# How to Add or Remove co-PIs and Other Senior Personnel

This guide demonstrates how to add or remove co-Principal Investigators (co-PIs) and Other Senior Personnel. For information about registering for an NSF account to obtain an NSF ID and adding organizational user roles, please visit the Research.gov [About Account Management](About Account Management) page.

## *Adding a co-PI*

**1** **Click the Manage Personnel and Subaward Organizations button on the proposal main page.**

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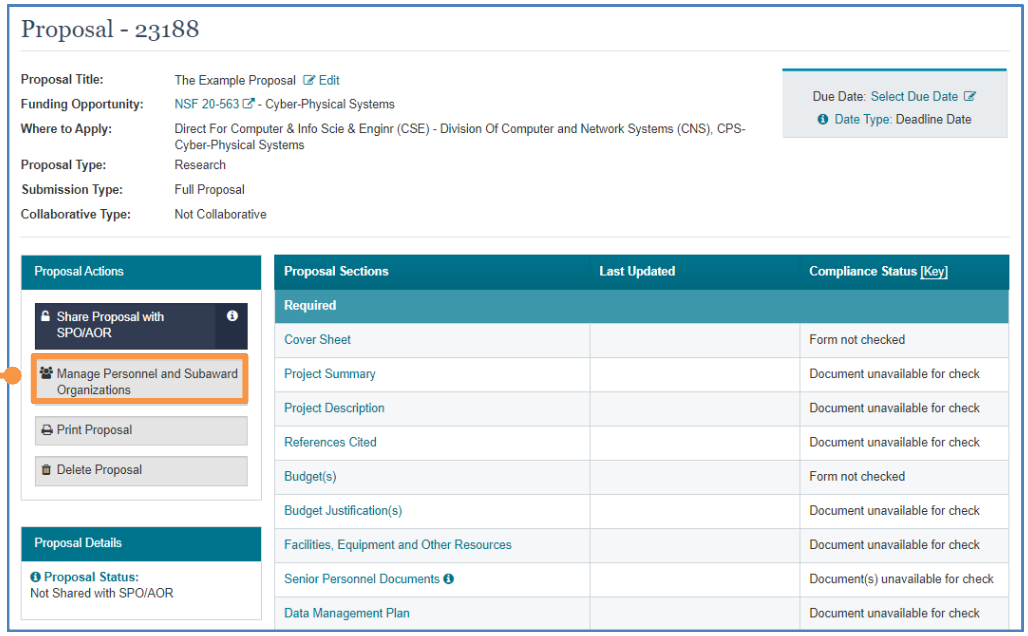
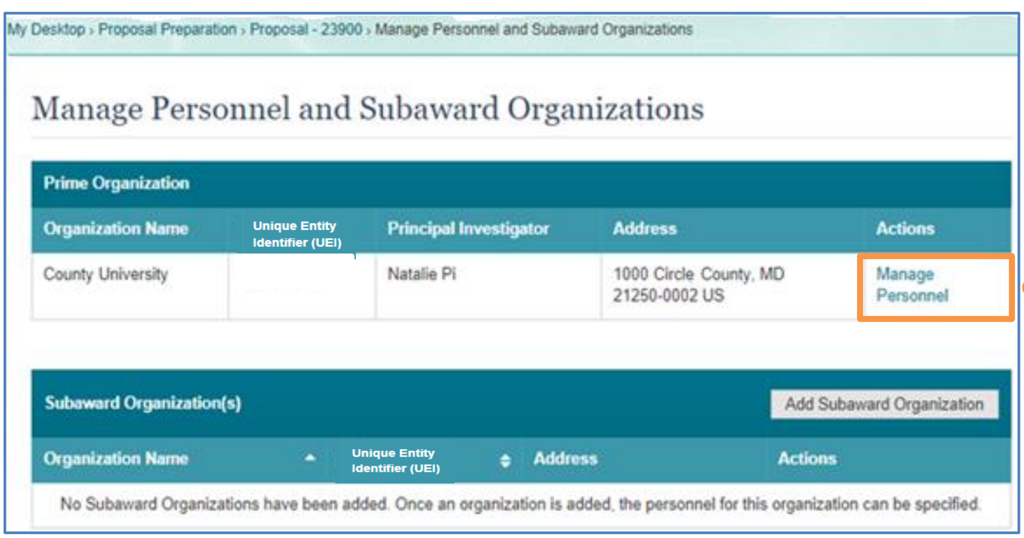
**Manage Personnel and Subaward Organizations button**



