable a Senior Person to work on a proposal, communicate to the individual the following information:
- Proposal PIN
- Proposal Number

**Add a Co-PI to a Proposal**

Before adding a Co-PI to a proposal, the individual must be registered with NSF as a PI.

You may only add four Co-PIs to a proposal. You may add other individuals to the project as Non-Co-PI Senior Personnel (see Add or Delete Senior Personnel).

Use the General Log In procedure to log in to the system.

1. The Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management screen displays (Figure 1).

   ![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).
**Principal Investigator (PI) Information**

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

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

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

<table>
<thead>
<tr>
<th>Name</th>
<th>Alan Alphaman</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization</td>
<td>National Science Foundation 4102852000</td>
</tr>
<tr>
<td>Department</td>
<td>Information Systems</td>
</tr>
<tr>
<td>Address</td>
<td>4201 Wilson BoulevardO. DIS ESB Arlington, VA 22230</td>
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<tr>
<td>ORCID Identifier</td>
<td></td>
</tr>
<tr>
<td>Serving or ever served on a Federally Funded Project as a PI or Co-PI.</td>
<td>Yes</td>
</tr>
</tbody>
</table>

![Image of PI Information screen with Prepare Proposal button circled](image)

**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).
8. Click the **Go** button for Remainder of the Cover Sheet (Figure 6). The **Remainder of the Cover Sheet** screen displays (Figure 7).

9. Click **Co-PI Information** at the top of the screen (Figure 7). The **Co-Principal Investigator (Co-PI) Information** section displays (Figure 8).
Co-Principal Investigator (Co-PI) Information

NSF proposals can have at most four co-Principal Investigators

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

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

To remove co-PIs, check the 'Remove co-PI' checkbox and then save the remainder of the cover sheet by clicking on the "OK" button at the bottom of this screen.

<table>
<thead>
<tr>
<th>Name</th>
<th>Enter the co-PI's NSF ID (900000000) 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>NSF ID/Email</td>
<td>Enter NSF ID or email address to add a co-PI</td>
</tr>
<tr>
<td>NSF ID/Email</td>
<td>Enter NSF ID or email address to add a co-PI</td>
</tr>
<tr>
<td>NSF ID/Email</td>
<td>Enter NSF ID or email address to add a co-PI</td>
</tr>
<tr>
<td>NSF ID/Email</td>
<td>Enter NSF ID or email address to add a co-PI</td>
</tr>
</tbody>
</table>

Figure 8  Co-Principal Investigator (Co-PI) Information section of the Remainder of the Cover Sheet screen.

10. In the NSF ID/Email box (Figure 8), type the NSF ID or email address of the Co-PI you want to add to the proposal. (Repeat to add up to four Co-PIs to a proposal.)

11. Click the OK button at the bottom of the screen (Figure 9). A screen displays (Figure 10) with confirmation that the Cover Sheet has been saved, including the addition of the Co-PI to the proposal.

Figure 9  Lower portion of the Remainder of the Cover Sheet screen. The OK button is circled.

Your CoverSheet has been saved

OK

Figure 10  Screen with confirmation that the information on the Cover Sheet is saved. This includes the addition of the Co-PI to the proposal.

12. Click the OK button (Figure 10). The Form Preparation screen displays (Figure 5).

Add a Non-Co-PI Senior Person to a Proposal

You may add as many non-Co-PI Senior Personnel as you require to a proposal.

1. On the FastLane Home Page screen (Figure 1), click Proposals, Awards, and Status. The Proposals, Awards, and Status screen displays (Figure 2).
Figure 1  FastLane Home Page screen. The Proposals, Awards, and Status link is circled.
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).
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).
9. Click the **Go** button (Figure 7) for Add/Delete Non-Co-PI Senior Personnel. The **Add/Delete Non-Co-Principal Investigator (Co-PI) Senior Personnel Assigned to Proposal** screen displays (Figure 8).

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

10. In the appropriate boxes, type the individual’s first and last name and middle initial (Figure 8).

11. Click the **Add Non-Co-PI Senior Person to Proposal** button (Figure 8). The **Add/Delete Non-Co-Principal Investigator (Co-PI) Senior Personnel Assigned to Proposal** screen displays (Figure 9) with the individual listed as a Senior Person. The individual is also now listed on the **Budget Personnel** screen (Figure 10) as a Senior Person for whom funds can be allocated.

**Figure 9** Add/Delete Non-Co-Principal Investigator (Co-PI) Senior Personnel Assigned to Proposal screen. The newly added Senior Person’s name now appears in the list of Senior Personnel.
Remove a Co-PI from a Proposal

NSF permits only four Co-PIs per proposal.

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

Figure 1  FastLane Home Page screen. The Proposals, Awards, and Status link is circled.
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).
Figure 5  Principal Investigator (PI) Information screen. The Prepare Proposal button is circled.

6. Click the Prepare Proposal button (Figure 5). The Proposal Actions screen displays (Figure 6).

Figure 6  Proposal Actions screen. The Edit button is circled.

7. Highlight the number of the proposal (Figure 6) that you want to remove a Co-PI from.
8. Click the Edit button (Figure 6). The Form Preparation screen displays (Figure 7).
**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>08/02/16</td>
<td>Project Summary</td>
<td>08/01/16</td>
</tr>
<tr>
<td>Table of Contents</td>
<td>N/A</td>
<td>Project Description</td>
<td>08/01/16</td>
</tr>
<tr>
<td>References Cited</td>
<td></td>
<td>Biographical Sketches</td>
<td>08/01/16</td>
</tr>
<tr>
<td>Budgets (Including Justification)</td>
<td></td>
<td>Current and Pending Support</td>
<td></td>
</tr>
<tr>
<td>Facilities, Equipment, and Other Resources</td>
<td></td>
<td>Project Data Form</td>
<td>08/02/16</td>
</tr>
</tbody>
</table>

**Supplementary Documents**

- Data Management Plan
- Mentoring Plan
- Project Summary with Special Characters
- Other Supplementary Docs
- GOALI – Industrial PI Confirmation Letter
- RAISE – Program Officer Concurrence

**Single Copy Documents**

- Collaborators and Other Affiliations
- Deviation Authorization (if applicable)
- List of Suggested Reviewers (optional)
- Additional Single Copy Documents
- Nature of Natural or Anthropogenic Event

**Form Preparation screen. The Go button for the Cover Sheet is circled.**

9. Click the **Go** button for Cover Sheet (Figure 7). The **Cover Sheet Components Form** screen displays (Figure 8).

**Figure 8**  
**Cover Sheet Components Form screen.**

10. Click the **Go** button for Remainder of the Cover Sheet (Figure 8). The **Remainder of the Cover Sheet**
screen displays (Figure 9).

11. Click Co-PI Information at the top of the screen (Figure 9). The Co-Principal Investigator (Co-PI) Information section displays (Figure 10).

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.
14. Click the OK button (Figure 12). The Form Preparation screen displays (Figure 7).

Remove a Non-Co-PI Senior Person from a Proposal

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

Figure 12 Screen with confirmation that the information on the Cover Sheet is saved.

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).
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 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).

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).

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).
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).

2. On the Proposals, Awards, and Status screen, click to view the proposal that you want to update.

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

4. Click the Proposals, Awards, and Status button (Figure 2).

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

6. Click the Proposals, Awards, and Status button (Figure 2).

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

8. Click the Proposals, Awards, and Status button (Figure 2).

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.
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).

   **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 3](image)
   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](image)
   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](image)
   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).
8. Click the View/Edit Update button (Figure 6). The Form Preparation screen displays (Figure 7).

9. Click the Go button for Cover Sheet (Figure 7). The Cover Sheet Components Form
FastLane Help

screen displays (Figure 8).

Cover Sheet Components Form

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

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

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

Awardee Organization/Primary Place Of Performance Selection

<table>
<thead>
<tr>
<th>Awardee Organization</th>
<th>Primary Place of Performance</th>
</tr>
</thead>
<tbody>
<tr>
<td>National Science Foundation</td>
<td>ProDev</td>
</tr>
</tbody>
</table>

Address

Arlington, VA 222301000

Time Zone

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

Inst. Code

4102852000

DUNS #

074811803

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


NSF Unit Consideration

Current List of selected NSF UNITS:

1. AGS - SOLAR-TERRESTRIAL

*Remainder of the Cover Sheet

Go Back

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

Proposal Title | Budget and Duration | Announcement and Consideration | PI Information

Co-PI Information | Previous NSF Awards | Other Federal Agencies | Awardee Organization

Primary Place of Performance | Other Information | Certification | Authorized Representative

Top of Page | Bottom of Page

Figure 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 (00000000) 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>

Figure 10  Co-Principal Investigator (Co-PI) Information section of the Remainder of the Cover Sheet screen.
Add a Co-PI to a Proposal File Update

1. In the NSF ID/Email box (Figure 10), type the NSF ID or email address of the Co-PI you want to add to the proposal file update. (Repeat for up to four Co-PIs on a proposal.)
2. Click the OK button at the bottom of the screen (Figure 11). A screen displays (Figure 12) with confirmation that the Cover Sheet has been saved, including the addition of the Co-PI to the proposal.

Figure 11  Lower portion of the Remainder of the Cover Sheet screen. The OK button is circled.

Your CoverSheet has been saved

Figure 12  Screen with confirmation that the information on the Cover Sheet is saved. This includes the addition of the Co-PI to the proposal.
Remove a Co-PI from a Proposal File Update

1. In the Co-Principal Investigator (Co-PI) Information section of the Remainder of the Cover Sheet screen (Figure 13), click the check mark box for the Co-PI that you want to remove.
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 (000####) 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>NSF ID/Email</td>
<td>Enter NSF ID or email address to add a co-PI</td>
</tr>
<tr>
<td>NSF ID/Email</td>
<td>Enter NSF ID or email address to add a co-PI</td>
</tr>
<tr>
<td>NSF ID/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](image1.png) Lower portion of the Remainder of the Cover Sheet screen. The OK button is circled.

   ![Figure 15](image2.png) Screen with confirmation that the information on the Cover Sheet is saved.

3. Click the OK button (Figure 12). The Form Preparation screen displays (Figure 7)

   Add or Delete Senior Personnel for a Letter of Intent

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

Figure 2  Proposals, Awards, and Status screen. The PI/Co-PI Log In area is circled.
2. In the PI/Co-PI section (Figure 1), type the following:
   • Your last name
   • Your National Science Foundation Identification (NSF ID) number
   • Your password

3. Click the Log In button (Figure 2). The Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management screen displays (Figure 3).

   ![Figure 3](image1)

   **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 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](image2)

   Figure 4 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Proposal Functions screen. The Letters of Intent link is circled.

5. Click Letters of Intent (Figure 4). The Letters of Intent screen displays on the Create New LOI from Solicitation tab (Figure 5).

   ![Figure 5](image3)

   Figure 5 Letters of Intent screen on the Create New LOI from Program Solicitation tab. The Edit/View LOI tab is circled.
6. Click the **Edit/View LOI** tab (Figure 5). The **Letters of Intent** screen displays on the **Edit/View LOI** tab (Figure 6).

![Figure 6 Letters of Intent screen on the Edit/View LOI tab.]

7. Click **Edit** (Figure 6) on the row for the Letter of Intent that you want to add or delete Senior Personnel for. The **Edit LOI** screen displays (Figure 7).

![Figure 7 Edit LOI screen. The Add/Edit Personnel button is circled.]

8. Click the **Add/Edit Personnel** button at the bottom of the screen (Figure 7). The **Edit LOI—Add/Edit Other Senior Personnel** screen displays (Figure 8), where you can do either or both of the following:
   - **Add a Senior Person**
   - **Delete a Senior Person**

![Figure 8 Edit LOI—Add/Edit Other Senior Personnel screen. The Add to List button is circled.]

**Add a Senior Person**

1. To add a Senior Person, type the following on the **Edit LOI—Add/Edit Other Senior Personnel** screen (Figure 8):
   - In the **First Name** box, type the individual’s first name.
   - In the **Middle Initial** box, type the individual’s middle initial (optional).
   - In the **Last Name** box, type the individual’s last name.
   - In the **Organization Name** box, type the name of the organization registered with NSF.
   - In the **Department** box, type the individual’s research department.
   - In the **City** box, type the individual’s city.
   - In the **State** box, type the individual’s state (optional).
   - In the **Country** box, select the country from the drop-down list.

2. Click the **Add to List** button (Figure 8). The **Edit LOI—Add/Edit Other Senior Personnel** screen displays (Figure 9) with the individual’s name now listed in the **Existing Personnel** section.
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.
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

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).
8. Click the **View/Edit Update** button (Figure 6). The **Form Preparation** screen displays (Figure 7).

**Figure 6**    Proposal Update Control screen. The View/Edit Update button is circled.

**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.

**Delete a Senior Person**

1. On the Add/Delete Non-Co-Principal Investigator (Co-PI) Senior Personnel Assigned to Proposal screen (Figure 11), highlight the name of the Senior Person that you want to remove.

**Figure 11** Add/Delete Non-Co-Principal Investigator (Co-PI) Senior Personnel Assigned to Proposal screen. The Delete Non-Co-PI Senior Person from Proposal button is circled.

2. Click the Delete Non-Co-PI Senior Personnel from Proposal button (Figure 10). A screen displays (Figure 12) with a message for you to confirm that you want to remove the Senior Person.

**Figure 11** Screen with a message for you to confirm that you want to remove the Senior Person.

3. Click the OK button (Figure 12). A screen displays (Figure 13) confirming that the Senior Person has been removed.
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).
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).

**Figure 4** **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Proposal Functions screen. The Revise Submitted Proposal Budget link is circled.**

5. Click **Revise Submitted Proposal Budget** (Figure 4). The **List of Proposals** screen displays (Figure 5).

**Figure 5** **List of Proposal screen. The View button is circled.**

6. Highlight the proposal for which you want to add or delete a Senior Person (Figure 5).
7. Click the **View** button (Figure 5). The **Proposal Revised Budget** screen displays (Figure 6).

**Figure 6** **Proposal Revised Budget screen. The radio button for Add/Delete Senior Personnel and the OK button are circled.**

8. Click the radio button (Figure 7) for Add/Delete Non-Co-PI Senior Personnel.
9. Click the **OK** button (Figure 7). The **Add/Delete Non-Co-Principal Investigator (Co-PI) Senior Personnel Assigned to Proposal** screen displays (Figure 8). On this screen you can do either one or both of the following:
   - **Add a Senior Person**
   - **Delete a Senior Person**

**Figure 7** **Add/Delete Non-Co-Principal Investigator (Co-PI) Senior Personnel Assigned to Proposal screen. The Add Non-Co-PI Senior Person to Proposal button is circled.**

   **Add a Senior Person**

1. On the **Add/Delete Non-Co-Principal Investigator (Co-PI) Senior Personnel Assigned to Proposal** screen (Figure 7), type the individual’s first and last name and middle initial in the appropriate boxes.
2. Click the **Add Non-Co-PI Senior Person to Proposal** button (Figure 7). The **Add/Delete Non-Co-Principal Investigator (Co-PI) Senior Personnel Assigned to Proposal** screen displays (Figure 8) with the individual listed as a Senior Person. The individual is also now listed on the **Budget Personnel** screen (Figure 9) as a Senior Person for whom funds may be allocated.

**Figure 8** **Add/Delete Non-Co-Principal Investigator (Co-PI) Senior Personnel Assigned to Proposal screen. The newly added Senior Person now appears in the List of Senior Personnel.**
FastLane Help

Figure 9  Budget Personnel screen. The name of the newly added Senior Person is listed for addition if necessary as a person for whom funds may be allocated.

Delete a Senior Person

1. On the Add/Delete Non-Co-Principal Investigator (Co-PI) Senior Personnel Assigned to Proposal screen (Figure 10), highlight the name of the Senior Person that you want to remove.

Figure 10  Add/Delete Non-Co-Principal Investigator (Co-PI) Senior Personnel Assigned to Proposal screen. The Delete Non-Co-PI Senior Person from Proposal button is circled.

2. Click the Delete Non-Co-PI Senior Personnel from Proposal button (Figure 10). A screen displays (Figure 11) with a message for you to confirm that you want to remove the Senior Person.

Figure 11  Screen with a message for you to confirm that you want to remove the Senior Person.

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

All data for Thomas Jackman deleted from proposal 9007744

Figure 12  Screen with the message that the Senior Person has been removed.

Create a Proposal PIN

To enable an Other Authorized User (OAU) to work on a proposal, you must create a Proposal PIN and give this PIN to the OAU. The OAU needs the PIN to log into Proposals, Awards, and Status to work on the proposal, a proposal update, or a revised submitted budget.

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

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

**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).

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

**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**

The PI coordinates the participation of Co-PIs, Non-Co-PI Senior Personnel, and OAUs on a project that NSF has awarded. The PI can do the following to manage participation in an awarded project:

- Add or change Co-PIs on a project
- Withdraw a Co-PI from a project
- Assign or change the award PIN to enable an OAU to work on a project report
- Add or delete non-Co-PI Senior Personnel as part of an:
  - Addition of Subaward Request
  - PI Transfer Request
  - Supplemental Funding Request

To enable a Senior Person to work on a project report, communicate to the individual the following:
- Award PIN
- Award Number

**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).
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 4 Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management screen. The Notifications and Requests link is circled.

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

Figure 5 Notifications and Requests screen. The link to an Addition of Subaward link is circled.

6. Find the Addition of Subaward Request in the Works in Progress section (Figure 5).
7. Click Addition of Subaward (Figure 5) in the row for the Addition of Subaward for which you want to add or delete a Senior Person. The Form Preparation screen displays (Figure 6).
Subawarding, Transferring or Contracting Out Part of an NSF Award

Figure 6 Addition of Subaward Form Preparation screen. The Go button for Add/Delete Senior Personnel (other than PI/Co-PI) is circled.

8. Click the Go button (Figure 6) for Add/Delete Non-Co-Principal Investigator (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.

Figure 10  Add/Delete Non-Co-Principal Investigator (Co-PI) Senior Personnel Assigned to Proposal screen. The Delete Non-Co-PI Senior Person from Proposal button is circled.

2. Click the Delete Non-Co-PI Senior Personnel from Proposal button (Figure 10). A screen displays (Figure 11) with a message for you to confirm that you want to remove the Senior Person.

Figure 11  Screen with a message for you to confirm that you want to remove the Senior Person.

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

![Screen with message](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).
8. Click **Edit Transfer Request Forms** (Figure 7). The **Form Preparation** screen displays (Figure 8).

![Form Preparation screen](image-url)

**Figure 7** Click on a Link to Work screen. The Edit Transfer Request Forms link 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

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

**Figure 8** Form Preparation screen. The Go button for Add/Delete Non Co-PI Senior Personnel is circled.

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.

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

**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.
FastLane Help

**Figure 11** Budget Personnel screen. The name of the newly added Senior Person is listed for addition if necessary as a person for whom funds are to be allocated.

**Delete a Senior Person**

1. On the Add/Delete Non-Co-Principal Investigator (Co-PI) Senior Personnel Assigned to Proposal screen (Figure 12), highlight the name of the Senior Person that you want to remove.

   **Figure 12** Add/Delete Non-Co-Principal Investigator (Co-PI) Senior Personnel Assigned to Proposal screen. The Delete Non-Co-PI Senior Person from Proposal button is circled.

2. Click the Delete Non-Co-PI Senior Personnel from Proposal button (Figure 12). A screen displays (Figure 13) with a message for you to confirm that you want to remove the Senior Person.

   **Figure 13** Screen with a message for you to confirm that you want to remove the Senior Person.

3. Click the OK button (Figure 13). A screen displays (Figure 14) confirming that the Senior Person has been removed from the proposal.

   **Figure 14** Screen with the message that the Senior Person has been removed.

**Add or Delete Senior Personnel for a Supplementary Funding Request**

1. On the FastLane Home Page screen (Figure 1), click Proposals, Awards, and Status. The Proposals, Awards, and Status screen displays (Figure 2).
Figure 1  FastLane Home Page screen. The Proposals, Awards, and Status link is circled.
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).
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 3](image_url)

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](image_url)

Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Award and Reporting Functions screen. The Supplemental Funding Request link is circled.

5. Click Supplemental Funding Request (Figure 4). The List of Current Awards screen displays (Figure 5).

![Figure 5](image_url)

List of Current Awards screen. The Prepare Supplemental Funding Request button is circled.
6. Highlight the award that the Supplemental Funding Request is for (Figure 5).
7. Click the Prepare Supplemental Funding Request button (Figure 5). The Request for Supplemental Funding screen displays (Figure 6).

![Request for Supplemental Funding](image)

**Figure 6** Request for Supplemental Funding screen. The Edit button is circled.

8. Highlight the Supplemental Funding Request that you want to add or delete a Senior Person for (Figure 6).
9. Click the Edit button (Figure 6). The Form Preparation screen displays (Figure 7).

![Form Preparation](image)

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

10. Click the Add/Delete Non-Co-PI Senior Personnel button (Figure 7). The Add/Delete Non-Co-Principal Investigator (Co-PI) Senior Personnel Assigned to Proposal screen displays (Figure 8). On this screen you can do either one or both of the following:
   - Add a Senior Person
   - Delete a Senior Person
Figure 8    Add/Delete Non-Co-Principal Investigator (Co-PI) Senior Personnel Assigned to Proposal screen.

Add a Senior Person

1. On the Add/Delete Non-Co-Principal Investigator (Co-PI) Senior Personnel Assigned to Proposal screen (Figure 8), type the individual’s first and last name and middle initial in the appropriate boxes.

2. Click the Add Non-Co-PI Senior Person to Proposal button (Figure 8). The Add/Delete Non-Co-Principal Investigator (Co-PI) Senior Personnel Assigned to Proposal screen displays (Figure 9) with the individual listed as a Senior Person.

Figure 9    Add/Delete Non-Co-Principal Investigator (Co-PI) Senior Personnel Assigned to Proposal screen. The individual’s name now displays as a Senior Person.

Delete a Senior Person
1. On the **Add/Delete Non-Co-Principal Investigator (Co-PI) Senior Personnel Assigned to Proposal** screen (Figure 10), highlight the name of the Senior Person that you want to remove.

![Add/Delete Non Co-Principal Investigator (Co-PI) Senior Personnel Assigned to Proposal](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 the message for you to confirm that you want to delete the Senior Person](image)

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

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

![All data for Alan Alphaman deleted from proposal 6480881](image)
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
- 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).
2. Click Change PI Demographic Information (Figure 1). The Principal Investigator (PI) Information screen displays (Figure 2).

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.
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

Figure 7  Edit Principal Investigator’s (PI) Demographic Information screen.
The following elements should be considered in the review for both criteria:

1. What is the potential for the proposed activity to:
   a. advance knowledge and understanding within its own field or across different fields (Intellectual Merit); and
   b. benefit society or advance desired societal outcomes (Broader Impacts)?

2. To what extent do the proposed activities suggest and explore creative, original, or potentially transformative concepts?

3. Is the plan for carrying out the proposed activities well-reasoned, well-organized, and based on a sound rationale? Does the plan incorporate a mechanism to assess success?

4. How well qualified is the individual, team, or institution to conduct the proposed activities?

5. Are there adequate resources available to the PI (either at the home institution or through collaborations) to carry out the proposed activities?

   • Comment in detail on the quality of the proposal with respect to any additional solicitation-specific criteria, if applicable.

   • Provide a summary statement that describes your overall assessment of the proposal based on the review criteria.

The Proposal Review Form also asks you to do the following:

• Indicate any potential conflicts of interest that you might have in evaluating the proposal (optional if no conflict of interest exists).

• Recommend any other qualified reviewers for this proposal (optional).

See Note to Reviewers of Career Proposals if you are reviewing a proposal for the NSF Careers Program.

As of reviewer, you are obligated to maintain the confidentiality of both the proposal you are reviewing and also your review.

To begin preparing a review, see Log In to Proposal Review and Prepare a Proposal Review.

Thank you for your help in evaluating a proposal. Reviews are important to NSF’s evaluation of proposals and provide important feedback to the Principal Investigators. We appreciate the time and thought that go into preparing them.
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
   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?

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4. How well qualified is the individual, team, or institution to conduct the proposed activities?

5. Are there adequate resources available to the PI (either at the home institution or through collaborations) to carry out the proposed activities?

**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
- Have NSF print and mail the proposal to you
- Have NSF make and mail a CD of the proposal to you
- Edit your information on file with NSF
- Add to or update your demographic information

### Proposal Review

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<tbody>
<tr>
<td><strong>Name</strong></td>
<td>Professor Brian Gleeson</td>
</tr>
<tr>
<td><strong>Address</strong></td>
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**Figure 3**  Proposal Review screen, Reviewer and Proposal Information section (upper portion of the screen).
### Merit Review Criteria

| Notice: Effective January 2013, the National Science Foundation implemented revised merit review criteria. While the two merit review criteria are unchanged (Intellectual Merit and Broader Impacts), guidance has been provided to clarify and improve the function of the criteria. |

Please provide detailed comments on the quality of this proposal with respect to each of the two NSF Merit Review Criteria identified below, noting specifically the proposal’s strengths and weaknesses. Both criteria are to be given full consideration during the review and decision-making processes; each criterion is necessary but not sufficient by itself. Please provide comments with respect to any additional solicitation-specific review criteria, if applicable. Also, please enter a summary statement that describes your overall assessment of the proposal based on the review criteria.

When evaluating NSF proposals, reviewers should consider what the proposers want to do, why they want to do it, how they plan to do it, how they will know if they succeed, and what benefits could accrue if the project is successful. These issues apply both to the technical aspects of the proposal and the way in which the project may make broader contributions. To that end, reviewers are asked to evaluate all proposals against two criteria:

1. **Intellectual Merit**: The intellectual merit criterion encompasses the potential to advance knowledge, and
2. **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 an exploration of creative, original, or potentially transformative concepts?
3. Is the plan to carry 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.**

#### 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.
Proposal Review Functions:

- **Prepare Review**
- **View Proposal**
- **Download / Save Proposal**
- **Print Proposal at NSF and Mail**
- **Create CD at NSF and Mail**

Log In to Proposal Review

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<td><strong>Name</strong></td>
<td>0456629</td>
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<tr>
<td>Professor Brian Gleeson</td>
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<tr>
<td><strong>Address</strong></td>
<td>The Effect of Hydrogen and Water Vapor on the Oxidation of Chromia-Forming Alloys</td>
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<td>Jeffrey W Ferguson</td>
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<td>Auburn University</td>
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<tr>
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<td>(222) 333-4444</td>
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### Demographic Information

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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.

| Proposal Review Functions: |  
|---------------------------|---|
| Prepare Review            | View Proposal |
| Download / Save Proposal  | Print Proposal at NSF and Mail |
|                           | Create CD at NSF and Mail |

Figure 8  Proposal Review Functions section of the Proposal Review screen.

Prepare a Proposal Review

1. Access the Proposal Review screen (Figure 1) (see Log In to Proposal Review).
Proposition Review Functions:

- Prepare Review
- View Proposal
- Download / Save Proposal
- Print Proposal at NSF and Mail
- Create CD at NSF and Mail

Figure 1 Lower portion of the Proposal Review screen. The Prepare Review link is circled.

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

Figure 2 Merit Review Criteria screen.

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

4. In the Work in Progress section (Figure 3), type your email address.
5. If you want a copy of the review emailed to you, click the radio button under the eMail box.
6. In the Rating Section (Figure 3), click the radio button for one of the three options.
7. If you agreed to rate the proposal, in the Overall Rating section (Figure 3), click the radio button for one of the ratings.
8. In the first text box of the Overall Rating section (Figure 3), type your evaluation of the proposal with respect to intellectual merit.
9. In the second text box of the Overall Rating section (Figure 3), 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](image1.png) Lower portion of Proposal Review Form screen. The Submit Review button is circled.

![Figure 5](image2.png) Receipt of Proposal Review screen. The Return button is circled.

2. Click Return (Figure 5). The Proposal Review Log In screen displays.
Save the Proposal Review

1. On the lower portion of the Proposal Review Form screen (Figure 6), click the Save Review button. The Proposal Review Saved screen displays (Figure 7).

Figure 6  Lower portion of Proposal Review Form screen. The Save Review button is circled.

Figure 7  Proposal Review Saved screen with a message that your proposal review has been saved.

2. Click the Return button (Figure 7). The Proposal Review screen displays (Figure 1). To work on the Proposal Review again, see Access a Saved Proposal Review.

Access a Saved Proposal Review

1. Access the Proposal Review screen (Figure 1) (see Log In to Proposal Review).

Figure 1  Lower portion of the Proposal Review screen. The Prepare Review link is circled.

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

3. Click the Continue button at the bottom of the Merit Review Criteria screen. The Proposal Review Form screen displays (Figure 3) as you had saved it. To edit the review, see Prepare a Proposal Review, Step 4 through Step 12. To submit the review, see Submit a Review.
Edit Your Information with NSF

1. Access the Proposal Review screen (Figure 1) (see Log In to Proposal Review).
Proposal Review

Figure 1  Top portion of the Proposal Review screen. The Edit button is circled.

2. On the Proposal Review screen (Figure 1), click the Edit button. The Reviewer’s Information screen displays (Figure 2).
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:  

Save  Go Back

Figure 2  Reviewer's Information screen. The Save button is circled.

3. Change the information as you require (Figure 2).
4. Click the Save button (Figure 2). A screen displays (Figure 3) with the message that your information, as changed, has been saved.
Figure 3  Screen with the message that the changed information has been saved.

Update Your Demographic Information

See Demographic Information: What and Why? and the Privacy Act and Public Burden Statements for an explanation of the categories of demographic information and how NSF uses this information.

All categories are optional.

1. Access the Proposal Review screen (Figure 1) (see Log In to Proposal Review).

   Proposal Review

<table>
<thead>
<tr>
<th>Reviewer Information</th>
<th>Proposal Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Professor Brian Gleeson</td>
</tr>
<tr>
<td>Address</td>
<td>444 Wilson Boulevard, Arlington, VA 22222</td>
</tr>
<tr>
<td>E-Mail</td>
<td><a href="mailto:name@nsf.gov">name@nsf.gov</a></td>
</tr>
<tr>
<td>Office Phone</td>
<td>(222) 333-4444</td>
</tr>
</tbody>
</table>

   | Proposal Number | 0456629 |
   | Title           | The Effect of Hydrogen and Water Vapor on the Oxidation of Chromia-Forming Alloys |
   | Principal Investigator's Name | Jeffrey W Fergus |
   | Institution     | Auburn University |

   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).
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.

![Demographic Information](image)

**Figure 2** Please Add/Update Your Demographic Information screen. The Save button is circled.

5. Click the **Continue** button (Figure 3). The **Proposal Review** screen displays (Figure 1).
FastLane Help

**View a Proposal**

1. Access the **Proposal Review** screen (Figure 1) (see Log in to Proposal Review).

![Proposal Review Functions]

   - **Prepare Review**
   - **View Proposal**
   - **Download / Save Proposal**
   - **Print Proposal at NSF and Mail**
   - **Create CD at NSF and Mail**

![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**

![View / Print Proposal]

   Please click on the radio button next to the form that you want to view / print. Then press the "View" button at the bottom of the page. Please be patient, it may take a minute to process all of the data. You must have the Adobe Acrobat Reader installed on your computer in order to view / print these forms in PDF format. If you do not have the Reader installed, refer to Using Adobe Acrobat Viewer for Printing for information on locating and installing the Reader. If you encounter an error occurred while trying to use this document message after selecting a form or the "View Entire Proposal" option and clicking on the "View" button, please read Common Printing Problems.
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.

![Proposal in PDF format. The Print icon is circled.](image)

View a Section of the Proposal

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.
**FastLane Help**

**View/Print Proposal**

Please click on the radio button next to the form that you want to view/print. Then press the "View" button at the bottom of the page. Please be patient, it may take a minute to process all of the data. You must have the Adobe Acrobat Reader installed on your computer in order to view/print these forms in PDF format. If you do not have the Reader installed, refer to Using Adobe Acrobat Viewer for Printing for information on locating and installing the Reader. If you encounter "an error occurred while trying to use this document" message after selecting a form or the "View Entire Proposal" option and clicking on the "View" button, please read Common Printing Problems.

**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).

![Proposal Review Functions]

- Prepare Review
- View Proposal
- Download / Save Proposal
- Print Proposal at NSF and Mail
- Create CD at NSF and Mail

Figure 1     Lower portion of the Proposal Review screen. The Download/Save Proposal link is circled.

2. On the Proposal Review screen (Figure 1), click Download/Save Proposal. The Download File window displays (Figure 2).
3. Click the **Save** button (Figure 2). The **Save As** window displays (Figure 3).
4. In the File Name box (Figure 3), give the proposal a title and select the section of your computer you want to save it to.
5. Click the Save button (Figure 3). The proposal downloads to your computer as a PDF file. After completion of the download, the Proposal Review screen displays (Figure 1).

**Print Proposal at NSF and Mail**

**Print Proposal at NSF and Mail**

1. Access the Proposal Review screen (Figure 1) (see Log In to Proposal Review).

<table>
<thead>
<tr>
<th>Proposal Review Functions:</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ Prepare Review</td>
</tr>
<tr>
<td>☐ Download / Save Proposal</td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>

Figure 1  Lower portion of the Proposal Review screen. The Print Proposal at NSF and Mail link is circled.

2. Click Print Proposal at NSF and Mail (Figure 1). The Print on Demand Submit Request screen displays
FastLane Help

(Figure 2).

Figure 2  
Print on Demand Submit Request screen. The Submit Request button is circled.

3. In the Reviewer Name section (Figure 2), check to see that your name and address as displayed are correct. If it is incorrect, update your information.
4. If you want NSF to send the proposal to a different address than the one displayed in the Reviewer Name section, type the new address in the boxes provided.
5. Click Submit Request button (Figure 2). The Proposal Print Request screen displays (Figure 3) with your address and the message that the request has been submitted.

Figure 3  
Proposal Print Request screen. The Return to Proposal Review button is circled.

6. Click Return to Proposal Review (Figure 3). The Proposal Review screen displays (Figure 1).

Print Proposal at NSF and Mail

1. Access the Proposal Review screen (Figure 1) (see Log In to Proposal Review).

<table>
<thead>
<tr>
<th>Proposal Review Functions:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prepare Review</td>
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<tr>
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</tr>
<tr>
<td>Print Proposal at NSF and Mail</td>
</tr>
<tr>
<td>Create CD at NSF and Mail</td>
</tr>
</tbody>
</table>

Figure 1  
Lower portion of the Proposal Review screen. The Print Proposal at NSF and Mail link is circled.

2. Click Print Proposal at NSF and Mail (Figure 1). The Print on Demand Submit Request screen displays (Figure 2).

Figure 2  
Print on Demand Submit Request screen. The Submit Request button is circled.

3. In the Reviewer Name section (Figure 2), check to see that your name and address as displayed are correct. If it is incorrect, update your information.
4. If you want NSF to send the proposal to a different address than the one displayed in the Reviewer Name section, type the new address in the boxes provided.
5. Click Submit Request button (Figure 2). The Proposal Print Request screen displays (Figure 3) with your address and the message that the request has been submitted.

Figure 3  
Proposal Print Request screen. The Return to Proposal Review button is circled.

6. Click Return to Proposal Review (Figure 3). The Proposal Review screen displays (Figure 1).

Update Information for Printing at NSF

1. Access the Print on Demand Submit Request screen (Figure 1) (see Print at NSF and Mail, Step 1 and Step 2).
2. In the **Reviewer Name** section of the **Print on Demand Submit Request** screen (Figure 1), click **Update Reviewer Information**. The **Reviewer's Information** screen displays (Figure 2).
Figure 2  Reviewer's Information screen. The Save button is circled.

3. Change the information as you require (Figure 2).
4. Click the Save button (Figure 2). A screen displays with the message that your information has been saved (Figure 3).

Figure 3  Screen with the message that your information has been saved.

5. Click the Continue button (Figure 3). The Print on Demand Submit Request screen displays (Figure 1).

Create CD at NSF and Mail

Create a CD at NSF and Mail

1. Access the Proposal Review screen (Figure 1) (see Log In to Proposal Review).

Figure 1  Lower portion of the Proposal Review screen. The Create CD at NSF and Mail link is circled.

2. On the Proposal Review screen (Figure 1), click Create CD at NSF and Mail. The CD on Demand Submit Request screen displays (Figure 2).
3. In the Reviewer Name section (Figure 2), check to see that your name and address as displayed are correct. If they are incorrect, update your information.

4. If you want NSF to send the proposal to a different address than the one displayed in the Reviewer Name section, type the new address in the boxes provided (Figure 2).

5. Click the Submit Request button (Figure 2). The CD on Demand Submit Request Confirmation screen displays (Figure 3) with your address and the message that the request has been submitted.
7. Click the Continue button (Figure 3). A screen displays with the message that the request is submitted.

**Create a CD at NSF and Mail**

1. Access the Proposal Review screen (Figure 1) (see Log In to Proposal Review).

2. On the Proposal Review screen (Figure 1), click Create CD at NSF and Mail. The CD on Demand Submit Request screen displays (Figure 2).
3. In the **Reviewer Name** section (Figure 2), check to see that your name and address as displayed are correct. If they are incorrect, **update your information**.

4. If you want NSF to send the proposal to a different address than the one displayed in the **Reviewer Name** section, type the new address in the boxes provided (Figure 2).

5. Click the **Submit Request** button (Figure 2). The **CD on Demand Submit Request Confirmation** screen displays (Figure 3) with your address and the message that the request has been submitted.
Figure 3   CD on Demand Submit Request Confirmation screen. The Continue button is circled.

7. Click the Continue button (Figure 3). A screen displays with the message that the request is submitted.

Update Personal Information for CD on Demand

1. Access the CD on Demand Submit Request screen (Figure 1) (see Create a CD at NSF and Mail, Steps 1 and 2).

Figure 1   CD on Demand Submit Request screen. The Update Reviewer Information button is circled.

2. On the CD on Demand Submit Request screen (Figure 1), click the Update Reviewer Information button. The Reviewer’s Information screen displays (Figure 2).
3. Change the information as you require (Figure 2).
4. Click the Save button (Figure 2). A screen displays with the message that your information has been saved (Figure 3).
SPO Functions
Sponsored Project Office Functions Introduction

Print the contents of the SPO Functions book.

The Sponsored Project Office (SPO) representative potentially has many diverse functions. All these functions are accessed through Research Administration (see Log in to SPO Functions).

The functions you are able to carry out as an SPO depend upon the permissions that you have as a user. When you log in to Research Administration, on the Research Administration screen (Figure 1), you will have access only to those SPO functions for which you have permission.

Note: If you have permission as a Financial User, to carry out financial functions, click the Financial Functions link on the FastLane Home Page screen.)

Figure 1  Research Administration screen. This individual has user permissions for all functions carried out in Research Administration.

If you do not have permissions for a function, that function does not display when you access the Research Administration screen. Here is a table that maps user permissions to user functions.

<table>
<thead>
<tr>
<th>User Permission Granted</th>
<th>Function Listed on Research Administration Screen</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add, Modify, and Delete</td>
<td></td>
</tr>
<tr>
<td>FastLane Users</td>
<td>Accounts Management</td>
</tr>
<tr>
<td>Change User Permissions</td>
<td></td>
</tr>
</tbody>
</table>
## Initialize User Passwords

(Within accounts management, you have access only to those functions for which you have permission.)

## Financial Administrator

| View Only | • Organizational Reports  
|           | • View/Print Organization’s Award Letters |

## Sponsored Projects Officer

| • Organizational Reports  
| • View/Print Organization's Award Notices  
| • View/Edit Notifications To or Requests For NSF Approvals Under Grants  
| • View/Edit Proposals/Supplements/File Updates/Withdrawals  
| • View/Edit Revised Budgets |

## Authorized Organizational Representative

| • Organizational Reports  
| • View/Print Organization's Award Notices  
| • View Project Reports  
| • View/Edit Notifications To or Requests For NSF Approvals Under Grants  
| • View/Edit Proposals/Supplements/Withdrawals  
| • View/Edit/Submit Revised Budgets  
| • Authorized Organizational Representative Functions |

Click on a link below for instructions for that SPO function:

- Accounts Management
- Letters of Intent
- Proposals/Supplements/File Updates/Withdrawals:
  - Work on and submit proposals
  - Withdraw a proposal
  - View and print a submitted proposal
  - Check the status of a proposal
  - Supplementary Funding Requests
  - Proposal File Updates
- Award Documents
- Check Continuation Funding Status
- Forwarded/Submitted Revised Budgets
- Notifications and Requests
- Organizational Reports
- Authorized Organizational Representative Functions

---

## Log In to SPO Functions in Research Administration

1. On the [FastLane Home Page](#) screen (Figure 1), click **Research Administration**. The **Research Administration Login** screen displays (Figure 2).
FastLane Help

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

Figure 2  Research Administration Login screen. The Login box, the radio button for Research Administration, and the Login button are circled.

2. In the Login section (Figure 2), 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.
1. On the Accounts Management screen (Figure 1), click the Organization Information tab. The Revise Information screen displays (Figure 2).

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

2. On the Accounts Management screen on the User Account tab (Figure 1), click the Organization Information tab. The Revise Information screen displays (Figure 2).

Figure 2  
Revise Information screen. The Request Change of Organization Name link is circled.

3. Click Request Change of Organization Name (Figure 2). The Request Change of Organization Name screen displays (Figure 3).
FastLane Help

Figure 3  Request Change of Organization Name screen. The Submit Request button is circled.

4. In the **New Name of Organization** box (Figure 3), type the new name.
5. In the **Short Name** box (Figure 3), type the short name of the organization (optional).
6. In the **Award Letter Email Address** (Figure 3), type the email address of the individual who receives award letters.
7. In the **Recipient Name** box (Figure 3), write the name of the email recipient (optional).
8. In the **Additional Comments** box (Figure 3), type or copy and paste any additional information that you want to convey on the organization’s name change.
9. Click the **Submit Request** button (Figure 3). The **Confirmation** screen displays (Figure 4) with the message that your organization name change has been submitted to NSF.

Figure 4  Confirmation screen. The Account Management link is circled.

10. Click **Account Management Main** (Figure 4). The **Accounts Management** screen displays on the **User Account** tab.

