

ERA Forum Webinar Series: Q&As

This document contains questions and answers about Account Management Modernization, Proposal Submission Modernization (PSM), and Awards Management topics discussed during the ERA Forum webinar. The webinar was held on April 12th, 2018. For further questions about Account Management Modernization and PSM, please send an email to nsferaforum@nsf.gov. For questions regarding NSF proposal and award policies and procedures, please send an email to policy@nsf.gov.

1. Related to Account Management Modernization:

a. Are SPOs included in the account management changes?

Yes, anyone with a current NSF ID is included in the account management changes. This includes SPOs, AORs, ACM\$, etc.

b: The new user management interface does not allow the Admin to change the primary email address. What is the process for account recovery if the user no longer has access to the email account in the profile?

Once system updates are complete, you will be able to update your own email address. For the time being, the user needing account recovery must contact the NSF Help Desk. Administrators cannot currently change other users' email addresses.

c: Is there a way for non-Administrator users to view other users at the institution (i.e., to look up NSF IDs for designation as co-PIs on the cover sheet)?

Currently, there is no functionality for this. However, there is the ability to search by NSF ID in the Research.gov proposal preparation site when adding co-PIs.

d: Is it possible for a research administrator to look up the NSF ID for a user without sending them an email?

NSF IDs are not generally shared. Research administrators should contact the individual. If there is a business need for a lookup feature, this is something for which NSF would appreciate feedback.

e: How are we supposed to submit a proposal with a rapidly approaching deadline when our accounts have not been reconciled and we are unable to approve a new user (PI on the proposal)?

To add a new PI, please contact the NSF Help Desk and Indicate that this issue is a high priority.

f: Will the primary email address be the address recognized by the system?

The primary email is not the address to use; instead, use your university or organization email. However, conducting a search by email address will search all the user's email addresses on file.

g: Is there a way for Administrators to look up user IDs for their faculty?

To help protect personal information, faculty user IDs are not made available on the View My User page. NSF recommends obtaining the NSF ID directly from that individual. You can also search by email in PSM if you don't have a user's NSF ID.

h: Will new users be able to request the Other Authorized User (OAU) role at any point in the future?

Yes, NSF is planning to introduce this functionality in a future release.

i: Can someone with a PI role log in as an OAU in Research.gov?

Yes. While working on a proposal in Research.gov, to add an OAU go to the Manage Personnel section and click "Add." Any user that has an NSF ID and at least one role can be assigned as an OAU. After access is granted, the proposal will show up in the OAU's in progress proposals.

j: Is there a way for an OAU to have an ongoing role, rather than a per-proposal role?

The OAU role allows the user to assist a PI with preparation of a specific proposal, and is currently assigned on a per-proposal basis.

k: Is an OAU the same as an AOR in the current role definitions?

No, nothing has changed regarding the functions an AOR or OAU can perform. AORs can sign proposals for an organization. OAUs can only help prepare proposals if granted access by the PI. The OAU access is also on a proposal by proposal basis.

l: Can users request OAU access, or does it have to be assigned by an Administrator?

Currently, Administrators must assign the role, but the ability to request the role will be added in a future release.

m: I have logged in with my user ID. My role is listed as View Only. Do I have to ask my administrator to give me an OAU role?

Yes, View Only provides access to specific reporting functions in FastLane, such as Run Organizational Reports. OAUs must be assigned by an Administrator and the PI must also grant access to the specific proposal for you to work on it.

n: Can an AOR add an OAU, or can that only be done by a PI?

Only a PI can grant access for an OAU to work on their proposal.

o: With the OAU role, would each PI have to add you to the proposal? Or can an OAU be assigned to a PI's ID and have access without any additional action by the PI?

OAs must have access granted on a proposal by proposal basis. There are no current plans to change how the OAU role works.

p: I am not an Institutional Administrator. I am the Sponsored Programs Coordinator who works with PIs to complete their applications. What is the updated process for them to add me to their proposal so that I can have access to their proposals from my own log in?