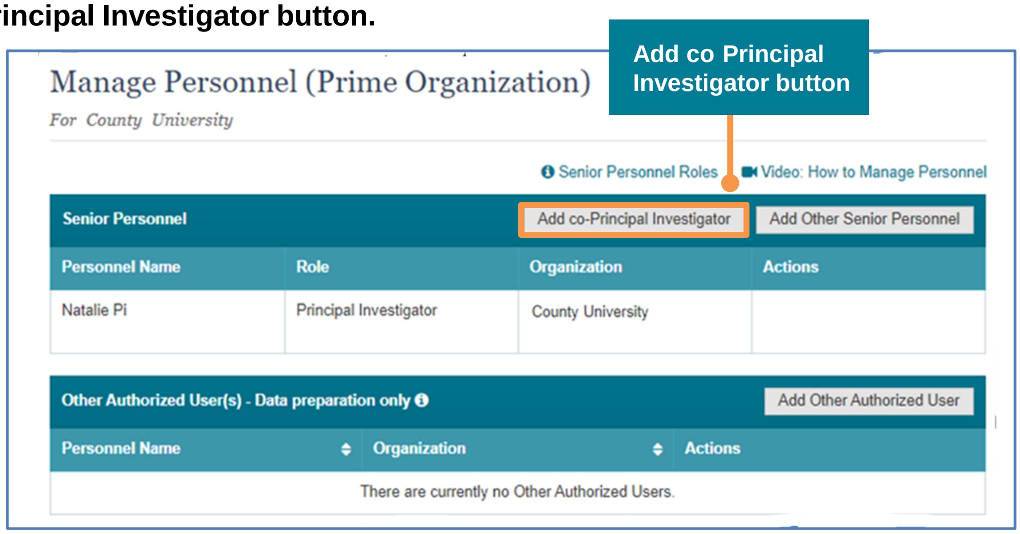

**2** **Click the Manage Personnel link on the Manage Personnel and Subaward Organizations page.**




**Manage Personnel link**

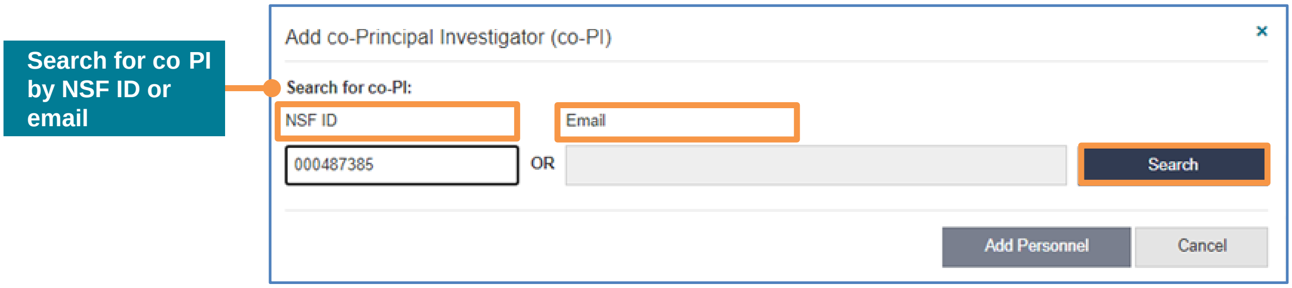
# How to Add or Remove co-PIs and Other Senior Personnel (cont'd)