    **Check the Status of an Organization Name Change**

1. Access the **Accounts Management** screen on the **User Account** tab (Figure 1) (see **Access Accounts Management**).
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).
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).

4. Once the necessary information for one to three Financial Representatives has been filled out click the Submit button (Figure 2).

Organizational Reports

Organizational Reports Introduction
In Organizational Reports, you can view basic information about the activity of your organization with NSF.

In Organizational Reports, you can view the following:

- **Recent proposals**
  Search for proposals and check their status
- **Active awards**
  Search for awards with the option to view the abstract for an award
- **Continuing Grant Increments**
  Check continuation funding status
- **Organizational Permissions Report**
  View the permissions for your organization’s users
  (Click on a link above for the instructions for that option.)

See [Access Organizational Reports](#) for instructions to begin working on Organizational Reports.

### Access Organizational Reports

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

![Research Administration Screen](#)

**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:
   - Recent Proposals
   - Active Awards
   - Continuing Grant Increments
   - Organizational Permissions Report
   (Click on a link above for instructions for that option.)

**View Recent Proposals Reports**

1. Access the **Organizational Reports** screen (Figure 1) (see [Access Organizational Reports](#)).
2. On the Organizational Reports screen (Figure 1), click the radio button for Recent Proposals.
3. Click the Continue button (Figure 1). The Recent Proposals screen displays (Figure 2).

4. In the Search for Recent Proposals section (Figure 2), search for proposals by any of these criteria:
   - Status
     Click a radio button for a status criterion.
• **Date of most recent status change**
  Type the date of the latest status change (in mm/dd/yyyy format).

• **Proposal number**
  Type the proposal number.

• **PI's last name**
  Type the last name of a PI.

5. In the **Sort Results By** section (Figure 2), click a radio button for one of the sort criteria.
6. Click the **Continue** button (Figure 2). The **Recent Proposals Search Results** screen displays (Figure 3) with a listing of recent proposals.

![Recent Proposals Search Results](image)

**Figure 3** Recent Proposals Search Results screen. The proposal number is circled for a proposal.

7. To see detailed information on a proposal, select the proposal number (Figure 3) on the row for the proposal whose information you want to see. The **Proposal Information** screen displays (Figure 4) with the information.

![Proposal Information](image)

**Figure 4** Proposal Information screen.

**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).

4. In the Search for Awards section (Figure 2), search for active awards by any of the following criteria:
   • Date range
     – In the From box, enter the beginning date for the range (in mm/dd/yyyy format).
FastLane Help

- In the To box, enter the ending date for the range (in mm/dd/yyyy format).
- **Award number**
  - In the Award number box, type the award number.
- **Status change**
  - In the **Status Change Occurring Anytime After this Date** box, type the date after which the status change occurred (in mm/dd/yyyy format).

5. In the **Sort Results By** section (Figure 2), click the radio button for one of the sorting criteria:
   - **Award End Date**
   - **Award Number**

6. Select the **Continue** button (Figure 2). The **Active Awards Search Results** screen displays (Figure 3) with a listing of the active awards that match your search criteria.

![Figure 3 Active Awards Search Results screen. An award number is circled for an active award.](image)

7. Select a column heading (Figure 3) to view the active awards ordered by that category.
8. To view the abstract for an active award, select the award number (Figure 3) on the row for the active award whose abstract you want to view. The **NSF Award Abstract** screen displays (Figure 4) with the award abstract.

![Figure 4 NSF Award Abstract screen.](image)

**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).

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.
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**

**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.

**View Users for Selected Permissions**

1. On the **Organization Permissions Report** screen (Figure 4), from the **Select Permissions** list (Figure 4), highlight the permissions for which you want to see the users.
Figure 4  Organization Permissions Report screen. All Users and the Authorized Organizational Representative Functions permission are highlighted. The Continue button is circled.

2. From the Select Users list (Figure 4), highlight All Users.
3. Click the Continue button (Figure 4). The User Permissions Search Results screen displays (Figure 5) showing the users for the highlighted permission.

Figure 5  Organization Permissions Search Results screen listing all users who have the Authorized Organizational Representative Functions permission.

View All Permissions for All Users

1. On the Organization Permissions Report screen (Figure 6), from the Select Permissions list (Figure 6), highlight All Permissions.
Figure 6  Organization Permissions Report screen. All Users and All Permissions are highlighted. The Continue button is circled.

2. From the Select Users list (Figure 6), highlight All Users.
3. Click the Continue button (Figure 6). The User Permissions Search Results screen displays (Figure 7) showing the permissions for all users, who are listed in alphabetical order.

Figure 7  User Permissions Search Results screen with a listing of all users in alphabetical order and with the permissions listed for each user.

AOR Functions
Authorized Organizational Representative Functions

Introduction
What Is an Authorized Organizational Representative?

Print the contents of the AOR Functions book.

The Authorized Organizational Representative (AOR) is an individual authorized by an organization to do the following:

- Sign a notification, a request, a proposal, or other document at the time of submission to NSF.
- Provide the required certifications for the signed document (the certifications display as part of the signature process).
Electronic signature by an individual with AOR permissions through FastLane is the only way to sign and submit a proposal, notification, or request. You no longer need to send to NSF any signed letters through the post.

See AOR Login for instructions to begin working on AOR functions.

How You Become an AOR

To be an AOR, 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).

![Authorized Organizational Representative Functions screen. The Account Management link is circled.](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).

![Account Management screen. The Search button is circled.](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.
Figure 3  Accounts Management screen. The Modify link is circled.

6. Click **Modify** on the row for your name (Figure 3). The **Modify User Profile** screen displays (Figure 4).
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 4   Modify User Profile screen. The Modify User 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).
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 8*  
Research Administration screen. The **Authorized Organizational Representative Functions** link is circled.

*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](http://www.adobe.com/reader).
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.
The **Panelist Functions** screen displays (Figure 2).

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

---

**Figure 2**  Panelist Functions screen. The Log In section is circled.

2. In the **Log In** section on the **Panelist Functions** screen (Figure 2), do the following:
   - In the **Panel ID** box, type the Panel ID that you received from NSF.
   - In the **Panelist Last Name** box, type your last name.
   - In the **Password** box, type the password that you received from NSF.

3. Select the **Login** button (Figure 2). The **Panelist System Selection** screen displays (Figure 3 through 8), where you have the option to work on any of these systems:
   - **Travel and Reimbursement System**
   - **Meeting Sign-In**
   - **Panel Review System**
   - **Interactive Panel System**
Panelist System Selection

<table>
<thead>
<tr>
<th>REVIEWER INFORMATION</th>
<th>PANEL INFORMATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Dr. Charles W Mandeville</td>
</tr>
<tr>
<td>Address</td>
<td>NSF 444 Arlington Boulevard Arlington, VA 22222, USA</td>
</tr>
<tr>
<td>E-Mail</td>
<td><a href="mailto:cman@nsf.gov">cman@nsf.gov</a></td>
</tr>
<tr>
<td>Office Phone</td>
<td>2223334444 ext:</td>
</tr>
<tr>
<td>Panel ID</td>
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</tr>
<tr>
<td>Panel Name</td>
<td>Instrumentation &amp; Facilities提案评审委员会(E)</td>
</tr>
<tr>
<td>Start Date</td>
<td>May 17 2006</td>
</tr>
<tr>
<td>End Date</td>
<td>May 19 2008</td>
</tr>
<tr>
<td>Cut-off Date</td>
<td>May 26 2008</td>
</tr>
<tr>
<td>Panel Status</td>
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</tr>
</tbody>
</table>

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

Proposal Evaluation Criteria

Please provide detailed comments on the quality of this proposal with respect to each of the two NSF Merit Review Criteria identified below, noting specifically the proposal's strengths and weaknesses. As guidance, a list of potential considerations that you might employ in your evaluation follows each criterion. These considerations are suggestions and not all will apply to any given proposal. While you are expected to separately address each NSF Merit Review Criterion, you are requested to address only those considerations that are relevant to this proposal and for which you are qualified to make judgments.

In addition, please provide an overall rating and summary statement that includes comments on the relative importance of the two criteria in assigning your rating. Please note that the criteria need not be weighted equally.

What is the intellectual merit of the proposed activity?

How important is the proposed activity to advancing knowledge and understanding within its own field or across different fields? How well qualified is the proposer (individual or team) to conduct the project? (If appropriate, the reviewer will comment on the quality of prior work.) To what extent does the proposed activity suggest and explore creative, original, or potentially transformative concepts? How well conceived and organized is the proposed activity? Is there sufficient access to resources?

What are the broader impacts of the proposed activity?

Potential considerations: How well does the activity advance discovery and understanding while promoting teaching, training, and learning? How well does the proposed activity broaden the participation of underrepresented groups (e.g., gender, ethnicity, disability, geography, etc)? To what extent will it enhance the infrastructure for research and education, such as facilities, instrumentation, networks, and partnerships? Will the results be disseminated broadly to enhance scientific and technological understanding? What may be the benefits of the proposed activity to society?

Figure 4  Proposal Evaluation Criteria section of the Panelist System Selection screen.
Your Potential Conflicts Of Interest

*For panel reviewers:*

If you have an affiliation or financial connection with the organization or person submitting the proposal that might be construed as creating a conflict of interest, describe those affiliations or interests in the Conflict of Interest section under "Prepare Review", and contact the cognizant NSF Program Officer before completing the review.

An NSF Program Officer will examine any statement of affiliations or interests for the existence of a conflict of interest. If you do not include a statement of potential conflicts of interest, NSF assumes that you have no conflicting affiliations or interests.

In addition, you must complete the Conflict-of-Interest and Confidentiality Statement for NSF Panelists (NSF Form 1230P dated 11/2011).

*For ad hoc reviewers:*

If you have an affiliation or financial connection with the organization or person submitting the proposal that might be construed as creating a conflict of interest, describe those affiliations or interests in the Conflict of Interest section under "Prepare Review", and contact the cognizant NSF Program Officer before completing the review.

An NSF Program Officer will examine any statement of affiliations or interests for the existence of a conflict of interest. If you do not include a statement of potential conflicts of interest, NSF assumes that you have no conflicting affiliations or interests.

Figure 5  Your Potential Conflicts of Interest section of the Panelist System Selection screen.

Your Obligation To Keep Proposals Confidential

The Foundation receives proposals in confidence and protects the confidentiality of their contents. For this reason, you must not copy, quote from, or otherwise use or disclose to anyone, including your graduate students or post-doctoral or research associates, any material from any proposal you are asked to review. Unauthorized disclosure of confidential information could subject you to administrative sanctions. If you believe a colleague can make a substantial contribution to the review, please obtain permission from the NSF Program Officer before disclosing either the contents of the proposal or the name of any applicant or principal investigator. When you have completed your review, please be certain to destroy the proposal.

Figure 6  Your Obligation to Keep Proposals Confidential section of the Panelist System Selection screen.
FastLane Help

Privacy Act and Public Burden Statements

The information requested on proposal forms and project reports is solicited under the authority of the National Science Foundation Act of 1950, as amended. The information on proposal forms will be used in connection with the selection of qualified proposers; and project reports submitted by awardees, will be used for program evaluation and reporting within the Executive Branch and to Congress. The information requested may be disclosed to qualified reviewers and staff assistants as part of the proposal review process; to proposer institutions/grantees to provide or obtain data regarding the proposal review process, award decisions, or the administration of awards; to government contractors, experts, volunteers and researchers and educators as necessary to complete assigned work; to other government agencies or other entities needing information regarding Proposers or nominees as part of a joint application review process; or in order to coordinate programs or policy; and to another Federal agency, court, or party in a court or federal administrative proceeding if the government is a party. Information about Principal Investigators may be added to the Reviewer file and used to select potential candidates to serve as peer reviewers or advisory committee members. See Systems of Records, NSF-50, “Principal Investigator/Proposal File and Associated Records,” 69 Federal Register 26410 (May 12, 2004), and NSF-51, “Reviewer/Proposal File and Associated Records,” 59 Federal Register 26410 (May 12, 2004). Submission of the information is voluntary. Failure to provide full and complete information, however, may reduce the possibility of receiving an award.

An agency may not conduct or sponsor, and a person is not required to respond to, an information collection unless it displays a valid OMB control number. The OMB control number for this collection is 3145-0088. Public reporting burden for this collection of information is estimated to average 120 hours per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and submitting the collection.

Suzanne H. Flimsht
Reports Clearance Officer
Division of Administrative Services
National Science Foundation
Arlington, VA 22230

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

Click to work on:
- Travel and Reimbursement
- Meeting Sign-in
- Panel Review System
- Interactive Panel System

Figure 8 Panelist Functions section of the Panelist System Selection screen.

Locate Your Panel Assignment Information

Your panel assignment information will be sent via email from your Program Officer (PO). However, you can reference the information (i.e., Panel/Meeting ID, Panel Name, Start Date, End Date, Cut-off Date, and Panel Status Active) online by doing the following:
1. Access FastLane by pointing your browser to www.fastlane.nsf.gov
2. Click Panelist Functions. The Panelist Functions screen displays.
3. Log in to the Panelist Functions. The Panelist System Selection screen displays (Figure 1).
4. Locate the Panel Information section of the Panelist System Selection screen (Figure 1).
Panelist System Selection

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. The password must contain at least one alphabetic and one numeric...
FastLane Help

Character. Passwords are not case sensitive. You cannot reuse the last three passwords you have used. Passwords expire every 365 days.

Figure 11: Change Password Screen

4. Click the **Submit** button.

A confirmation screen is displayed indicating you have successfully changed your password. You may select the **Applicant Home Page** link to return to your Application task list. Password length must be between 6 and 20 characters. The password must contain at least one alphabetic and one numeric character. Passwords are not case sensitive. You cannot reuse the last three passwords you have used. Passwords expire every 365 days.

**Update Your Personal Information**

After accepting to be a part of your first meeting, the following personal information that you provided to the National Science Foundation (NSF) is stored in FastLane:

- Title
- Last Name
- First Name
- Institution Address
- Institution Phone No.
- Institution FAX No.
- Email Address
- Website Address

Once you have logged into the FastLane Panelist Functions system, you can update any of the above information by doing the following:

1. Access FastLane by pointing your browser to [www.fastlane.nsf.gov](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
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).
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**

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

Figure 2  Panelist Functions screen. The Log In section is surrounded in red.

2. In the Log In section on the Panelist Functions screen (Figure 2), do the following:
   • In the Panel ID box, type the Panel/Meeting ID that you received from NSF.
   • In the Panelist Last Name box, type your last name.
   • In the Password box, type the password that you received from NSF.
3. Select the Login button (Figure 2). The Panelist System Selection screen displays (Figure 3).
Figure 3  Travel and Reimbursement link at the bottom of the Panelist System Selection screen.

4. Select Travel and Reimbursement (Figure 3). The Travel and Reimbursement Main screen displays (Figure 4). If this is the first time you have accessed the system for the meeting you plan to attend, you must register and therefore have access only to Participant Registration Questions, as in Figure 4. See Answer Participant Registration Questions.

Figure 4  Travel and Reimbursement screen with only Step 1 Participant Registration Questions accessible.

Register for a Meeting

Register for a Meeting Introduction

Before making travel and lodging arrangements, you must register as a participant for your meeting. The steps are as follows:

- Answer the participant registration questions.
- Confirm your Social Security Number (if you answered Yes to Question 1).
- Submit your personal contact and banking information. 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.)

Register for a Meeting Introduction
Before making travel and lodging arrangements, you must register as a participant for your meeting. The steps are as follows:

- **Answer the participant registration questions.**
- **Confirm your Social Security Number (if you answered Yes to Question 1).**
- **Submit your personal contact and banking information.** 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.)

**Answer Participant Registration Questions**

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

   ![Travel and Reimbursement screen. Step 1 Participant Registration Questions is circled.](image1)

2. Select **Step 1 Participant Registration Questions** (Figure 1). The Participant Registration Questions screen displays (Figure 2).
3. For each of the following questions, select either the Yes or No radio button:
   - Do you have a U.S. Social Security Number?
   - Are you a U.S. Federal Government Employee?
   - Are you a local participant?
   - Are you a Virtual Participant?
   - Are you a U.S. citizen or a permanent resident (green card holder)?
   - Is your home address located in the United States?
   - Do you have an account with a U.S. Financial Institution?
   - Will you be traveling to this meeting via commercial air or rail?
     Note: You must arrange your commercial air or rail ticket through the NSF’s travel agent.
   - Americans with Disabilities Act
     A. Will you require an interpreter, software to assist the visually impaired, or another modification at the meeting location?
     B. Do you have a medical condition that requires airfare other than a standard coach seat (e.g. first class, bulkhead, or other special accommodation) or ground transportation other than taxi? Your request will be processed by NSF’s Office of Diversity and Inclusion (ODI) in which you will have to supply a current note from a competent medical authority to validate your requirement. This information will be kept confidential within ODI.
     Note: the above questions apply only to individuals with qualified disabilities.

4. Select the Continue button (Figure 1).

Note: To help you answer accurately, select the definition links under the questions to see the definition of terms
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).

Figure 1  Personal Banking/Contact Information screen. The Submit button is circled.

2. In the Enter Social Security Number box on the Personal Banking/Contact Information screen (Figure 1), type your Social Security Number.

3. In the Re-Enter Social Security Number box on the Personal Banking/Contact Information screen (Figure 1), type your Social Security Number again.

4. Select one of the three radio buttons regarding Payment Eligibility:
   • By default, you are eligible for full payment, determined by your answers to the registration questions. If you wish to receive all payment for which you are eligible, select the “Full Payment” option.
   • If you do not wish to enter your Social Security Number, you may select the “No Payment” option.
   • Of you are ineligible to receive compensation for services rendered to NSF for this meeting, based on your employer’s policy that you are prohibited from accepting compensation aside from expense reimbursement, select the “Partial Payment” option.

5. Select the Submit button (Figure 1). One of two types of Personal Banking/Contact Information screens displays for you to submit your contact and banking information, according to whether you have:
   • A U.S. address and a U.S. financial institution
   • A foreign address and a U.S. financial institution

If you choose “Partial Payment” and waive your right to compensation, NSF will only reimburse for expenses incurred. To waive compensation for services rendered to NSF, select the “Partial Payment” radio button and Submit. The Waiver of Compensation Confirmation Screen will display.

Verify Your Reviewer Address History

1. Review and verify your Reviewer Address History with the National Science Foundation (Figure 1).
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 institution
- Foreign address and No U.S. financial institution
- Foreign address and U.S. financial institution

**Complete Personal Contact and Banking Information Introduction**

Depending upon how you answered the participant registration questions, you will submit personal contact and banking information for one of the following:

- U.S. address and U.S. financial institution
- Foreign address and No U.S. financial institution
- Foreign address and U.S. financial institution

**Complete Information for U.S. Address and U.S. Financial Institution**

*If you have a U.S. Social Security Number (SSN), you must confirm your SSN before you can access the Personal Banking/Contact Information screen.*

1. Access the **Personal Banking/Contact Information** screen for a U.S. address and U.S. financial institution (Figure 1) (see Answer Participant Registration Questions or Confirm Social Security Number).

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’.

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.
5. In the Financial Institution Information section of the Personal Banking and Contact Information screen (Figure 1), do the following:
   - In the Bank Routing Number box, type the Bank Routing Number for your U.S. financial institution.
   - In the Account Number box, type your account number at this institution.
   - In the Account Type box, select the radio button for either checking or savings.
6. Select the Continue button (Figure 1). The Personal Banking/Contact Information Confirmation screen displays (Figure 2).

   Figure 2   Personal Banking/Contact Information Confirmation screen.

7. Confirm that the information you typed is correct.

   If you need to edit the information:
   Select the Edit button (Figure 2), and the Personal Banking/Contact Information screen 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 Institution

1. Access the Personal Contact Information screen for a foreign address and no U.S. financial institution (Figure 1) (see Answer Participant Registration Questions).

   Figure 1   Personal Contact Information screen for a foreign address and No U.S. financial institution.

2. In the Full Legal name section, enter your full legal name under which you file your taxes on the Personal Banking and Contact Information screen (Figure 1), do the following:
   - In the First Name box, type your first name.
   - In the Middle Initial box, type the first letter of your middle name (optional).
   - In the Last Name box, type your last name.
   - In the Suffix drop down, select your suffix (optional).
   - In the Date of Birth box, type your date of birth (mm/dd/yyyy).
   - In the Gender Drop down, select your gender.
3. In the Permanent Foreign Residence Address section of the Personal Contact Information screen (Figure 1), do the following:
• In the **Address 1** box, type the first line of the street address.
• In the **Address 2** box, type the second line of the street address (optional).
• In the **Address 3** box, type the second line of the street address (optional).
• In the **City, State/Province, Zip/Postal Code, Country** box, type your city, state/province, zip/postal code, and country.
• In the **Email Address** box, type your email address.

  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).

![Personal Contact Information Confirmation screen.](image)

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.

![Personal Contact Information Results screen. The OK button is circled.](image)

2. Select the **OK** button (Figure 3). The **Travel and Reimbursement Main** screen displays. You have now completed registration for the meeting and can proceed to make travel arrangements or submit expenses, if applicable.
Complete Information for Foreign Address and U.S. Financial Institution

If you have a U.S. Social Security Number (SSN), you must confirm your SSN before you can access the Personal Banking/Contact Information screen.

1. Access the Personal Banking/Contact Information screen for a foreign address and U.S. financial institution (Figure 1) (see Answer Participant Registration Questions or Confirm Social Security Number).

![Figure 1](image-url)  Personal Banking/Contact Information screen for a foreign address and U.S. financial institution.

2. In the Full Legal name section, enter your full legal name under which you file your taxes on the Personal Banking and Contact Information screen (Figure 1), do the following:
   - In the First Name box, type your first name.
   - In the Middle Initial box, type the first letter of your middle name (optional).
   - In the Last Name box, type your last name.
   - In the Suffix drop down, select your suffix (optional).

3. In the Permanent Foreign Residence Address section of the Personal Contact Information screen (Figure 1), do the following:
   - In the Address 1 box, type the first line of the street address.
   - In the Address 2 box, type the second line of the street address (optional).
   - In the Address 3 box, type the second line of the street address (optional).
   - In the City, State/Province, Zip/Postal Code, Country box, type your city, state/province, zip/postal code, and country.
   - In the Email Address box, type your email address.
   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 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 in is correct.

*If you need to edit the information:*  
Select the *Edit* button (Figure 2). 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.

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.

**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?"
FastLane Help

- Registered for the meeting and submitted your personal contact and banking information.
- Registered as a Non-Federal, Non-Local, Attending On-Site participant.

NSF reimburses the following expense:
- **Personally owned vehicle (POV) mileage and toll expenses** for those who used their own automobile, motorcycle, or airplane to get to/from the meeting

  **Note:** Reservations for air or rail transportation must be made through the NSF travel management contractor.

You can edit your expense reimbursement submission up to the point that NSF begins processing it. If you still need to submit more expenses, you can **submit additional POV expenses** after NSF has completed processing your initial expenses.

See NSF Policy on Expense Reimbursement for details on those expenses NSF reimburses.

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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.
• **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).

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

2. On the Submit Expenses screen (Figure 1), select Personally Owned Vehicle (POV) Mileage. The Personally Owned Vehicle (POV) Mileage screen displays (Figure 2).
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)

**Figure 3** Screen with message that your expenses have been submitted to NSF for approval. The OK button is circled.

6. Select **OK** (Figure 3). The **Travel and Reimbursement Main** screen displays.

   You can edit your expenses up to the point that NSF begins processing your submission.

**Submit Additional POV Expenses**

You can submit additional expenses only after NSF has completed processing of your initial POV expenses submission. See [NSF Policy on Expense Reimbursement](#) for details on what can be reimbursed.

1. Access the **Submit Expenses** screen (Figure 1) (see [Access Submit Expenses](#)).
Figure 1  Submit Expenses screen. The Personally Owned Vehicle (POV) Mileage link is circled.

2. On the Submit Expenses screen (Figure 1), select Personally Owned Vehicle (POV) Mileage. The Personally Owned Vehicle (POV) Mileage screen displays (Figure 2).

![Personally Owned Vehicle (POV) Mileage screen](image)

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).

![Additional Expenses screen for Personally Owned Vehicle (POV) Mileage](image)

Figure 3  Additional Expenses screen for Personally Owned Vehicle (POV) Mileage.

4. In the New Amendment’s POV Mileage box (Figure 3), type the additional amount of POV mileage.
5. In the New Amendment’s Toll Amount box (Figure 3), type the additional amount of toll expenses.
6. Select the Submit button (Figure 3). A screen displays (Figure 4) with the message that your additional POV expense amount has been submitted to NSF for approval.
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.

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).
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).
4. **Select** the Meeting Sign-in link (Figure 3).

**Meeting Sign-In**

<table>
<thead>
<tr>
<th>Complete Daily Meeting Sign-in</th>
</tr>
</thead>
</table>

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.

**Reviewing Reimbursement Profile**

The Meeting Sign-in Screen will display a participant’s current registration status as well as the type of...
FastLane Help

reimbursement for which the participant is eligible. This status is determined by the answers provided during meeting registration. For definitions to terminology, click on one of the hyperlinked terms within the reimbursement profile.

Figure 3 Meeting Sign-in Screen after clicking the “Non-Federal Participant” hyperlink.

Should a participant deem their registration profile to be incorrect, the link to update registration questions will enable the participant to review and edit the answers to the registration questions.

The reimbursement profile hyperlinks and the link to the registration questions are available throughout the duration of the meeting.

Answering Transportation Questions

The Meeting Sign-in Sheet will require panelists to answer two transportation questions before signing-in.

1. “How did you travel to the meeting?”
2. “How will you return from the meeting?”

Select an answer from the radio button options to each question. The transportation questions only need to be answered once, on the first day of signing-in for the meeting.
Figure 4  Meeting Sign-in Screen with NSF Purchased Commercial Air/Rail selected as answers to the Transportation Questions.

Meeting Attendance

1. Select an Attendance Type for the current day from the dropdown.
   - In Person- NSF
   - In Person- Other Meeting Location
   - TeleConference
   - Webcast
   - VideoConference
   - Online Forum
   - Other

   For definitions to the attendance types, click on the “Attendance Type” hyperlink above the dropdown.

2. Click Sign-in, to sign-in to the meeting for that day. A message will appear at the top of the sign-in screen to alert you that the sign-in has been successful and will provide a link to the Panelist Functions Home Page. Additionally, the “Signed in” column will now reflect the sign in for the day, by changing from “No” to “Yes.”

Attendance type can be changed for the duration of the meeting day. Once the meeting day has passed, the panelist will be unable to change the attendance type for any day other than the current day.
Figure 5  Meeting Sign-in Screen with Cursor on the Attendance Type Dropdown.

Figure 6  Meeting Sign-in Screen after signing-in to the meeting.

Panel Review System

Panel Review System Introduction
FastLane Help

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

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View a Proposal in the Panel Review System

To view a proposal in PRS, do the following:

1. Access FastLane by pointing your browser to www.fastlane.nsf.gov
2. Click Panelist Functions. The Panelist Functions screen displays.
3. Log in to the Panelist Functions with the initial log on information provided by your Program Officer (PO). The Panelist System Selection screen displays (Figure 1).

   Figure 1  Panel Review System link at the bottom of the Panelist System Selection screen.

4. At the bottom of the Panelist System Selection screen, click Panel Review System (Figure 1). The Panel Review screen displays (Figure 2).
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>
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<td>Not Yet Started</td>
<td>No</td>
</tr>
<tr>
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<td>Feldman</td>
<td>Panelist</td>
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<td>Janieson</td>
<td>Panelist</td>
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<td>Harris</td>
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<td>Not Yet Started</td>
<td>No</td>
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<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.

Prepare Review

View/Download Proposal

Proposal Print Request

Proposals on CD Request

Highlight the proposal you want to view or the proposals you want to download and click the appropriate action button. To select multiple contiguous items from the list box, hold down the Shift key and click on the desired proposal. To make non-contiguous selections, hold down the Ctrl key in Windows or the Command key in the Macintosh and click on the desired proposal.

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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).
Prepare a Panel Review

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

18. Click the **Return** button on the **Receipt of Panel Review** screen (Figure 4).

![Figure 4](image)

**Figure 4** Receipt of Panel Review screen.

### Resubmit/Edit a Panel Review

To edit a previously submitted Panel Review, do the following, if before the cutoff date:

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 **Panel System Selection** screen displays (Figure 1).
4. Locate the **Click to Work On** section (Figure 1).
5. Click **Panel Review System** (Figure 1).

![Figure 1](image)

**Figure 1** 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 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

---

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 **ResSubmit Review** button (Figure 4). The **Receipt of Panel Review** screen displays.

13. Click the **Return** button (Figure 5).

**Figure 4  Ressubmit Review button on the Panel Review screen.**

**Figure 5  Receipt of Panel Review screen.**

**Retrieve a Saved Panel Review**

If you have prepared and saved a Panel Review but not submitted it, you retrieve the review for further editing or submission as follows:

1. Access FastLane by pointing your browser to **www.fastlane.nsf.gov**
2. Click **Panelist Functions**. The **Panelist Functions** screen displays.
3. Log in to the Panelist Functions with the initial log on information provided by your Program Officer (PO). The **Panelist System Selection** screen displays (Figure 1).
4. Locate the **Click to Work On** section (Figure 1).
5. Click **Panel Review System** (Figure 1).

![Figure 1 Panel Review System link at the bottom of the Panelist System Selection screen.](image)

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.

![Figure 2 Prepare Review button on the Prepare Review tabbed page.](image)

**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.

  ![Panel Status screen](image)

  **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 Status screen.

- **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
Print the contents of the Interactive Panel System book.

The Interactive Panel System (IPS) is an electronic FastLane system that allows panelists to do the following:

- **View a proposal**
- **Print a proposal**
- **Write a review comment**
- **View review comments**
- **Print review comments**
- **Prepare reviews**
- **Prepare recommendations**
- **Write Panel Summaries**
- **Review Panel Summaries**
- **Approve Panel summaries**
- **Update personal information**

**IPS Layout**

IPS is divided into three tabbed screens:

- **Panel Status** (Figure 1) (Default) - displays basic information on all proposals assigned to the panel as well as a summary of the work done by the entire panel, including individual proposal ratings, panel recommendations, comments, and panel summary status.

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

- **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).
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*Figure 2  My Status screen.*

*Figure 3  My Work screen.*
**My Work Screen Overview**

Your **My Work** tabbed screen is your work area to create, view, and review proposals, comments, and panel summaries, depending upon your role and the way your Program Officer (PO) set up the panel. Your **My Work** screen is actually modified to display only the functions you can perform; for example, if you are not a scribe you will not see the **Summary** tab as scribes are the panelists who write the Panel Summaries.

**My Work Menus**

Regardless of your role or the panel settings, you can easily navigating to your proposals with the My Work Menus on the left side of the screen (Figure 1, Section A):

- Action Required Proposals
- No Action Required Proposals
- Completed Proposals
- Not Assigned to You

The proposals within each category can be ordered in the following ways:

- Discussion Order (as set by the PO)
- Proposal ID
- Summary Status

with the **Proposals Sorted By** box (Figure 1, Section C).

**My Work Other Function Boxes**

You can quickly perform many of your individual panel duties with the quick access Other Function box on the left side of the screen (Figure 1, Section B):

- **Print Summary** (scribe only)
- **Recommendation**
- **Prepare Reviews**
- **Name/Addr Info**

![Figure 1](image)

**Figure 1**  My Work screen layout.

**IPS Functions**
View a Proposal in IPS

To view a proposal from IPS, do the following:
1. Access FastLane by pointing your browser to [www.fastlane.nsf.gov](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 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](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 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

- **My Status**
  - Click the **My Status** tab.
  - Click the proposal number in the Proposal Number column.
  - Click the **View/Print Proposal** tab.
  - Click the proposal section you want to print. Or, click **Print Entire Proposal** to print all proposal parts.
  - Click the **OK** button. Your selection opens in a new window.
  - Click the **Print** button.

- **My Work**
  - Click the **My Work** tab.
  - Click the **View/Print Proposal** tab.
  - Click the proposal section you want to print. Or, click **Print Entire Proposal** to print all proposal parts.
  - Click the **OK** button. Your selection opens in a new window.
  - 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](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**
      - Click the **Panel Status** tab.
      - Click the proposal number in the Proposal Number column.
      - Click the **Write Comment** tab.
      - Type your comment text in the **Write Comment** box.
      - (Optional) Click the **Check Spelling** button to check your spelling.
      - 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**
      - Click the **My Status** tab.
      - Click the proposal number in the Proposal Number column.
      - Click the **Write Comment** tab.
      - Type your comment text in the **Write Comment** box.
      - (Optional) Click the **Check Spelling** button to check your spelling.
      - 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**
      - Click the **My Work** tab.
      - Click the **Write Comment** tab.
      - Type your comment text in the **Write Comment** box.
      - (Optional) Click the **Check Spelling** button to check your spelling.
      - 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
2. Click Panelist Functions. The Panelist Functions screen displays.
3. Log in to the Panelist Functions with the initial log on information provided by your Program Officer (PO). The Panelist System Selection screen displays.
4. Locate the Click to Work On section.
5. Click Interactive Panel System.
6. Continue one of the following routes:
   • Panel Status
     a. Click the Panel Status tab.
     b. Click the proposal number in the Proposal Number column.
     c. Select Prepare Reviews from the Other Functions box. The Panel Review System (PRS) opens in a new window.
     d. Follow the PRS instructions on completing a review.
   • My Status
     a. Click the My Status tab.
     b. Click the proposal number in the Proposal Number column.
     c. Select Prepare Reviews from the Other Functions box. The Panel Review System (PRS) opens in a new window.
     d. Follow the PRS instructions on completing a review.
   • My Work
     a. Click the My Work tab.
     b. Select Prepare Reviews from the Other Functions box. The Panel Review System (PRS) opens in a new window.
     c. Follow the PRS instructions on completing a review.

See also: Proposal Review

View Other Panelists' Proposal Reviews

After submitting your own proposal review, and your PO setting up the panel in this manner, you can view other panelists' proposal reviews as follows:

1. Access FastLane by pointing your browser to www.fastlane.nsf.gov
2. Click Panelist Functions. The Panelist Functions screen displays.
3. Log in to the Panelist Functions with the initial log on information provided by your Program Officer (PO). The Panelist System Selection screen displays.
4. Locate the Click to Work On section.
5. Click Interactive Panel System.
6. Continue one of the following routes:
   • Panel Status
     a. Click the Panel Status tab.
     b. Click the proposal number in the Proposal Number column.
     c. Click the Reviews tab.
   • My Status
     a. Click the My Status tab.
     b. Click the proposal number in the Proposal Number column.
     c. Click the Reviews tab.
   • My Work
     a. Click the My Work tab.
     b. Click the Reviews tab.

Prepare a Recommendation
If the PO has granted you permission, you can provide other panelists recommendations on the proposal being reviewed as follows:

1. Access FastLane by pointing your browser to www.fastlane.nsf.gov
2. Click Panelist Functions. The Panelist Functions screen displays.
3. Log in to the Panelist Functions with the initial log on information provided by your Program Officer (PO). The Panelist System Selection screen displays.
4. Locate the Click to Work On section.
5. Click Interactive Panel System.
6. Continue one of the following routes:
   - Panel Status
     a. Click the Panel Status tab.
     b. Click the proposal number in the Proposal Number column.
     c. Select Recommendations from the Other Functions box.
     d. Select the recommendation from the drop-down box in the Recommendation column.
     e. Click the Save Recommendations button.
   - My Status
     a. Click the My Status tab.
     b. Click the proposal number in the Proposal Number column.
     c. Select Recommendations from the Other Functions box.
     d. Select the recommendation from the drop-down box in the Recommendation column.
     e. Click the Save Recommendations button.
   - My Work
     a. Click the My Work tab.
     b. Select Recommendations from the Other Functions box.
     c. Select the recommendation from the drop-down box in the Recommendation column.
     d. Click the Save Recommendations button.

Note: Your Program Officer may prefer that you order the proposals instead of making recommendations; if so, you will use the Ordering column drop-down box instead of the Recommendations column drop-down box. Your Program Officer will provide instructions on what actions to take.

Write a Panel Summary

If you are a Scribe, you can create a Panel Summary as follows:

1. Access FastLane by pointing your browser to www.fastlane.nsf.gov
2. Click Panelist Functions. The Panelist Functions screen displays.
3. Log in to the Panelist Functions with the initial log on information provided by your Program Officer (PO). The Panelist System Selection screen displays.
4. Locate the Click to Work On section.
5. Click Interactive Panel System.
6. Continue one of the following routes:
   - Panel Status
     a. Click the Panel Status tab.
     b. Click the proposal number in the Proposal Number column.
     c. Select Summary tab.
     d. Type your Panel Summary text in the text box.
     e. Click the Save button.
   - My Status
     a. Click the My Status tab.
     b. Click the proposal number in the Proposal Number column.
     c. Select Summary tab.
     d. Type your Panel Summary text in the text box.
e. Click the **Save** button.

- **My Work**
  a. Click the **My Work** tab.
  b. Select **Summary** tab.
  c. Type your Panel Summary text in the text box.
  d. Click the **Save** button. See also **Proposal Review**.

### Submit a Panel Summary for Comment

*If you are a Scribe and have a draft saved*, you can release the Panel Summary draft to the panel for comments as follows:

1. Access FastLane by pointing your browser to [www.fastlane.nsf.gov](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 **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](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. The Panel Summary displays.
   - **My Status**
     a. Click the **My Status** tab.
     b. Click the proposal number in the **Proposal Number** column.
Submit a Panel Summary for Final Approval

If you are a Scribe and have a draft saved or have received comments from the panel on your panel summary draft, you can release the Panel Summary to the panel for final approval as follows:

1. Access FastLane by pointing your browser to www.fastlane.nsf.gov
2. Click Panelist Functions. The Panelist Functions screen displays.
3. Log in to the Panelist Functions with the initial log on information provided by your Program Officer (PO). The Panelist System Selection screen displays.
4. Locate the Click to Work On section.
5. Click Interactive Panel System.
6. Continue one of the following routes:
   - **Panel Status**
     a. Click the Panel Status tab.
     b. Click the proposal number in the Proposal Number column.
     c. Select Summary tab.
     d. Click the Submit Draft for Final Approval comment.
   - **My Status**
     a. Click the My Status tab.
     b. Click the proposal number in the Proposal Number column.
     c. Select Summary tab.
     d. Click the Submit Draft for Final Approval comment.
   - **My Work**
     a. Click the My Work tab.
     b. Select Summary tab.
     c. Click the Submit Draft for Final Approval comment.

Approve a Panel Summary

If the panel Scribe has made the Panel Summary available for review or final approval, you can approve the summary, if required, in one of the following three ways:

**Method 1 - From the Summary Tab**

1. Access FastLane by pointing your browser to www.fastlane.nsf.gov
2. Click Panelist Functions. The Panelist Functions screen displays.
3. Log in to the Panelist Functions with the initial log on information provided by your Program Officer (PO). The Panelist System Selection screen displays.
4. Locate the Click to Work On section.
5. Click Interactive Panel System.
6. Continue one of the following routes:
   - **Panel Status**
     a. Click the Panel Status tab.
     b. Click the proposal number in the Proposal Number column.
     c. Select the Summary tab.
     d. Note your name in the Approval Needed list.
     e. Click the Approve button.
   - **My Status**
     a. Click the My Status tab.
     b. Click the proposal number in the Proposal Number column.
     c. Select the Summary tab.
d. Note your name in the Approval Needed list.
e. Click the Approve button.

- My Work
  a. Click the My Work tab.
  b. Select the Summary tab.
  c. Note your name in the Approval Needed list.
  d. Click the Approve button.

Method 2 - From the Other Functions

1. Access FastLane by pointing your browser to www.fastlane.nsf.gov
2. Click Panelist Functions. The Panelist Functions screen displays.
3. Log in to the Panelist Functions with the initial log on information provided by your Program Officer (PO). The Panelist System Selection screen displays.
4. Locate the Click to Work On section.
5. Click Interactive Panel System.
6. Continue one of the following routes:
   - Panel Status
     a. Click the Panel Status tab.
     b. Click the proposal number in the Proposal Number column.
     c. Select the Approve All Summ. in the Other Functions box.
     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 All button.

Method 3 - From the Other Functions Tab (Approving All Summaries)

1. Access FastLane by pointing your browser to www.fastlane.nsf.gov
2. Click Panelist Functions. The Panelist Functions screen displays.
3. Log in to the Panelist Functions with the initial log on information provided by your Program Officer (PO). The Panelist System Selection screen displays.
4. Locate the Click to Work On section.
5. Click Interactive Panel System.
6. Continue one of the following routes:
   - Panel Status
     a. Click the Panel Status tab.
     b. Click the proposal number in the Proposal Number column.
     c. Select the Approve All Summ. in the Other Functions box.
     d. Click the Approve All button.
   - My Status
     a. Click the My Status tab.
     b. Click the proposal number in the Proposal Number column.
     c. Select the Approve All Summ. in the Other Functions box.
     d. Click the Approve All button.
   - My Work
a. Click the My Work tab.
b. Select the Approve All Summ. in the Other Functions box.
c. Click the Approve All button.
See also Proposal Review.

Print a Panel Summary

If you are a Scribe, you can print out a Panel Summary as follows:

1. Access FastLane by pointing your browser to www.fastlane.nsf.gov
2. Click Panelist Functions. The Panelist Functions screen displays.
3. Log in to the Panelist Functions with the initial log on information provided by your Program Officer (PO). The Panelist System Selection screen displays.
4. Locate the Click to Work On section.
5. Click Interactive Panel System.
6. Continue one of the following routes:
   • Panel Status
     a. Click the Panel Status tab.
     b. Click the proposal number in the Proposal Number column.
     c. Select Summary tab.
     d. Click the Print button.
   • My Status
     a. Click the My Status tab.
     b. Click the proposal number in the Proposal Number column.
     c. Select Summary tab.
     d. Click the Print button.
   • My Work
     a. Click the My Work tab.
     b. Select Summary tab.
     c. Click the Print button.