You can be added as an OAU, which is available in the Manage Personnel section. In the new system you, must have an NSF ID. You will need to register for an account, and then will have the OAU role granted on the screen with assigned roles. Although FastLane does currently use PINS, Research.gov will not, so you must be specifically added to the system. If you were an existing OAU, this will be migrated over to the new system. New OAUs must register.

q: How do I remove my email from my previous job? I have my current email as my primary email, so I can get my emails from NSF. But I would like to remove my previous institution's email/role from my profile.

You will need to contact the administrator from your previous institution to remove your role. Administrators are supposed to remove users once they leave that institution. NSF plans to add a feature in a future release that allows users to remove themselves from an organization.

r: I am concerned about the ability to add PIs/Co-PIs to proposals if we do not have access to their NSF IDs. I understand we can search by primary email, but is NSF suggesting we use a non-work or personal email that the SPO may not know?

You will be able to add co-PIs by their registered work email address.

s: We have more than one AOR and each one uses the same central email as their email address. Is this a problem, and is there a way around it?

NSF does not support aliases as email addresses on account profiles. Therefore, each email address can only be associated with one NSF ID. Aliases may only be used on the Organization profile in FastLane.

2. Related to Proposal Submission Modernization (PSM):

a: Should we continue to use FastLane for Collaborative Proposals?

Separately submitted Collaborative Proposals and sub-awards must be done in FastLane for now. This functionality is planned for the new system in the future.

b: Will FastLane be eliminated? At what point do we need to switch over entirely to Research.gov?

FastLane will be sunset in the future, but the date has not yet been determined.

c: Are all opportunities still available in FastLane for right now?

Yes, all opportunities will still be available in FastLane for the time being.

d: We are a University Affiliated Research Center (UARC). Our proposals get submitted through our university affiliation; however, as a DOD contractor, our contracts are submitted through our organization directly. How can our AORs and PIs use both?

As a federal contractor, the business can be registered in Account Management, and users who will be proposing business to NSF can request the appropriate roles. The business must have a SAM registration in order to do this.

e: Are OAU's able to work in the preview environment? Will they be able to initiate a proposal in Research.gov?

The user needs to be added to the proposal as an OAU to obtain proposal access. A new user would need to register to get an NSF ID. OAUs cannot initiate a proposal currently, but NSF will consider this in the future.

f: Will OAUs have additional functionality in Research.gov, like ability to do proposal file updates (PFUs), revised budgets, or supplement requests?

OAUs will have additional functionalities in the future. OAUs currently cannot initiate PFUs/BRs, but can work on them.

g: As a research administrator, will I need to have the PI that I support add me as an OAU every time he or she submits a proposal?

Yes.

h: As a Research Administrator, do I need a PI ID to start a new proposal?

A Research Administrator would need to have the PI role to create a proposal. Research Administrators can assign themselves the PI role.

i: If a proposal is started in Fastlane ahead of the release, will it be converted/migrated to Research.gov automatically?

A proposal that is started in FastLane must be completed and submitted in FastLane.

j: Some solicitations require letters that have letterheads with logos and addresses in varying fonts and font sizes. Will the new system be doing compliance checks on these as well? If so, will the system allow for variations?

Additional solicitation-specific requirements do not currently undergo a full compliance review in Research.gov. Proposers should be careful to follow the instructions when a solicitation requires Other Supplementary Documents.

k: Is the primary email address that a user enters in their profile (the one suggested to be a personal account to allow continuous access) the email that must be entered to add an individual as a co-PI (for example, in the boxes on the cover page)?

The organizational email address (e.g. bill@virginia.edu) should be used in the manage personnel section, which will be populated in the appropriate areas of the proposal.

l: Will the new system encompass progress reports as well? Specifically, will the AOR be able to submit reports on behalf of a PI?

The reporting features in Research.gov are not changing at this time, but NSF can investigate AOR submission of reports as a requirement for the future.

m: I've noticed the system adds headers to all sections. Does this mean that PIs should not add them again?

Correct. The system automatically adds headers where required by the PAPPG. The system also paginates the proposal, so margins must be left blank for this feature to pass the compliance check.

n: Will solicitations indicate which system the submission can be or needs to be submitted through?