## 3 Click the Add co-Principal Investigator button.

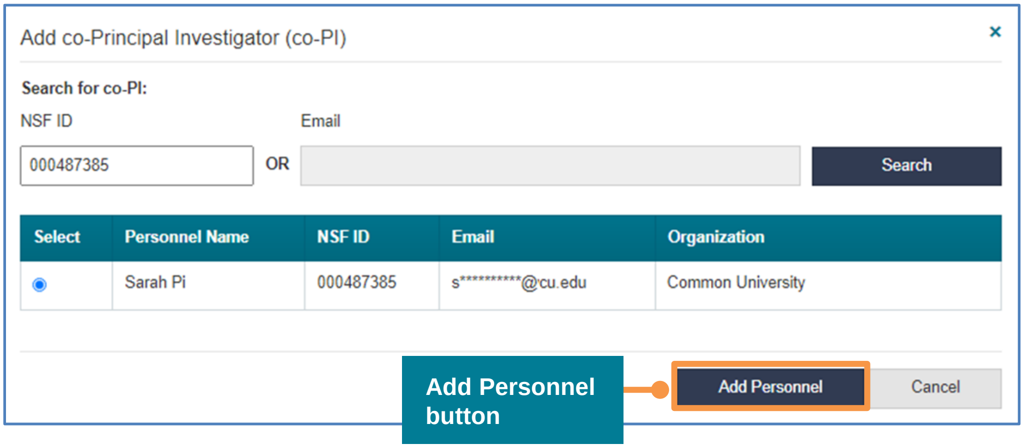



## 4 Enter the NSF ID or email address of the individual to be added as a co-PI and click the Search button.

- The individual to be added as a co-PI must have an NSF ID (NSF account) and an active PI role with an organization that has a valid and active System for Award Management (SAM) registration and a valid Unique Entity Identifier (UEI). The organization must also be registered with NSF.
- You will need either the individual's NSF ID or the email address associated to their NSF ID (NSF account) to search for the individual.
- Note that individuals from subrecipient organizations with a UEI from SAM but not registered in SAM cannot be added as co-PIs but can be added as senior personnel.
- The Search button is enabled after an NSF ID or email address is entered.