Update Personal Information in IPS

After accepting to be a part of your first panel, the following demographic information that you provided to the National Science Foundation (NSF) is stored in FastLane:

- Race
- Ethnicity
- Citizenship
- Gender
- Disability

You can update your personal information from IPS as follows:

1. Access FastLane by pointing your browser to www.fastlane.nsf.gov
2. Click Panelist Functions. The Panelist Functions screen displays.
3. Log in to the Panelist Functions with the initial log on information provided by your Program Officer (PO). The Panelist System Selection screen displays.
4. Locate the Click to Work On section.
5. Click Interactive Panel System.
6. Continue one of the following routes:
   • Panel Status
     a. Click the Panel Status tab.
     b. Click the proposal number in the Proposal Number column.
     c. Select Name/Addr Info from the Other Functions box. The PRS Reviewer’s Information screen opens in another window.
d. Complete the PRS instructions for Changing Your Personal Information to finish changes to your personal information from IPS.

• **My Status**
  
  a. Click the My Status tab.
  b. Click the proposal number in the Proposal Number column.
  c. Select Name/Addr Info from the Other Functions box. The PRS Reviewer’s Information screen opens in another window.
  d. Complete the PRS instructions for Changing Your Personal Information to finish changes to your personal information from IPS.

• **My Work**
  
  a. Click the My Work tab.
  b. Select Name/Addr Info from the Other Functions box. The PRS Reviewer’s Information screen opens in another window.
  c. Complete the PRS instructions for Changing Your Personal Information to finish changes to your personal information from IPS.

**Interact with the Panel**

The Interactive Panel System (IPS) is designed for real-time proposal reviewing. While logged in, you can be notified when another panelist has performed a action (e.g., posted a comment) as follows:

1. Access FastLane by pointing your browser to www.fastlane.nsf.gov
2. Click Panelist Functions. The Panelist Functions screen displays.
3. Log in to the Panelist Functions with the initial log on information provided by your Program Officer (PO). The Panelist System Selection screen displays.
4. Locate the Click to Work On section.
5. Click Interactive Panel System.
6. Continue one of the following routes:

   • **Panel Status**
     a. Click the Panel Status tab.
     b. When the History box flashes, expand it to see a History of panelist actions.

   • **My Status**
     a. Click the My Status tab.
     b. When the History box flashes, expand it to see a History of panelist actions.

   • **My Work**
     a. Click the My Work tab.
     b. When the History box flashes, expand it to see a History of panelist actions.

   **Provide Feedback on IPS**

You can provide the National Science Foundation (NSF) feedback on IPS as follows:

1. Access FastLane by pointing your browser to www.fastlane.nsf.gov
2. Click Panelist Functions. The Panelist Functions screen displays.
3. Log in to the Panelist Functions with the initial log on information provided by your Program Officer (PO). The Panelist System Selection screen displays.
4. Locate the Click to Work On section.
5. Click Interactive Panel System.
6. Continue one of the following routes:

   • **Panel Status**
     a. Click the Panel Status tab.
     b. Click the proposal number in the Proposal Number column.
     c. Select General Comments from the Other Functions box.
     d. Type your comments in the box.
     e. Select the Yes radio button.
     f. Click the Save button.
FastLane Help

g. Click the OK button from the confirmation box.

- **My Status**
  a. Click the **My Status** tab.
  b. Click the proposal number in the **Proposal Number** column.
  c. Select **General Comments** from the **Other Functions** box.
  d. Type your comments in the box.
  e. Select the **Yes** radio button.
  f. Click the **Save** button.
  g. Click the OK button from the confirmation box.

- **My Work**
  a. Click the **My Work** tab.
  b. Select **General Comments** from the **Other Functions** box.
  c. Type your comments in the box.
  d. Select the **Yes** radio button.
  e. Click the **Save** button.
  f. Click the OK button from the confirmation box.

**Honorary Awards**

**Honorary Awards Introduction**

**Print the contents of the Honorary Awards book.**

In the Honorary Awards module, researchers can submit nominations and references/letters of support for nominees for the following NSF awards:

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

The Alan T. Waterman Award, the National Medal of Science and the Vannevar Bush Award require references. When you prepare a nomination for any of these awards, you are required to indicate the names and contact information for the individuals who will submit a reference on behalf of your nominee. As a nominator you are responsible for ensuring that your suggested references submit their information in a timely manner.

Nomination for the National Medal of Science, the Vannevar Bush and the National Science Board Public Service award 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).
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.
6. Click the Submit button (Figure 4). The Confirm Register User screen displays (Figure 5).
7. Click the **Confirm** button (Figure 5). The **Confirmation** screen displays (Figure 6).

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).

Figure 1  FastLane Home Page screen. The Honorary Awards link is circled.

Figure 7  Honorary Awards screen.
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

The Alan T. Waterman Award is given annually in recognition of an outstanding young researcher in any field of science or engineering supported by the National Science Foundation.

You have the following options in preparing an Alan T. Waterman Award:

- View the award criteria
- Find background information on the award
- Get the listing of the award’s past winners
- Prepare a nomination for the award

If you have been designated to write a reference for a nominee for the Alan T. Waterman Award, see [Prepare a Waterman Reference](#).

### Alan T. Waterman Award Introduction

The Alan T. Waterman Award is given annually in recognition of an outstanding young researcher in any field of science or engineering supported by the National Science Foundation.

You have the following options in preparing an Alan T. Waterman Award:

- View the award criteria
- Find background information on the award
- Get the listing of the award’s past winners
• Prepare a nomination for the award

If you have been designated to write a reference for a nominee for the Alan T. Waterman Award, see Prepare a Waterman Reference.

View Award Criteria for Alan T. Waterman Award

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

![Figure 1: Honorary Awards screen. The Alan T. Waterman Award link is circled.](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 View Award Criteria link is circled.](image)
3. Click **View Award Criteria** (Figure 2). The **Award Selection Criteria** screen displays (Figure 3) with the formal criteria for the award.

![Figure 3](image)

**Figure 3**  
Award Selection Criteria screen.

**Find Background Information on Alan T. Waterman Award**

1. Access the **Honorary Awards** screen (Figure 1) (see **Register for Honorary Awards** or **Log In to Honorary Awards**).

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

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).

   ![Honorary Awards screen](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).
Figure 2  Alan T. Waterman Award screen. The Prepare a New Nomination tab is circled.

3. Click the Prepare a Nomination tab (Figure 2). The Instructions for Preparing a Nomination screen displays (Figure 3) with general instructions for completing the nomination.

Figure 3  Instructions for Preparing a Nomination screen. The View Nomination Form Description link is circled.
4. To see the form requirements, click View Nomination Form Description (Figure 3). The Nomination Form Description screen displays (Figure 4) with a listing of all the components of the Nomination Form.

![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).

7. Click the Begin Nomination button (Figure 6). The Nomination Form screen displays (Figure 7) with the Nomination Information section open.
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
FastLane Help

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.
Figure 11: References section of the Nomination Form screen. The Save and Continue button is circled.

21. In the References section (Figure 11), list at least four references who are not from the nominee’s
organization and who are familiar with the technical aspects of the nominee’s work. For each reference, enter the following information in the appropriate boxes:

- First name
- Last name
- Address
- City
- State
- Zip code
- Country
- International postal code (optional)
- Email
- Phone number
- Fax number (optional)
- Organization

You have now completed the Nomination form. You have these options:

- Save the nomination to edit it or submit it later
- Submit the nomination

Submit a Nomination for the Alan T. Waterman Award

1. Access the Nomination Form screen (Figure 1) with the Submit Nomination section open (see Complete the Nomination Form).

2. Click the Submit button (Figure 1). The Confirm Award Nomination Submission screen displays (Figure 2).
Figure 2  Confirm Award Nomination Submission screen. The Confirm button is circled.

3. Click the Confirm button (Figure 2). The Confirmation screen displays (Figure 3) with the message that the nomination has been submitted.

Figure 3  Confirmation screen.

4. Click the Back to Award Homepage (Figure 3). The Alan T. Waterman Award screen displays (Figure 4) with the nomination listed with the status of Submitted.
Save a Nomination for the Waterman Award

After you have completed at least the first section of a nomination, you can save it for future work.

1. Access the **Nomination Form** screen (Figure 1) and complete at least the first section of the nomination (see [Complete the Nomination Form](#)).
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).

![Nomination Form screen open to the References section. The Save button is circled.](image1)

**Figure 1** Nomination Form screen open to the References section. The Save button is circled.

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

**Figure 2** Nomination Form screen after the nomination has been saved.

The nomination is now listed on the Alan T. Waterman Award screen (Figure 3) with the status of In Progress.

![Alan T. Waterman Award screen with the saved nomination listed with the status of In Progress.](image3)

**Figure 3** Alan T. Waterman Award screen with the saved nomination listed with the status of In Progress.
Edit a Saved Nomination for the Alan T. Waterman Award

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

![Figure 1](image1.png) 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](image2.png) 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.
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).
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]).

   ![Honorary Awards screen. The Alan T. Waterman Award link is circled.](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).

   ![Alan T. Waterman Award screen. The link to the saved nomination is circled.](image)

   **Figure 2**  
   Alan T. Waterman Award screen. The link to the saved nomination is circled.

3. Click the nomination title (Figure 2). The **Nomination Form** screen displays (Figure 3).
Figure 3  Nomination Form screen. The View Saved Nomination link is circled.

4. Click View Saved Nomination (Figure 3). The View Entire Nomination screen displays (Figure 4). You can edit from this screen also by clicking the Edit button for any section.
View Entire Nomination 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).
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).

![Alan T. Waterman Award screen](image1)

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).

![Instructions for Preparing a Reference screen](image2)

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.
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.

**Figure 7** Reference Form screen with the Nominee Description section open. The **Save** and **Continue** buttons are circled.
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).

2. On the Reference Form screen (Figure 1), click the Submit button. The Confirm Award Reference 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 Alan T. Waterman Award screen displays (Figure 4) with the reference listed with the status of Submitted.

Figure 3  Confirmation screen.

Figure 4  Alan T. Waterman Award screen with the reference listed with the status of Submitted.

Save a Reference for the Alan T. Waterman Award

After you have completed at least the first section of a reference, you can save it for future work.

1. Access the Reference Form screen (Figure 1) and complete at least the first section of the reference (see Complete the Reference Form).
Figure 1  Reference Form screen. The Save button is circled.

2. On the Reference Form screen (Figure 1), click the Save button. The reference is now listed on the Alan T. Waterman Award screen (Figure 2) with the status of In Progress.

Figure 2  Alan T. Waterman Award screen. The reference is now listed with the status of In Progress.

Edit a Saved Reference for the Alan T. Waterman Award
1. Access the **Honorary Awards** screen (Figure 1) (see [Log In to Honorary Awards](#)).

![Figure 1](image1.png)

**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](image2.png)

**Figure 2**  
Alan T. Waterman Award screen. The Reference title link is circled.

3. Click the title of the reference (Figure 2). The **Reference Form** screen displays (Figure 3). On this screen, you can edit any section by clicking on the section title and then clicking the *Save and Continue* button or *Save* button (see [Complete the Reference Form](#), Step 7 through Step 13, for detailed instructions on each section).
Figure 3 Reference Form screen.
Submit a Saved Reference for the Alan T. Waterman Award

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

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

2. On the Honorary Awards screen (Figure 1), click Alan T. Waterman Award. The Alan T. Waterman Award screen displays (Figure 2) with the reference listed in the Work in Progress section.

Figure 2 Alan T. Waterman Award screen. The Reference title link is circled.

3. Click the title of the reference (Figure 2). The Reference Form screen displays (Figure 3).
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).
Figure 5 Confirm Award Reference Submission screen. The Confirm button is circled.

6. Click the Confirm button (Figure 5). The Confirmation screen displays (Figure 6).

Figure 6 Confirmation screen.

7. Click Back to Award Homepage (Figure 6). The Alan T. Waterman Award screen displays (Figure 7) with the reference listed with the status of Submitted.

Figure 7 Alan T. Waterman Award screen with the Reference listed with the status of Submitted. View the Entire Reference for the Alan T. Waterman Award

1. Access the Honorary Awards screen (Figure 1) (see Log In to Honorary Awards).
Figure 1  **Honorary Awards** screen. The Alan T. Waterman Award link is circled.

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

![Alan T. Waterman Award screen](image1)

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).

![Reference Form screen](image2)

Figure 3  **Reference Form** screen. The View Saved Reference link is circled.

4. Click **View Saved Reference** (Figure 3). The **View Entire Reference** screen displays with the text you have entered (Figure 4).

![View Entire Reference screen](image3)
Figure 4  View Entire Reference screen.
View the Reference in PDF for the Alan T. Waterman Award

1. Access the View Entire Reference screen (Figure 1) (see View Entire Reference).
Figure 1  View Entire Reference screen. The View PDF link is circled.

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

Figure 2  Reference in PDF format in a new window. The Save and Print icons are circled.

3. Click the Save icon (Figure 2) to save the reference to your computer.
4. Click the Print icon (Figure 2) to print the reference.

National Medal of Science

National Medal of Science Introduction

The National Medal of Science is awarded to individuals "deserving of special recognition by reason of their outstanding contributions to knowledge in the physical, biological, mathematical, engineering, or social and behavioral sciences."

You have the following options in preparing a National Medal of Science:

- View the award considerations
- Find background information on the award
- Get the listing of the award's past winners
- Prepare a nomination for the award

If you have been designated to write a letter of support for a nominee for the National Medal of Science, see Prepare a National Medal of Science Letter of Support.

View Award Considerations for National Medal of Science Award

1. Access the Honorary Awards screen (Figure 1) (see Register for Honorary Awards or Log In to Honorary Awards).
Figure 1  Honorary Awards screen. The National Medal of Science link is circled.

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

Figure 2  National Medal of Science screen. The View Award Considerations link is circled.

3. Click View Award Considerations (Figure 2). The Award Selection Considerations screen displays (Figure 3) with the formal award considerations for the award.
FastLane Help

**Award Selection Considerations**

The Committee has established the following considerations for selection of candidates:

a. The impact of an individual's body of work on the current state of his or her field of science or engineering;

b. Whether the individual's achievements are of an unusually significant nature in relation to the potential effects on the development of thought in his or her field of science or engineering;

c. Whether the nominee has demonstrated unusually distinguished service in the general advancement of science and/or engineering for the nation, especially when accompanied by substantial contributions to the content of science;

d. The recognition of the nominee by peers within his or her community, and whether he or she is recognized for substantial impact in fields in addition to his/her discipline;

e. If the nominee has made contributions to innovation and industry;

f. Whether the nominee has demonstrated sustained influence on educators 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
3801 Eisenhower Avenue
Alexandria, Virginia 22314, USA
Email: info@fastlane.gov
Phone: 703-292-8640
Fax: 703-292-9040

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All nominations must be in conformance with the eligibility requirements stated above. All nominations, recommendations, and references must be submitted no later than 11:59 PM Saturday, October 7, 2017.

[Back]  [Submit Nomination]

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 AWARDS.

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**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).

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.

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.

![Figure 4](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).

   ![Honorary Awards](image)

   **Figure 1** Honorary Awards screen. The National Medal of Science link is circled.

2. On the **Honorary Awards** screen (Figure 1), click National Medal of Science. The National Medal of Science screen displays (Figure 2).
Figure 2  National Medal of Science screen. The Prepare a New Nomination tab is circled.

3. Click the **Prepare a Nomination** tab (Figure 2). The **Instructions for Preparing a Nomination** screen displays (Figure 3) with general instructions for completing a nomination.
Figure 3  Instructions for Preparing a Nomination screen. The View Nomination Form Description link is circled.

4. To see the form requirements, click View Nomination Form Description (Figure 3). The Nomination Form Description screen displays (Figure 4) with a listing of all the components of the Nomination Form.
5. Click the Back button (Figure 4). The Instructions for Preparing a Nomination screen displays (Figure 5).
Instructions for Preparing a Nomination

Background and Eligibility

National Medals of Science are awarded by the President of the United States to individuals deserving of special recognition by reason of their outstanding cumulative contributions to knowledge in the physical, biological, mathematical, engineering, or behavioral or social sciences, in service to the Nation.

Many more nominations are received than awards may be given. Ideal nominations make a strong case for scientific or engineering achievement as well as broader impacts in promoting the progress of science, advancing the national health, prosperity, and welfare; securing the national defense; and other purposes.

Please note the following eligibility guidelines:

- Self-nominations are not eligible, nor are nominations from immediate family members. Teams are not eligible for consideration.
- Deceased nominees are eligible for the award until the fifth anniversary of the day of death.
- Nobel Prize winners are eligible for awards and are evaluated according to the same considerations as those applied to nominees who have not received a Nobel Prize.
- Nominations will be carried over for a period of three years, including the year of nomination. After that time, it is possible to re-nominate the candidate for later consideration, if he or she is still eligible.

The President’s Committee on the National Medal of Science is comprised of experts from a variety of disciplines. Please ensure that the nomination clearly conveys cumulative scientific achievement and broader impacts to a Committee with a wide spectrum of expertise.

Creating and Submitting a Nomination

To proceed to the nomination entry form, you must first familiarize yourself with the award criteria by clicking the “View Award Considerations” button at the bottom of this page. You may also find it useful to review the nomination information requirements (View Nomination Form Description).

There are six steps in the nomination process for the National Medal of Science. Each step consists of a form you must complete. Note that fields marked with an asterisk (*) are mandatory. Once you have completed the form for a step, click “Save and Continue” to advance to the next step. The graphic to the right will be used to guide you through the process. Once a step is successfully completed, the step will be checked.

You may save your work at any time by clicking the “Save” or “Save and Continue” buttons. Once saved, the nomination can be accessed from the National Medal of Science fastLane homepage. Once all of the steps are complete, the “Submit” button will become active. Clicking “Submit” will send your nomination to the National Medal of Science Committee Manager for review of completeness.

You may copy and paste unformatted text from documents on your computer into any text fields you see on the online nomination forms. Please note that copying text from word processing applications such as Microsoft Word may insert characters that are not recognized by standard HTML character sets. To convert a document into ASCII text, you may specify the “text only” option when saving your document.

Note: If you are submitting a nomination on behalf of an organization such as a professional society, please contact Rayna Montrose for specific instructions.

Note: A nomination cannot be changed once it has been submitted. If revisions are required, please contact the Program Manager, Rayna Montrose.

Contact: Rayna Montrose at rmontrose@nsf.gov

Letters of Support

As a nominator, you are responsible for ensuring that letter writers submit their information in a timely fashion. Please inform letter writers of the exact spelling of the nominee’s name and the designated discipline. This will allow the system to automatically link the letters to the nomination.

* To promote the progress of science; to advance the national health, prosperity, and welfare; to secure the national defense; and for other purposes (NSF Act of 1950)

6. Click the View Award Considerations button. The Award Selection Considerations screen displays (Figure 6).
FastLane Help

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  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.
FastLane Help

**Figure 11**  Letter Writers section of the Nomination Form screen. The Save and Continue button are circled.

20. In the Letter Writers section (Figure 11), list at least three letter writers who are not from the nominee’s organization and who are familiar with the technical aspects and broader impact of the nominee’s contributions. For each letter writer, enter the requested information in the appropriate boxes.

You have now completed the Nomination Form. You have these options:
- **Save the nomination to edit it or submit it later**
- **Submit the nomination**

**Submit a Nomination for the National Medal of Science**

1. Access the Nomination Form screen (Figure 1) with the Submit Nomination section open (see Complete the Nomination Form).

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

**Figure 1**  Nomination Form screen. The Submit button is circled.

2. Click the Submit button (Figure 1). The Confirm Award Nomination Submission screen displays (Figure 2).
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.
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).

![Nomination Form screen](image)

**Figure 1** Nomination Form screen open to the Education, Positions Held, Honors and Awards section. The Save button is circled.

2. On the Nomination Form screen (Figure 1), click the Save button. The Nomination is saved, and the Nomination Form screen displays with the section open on which you clicked the Save button (Figure 2). The
Nomination is now listed on the **National Medal of Science** screen (Figure 3) with the status of In Progress.

**Figure 2** Nomination Form screen after the Nomination has been saved.

**Figure 3** National Medal of Science screen with the saved Nomination (circled) listed with the status of In Progress

Submit a Saved Nomination for the National Medal of Science

1. Access the **Honorary Awards** screen (Figure 1) (see [Log In to Honorary Awards](#)).
Figure 1  Honorary Awards screen. The National Medal of Science link is circled.

2. On the Honorary Awards screen (Figure 1), click National Medal of Science. The National Medal of Science screen displays (Figure 2) with the saved nomination in the Work in Progress section.

Figure 2  National Medal of Science screen. The link to the saved nomination is circled.

3. Click the nomination title (Figure 3). The Nomination Form screen displays (Figure 3).
Figure 3  Nomination Form screen. The View Saved Nomination link is circled.

4. Click **View Saved Nomination** (Figure 3). The **View Entire Nomination** screen displays (Figure 4).
5. Click the Submit button (Figure 4). The Confirm Award Nomination Submission screen displays (Figure 5).
Figure 5  Confirm Award Nomination Submission screen. The Confirm button is circled.

6. Click the Confirm button (Figure 5). The Confirmation screen displays (Figure 6) with the message that the nomination has been submitted.

Figure 6  Confirmation screen.

7. Click Back to Award Homepage (Figure 6). The National Medal of Science screen displays (Figure 7) with the nomination listed with the status of Submitted.
Figure 7  National Medal of Science screen with the nomination now listed with the status of Submitted.

View an Entire Nomination for the National Medal of Science

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

Figure 1  Honorary Awards screen. The National Medal of Science link is circled.

2. On the Honorary Awards screen (Figure 1), click National Medal of Science. The National Medal of Science screen displays (Figure 2).
Figure 2  National Medal of Science screen. The link to the saved Nomination is circled.

3. Click the nomination title (Figure 2). The **Nomination Form** screen displays (Figure 3).

Figure 3  Nomination Form screen. The View Saved Nomination link is circled.

4. Click **View Saved Nomination** (Figure 3). The **View Entire Nomination** screen displays (Figure 4). You can edit from this screen also by clicking the **Edit** button for any section.
1. Access the View Entire Nomination screen (Figure 1) (see View Entire Nomination).

Figure 4  View Entire Nomination screen.

View a Nomination in PDF for the National Medal of Science
Figure 1  View Entire Nomination screen. The View PDF link is circled.

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

Figure 2  Nomination in PDF format in a new window.

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

Prepare a Letter of Support for a Nominee for the National Medal of Science

In preparing and submitting a Letter of Support for a nominee for the National Medal of Science, you can conduct the following activities:

- Complete the Letter of Support Form
- Submit a Letter of Support
- Save a Letter of Support
- Edit a saved Letter of Support
- View the entire Letter of Support
- View the Letter of Support in PDF
- Submit a saved Letter of Support

Complete the Letter of Support for the National Medal of Science
To prepare a Letter of Support for the National Medal of Science, you must first register for Honorary Awards. See Register for Honorary Awards.

1. Access the **Honorary Awards** screen (Figure 1) (see Register for Honorary Awards or Log In to Honorary Awards).

![Honorary Awards screen. The National Medal of Science link is circled.](image1)

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

![National Medal of Science screen. The Prepare a New Letter of Support tab is circled.](image2)

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).
Instructions for Preparing a Letter of Support screen. The Begin the Letter of Support link is circled.

6. Click the Begin the Letter of Support button (Figure 5). The Letter of Support Form screen displays (Figure 6) with the Nominee Information section open.

Figure 6 Letter of Support Form screen with the Nominee Information section open. The Save and Continue button is circled.

7. Enter the required information in the appropriate boxes (Figure 6).
8. Click the Save and Continue button (Figure 6). The Letter of Support Form screen displays (Figure 7) with the Letter of Support section open.
9. Browse to and Upload a Letter of Support (Figure 7).

You have now completed the Letter of Support form. You have these options:

- **Save the Letter of Support to edit it or submit it later**

- **Submit the Letter of Support**
Submit a Letter of Support for the National Medal of Science

1. **Access the Letter of Support Form** screen (Figure 1) with the **Submit Letter of Support** section open (see Complete the Letter of Support Form).

   ![Figure 1](image1.png)

   **Figure 1** Letter of Support screen. The Submit button is circled.

2. On the Letter of Support Form screen (Figure 1), click the Submit button. The Confirm Award Letter of Support Submission screen displays (Figure 2).

   ![Figure 2](image2.png)

   **Figure 2** Confirm Award Letter of Support Submission screen. The Confirm button is circled.

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

   ![Figure 3](image3.png)

   **Figure 3** Confirmation screen.

4. Click the **Back to Award Homepage** (Figure 3). The **National Medal of Science** screen displays (Figure 4) with the Letter of Support listed with the status of **Submitted**.
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.
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 8th 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 spanned 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 below 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 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).
1. Access the Honorary Awards screen (Figure 1) (see Log In to Honorary Awards).

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.

Submit a Saved Letter of Support for the National Medal of Science

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.
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).
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 Vannever Bush Award is given annually in recognition of an individual who, through public service activities in science and technology, has made an outstanding "contribution toward the welfare of mankind and the nation."

Access the Honorary Awards screen (Figure 1) [see Register for Honorary Awards or Log In to Honorary Awards].
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.

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

That selection takes you to the Postdoctoral Fellowships and Other Programs screen (Figure 2).
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>
and other programs, including instructions for applying.

<table>
<thead>
<tr>
<th>I am a Sponsoring Scientist</th>
<th>Sponsoring Scientist</th>
<th>Find the information on one of the postdoctoral and other programs and special information for Sponsoring Scientists.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Individual Registration</td>
<td>Applicant</td>
<td>Register with FastLane 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 screen for 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>
</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.

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

05-510 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).
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 display 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.

![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 of the program you are interested in viewing (e.g., **Mathematical Sciences Postdoctoral Research Fellowships**). A screen displays with information on that program.
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).
Figure 4  Change Password screen.

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

Figure 5  E-mail verification message.

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 MG
Department: Journalism
Phone: 7037498555
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? [ ] Years [ ] 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.)

Figure 12 In what capacity have you known the Applicant.

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

Figure 13 Rating for the Applicant.

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.

Figure 14 Indicate level of confidentiality you desire.

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>

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).
18. If you are certain that your rating sheet and letter are what you want to send, select OK (Figure 18) to submit your letter of reference—no further corrections can be made. A screen displays (Figure 19) with confirmation that the reference has been submitted successfully.

Figure 18  Step 2 Letter Uploaded screen with the Letter of Reference listed as saved.
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 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
FastLane Help

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 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>Print Proposal at NSF and Mail</td>
<td></td>
<td>Request NSF to print and mail a proposal to you for your review.</td>
</tr>
<tr>
<td>Create CD at NSF and Mail</td>
<td></td>
<td>Request NSF to make a CD of a proposal and mail the CD to you for your review.</td>
</tr>
<tr>
<td>Edit Reviewer Information</td>
<td></td>
<td>Change your profile information that NSF has on file.</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:

<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 Extension</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](http://www.canvas.com/pdf/filter)
- [PDFWriter](http://www.pdflabs.com/pdf/writer)
- [FrameMaker®](http://www框.net/maker)
- [GhostScript versions prior to 6.5](http://www.ghostscript.com)
- [Hewlett-Packard Intelligent Scanners](http://www框.net/scanners)
- [PhotoShop®](http://www框.net/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
FastLane Help

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 that of a .jpeg image.

PhotoShop

Problem: Concatenation.
Even though PhotoShop is an Adobe Product, the Save as PDF option produces PDF files that FastLane has difficulty accepting, because the option uses the PDFWriter drivers. PDFWriter produces PDF files that are difficult to concatenate.

Possible Solution: Upload as EPS file.
1. If you have created a document in PhotoShop, the best option is choose File -> Save As, and select Encapsulated PostScript (.eps) or PhotoShop EPS (.eps) as the file type. Note that EPS files can contain only one page!
2. Upload the .eps file into FastLane, although the image quality might not be as good as that of a .jpeg image.
**PStill**

**Problem:** Concatenation.  
FastLane has encountered concatenation errors with files produced by the PostScript to PDF converter PStill.

**Possible Solution:** Upload the PostScript file directly.  
We recommend that you upload the PostScript file directly or use Acrobat Distiller or Ghostscript to create the PDF file from the PostScript or Printer file. See [Generate PDF Files](#) for instructions how to use Acrobat Distiller/Ghostscript to create PDF files.

**Configure Adobe Reader for FastLane**

*If your browser is using the Reader as a plug-in, Adobe Reader will not work for FastLane.*

*If you attempt to display or print a PDF document and you encounter a blank page or an error message that says, "An Error Occurred While Trying to Use This Document," it is likely that Adobe Reader is configured as a plug-in. You must delete the plug-in and configure your browser to use Adobe Reader as a helper.***

Contact your organization’s IT support for instructions on configuring Adobe Acrobat as a helper instead of as a plug-in, or review the appropriate Adobe technical document listed in the table below.

<table>
<thead>
<tr>
<th>Operating System</th>
<th>Browser</th>
<th>URL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Windows</td>
<td>Internet Explorer or AOL</td>
<td><a href="http://www.adobe.com/support/techdocs/331025.html">http://www.adobe.com/support/techdocs/331025.html</a></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.
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).

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 screen. This screen continues to refresh until the upload is completed.](image)

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.

![Proofread PDF button is circled.](image)

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]
FastLane Help

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 up updating your Internet Explorer, go to the [Microsoft Update Site](#).

- **Mozilla Firefox**
  For information on downloading Firefox, go to the [Download Firefox Site](#).

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

<table>
<thead>
<tr>
<th>Browser Version</th>
<th>Issue</th>
<th>Best Practice</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internet Explorer</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>5.9–5.5</td>
<td></td>
<td>2. Uncheck the &quot;Display PDF&quot;</td>
</tr>
</tbody>
</table>
browser because of issues in the ActiveX version of the Acrobat Reader plug-in | in Browser” checkbox under Edit-- > Preferences-- > General

| Internet Explorer 7.0 | Issues with FastLane Interactive Panel System may occur | Update Internet Explorer with Windows Update. |

Mac Operating System

If you are using a Mac operating system, then the following web browsers work best when using Fastlane:

- **Mozilla Firefox**  
  For information on downloading Firefox, go to the [Download Firefox Site](#)  
- **Safari 5.0**  
  For information on downloading Safari, go to the [Download Safari for Mac Site](#)

The table below shows best practices when using other web browsers, on a Mac system, while accessing FastLane.

<table>
<thead>
<tr>
<th>Browser Version</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:**  
  - With Windows XP running Internet Explorer 8.0  
  - With Windows XP running Firefox 17.0

- **Dragon 11.5:**  
  - With Windows XP running Internet Explorer 8.0  
  - With Windows 7 running Internet Explorer 9.0
Although FastLane may be utilized with other accessibility software, the ones represented above are the only ones we can confirm are supported. Additionally, we can confirm that Dragon 11.5 does not support FireFox 17.0 running on Windows XP or Windows 7.

**File Upload Instructions**

### General

These instructions are valid whether you are uploading a new file or overwriting an existing file.

You will perform three general steps to upload your file(s):

1. **Select and upload the file.**
2. **Proofread the uploaded file.**
3. **Publish the file or, if errors occurred, resubmit (after making corrections).**

### Select and Upload the File

To select the file and upload it, follow the steps listed below.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</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><img src="image" alt="Browse..." /></td>
<td><img src="image" alt="File Upload" /></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><img src="image" alt="Open" /></td>
<td><img src="image" alt="C:\My Documents$Training Int" /></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:
PDF files can be read on different platforms (such as Windows, Macintosh, and Unix).

- The PDF format helps ensure that the file appears as the author intends.
- NSF can ensure that the PDF file meets FastLane formatting requirements.

### Upload Documents Directly to FastLane in Many Formats

FastLane recommends that you upload your documents in their original format. See [Acceptable Formats for FastLane](#) for the many formats that FastLane now accepts for uploaded files and [Upload a File](#) for instructions on how to upload a document. [Embed the fonts](#) used in your document before uploading.

### Create and Upload a PDF Document

It is still acceptable to create your own PDF files for uploading, if you wish, as long as the PDF documents meet NSF formatting requirements.

Proposals often contain images, graphics, equations, and various character sets (Greek letters, for example). To enable reviewers and NSF staff to read your file as you intend it to read, your PDF file must be complete. This means that it must contain embedded in it all the non-standard font characters that you used.

To create a PDF file that meets NSF formatting requirements, see the following:

- [Software Requirements for Creating PDF Files](#)
- [Ensure Your PDF Files Meet NSF Formatting Requirements](#)
- [Important Don'ts](#)

See [Generate PDF Files](#) to see how to create PDF files from various platforms.

**Note:** To ensure your PDF files meet NSF formatting requirements, please make sure that all security permission for your PDF files are set to No Security before you upload your PDF file to FastLane. Failure to do so causes problems with the viewing and printing of your proposal. FastLane is blocking PDF files that have security permissions enabled. See [Important Don'ts](#).

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### Software Requirements for Creating PDF Files

The following software is acceptable for creating PDF files that meet NSF formatting requirements:

- Adobe Acrobat Professional or Standard Version 5 or higher
  - **Note:** FastLane now supports Adobe Acrobat Distiller Version 7
- Ghostscript (Version 6.5 or higher)
- Microsoft Word
- WordPerfect

See [Important Don'ts](#) for information on software and settings that will not function.

### Important Don'ts

**Do Not Use These PDF Producers**

These PDF producers may generate fine standalone documents, but create difficulties for embedding fonts and for file concatenation:

- Canvas/Deneba PDF Filter
- Dvipdf(m)
- FrameMaker
- Ghostscript versions before 6.5
- Hewlett-Packard Intelligent Scanners
- PhotoShop
- PStill

For more information, see [Blocked PDF Producers](#).

**Do Not Use Adobe Acrobat Encryption or Security Settings**
Modern versions of Adobe Acrobat allow users to create security settings on PDF files. These settings negatively affect the ability of NSF Program Officers and reviewers to properly access and view your files.


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

For more information on Ghostscript, see [http://www.cs.wisc.edu/~ghost/](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 File in Windows

To generate a PDF, you must have installed Adobe Acrobat Standard or Professional Version 5 or higher.

First, embed the fonts in your word-processing document.

1. Open the word-processing file you want to convert to PDF.
2. Select File Print. The Print box displays.
3. In the Name box, select Acrobat Distiller (for Version 5) or Adobe PDF (for Version 6 or higher).
4. Click OK. The document displays in a new window as a PDF file.
5. Select File Save as PDF. The Save as box displays.
6. Give the file a name and select the directory you want to store it in.
7. Click Save. The PDF file is now ready for uploading to FastLane. See Upload a File.
Generate a PDF File for Macintosh

To embed the fonts in your document, FastLane recommends that you first turn a Word or other word-processing document into a PostScript file and then convert the PostScript file to a PDF for uploading to FastLane.

1. Open your word-processing document.
2. Select File → Print.
3. In the dialogue box, change Copies and Pages to Output Options.
4. Click Save as file. The Save As box displays.
5. In the dropdown menu, select PostScript.
6. Click Save.
7. Close out the word-processing file.
8. Double-click the PostScript file icon or filename in the folder that you saved it to. A box displays stating the PostScript file is being converted to PDF. When the conversion is finished, the converted document displays as a Preview.
9. In the Preview, select File → Export.
10. In the Format drop-down box, select PDF.
11. Click Save.

Your original document is now in PDF with fonts embedded.

Generate PDF Files With Ghostscript

Instructions and the current version of Ghostscript may be found at the GhostScript Home Page.

Go to the Ghostscript website for more information on Postscript to PDF.

Suggestions

Remember when using Ghostscript to:

- Use Type 1 fonts.
- Embed the fonts.
- Set the output resolution at a sufficient level for your included images and graphics.
- Since ps2pdf will convert your PostScript file to PDF within Ghostscript, use the following settings:
  - dMaxSubsetPct=100
  - dCompatibilityLevel=1.2
  - dSubsetFonts=true
  - dEmbedAllFonts=true

Generate PDF Files With WordPerfect

NSF highly recommends that the WordPerfect file be uploaded directly to FastLane.

WordPerfect 9 or higher, part of WordPerfect Office 2000, has a Publish to PDF function that will bypass the need for Adobe Acrobat Distiller or GhostScript. This function will embed WordPerfect fonts.

Security and Privacy
**NSF FastLane Security and Privacy**

**Introduction**

In order to protect the confidentiality of information, the National Science Foundation (NSF) restricts access to most FastLane features to authorized users.

Upon registering with the FastLane system, NSF requires you to establish your identity with unique identifiers: your last name and a password.

NSF will also assign you an **NSF ID**. An NSF ID is a unique numerical identifier assigned to FastLane users by NSF.

Then, to verify the identity of an authorized user accessing the FastLane system, each time you access certain FastLane subsystems you will be required to enter your three authenticating tokens: again, your last name, a password, and your NSF ID.

**Unauthorized Access**

FastLane is an NSF federal computer system. Unauthorized attempts to gain access to or modify any information stored on this system, to defeat or circumvent security features, or to use this system for reasons other than its intended purposes are illegal and may result in disciplinary action, criminal prosecution, or both.

To protect the integrity of this system and the confidentiality of information stored on it, NSF may monitor any activity on the system and retrieve any information stored on the system.

**Personal Information Disclosure**

Within FastLane, wherever NSF requests information, you will have access to an explanation of why NSF is requesting the information and how the information will be used.

For more information on NSF’s FastLane privacy and security policies, see the following:

- Information Collection, Release, and Dissemination
  - Release of Grantee Proposal Information
  - Release of Information by NSF
- Privacy Act and Public Burden Statements
- GRFP Security and Privacy

**Use of NSF ID and Social Security Numbers**

**NSF ID**

The NSF ID is a unique numerical identifier assigned to FastLane users by NSF. It is a random nine-digit number beginning with three zeroes.

The NSF ID will be used throughout FastLane as a login ID and identification verification.
Social Security Numbers (SSN)

SSN submission will only be requested where it is necessary for business purposes, e.g., financial reimbursement. SSN is solicited under NSF Act of 1950, as Amended.

In areas that do not require SSNs for a business need, FastLane customers will use their NSF ID, assigned to them by NSF in place of SSNs.

The SSN used by the FastLane System is not printed on any reports and is available through online screens only to FastLane users who have an established need to view the SSN.

FAQs

FastLane FAQs Introduction

FastLane Frequently Asked Questions (FAQs) are alphabetized and categorized and cross-referenced into the different areas to make it easier to find an answer to a common question. Some FAQs are listed in more than one area. The areas are as follows:

- Accessing FastLane
- Authorized Organizational Representative Functions
- FastLane-Related Proposal & Award Policies & Procedures Guide (PAPPG) FAQs - Effective January 14, 2013
- Graduate Research Fellowship Program (GRFP) for:
  - Applicant
  - Reference Writers
  - Fellows
  - Fellows Abroad
  - Coordinating Officials
- Interactive Panel System (IPS)
- Notifications and Requests
- NSF ID
- Principal Investigator (PI) Functions
- Project Reports System
- Proposal Preparation
- Sponsored Project Office (SPO) Functions
- Technical
  - General
  - Printing
  - Proposal Preparation

If you do not find the answer to your question in this list or any other FastLane documentation, please contact the FastLane Help Desk for assistance. If you find an error or discrepancy in any of the FAQs, please notify the FastLane Help Desk.

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

A Co-PI can access a proposal after you have added their name and National Science Foundation Identification Number (NSF ID) to the Cover Sheet Form of a proposal. See [Add a Co-PI to a Proposal](#) for instructions.

NSF permits only four Co-PIs per proposal. Co-PIs can be from your organization or another organization.

**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 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?**
FastLane Help

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.

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**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?**

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**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?

Yes.

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:

- Allow SPO to view proposal
- Allow SPO to view and edit proposal
- Allow AOR to edit, and submit 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?

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?

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

How do I print a copy of my completed report?

How can I change my email, phone, and fax numbers?

How do I add a Co-PI to the proposal?

I want to add more than four Co-PIs to my cover sheet. Can I do this?

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

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

**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?
- Can you edit the Table of Contents?
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?

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 do I exit the FastLane Proposal Preparation application?

How will my Sponsored Project Office (SPO) know when I have allowed SPO access to the proposal?

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

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

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) 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
FastLane Help

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 or 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 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 to 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.
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.

Technical FAQs Introduction

Print the contents of the Technical FAQs book.

Technical FAQs are organized into four groups:

- General
- Printing
- Proposal Preparation

All Technical FAQs are listed below.

General
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?

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?
What 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, 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 Help

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 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 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 downloads the Proposal Status information to the FastLane 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.

GRFP User Guides

GRFP FAQs
Graduate Research Fellowship Program FAQs
Introduction

GRFP FAQs for Applicants

Reference GRFP Application FAQs on the Graduate Research Fellowship Program home page.

GRFP FAQs for Reference Writers

What type of information should Reference Writers include in their GRFP reference letter?

I have been requested to provide a reference letter for a Graduate Research Fellowship applicant. I have lost the e-mail from FastLane on how to log in as a reference writer. Who can help me retrieve my login information?

I lost my password for the GRFP application. How can I get it?
I have been requested to provide a reference letter for a Graduate Research Fellowship applicant. I have lost the e-mail from FastLane. I would like another copy of the e-mail. Who should I ask to resend the e-mail?

I am unable to log in using the Temporary Password I received via e-mail.
I did not receive the e-mail nominating me to serve as a reference writer or the e-mail containing my temporary password.

1. What type of information should Reference Writers include in their GRFP reference letter?
NSF appreciates your input in the selection process for the NSF GRFP Graduate Research Fellowships. Letters of references play a crucial role in the review and selection of fellowship awardees. Complete information regarding the NSF GRFP can be found in the Program Announcement. Reference letters should comply with the format guidelines below.