Solicitations with preparation instructions that are incompatible with current Research.gov capability will not be available for submission in Research.gov. At this time, Research.gov is an alternative to FastLane for full, research non-collaborative proposals.

o: Will AORs or SPOs be able to start a proposal for a PI? Or will PIs still have to start their own proposals?

Currently, the PI must create the proposal. NSF will consider additional functionality in the future.

p: Can you add an individual to a proposal using a secondary email also? This would be in addition to their NSF ID or primary email.

Yes. In PSM, you can add the individual to a proposal using any email address they have on file with NSF.

q: Can a collaborator template ever be pre-populated?

This feature is on the roadmap, and we will be implementing it in the future.

r: How will collaborative (linked) proposals work between institutions?

This feature is currently under development, and NSF will demonstrate it at a future ERA Forum webinar.

s: If a proposal doesn't have a Postdoc in the Budget, previously you needed to add a document stating there is no Postdoc in application. Will the new Research.gov submission require such a document stating there is no Postdoc?

The requirement to submit a postdoctoral mentoring plan is directly tied to the budget. Currently in both FastLane and Research.gov if there is no Postdoc listed on the budget, you will not be required or prompted to add a postdoctoral mentoring plan to the proposal.

t: What is the timeline for more robust font validations?

NSF is actively working on this service. Improvements will be incrementally deployed over the next year.

u: Is it safe to assume that Research.gov will be new go-to site for submitting proposals for all federal agencies?

Research.gov is only available for proposal submission to NSF. Grants.gov continues to remain the Federal-wide resource for finding and applying for Federal assistance awards.

v: Is the person months reporting on the current and pending form going to be updated to match how PMs are entered on the project budget?

NSF will be developing enhancements to the current and pending support form. Details will be disseminated in the future.

w: Are we required to leave the text instructions on top of the COA template?

We cannot support any issues with uploading the template if the template has been modified.

x: We have a PI that is starting a proposal, but it takes him back to FastLane and tells him he has no PI status. Is this an error or is something wrong with his login?

Please contact the NSF Help Desk to open a ticket. Most likely, there is a problem with this account.

y: If a research administrator initiates a proposal on behalf of a PI, does that administrator show up as a PI for the proposal, or will they be allowed to remove themselves from that proposal and/or list themselves as a proposal editor?

Only PIs can initiate proposals at this time. If a PI starts a proposal and would like to switch to another PI, they must add a co-PI and then remove themselves from the proposal. The system will then prompt to select the co-PI as the PI. When a PI is removed from a proposal, access as a PI to that proposal is removed.

z: If the PIN process is being removed, are we able to grant access to sub-institutions to enter their budget without adding them to our organization?

Collaborative proposals with sub-awards are not yet implemented, and NSF will preview that feature in the near future. At this time, OAU's can be added in the manage personnel section to any proposal to modify the budget.

3. Related to Awards Management

a: Is it possible to add the PI's name to the New NSF-Approved NCE Award Notice?

NSF is currently investigating this enhancement.

b. Will grantee-approved NCEs generate an amendment?

No. Since this is a Grantee action initiated as a notification by the Awardee, there are no plans to make this an official amendment issued by NSF or a Grants Officer. The onscreen message of successful submission and a follow-up email will be the mechanism for confirmation of the notification being accepted. Additionally, once submitted, the end date of the award should be updated in ACMS as well as other official NSF electronic systems.

c: When an award transfer is approved by NSF, can the original organization please receive a copy of the approval? In the past, the original organization received the approval, but this is no longer the case.

This will be part of NSF's awards modernization project. Yes, the original awardee will receive a copy of the approval.

4. Other Questions

a: Will System-to-System (S2S) continue to use FastLane as the submission system?

S2S submissions will continue to be available to view and update in FastLane. The proposal status will be available in Research.gov.

b: In regards to machine reading the new formatted notices, are there any plans for providing the notices via S2S in the coming years?

There are no plans to provide a separate S2S service. NSF would be interested in hearing from a variety of institutions about what would work well in terms of machine-readable awards and amendments.

c: Will there be a recording of the webinar?

Although the webinar was not recorded, the presentation materials are available on the [NSF ERA Forum website](#).