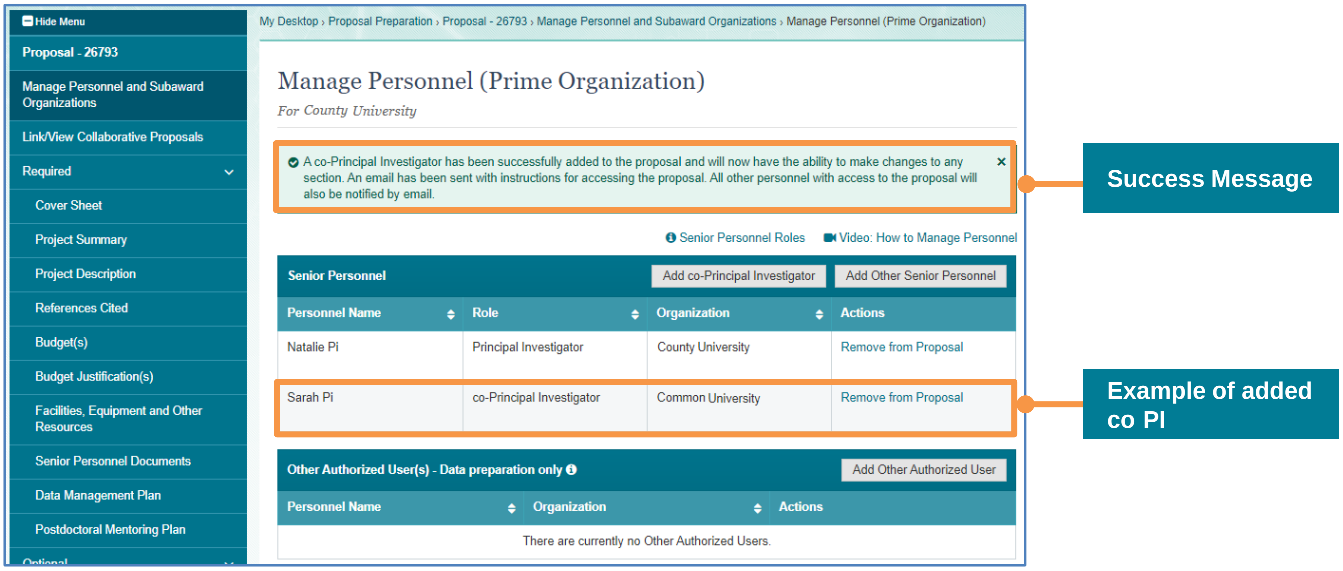

## 5 Click the Add Personnel button to add the selected individual as a co-PI.



# How to Add or Remove co-PIs and Other Senior Personnel (cont'd)

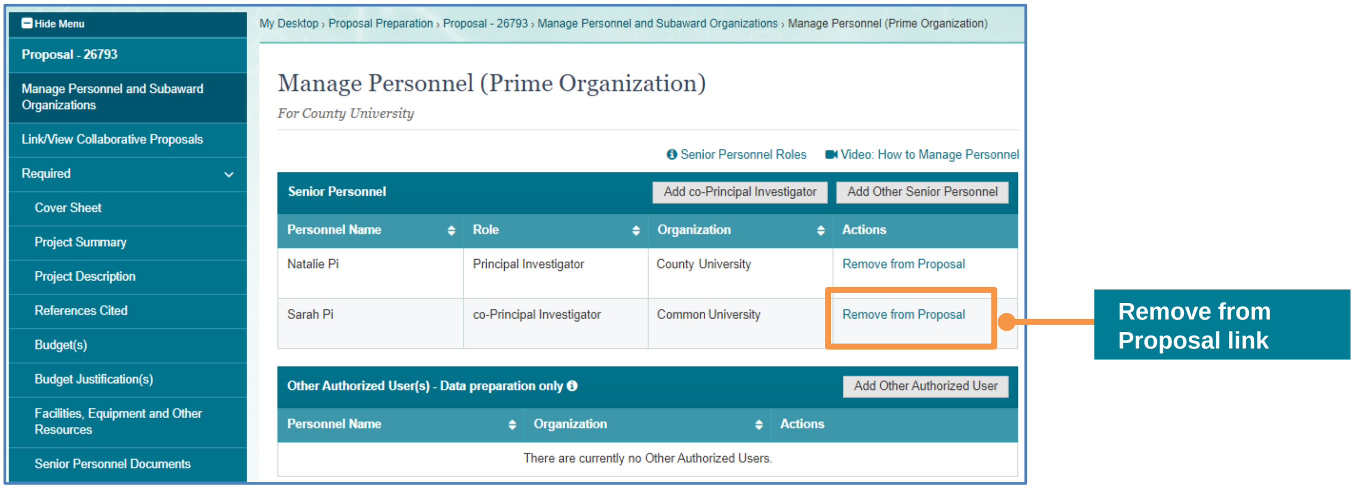
## 6 A success message confirms the co-PI was added.

- The co-PI will be notified by a system-generated email.
- Once the co-PI role has been added, allow up to 60 minutes for the system to process the request.
- All other personnel with access to the proposal will also be notified by a system-generated email.
- An individuals added as a co-PI can view, access, or edit the proposal.