Reference Letter Format Guidelines:
Letters should be 2 pages or less. The system will not allow you to upload a letter that exceeds 2 pages.
Letters should be written using standard 8.5” x 11” page size, 12-point, Times New Roman font or Computer Modern (LaTeX) font, and 1” margins on all sides
Letters should be single spaced or greater – character spacing should use normal (100%) single-line space option
Letters should be submitted on professional letterhead
Letters should be signed, and include the professional title of the reference writer, department, and institution

In your letter, please address the following items:
How long have you known the applicant, and in which capacity? Please note that the more specific (as opposed to generic) a letter you provide, the better reviewers can evaluate the candidate. If you are the candidate’s research supervisor, you must comment on the originality of his/her research statement, and the role, if any, you had in assisting the student with this application.
What is the applicant’s potential for contributing to a globally-engaged STEM workforce? Please include statements about the applicant’s academic potential and, if applicable, prior research experiences, proposed research, and other information that will enable review panels to evaluate the application according to the NSF Merit Review Criteria. Other information may include professional skills and abilities such as analytical, written and oral communication, interpersonal, teamwork, and leadership skills, initiative, integrity, maturity, respect for others and trustworthiness.

What are the Intellectual Merit and Broader Impacts demonstrated by the applicant? The application will be evaluated on the basis of the two National Science Board approved merit review criteria, Intellectual Merit and Broader Impacts. Please address both the Intellectual Merit and Broader Impacts of the applicant in your letter.
Please refer to Section IV of the Solicitation for more information about the Review Process and Broader Impacts.
Reviewers evaluating applications submitted to the Graduate Research Fellowship Program may consider the following with respect to the Intellectual Merit Criterion: the potential of the applicant to advance knowledge based on totality holistic review of the content in the application, including the two statements, the strength of the academic record and accomplishments, and the reference letters.

Reviewers may consider the following with respect to Broader Impacts Criterion: the two statements, personal, professional, and educational experiences, the future plans and prior accomplishments in the integration of research and education, the potential for future broader impacts, and the reference letters.

I have been requested to provide a reference letter for a Graduate Research Fellowship applicant. I have lost the e-mail from FastLane on how to log in as a reference writer. Who can help me retrieve my login information?

On the Reference Writer login screen, click on Create a new Password to setup a new password. If you have trouble using the Create new password screen, contact the GRF Operations Center 1-866-673-4737 (office hours: Monday-Friday, 8:30 am - 5:30 pm ET) or e-mail info@nsfgrfp.org

I lost my password for the GRFP application. How can I get it?

On the Reference Writer login screen, click on Create a new Password to setup a new password. If you have any trouble using the Create new password screen, contact the GRF Operations Center at 1-866-673-4737
I have been requested to provide a reference letter for a Graduate Research Fellowship applicant. I have lost the e-mail from FastLane. I would like another copy of the e-mail. Who should I ask to resend the e-mail?

Ask the applicant to delete and re-enter you as a Reference Writer. The system will re-enable the ‘Send E-mail’ option if the applicant deletes an existing entry from the Reference Writers list and re-adds the Reference Writer information.

I am unable to log in using the Temporary Password I received via e-mail.

If you have received your temporary password and are unable to login to the FastLane GRFP Reference Writer module, check the following:

Check your e-mail address. Check to confirm you are using the same e-mail address provided by the Applicant when attempting to login. The e-mail address provided by the Applicant can be found in the body of the e-mail you received with your temporary password. An exact e-mail address is crucial to matching the reference writer and the applicant in the FastLane GRFP Application Module.

Check the temporary password. Record the temporary password and type it into FastLane manually rather than copying and pasting.

Ensure you are using the most recent Temporary Password received. Occasionally, a user will inadvertently create a password multiple times. If this occurs, use the temporary password in the most recent e-mail you received.

I did not receive the e-mail nominating me to serve as a reference writer or the e-mail containing my temporary password.

Please check the following if this occurs:

Confirm your e-mail address with the applicant. Check to ensure that the e-mail address the applicant entered for you is accurate. If there is a typo or if the applicant needs to change the e-mail address, the applicant can edit the Reference Writer record and resend the nomination e-mail. An exact e-mail address is crucial to matching the reference writer and the applicant in the FastLane GRFP Application Module.

Check SPAM folders. Check your SPAM or Trash folder to ensure that the e-mail did not end up in one of those folders inadvertently.

Use an alternate e-mail address. It is possible that your e-mail domain is rejecting the e-mail and not allowing delivery. In this case, provide an alternate e-mail address to the applicant and the applicant will be able to edit your Reference Writer record and re-send the nomination e-mail.

The applicant may no longer need your letter. Please check with the applicant.

GRFP FAQs for Fellows

I have been awarded a Fellowship under the NSF GRFP. How is my Fellowship going to be administered by NSF?
What do I need to do to get started?
I have been awarded a Fellowship under the NSF GRFP. Who can help me with various questions related to the Fellowship?
I have been awarded a Fellowship under the NSF GRFP. How do I log into NSF GRFP?
I have a Fellowship under the NSF GRFP. My email address has changed. How can I update my email address in the system?
I have a Fellowship under the NSF GRFP. I forgot my login ID. How can I look it up?
I have a Fellowship under the NSF GRFP. I forgot my password. What should I do?

I have been awarded a Fellowship under the NSF GRFP. How is my Fellowship going to be administered by NSF? What do I need to do to get started?

NSF uses the FastLane Graduate Research Fellowship Program System to administer the fellowships. As a fellow, you will manage your fellowship activities through the same online system with the same login account that you use for completing your application to the Graduate Research Fellowship Program. A number of documentations, including a User Guide, are located on the left side of the screen when you log in. The guide provides step-by-step instructions on how to update your Fellowship Status and request changes. Please read the manual carefully before using the system.

I have been awarded a Fellowship under the NSF GRFP. Who can help me with various questions related to the Fellowship?

Please send fellowship-related questions to the Coordinating Official (CO) at your affiliated institution. The Institution Directory is located on the left side of the screen when you log into FastLane’s Graduate Research Fellowship Program (GRFP) link. Section 3 of the Information for Graduate Research Fellows Guidelines, located on the left side of the screen after you log into Fastlane/GRFP, provides more detailed information. The CO is the first person you should contact with Graduate Fellowship-related questions. If your CO is unable to help, you can contact the NSF GRFP office directly.

I have been awarded a Fellowship under the NSF GRFP. How do I log into NSF GRFP?

NSF GRFP is the Graduate Research Fellowship Program link on the FastLane homepage. Log in using the same login account that you had used to submit your fellowship application.

I have a Fellowship under the NSF GRFP. My email address has changed. How can I update my email address in the system?

Log into the Graduate Research Fellowship application, and click the “Update My Profile” link to update your primary and secondary email addresses. If you have difficulty logging in and need to update your primary email address, please use the Forgot Password to reset your password directly. If you still have difficulty, please contact the FastLane Helpdesk at 1-800-673-6188 or email fastlane@nsf.gov.

I have a Fellowship under the NSF GRFP. I forgot my login ID. How can I look it up?

You can use the Forgot Username link to retrieve your username. You may also contact your school’s coordinating official to look up your username. Or contact the FastLane HelpDesk at 1-800-673-6188 or email fastlane@nsf.gov.

I have a Fellowship under the NSF GRFP. I forgot my password. What should I do?

In the Login box for GRFP, click Forgot Password. The system will email you a temporary password. Once you receive the temporary password, return to the login page and enter your user ID and temporary password. You can also reset your password directly on the Forgot Password screen.
GRFP FAQs for Coordinating Officials

How can I view Grants Roster report for the upcoming Fellowship Year?
When do I need to approve a Tenure Change Request?
How do I view my Institutions Financial Summary?

How can I view my Grants Roster report for the upcoming Fellowship Year?

Detailed instructions for viewing a Grants Roster report can be found in the Coordinating Official System Guide.

When do I need to approve a Tenure Change Request?

Fellowship Status Change Requests needing approval will appear in the Coordinating Official Task List. Detailed instructions for Fellowship Status Change Requests can be found in the Coordinating Official System Guide.

How do I view my Institutions Financial Summary?

Detailed instructions for viewing your Institution’s Financial Summary can be found in the Coordinating Official System Guide.

Applicant User Guide Applicant User

Guide

Reference the Program Solicitation to learn about Application Preparation.

Supported File Formats

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.

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>
<tr>
<td>.rtf</td>
<td>Rich Text Format</td>
</tr>
<tr>
<td>.txt</td>
<td>Text file</td>
</tr>
</tbody>
</table>
**File Uploading Instructions**

To upload a file:

1. Click the **Browse** button to find the location of the file.
2. Select the file and click the **Open** button.
3. Click the **Upload** button to begin the upload process.
   a. The **PDF Conversion/Compliance Check** screen is displayed. Please be patient, this process may take a few minutes. Every 15 seconds this page will refresh to check the status of your file.
   b. During the upload process, your file is converted to a PDF. After successful conversion, the **File is ready for proofreading** screen is displayed.
4. Click the **Proofread PDF** button to proofread the converted file.
   a. A new window is opened to display the PDF file. Pay special attention to check that all figures, graphics, tables, margins, page breaks, and other special formatting options have been accurately preserved.
   b. Close the window.
   c. The **Proofreading Complete** screen is displayed.
5. Click the Accept button to accept the converted PDF file (However, if you detected any problems in the PDF file, you can cancel the upload by clicking the Cancel button. You may then correct the errors and resubmit the corrected version of your document.)

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**NSF Administrator User Guide  NSF**

**Administrator User Guide  Understanding**

**Your Task List**

Your task list area has two different sections. The left hand side of the list contains tasks that are pending your approval or that are currently due. These actions include approving tenure requests, approving travel requests, certifying awards, processing payment enrollments, generating grants roster reports, and approving Program Expense Reports.

The right hand side of the task list contains features that you may use and access at anytime. This functionality includes system administration features, viewing fellows reports, viewing analytical reports, and viewing/updating fellow information.

**Figure 1: Admin Task List Screen**

The list of all possible tasks that may appear in your task list and a description of each is described below:

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approve Fellowship Status Requests</td>
<td>The Approve Fellowship Status Requests task must be completed each time a fellow has submitted a tenure, organization, or field of study change request that requires your approval. The number of requests pending your approval is displayed next to the task.</td>
</tr>
<tr>
<td>Approve/Disapprove Travel Requests</td>
<td>The Approve Travel Requests task must be completed each time a fellow has submitted a travel request that requires your approval. The number of requests pending your approval is displayed next to the task. Travel Requests are no longer permitted as of the 2011 - 2012 Fellowship year.</td>
</tr>
<tr>
<td>-----------------------------------</td>
<td>--------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Verify Fellows Abroad Enrollment</td>
<td>The Verify Fellows Abroad Enrollment task enables the Administrator to verify that the requesting fellow is enrolled at an institution abroad. Verification will come from the fellow’s institution’s bursar’s office in the form of an email or other correspondence. The number of fellows requiring enrollment verification is displayed next to the task.</td>
</tr>
<tr>
<td>View/Process Fellows Abroad</td>
<td>The View/Process Fellows Abroad task enables the Administrator to View/Process the Fellows Abroad Starting Certificates, Payment Enrollment Forms, Termination Certificates and Travel Certificates. The number of certificates/forms that require processing is displayed next to the task.</td>
</tr>
<tr>
<td>Approve/Disapprove Program Expense Reports</td>
<td>The Approve Program Expense Reports task must be completed when a CO submits an adjusted Program Expense Report for your approval. This module allows you to review the original and the adjusted report and then to approve or disapprove the report. The number of requests pending processing is displayed next to the task. You may also use this module to view previous year Program Expense Reports.</td>
</tr>
<tr>
<td>Approve/Disapprove Grants Roster Reports</td>
<td>The Approve Grants Roster Reports task must be completed when a CO submits a Grants Roster Report for your approval. This module allows you to review the original and the adjusted report and then to approve or return the report with adjustments. The number of requests pending processing is displayed next to the task. Grant Roster reports are no longer submitted as of June 2011.</td>
</tr>
<tr>
<td>System Administration</td>
<td>The System Administration area contains multiple capabilities, including the ability to manage costs, administer email notifications, and manage task dates. This functionality is available at all times.</td>
</tr>
<tr>
<td>View Fellowship Year Fellows Report</td>
<td>The View Fellowship Year Fellows Report task is available at all times. This task allows you to view a current Report of all fellows at an Organization for the current fellowship year.</td>
</tr>
<tr>
<td>Task</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>View Analytical Reports</td>
<td>The View Analytical Reports task allows you to view various reports for the GRFP program including activity report statistics and statistical fellow reports and also to generate ad-hoc reports. The fellow reports that are included in this area are the Award Acceptance and Decline Report, the Fellowship Status Plans Declaration Report, the WENGS/WICS Report, the Organization Report, the Fellowship Status Report, the Fellow Abroad Report, and the Retiree Report.</td>
</tr>
<tr>
<td>View/Edit Fellow Information</td>
<td>The View/Edit Fellow Information task is available at all times. This task allows you to view/edit information on all GRFP fellows. You may use this feature to view the fellow’s profile, tenure records, previous tenure change requests, and previous travel requests. You may also use this area to make changes to the fellow’s information.</td>
</tr>
<tr>
<td>View Award Certification</td>
<td>The View Award Certification Forms task is available at all times in your General Administrative task list. This task allows you to view the Award Certifications that were accepted by the awardees for a specific fellowship year.</td>
</tr>
<tr>
<td>Forms</td>
<td></td>
</tr>
<tr>
<td>Edit Applications</td>
<td>The Edit Applications task is available at all times. This task allows you to edit an application regardless of the application’s status (submitted or unsubmitted).</td>
</tr>
<tr>
<td>View Program Expense Reports</td>
<td>The View Program Expense Reports link allows is available at all times. This task allows you to search for and view Program Expense Reports submitted by GRFP Officials. This task allows you to view the version history of submitted Program Expense Reports.</td>
</tr>
<tr>
<td>Track CO Activities</td>
<td>The Track CO Activities task is available at all times. This task allows you to view reports of requests pending CO approval.</td>
</tr>
<tr>
<td>View Grants Roster Report</td>
<td>The View Grants Roster Report task is available at all times. This task allows you to view the current Grants Roster Reports for any Organization as well as historical Grants Roster Reports beginning with the 2008-2009 Fellowship Year.</td>
</tr>
<tr>
<td>View/Edit Award Financial</td>
<td>The View/Edit Award Financial Summary module allows you to view the Award Financial Summary for a given institution for the current Year and up to the past three active or expired awards. From this view you will be able to view real-time Financial Summary information and submit Program Office Adjustments.</td>
</tr>
<tr>
<td>Summary</td>
<td></td>
</tr>
<tr>
<td>Upload Applicant References</td>
<td>The Upload Applicant References task is available at all times. This task allows you to upload a Referee’s Reference Letter for an applicant.</td>
</tr>
</tbody>
</table>
The View Application Change Log task is available at all times. This task allows you to view the applicant’s application change log.

The View Application and Package Status task is available at all times. This task allows you to view application package status and to view/print applications from the current application year (including uploaded letters of reference). This task also allows you to view/print submitted applications from previous application years.

Managing Fellowship Status Requests

Fellows may submit tenure change requests for their current year’s tenure at any time during the year. Fellows may also request tenure changes while they are accepting their award or declaring their tenure plans for the next year. A tenure request includes changes to the fellow’s organization, field of study, or Fellowship Status. When a fellow submits a tenure request, you will be required to approve or disapprove the request. You also have the ability to request more information on the request, if needed.

Once a fellow’s request has been submitted and approved by his/her CO (if applicable), you will be notified via email that a request has been submitted for your approval. After receiving the email notification, you may log into the GRFP System to review and take action on the request. Your task list will display the number of tenure requests pending your approval next to the Approve Fellowship Status Request link.

Approving Fellowship Status Change Requests

When you select to approve tenure change requests, a list of all pending requests is displayed. Once you select a request to approve, the details of the request will be displayed and you will have the option to approve the request, disapprove the request, or request more information.
Figure 3: Fellowship Status Change Request Details

When you adjust/approve a request, you will be asked to adjust the fellow’s tenure records to reflect the changes that are approved. Depending on the type of tenure change you are approving, you will need to either edit the current year’s Fellowship Status record for the fellow or add a new Fellowship Status record for the fellow by pressing the Add New Tenure Record button or pressing the Edit link.

NOTE: Selecting the Fellow ID link in the Current Fellow Status bar will open a new browser window displaying the Fellow's detailed Fellowship Status record. You may view and edit historical tenure information from the Fellow’s detailed Fellowship Status record.

Figure 4: Tenure Adjustment Screen

NOTE: A new Fellowship Status record cannot be created for an awardee until the awardee has accepted their award.

The Approve Tenure Change Screen appears below. You are able to modify all of the fields in the Fellowship
The table below describes the process for adjusting tenure records for each type of tenure changes request.

<table>
<thead>
<tr>
<th>Type of Change</th>
<th>Adjustment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization</td>
<td>Add a new Fellowship Status record for the current year with the new organization. The current Fellowship Status record for the previous organization should be edited to reflect the change to the months of tenure at that organization and the costs associated with attending that organization.</td>
</tr>
<tr>
<td>Fellowship Year</td>
<td>Edit the fellow’s current year Fellowship Status record to reflect the new field of study.</td>
</tr>
<tr>
<td>Field of Study Change</td>
<td>Add a new Fellowship Status record with the new field of study and the Fellowship Status that the fellow has requested for the next year.</td>
</tr>
<tr>
<td>Fellowship Status</td>
<td>Edit the current Fellowship Status record to reflect the change in Fellowship Status. The specifics of how to change the Fellowship Status record details are at the discretion of NSF (i.e. how many months on tenure, costs, etc.)</td>
</tr>
<tr>
<td>Status Start Date</td>
<td>Add the date where the Fellowship Status becomes effective (DD/MM/YYYY).</td>
</tr>
<tr>
<td>Fellowship Year Start</td>
<td>Choose the tenure start type (Fall or Summer).</td>
</tr>
<tr>
<td>End Month</td>
<td>Choose the month in which the fellow’s Fellowship Status changed.</td>
</tr>
<tr>
<td>Months on Tenure</td>
<td>Enter the number of months that the fellow was on tenure prior to the Fellowship Status change for the current year.</td>
</tr>
<tr>
<td>Months on Reserve</td>
<td>Enter the number of months that the fellow will be on or has been on Reserve.</td>
</tr>
<tr>
<td>Months Forfeited</td>
<td>Enter the number of months that the fellow will forfeit once his/her Fellowship Status changes.</td>
</tr>
<tr>
<td>-----------------</td>
<td>------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Reserve Verified</td>
<td>Choose Yes or No to indicate whether or not the fellows reserve was verified.</td>
</tr>
<tr>
<td>Satisfactory Rating</td>
<td>Choose Yes, No, or Not Rated to indicate whether or not the fellow had received a Satisfactory Rating.</td>
</tr>
<tr>
<td>Stipend Used</td>
<td>Enter the Stipend Amount used by the fellow prior to his/her Fellowship Status change.</td>
</tr>
<tr>
<td>COE Used</td>
<td>Enter the COE Amount used by the fellow prior to his/her Fellowship Status change.</td>
</tr>
<tr>
<td>Travel Used</td>
<td>Enter the Travel Amount used by the fellow prior to his/her Fellowship Status change. Note, Travel Requests were no longer permitted as of the 2011 - 2012 fellowship year.</td>
</tr>
<tr>
<td>Comments</td>
<td>Enter any comments that you feel are appropriate to the adjustment/addition to the fellow’s Fellowship Status record.</td>
</tr>
</tbody>
</table>

Once you have made the appropriate adjustments to the fellow’s Fellowship Status record(s), you may complete the approval of the request. After you have approved the request, it is no longer available in your pending request list. In addition, an email will be sent to the fellow indicating that the request has been approved and the changes will be reflected in his/her tenure details.

**Disapproving Fellowship Status Requests**

In some cases, it may be necessary to disapprove a change a fellow has requested. If you select to disapprove the tenure change request, the system will prompt you to enter a disapproval reason.
Once you have entered the disapproval reason, an email will be sent to the fellow and COs (when applicable) alerting them that the change request has been disapproved and the reason for the disapproval. After the request has been disapproved, it is no longer available in your pending requests list.

**Requesting More Information on Fellowship Status Requests**

If a fellow did not enter enough information for you to approve the change request or if you have questions regarding the change request, you may ask for more information from the fellow. When you select to request more information, the system will prompt you to enter the information request. It is recommended that in addition to the request, you also provide the fellow with the contact information he/she should send the response to (i.e. your phone number, email address, or other contact method). Once you have submitted the information request, an email will be sent to the fellow. The fellow’s change request will still be available in your pending requests list until you choose to approve or disapprove the request.
Managing Additional Funding Opportunities Requests

Starting with the 2013-2014 fellowship year, Fellows can submit requests for additional funding opportunities. When a fellow submits an additional funding opportunity request, you will be required to approve or disapprove the request. Additional funding opportunity requests submitted by fellows are first sent to COs for approval before being forwarded to NSF for approval. These items will be available in your task list once the CO has approved the request. Your task list will display the number of funding opportunities requests pending your approval next to the Approve Additional Funding Opportunities Request link.

Figure 8: Approve Additional Funding Opportunities Request Link
When you select to approve Additional Funding Opportunities Requests, a list of all pending requests is displayed. Once you select a request to approve, the details of the request will be displayed.

![Figure 9: Approve Additional Funding Opportunities Request Screen](image)

Once you have reviewed and approved the request, an email will be sent to the fellow and the fellow’s Coordinating Officials informing them that the additional funding opportunities request has been approved. The fellow’s record will also be updated to indicate that he/she has used received the additional funding opportunity. After you have approved the request, it will no longer appear in your pending requests list.

Note: Selecting the Fellow ID link will open a new browser window displaying the Fellow’s detailed Fellowship Status record. You may view and edit historical tenure information from the Fellow’s detailed Fellowship Status record.

**Disapproving Additional Funding Opportunities Requests**

In some cases, it may be necessary to disapprove an additional funding opportunities request that a fellow has submitted. If you select to disapprove the request, the system will prompt you to enter a disapproval reason. Once you have entered the disapproval reason, an email will be sent to the fellow alerting him/her that the request has been disapproved and the reason for the disapproval. After the request has been disapproved, it is no longer available in your pending requests list.
Managing Grants Roster Reports

Prior to the 2011-2012 fellowship year, after the fellows and new awardees have declared their tenure plans, the Coordinating Officials at each Organization was able to adjust and/or submit a Grants Roster Report. Once the CO has submitted the Grants Roster report, you will need to review the report and approve or adjust fellow records and return the report. In addition, the Grants Roster report will contain an attached Financial Summary that has been verified by the CO. The financial summary details the balance of the Organization’s current GRF Award as well as the cumulative expenses recorded against this Award. This information combined with projected expenses for the upcoming year (as per the Grants Roster Report) are used to calculate a Maximum Budget Request. This Maximum Budget Request is the Organization’s projected need for funding for the upcoming Fellowship Year.

This functionality is available through using the Approve Grants Roster Reports link in your financial task list. The link also contains a number next to it which indicates the number of reports you have awaiting your approval.

PLEASE NOTE: Institutions will no longer submit the Grant Roster Report after the 2010 - 2011 Fellowship year. These functions will only be available for Grant Roster Reports submitted for the 2010 - 2011 fellowship year or
FastLane Help

prior years.

Figure 13: Approve Grants Roster Link

In addition to approving Grants Roster reports, you may also view current and previous years Grants Roster reports by selecting the View Grants Roster Reports link in your General Administration task list.

Figure 14: View Grants Roster Reports Link

Approving Grants Roster Reports and Financial Summaries

Select the Approve Grants Roster Reports link, The list of reports pending your approval will be displayed.

Select the link next to the report you wish to view

Figure 15: Approve Grants Roster Report Screen

The Grants Roster Report will display. Any fellow records that the Coordinating Official has adjusted will have a Y in the Adj column.
If adjustments have been made to the submitted Grants Roster Report, you may view the report without the Coordinating Official’s adjustments by selecting the View Grants Roster Report Without Adjustments button located at the bottom of the screen. The Grants Roster Report without the Coordinating Official’s adjustments details the cost amounts based on the Fellow’s saved records for the upcoming Fellowship Year.

NOTE: If an NSF Admin Official makes changes to a fellow’s Fellowship Status record that has a matching adjusted record in an adjusted or submitted Grants Roster Report, the change made by the NSF Official will overide the change for this fellow that the GRFP Financial Official made in the Grants Roster Report, and the adjustment made by the GRFP Coordinating Official will be removed from the system. If the report is in Submitted status, the status will automatically be reverted to Unsubmitted so that the GRFP Coordinating Official make any necessary adjustments and resubmit the report. The count in your Approve Grants Roster Reports inbox will decrease in this case.

The subtotal section of the report contains a summary of the cost amounts that are to be paid to the organization for the next academic year. It also includes a breakout of the cost amounts to be paid to fellows on tenure and other fellowship statuses.
Figure 18: Grants Roster Report Subtotal Box

If the Organization already has one approved Grants Roster Report, the subtotal box will display variance details from the 1st approved version of the Grants Roster report.

Figure 19: Grants Roster Report Subtotal with Variances

Additionally, a Variance Details box will display detailing the differences in fellow records from the 1st approved version to the current version of the Grants Roster Report.

Figure 20: Grants Roster Report Variance Details Box

Previously submitted Grant Roster reports will have a link to the Award Financial summary that was submitted as part of the award. After the 2010-2011 Fellowship year, the Grant Roster report and associated Award Financial Summary is not submitted to NSF.

Viewing Grants Roster Reports

To View a Grants Roster Report and its version history:
Select the View Grants Roster Report link from your General Administration Task List.

The search for Grants Roster Reports screen displays. You may search for Grants Roster Reports by Organization, Report Status or Academic Year. Note: Grants Roster reports are only available dating back to the 2008-2009 Fellowship Year. To view information on fellows prior to 2008-2009, access the relevant program Expense Reports or the View Fellow Information link.

Select the link next to the academic year’s report for which you would like to see a version history.

The View Grants Roster Report screen displays. If a version history exists for the particular report, the version history is listed at the top of the page. The version history lists general report information about each version of the report: adjust/submit date, report status, NSF review date, and a link to view that particular version of the report. The details of the most current version of the report are automatically displayed below. You can toggle back and forth between the various versions of the Grants Roster report by clicking the links in the version history table to view a particular version. Report versions record individual versions of the report and the report status states whether those particular versions have been approved by NSF. Line item adjustments in an Approved version of the Grants Roster will automatically be reflected in the respective fellows’ records.

To view the Financial Summary associated with the selected Grants Roster report version, select the View Financial Summary button.
Prior to the 2011-2012, the Grant Roster Reports were submitted by the Coordinating Official. These historical reports can be in a submitted, Approved or unsubmitted status. As of the 2011 – 2012 fellowship years, Grants Roster Reports will all be in an “Unsubmitted,” and are viewable through the Admin Module.
Managing Program Expense Reports

Managing Program Expense Reports

Each year, the GRFP Coordinating Official (CO) and Financial Official (FO) at each organization submits an Program Expense Report. GRFP officials also have the ability to adjust and resubmit Program Expense Reports for the last five fiscal years. NSF has the ability to control when these reports are made available to the GRFP officials for viewing and adjustment using the Task Settings area of the System Administration module. After a GRFP CO has reviewed the report, he/she has the option to submit the report as-is or to submit the report with adjustments. All submitted reports, with or without adjustments, require review and approval by NSF before they are considered finalized.

The list of reports pending approval and the approval/disapproval functionality is available through the Approve Program Expense Reports link in your task list. The link also contains a number next to it that indicates the number of reports that have been submitted for your approval.

NOTE: If an NSF Admin Official makes changes to a fellow’s Fellowship Status record that has a matching adjusted record in an adjusted or submitted Program Expense Report, the change made by the NSF Official will override the change for this fellow that the GRFP Official made in the Program Expense Report, and the adjustment made by the GRFP Official will be removed from the system. If the report is in Submitted status, the status will automatically be reverted to Unsubmitted so that the GRFP Official make any necessary adjustments and resubmit the report. The count in your Approve Program Expense Reports inbox will decrease in this case.
Approving Program Expense Reports

When you select the Approve Program Expense Reports link, the list of reports pending your approval will be displayed. Once you open the report, the first screen that will be displayed is the Submitted Report screen. Any fellow records that the GRFP Official has adjusted will have a Y in the Adj column.

![Submitted Program Expense Report Screen](image1)

**Figure 31: Submitted Program Expense Report Screen**

If adjustments have been made to the submitted Program Expense Report, you may view the report without the GRFP Coordinating Official’s adjustments by selecting the View Program Expense Report Without Adjustments button located at the bottom of the screen. The Program Expense Report without the GRFP Coordinating Official’s adjustments details the cost amounts that NSF has currently recorded in tenure records for the organization’s fellows for the year.

![Original Program Expense Report Screen](image2)

**Figure 32: Original Program Expense Report Screen**

NOTE: When GRFP Officials submit an Program Expense Report, they must sign an electronic certification certifying that the report accurately documents the dispersal of NSF funds. The electronic certification records the name of the GRFP Official and the date that the report was certified and submitted to NSF. This information can be found at the bottom of the Submitted Program Expense Report.

If adjustments have not been made to the Program Expense Report, a message at the bottom of the report will inform you that the GRFP FO submitted the report with no adjustments. After you have reviewed the report, you may approve the report using the Approve button located at the bottom of the Submitted Program Expense Report Screen. Once the report has been approved, the report status will be changed to Approved. The report will be saved with the adjusted information and the fellow records will be automatically updated to reflect the adjustments made by the GRFP Coordinating Officials.
Adjusting a Program Expense Report

In some cases, you may need to make adjustments to Fellow Records in a submitted Expense Report. To make an adjustment to a Fellow record:

Select Adjust next to the Fellow record you wish to adjust.

The fellow’s Fellowship Status, stipend, COE and travel costs are displayed in editable form.

![Figure 33: Adjust Fellow Record Screen (Program Expense Report)](image)

NOTE: Selecting the Fellow ID link will open a new browser window displaying the Fellow’s detailed Fellowship Status record. You may view and edit historical tenure information from the Fellow’s detailed Fellowship Status record. Enter your adjustments to the Fellowship Status, stipend, COE, travel, and/or other costs and your comments regarding the adjustment.

If you made changes to the Fellowship Status, you have the option of selecting Calculate to calculate the appropriate stipend and COE amounts for that Fellow.
NOTE: Stipend and COE amounts are calculated using a prorated value per month. If you make changes to the calculated amounts, you will be required to enter a comment explaining the variance.

Click the Save button

Returning Program Expense Reports
In some cases, you may need to return Program Expense Report to the Coordinating Official. To return a report:

Select the Return Report with Adjustments Button

The adjusted Program Expense Report displays with a Return Reason comments box.

Enter the reason for returning the report and select Submit.

The adjusted report is displayed. The adjusted fellow records are flagged with a Y in the Adj column. If you wish to view the original report without any adjustments reflected, you may click the View Program Expense Report without All Adjustments button available at the bottom of the page.

An email will be sent to the GRFP Official alerting him/her that the Program Expense Report has been returned and the reason for the return. The CO will be able to view the returned report and any adjustments. The GRFP Official will be able to make the requested changes to the report and resubmit the report to NSF.

Viewing Program Expense Reports
In addition to approving/disapproving reports, you may also use the View Program Expense Reports link to view Program Expense Reports and associated version histories of these reports.
To view Program Expense Reports:

Click on the View Program Expense Reports link.

Figure 35: View Program Expense Reports Search Screen

The View Program Expense Reports Search Screen displays. You may search by any combination of the search criteria: organization, report status, and academic year. You should then choose to limit your search to either current report versions only, or all report versions. Searching current report versions only will search only the most recent version of each annual Program Expense Report. Searching all report versions will search all the report versions of each annual Program Expense Report. For example, searching for a report status of submitted for the 2005 academic year by searching current report versions only would return only those 2005 Program Expense Reports whose most recent Program Expense Report version was currently in submitted status awaiting approval.

Figure 36: View Program Expense Reports Search Results

Click the view icon next to the relevant Program Expense Report once you have chosen a particular report to view.

Figure 37: View Program Expense Report Screen

The view Program Expense Report Screen displays and opens the report details of the report version that you
selected from your search results. You can toggle back and forth between report versions of this particular Program Expense Report by clicking the action icon for a different report version in the version history section of the page.

You can view, save, and print a PDF version of a particular version by clicking the View PDF icon above the report details section.

Understanding Report Versions

A new version of a Program Expense Report starts when a GRFP Official makes and saves the first line item adjustment to a fellow’s record on a Program Expense Report. The life of one version ends when NSF approves or rejects the report. When/if a GRFP Official makes and saves additional adjustments to this particular year’s Program Expense Report, a new version will be created for that particular year. The Original version of the report is created the first time a GRFP Official submits the Program Expense Report. The Original version is a snapshot report of the fellow’s Fellowship Status record details for the particular institution and year for which the Program Expense Report was submitted before any of the GRFP Official adjustments are approved and used to adjust fellow tenure records.

Understanding Report Statuses

Prior to submission by the GRFP Official, adjusted and unadjusted Program Expense Reports are in the status of “Unsubmitted,” and are not viewable through the Admin Module. If a GRFP Official has submitted a Program Expense Report with or without changes and the report is pending NSF review and approval, it will be displayed with a status of “Submitted”. Program Expense Reports that have previously been reviewed and approved by NSF are displayed with a status of “Approved”. When you disapprove a Program Expense Report, the report is displayed with a status of “Rejected.”

View/Editing An Award Financial Summary

The View/Edit Award Financial Summary module allows you to view the Award Financial Summary for the current Grants Roster Report Year for any Organization. From this view you will be able to view real-time Financial Summary information, upload funding recommendation memos and submit Program Office Adjustments for specific academic years for each award.

To view the Award Financial Summary:

Click on the View/Edit Award Financial Summary link

The View/Edit Award Financial Summary search screen displays:
You may scroll through the list of Organizations or select an Organization and select Search to locate the desired Organization.

Select the View/Edit link for the Financial Summary you wish to view.

2. The View/Edit Award Financial Summary screen for that Organization is displayed:

From the Award Financial Summary screen you are able to View the Institutions’ Current funding needs for the current fellowship year on the Institution Summary tab and add funding recommendation memos to an institution. Additionally, any active or expired awards are displayed in tabular format.

Note: Only awards with an effective date of 2003 or later will display in the Financial Summary module. Awards with the effective date prior to 2003 will not be displayed.
The Award Financial Summary screen displays with the Institution Summary tab for the current fellowship year:

Note: The GRFP Fellowship Year begins on June 1 through May 31st. The Institution Summary funding details are reflective of the current fellowship year.

<table>
<thead>
<tr>
<th>Academic Year</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012-2013</td>
<td></td>
</tr>
</tbody>
</table>

**Figure 41: View Award Financial Summary Screen – Institution Summary Tab**

On this screen, you are able to view the financial details of the current fellowship year with the total estimate of funding needs based on the current fellows Tenure Declaration.

At the top of the Institution Summary tab, the Summary at a Glance table provides more information on the institution:

**Figure 42: Summary at a Glance**

Note: For accurate financial reporting and award recommendations, all GRFP Institutions must submit their Program Expense Report to NSF each year prior to the October deadline. If there has been a report submission, the previous year’s Program Expense Report will display as a hyperlink to the report once it is approved by NSF. New GRFP Institutions will not have an Program Expense Report available until the first submission at the end of the first Fellowship Year.

Below is a listing of the Summary at a Glance fields and their descriptions:
<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Active Fellows (Summary at a Glance)</td>
<td>This number represents the total number of fellows, regardless of status, associated to the institution.</td>
</tr>
<tr>
<td>Total Fellows On Tenure</td>
<td>This number represents the total number of fellows who have declared Tenure.</td>
</tr>
<tr>
<td>Total Summer Start Fellows</td>
<td>This represents the total number of fellows who have declared as a Summer start fellow.</td>
</tr>
<tr>
<td>Total Fellows Not Yet Declared</td>
<td>This value represents the number of fellows that have not declared their Fellowship Status for the current fellowship year. Funds are not allocated for Fellows who have not declared their Fellowship Status. If the total number of fellows not declared is &gt; 0, the system will display a warning icon with more information</td>
</tr>
<tr>
<td>Program Expense Report OR Program Expense Report</td>
<td>This section will display a specific message based on the status of the last fellowship year program expense report. The following status may be displayed based on the current status of the previous years report:</td>
</tr>
<tr>
<td></td>
<td>Program Expense Report Not Submitted</td>
</tr>
<tr>
<td></td>
<td>Program Expense Report Submitted, not yet approved</td>
</tr>
<tr>
<td></td>
<td>Program Expense Report PO Rejected</td>
</tr>
<tr>
<td></td>
<td>Program Expense Report Not Required (New Inst. or Inst. w/o fellows from previous year)</td>
</tr>
</tbody>
</table>

Below is a sample screen of the Funding Details section on the Institution summary and a table with their appropriate descriptions:
**Figure 43: Funding Details**

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Fellows: 12-Month Tenure</td>
<td>This section details the total number of fellows and total funds for all fellows who require full tenure support. Please note, fellows in this category must be on Tenure for 12 months, and collecting full Stipend and full Cost of Education.</td>
</tr>
<tr>
<td>Stipend:</td>
<td>This row details the total number of fellows and funds that are collecting full Stipend for the current fellowship year.</td>
</tr>
<tr>
<td>Cost of Education Allowance</td>
<td>This row details the total number of fellows and funds that are collecting Stipend for the current fellowship year.</td>
</tr>
<tr>
<td>Subtotal Estimation of 12-Month Tenure Support Required</td>
<td>This row details the total number of fellows and subtotal of funds for all fellows who require full tenure support.</td>
</tr>
<tr>
<td>Total Fellows: Partial Support Tenure</td>
<td>This section details the total number of fellows and total funds for all fellows who require partial tenure support. Please note, fellows in this category can either be on Tenure for less than 12 months, or collecting partial Stipend or partial Cost of Education.</td>
</tr>
<tr>
<td>Stipend Partial Support:</td>
<td>This row details the total number of fellows and funds for those that receive partial stipend support.</td>
</tr>
<tr>
<td>Cost of Education Allowance Partial support:</td>
<td>This row details the total number of fellows and funds for those that receive partial cost of education allowance.</td>
</tr>
<tr>
<td>Subtotal Estimation of Partial Support Required:</td>
<td>This row details the total number of fellows and subtotal of funds for all fellows who require partial support.</td>
</tr>
<tr>
<td>Total Fellows - Other Allowances</td>
<td>Total fellows and funds for fellows that require funds in support of other allowances</td>
</tr>
<tr>
<td>Other Allowances</td>
<td>This amount refers to fellows that may require additional funds for GRFP approved allowances.</td>
</tr>
<tr>
<td>Subtotal Estimation of Other Allowances Support Required</td>
<td>This row details the total number of fellows and subtotal of funds that require Other Allowance support.</td>
</tr>
<tr>
<td>Total Estimate</td>
<td>This amount represents the total estimated funds required to support GRFP Fellows for the current fellowship year based on the calculation of all subtotal amounts.</td>
</tr>
<tr>
<td>Unliquidated Balance</td>
<td>This amount represents the Institution Balance Remaining from the Award noted.</td>
</tr>
</tbody>
</table>
### Potential Recommended Funding

This value is calculated to derive the projected institution funding to be recommended based on the current year’s Tenure Declaration amount and the previous year’s Institution Balance Remaining from awards noted.

Note: Fellows who receive full stipend and full COE but are on tenure for less than 12 months are categorized as Partial Support Fellows and will be accounted for in the Partial Support section of the Institution Summary.

The Financial Summary screen displays an institution’s active Awards as tabs across the top of the screen. The most recent award is named the displayed first. Each tab displays the award activities, amendment and expenses which have occurred during the period of the award. The system will calculate the Institution’s Balance remaining using the funds carried over from previous awards and the award activities. To view detailed information for a particular award, select the award tab you wish to view:
Figure 44: Primary Award Screen

At the top of each award tab, the Award Details table provides more information on the Award:

Figure 45: Award Details

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Award Start Date:</td>
<td>The effective date of the Award</td>
</tr>
<tr>
<td>Award End Date:</td>
<td>The expiration date of the Award</td>
</tr>
<tr>
<td>Total Awards:</td>
<td>Cumulative amount issued by NSF to date to the organization under the current award</td>
</tr>
<tr>
<td>Total Expenditures to Date:</td>
<td>Cumulative amount of total expenditures reported to NSF on the current award</td>
</tr>
<tr>
<td>Unliquidated Balance:</td>
<td>This is the difference between total obligations and expenditures from FAS.</td>
</tr>
</tbody>
</table>
Below the Award Details section, a list of the detailed funding transactions is provided in a table on the Award tab screen. The funding transactions included award activities, amendments and expenses which have occurred during the period of the Award. The Institution’s Balance Remaining is calculated with the funds carried over from previous awards and the award transactions.

**Figure 46: Funding Transactions**

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date</td>
<td>This is the transaction date.</td>
</tr>
<tr>
<td>Entry</td>
<td>This is a description of the transaction.</td>
</tr>
<tr>
<td>Program Expense Report</td>
<td>Fellowship expenses as reported by the Organization through the GRFP System’s Program Expense Report (formerly the Program Expense Report). Annual Institution Expenses are used to calculate the Institution’s Remaining Balance. If there are Program Expense Reports that have not been submitted in the award period, the Institution Remaining Balance will be inaccurate. Reports should be submitted for the missing years to ensure an accurate budget accounting.</td>
</tr>
<tr>
<td>Tenure Declaration</td>
<td>Projected expenses for the upcoming fellowship year as reported on your Organization’s Grants Roster Report.</td>
</tr>
<tr>
<td>Award</td>
<td>Each Award Amendment posted against the base award is displayed as a separate line item in the corresponding award tab.</td>
</tr>
<tr>
<td>Expenses</td>
<td>Expenses reported by the institution in their program expense report.</td>
</tr>
<tr>
<td>Program Office Adjustments</td>
<td>Miscellaneous adjustments made to institute balance by the NSF program office.</td>
</tr>
</tbody>
</table>
The Award History tab displays a historical view of an institution’s Awards, including Active and Expired awards. The Total Obligations, Expenditures and Remaining Balance are shown for each award.

The Institution Balance Remaining reflects the current balance of funds the institution has on hand based on the total awards made minus total expenditures and adjustments based on the carryover amounts from previous awards.