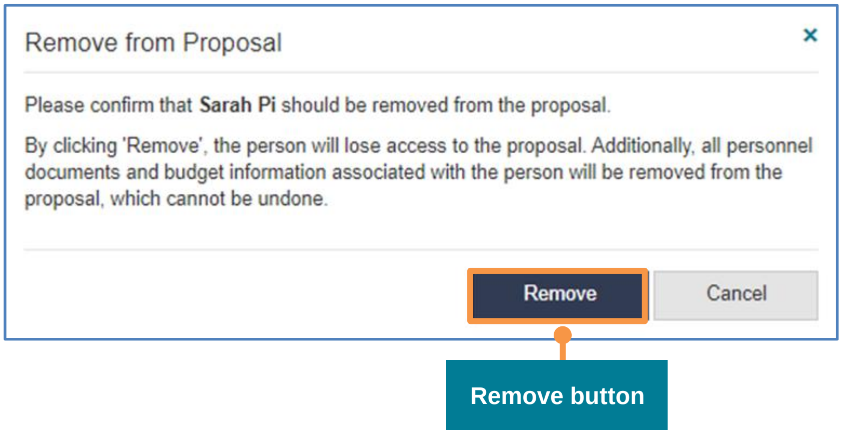



## *Removing a co-PI*

## 1 To remove a co-PI, click the Remove from Proposal link for the selected individual.

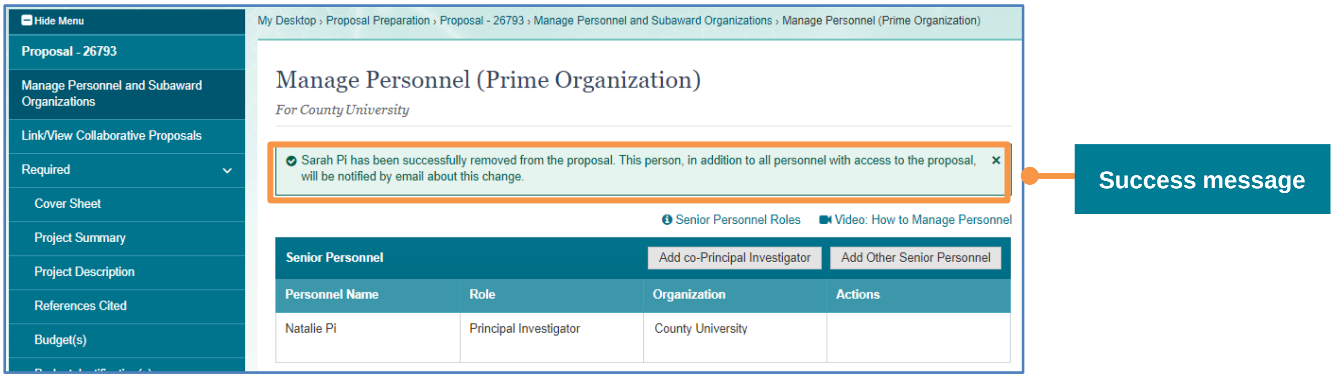


**2** **Click the Remove button to confirm removal of the selected co-PI.**




**3** **View the success message confirming the co-PI was removed.**

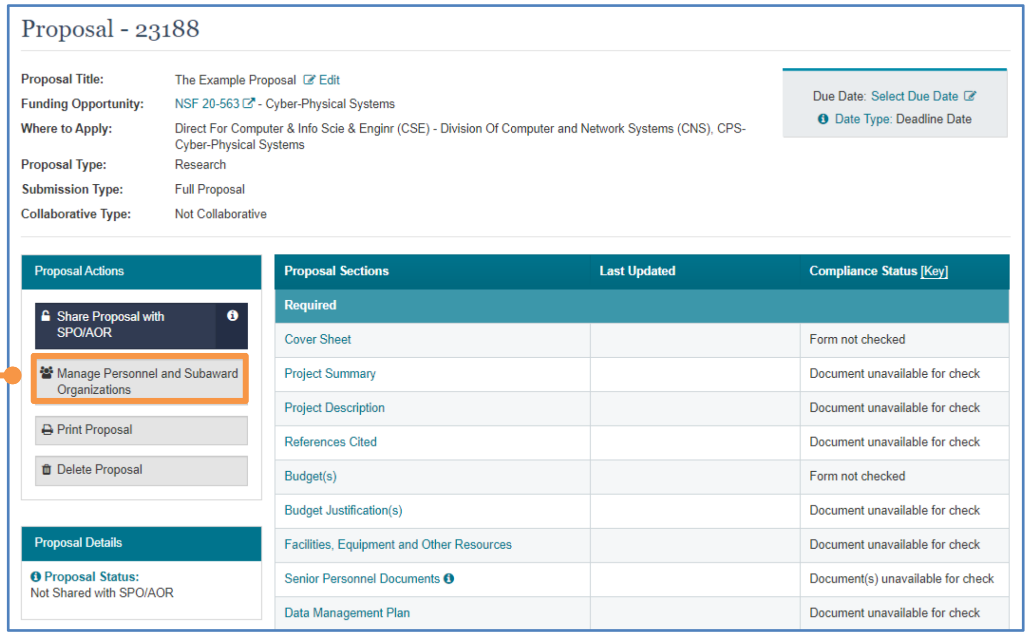
- The co-PI will be notified by a system-generated email.
- All other personnel with access to the proposal will also be notified by a system-generated email.