### Estimated Balance Remaining

<table>
<thead>
<tr>
<th>Award ID</th>
<th>Award Effective Date</th>
<th>Award Close Date</th>
<th>Total Obligations</th>
<th>Total Expenditures</th>
<th>Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>09023250</td>
<td>07/01/2009</td>
<td>06/30/2014</td>
<td>$1,140,000.00</td>
<td>$77,144.00</td>
<td>$1,062,856.00</td>
</tr>
</tbody>
</table>

**Figure 47: Award History Screen**

#### Uploading Funding Recommendation Memos

The Funding Memo tab provides a link to add/upload a recommendation memo for a specified institution. This tab also provides the ability to view any associated funding memos for each specified institution.

Funding Recommendation memos are added using the tab located on the Financial Award Summary page. Once the Funding Memos tab is selected the page displays existing Funding Memos associated to the specified institution. This page provides the following information for each institution in a table format:

- **Award ID**
- **Funding Memo Title**
- **Uploaded Date**
- **View/Delete Action**

**Figure 48: Funding Memo Tab**

To add a funding memo to the specified institution the user will click the Add Recommendation Memo link.
Figure 49: Link to Add a Recommendation Memo

Once the Add Funding Memo link is selected the following information must be provided:

- **Award ID** – Drop down list of active award id’s associated with the institution
- **Funding Memo Label** – The title or label name for the memo to be attached
- **Attachment** – A PDF file of the actual funding memo to be added

Figure 50: Upload a Funding Memo

Once the Save button is selected the Funding Memo page is automatically updated with the uploaded memo and the added memo information. A user can either view or delete the added memo by using the View and Delete links.

Figure 51: View/Delete a Funding Memo

**Viewing Fellowship Year Fellows report**

The Fellowship Year Fellows Report module allows you to view the Fellowship Year Fellows report for an academic organization. The Fellows report details all fellows that are currently associated with the selected organization for the current fellowship year as well as each
fellow’s eligibility for the next year of tenure. All changes that are made to a fellow’s tenure for the current year will be reflected in this report upon approval of the changes. Each organization’s report is available through the View Fellows Report link available in your task list.

Figure 52: View Fellowship Year Fellows Report Link

Once you have selected the View Fellowship Year Fellows Report link, you may select the organization and year you wish to view. After the report is displayed, you may sort the report by any of columns by clicking the column heading of that column.

Figure 53: Fellowship Year Fellows Report

Managing Fellow Information

The Fellow Information module allows you to view and edit/update information for all GRFP fellows. You may use this area to update a fellow’s profile and his/her tenure records. This module can be accessed using the View/Edit Fellow Information link that is available in your task list.
Once you have selected the View/Edit Fellow Information Link, a search box will be displayed that allows you to search for a specific fellow or fellows. You may search by fellow ID, last name, first name, organization, fellow status, and/or Fellowship Status.

When you search by fellow last name, fellows who have listed the given last name as a current or previous last name will be returned.

Once you have selected a fellow whose information you wish to view, there are eight tabs of information that are available for the selected fellow: Profile, Secret Questions, Fellowship Status Details, Fellowship Status History, Activities Reports, Fellowship Status Changes, Travel Requests, and Fellow Notes. A description of the information and functionality that are available in each of these tabs can be found in the sections below.

**Profile**

The Profile tab of the Fellow Information module contains a fellow’s contact and demographic information. When the profile tab is accessed, the fellow’s contact information is displayed in a read-only format.
Fellow Information | MAIN ▶

Fellow eTest18 - TESTE00018

Profile | Secret Questions | Fellowship Status Details | Fellowship Status History

User Name

First Name: Fellow
Last Name: eTest18
Middle Name:
Previous Last Name 1:
Previous Last Name 2:
Prefix: Mr
Suffix: Jr
System Username: eTest18
ORCID Identifier:

Mailing Contact Information

Street Address: 222 Fellow Road
   Unit F
City: Alexandria
State: VA
Zip: 22312
Email: grfpfellow@yahoo.com
Phone Number: 3333334445
Ext:
Country: US
Postal Code:
Permanent Contact Information

Street Address:

City:
State:
Zip:
Email:
Phone Number:
Ext:
Country:
Postal Code:

Update Information

Last Updated By: getest
Last Updated On: 05/18/2015

View Demographic Information

Edit

Figure 56: Fellow Information Profile Screen

The fellow’s demographic information can be viewed by selecting the View Demographic Information link located at the bottom of the screen. The demographic information is displayed in a read-only format but can be updated by clicking the Edit button.

Edit Profile

You may update any of the information, except for the fellow’s System Username, by clicking the Edit button located the bottom of the screen.
NOTE: The Fellow’s [Open Researcher and Contributor ID (ORCID), a 16-digit number](#) can be entered and updated by the Administrator.

**Secret Questions**

The **Secret Questions** tab of the Fellow Information module contains the secret questions and corresponding answers provided by the fellow. The secret question answered by the fellow for Retrieving their Username and their answer is displayed. Additionally, the secret questions answered by the fellow for Resetting their Password and their answer are displayed.
The Fellowship Details tab of the Fellow Information module contains all tenure records for the selected fellow. When the Fellowship Details tab is first accessed, there is a listing of the current and past tenure records for the fellow. You have the option to view, edit, or delete any of the fellow’s tenure records, add a new fellowship record, or delete a Non-Active Status Record.

![Figure 58: Fellow Information Fellowship Details Screen](image)

**WARNING:** If a GRFP Coordinating Official has saved changes to a Program Expense Report or submitted an Program Expense Report to NSF, but NSF has not yet approved the report, it is possible that an NSF Official might modify a fellowship record for a fellow for which the GRFP Coordinating Official has submitted a modification in their Program Expense Report. If this occurs, the change made by the NSF Official will override the change for this fellow that the GRFP Coordinating Official has made in the Program Expense Report, and the adjustment the GRFP Coordinating Official made will be removed from the system. If an adjustment is removed in this way, the GRFP Coordinating Official will receive a notification email. They must then log in and view their Program Expense Report to ensure that no further adjustments are needed to this fellow’s record. If the Program Expense Report was in Submitted status when this change occurred, the status of the report will automatically be reverted to Unsubmitted so that the GRFP Coordinating Official can make any necessary adjustments and resubmit the report.

**Adding New Fellowship Status Records**

If you select to edit or add a new fellowship record, a screen is displayed with the Fellowship Status detail fields. If you have selected to edit, these fields will be pre-populated with the current fellowship record information. The sections included in the tenure details form are the school information, tenure information, and cost information. The fields that are required for each fellowship record are flagged with an asterisk.
Adding Non-Active Status Records

If you wish to add a fellowship record to indicate that a fellow has completed tenure, declined an award, or terminated his/her fellowship, you must add a non-active Fellowship Status record. When you select to add this record, a screen is displayed that allows you to select the Fellowship Status and enter an effective date for the Fellowship Status record.

<table>
<thead>
<tr>
<th>Fellowship Year</th>
<th>Organization</th>
<th>Degree</th>
<th>Fellowship Status</th>
<th>Effective Date</th>
<th>Stipend</th>
<th>COE</th>
<th>Travel</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>University of Texas</td>
<td>On Tenure</td>
<td>Fall</td>
<td>09/01/2014</td>
<td>$12,000.00</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Figure 60: Fellow Information Add Fellowship Status Record Screen

Note: Maximum Stipend, COE and Travel amounts cannot be exceeded for a given Fellowship Year. In the event that the maximum amounts are exceeded, the system will produce an error message upon selecting save.

Figure 61: Fellow Information Add Non-Active Fellowship Status Record

You have the option to access fellow abroad information from this tab only when the fellow
has a tenure abroad record. This is depicted by the Y under the category Abroad. Click on the View/Edit link to then access the View Abroad Details link.

![Figure 62: Fellow Abroad Tenure Record](image)

Click the View Abroad Details link to access the fellow’s abroad details for the fellowship year. This function will allow you to view and edit the fellow’s abroad starting certificate, ending certificate, and payment enrollment information.

![Figure 63: Fellow Abroad Details](image)

**Fellowship Status History**

The Tenure History tab of the Fellow Information module contains a record of all the tenure statuses that a fellow has held during their fellowship. This record includes his/her Fellowship Status, the effective date, the username of the individual the Fellowship Status was updated by, the updated date, and comments associated with the fellow’s Fellowship Status.
Figure 64: Fellowship Status History Screen

**Activities Reports**

The **Activities Reports** tab within the Fellow Information module contains all the activities reports that the selected fellow has submitted during his/her fellowship including Additional Funding Opportunities. When the Activities Reports tab is accessed, a listing of the submitted activities reports is displayed. You may choose a report to view by selecting the **View Report** link. The full report is displayed, including the fellow's school information, summary of activities, achievements, career plans, fellowship feedback, other fellowship offers (if applicable), final fellowship summary (if applicable), and stipend feedback. If a fellow did not enter any information for a given section of his/her report, that section will be blank on your screen.

![Fellow Information Activities Report Screen](image)

Figure 65: Fellow Information Activities Report Screen

**Fellowship Status Changes**

The **Tenure Changes** tab of the Fellow Information module contains a list of the changes requests that a fellow has submitted during his/her fellowship. When you access the Tenure Changes tab, a list of the change requests is displayed including the request date and status. You may click the **View** link to view the details of the request. The request details are then displayed including the request summary, change information, reason for the request, cost information, and update information.
Travel Requests

The **Travel Requests** tab of the Fellow Information module contains a historical list of the travel allowance requests the fellow has submitted during his/her fellowship. When you access the Travel Requests tab a list of the change requests is displayed including the request date and status. You may click the **View** link to view the details of the request. The request details are then displayed including a request summary, departure information, return information, reason for the request, and update information.
**Fellow Notes**

The **Fellow Notes** provides the ability to input text to record correspondence online, attach files and view the notes and attachments by date & by author. Additionally, the Program Office can retrieve all the inputted notes in a PDF format and view the entire notes log in a consolidated PDF format.
Add a Fellow Note

Select ‘Add Notes’ link in Fellow Notes Summary as highlighted in the below screen.

Figure 69: Add Notes Link

The system displays the Add Notes screen as shown below. Enter the Subject relating to the Note and enter Notes. To attach a file, select browse button, attach the desired file and select ‘Save’ bottom of the screen. The system will navigate to ‘fellow notes summary’ to display the entered note and attachment.

Figure 70: Add Note Screen

View a Fellow Note
Select ‘View’ link in Action column next to the note you wish to view in Fellow Notes Summary.

Figure 71: View Note link

The selected note will appear in detail with the note number, entry date & time, the author, subject and the note as shown below

Figure 72: View Fellow Note

Select ‘Back to Summary’ to navigate back to ‘Fellow Notes Summary’.

Delete a Fellow Note

Select ‘Delete’ link in Action column next to the note you wish to delete in Fellow Notes Summary section.
Figure 73: Delete Note link

The system gives an option to cancel or confirm the action to delete with the below message. Select ‘Delete Note’ to delete the selected note or select cancel to avoid deletion.

Figure 74: Delete Note Confirmation

When ‘Delete Note’ is selected, system deletes the message permanently and navigates back to Fellow Notes Summary section. The remaining notes with their original Note numbers are displayed. When ‘Cancel’ is selected, the deletion is cancelled and the system displays Fellow Notes Summary section. View a PDF of an Individual Fellow Note. Select the ‘PDF’ link in the Action column next to the note you wish to delete in Fellow Notes Summary section.
Figure 75: View PDF link

The selected fellow note is generated in the PDF format. The PDF contains the name of the fellow, note number, entry date & time, author, subject, attachment information, the notes text, the printed date and time and the page number.

**View a PDF of the Fellow Notes log**

Select ’View PDF’ icon in Fellow Notes Details as shown in the below figure.

Figure 76: View Fellow Notes PDF Log Link

The consolidated fellow notes of a particular fellow are generated in the PDF format.

**Managing Fellows Abroad**

**Managing Fellows Abroad**

The Managing Fellows Abroad functionality allows you to manage the full Fellows Abroad lifecycle. The Fellows Abroad lifecycle includes Verifying the Fellows Abroad Enrollment and Viewing/Processing the Fellows Abroad Information that requires you to process the fellows Starting Certificates, Payment Enrollment Forms, Termination Certificates and view Travel Certificates (if submitted).
The Verify Fellows Abroad Enrollment and View/Process Fellows Abroad links are located in the Admin Task List and are always provided to you. The number to the right of each task notifies you that either a processing or verification action is required.

**Verify Fellows Abroad Enrollment**

The Verify Fellows Abroad Enrollment task enables you to verify that the requesting fellow is enrolled at an institution abroad. Verification will come from the fellow’s institution’s bursars office in the form of an email or other formal written correspondence (fax or mail). The number of fellows requiring enrollment verification is displayed on the right of each task in the Admin Task List.

To verify a fellows abroad enrollment:

Click on the **Verify Fellows Abroad Enrollment** link.

The Fellows Abroad Enrollment Verification Screen is displayed.
You are also able to run a search for a particular fellow or group of fellows by entering specific search criteria: Fellow ID, Organization or Last Name and hitting the **Search** button. Locate the fellow that you want to verify their enrollment at their given institution and press the **Verify** button.

The Verify Fellows Abroad Enrollment Screen is displayed.

![Verify Fellows Abroad Enrollment Screen](image)

**Figure 79: Verify Fellows Abroad Enrollment Screen**

To verify a fellows enrollment press the **Verify** button.

**NOTE:** Selecting the Fellow ID link in the Current Fellow Status bar will open a new browser window displaying the Fellow’s detailed Fellowship Status record. You may view and edit historical tenure information from the Fellow’s detailed Fellowship Status record.

A confirmation screen is displayed indicating that you have just verified the enrollment request for the chosen fellow. By verifying a fellow’s enrollment, the total number of fellows that need to be verified on your admin task list will be reduced by one and this fellow’s starting certificate will show up on the View/Process Starting Certificates list waiting for processing (see section 8.2.1 for detail).

**View/Process Fellows Abroad**

The View/Process Fellows Abroad task enables the Administrator to view/process the Fellows Abroad Starting Certificates, Payment Enrollment Forms, and Termination Certificates, and also enables the Administrator to view Travel Certificates. The number of certificates/forms that require processing is displayed next to the task in the Admin Task List.

To view/process a fellows abroad information:

1. Click on the **View/Process Fellows Abroad** link.
The View/Process Fellows Abroad Screen is displayed.

![View/Process Fellows Abroad Screen](image)

**Figure 80: View/Process Fellows Abroad Screen**

The View/Process Fellows Abroad Screen allows you to view/process the following Fellows Abroad Information: Starting Certificates, Payment Enrollment and Termination Certificates. You are also able to View Travel Certificates. The number to the right of each task in the Fellows Abroad Task List indicates that an action is required to process the certificate/form.

**View/Process Starting Certificate**

The View/Process Starting Certificate link allows you to View/Process the Fellows Abroad Starting Certificate information so that they can go abroad the upcoming fellowship year or new semester. A new Starting Certificate is required to be submitted each fellowship year for a fellow that is going abroad regardless of whether or not he/she stays at the same abroad institution.

To view/process a fellow’s starting certificate:

1. Click on the View/Process Starting Certificate link.

The View/Process Fellows Abroad Starting Certificate Screen is displayed.

![View/Process Starting Certificate Screen](image)

**Figure 81: View/Process Fellows Abroad Starting Certificate Screen**

As an Administrator, you are able to both Process and View/Edit a Fellows Starting Certificate. The Process action is a required action by you in order for the requesting fellow to go abroad. You are able to also View/Edit a fellows Starting Certificate if a change needs to be made, or if you need to print off the Starting Certificate of administrative purposes.

To process a fellows starting certificate:
Click on the **Process** link.

The Process Starting Certificate Screen is displayed:

![Figure 82: Process Starting Certificate Screen](image)

NOTE: Selecting the Fellow ID link in the Current Fellow Status bar will open a new browser window displaying the Fellow’s detailed Fellowship Status record. You may view and edit historical tenure information from the Fellow’s detailed Fellowship Status record.

Click the **Process** link to process the Fellow’s Starting Certificate.

![Figure 83: Process Button Screen](image)

After you press the **Process** button, a confirmation screen is displayed and you are able to return to the
FastLane Help

Administrator home page screen by pressing the **Admin Home Page** link. Once the process button is pressed to process a given Starting Certificate, the total number of Starting Certificates that require processing on the Admin Home Page as well as the number on the View/Process Fellows Abroad Screen will be reduced by one.

To view/edit a fellows starting certificate:

Click on the **View/Edit** link.

![Figure 84: View/Process Starting Certificate Screen](image)

The View Starting Certificate Screen is displayed.

![Figure 85: View Starting Certificate Screen](image)
NOTE: Selecting the Fellow ID link in the Current Fellow Status bar will open a new browser window displaying the Fellow’s detailed Fellowship Status record. You may view and edit historical tenure information from the Fellow’s detailed Fellowship Status record.

To edit a Fellows Starting Certificate, Click on the Edit button.

Figure 86: Starting Certificate Edit Button Screen

The Edit Starting Certificate Screen is displayed.

Figure 87: Edit Starting Certificate Screen

Edit the Fellows Starting Certificate fields.

NOTE: Selecting the Fellow ID link in the Current Fellow Status bar will open a new browser window displaying the Fellow’s detailed Fellowship Status record. You may view and edit historical tenure information from the Fellow’s detailed Fellowship Status record.
Press the **Save** button to save the edits/changes.

Once the Save button has been pressed, a confirmation screen is displayed that will allow you to return to the Admin Home Page by pressing the **Admin Home Page** link.

**View/Process Payment Enrollment**

The **View/Process Payment Enrollment** link allows you to view/process the Fellows Payment Enrollment information so that fellows abroad can receive their stipend while they are abroad. A new Payment Enrollment form is not required to be submitted each fellowship year where a fellow is going abroad. The Payment Enrollment form can be updated by fellows abroad whenever necessary.

To view/process a fellow’s payment enrollment information:

Click on the **View/Process Payment Enrollment** link.

The View/Process Payment Enrollment Screen is displayed.

![View/Process Payment Enrollment Screen](image1.png)

**Figure 88: View/Process Payment Enrollment Screen**

As an Administrator, you are able to both **Process** and **View** a fellow’s Payment Enrollment information. The **Process** action is a required action by you in order for the requesting fellow to go abroad and receive his/her stipend. You are able to also **View** a fellow’s Payment Enrollment information if you need to print off the Payment Enrollment information for administrative purposes.

To process a fellow’s payment enrollment information:

Click on the **Process** link.

The Process Payment Enrollment Screen is displayed:
NOTE: Selecting the Fellow ID link in the Current Fellow Status bar will open a new browser window displaying the Fellow’s detailed Fellowship Status record. You may view and edit historical tenure information from the Fellow’s detailed Fellowship Status record.

Click the Process link to process the Fellows Payment Enrollment information.

After you press the Process button, a confirmation screen is displayed and you are able to return to the admin home page screen by pressing the Admin Home Page link. Once the process button is pressed, the total number of Payment Enrollment forms that require processing on the Admin
Home Page and the View/Process Fellows Abroad Screen will be reduced by one per processing action.
To view a fellow's payment enrollment information:
1. Click on the View link.

Figure 91: View/Process Payment Enrollment Screen

The View Payment Enrollment Screen is displayed.

Figure 92: View Payment Enrollment Screen

NOTE: Selecting the Fellow ID link in the Current Fellow Status bar will open a new browser window displaying the Fellow's detailed Fellowship Status record. You may view and edit historical tenure information from the Fellow's detailed Fellowship Status record.

View/Process Termination Certificates

The View/Process Termination Certificate link allows you to view/process the Fellow's Termination Certificate so that they can end their fellowship abroad. A Termination Certificate is required to be submitted for each fellowship year when a fellow is abroad.
To view/process a fellow's Termination Certificate:
1. Click on the View/Process Termination Certificate link.
The View/Process Termination Certificate Screen is displayed.

![View/Process Termination Certificate Screen](image)

**Figure 93: View/Process Termination Certificate Screen**

As an Administrator, you are able to both **Process** and **View/Edit** a fellows Termination Certificate. The Process action is a required action by you in order for the requesting fellow to terminate their tenure abroad. You are able to also View/Edit a fellow’s Termination Certificate if a change needs to be made, or if you need to print off the Termination Certificate for administrative purposes.

To process a Fellow’s Termination Certificate:

- Click on the **Process** link.

The Process Termination Certificate Screen is displayed:

![Process Termination Certificate Screen](image)

**Figure 94: Process Termination Certificate Screen**

NOTE: Selecting the Fellow ID link in the Current Fellow Status bar will open a new browser window.
displaying the Fellow’s detailed Fellowship Status record. You may view and edit historical tenure information from the Fellow’s detailed Fellowship Status record.

Click the Process link to process the Fellows Termination Certificate.

After you press the Process button, a confirmation screen is displayed and you are able to return to the admin home page screen by pressing the Admin Home Page link. Once the process button is pressed, the total number of Termination Certificates that require processing on the Admin Home Page and the View/Process Fellows Abroad Screen will be reduced by one per processing action.

To view/edit a Fellow’s termination certificate:

Click on the View/Edit link.

Figure 95: View/Edit Termination Certificate Screen

The View Termination Certificate Screen is displayed.
Figure 96: View Termination Certificate Screen

NOTE: Selecting the Fellow ID link in the Current Fellow Status bar will open a new browser window displaying the Fellow’s detailed Fellowship Status record. You may view and edit historical tenure information from the Fellow’s detailed Fellowship Status record.

To edit a Fellow’s Termination Certificate, Click on the Edit button.

The Edit Termination Certificate Screen is displayed.

Figure 97: Edit Termination Certificate Screen
NOTE: Selecting the Fellow ID link in the Current Fellow Status bar will open a new browser window displaying the Fellow’s detailed Fellowship Status record. You may view and edit historical tenure information from the Fellow’s detailed Fellowship Status record.

Edit the Fellows Termination Certificate fields.

Press the Save button to save the edits/changes.

Once the Save button has been pressed, a confirmation screen is displayed and it will allow you to return to the Admin Home Page by pressing the Admin Home Page link.

View Travel Certificate

The View Travel Certificate link allows you to view the fellows’ submitted Travel Certificates. A Travel Certificate is only able to be submitted and approved once and only when the fellow is going to and from an abroad institution. If a Travel Certificate travel allowance request is disapproved, the fellow can modify and resubmit a Travel Certificate.

NOTE: To approve/disapprove a Travel Certificate, see the “Manage Travel Allowance Requests” section of this guide. Click the Approve Travel Request link on the Admin Task List to view, approve, or disapprove travel requests and Travel Certificates.

To view a Fellow’s travel certificate:

Click on the View Travel Certificate link.

The View Travel Certificate Screen is displayed.

![Figure 98: View Travel Certificate Screen](image)

Choose a Travel Certificate and press the View link.

The View Fellow’s Travel Certificates Screen is displayed.
NOTE: Selecting the Fellow ID link in the Current Fellow Status bar will open a new browser window displaying the Fellow’s detailed Fellowship Status record. You may view and edit historical tenure information from the Fellow’s detailed Fellowship Status record.

You are then able to view the submitted Travel Certificate that the fellow submitted. You are also able to view the fellow’s travel certificate in PDF format. To exit the View Fellow’s Travel Certificates Screen, you can press the Cancel button or click on the Fellowship Administrative Home link at the top of the page.

Viewing Analytical Reports

Viewing Analytical Reports

The analytical reports module allows NSF to view multiple types of analytical reports including, ad hoc reports, activity report statistics and various fellow reports. The ad hoc reports tab allows Administrators to retrieve reports for fellows, along with their organization and status, currently in effect, as well as for fellows, along with all their organizations and statuses, for a selected year. The Activities Reports area allows NSF to view the overall statistics for submitted activities reports by academic year and by organization. The Fellow Reports area contains the Award Acceptance and Decline Report, the Fellowship Status Plans Declaration Report, the WENG/WICS Report, the Organization Report, the Fellow Abroad Report, the Retiree Report, and the Fellowship Status Report. All of these reports can be accessed using the View Analytical Reports link available in your task list.
Ad Hoc Reports

The ad hoc reports tab allows Administrators to retrieve two different types of reports. The first report, Fellow Current Information, returns a list of fellows along with their organization and status currently in effect. The second report, “Tenure Record Information for year”, returns a list of fellows along with all their organizations and statuses for the selected year. Administrators must select one of the following primary filters when searching: Last Name, Major Field of Study, Specific Field of Study, Organization, Fellowship Status, Fellow Status, Year Awarded. In addition, Administrators may also filter on one or more of the following: Gender, Race, Ethnicity, Disability, WENGS, WICS.
Activities Report Statistics

The Activities Reports tab in the Analytical Reports module contains statistical reports on the activities reports that are submitted by the fellows each year. When you access the page, the most recent year’s statistics for all fellows are displayed by default. If you wish to view a different year’s report or to view a report for a specific organization, you may use the search box at the top of the page. You are required to enter a specific academic year for all searches.
Figure 102: Activities Report Statistics Screen

You may also view the specific achievements that have been reported for the selected year by clicking the View All Achievements link located in the Achievements section of the report. You may search for specific achievements by academic year, organization, fellow’s field of study, and/or achievement type.

Figure 103: View All Achievements Screen

Fellow Reports

The Fellow Reports tab in the Analytical Reports module contains the Award Acceptance and Decline Report, the Fellowship Status Plans Declaration Report, the WENG/WICS Report, the Organization Report, Fellowship Status Report, the Fellow Abroad Report, the Retiree Report and the Additional Funding Opportunities Report.

After you select the tab, the list of available reports is displayed with links to each type of report.
The **Fellowship Status Plans Declaration Report** details the number of fellows eligible for tenure each year and the number that have declared their tenure plans for the selected year.

The **Award Acceptance and Decline Report** details the number of award acceptances and declinations for each academic year. It also contains both a list of the awardees that have neither accepted nor declined, and a list of the awardees that declined their awards and the reason(s) the awardees gave for declining their awards.
The **WENG/WIC/ARRA Report** details the number of Women in Engineering, Women in Computer Science, and fellow designated as ARRA fellows for each academic year. The total number of WENG/WIC/ARRA fellows is displayed along with the number of WENG, WIC and ARRA fellows for each Fellowship Status. There is also a detailed listing of each WENG/WIC/ARRA for the academic year that includes the fellow’s name, organization, field of study, Fellowship Status, and directorate (for ARRA fellows only).
The **Organization Report** details organizations that have fellows participating in the GRFP program for each academic year as well as the "Current" date. Organizations are listed along with the number of fellows that are associated with the organization.
The **Fellowship Status Report** details the number of active fellows for each academic year and the number of fellows for each Fellowship Status.

The **Fellows Abroad Report** lists the fellows for a given academic year that are abroad, along with their Fellow ID, Organization they are attending abroad, Tenure Start period, Fellowship Status and Bank name.
The **Retiree Report** lists all of the fellows that are going to be retired or have been retired for a given calendar year, along with their Fellow ID.

The **Activities Reports Not Submitted** lists all of the fellows who have not submitted an activity report for a given academic year, along with their Fellow ID number, Months on Tenure, Months on Reserve, Award Year and Current Organization.
The Unsatisfactory Rating Fellows Report depicts the total number of ratings for a given year, which may include ratings from multiple organizations for those fellows who were on tenure at more than one organization in a year. Additionally the Unsatisfactory Rating Fellows Report provides a list of fellows who have not been rated.

The Underrepresented Minorities Report depicts the Total Number of Underrepresented Minority Fellows that are Active for a given year. The report also provides a detailed break down of Minorities by Race and Ethnicity.
The Active Fellows Disability Status Report depicts the total number of active fellows with disability for a given year. The report also provides a detailed break down of Disabilities by type of disability listed. The report contains a detailed description of fellows who chose “Other Disability” and specified that disability in text.
The **Travel Requests Report** details the number of submitted travel allowance requests and Travel Certificates that were submitted during a given tenure each year and the statistics on how many were approved, disapproved, or pending by CO or NSF Administrator. The report also details all pending travel allowance requests.
The Additional Funding Opportunities Report depicts the number of fellows who submit requests for Additional Funding opportunities in a given fellowship year and the statistics on how many were approved, disapproved, or pending by CO or NSF Administrator. The user can search by Academic Year or Additional Funding Opportunity type or both. The report provides a detailed breakdown of Additional Funding requests.
Administering the GRFP System

Administering the GRFP System

There are four administration features that are available for managing the GRFP System. They include managing email notifications, managing costs, and managing task dates. The system administration features are available using the System Administration.
A description of each feature in the System Administration module can be found in the sections below.

### Managing Email Notifications

Many of the tasks that fellows and Coordinating Officials must complete are tasks that need to be performed at certain times of the year. For each of these types of tasks, the system will send email reminders to the selected recipient group(s) that details what task must be completed on the day that NSF takes the action to send out the email.

For certain emails, upon selecting Send Email, you will be able to select multiple recipient groups including secondary email addresses for Fellows. The default recipient can not be changed; however you may select as many additional recipient groups as are available. In the event that a separate email type needs to be created and sent to multiple user groups, you can use the Ad Hoc email functionality that allows you to create a custom email message and distribute to one or multiple audiences.

The Email tab of the System Administration module allows NSF to manage the send dates for these emails. NSF can also edit the text of the email that is sent for each task reminder.
FastLane Help

Note: For each email type, the email will be sent out to the entire group of recipients in the category with the exception of the Ad Hoc email, which allows you to choose your recipient group. For example, when sending out an email to Coordinating Officials for Fellow Rating Submission, all COs will receive the email, whether or not they have fellows that need to be rated.

Sending an Adhoc Email

If one of the predefined email options are not applicable to the message you are sending, you can use the adhoc email functionality to define your recipient groups and the text of the email. NSF can also edit the text of the email that is sent for each task reminder.

To send an adhoc email:

Select the send email link next to the Adhoc Email type

The adhoc email screen appears:
Select the recipient group (Abroad Fellows, Fellows, Coordinating Officials)
If sending to Fellows, select Secondary Email addresses to send the email to both the primary and secondary email addresses of the Fellows.
Enter the email addresses of any additional recipients (if applicable)
Enter the sender’s email address
Enter the email Subject
In the email text box, enter the body of the email. You may adjust the font size, font type and format from this text box.
To insert a hyperlink,
Highlight the text that you wish to become a link
Select the hyperlink button to the right of the underline button
Enter the URL that the link should point to
Select Submit Query

The text that was highlighted should now be blue and will be a link when the email is previewed and sent.

Select Continue

The email preview screen appears

Select Send Email to send the email

Communications History

Storage of AdHoc emails that are sent from the Admin Module are now stored and searchable for anyone with administrative rights within the System Administration link.

![Figure 122: System Administration](image)

Once on the Communications History tab, a user can search for an email by: Date, Recipient Type or Subject.

![Figure 123: Communications History Tab](image)

Once the user has identified the email they are searching for they can select the view link to view the contents of the email.
Managing Costs

The **Costs** tab of the System Administration module allows NSF to manage the fellowship costs for each fiscal year. The costs include the stipend amount, cost-of-education allowance, and GROW awards. The GRFP System will automatically populate the costs for the next fiscal year each year with the costs from the previous year. NSF then has the ability to update these costs as needed. The changes to the costs will be reflected in each new fellow Fellowship Status record for that fiscal year, unless otherwise changed by NSF.

The **Costs** tab also provides the ability for a user to Edit/Apply funding changes to a specific fellow record after the approval of an additional funding opportunity by selecting either the Apply Funding link.

When the Apply Funding link is selected the user is taken to the Apply Funding Confirmation page. The user confirms/updates the Academic Year and then selects the Funding Opportunity Type from the drop down list and clicks the Apply Funding button.
Managing Task Settings

The Task Settings tab of the System Administration module allows the NSF Administrators to manage tasks for Fellows, Applicants, Reference Writers, and Coordinating Officials.
Administrators are able to turn tasks “On” or “Off” for Fellows, Applicants, Reference Writers, and Coordinating Officials by choosing a start and end date for those tasks. If the current date falls between a task’s start and end dates, then the task is “On” and will be indicated by a green checked icon. If the current date falls outside of a task’s start and end dates, then the task is “Off” and will be indicated by a red X icon. When tasks are “On”, the links to these functions will be available for the appropriate users.

To Edit a Task Setting:

Click the **Edit** link of a task.

The Edit Task Dates screen will appear.

Enter or choose the new **Start** and **End Dates** for the Task and press **Save**.
Figure 129: Edit Task Dates Screen

The Edit Task Dates screen will appear.
Choose to do one of the following:

- Continue
- Cancel
- Edit Academic Year

Figure 130: Accept/Decline Award Screen

If you choose to Continue, you will be accepting the default Academic Year provided by the system, and will be asked to confirm and save the new start and end dates that you entered:
Figure 131: Accept/Decline Award Task Screen 2

If you choose to **Cancel**, you will be returned to the initial task screen where you can enter the new start and end dates.

If you choose to **Edit** the Academic Year, you will be asked to enter in the New Value for Academic Year in YYYY-YYYY format.

Figure 132: New Academic Year Screen

Managing Display Dates

The **Display Dates** tab of the System Administration module allows the NSF Administrators to manage the dates that are displayed on various screens in the GRFP system. Administrators will be able to modify the display dates for Application Deadlines, Certification Page Deadlines, and Official Transcript Deadlines. Note, these dates that are modified in the Display Dates function are for display purposes only. For example, the Application Deadlines entered here are used by the system to display the Application Deadline dates on the main GRFP screen when the “Submit Application Package” task is “On” via the Task Settings function.

The table below describes where in the system each Display Deadline Date appears.

<table>
<thead>
<tr>
<th>Display Deadline Date</th>
<th>Screen</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application Deadlines</td>
<td>Main GRFP home page screen when the Submit Application Package task is On</td>
</tr>
<tr>
<td></td>
<td>Applicant - Check Application Package Status screen</td>
</tr>
<tr>
<td>Certification Page Deadline</td>
<td>Fellow – Accept/Decline Award screen</td>
</tr>
<tr>
<td>Official Transcripts</td>
<td>Applicant - Check Application Package Status screen</td>
</tr>
</tbody>
</table>

To Edit a Display Date:

Click the **Edit** link of a deadline date.
The Edit Deadlines screen is displayed.
Enter or choose the new Dates for the Deadlines and press the Save button.

The Edit Application Deadlines Screen is displayed.
You will be asked to verify that you would like to edit the Deadlines as follows:

Save
Cancel
Figure 135: Edit Deadline Screen 2

If you choose **Save**, your edits will be committed to the system and you will be returned to the Display Dates main page.

If you choose **Cancel**, your edits will not be committed to the system and you will be returned to the Edit Deadline Screen to change the deadline dates or cancel out of the Edit Deadlines Screen.

**Managing Comments**

The Comments tab of the System Administration module allows NSF to manage the GRFP comments/advisories posted on the GRFP home page and individual module pages. The GRFP System will automatically display the comments entered in the corresponding module page based on the date range selected.

**Figure 136: Cost Administration Screen**

The table below describes where in the system each Comment appears.

<table>
<thead>
<tr>
<th>Comment Type</th>
<th>Comment Type Description</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>APL</td>
<td>Fastlane GRFP Application Comments</td>
<td>View</td>
</tr>
<tr>
<td>COR</td>
<td>Fastlane GRFP Coordinating Official Main Page Message</td>
<td>View</td>
</tr>
<tr>
<td>FLW</td>
<td>Fastlane GRFP Fellow Main Page Message</td>
<td>View</td>
</tr>
<tr>
<td>GEN</td>
<td>Fastlane GRFP General Comments displayed on GRFP main page</td>
<td>View</td>
</tr>
<tr>
<td>REF</td>
<td>Reference Letters Comments</td>
<td>View</td>
</tr>
<tr>
<td>TRS</td>
<td>Official Transcripts Comments</td>
<td>View</td>
</tr>
<tr>
<td>Comment Type</td>
<td>Comment Type Description</td>
<td>Action</td>
</tr>
<tr>
<td>--------------</td>
<td>--------------------------</td>
<td>--------</td>
</tr>
<tr>
<td>APL</td>
<td>Fastlane GRFP Application Comments</td>
<td>View</td>
</tr>
<tr>
<td>COR</td>
<td>Fastlane GRFP Coordinating Official Main Page Message</td>
<td>View</td>
</tr>
<tr>
<td>FLW</td>
<td>Fastlane GRFP Fellow Main Page Message</td>
<td>View</td>
</tr>
<tr>
<td>GEN</td>
<td>Fastlane GRFP General Comments displayed on GRFP main page</td>
<td>View</td>
</tr>
<tr>
<td>REF</td>
<td>Reference Letters Comments</td>
<td>View</td>
</tr>
<tr>
<td>TRS</td>
<td>Official Transcripts Comments</td>
<td>View</td>
</tr>
</tbody>
</table>

To Edit a Comment and the display dates:
1. Click the Edit link of the Comment Type that needs to be edited.

The Edit Comments screen is displayed.
- Enter or updated the text in the comments box.
- Choose the new Start Date and End Date for the Comments to be displayed and press the Save button.

Figure 137: Comments Administration Screen
Figure 138: Edit Comments Screen

To View a Comment in read-only format:
Select the View link.

Figure 139: View Comments

Post Submission Changes
Post Submission Changes

There are four administration features that are available for managing the GRFP applications. They include Editing the Application, Uploading Applicant References, Viewing the Application Change Log, and Viewing/Printing an Application. The Post Submission features are available in your Post Submission Changes task list.

Figure 140: Post Submission Changes Screen

A description of each feature in the Post Submission Changes task list can be found in the sections below.

Edit Application

The Edit Application link allows the NSF Administrators to edit an Applicant Application regardless of the status of the application (submitted or unsubmitted). Administrators will be able to edit all applicant fields of the application. To Edit an Application press the Edit Application link.
The Edit Application screen will appear, which will allow you to search for a specific Applicant from the current application year using the Applicant ID number. You are also able to search for an applicant by Applicant Name (first and last) and by Applicant Email Address.

Search results are then displayed where you are able to choose an Applicant’s Application to edit for the current academic year. To edit an applicant’s application, press the Edit link.
FastLane Help

Figure 143: Edit Application Search Results

Once the Applicant Application appears, you will be able to edit the following sections: Personal Profile, Education and Work Experience, Proposed Graduate Program, References, Personal Statements, Previous Work Experience, Proposed Plan of Research, and NSF GRFP Program Information. To edit those sections individually, press the Edit link next to each of the sections titles. You will be taken to the applicant’s application where you are able to edit the various data fields.

Figure 144: Edit Application Screen

Upload Applicant References

The Upload Applicant References link allows you to upload an Applicant’s Reference letter in the event that the Referee had an issue uploading the reference letter. Once you have received a soft copy of the reference letter from a reference writer, you can upload the file for the reference writer through the admin system.
To Upload an Applicant Reference Letter:

Select the **Upload Applicant References** link.

Once you select the **Upload Applicant References** link, a new screen will appear that will allow you to search for the reference writer’s email address.

**Figure 146: Submit Reference Letter Search Screen**

Enter the reference writer’s email address and **search** to find a list of all fellows that have requested a letter from this reference writer.

Select the “**Submit**” action in the appropriate row.
The Submit Reference Letter Screen is displayed.

![Submit Reference Letter Screen](image)

**Figure 147: Submit Reference Letter Screen**

Click the **Continue** button to pass through the writing portion of the reference letter upload steps.

On the Select Confidentiality portion, make a selection and click the **Continue** button.

Upload the reference letter.

Upload the Reference Letter:

- Either **type** the file location of the reference letter in the input box or click the **Browse** button to find the location of the file.

- Click the **Upload** button to begin the upload process.

The PDF Conversion/Compliance Check screen is displayed. Please note this process may take a few minutes. Every 15 seconds this page will refresh to check the status of your file. During the upload process, the file is converted to a PDF. After successful conversion, the **File Successfully Converted/Checked** screen is displayed.

- Proof-read the converted PDF file. Click the **Proofread PDF** button to proofread the converted file, paying special attention to ensure that all figures, graphics, tables, margins, page breaks, and other special formatting options have been accurately preserved.

A new window is opened to display the PDF file. The **Proofreading Complete** screen is displayed.

- Click the **Accept** button to accept the converted PDF file (However, if you detect any problems in the PDF file, you may cancel the upload by clicking on the **Cancel** button. The Referee may then correct the errors and resubmit the corrected version of his/her document.)
A confirmation will be displayed letting you know that you have successfully submitted the reference letter.

**View Application Change Log**

The **View Application Change Log** link allows the NSF Administrators to view all of the changes made to an applicant’s application. Administrators will be able to view the before and after values where changes were made and the associated column name. To View the Application Change Log, press the View Application Change Log link.

![Figure 148: View Application Change Log Link](image)

The View Application Change Log screen will appear, which will allow you to search for a specific Applicant using the Applicant ID number. You are also able to search for an applicant by Applicant Name (first and last) and by Applicant Email Address.

![Figure 149: View Application Change Log Screen](image)

Search results are then displayed where you are able to choose an Applicant’s Application to view the applicant.
change log for the different academic years. To view an applicant’s change log, press the View Change Log link.

Figure 150: View Change Log Screen

Once the Applicant Change Log appears, you will be able to view the following sections: Applicant Details, Change Action, Table, Last Updated Time Stamp, Last Updated User, and Action.

Figure 151: View Change Log Detail Screen

You will also be able to View the Change Log Details by pressing the View Change Log Details link.
View Application and Package Status/Application Reviews

The **View Application and Package Status/Application Reviews** link allows the NSF Administrators to view/print an application including associated uploaded statements and uploaded letters of reference. The link also allows NSF Administrators to view the application package status as it appears to the applicant and make edits to the reviews themselves. To View an application or an applicant’s package status, press the **View Application and Package Status/Application Reviews** link.

The View Application and Package Status/Application Reviews screen will appear, which will allow you to search for a specific Applicant using the Application Year, Applicant ID, Applicant Name, Email Address and/or Proposed Research Title.
Search results are then displayed by different fields to help assist you in finding the correct fellow or record. The Applicant ID, Name, Short Research Title, Application Year, Application Status, and Final Status are all displayed in the search results screen. Additionally you are able to choose to view an Application Package, Panel PDF or view (and then edit) an Application Review.
Viewing Award Certification Forms

Viewing Award Certification Forms

The View Award Certification Forms task allows you to view the award certifications that were accepted by the awardee for a specific fellowship year. The View Award Certification Form task also allows you to search by academic year but defaults to the current academic year when opened.
To view/print single award certification forms:

Click on the **View Award Certification Forms** link.

The View Award Certification Forms Screen is displayed.

![View Award Certification Forms Screen](image)

**Figure 159: View Award Certification Forms Screen**

Choose the fellow whose Award Certification Form you wish to view and press the **View/Print PDF** link.

The Fellows Award Certification Form is displayed in PDF format.
CERTIFICATIONS PAGE

There are five certifications which must be made before the National Science Foundation can authorize funds for a fellowship award. These concern 1) controlled substances; 2) delinquency on Federal debt; 3) debarment and suspension; 4) originality of the application; and 5) eligibility criteria.

CERTIFICATIONS

I certify that:

☑ 1. I will not engage in unlawful manufacture, distribution, dispensing, possession or use of a controlled substance in the conduct of any activity with this fellowship award;

☑ 2. I am not delinquent on repayment of any Federal debt, and

3. To the best of my knowledge and belief:

☑ (a) I am not presently debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from covered transactions by any Federal department or agency;

☑ (b) I have not within a three-year period preceding my application been convicted of or had a civil judgment rendered against me for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State, or local) transaction or contract under a public transaction; violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;

☑ (c) I am not presently indicted for or otherwise criminally or civilly charged by a governmental entity (Federal, State or local) with commission of any of the offenses enumerated in paragraph (3) (b) of this certification; and

☑ (d) I have not within a three-year period preceding this application had one or more public transactions (Federal, State or local) terminated for cause or default.

☑ 4. The essays (personal statement, previous research experience and proposed plan of research) and proposed research in the application are my own original work.

☑ 5. I have read the NSF GRFP eligibility criteria and to the best of my knowledge and belief I certify that I am eligible for this fellowship.[See the Program Solicitation for eligibility criteria.]

By electronically signing the request, I am certifying that (a) the statements made herein are true and complete to the best of my knowledge; (b) I have not previously accepted an NSF Graduate Research or Predoctoral Fellowship; and (c) I agree to comply with NSF GRFP Fellowship terms and conditions if the request is granted.

Willful provision of false information in this request and its supporting documents or in reports required under an ensuing award is a criminal offense (U.S. Code, Title 18, Section 1001).

Figure 160: Fellows Award Certification Form

Once the fellows Award Certification Form is displayed in PDF format, you are able to print off the Award Certification Form for administrative purposes.

View/Print All Award Certification Forms

To view/print all award certification forms:

Click on the View Award Certification Forms link.

The View Award Certification Forms Screen is displayed.
Choose the View/Print All PDFs button to view/print off all of the award certification forms for a particular academic year.

Once the Fellows Award Certification Forms are displayed in PDF format, you are able to print off the Award Certification Forms for administrative purposes.

**Track CO Activities**

**Track CO Activities**

The Track CO Activities task allows you to monitor CO progress against regular activities. The Track CO Activities task also allows you to send reminder emails to COs to complete outstanding activities.
Pending Change Requests

The Pending Change Requests report allows you to see a report of all Fellowship Status Change Requests that have been in the CO pending state for over 30 days. The email addresses of the Primary COs at the associated schools are listed in this report for your convenience. In the event the organization does not have a Primary CO, the Secondary CO will be listed. You can contact each of these COs using an external email account at any time. To a single reminder email to each listed organization’s Primary and Secondary COs, click the ‘Send Reminder Email to All Listed Organizations’ button.

![Pending Change Requests Screen](image)

View Application and Package Status

The View Application and Package Status link allows the NSF Administrators to view/print an application including associated uploaded statements and uploaded letters of reference. The link also allows NSF Administrators to view the application package status as it appears to the applicant. To View an application or an applicant’s package status, press the View Application and Package Status link.
The View Application and Package Status screen will appear, which will allow you to search for a specific Applicant using the Application Year and Applicant ID. You are also able to search for an applicant by Applicant Name (first and last) and by Applicant Email Address.
Search results are then displayed where you are able to choose an application to view the application for the chosen academic year, or view the application package status as it appears to the applicant.

To view an application, press the Application link. The View/Print Application screen displays.
To view the application package status, press the **Application Package Status** link.

**Figure 127: Current Application Package Status Screen**

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**GRFP Official User Guide  GRFP Official**

**User Guide  Conventions used in this guide**

The first time they are introduced, names of on-screen features appear in bold.

**EXAMPLE:** Click on the **Search** tab.

Uniform Resource Locators (URLs) are in bold characters and are underlined.

**EXAMPLE:** Type the following address in your browser's address bar:

http://fastlane.nsf.gov

Many software features and some business processes are explained in a reference table format. An on-screen term
FastLane Help

appears in the left column and a description of the term appears in the right column.

**EXAMPLE:**

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Applicant ID</td>
<td>The Applicant ID is the number assigned to you when you become an applicant.</td>
</tr>
</tbody>
</table>

The following three conventions serve as both examples and descriptions:

**WARNING:** Warnings provide information designed to prevent critical errors from occurring. If you see a warning, stop and read it before continuing.

**NOTE:** While Notes do not describe critical information, we suggest that you stop and read them, too. The information in a note can prevent minor errors from occurring. Other notes simply provide information designed to deepen your understanding of a software feature.

**TIP:** Tips provide information designed to increase your productivity.

**Getting Access**

**Getting Access Logging In**

Access the GRFP application by typing the following address into your browser address bar: [http://www.fastlane.nsf.gov/grfp](http://www.fastlane.nsf.gov/grfp)

![Figure 1: GRFP Officials Log In](image)

Type your last name in the Last Name field.

Type your NSF ID in the NSF ID field.

Type your password in the Password field.

Click the Login button.

The GRFP home page appears with your Task List and current Profile.
NOTE: If your password has expired or if you logged in with a temporary password, you will be redirected to Research.gov. Click here to access the Research.gov Help System and learn more about the password functions.

Authenticate by logging in to Research.gov with your Last Name, NSF ID, and expired or temporary password.

To change your password, enter your expired or temporary password, your New Password, and Confirm your New Password.

Click the Change Password button.

A confirmation screen will be displayed.

Click the Continue to FastLane button to return to FastLane.

Looking up your NSF ID

NSF now requires that users use an assigned NSF ID rather than their Social Security Number to login. To lookup your NSF ID:

Click on the Lookup NSF ID link found under the Login button.

Enter your First Name, Last Name, Email Address and Organization (optional)

Select Submit

Your NSF ID will appear on the next screen. Make note of this NSF ID as this will be what you will use to login to the Graduate Research Fellowship System in the future.

![Figure 2: NSF ID Lookup Screen](image)

Retrieving a Forgotten Password

Click on the Forgot Password link found under the Login button. Refer to Figure 1 above.

You will be redirected to Research.gov. Click here to access the Research.gov Help System and learn more about the password functions.
Enter your NSF ID.

Click the Send Temporary Password button.

A confirmation screen will be displayed and the system will e-mail a temporary password to your registered e-mail address.

Once you receive the e-mail, authenticate by logging in to Research.gov with your Last Name, NSF ID, and temporary password.

To change your password, enter your temporary password, your New Password, and Confirm your New Password.

Click the Change Password button.

A confirmation screen will be displayed.

Click the Continue to FastLane button to return to FastLane.

**Changing Your Password**

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

You will be redirected to Research.gov. Click [here](#) to access the Research.gov Help System and learn more about the password functions.

Authenticate by logging in to Research.gov with your Last Name, NSF ID, and current password.

To change your password, enter your current password, your New Password, and Confirm your New Password.

Click the Change Password button.

A confirmation screen will be displayed.

Click the Continue to FastLane button to return to the GRFP home page.

**NOTE:** Password length must be between 6 and 20 characters. The password must contain at least one alphabetic and one numeric character. Passwords are not case sensitive. You cannot reuse the last three passwords you have used. Passwords expire every 365 days. Passwords for users with Financial Functions permissions expire every 120 days.

**Mandatory Password Change**

A Mandatory Password Change is required under any of the following conditions:
FastLane Help

You have not voluntarily or optionally changed your password prior to its expiration date every 180 days.

Your password has expired (every 180 days) or will expire within in 10 days.

You forgot your password and FastLane reset it.

You have already Self-Registered in FastLane.

Logging Out

Once you have logged into the GRFP application, a Logout link is available in the upper-right navigation bar.

Figure 7: Logout Link

To exit the application at any time, click on the Logout link. The web browser returns to the GRFP login page.

Understanding Your Profile

Your profile area details your current user profile information. Contact your SRO to make a request for changes to your profile. The list below describes each feature in your profile.

Figure 8: My Profile Screen

The list of all fields available in your profile and a description of each is described below:

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization</td>
<td>The Organization field indicates the university/college for which you are designated as a Coordinating Official or GRFP Financial Official. This field is not editable and may not be changed through the application.</td>
</tr>
<tr>
<td>Name</td>
<td>The Name field includes your first name, middle initial, last name, suffix, and maiden name. Your first and last names are required fields.</td>
</tr>
<tr>
<td>Email</td>
<td>The Email field is your primary email address and is used to send all system-generated and GRFP related emails. Please ensure your email address is kept up-to-date so that all electronic correspondence reaches you in a timely manner.</td>
</tr>
</tbody>
</table>
**Phone**

The Phone field is your primary phone number and will be used by GRFP for any telephone correspondence. Please ensure this phone number is kept up-to-date so that NSF may contact you, if needed.

---

**GRFP Officials Tasks**

**GRFP Officials Tasks**

Coordinating Officials, Financial Officials and their alternates manage all fellowship related activities including the Program Expense Report which is adjusted and submitted by GRFP Financial Officials. Once you have logged in, you will see links to all the tasks administered by a GRFP Official through the FastLane system in your Task Lists.

### Understanding Your Task List

Your task list area has two different sections. The “Task List” contains tasks that are pending your approval or that are currently due. These actions include: verify satisfactory progress/reserve status, approving tenure requests, approving travel requests, viewing a list of activities reports not yet submitted and adjusting/submitting a Program Expense Report.

The “Optional Task List” contains features that you may use and access at anytime. This functionality includes: viewing your organization's fellows for the current fellowship year, submitting Program Expense Reports for prior years, viewing grants roster reports, viewing Program Expense Reports, and viewing fellow information.

**Figure 9: CO Task List**

The list of all possible tasks that may appear in your task list and a description of each is provided below:

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Verify Satisfactory Progress/Reserve Status</td>
<td>The Verify Satisfactory Progress/Reserve Status task needs to be completed each year for fellows at your organization who are on tenure or on reserve. For fellows on tenure, this task allows you to submit a satisfactory or unsatisfactory rating for each fellow that is eligible to declare for the coming year. For fellows on reserve, you must submit a reserve verification. This task is available approximately January through May of each year.</td>
</tr>
<tr>
<td>Approve Fellowship Status Requests</td>
<td>The Approve Fellowship Status Requests task must be completed each time a fellow has submitted a tenure, organization, or field of study change request that requires your approval. The number of requests pending your approval is displayed next to the task.</td>
</tr>
<tr>
<td>Activities Reports Not Submitted</td>
<td>The Activities Reports Not Submitted provides a report of all fellow activities reports that have not yet been submitted. You may use this task to keep track of fellow progress on completing Activities Reports.</td>
</tr>
<tr>
<td>Task</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Adjust/Submit current year Program Expense Report</td>
<td>The Adjust/Submit Program Expense Report task must be completed once a year for new Program Expense Reports. This task allows you to view, adjust, and validate the yearly costs for the fellows at your organization. Please note that adjustments you make to the Fellow records in the Expense Report remain separate from individual Fellow records until the Report is approved. Individual Fellow records will be updated to reflect the changes made upon NSF approval.</td>
</tr>
<tr>
<td>Adjust/Submit Prior Year Program Expense Reports</td>
<td>Program Expense Reports for the four fiscal years prior the most recent fiscal year can be adjusted and resubmitted at any point. This task allows you to view, adjust, and validate the yearly costs for the fellows at your organization.</td>
</tr>
<tr>
<td>Adjust/Submit Fellow Completion Report</td>
<td>The Adjust/Submit Fellow Completion Report task must be completed once a year and can only be submitted by the Institutions Coordinating Official. This task allows you to provide fellow graduation data annually to the NSF.</td>
</tr>
<tr>
<td>View Fellowship Year Fellows Report</td>
<td>The View Fellowship Year Fellows Report task is available at all times. This task allows you to view a report of all fellows at your organization for the current fellowship year.</td>
</tr>
<tr>
<td>View Grants Roster Report</td>
<td>The View Grants Roster Report task is available at all times. This task allows you to view the current Grants Roster Report as well as previous Grants Roster Reports for your organization beginning with the 2008-2009 Fellowship Year.</td>
</tr>
<tr>
<td>View Program Expense Reports</td>
<td>The View Program Expense Reports task is available at all times. This task allows you to view all versions of the Program Expense Reports that exist for your organization. You may use this task to keep track of the details and status of Program Expense Reports that are modified and submitted by GRFP Financial Officials.</td>
</tr>
<tr>
<td>View Fellow Information</td>
<td>The View Fellow Information task is available at all times. This task allows you to view information on fellows associated with your organization. You may use this feature to view the fellow’s tenure records, previous tenure change requests, and previous travel requests.</td>
</tr>
</tbody>
</table>

**Managing Fellowship Status Requests**

Fellows may submit tenure change requests for their current year’s tenure at any time during the year. Fellows
may also request tenure changes while they are declaring their tenure plans for the next year. A tenure request includes changes to the fellow’s organization, field of study, or Fellowship Status. When a fellow at your organization submits a tenure request, you will be required to approve or disapprove the request. Once the fellow has submitted the request, you will be notified via email that a request has been submitted for your approval. After receiving the email notification, you may log into the GRFP application to review and take action on the request. Your task list will display the number of tenure requests pending your approval next to the Approve Fellowship Status Request link.

**Figure 10: Approve Fellowship Status Requests Link**

**Approving Fellowship Status Change Requests**

When you select to approve tenure change requests, a list of all pending requests is displayed. Once you select a request to approve, the details of the request will be displayed and you will have the option to approve or disapprove the request.

**To Approve a Tenure Change Request:**

1. Select Approve Fellowship Status Request link from your Task List.

   The list of all pending requests is displayed, including the fellow’s name, fellow id, the fellowship year the request is for, and the request date. The list of requests can be sorted by clicking any of the column headings in order to sort the list by that column.

**If You Wish to Search for a Specific Request:**

   Enter the fellow ID or the last name of the fellow whose request you wish to search for in the Search box area.

**Figure 11: Fellowship Status Requests Search Box**

Click the Search button.

The matching results are displayed in the requests list.

**Figure 12: Pending Fellowship Status Requests List and Open Request Icon**

Open a request by clicking on the open request icon.
The request details are displayed. The information that is displayed in the request details will vary depending on the type of tenure change request the fellow has submitted. In all cases, the old organization, field of study, or Fellowship Status will be displayed as well as the requested changes. For organization and Fellowship Status changes, an effective date and fellowship year start date will also be displayed.

![Image of Fellowship Status Change Request]

**Figure 13: Example Fellowship Status Change Request**

Click the Approve button.

If you are approving an organization change or a Fellowship Status change, an additional screen is displayed. This screen asks you to input the amount of stipend and cost-of-education allowance you will be paying the fellow prior to their transfer. If you are approving a field of study change, this screen will not be displayed.

![Image of Stipend and COE Questions]

**Figure 14: Stipend and COE Questions**
Enter the stipend and COE amounts.

WARNING: Enter the stipend and COE amounts you plan to pay the fellow for the fellowship year the change has been requested for. If a fellow is requesting a change to their organization or going on deferral for the next fellowship year, you should enter $0 for the stipend and COE amounts.

Click the Submit button.

A confirmation screen is displayed indicating you have successfully approved the tenure request. You may select the CO Home Page link to return to your homepage and task list. Once you have approved the tenure request, it will be forwarded to NSF for review and approval and the request will no longer appear in your pending tenure requests list. An email will also be sent to the fellow indicating that their CO has approved the request and that the request has been forwarded to NSF for approval.

NOTE: Mid-Year requests involving an Organization change require approval by Coordinating Officials at both Organizations prior to NSF approval. Start of Year requests involving an Organization change only require the approval of the Proposed Organization prior to NSF approval.

NOTE: The fellow’s tenure details will reflect the last approved status, whether the request is to occur immediately or occur in the future. If it is a tenure change request that has been approved to occur immediately, it will be reflected as such in the Current Fellow Status. If it is a tenure change request that has been approved to happen in the future (ex. The fellow is currently on tenure as of November but as of January they will be on reserve), the tenure details will reflect that they are on reserve (the last approved status), while the Current Fellow Status will reflect that they are on tenure (current status).

Disapproving Fellowship Status Requests

In some cases, it may be necessary to disapprove a change a fellow has requested. When you disapprove a fellow’s change request, an email is sent to the fellow with the disapproval notification and reason.

To Disapprove a Tenure Change Request:

Select the Approve Fellowship Status Request link from your Task List.

The list of all pending requests is displayed, including the fellow’s name, fellow id, the fellowship year the request is for, and the request date. The list of requests can be sorted by clicking any of the column headings in order to sort the list by that column.
Figure 15: List of Pending Fellowship Status Change Requests

Select a request to view by clicking the open request icon.

The request details are displayed. The information that is displayed in the request details will vary depending on the type of tenure change request the fellow has submitted. In all cases, the old organization, field of study, or Fellowship Status will be displayed as well as the requested changes. For organization and Fellowship Status changes, an effective date and fellowship year start date will also be displayed.

Click the Disapprove button.

The Disapproval Reason screen is displayed with a field available for you to enter the reason you are disapproving the change request. The reason you enter in this screen will be sent in a disapproval notification email that is sent to the fellow.

NOTE: The disapproval reason must be less than 255 characters.

Click the Submit button.

A confirmation screen is displayed indicating you have successfully disapproved the tenure request. You may select the CO Home Page link to return to your home page and task list. The request will no longer appear in your pending requests list. Once you have disapproved the tenure request, an email will be sent to the fellow informing them that their tenure change request has been disapproved. For mid-year change requests involving an Organization change, an email will also be sent to the Coordinating Official from the other Organization.

Managing Additional Funding Opportunities Requests

Starting with the 2013-2014 fellowship year, Fellows can submit requests for additional funding opportunities. When a fellow submits an additional funding opportunity request, you will be required to approve or disapprove the request. Additional funding opportunity requests submitted by fellows are first sent to COs for approval before being forwarded to NSF for approval. These items will be available in your task list once the Fellow has submitted the request. Your task list will display the number of funding opportunities requests pending your approval next to the Approve Additional Funding Opportunities Request link.
Approving Additional Funding Opportunities Requests

When you select to approve Additional Funding Opportunities Requests, a list of all pending requests is displayed. Once you select a request to approve, the details of the request will be displayed.

Once you have reviewed and approved the request, an email will be sent to the fellow and the Fellow informing them that the additional funding opportunities request has been approved by the Coordinating Official. The request will then move to NSF for final approval. After you have approved the request, it will no longer appear in your pending requests list.

Note: Selecting the Fellow ID link will open a new browser window displaying the Fellow’s detailed Fellowship Status record. You may view and edit historical tenure information from the Fellow’s detailed Fellowship Status record.
**Disapproving Additional Funding Opportunities Requests**

In some cases, it may be necessary to disapprove an additional funding opportunities request that a fellow has submitted. If you select to disapprove the request, the system will prompt you to enter a disapproval reason. Once you have entered the disapproval reason, an email will be sent to the fellow alerting him/her that the request has been disapproved and the reason for the disapproval. After the request has been disapproved, it is no longer available in your pending requests list.

![Disapproving Additional Funding Opportunities Request Screen](image1.png)

**Figure 11: Disapproving Additional Funding Opportunities Request Screen**

**Managing Activity Report Completion**

Coordinating Officials can track fellow’s completion of annual activity reports using the Activities Reports Not Submitted report system. In your Coordinating Official Task list, click Activities Reports Not Submitted.

![Activities Reports Not Submitted Link](image2.png)

**Figure 24: Activities Reports Not Submitted Link**

Select an academic year in the dropdown list to search, and click the Search button.
Figure 25: Activities Reports Not Submitted Academic Year Search

A list of the fellows who have not yet submitted their Activity Report for that fellowship year displays.

Figure 26: Activities Reports Not Submitted Report

Verifying satisfactory progress/reserve status

Each year, you are required to submit either a satisfactory or unsatisfactory rating for each of the fellows that are on tenure at your organization that are eligible to declare for the coming year. You must also submit a reserve verification for all fellows who are on reserve at your organization.

You will be notified via email each year to alert you as to when progress may be verified. Once you have received the email notification, you may logon to the GRFP application and the Verify Satisfactory Progress/Reserve Status link will be available in your task list. The task list will also display the number of fellows that have pending ratings.

Verifying Satisfactory Progress

A satisfactory progress rating for a fellow indicates that a fellow is making satisfactory progress in their studies and should be eligible to use tenure the next year. If a fellow is on tenure during the academic year, they must have a satisfactory rating verified for them before they are eligible to use tenure during the next academic year. Under the On Tenure “academic year” tab is the list of fellows that are eligible to use tenure the next year that need their progress verified. The academic year will change each year and will reflect the appropriate academic year for which you should review to verify satisfactory progress by the Fellow.

To Verify Satisfactory Progress:
Select the Verify Satisfactory Progress/Reserve Status link from your task list.

A list of all fellows who are on tenure, are eligible to declare for the coming year, and who have pending ratings is displayed. You may sort the list by clicking each of the column headings to sort the list by that column.
Figure 27: Fellow’s Rating List – On Tenure

Select the fellow(s) you wish to verify progress for by selecting the checkbox next to the fellow’s name.

If you wish to select all fellows, you may click the Select All button at the top of the checkbox column.

Figure 28: Select All Fellows Button

Click the Satisfactory button.

A screen is displayed which lists the selected fellows and the satisfactory progress statement.
Figure 29: List of Fellows and Satisfactory Rating Statement

Click the Agree and Submit button.

A confirmation screen is displayed indicating you have successfully verified satisfactory progress for the selected fellows. You may select the CO Home Page link to return to your home page and task list. Once you verified satisfactory progress for a fellow, that fellow will no longer appear in your pending ratings list.

Figure 30: Not Available Dialog Box

To View Faculty Advisor Form.

Select the ‘view’ hyperlink associated with the with fellow whose Faculty Advisor Form you wish to view. If the fellow has not yet uploaded a Faculty Advisor Form ‘Not Available’ will be displayed in this column.

Verifying Unsatisfactory Progress

An unsatisfactory rating for a fellow indicates that a fellow is not making satisfactory progress in their studies and should be not eligible to use tenure the next year until the issue is resolved. Once you have verified unsatisfactory progress for a fellow, NSF will be notified and may contact you to discuss the rating.

To Verify Unsatisfactory Progress:

Select the Verify Satisfactory Progress/Reserve Status link from your task list.
A list of all fellows who are on tenure, are eligible to declare for the coming year, and who have pending ratings is displayed. You may sort the list by clicking each of the column headings to sort the list by that column.

**Figure 31: Fellow’s Rating List – On Tenure**

Select the fellow you wish to verify progress for by selecting the checkbox next to the fellow’s name.

Once the fellow you wish to verify progress is checked off, Click the Unsatisfactory button. The system will then prompt you to enter a reason for the unsatisfactory progress.

**Figure 32: Declaring Unsatisfactory Progress**

Enter the reasons for unsatisfactory progress in the Unsatisfactory Progress Field (no more than 255 characters).

Press the Agree and Submit Button

A screen is displayed that confirms that you have successfully submitted an
unsatisfactory rating for a fellow.

![Figure 33: Confirmation of Unsatisfactory Rating](image1)

Click the Agree and Submit button.

A confirmation screen is displayed indicating you have successfully submitted an unsatisfactory progress for the selected fellow. You may select the CO Home Page link to return to your home page and task list. Once you verified unsatisfactory progress for a fellow, an email will be sent to NSF. NSF may then contact you to provide additional information regarding the fellow and reason for the rating.

**Submitting Reserve Verifications**

Each year, a reserve verification must be submitted for fellows who are on reserve at your organization. A reserve verification indicates that the fellow has been on reserve during the academic year and has not used any of their tenure. Under the On Reserve “academic year” tab is the list of fellows that are on reserve that need a pending reserve status verified. The academic year will change each year and will reflect the appropriate academic year for which you should review to verify reserve status by the Fellow.

To Submit a Reserve Verification(s):

Select the Verify Satisfactory Progress/Reserve Status link from your task list.

Select the On Reserve tab to display the list of fellows pending reserve verifications.

![Figure 34: On Reserve Tab](image2)

Select the fellow(s) you wish to submit a verification for by selecting the checkbox next to the fellow’s name.
If you wish to select all fellows, you may click the Select All button at the top of the checkbox column.
Click the Submit Reserve Verification button.  
A screen is displayed which lists the selected fellows and the reserve verification statement.

Click the Agree and Submit button.  
A confirmation screen is displayed indicating you have successfully submitted reserve verifications for the selected fellows.  You may select the CO Home Page link to return to your home page and task list.  Once you have submitted a reserve verification for a fellow, the fellow will no longer appear in your pending verifications list.

**Viewing the Fellowship Year Fellows Report**

The Fellowship Year Fellows Report is a real time report that details the fellows who are currently affiliated with your organization for the current fellowship year as well as each fellow’s eligibility for the next year of tenure.  You may view the report at any time using the Fellowship Year Fellows Report link in your task list.  All changes that are made to a fellow’s tenure for the current year will be reflected in this report upon approval of the changes.

**Figure 37: Fellowship Year Fellows Report Link**

TIP: It is recommended that you regularly check your fellows report to ensure that the list of fellows associated with your organization and their statuses is accurate.  Any inconsistencies should be reported to NSF for resolution.

To View the Fellowship Year Fellows Report:
1. Select the View Fellowship Year Fellows Report link from your task list.

The current Fellowship year’s Fellows Report is displayed. The report includes the fellow’s tenure information for the current fellowship year and indicates whether they are currently eligible for tenure for the next academic year. The report also displays whether they have declared tenure for the next academic year. You may sort the report by any of the columns by clicking the column heading.

![Sortable Column Headings](image)

Figure 38: Sortable Column Headings

If you would like to print the report, you can select the View PDF Print Format link. The report will be displayed in a separate window in Adobe PDF format.

![Fellowship Year Fellows Report](image)

Figure 39: Fellowship Year Fellows Report

NOTE: A fellow is eligible for tenure for the next academic year if they have used less than 36 months of tenure and have a satisfactory rating for the current academic year. For further details on eligibility, please refer to the NSF GRFP Officials’ Guide.

### Viewing Grants Roster Reports

When you log onto the GRFP system, the Grants Roster report may be accessible using the View Grants Roster under the Optional Task List. You may view current Grant Rosters and previously year’s Grants Roster Reports at any time using the View Grants Roster Reports link. This task allows you to review the university’s current Grant Roster Report and past years Grants Roster Reports. The Grant Roster Report is no longer required to be submitted annually. Previously submitted reports and version history is available in the Optional Task list.

The Grants Roster Report is an annual report that details the projected amount of money that your institution plans to obligate to students for the upcoming Fellowship year. Any changes to Fellow records should be reflected in the Program Expense Report for that year. Additionally, each
GRFP institution can view the Institution Financial Summary at any time via the Optional Task List.

To View a Grants Roster Report and its version history:

![Optional Task List]

**Figure 40: View Grants Roster Reports Link**

Select the View Grants Roster Report link from your Optional Task List.

The list of all year’s unsubmitted or submitted grants roster reports are displayed, including the current year’s report, the report status, the academic year of the report, and a link to view the grants roster report for each particular academic year. The list of reports can be searched to find a report from a particular academic year.

**NOTE:** A Grant Roster report will not be available for fellowship years where no fellows were associated to the institution for that particular year.

**NOTE:** Grants Roster reports are only available dating back to the 2008-2009 Fellowship Year. To view information on fellows prior to 2008-2009, access the View Fellow Information link.

![Table of Academic Years]

**Figure 41: View Grants Roster Reports Screen**

Select the link next to the academic year’s report for which you would like to see a version history.

The View Grants Roster Report screen displays. If a version history exists for a previously submitted report, the version history is listed at the top of the page. The version history lists general report information about each version of the report: adjust/submit date, report status, NSF review date, and a link to view that particular version of the report. The most current version of the report is automatically displayed.
below. All other unsubmitted reports will display the current Grant Roster information for all fellows associated with the institution.

![View Grants Roster Report Screen with Version History](image)

**Figure 42: View Grants Roster Report Screen with Version History**

To view the Financial Summary associated with a previously submitted Grants Roster Report, select the View Financial Summary button at the bottom of the screen.

**NOTE:** The View Financial Summary button is only available for previously submitted reports. All Unsubmitted reports will not display a link to View Financial Summary. To view the current Institution Financial Summary, navigate to that particular task in the Optional Task list.

**Managing Program Expense Reports**

Each year Financial Officials are required to submit a Program Expense Report for your organization that details the costs that were paid to each fellow at your organization for the year. The Program Expense Report includes a detailed cost listing for each fellow, regardless of their Fellowship Status for the year. The NSF will issue the report each year in the fall detailing the costs for the previous academic year. Coordinating Officials and alternates are able to review the report and make any adjustments that are needed. However, the Program Expense Report must be certified and submitted by the designated Financial Official. You are also able to adjust the past five years’ Program Expense Reports and resubmit them to the NSF for approval.

**Program Expense Report User Roles**

**Coordinating Officials:**

Each year, you will receive an email alerting you when the Program Expense Report is available for your review and validation. **AS A Coordinating Official, you will see the link to Adjust Program Expense Report when you log into the GRFP system.** The Program Expense Report for the most recent fellowship year will be available in your task list. During the time
the Expense Report submission period is open, you may use this link to review, and adjust the current year’s report for submission by the Financial Official.

Figure 43: Adjust Program Expense Report Link as CO

Financial Officials:
Each year, you will receive an email alerting you when the Program Expense Report is available for your review and validation. As a Financial Official, you will see the link to Adjust/Submit Program Expense Report link when you log into the GRFP system. The Program Expense Report can only be submitted by the designated Financial Official. You may also adjust and re-submit previously submitted Program Expense Reports.

Figure 44: Adjust/Submit Program Expense Report Link as FO

You may also review, submit, adjust and re-submit previously submitted Program Expense Reports for the four fiscal years preceding the current fiscal year. These prior Expense Reports can be accessed by selecting the Adjust/Submit Previous Year Program Expense Reports link from the Optional Task List.

Figure 45: Adjust/Submit Previous Year Program Expense Reports Link as FO

In addition to adjusting and submitting Program Expense Reports, you may also view Program Expense Reports at any time using the View Program Expense Reports link available in your optional task list. Each time you make changes to a Program Expense Report to submit to NSF for approval, the changes that you submit are saved as a unique report version that can be reviewed at a later date. This task allows you to review the current version of each Program Expense Report and the version history of each report for your university.
Figure 46: View Approved Program Expense Reports Link

TIP: For detailed explanation of the Program Expense Report, please refer to the GRFP Officials' Guide.

Adjusting and Submitting a Program Expense Reports

Only the designated Financial Official will have the permissions to submit the institutions Program Expense Report. All Coordinating Officials and their alternates have the ability to adjust and save changes to the Program Expense Report. If there are no changes when you review your Program Expense Report, you may choose to submit the report with no adjustments. If you wish to make adjustments to your Program Expense Reports (previously submitted or unsubmitted), you can change line item values and submit the modified report to NSF for review. The NSF will make the necessary adjustments to the fellow’s tenure records. When your report has been approved by NSF, both the Coordinating Officials and Financial Officials at your university will be notified via email and the report will be available in your Approved Program Expense Reports area.

To Adjust a Program Expense Report - Coordinating Officials and Financial Officials

COs - Select the Adjust Program Expense Report link from your task list.

FOs - Select the Adjust/Submit Program Expense Report link from your task list.

The Adjust/Submit Program Expense Report screen is displayed. This screen contains a list of the Program Expense Reports that have been generated for your university within the last five years and the associated academic year.

Figure 47: Adjust/Submit Program Expense Reports as FO

COs - Click the Adjust link for the expenditure link and the associated academic year that you wish to submit with adjustments.
FOs - Click the Adjust/Submit link for the expenditure link and the associated academic year that you wish to submit with adjustments.

The Program Expense Report for the chosen academic year is displayed.

![Program Expense Report](image)

**Figure 48: Program Expense Report and Adjust Link**

Select the Adjust link next to the fellow’s record for which you wish to adjust costs.

The fellow’s current stipend, COE, GROW, and other costs are displayed in editable form.

![Adjust Fellow Costs Screen](image)

**Figure 49: Adjust Fellow Costs Screen**

Enter your adjustments to the stipend, COE, GROW, and/or other costs and your
comments regarding the adjustment.

If you made changes to Fellowship Status or tenure months, you have the option of selecting Calculate to calculate the appropriate stipend and COE amounts for that fellow before saving the changes.

Note, the system will calculate the Stipend and COE amounts based on the fellow's months on Tenure. Only valid Stipend and COE amounts will be accepted:

- Stipend must equal months on tenure equivalent or equal $0
- COE must equal months on tenure equivalent or equal $0

Click the Save button.

The adjusted report is displayed. The adjusted fellow records are flagged with a Y in the Adj column. If you wish to view the original report without any adjustments reflected, you may click the View Program Expense Report Without My Adjustments button available at the bottom of the page.

![Figure 50: Adjusted Record Flag on the Program Expense Report With My Adjustments Screen](image)

Enter your comments on the entire report in the General Comments box.

Note: You may enter comments in the comments box to indicate if report is ready for submission or if additional adjustments or reviews are required. Comments can be overwritten or deleted.

You may return to the unsubmitted report to make additional adjustments

To Submit a Program Expense Report as a Financial Official

As a Financial Official, you may follow the instructions for adjusting a Program Expense Report and save your adjustments and comments without submitting the report by clicking the Save Report button.

Once you or the Coordinating Official have entered all your adjustments and comments and are ready to submit the report, you must sign the electronic certification to certify that the Program Expense Report records are an accurate representation of the accrued student expenses over the fellowship year.
Read and check the certification to agree that the report accurately reflects the expenses generated by NSF Graduate Fellows during the associated fellowship year. Make sure that your name displays accurately after “Electronically signed by:” and that the current date is listed.

Click the Submit Report button.

A confirmation screen is displayed indicating you have successfully submitted your Program Expense Report. You may select the Home Page link to return to your homepage and task list.

The submitted Program Expense Report is forwarded to NSF for review and approval. A report in submitted status cannot be modified further until NSF either approves or rejects the report. If NSF disapproves your report, both the Financial Officials and the Coordinating Officials at your university will be notified via email, and the report status will change in the Adjust/Submit Program Expense Reports list.

WARNING: If you have saved changes to a Program Expense Report or submitted a Program Expense Report to NSF, but NSF has not yet approved the report, it is possible that an NSF Official might modify a Fellowship Status record for a fellow for which you have submitted a modification in your Program Expense Report. If this occurs, the change made by the NSF Official will override the change for this fellow that you have made in your Program Expense Report, and the adjustment you have made will be removed from the system. If an adjustment you have made is removed in this way, you will receive a notification email. You must then log in and view your Program Expense Report to ensure that no further adjustments are needed to this fellow’s record. If your Program Expense Report was in Submitted status when this change occurred, the submitted report will be saved off and the status will be set at Rejected. You may then go in to the report, make any necessary adjustments and resubmit.

**Viewing Program Expense Reports**

To View a Program Expense Report and its version history:
Figure 52: View Program Expense Reports Link

Select View Program Expense Reports link from your Optional Task List.

The list of all year’s modified or submitted Program Expense Reports is displayed, including the current report status, the academic year of the report, and a link to view the version history of the Program Expense Report for that particular academic year. The list of reports can be searched to find a report from a particular academic year.

Figure 53: View Program Expense Reports Screen.

Select the link next to the academic year’s report for which you would like to see a version history.

The View Program Expense Report screen displays. If a version history exists for the particular report, the version history is listed at the top of the page. The version history lists general report information about each version of the report: adjust/submit date, report status, NSF review date, and a link to view that particular version of the report. The details of the most current version of the report are automatically displayed below. You can toggle back and forth between the various versions of the Program Expense Report by clicking the links in the version history table to view a particular version. Report versions record adjustments made by GRFP Officials, and the report status states whether those particular line item adjustments have been approved by NSF.

The report includes a list of the fellows, their tenure information, and their stipend, COE, GROW, and other costs for the year. You may sort the report by any of the columns by selecting the column heading. There is also a summary section at the bottom of the screen that details the total number of fellows for the year and the total costs.
Figure 54: View Program Expense Report Screen.

If you wish to print the report, select the View PDF Print Format link located at the bottom of the screen.

The Program Expense Report is displayed in a printable, Adobe PDF format in a separate window. You may then print the report using the PDF toolbar.

Managing Fellow Completion Reports

When the Fellow Completion Report task is open, Coordinating Officials may work on and submit a Fellow Completion Report for the organization that details the graduation status for each fellow for the current year and past years. The Fellow Completion Report includes a listing for each fellow who is associated to your institution. The NSF will issue the report detailing the list of fellows for the previous academic year that were associated to your institution in addition to the list of fellows from previous fellowship years (Beginning 2010 – 2011) that have not yet been marked with a final status. Financial Officials and alternates are able to review the report and make any adjustments that are needed. However, the Fellow Completion Report can only be certified and submitted by the designated Coordinating Official.

Fellow Completion Report User Roles

Coordinating Officials:
Each year, the system will generate a Fellow Completion Report and this report will be available for your review, validation and submission. As a Coordinating Official, you will see the link to Adjust/Submit the Fellow Completion Report in your Required Task List when you log into the GRFP system. The Fellow Completion Report can only be submitted by a designated Coordinating Official for your institution.
Financial Officials:
Each year, the system will generate a Fellow Completion Report and this report will be available for your review and validation in the Required Task list. As a Financial Official, you will see the link to Adjust the Fellow Completion Report when you log into the GRFP system. During the time the Fellow Completion Report submission period is open, you may use this link to review, update, and save each fellow’s graduation status and details.

Adjusting and Submitting a Fellow Completion Report

Only the designated Coordinating Official will have the permissions to submit the institution’s Fellow Completion Report. All Financial Officials and their alternates have the ability to adjust and save changes to the Fellow Completion Report. The Fellow Completion Report has four required fields for each fellow associated to the institution. All required fields must be completed for submission.

To Adjust Fellow Completion Report – Coordinating Officials and Financial Officials

COs - Select the Adjust/Submit Fellow Completion Report link from your Required Task List

FOs - Select the Adjust Fellow Completion Report link from your Required Task List

The Fellow Completion Report screen is displayed. This screen contains a list of all Fellows that are associated to your institution for the last fellowship year and any fellows that remain in “In Progress” status from previous fellowship years (beginning with Fellowship Year 2010 – 2011).

Review and provide updates for each fellow’s Graduate Program status. This report can be edited and saved by any GRFP official. The report must be certified and submitted by the institution’s designated Coordinating Official annually.

Changes to the fellow completion report will not update the fellow record or the fellow activities report.

The report has four required fields for each fellow record that you are required to edit or update.
Degree Status: Select the current degree status of the fellow. All fellows that are "In Progress" status will remain on the report until next year. Fellows that have transferred, Withdrawn or Graduated will be removed from next year’s report.

Graduate Program Start Date: Enter the date that the fellow began his/her Graduate Program in MM/YYYY format.

Degree Sought: This value is pre-populated from the Degree Sought field of the fellow’s annual Activity Report. If the fellow has not completed the annual Activity Report or has entered free form text for the Degree Sought field, you will need to make the appropriate selection from the dropdown menu.

Graduation Date: Enter the graduation date that the fellow will graduate in MM/YYYY format. This field is only required if the fellow’s degree status is marked as "Graduated".

Note: Fellows in Transferred, Graduated, or Withdrawn status will not appear on next year’s Fellow Completion Report. Any changes made to report which are not submitted to NSF will not be reflected in next year’s report.

NOTE: You may export the report to an excel document.

Click the Save button. As you make edits to the report, remember to save frequently. The report will timeout after 30 minutes of inactivity and changes that are not saved will be lost.

The Last Updated Date and Last Updated User will be displayed at the top of the report.

Enter your comments on the entire report in the General Comments box and select Save.
You may enter comments in the General Comments box to indicate to the next user if the report is ready for submission or if additional adjustments or reviews are required. Comments can be overwritten or deleted.

You may return to the report at any time to make additional adjustments.

To Submit a Fellow Completion Report, you must be a registered GRFP Coordinating Official for your institution.

Once a Financial Official or a Coordinating Official has updated all required fields in the Fellow Completion Report and provided comments, the report is ready for submission. A designated Coordinating Official must read and sign the electronic certification to certify that the report records accurately to the best of his/her knowledge.

A confirmation screen is displayed indicating you have successfully submitted your Fellow Completion Report. You may select the Home Page link to return to your home page and task list.

If edits are made to a Fellow Completion Report in “Submitted” status, the report status returns to “unsubmitted” once the new edits are saved.

A report in submitted status can be modified at any time during the submission window. You may edit, submit and re-submit the Fellow Completion Report until the deadline has passed.

NOTE: As a Coordinating Official, you must make edits and select Save to a submitted report in order to see the button to submit the report again.

**Viewing Award Financial Summary**

The Award Financial Summary module provides a summary of all fellows associated with the organization for the current fellowship year. In addition, the institution’s Active and Expired awards are displayed. From this view you will be able to view real-time Financial Summary information.

NOTE: Awards with an effective date of 2003 or later will display in the Financial Summary module. Awards with the effective date prior to 2003 will not be displayed.

To View the Award Financial Summary:

Select the View Award Financial Summary link from your task list.
The Award Financial Summary screen displays with the Institution Summary tab for the current fellowship year:

NOTE: The GRFP Fellowship Year begins on June 1 through May 31st. The Institution Summary funding details are reflective of the current fellowship year.