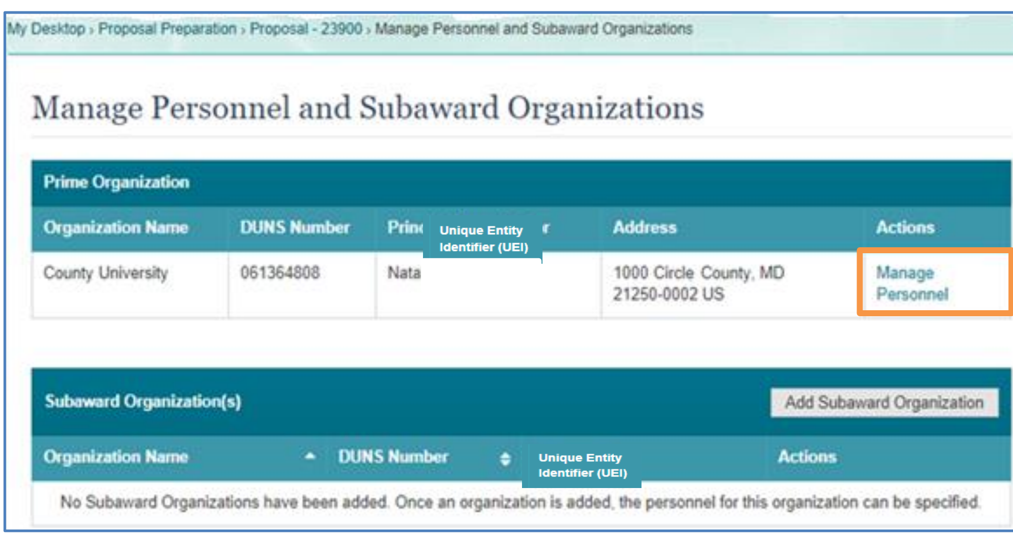
## *Adding Other Senior Personnel*

**1 Click the Manage Personnel and Subaward Organizations button on the proposal main page.**

**Manage Personnel and Subaward Organizations button**




**2 Click the Manage Personnel link on the Manage Personnel and Subaward Organizations page.**




**Manage Personnel link**

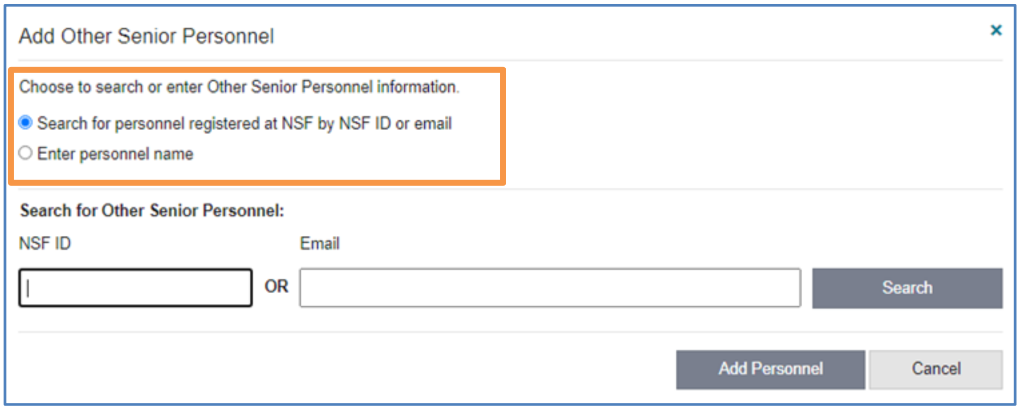
# How to Add or Remove co-PIs and Other Senior Personnel (cont'd)

**3** **Click the Add Other Senior Personnel button.**


**Add Other Senior Personnel button**

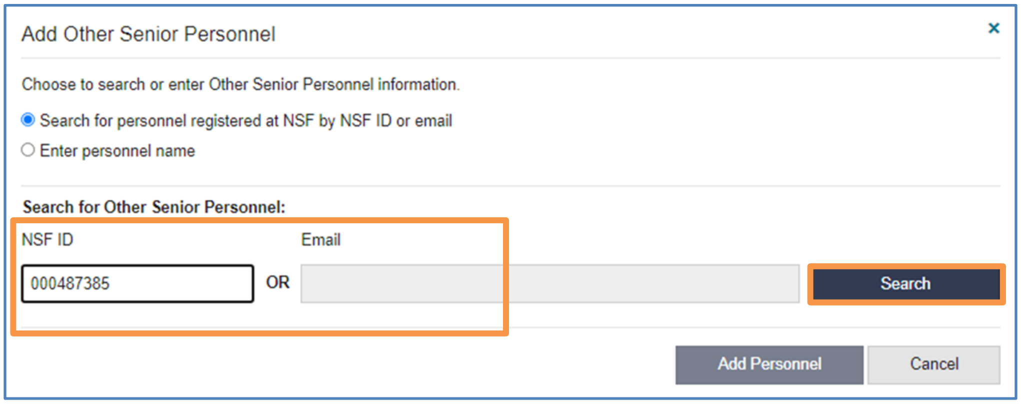
**4** **Select whether to add the individual by NSF ID or email address, or by name.**