![Figure 59: View Award Financial Summary Link](image)

![Figure 60: View Award Financial Summary Screen - Institution Summary Tab](image)
On this screen, you are able to view the financial details of the current fellowship year with the total estimate of funding needs based on the current fellows Tenure Declaration. At the top of the Institution Summary tab, the Summary at a Glance table provides more information on the institution:

![Figure 61: Summary at a Glance](image)

NOTE: For accurate financial reporting and award recommendations, all GRFP Institutions must submit their Program Expense Report to NSF each year prior to the October deadline. If there has been a report submission, the previous year’s Program Expense Report will display as a hyperlink to the report once it is approved by NSF. New GRFP Institutions will not have an Program Expense Report available until the first submission at the end of the first Fellowship Year.

Below is a listing of the Summary at a Glance fields and their descriptions:

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Active Fellows (Summary at a Glance)</td>
<td>This number represents the total number of fellows, regardless of status, associated to the institution</td>
</tr>
<tr>
<td>Total Fellows On Tenure</td>
<td>This number represents the total number of fellows who have declared tenure.</td>
</tr>
<tr>
<td>Total Summer Start Fellows</td>
<td>This represents the total number of fellows who have declared as a Summer start fellow.</td>
</tr>
<tr>
<td>Total Fellows Not Yet Declared</td>
<td>This value represents the number of fellows that have not declared their Fellowship Status for the current fellowship year. Funds are not allocated for Fellows who have not declared their Fellowship Status. If the total number of fellows not declared is &gt; 0, the system will display a warning icon with more information.</td>
</tr>
</tbody>
</table>
This section will display a specific message based on the status of the last fellowship year program expense report. The following status may be displayed based on the current status of the previous years report:

- Program Expense Report Not Submitted
- Program Expense Report Submitted, not yet approved
- Program Expense Report PO Rejected
- Program Expense Report Not Required (New Inst. or Inst. w/o fellows from previous year)

Below is a sample screen of the Funding Details section on the Institution summary and a table with their appropriate descriptions:

**Figure 62: Funding Details**

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Fellows: 12-Month Tenure</td>
<td>This section details the total number of fellows and total funds for all fellows who require full tenure support. Please note, fellows in this category must be on Tenure for 12 months, and collecting full Stipend and full Cost of Education.</td>
</tr>
<tr>
<td>Stipend:</td>
<td>This row details the total number of fellows and funds that are collecting full Stipend for the current fellowship year.</td>
</tr>
<tr>
<td>Cost of Education Allowance</td>
<td>This row details the total number of fellows and funds that are collecting full cost of education for the current fellowship year.</td>
</tr>
<tr>
<td><strong>Subtotal Estimation of 12-Month Tenure Support Required</strong></td>
<td>This row details the total number of fellows and subtotal of funds for all fellows who require full tenure support.</td>
</tr>
<tr>
<td>-----------------------------------------------------------</td>
<td>--------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Total Fellows: Partial Support Tenure</strong></td>
<td>This section details the total number of fellows and total funds for all fellows who require partial tenure support. Please note, fellows in this category can either be on Tenure for less than 12 months, or collecting partial Stipend or partial Cost of Education.</td>
</tr>
<tr>
<td><strong>Stipend Partial Support:</strong></td>
<td>This row details the total number of fellows and funds for those that receive partial stipend support.</td>
</tr>
<tr>
<td><strong>Cost of Education Allowance Partial support:</strong></td>
<td>This row details the total number of fellows and funds for those that receive partial cost of education allowance.</td>
</tr>
<tr>
<td><strong>Subtotal Estimation of Partial Support Required:</strong></td>
<td>This row details the total number of fellows and subtotal of funds for all fellows who require partial support</td>
</tr>
<tr>
<td><strong>Total Fellows - Other Allowances</strong></td>
<td>Total fellows and funds for fellows that require funds in support of other allowances</td>
</tr>
<tr>
<td><strong>Other Allowances</strong></td>
<td>This amount refers to fellows that may require additional funds for GRFP approved allowances.</td>
</tr>
<tr>
<td><strong>Subtotal Estimation of Other Allowances Support Required</strong></td>
<td>This row details the total number of fellows and subtotal of funds that require Other Allowance support.</td>
</tr>
<tr>
<td><strong>Total Estimate</strong></td>
<td>This amount represents the total estimated funds required to support GRFP Fellows for the current fellowship year based on the calculation of all subtotal amounts.</td>
</tr>
<tr>
<td><strong>Balance From Previous Years</strong></td>
<td>This amount represents the Institution Balance Remaining from the Primary Award tab.</td>
</tr>
<tr>
<td><strong>Potential Recommended Funding</strong></td>
<td>This value is calculated to derive the projected institution funding to be recommended based on the current year’s Tenure Declaration amount and the previous year’s Institution Balance Remaining.</td>
</tr>
</tbody>
</table>

**NOTE:** Fellows who receive full stipend and full COE but are on tenure for less than 12 months are categorized as Partial Support Fellows and will be accounted for in the Partial Support section of the Institution Summary.

The Financial Summary screen displays an institution’s Active Awards as tabs across the top of the screen. Each tab displays the award activities, amendment and expenses which have occurred during the period of the award. The system will calculate the Institution’s Balance remaining using the funds carried over from previous awards and the award activities.

1. To view detailed information for a particular award, select the award tab you wish to view:
At the top of each award tab, the Award Details table provides more information on the Award:

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Award Start Date:</td>
<td>The effective date of the Award</td>
</tr>
<tr>
<td>Award End Date:</td>
<td>The expiration date of the Award</td>
</tr>
<tr>
<td>Total Awards:</td>
<td>Cumulative amount issued by NSF to date to the organization under the current award</td>
</tr>
<tr>
<td>Total Expenditures:</td>
<td>Cumulative amount of expenses reported to NSF to date during the award effective dates.</td>
</tr>
<tr>
<td>Carryover from Previous Award</td>
<td>This is the carryover amount from the previous award’s Institutions Balance Remaining.</td>
</tr>
<tr>
<td>Institution Remaining Balance:</td>
<td>This is the current balance of funds the institution has on hand based on the total awards made minus total expenditures and adjustments based on the carryover amounts from previous awards.</td>
</tr>
<tr>
<td>Award Level FFR submitted as recorded in NSF FAS as of DD/MM/YYYY:</td>
<td>Financial expenditures as recorded against the Current Award and submitted via the FastLane/Financial Functions.</td>
</tr>
</tbody>
</table>

Below the Award Details section, a list of the detailed funding transactions is provided in a table on the Award tab screen. The funding transactions included award activities, amendments and expenses which have occurred during the period of the Award. The Institution’s Balance Remaining is calculated with the funds carried over from previous awards and the award transactions.
**Figure 65: Funding Transactions**

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annual Institution Report</td>
<td>Fellowship expenses as reported by the Organization through the GRFP System’s Program Expense Report. Annual institution expenses are used to calculate the Institution’s Remaining Balance. If there are Program Expense Reports that have not been submitted in the award period, the Institution Remaining Balance will be inaccurate. Reports should be submitted for the missing years to ensure an accurate budget accounting.</td>
</tr>
<tr>
<td>Tenure Declaration</td>
<td>Projected expenses for the upcoming fellowship year as reported on your Organization’s Grants Roster Report.</td>
</tr>
<tr>
<td>Award Amendments</td>
<td>Each Award Amendment posted against the base award is displayed as a separate line item in the corresponding award tab.</td>
</tr>
<tr>
<td>Program Office Adjustments</td>
<td>Program Office Adjustments are amounts determined by the GRF Program Office in conjunction with the Institution.</td>
</tr>
</tbody>
</table>

The Institution Balance Remaining reflects the current balance of funds the institution has on hand based on the total awards made minus total expenditures and adjustments based on the carryover amounts from previous awards.

The Award History tab displays a historical view of an institution’s Awards, including Active and Expired awards. The Total Obligations, Expenditures and Remaining Balance are shown for each award.
Figure 66: Award History Screen

Viewing Funding Recommendation Memos

The Funding Memo tab provides a link to View/Delete a recommendation memo for any associated funding memos for each specified institution.

View/Edit Award Financial Summary link

Search for an Organization using the Search button

Click the View/Edit link

Click the Funding Memos tab on the View Award Financial Summary page

Click the View link for the specified institution and Award ID

Open or Save the Funding Memo PDF

Figure 67: Search and View Institution Financial Summary
Viewing Fellow Information

You may view tenure and travel information about the fellows who are associated with your organization using the View Fellow Information link available in your task list. You may view a fellow’s tenure records for each year, tenure change requests, and additional funding opportunities requests.

To View Fellow Information:

Select the View Fellow Information link from your task list.

A list of all fellows at your organization is displayed, including the fellow’s name, fellow id, field of study, fellow status, Fellowship Status, and the year they were awarded. You may sort this list by selecting the column heading of any of the columns to sort the list by that column. A search box is also available in this screen if you wish to search for a specific fellow.
To Search for a Specific Fellow:

Enter a fellow id, fellow last name, and/or fellow first name.

Click the Search button.

The matching results are displayed.

Select a fellow to view by selecting the View link next to the fellow’s record.

The fellow’s record is displayed. There are four tabs of information available for you to view: Profile, Fellowship Status Details, Tenure Changes, Additional Funding Opportunities, and Travel Requests. The fellow’s profile is the tab that will be displayed when you first select to view the fellow’s record.
Select the Fellowship Status Details tab to view the fellow’s tenure records.

The fellow’s tenure records are displayed. You may sort the list by selecting the column header for the column by which you wish to sort.

Select the View link next to the Fellowship Status record for which you wish to view details.

The tenure details for the tenure you record you selected are displayed. There are sections for the school information, tenure information, cost information, and update information.
Figure 71: Tenure Record Details Screen

NOTE: The fellow’s tenure details will reflect the last approved status, whether the request is to occur immediately or occur in the future. If it is a tenure change request that has been approved to occur immediately, it will be reflected as such in the Current Fellow Status. If it is a tenure change request that has been approved to happen in the future (ex. The fellow is currently on tenure as of November but as of January they will be on reserve), the tenure details will reflect that they are on reserve (the last approved status), while the Current Fellow Status will reflect that they are on tenure (current status).

Select the Tenure Changes tab to view previous tenure change requests the fellow has submitted.

The list of tenure changes the fellow has previously requested or which are currently pending is displayed. The list includes the fellowship year the change was for, the request date, the fellow’s organization, and the request status. You may sort the list by selecting the column heading of the column by which you wish to sort.

Figure 72: List of Fellowship Status Change Requests Screen

Select the View link next to the tenure change for which you wish to view details.

The request details are displayed, including a request summary, change information, the reason for the request, cost information, and update information.
Select the Travel Requests tab to view previous travel allowance requests the fellow has submitted.

The list of travel requests the fellow has previously submitted or which are pending is displayed. The list includes the fellowship year the request was submitted for, the request date, the fellow’s organization, and the request status. You may sort the list by selecting the column heading of the column by which you wish to sort.

Select the View link next to the travel request for which you wish to view details.

The historical travel request details are displayed, including a request summary, change information, the departure information, the return information, the reason for the request, and update information.
Figure 75: Travel Request Details Screen

9. Select the Additional Funding Opportunities tab to view previous Additional Funding Opportunities requests the fellow has submitted.

**Fellow User Guide**

**Fellow User Guide  Conventions used**

in this guide

The names of on-screen features appear in bold.
EXAMPLE: Click on the Search tab.

Uniform Resource Locators (URLs) underlined and are in blue font.
EXAMPLE: Type the following address in your browser's address bar: [http://fastlane.nsf.gov](http://fastlane.nsf.gov).

Many software features and some business processes are explained in a reference table format. An on-screen term appears in the left column and a description of the term appears in the right column.
EXAMPLE:

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fellow ID</td>
<td>The Fellow ID is the number assigned to you when you become a fellow.</td>
</tr>
</tbody>
</table>

The following three conventions serve as both examples and descriptions:

**WARNING:** Warnings provide information designed to prevent critical errors from occurring. If you see a warning, stop and read it before continuing.

**NOTE:** While Notes do not describe critical information, we suggest that you stop and read them, too. The information in a note can prevent minor errors from occurring. Other notes simply provide information designed to deepen your understanding of a software feature.

**TIP:** Tips provide information designed to increase your productivity.

**Getting Access**

**Getting Access**

**Logging In**

Access the GRFP application by typing the following address into your browser address bar: [http://FastLane.nsf.gov/grfp](http://FastLane.nsf.gov/grfp). Click on the Graduate Research Fellowship link of the left hand side of the page.

![Fellow Log In](image)

*Figure 1: Fellow Log In*

Type your FastLane user name in the **User Name** field.

Type your FastLane password in the **Password** field.

Click the **Login** button.

The GRFP home page appears with your Fellows Task List and current Fellow Data.

**Resetting a Password**
If you have forgotten your password you have two options for resetting your password:

The system can e-mail a temporary password to the e-mail address provided at account creation.

If your e-mail address has changed since account creation, you can reset your password by confirming the answers to two secret questions.

To have the system e-mail you a temporary password:

Click on the **Forgot Password?** link found under the Login button.

The retrieve password screen is displayed.

![Figure 2: Forgot Password Screen](image)

To reset your password using the secret questions and answers feature:

Type your User Name in the **User Name** field.

Type your registered e-mail address in the **Email Address** field.

Click on the **Email Password** button.

A confirmation screen will be displayed and the system will e-mail you a temporary password to the e-mail address you provided.

To reset your password using the secret questions and answers feature:

Type your User Name in the **User Name** field.

Type your registered e-mail address in the **Email Address** field.

Click on the **Reset Password** button.

The Secret Questions screen appears.
FastLane Help

Figure 3: Secret Questions Screen

Enter the answers corresponding to the questions you selected for Resetting your Password

Click the Submit button. The Reset Password screen appears

Figure 4: Reset Password Screen

Enter your new password and confirm the password.

Click the Submit button.

If the question and answer combinations provided match what is on file, your password will be reset to the new password entered.

Changing Your Password

Click the Change Password link from the upper-right navigation bar.

Figure 5: Change Password Link

The Rules of Behavior screen is displayed.
The Rules of Behavior page will be displayed. This page is used to ensure that you understand the rules of behavior involved with interacting with a government computer system. You are required to read and accept the rules of behavior before continuing through the Password Update Process. Click the “I have read and accept the Rules of Behavior”, and click the Accept button (pictured below).

![Figure 6: Rules of Behavior Screen](image)

The Change Password screen is displayed.

![Figure 7: Change Password Screen](image)

Enter your old password, your new password, and confirm your new password. Click the Submit button.

A confirmation screen is displayed indicating you have successfully changed your password. You may select the Fellows Home Page link to return to your fellowship task list.
NOTE: Password length must be between 6 and 20 characters. The password must contain at least one alphabetic and one numeric character. Passwords are case sensitive. You cannot reuse the last three passwords you have used. Passwords expire every 365 days. Passwords for users with Financial Functions permissions expire.

Retrieving Your User Name

If you have forgotten your user name you have two options for retrieving your user name:

The system can e-mail your user name to the e-mail address provided at account creation.

If your e-mail address has changed since account creation, you can retrieve your user name by confirming the answer to one secret question.

To have the system e-mail you your user name:

Click on the Forgot Username? link found under the Login button.

The retrieve username screen is displayed.

![Forgot Username Screen](image)

Figure 8: Forgot User Name Screen

Type your Last Name in the Last Name field.

Type your First Name in the First Name field.

Type your registered e-mail address in the Email Address field.

Type the First Line of your Registered Street Address in the First Line of Street Address field.

Click on the Email Username button.

A confirmation screen will be displayed and the system will e-mail you your User Name.

To retrieve your user name using the secret questions and answers feature:
FastLane Help

Enter the information in steps 4-7 above.

Click on the **Retrieve Username** button

The Secret Questions screen appears.

![Figure 9: Secret Questions Screen](image)

Enter the answer corresponding to the question you selected for Retrieving your User Name.

Click the **Submit** button.

If the question and answer combination match what is on file, your User Name appears.

![Figure 10: Retrieve User Name Screen](image)

**Mandatory Password Change**

A Mandatory Password Change is required under any of the following conditions:

- You have not voluntarily or optionally changed his/her password prior to its expiration date every 180 days.
- Your password has expired (every 180 days) or will expire within in 10 days.
- You forgot your password and FastLane reset it.
- You have already Self-Registered in GRFP.

**Logging Out**

Once you have logged into the GRFP application, a **Logout** link is available in the upper-right navigation bar.
To exit the application at any time, click the Logout link. The web browser returns to the GRFP login page.

Understanding Your Fellows Task List

Your fellowship task list describes the current outstanding actions you must complete to manage your fellowship. The Fellows Task List contains required actions that must be completed to continue forward with your fellowship. The Fellows Optional Task List contains optional tasks that can be accessed at any time during your fellowship. Fellows who are on tenure abroad must complete additional tasks available in the Fellows Abroad Task List.

Note: Certain Fellow tasks are only available during certain periods of the year. For these tasks you will see an inactive link followed by the dates this task will be available to users.

Once a required action has been completed, the task will be removed from your Fellows Task List. The list below describes the various tasks you may see in your required or optional task list throughout your fellowship.

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accept/Decline Award</td>
<td>The Accept/Decline Award task is a required task that needs to be completed upon the initial award of your fellowship. It is available once the awards have been issued through the award acceptance deadline.</td>
</tr>
<tr>
<td>Declare Fellowship Status Plans</td>
<td>The Declare Fellowship Status Plans task is a required task that must be completed each year of your fellowship. This task allows you to indicate your tenure plans for the following year and request changes to your organization or field of study for the next year.</td>
</tr>
<tr>
<td>Task</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Submit Activities Report</td>
<td>The Submit Activities Report task is a required task that must be completed for every year that you are on active tenure. This task allows you to submit a summary of your activities for the year and provide feedback on the GRFP program.</td>
</tr>
<tr>
<td>View/Amend Submitted Activities Reports</td>
<td>The View/Amend Submitted Activities Reports task is an optional task that allows you to view and append additional information to any of your Activities Reports that are in a submitted state. This link is not displayed if your Fellowship Status is awardee or declined.</td>
</tr>
<tr>
<td>View Submitted Fellowship Status Change Requests</td>
<td>The View Submitted Fellowship Status Change Requests task is an optional task that allows you to view all of the submitted tenure change requests throughout your fellowship tenure period. The task is always available.</td>
</tr>
<tr>
<td>View/Print Fellowship Award Offer Letter</td>
<td>The View/Print Fellowship Award Offer Letter task is an optional task that allows you to view/print your fellowship award offer letter. The task is available once you have been awarded a Fellowship Offer Award. (Note: this task is available to those awardees that have been awarded from 2005 and later.)</td>
</tr>
<tr>
<td>Update My Profile</td>
<td>The Update My Profile link allows you to update your personal profile information including, name, Open Researcher and Contributor ID (ORCID), mailing contact information, and permanent contact information. If you are Abroad, you must make changes to personal profile information by submitting a Starting Certificate.</td>
</tr>
<tr>
<td>Reset Secret Questions</td>
<td>The Reset Secret Questions screen allows you to select from a series of Questions and provide answers to allow for resetting your Password or retrieving your Username at a later date should the need arise.</td>
</tr>
<tr>
<td>View Fellowship Status Details/Request Tenure Change</td>
<td>The View Fellowship Status Details/Request Tenure Change link allows you to both view your tenure records for the current and previous years, and to request a change to your tenure. (See Section 2.5 for more information).</td>
</tr>
<tr>
<td>Prepare Fellows Abroad Information</td>
<td>The Prepare Fellows Abroad Information task is available in your Fellows Abroad Task List when you are on tenure at an abroad institution. The task allows you to submit, view and edit your Fellows Abroad Starting Certificate, Payment Enrollment Form, and Termination Certificate while your abroad. This task is available once your tenure change request to go abroad has been authorized. Once a Termination Certificate is submitted, this task list item will no longer appear in the Fellows Abroad Task List.</td>
</tr>
</tbody>
</table>
Check Status of Fellows Abroad Information

The Check Status of Fellows Abroad Information task is available in your Fellows Abroad Task List when you are on tenure at an abroad institution. The task allows you to view the Submission Status/Description of your Fellows Abroad Starting Certificate, Payment Enrollment Form, Termination Certificate and Enrollment Verification. This task is available once your tenure change request to go abroad has been authorized. Once a Termination Certificate is submitted, this task list item will no longer appear in the Fellows Abroad Task List.

View Fellows Abroad Information

The View Fellows Abroad Information task is available in your Fellows Abroad Task List when you are on tenure at an abroad institution. The task allows you to view the associated tenure years Fellows Abroad information. This task is available once your tenure change request to go abroad has been authorized. This task remains available even after a fellow completes abroad tenure.

View/Submit Fellows Abroad Travel Certificate

The View/Submit Fellows Abroad Travel Certificate task is available in your Fellows Abroad Task List when you are on tenure at an abroad institution. The task allows you to submit your travel certificate to get your one time travel stipend. This task is available once your tenure change request to go abroad has been authorized. This task remains available even after a fellow completes abroad tenure.

Understanding Your Fellow Data

Your fellow data area details your current user profile information and your current tenure details. The list below describes each feature in your fellow data area.

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>User Profile (Name, ORCID, Address, Phone, and E-mail)</td>
<td>The User Profile area contains your current name, Open Researcher and Contributor ID (ORCID), mailing address, phone number, and e-mail address. This mailing contact information is used for all correspondence that is sent to you through the GRFP application and by the NSF GRFP office. It is very important that you keep this information up-to-date.</td>
</tr>
<tr>
<td>Year Awarded</td>
<td>The Year Awarded field indicates the year your Fellowship was awarded. For example, if you were issued a fellowship award beginning in the 2003-2004 academic year, your Year Awarded would be 2003.</td>
</tr>
<tr>
<td>Field Name</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Tenure Months Used</td>
<td>The Tenure Months Used field indicates the number of months of tenure you have used through the current academic year. Tenure months must be used in increments of 12 months except in special deferral circumstances. At the start of each year you are on tenure, your Tenure Months Used will increase by 12 months.</td>
</tr>
<tr>
<td>Reserve Months Used</td>
<td>The Reserve Months Used field indicates the number of months of reserve you have used through the current academic year. Reserve months must be used in increments of 12 months except in special deferral circumstances. At the start of each year you are on reserve, your Reserve Months Used will increase by 12 months.</td>
</tr>
<tr>
<td>Forfeit Months Used</td>
<td>The Forfeit Months Used field indicates the number of months of forfeit you have used through the current academic year.</td>
</tr>
<tr>
<td>Travel Allowance Used</td>
<td>The Travel Allowance Used field indicates the amount of your travel allowance you have used in the past. If you have not used Travel prior to 2010 – 2011 this field will be $0. Travel requests are not permitted after the 2010 – 2011 fellowship year.</td>
</tr>
<tr>
<td>CO and CO Email</td>
<td>The CO and CO Email fields indicate your current Coordinating Official and their email address. Your CO is based on the organization you are currently affiliated with.</td>
</tr>
<tr>
<td>Fellow Status</td>
<td>The Fellow Status field indicates your current fellow status. The values for this field include: Active: Indicates you have an active fellowship Awardee: Indicates you have been issued a fellowship award but have not yet accepted the fellowship offer Deferred: Indicates you are currently on medical or military deferral Retired: Indicates you have completed your fellowship Terminated: Indicates you have chosen to terminate your fellowship</td>
</tr>
<tr>
<td>Fellowship Status</td>
<td>The Fellowship Status field indicates your Fellowship Status for the current academic year. The values for this field include: <strong>Awarded</strong>: Indicates you have been awarded a fellowship that you have not yet accepted  <strong>Completed</strong>: Indicates you have completed your fellowship</td>
</tr>
</tbody>
</table>
Declined: Indicates you were offered a fellowship award which you chose to decline

Forfeited: Indicates you have forfeited tenure for the current academic year. This status is only valid once if you have used more than 24 months of reserve

On Medical Deferral: Indicates you are on medical deferral for the current academic year

On Military Deferral: Indicates you are on military deferral for the current academic year

On Reserve: Indicates you are on reserve for the current academic year

On Tenure: Indicates you are on tenure for the current academic year

Pending CO Approval: Indicates you have a change request that has not yet been approved by your CO

Pending NSF Approval: Indicates you have a change request that has not yet been approved by NSF

Terminated: Indicates you have chosen to terminate your fellowship

Award Accepted: Indicates you have accepted your award, but have not yet declared tenure.

Organization
The organization field indicates the organization you are affiliated with for the current fellowship year.

Field of Study
The Field of Study indicates the field of study you are associated with for the current fellowship year.

Understanding Your Fellowship Status Details

Your Fellowship Status Details area is available through the “View Fellowship Status Details/Request Tenure Change” link in the Fellows Optional Task List on your home page. The Fellowship Status Details area displays each of your past tenure records and your tenure plan for the following year. You also have the ability to request a change to your current year or next year tenure from this screen.

Figure 13: Fellowship Status Details Screen
The list below describes the features of the Fellowship Status Details area.

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fellowship Year</td>
<td>The Fellowship Year field indicates the academic year associated with the Fellowship Status record.</td>
</tr>
<tr>
<td>Organization</td>
<td>The Organization field indicates which organization you were associated with for the Fellowship Status record.</td>
</tr>
<tr>
<td>Abroad?</td>
<td>The Abroad field indicates if you were a Fellow Abroad during the tenure period. You are considered a Fellow Abroad if you are associated with a foreign organization.</td>
</tr>
<tr>
<td>Field of Study</td>
<td>The Field of Study field indicates your field of study during the tenure period.</td>
</tr>
<tr>
<td>Fellowship Status</td>
<td>The Fellowship Status field indicates your Fellowship Status for the given tenure period. (See Section 2.4 for an explanation of each Fellowship Status)</td>
</tr>
<tr>
<td>Fellowship Year Start</td>
<td>The Fellowship Year Start field indicates the start of the tenure period for the given Fellowship Status record which is either Summer or Fall.</td>
</tr>
<tr>
<td>Tenure Months Used</td>
<td>The Tenure Months Used field indicates the number of months you used for the given Fellowship Status record.</td>
</tr>
<tr>
<td>Reserve Months Used</td>
<td>The Reserve Months Used field indicates how many months the fellow has used for reserve.</td>
</tr>
<tr>
<td>Forfeit Months Used</td>
<td>The Forfeit Months Used field indicates how many months a fellow has used for forfeit.</td>
</tr>
<tr>
<td>Stipend Used</td>
<td>The Stipend Used field indicates the amount of stipend you were paid during the tenure period.</td>
</tr>
<tr>
<td>COE Used</td>
<td>The COE Used field indicates the amount of cost-of-education you were paid during the tenure period. (For an explanation of COE, please refer to the Information Booklet. You will find the Information Booklet as a Quick Link on the left hand side of the screen after you have logged into the system as a fellow. Once you have clicked on the link for the Information Booklet you will see that it is referred to as Information for Graduate Research Fellows and will be able to view it as a PDF, a DOC, or HTML.)</td>
</tr>
<tr>
<td>Travel Used</td>
<td>The Travel Used field indicates the amount of travel allowance you were paid during the tenure period.</td>
</tr>
<tr>
<td>GROW Used</td>
<td>The GROW Used field indicates the amount of any Graduate Research Opportunities Requests awarded during this period.</td>
</tr>
</tbody>
</table>
Accepting and Declining Award

Accepting and Declining Award

Once you have been notified that you have received a fellowship award, you may access the GRFP application to accept or decline your award offer. The Accept/Decline Award link will be available in your Fellows Task List until you have taken action to accept or decline the award or until the deadline for award acceptance. Prior to accepting or declining your award, your Fellow Data will reflect a fellow status of Awardee and a Fellowship Status of Awarded.

Accepting an Award

The process for accepting an award is a three-step process, which consists of Accepting Your Award, Providing an E-Signature and lastly printing the Certification Page for your records. The application will guide you through each step you need to complete in order to accept your award.

To Accept Your Award:

Select the Accept/Decline Award from the Fellows Task List.

Select the ‘I accept the fellowship award offered me’ radio button.

Figure 14: Accept Award Button

Click the Continue button.

The E-Signature screen appears and displays the E-Signature Instructions, and the Certifications that you must certify so that you can accept your GRFP award. You may click the “View” link next to the E-Signature Instructions to see detailed instructions and definition of certification terms.

Read all Certifications carefully and check the boxes next to each certification. By checking each certification, you are certifying that statements made therein are true and complete to the best of your knowledge; and
agreeing to accept the obligation to comply with NSF award terms and conditions.

Figure 15: E-Signature Screen

NOTE: If you have already completed the e-Signature as part of the application submission process, this step will allow you to view the certification as you completed it at that time. Click the “Continue” button to proceed to the next step.

Once all checkboxes are checked, press the Sign and Accept button.

The Print Certification Page screen is displayed.

Select the View PDF link.

Figure 16: Print Certification Page Screen and Link

The certification page Adobe PDF document is displayed in a new window. You may print the page using the PDF print icon to save for your personal records.

After completing the award acceptance, fellow status will be changed to Active and your Fellowship Status will be changed to Award Accepted.

Declining an Award

In order to decline your award, you must complete the first step of the Accept/Decline Award task.

To Decline Your Award:

Select the Accept/Decline Award link from the Fellows Task List.

Select the ‘I decline the fellowship award offered me’ radio button.
Figure 17: Decline Your Award Radio Button

Click the **Continue** button.

The Decline Award Confirmation and Decline Reasons page is displayed.

Select the reason(s) for declining the award from the **decline reasons list**.

Figure 18: Decline Reasons Screen

Click the **Decline Award** button.

A confirmation screen is displayed indicating you have successfully declined your award. Your fellow status will change to Declined and your Fellowship Status is changed to Declined.

**View/Print Fellowship Award Offer Letter**

The View/Print Fellowship Award Offer Letter link is provided so that you are able to view/print your fellowship award offer letter. The link will become available in your Fellows Optional Task List once you have been awarded a fellowship offer. The Fellowship Award Offer Letter is viewable and printable in Adobe PDF format.

To View the Fellowship Award Offer Letter:

Click the **View/Print Fellowship Award Offer Letter** link.
Figure 19: Fellows Task List Screen

The View/Print Fellowship Award Offer Letter Screen displays.

To View the Fellowship Award Offer letter in PDF format, click the **View PDF** button in the upper right hand corner of the View/Print Fellowship Award Offer Letter screen.

Figure 20: View/Print Fellowship Award Offer Letter Screen

**NOTE:** The View/Print Fellowship Award Offer Letter task is available to those awardees that have been awarded from 2005 and later.

View/Print Application Reviews
FastLane Help

The **View/Print Application Reviews** link will be available in your Application Package Optional Task List once reviews are posted in the GRFP system. Click on this link so that you can View/Print the Application Reviews. Click the **View/Print Application Reviews** link.

![Figure 21: View/Print Application Reviews Link](image)

To view the Application Reviews in a printable Adobe PDF version, click the View/Print Review link. This feature is only available after application submission and reviews have been posted in the GRFP System. Please note your Application Reviews will be available in the GRFP system for a limited period of time. It is recommended that you print or save a copy of the Application Reviews PDF for your records.

To View the reviews in PDF format, click the **View/Print Review** link.

<table>
<thead>
<tr>
<th>Application Year</th>
<th>Application Status</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>Award Offered</td>
<td>View/Print Review</td>
</tr>
</tbody>
</table>

1 item found.
Declaring Fellowship Status Plans

Each year, you must declare your tenure plans for the next academic year. The Declare Fellowship Status Plans link will be available in your Fellows Task List until you have taken action to declare your plans or until the deadline for tenure plans declaration has passed. Once you have declared your tenure plans for the next year, a new Fellowship Status record will be reflected in your Tenure Details area.

The process for declaring your tenure plans is a three-step process. The application will guide you through each step you need to complete in order to declare your tenure plans. A Progress indicator is located on the right hand side of the page, indicating which steps you have completed and which steps are remaining.

To Declare Your Fellowship Status Plans:

Select the Declare Fellowship Status Plans link from the Fellows Task List.

The E-Signature screen appears and displays the E-Signature Instructions, and the Certifications that you must certify so that you declare your tenure plans. You may click the "View" link next to the E-Signature Instructions to see detailed instructions and definition of certification terms.

Read all Certifications carefully and check the boxes next to each certification. By checking each certification, you are certifying that statements made therein are true and complete to the best of your knowledge; and agreeing to accept the obligation to comply with NSF award terms and conditions.
Figure 22: Verify Organization and Field of Study Screen

Select the Yes radio button to indicate that the organization and field of study listed are correct.

Figure 23: Verify Organization and Field of Study Screen

**TIP:** To request a change to your organization or field of study, please refer to Sections 4.1 and 4.2 of this guide.

Click the Continue button.

The **Enter Fellowship Status Plans** screen appears and displays your options for your next fellowship year.
Figure 24: Enter Fellowship Status Plans Screen

TIP: For an explanation of the various Fellowship Status options and rules regarding each, please refer to the Information Booklet.

Select your Fellowship Status for the next year.

If you are currently On Tenure, you may select to:

- **Continue on Tenure**
- Reserve the Next Year (if less than 24 months of reserve used)
- Forfeit the Next Year (if more than 24 months of reserve used)
- Medical Deferral
- Military Deferral
- Terminate Your Fellowship

TIP: To request a year of reserve, medical or military deferral or to terminate your fellowship, please refer to Section 4.3, 4.4, 4.5, and 4.6 of this guide.

If you are currently On Reserve or On Deferral, you may select to:

- Begin Fellowship Status in the Summer Term
- Begin Fellowship Status in the Fall Term
- Reserve the Next Year (if less than 24 months of reserve used)
- Forfeit the Next Year (if more than 24 months of reserve used)
- Medical Deferral
- Military Deferral
- Terminate Your Fellowship

Click the **Continue** button.

The Review and Submit screen appears and displays the data you have entered for your organization, field of study, and tenure for the next year.
Figure 25: Review and Submit Fellowship Status Plans Screen

If You Wish to Change any of the Selections:

Click the Edit link next to the selection you wish to change.

The screen for the organization, field of study, or tenure plans you have selected to change is displayed.

Enter the change you wish to make.

Click the Continue buttons until the Review and Submit screen is displayed.

Click the Submit button.

A confirmation screen is displayed indicating you have successfully submitted your tenure plans. You may select the Fellows Home Page link to return to your home page and task list.

Changing Your Organization

The organization you are affiliated with when you access the Declare Tenure Plans module is based on your current academic year organization. You may request a change to this organization while declaring your tenure plans for the next year. Changes to your organization require approval by the Coordinating Official at the organization to which you are transferring, and NSF. (For Fellows Abroad, approval is only required by NSF.) To Request a Change to Your organization:

Select the Declare Fellowship Status Plans link from the Fellows Task List.

The Verify Organization/Field of Study screen appears and displays the organization and field of study you are currently affiliated with.

Select to the No radio button to indicate that the organization listed is not correct.
Figure 26: Verify Organization and Field of Study ‘No’ Radio Button

Click the Continue button.

The current organization and field of study are displayed with the ability to edit each.

Select your new organization from the drop down list.

Figure 27: Verify Organization Screen

NOTE: If the organization you wish to select is not included in the drop down list select Other (Specify in Reason for change text area) from the drop down list and specify the new organization in the change reason text area along with the Reason for change.

The new organization is displayed in the organization field.

Enter a reason for the change.

Click the Continue button.

The Enter Fellowship Status Plans screen appears and displays your options for tenure.
Figure 28: Enter Fellowship Status Plans Screen

Select the radio button of the tenure option you wish to choose.

If deferring tenure, enter the reason for the request.

Click the Continue button.

The Review and Submit screen appears and displays the data you have entered for your organization, field of study, and tenure for the next year.

Figure 29: Review and Submit Fellowship Status Plans Screen

Click the Submit button.

A confirmation screen is displayed indicating you have successfully submitted your tenure plans. You may select the Fellows Home Page link to return to your home page and task list.

After declaring your tenure plans, your Fellowship Status in your Fellow Data section will appear as Pending Proposed CO Approval until your organization change request has been approved by a Coordinating Official at the new organization. Once this Coordinating Official
has approved the organization change request, your request will be forwarded to NSF for approval and your Fellowship Status will be changed to Pending NSF Approval. Once your organization change request has been approved by NSF, your tenure status for the next tenure year will be updated to reflect your selection. (For Fellows Abroad, approval is only required by NSF.)

**Changing Your Field of Study**

The field of study you are affiliated with when you access the Declare Fellowship Status Plans module is based on the field of study you are associated with during the current academic year. You may request a change to this field of study while declaring your tenure plans for the next year. Changes to your field of study require approval by your Coordinating Official and NSF. To request a Change to Your Field of Study:

Select the **Declare Fellowship Status Plans** link from the Fellows Task List.

The Verify Organization/Field of Study screen appears and displays the organization and field of study you are currently affiliated with.

![Verify Organization and Field of Study Screen](image)

**Figure 30: Verify Organization and Field of Study Screen**

Select the **No** radio button to indicate that the field of study listed is not correct.

Click the **Continue** button.

The current organization and field of study are displayed with the ability to edit each.

![Field of Study Change Screen](image)

**Figure 31: Field of Study Change Screen**

Select your new field of study from the **field of study drop down list**.
NOTE: If the field of study you wish to select is not included in the drop down list, select the appropriate discipline with the words Other (specify) from the drop down list and specify the field of study in the Other Field of Study text box.

Enter a reason for the change.

Click the **Continue** button.

The Enter Fellowship Status Plans screen appears and displays your tenure options the next year.

![Figure 32: Enter Fellowship Status Plans Screen](image)

Select the **radio button** for the tenure option you wish to choose.

If deferring tenure, enter the reason for the request.

Click the **Continue** button.

The Review and Submit screen appears and displays the data you have entered for your organization, field of study, and tenure for the next year.

Click the **Submit** button.
A confirmation screen is displayed indicating you have successfully submitted your tenure plans. You may select the Fellows Home Page link to return to your home page and task list.

After declaring your tenure plans, your Fellowship Status in your Fellow Data section will appear as Pending CO Approval until your field of study change request has been approved by your Coordinating Official. Once your Coordinating Official has approved the field of study change request, your request will be forwarded to NSF for approval and your Fellowship Status will be changed to Pending NSF Approval. Once your field of study change request has been approved by NSF, your tenure status for the next tenure year will be updated to reflect your selection. (For Fellows Abroad, approval is only required by NSF.)

**Going on Reserve**

In certain circumstances it may be necessary for you to go on reserve during your GRFP fellowship. You may request to go on reserve for the next year while declaring your tenure plans. Reserve requests require approval by your Coordinating Official and NSF. (For Fellows Abroad, approval is only required by NSF.)

**TIP:** For an explanation of reserve status and rules regarding going on reserve, please refer to the Information Booklet.

**To Request a Year of Reserve:**

Select the **Declare Fellowship Status Plans** link from the Fellows Task List.

The Verify Organization/Field of Study screen appears and displays the organization and field of study you are currently affiliated with.

Select the Yes radio button to indicate that the organization and field of study listed are correct.

Click the **Continue** button.
The Enter Fellowship Status Plans screen appears and displays your tenure options for the next year.

Select the **Reserve the next year** radio button.

Enter the reason for the request.

Click the **Continue** button.

The Review and Submit screen appears and displays the data you have entered for your organization, field of study, and tenure for the next year.
Figure 36: Review and Submit Fellowship Status Plans Screen

Click the Submit button.

A confirmation screen is displayed indicating you have successfully submitted your tenure plans. You may select the Fellows Home Page link to return to your home page and task list.

After declaring your tenure plans, your Fellowship Status in your Fellow Data section will appear as Pending CO Approval until your reserve request has been approved by your Coordinating Official. Once your Coordinating Official has approved the reserve request, your request will be forwarded to NSF for approval and your Fellowship Status will be changed to Pending NSF Approval. Once your reserve request has been approved by NSF, your tenure status for the next tenure year will be updated to On Reserve. (For Fellows Abroad, approval is only required by NSF.)

Going on Medical Deferral

In certain circumstances it may be necessary for you to defer your GRFP fellowship due to a medical condition. You may request a medical deferral while declaring your tenure plans. Medical deferral requests require approval by your Coordinating Official and NSF. (For Fellows Abroad, approval is only required by NSF.)

TIP: For an explanation of medical deferrals and rules regarding deferring, please refer to the Information Booklet.

To Request a Medical Deferral:

Select the Declare Fellowship Status Plans link from the Fellows Task List.

The Verify Organization/Field of Study screen appears and displays the organization and field of study you are currently affiliated with.

Select the Yes radio button to indicate that the organization and field of study listed are correct.

Click the Continue button.
Figure 37: Verify Organization and Field of Study Screen

The Enter Fellowship Status Plans screen appears and displays your tenure options for the next year.

4. Select the Medical Deferral radio button.

Figure 38: Medical Deferral Radio Button

Enter the reason for the request.

Click the Continue button.

The Review and Submit screen appears and displays the data you have entered for your organization, field of study, and tenure for the next year.
Figure 39: Review and Submit Fellowship Status Plans Screen

Click the **Submit** button.

A confirmation screen is displayed indicating you have successfully submitted your tenure plans. You may select the Fellows Home Page link to return to your home page and task list.

After declaring your tenure plans, your Fellowship Status in your Fellow Data section will appear as Pending CO Approval until your medical deferral request has been approved by your Coordinating Official. Once your Coordinating Official has approved the medical deferral request, your request will be forwarded to NSF for approval and your Fellowship Status will be changed to Pending NSF Approval. Once your medical deferral request has been approved by NSF, your tenure status for the next tenure year will be updated to On Medical Deferral. (For Fellows Abroad, approval is only required by NSF.)

**Going on Military Deferral**

In certain circumstances it may be necessary for you to defer your GRFP fellowship due to an obligation of military duty or deployment. You may request a military deferral while declaring your tenure plans. Military deferral requests require approval by your Coordinating Official and NSF. (For Fellows Abroad, approval is only required by NSF.)

**TIP:** For an explanation of military deferrals and rules regarding deferring, please refer to the Information Booklet.

To Request a Military Deferral:

Select the Declare Fellowship Status Plans link from the Fellows Task List.

The Verify Organization/Field of Study screen appears and displays the organization and field of study with which you are currently affiliated.

Select the Yes radio button to indicate that the organization and field of study listed are correct.

Click the Continue button.
Figure 40: Verify Organization and Field of Study Screen

The Enter Fellowship Status Plans screen appears and displays your tenure options for the next academic year.

Select the Military Deferral radio button.

Figure 41: Military Deferral Radio Button

Enter the reason for the request.

Click the Continue button.

The Review and Submit screen appears and displays the data you have entered for your organization, field of study, and tenure for the next year.
Click the Submit button.

A confirmation screen is displayed indicating you have successfully submitted your tenure plans. You may select the Fellows Home Page link to return to your home page and task list.

After declaring your tenure plans, your Fellowship Status in your Fellow Data section will appear as Pending CO Approval until your military deferral request has been approved by your Coordinating Official. Once your Coordinating Official has approved the military deferral request, your request will be forwarded to NSF for approval and your Fellowship Status will be changed to Pending NSF Approval. Once your military deferral request has been approved by NSF, your tenure status for the next tenure year will be updated to On Military Deferral. (For Fellows Abroad, approval is only required by NSF.)

**Terminating Your Fellowship**

If you would like to discontinue your fellowship prior to using your three years of tenure, you may choose to terminate your fellowship. You may request to terminate your fellowship while declaring your tenure plans for the next year. Termination requests require approval by your Coordinating Official and NSF.

TIP: For an explanation of terminating your fellowship, please refer to the Information Booklet.

To Terminate Your Fellowship:

Select the **Declare Fellowship Status Plans** link from the Fellows Task List.

The Verify Organization/Field of Study screen appears and displays the organization and field of study with which you are currently affiliated.

Select the **Yes** radio button to indicate that the organization and field of study listed are correct.

Click the **Continue** button.
Figure 43: Verify Organization and Field of Study Screen

The Enter Fellowship Status Plans screen appears and displays your options for your first year of tenure.

Select the **Terminate My Fellowship** radio button.

Figure 44: Terminate My Fellowship Radio Button

Enter the reason for the request.

Click the **Continue** button.

The Review and Submit screen appears and displays the data you have entered for your organization, field of study, and tenure for the next year.

Click the **Submit** button.

A confirmation screen is displayed indicating you have successfully submitted your tenure plans. You may select the Fellows Home Page link to return to your home page and task list.
After declaring your tenure plans, your Fellowship Status in your Fellow Data section will appear as Pending CO Approval until your termination request has been approved by your Coordinating Official. Once your Coordinating Official has approved the termination request, your request will be forwarded to NSF for approval and your Fellowship Status will be changed to Pending NSF Approval. Once your termination request has been approved by NSF, your tenure status will be updated to Terminated. (For Fellows Abroad, approval is only required by NSF.)

**Requesting a Fellowship Status Change**

**Requesting a tenure Change**

In some circumstances, it may be necessary to request a change to your tenure during the academic year. Tenure changes include changes to your Fellowship Status, organization, or field of study. You may also use the Request Tenure Change feature to request a change to your tenure for the next academic year. The ability to request changes to your tenure for the next academic year is available once you have declared your tenure plans. All tenure change requests require approval by your Coordinating Official and NSF. Changes to organization require approval by Coordinating Officials at both the current and the proposed organization. (For Fellows Abroad, approval is only required by NSF.)

**Changing Your Organization**

To Request a Change of organization:

Select the **View Fellowship Status Details/Request Fellowship Change** link from your Fellows Optional Task List.

![Figure 44: View Fellowship Status Details Link](image-url)
All of your tenure records for your fellowship are displayed. A **Request Change** link is available next to each Fellowship Status record that you have the ability to change. You may not request a change to a fellowship year that has ended.

**Figure 45: Fellowship Status Details Screen**

Select the **Request Change** link next to the Fellowship Status record for which you wish to request a change.

The Request Fellowship Status Change screen is displayed.

**Figure 46: Request Fellowship Status Change Screen**

Select your **new organization** from the drop down list.

**NOTE:** Only enter an Organization in the New Organization field if your Organization is changing. If you enter an Organization that matches your current Organization, you will receive an error message when selecting Submit.
NOTE: If the organization you wish to select is not included in the drop down list select Other (Specify in Reason for change text area) from the drop down list and specify the new organization in the change reason text area along with the Reason for change.

The new organization is displayed in the organization field.

The Request Fellowship Status Change screen is displayed and the organization you selected is displayed in the New Organization field.

Enter the effective date of the organization change using the calendar icon. A calendar is displayed in a separate window and allows you to select a date.

Figure 47: Calendar Window

TIP: The Start Date should be entered as the date you would like to officially change your fellowship from one organization to another. Up through the effective date, you will continue to receive stipend payments from your current organization. After the effective date, your stipend payments will be made through the new organization.

Enter the reason for the change.

Click the Submit button.

A confirmation screen is displayed indicating you have successfully submitted the change request. You may select the Fellows Home Page link to return to the home page and your task list. Changes to organization require approval by both a Coordinating Official at your current institution, and approval by a Coordinating Official at the institution proposed in your request (For Fellows Abroad, approval is only required by NSF.) In your Fellow Data section, your Fellowship Status for the Fellowship Status record for which you request the change, will reflect a status of Pending CO Approval until your Coordinating Official has approved the request. Once your CO has approved the request, your Fellowship Status will be updated to reflect a status of Pending Proposed CO Approval. Once a Coordinating Official at the new organization has approved your request, the tenure request will be forwarded to NSF for approval, and your Fellowship Status will be updated to Pending NSF Approval. Finally, once NSF has approved the request, your Fellowship Status will return to the previous status it was before the request was submitted. A new Fellowship Status record will also be added for the fellowship year to reflect the change in your organization. Your current organization will be updated to the new organization once you’re the tenure effective date included in the request has passed.
Changing Your Field of Study

To Request a Change to your Field of Study:

1. Select the View Fellowship Status Details/Request Tenure Change link from your Fellows Optional Task List.

   ![View Fellowship Status Details Link](image1.png)

   **Figure 48: View Fellowship Status Details Link**

   All of your Fellowship Status records for your fellowship are displayed. A Request Change link is available next to each Fellowship Status record that you have the ability to change. You may not request a change to a fellowship year that has ended.

2. Select the Request Change link next to the Fellowship Status record for which you wish to request a change.

   ![Request Change Link](image2.png)

   **Figure 49: Request Change Link**

   The Request Tenure Change screen is displayed.
Select the new field of study from the **New Field of Study** drop-down list.

**NOTE:** Only enter a Field of Study in the New Field of Study field if your Field of Study is changing. If you enter a Field of Study that matches your current Field of Study, you will receive an error message when selecting Submit.

Figure 50: **New Field of Study Drop-Down List**

Enter the effective date of the field of study change using the calendar icon.

A calendar is displayed in a separate window and allows you to select a date.

Figure 51: **Calendar Window**

Enter the reason for the change.

Click the **Submit** button.

A confirmation screen is displayed indicating you have successfully submitted the
change request. You may select the Fellows Home Page link to return to the home page and your task list. In your Fellow Data section, your Fellowship Status for the Fellowship Status record for which you request the change, will reflect a status of Pending CO Approval until your Coordinating Official has approved the request. Once your CO has approved the request, your Fellowship Status will be updated to reflect a status of Pending NSF Approval. Once NSF has approved the request, your Fellowship Status will return to the previous status it was before the request was submitted and the Fellowship Status record will be updated to reflect the new field of study. (For Fellows Abroad, approval is only required by NSF.)

Changing Your Fellowship Status

To Request a Change to your Fellowship Status:
Select the View Fellowship Status Details/Request Tenure Change link from your Fellows Optional Task List.

Figure 52: View Fellowship Status Details Link

All of your Fellowship Status records for your fellowship are displayed. A Request Change link is available next to each Fellowship Status record that you have the ability to change. You may not request a change to a fellowship year that has ended.

Select the Request Change link next to the Fellowship Status record that you wish to change.
Figure 53: Request Change Link

The Request Tenure Change screen is displayed. The tenure statuses that you may request a change to are displayed in the **New Fellowship Status** drop-down box.

**TIP:** For an explanation of the various tenure options and rules regarding each, please refer to the Information Booklet.

Select the New Fellowship Status from the New Fellowship Status drop-down list.

Figure 54: New Fellowship Status Drop-Down List

**NOTE:** Only enter a Fellowship Status in the New Fellowship Status field if your Fellowship Status is changing. If you enter a Field of Study that matches your current Field of Study, you will receive an error message when selecting Submit.

Enter the effective date of the Fellowship Status change using the calendar icon. A calendar is displayed in a separate window and allows you to select a date.
Enter the reason for the change.

Click the Submit button.

A confirmation screen is displayed indicating you have successfully submitted the change request. You may select the Fellows Home Page link to return to the home page and your task list. In your Fellow Data section, your Fellowship Status for the Fellowship Status record you request the change for, will reflect a status of Pending CO Approval until your Coordinating Official has approved the request. Once your CO has approved the request, your Fellowship Status will be updated to reflect a status of Pending NSF Approval. Once NSF has approved the request, you Fellowship Status will be updated to reflect the new status you have requested. (For Fellows Abroad, approval is only required by NSF.)

View Submitted Fellowship Status Change Requests

The View Submitted Fellowship Status Change Requests link will be available in your Fellows Task List. To View the Submitted Fellowship Status Change Requests, Click on the View Submitted Fellowship Status Change Requests link.

Welcome Fellows

The View Submitted Fellowship Status Change Requests screen will appear. The View Fellowship Status Change Requests screen will appear so that you can view all of your tenure change requests that you have submitted. The Submitted Tenure
Change Requests screen will provide you with information pertaining to the Request Date, Date the Change is Effective, affected Fellowship Year, Organization, and the Status of the Request.

NOTE: For tenure change requests involving a mid-year transfer of Organization, the Status of the Request after submission will first read Pending CO Approval as the CO at your Current Organization must first approve the request. After the CO at your current Organization has approved the request, the CO at your proposed Organization must approve the request and your request status will be Pending Proposed CO Approval. Following Proposed CO approval, the request status will be Pending NSF Approval.

To view a particular tenure change request, click the View link in the action column. The link will provide you with the information pertaining to the Request Date, Date the Change is Effective, affected Fellowship Year, Organization, the Status of the Request and the Reason for the Request.

![View Fellowship Status Change Requests Screen](image)

Figure 57: View Fellowship Status Change Requests Screen

The Fellowship Status Change Request screen will appear.
Fellows have the option of submitting requests for Additional Funding Opportunities available to Graduate Research Fellowship Program Fellows. Each Funding Opportunity has a unique application format and application period. The system will guide you through each step needed to submit your Additional Funding Opportunity Request.

**Submitting an Additional Funding Opportunities Request**

To submit an additional Funding Opportunity Request:

Click the **Submit Additional Funding Opportunities Request** link from your Fellows Optional Task List.
Select the Funding Opportunity type in Step 1 of the Application process and select continue. (A dropdown list of Agencies to select from appear if the Graduate Research Internship Programs option is selected)

Complete the application form, ensuring that you have completed all required information and select Continue. Required fields are marked with an asterisk.

If a document upload is required, select the browse button and locate the file you wish to upload. Select the upload button and the PDF conversion process will begin. Once the document has been uploaded, proofread the PDF file in your browser window and select Accept to complete the upload process.

Review the application information on the Review and Submit Request screen. If all information is complete, select the Submit button to submit your request for approval.
Submitting Additional Funding Opportunities Requests

Fellows have the option of submitting requests for Additional Funding Opportunities available to Graduate Research Fellowship Program Fellows. Each Funding Opportunity has a unique application format and application period. The system will guide you through each step needed to submit your Additional Funding Opportunity Request.

**Submitting an Additional Funding Opportunities Request**

To submit an additional Funding Opportunity Request:

Click the **Submit Additional Funding Opportunities Request** link from your Fellows Optional Task List

Select the Funding Opportunity type in Step 1 of the Application process and select continue
Complete the application form, ensuring that you have completed all required information and select Continue. Required fields are marked with an asterisk. 

NOTE: If the Graduate Research Internship Program option is selected a drop down list of agencies to select from will appear.

If a document upload is required, select the browse button and locate the file you wish to upload. Select the upload button and the PDF conversion process will begin. Once the document has been uploaded, proofread the PDF file in your browser window and select Accept to complete the upload process.

Review the application information on the Review and Submit Request screen. If all information is complete, select the Submit button to submit your request for approval.
Withdrawing an Additional Funding Opportunities Request

Fellows have the option of withdrawing requests for Additional Funding Opportunities before the application is submitted to the CO for approval. Once the application has been submitted, however, the application can only be cancelled from an administrator.

To submit an additional Funding Opportunity Request:

Click the View Submitted Additional Funding Opportunities Request link from your Fellows Optional Task List

View the record of the application to be withdrawn

Select the Withdraw button and select Yes on the confirmation page.
Note: The application is withdrawn and an auto generated email will be sent to the CO advising them of the transaction.

Note: Once an application is withdrawn it is deleted from the system.

**Submitting Activities Reports**

**Submitting Activities Reports**

Each year of your fellowship, you are required to submit an activities report. The **Submit Prior Fellowship Year Activities Report** link will be available in your Fellows Task List until you have submitted your report for the year. It is important to note that you are required to submit an activity report for the prior tenure period before you attempt to submit your tenure declaration for the upcoming fellowship year. If the submission period to submit activity reports has passed, and you have not yet submitted your activities report, you must do so by clicking the **View or Amend Submitted Activities Reports/Add Activities Report for Previous Fellowship Year** link and choosing the option to add a report for the previous year.

The Activity Report is a ten step process. The application will guide you through each step you need to complete in order to submit your activities report. As you complete the steps, you have the ability to navigate within the different sections you have completed. You may do this by clicking on the title header of each section.

**Submitting An Activity Report**

To Submit an Activities Report:

  - Click the **Submit Prior Fellowship Year Activities Report** link from your Fellows Task List.

  The Background Information screen is displayed as seen below. You are required to enter your background information for each year.

  Enter your Background Information in the fields provided.

  a. All required fields for the form are marked with an asterisk.
Click the **Save and Continue** button. The skills screen is displayed as seen below:
Figure 63: Skills screen
Enter your Research skills, Professional Skills, Preparation for Career for the given year.

For each of the sections if “I was NOT engaged in the activities listed below during this reporting period” is selected, none of the other boxes in that particular section can be selected.

All required fields for the form are marked with an asterisk.

Click the **Save and Continue** button. The International Experience Screen is displayed as seen below:

![International Experience Screen](image)

**Figure 64: International Experience screen**

Select "Yes" or "No" to indicate whether or not you have taken part in any international experiences during the reporting period.

If "No" is selected, select the Save and Continue button. If "Yes", is selected, select "Add International Experience" to enter your International Experiences. The Add International Experience screen will display as seen below:
Figure 65: Add New International Experience screen

Enter your International Experience for the given year.

Select the Type of International Experience (check all that are relevant)

Enter the Country in which the Experience took place

Enter the duration of the International Experience (for example if the duration is 2 months, enter 1-2)

Check all of the achievements that are associated with your International Experience

Click **Save** button to navigate to Achievements screen To

Edit an International Experience:

Select the **Edit** link next to the International Experience you wish to update.
The International Experience is displayed with the ability to make changes to the information you previously entered.

Enter the changes you wish to make.

Click the Save button.

The updated experience is displayed on the International Experience page.

To Delete an International Experience:

Select the Delete link next to the International Experience you wish to remove.

Select "Yes" when asked if you are sure you wish to delete the International Experience.

The International Experience is removed from your list.

Click the **Save and Continue** button.

The Achievements screen is displayed.

Select "Yes" or "No" to indicate whether or not you have any Achievements to report for the reporting period.
If "No" is selected, select the Save and Continue button to advance to the next step.

If "Yes", select an Achievement type and select "Add Achievement" to enter your Achievement. The Add Achievement screen is displayed.

Figure 68: Achievements screen

Enter the Achievement in the text box per the instructions provided.

Select the Save button.

The Achievements screen will display with the entered Achievement in the Achievements table.

Select the Save button to navigate to the next screen Career Plans.

Figure 69: Add Achievements Screen

To View an Achievement:

Select the View link next to the Achievement you wish to view.
Figure 70: View Achievements Link

The achievement is displayed with the ability to make changes to the information you previously entered.

Enter the changes you wish to make.

Click the Save and Continue button.

The updated achievement is displayed on the Achievements page.

To Edit an Achievement:

Select the Edit link next to the Achievement you wish to update.

Figure 71: Edit Achievement Link

The achievement is displayed with the ability to make changes to the information you previously entered.

Enter the changes you wish to make.

Click the Save button.

The updated achievement is displayed on the Achievements page.

To Delete an Achievement:
Select the Delete link next to the achievement you wish to remove.

Select "Yes" when asked if you are sure you wish to delete the Achievement.

The achievement is deleted from your achievements list.

Figure 72: Delete Achievement Link

The Career Plans screen is displayed

Enter your updated Career Plans.

Enter your Expected Graduation Date

Select your primary choice for the type of employment you are pursuing

Click Save & Continue button to navigate to Internships screen. The Internships screen is displayed

Figure 73: Career Plans Screen

Check ‘Yes’ or ‘No’ to indicate whether you “Have you taken part in any internship(s) lasting 1 month or more with industries or businesses, government laboratories or agencies, or nonprofit organizations during this reporting period?” and select ‘Add Internship’ button to add Internship. It will expose new content as shown in the below screen
If ‘No’ is selected, select the Save and Continue button to advance to the next step.

If "Yes", select "Add Internship" to enter your Internships.

![Internship screen]

Figure 74 : Internship screen

To Add to Internships:
Enter the Company/Agency/Organization
Enter the duration of the Internship (for example if the duration is 2 months, enter 1-2)
Select the relevant Internship Contributions
Click Save button

The Internships screen will be displayed with the entered Internship displayed

g. Select the Save and Continue button to navigate to the next step

Figure 75: Add Internship Screen

To Edit Internships:
Select the Edit link next to the Internship you wish to update
**FastLane Help**

**Figure 76: Edit Internships Link**

The Internships is displayed with the ability to make changes to the information you previously entered.

Enter the changes you wish to make.

Click the Save button.

The updated internship is displayed.

To Delete an Internship:

Select the Delete link next to the Internship you wish to remove.

Select 'yes' when asked if you are sure you wish to delete the Internship.

The Internship is removed from your Internship list.

Click the Save and Continue button. The Other Financial Support page is displayed.

**Figure 77: Delete Internship Link**

The Other Financial Support Screen is displayed.

Select 'Yes' or 'No' to indicate if you have received any fellowships (other than GRFP), scholarships or grants during the reporting period.

If 'No' is selected, select the Save and Continue button to proceed to the next step.

If 'Yes' is selected, select "Add Fellowship" to enter your Fellowships.

The Add Fellowship Screen is displayed.
To Add a Fellowship:

Enter the short title of the Fellowship, Scholarship or Assistantship
Enter the year awarded
Enter the Source of Support
Click Save button to navigate to Stipend Feedback screen

To Edit Fellowships:
Select the **Edit** link next to the Fellowship you wish to update

![Figure 80: Edit Other Financial Support Link](image)

The Other Financial Support is displayed with the ability to make changes to the information you previously entered.

- Enter the changes you wish to make.
- Click the Save button.

The Other Financial Support screen is displayed with the updated entry.

**To Delete a Fellowship:**

- Select the **Delete** link next to the Fellowship you wish to remove.
- Select 'yes' when asked if you are sure you wish to delete the Fellowship.
- The Internship is removed from your Fellowship list.
- Click the Save and Continue button.

![Figure 81: Delete Other Financial Support Link](image)

The Stipend Feedback page is displayed as seen below.

- Enter Stipend Feedback for the given year by entering all of the required information.
- Click Save & Continue button to navigate to next screen Additional Funding Opportunities
To add Additional Funding Opportunities:
Answer Yes to the question: Did you receive any NSF GRFP Additional Funding Opportunities during this reporting period?
Click the Add Additional Funding Opportunity button
Select the Additional Funding Opportunity type from the drop down list
Click the Continue button
Browse and upload an associated document (if needed). Proofread and accept document
Click the Save and Continue button to navigate to the next screen Fellowship Year Summary
The Fellowship Summary screen is displayed as shown below.

Enter Fellowship Summary for the given year. To enter a Fellowship
Summary you may either:

Enter the text in the required field; or Upload a 1 page document which will be converted to PDF

To Upload a document for the Activity Report

Click the Upload button to begin the upload process.

The PDF Conversion/Compliance Check screen is displayed. Please be patient, this process may take a few minutes. Every 15 seconds this page will refresh to check the status of your file.

During the upload process, your file is converted to a PDF. After successful conversion, the File is Ready for Proofreading screen is displayed.

Proof-read the converted PDF file. Click the Proofread PDF button to proofread the converted file.

A new window is opened to display the PDF file. Pay special attention to check that all figures, graphics, tables, margins, page breaks, and other special formatting options have been accurately preserved.

The Proofreading Complete screen is displayed.

Click the Accept button to accept the converted PDF file (However, if you detected any problems in the PDF file, you can cancel the upload by clicking on the Cancel button. You may then correct the errors and resubmit the corrected version of your document.)

The prior screen, from which the upload was initiated, is displayed and a View PDF link is now displayed on the screen for your uploaded document- (if the Accept button was clicked in step c).

NOTE: The uploaded Fellowship Summary should not exceed 1 page in length

Click Save & Continue button to navigate to Submit Screen
The Submit Report screen is displayed. At this time, you may submit your report or you may save the information and submit the report at a later date.

Review your report and select Edit to return to any screen that you wish to edit.
To submit your report to NSF, click the Submit button.

Viewing or Amending a Submitted Activities Reports

The View or Amend Submitted Activities Reports task allows you to view and append information to any of your activities reports that are in a submitted state. This task permits you to view a selected submitted activities report or to add further information, via a free text area, after submission. A time and date stamp will also be included with the appended text. This task also allows you to submit an activities report for a previous year for which you have not yet submitted a report. This link is not displayed if your Fellowship Status is awardee or declined.

Figure 90: View or Amend Submitted Activities Reports Year

To view or amend a previously submitted activities report or add an activities report for a previous year:

Click the View or Amend Submitted Activities Reports link.

A list of years in which activities reports are required due to your Fellowship Status during that year are displayed. Any previously submitted activities reports are displayed with a link to either view or amend the report. Any activities reports that have not yet been submitted are displayed with a link to add the report.

Figure 91: View or Amend Submitted Activities Reports Screen

If you wish to view a submitted activities report:

Click the View link for the appropriate fellowship year.

If you wish to amend a submitted activities report:

Click the Amend link for the appropriate fellowship year.
A free text area is displayed for additional information to be entered.

Figure 92: View/Amend Submitted Activities Reports

Enter additional information and click the **Submit** button.

Any additional information entered and submitted will be displayed on the activities report screen under the Additional Information heading. It will also be displayed on the Amend activities report screen under the Existing Additional Information heading. All additional information will be appended to the previously added information along with a date and time stamp.

**Using Fellow Abroad Functions**

**Using Fellow Abroad Functions**

A Fellow Abroad is classified as a fellow who associated with a foreign organization for a given academic year. You can access your Fellow Abroad tasks once your tenure plan to continue your fellowship at a university that is located outside the United States has been approved. The Fellows Abroad Task List includes the following tasks: Prepare Fellows Abroad Information, Check Status of Fellows Abroad Information, View Fellows Abroad Information, and View/Submit Fellows Abroad Travel Certificate.
It is important to note that Fellows Abroad do not have Coordinating Officials at their organizations so there are additional tasks fellows abroad must perform in order to manage their fellowship. These include submitting a starting certificate, submitting a termination certificate, and submitting a payment enrollment form. The instructions for how and when to complete each form/document are listed in the sections below.

Preparing Fellows Abroad Information

The Preparing Fellows Abroad Information link provides you the ability to submit the required Starting Certificate, Payment Enrollment Form and Termination Certificate. To access the Starting Certificate, Payment Enrollment Form and Termination Certificate, do the following:

1. Click on the Prepare Fellows Abroad Information link.

The Prepare Fellows Abroad Information screen will appear and display the following screen:
Figure 95: Prepare Fellows Abroad Information Main

**Submitting a Starting Certificate**

A starting certificate must be submitted at the beginning of each fellowship year when you are a fellow abroad. Your starting certificate information must be verified and approved by your universities bursars office so that financial disbursements can provided to you. If you provide a valid email address to contact the bursars office, an email will automatically be sent to this address with your starting certificate details asking for a response from the bursars office. If an email address is not provided, you will be responsible for contacting the bursars office, and having them contact the National Science Foundation to verify your enrollment and start date. Once your Starting Certificate is submitted, your Fellows Abroad Address will be displayed in the Fellow Data section on the Fellow homepage. NSF uses both the abroad and domestic email addresses listed in your Fellow Data section to contact you while you are abroad.

The Starting Certificate includes the following information fields:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Starting Semester</td>
<td>You can choose from a Fall or Summer Start, which indicates the semester you are planning on starting your semester abroad. Starting Semester is a required field.</td>
</tr>
<tr>
<td>Start Date</td>
<td>The Start Date is the date that you will start the academic year at the Abroad College/University. This date will need to be confirmed by the Bursars Office at your Abroad University through an “Enrollment Verification”. You can enter the date manually (MM/DD/YYYY) or use the calendar to find your start date. The Start Date is a required field.</td>
</tr>
<tr>
<td>Anticipated Tenure End Date</td>
<td>The Anticipated Tenure End Date is the date that you will complete coursework for the current academic year abroad. You can enter the date manually (MM/DD/YYYY) or use the calendar to find your anticipated tenure end date. The Anticipated Tenure End Date is a required field.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Institutional Address of Fellow</td>
<td>The Institutional Address of Fellow is your address abroad. The Institutional Address of Fellow is a required field.</td>
</tr>
<tr>
<td>Institutional City</td>
<td>The Institutional City is the city where your Institution is located. The Institutional City is a required field.</td>
</tr>
<tr>
<td>Institutional Country</td>
<td>The Institutional Country is the country where your Institution is located. The Institutional Country is a required field.</td>
</tr>
<tr>
<td>Institutional Postal Code</td>
<td>The Institutional Postal Code is the postal code that your Institution uses. The Institutional Postal Code is a required field.</td>
</tr>
<tr>
<td>E-Mail Address</td>
<td>The E-Mail Address is the E-Mail Address that you will be using while your abroad. The E-Mail Address is a required field.</td>
</tr>
<tr>
<td>Home Phone Number Abroad</td>
<td>The Home Phone Number Abroad is the phone number that you will be using while your abroad. The Home Phone Number Abroad is a required field.</td>
</tr>
<tr>
<td>Work Phone Number Abroad</td>
<td>The Work Phone Number is the phone number of your work place when your abroad. The Work Phone Number is not a required field.</td>
</tr>
<tr>
<td>Fax Number Abroad</td>
<td>The Fax Number Abroad is the fax number that you use or have access to while your abroad. The Fax Number Abroad is not a required field.</td>
</tr>
<tr>
<td>Bursars Office Contact: First Name</td>
<td>The Bursars Office Contact First Name is the First Name of the Bursars Office Contact. The Bursars Office Contact First Name is a required field.</td>
</tr>
<tr>
<td>Bursars Office Contact: Last Name</td>
<td>The Bursars Office Contact Last Name is the Last Name of the Bursars Office Contact. The Bursars Office Contact Last Name is a required field.</td>
</tr>
<tr>
<td>Bursars Office Title</td>
<td>The Title is the title of the Bursars Office Contact. The Title is a required field.</td>
</tr>
<tr>
<td>Bursars Office Email Address</td>
<td>The Bursars Office Email Address is the email address where the bursars office contact can be reached. The Bursars Office Email Address is not a required field, but providing an email address can reduce the amount of time it takes in order to receive your first disbursement of funds.</td>
</tr>
<tr>
<td>Bursars Office Address</td>
<td>The Bursars Office Address is the address where the bursars office contact can be reached. The Bursars Office Address is a required field.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Bursars Office City</td>
<td>The Bursars Office City is the city where the Bursars Office is located. The Bursars Office City is a required field.</td>
</tr>
<tr>
<td>Bursars Office Country</td>
<td>The Bursars Office Country is the city where the Bursars Office is located. The Bursars Office Country is a required field.</td>
</tr>
<tr>
<td>Bursars Office Postal Code</td>
<td>The Bursars Office Postal Code is where the Bursars Office is located. The Bursars Office Postal Code is a required field.</td>
</tr>
<tr>
<td>Bursars Office Phone Number</td>
<td>The Bursars Office Phone Number is the phone number where the Bursars Office can be reached. The Bursars Office Phone Number is a required field.</td>
</tr>
<tr>
<td>Scientific Advisor First Name</td>
<td>The Scientific Advisor First Name is the First Name of the Scientific Advisor. The Scientific Advisor First Name is a required field.</td>
</tr>
<tr>
<td>Scientific Advisor Last Name</td>
<td>The Scientific Advisor Last Name is the Last Name of the Scientific Advisor. The Scientific Advisor Last Name is a required field.</td>
</tr>
<tr>
<td>Scientific Advisor Title</td>
<td>The Title is the title of the Scientific Advisor. The Title is a required field.</td>
</tr>
<tr>
<td>Scientific Advisor Email Address</td>
<td>The Scientific Advisor Email Address is the email address where the Scientific Advisor can be reached. The Scientific Advisor Email Address is a required field.</td>
</tr>
<tr>
<td>Scientific Advisor Telephone Number</td>
<td>The Scientific Advisor Phone Number is the phone number where the Scientific Advisor can be reached. The Scientific Advisor Phone Number is a required field.</td>
</tr>
<tr>
<td>Scientific Advisor Department</td>
<td>The Scientific Advisor Department is the department that the Scientific Advisor is associated to. The Scientific Advisor Department is a required field.</td>
</tr>
</tbody>
</table>

To Submit a Starting Certificate:

Select the **View/Submit Starting Certificate** link from your Prepare Fellows Abroad Information Task List.

The Submit Starting Certificate screen is displayed.
Figure 96: Starting Certificate Link

Enter Start Date Information.

Figure 97: Start Date

Enter End Date Information.

Figure 98: End Date Information

Enter Fellow Abroad Contact Information.

Figure 99: Fellow Abroad Contact Information

Enter Bursars Office Information.
Figure 100: Bursars Office Information

Enter Scientific Advisors Information and Press Save & Submit.

Figure 101: Scientific Advisor Information

Once you have submitted your starting certificate, a confirmation screen is displayed. You may select the Fellows Home Page link to return to your home page and task list. Your Starting Certificate information will then be forwarded to your bursars office for approval if an email address was provided. It is encouraged for you to provide an email address as quick response from your Bursars Office could reduce the amount of time it takes in order to receive your first disbursement.

To edit a submitted Starting Certificate for the current year, click on the View/Submit Starting Certificate link available in your Prepare Fellows Abroad Information task list again. Your last submitted Starting Certificate for the current year will be displayed. You may then click the edit button to change the information on the form and resubmit the Starting Certificate. Once your bursars office has verified your Starting Certificate information, you will be unable to change the bursars office contact information.

**Submitting a Payment Enrollment Form**

A payment enrollment form must be submitted once you become a fellow abroad in order for NSF to issue your stipend and other costs directly to you. Once you have accepted your award and indicated a foreign organization or declared your tenure plans for the next year

and indicated a foreign organization, you will be able to submit a Payment Enrollment form through the Prepare Fellows Abroad Information link. You are responsible for verifying and submitting your own
Payment Enrollment form, which is done using an E-Signature. Once you submit the payment enrollment form, it will be forwarded to the NSF for processing. After the form has been processed, you will receive a confirmation email from NSF. You are only required to submit a payment enrollment certificate for the first year that you are abroad. For each successive year, it is important for you to verify that the payment enrollment form details are correct.

To Submit a Payment Enrollment Form:

Select the **View/Submit Payment Enrollment** link from your Prepare Fellows Abroad Information Task List.

![Figure 102: View/Submit Payment Enrollment Form](image)

The payment enrollment form is displayed. The required fields on the form are indicated with an asterisk.

Enter your Social Security Number Information (SSN) in the Social Security Number section. It is important to note that as you enter in your SSN into the fields provided, that your SSN will appear in the form of asterisks (*) for security purposes. You are only able to enter your SSN into the Payment Enrollment form once. Once it’s entered and saved, you will be unable to edit your SSN. If you return to the Payment Enrollment Form screen after you have saved your SSN information, your SSN will appear in the form of asterisks (*) for security purposes.

![Figure 103: Social Security Number Information](image)

Enter your banking organization information in the Financial Institution section.
Figure 104: Financial Institution Information

Enter your specific account information in the Account Information section, including the name on the account, the type of account (i.e. checking, savings, etc.), the account number, and the routing number.

Figure 105: Bank Account Information Section of the Payment Enrollment Form

Enter your ACH Coordinator Information, if available. If you do not know this information, enter your name or the name of the person that assisted you in setting up this account.

Figure 106: ACH Coordinator Information

Click the Save & Submit button.

A verification screen is displayed for you to verify that all information was correctly entered. You may go back and edit incorrect information, or continue submitting the form.
Read the Privacy Act all Certifications carefully and check the boxes next to each certification. By checking each certification, you are certifying that statements made therein are true and complete to the best of your knowledge; and agreeing to accept the terms of the Privacy Act.

Press the Submit button to submit your Payment Enrollment Form.

Once you have agreed that the information is correct, a confirmation screen is displayed indicating that you have successfully submitted a payment enrollment form. You may select the Fellow Home Page link to return to your home page and task list. Your payment enrollment information will then be forwarded to NSF for processing. After the form has been processed, you will receive a confirmation email from NSF. If you need to update your payment enrollment information, you may use the View/Submit Payment Enrollment Form link that is available in your Prepare Fellows Abroad Information task list. Once you have submitted your payment enrollment certificate, the link allows you to view the information you last submitted on the payment enrollment form. To make changes to this information, click the Edit button.
Submitting an Termination Certificate

The Termination Certificate must be submitted at the completion of each fellowship year when you are a fellow abroad. A Starting Certificate for the current abroad year must be submitted before you can submit a Termination Certificate for that year. You are responsible for verifying and submitting your own termination certificate, which is done using an E-Signature. A Termination Certificate should be submitted no more than 30 days prior to completing coursework for the academic year abroad. It is important to note that once your Termination Certificate has been submitted, your mailing contact information in your Profile will be updated with the mailing address and email address entered on the Termination Certificate. NSF uses information stored in your Profile for contacting you during your fellowship.

To Submit a Termination Certificate:

Select the View/Submit Termination Certificate link from your Prepare Fellows Abroad Information Task List.

The Submit Termination Certificate screen is displayed.

Figure 108: Termination Certificate Screen

Enter your New Fellow Contact Information and enter your completed tenure activity date by using the calendar icons or manually entering in the date. A calendar is displayed in a separate window and allows you to select a date.
Click the Continue button.

The Certify Termination Certificate Screen displays a new screen with the termination certificate information you entered.
Press the **Sign & Submit** button to submit your Termination Certificate.

By pressing the Sign and Submit button, you are certifying that the information you provided in the Termination Certificate is correct and that you completed your tenure at that stated institution on the date you indicated. You are also certifying that the statements you made are true and complete to the best of your knowledge. You are also agreeing and willingly accept the obligation to comply with the NSF award terms and conditions.

**Check Status of Fellows Abroad Information**

The Check Status of Fellows Abroad Information link allows you to check the status of your submitted Starting Certificate, Enrollment Verification, Payment Enrollment Form, Termination Certificate and Fellowship Travel Certificate (Not required). The Enrollment Verification is the only status element that you are not responsible for submitting. The Enrollment Verification status is updated when your institutions bursars office verifies your enrollment information by responding to the NSF. It is important to provide a bursars office email address (if possible) so that a timely response is obtained.

To Check the Status of your Fellows Abroad Information:

1. Select the **Check Status of Fellows Abroad Information** link from your Fellows Abroad Task List.

The Check Status of Fellows Abroad Information screen is displayed.

![Figure 111: Check Status of Fellows Abroad Information Screen](image)

The overall status of your Fellows Abroad Package status will be incomplete until such time that all of the required status elements are submitted. The required elements include the Starting Certificate, Enrollment Verification, Payment Enrollment and Termination Certificate Information. The
Status/Description for the various elements will be blank until such time
that your information is submitted in the system. When your certificates/forms are submitted, the
Status/Description will change to “Submitted On” and the date in which the information was submitted
in the system. Additionally, the check boxes located between the status elements and descriptions will
no longer be empty and will appear with a check in the box also indicating that your information was
submitted in the system.

**View Fellows Abroad Information**

The View Fellows Abroad Information link allows you to view current and previous years Fellows
Abroad information. The Fellows Abroad Information includes your current and previous Starting
Certificates, Payment Enrollment Information and Termination Certificates. Once you have completed
your tenure abroad, the View Fellows Abroad Information link will always be available in your Fellows
Abroad task list.

To view your current and previous years Fellows Abroad Information:

Select the **View Fellows Abroad Information** link from your Fellows Abroad Task List.

The View Fellows Abroad Information screen is displayed.

![View Fellows Abroad Information Screen](image)

**Figure 112: View Fellows Abroad Information Screen**

Choose the Fellowship Year where you were abroad and press the **View**
link. The Fellows Abroad Information screen is displayed.
When the Fellows Abroad Information Screen is displayed, you are able to toggle between the Starting Certificate, Payment Enrollment and Termination Certificate by clicking on the tab that you wish to see.

It is important to note that you are not able to edit any of the Fellows Abroad Information when you view this information through the View Fellows Abroad Information Link. To edit the current year Fellows Abroad information, please review the Prepare Fellows Abroad Information section above.

**View/Submit Fellows Abroad Travel Certificate**

The View/Submit Fellows Abroad Travel Certificate link enables you to submit a request for a one-time travel stipend to assist you while you travel to and from your abroad institution. The travel certificate is only valid if you are traveling Internationally.
To View/Submit your Fellows Abroad Travel Certificate:

Select the **View/Submit Fellows Abroad Travel Certificate** link from your Fellows Abroad Task List.

The View/Submit Fellows Abroad Travel Certificate screen is displayed.

![View/Submit Fellows Abroad Travel Certificate Screen](image.png)

**Figure 115: View/Submit Fellows Abroad Travel Certificate Screen**

Choose **One of the three Statement choices** (required):

I would like to receive an advance of travel funds for the trips described below. I understand that if a travel advance is granted to me, it would be under the following conditions:

I have already received an advance of travel funds, and am submitting, for your records, a description of my travel.

I have completed my travel and am requesting a travel reimbursement.

Enter your Grant Number (Optional).

Enter your Departure and Arrival Information (Required).

Describe your travel plans. Specify the foreign site(s) and the dates you plan to spend in research or study there: (Must be less than 4000 characters.)
Figure 116: Travel Plans Sub-Screen

Press the Sign & Submit button to submit your Fellows Abroad Travel Certificate.

A confirmation screen is displayed indicating that you have successfully submitted your Fellows Abroad Travel Certificate. You may select the Fellow Home Page link to return to your home page and task list. Your Fellows Abroad Travel Certificate will then be forwarded to NSF for processing. After the Travel Certificate has been processed, you will receive a confirmation email from NSF.

Managing Your User Profile

Managing Your User Profile

Your user profile includes your name, Open Researcher and Contributor ID (ORCID), mailing contact information, and permanent contact information. Your name and mailing contact information are displayed in the Fellow Data area on the right side of your home page. If entered, the ORCID will be displayed under the name field, with a hyperlink to the ORCID registry to allow you to validate your ORCID profile. You may view or update your GRFP profile at any time using the Update My Profile link found in the Fellow’s Optional Task List area. Changes to your profile information do not require approval by your Coordinating Official or NSF. It is important to note that if you are Abroad, you must make changes to personal profile information by submitting a Starting Certificate. When updating your profile information, you may make changes to your name, ORCID, mailing contact information, or permanent contact information. The required fields in your profile are marked with an asterisk.

TIP: All correspondence related to your fellowship will be sent to your mailing contact information. Your mailing e-mail address will also be the e-mail address that all system-generated e-mails and reminders will be sent to. Please be sure that you keep this information up-to-date.

NOTE: While abroad, contact information should be updated by submitting or editing a Starting Certificate.

Fellow Data

After logging in, your name and mailing contact information are displayed in the Fellow Data area on the right side of your home page. If entered, the ORCID will be displayed under the name field.
Figure 1: Fellow Data on Welcome Fellows Screen

NOTE: The Open Researcher and Contributor ID (ORCID) will display as a 16-digit number in groups of four digits separated by a hyphen, with a hyperlink to the ORCID registry web site. This will allow the Fellow to validate his/her profile on the registry.

Update Fellow Profile

To Update Your Profile:

Select the Update My Profile link from the Fellows Optional Task List.
Your current profile information is displayed with the ability to edit each field.

Enter the changes to your profile information.

Click the **Save** button.

Once you have submitted the changes to your profile, a confirmation screen is displayed. You may select the Fellows Home Page link to return to your homepage and task list. Any changes to your mailing contact information will be reflected in the profile area of your fellow data.

When you are a Fellow Abroad, your abroad address will also be displayed in the profile area of your fellow data once you have submitted a Starting Certificate. The Fellows Abroad address will be removed from your fellow data section once your Termination Certificate is completed for the Fellows Abroad period. The **Update My Profile** link should always be used to update your domestic address. NSF uses both the abroad and domestic e-mail addresses listed in your Fellow Data section to contact you while you are abroad.

**NOTE:** The [Open Researcher and Contributor ID (ORCID), a 16-digit number](https://orcid.org) can be entered and updated by the Fellow.

**Creating or Resetting Secret Questions and Answers**

In the event you are unable to remember your login Password or User Name, you are able to reset (password) or retrieve (username) these items. To reset or retrieve your Password or Username, you will have to correctly answer either one or two secret questions.
To set or reset your Secret Questions and Answers:
Select the Reset Secret Questions link from your Optional Task List

**Figure 119: Reset Secret Questions Link**

The Reset Secret Questions screen appears:

**Figure 120: Reset Secret Questions Screen**

Select one question for retrieving your Username and provide the answer.

Select two different questions for resetting your Password and provide the answers.

Click the **Save** button.

You will need to recall the questions answered and to provide the correct answers to in the event you later choose to reset your password or retrieve your username through the Forgot Password orForgot Username features (see the Resetting Your Password and Retrieving your Username sections)