**Radio buttons indicate how to search or enter Other Senior Personnel**



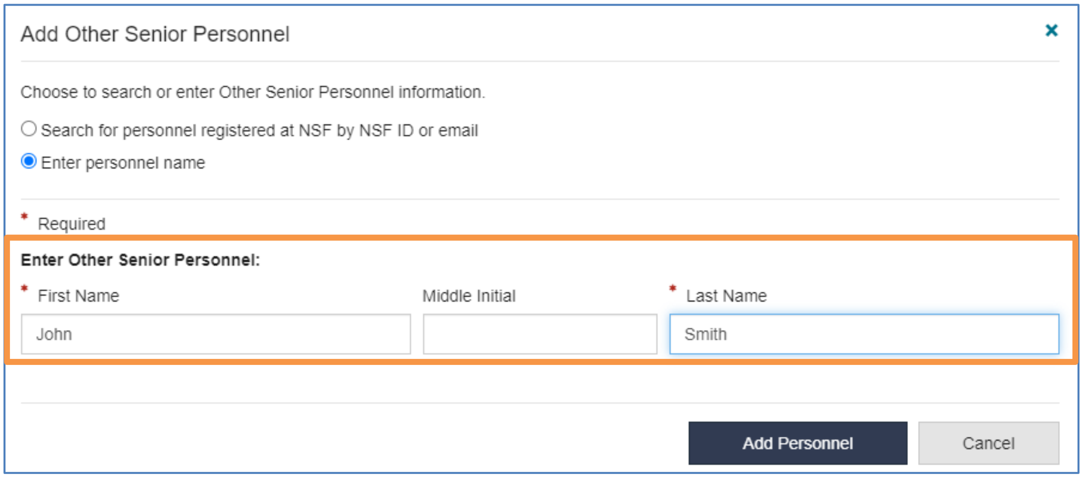

**5A** **To add the individual by NSF ID or email address, enter an NSF ID or email address and click the Search button.**

- To use this method, the person must have an NSF ID (NSF account).

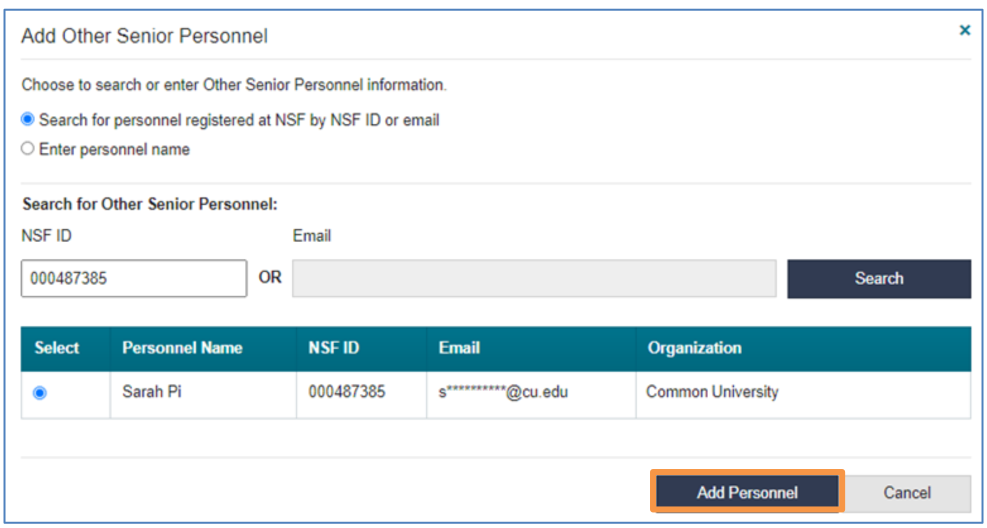


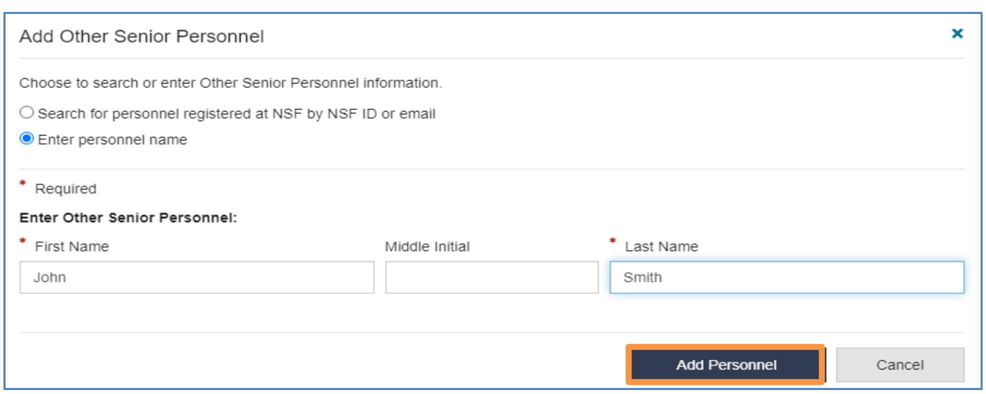
**5B** **To add the individual by name, enter the individual's first and last name in the fields provided.**

- The individual is not required to have an NSF ID (NSF account) for this method.



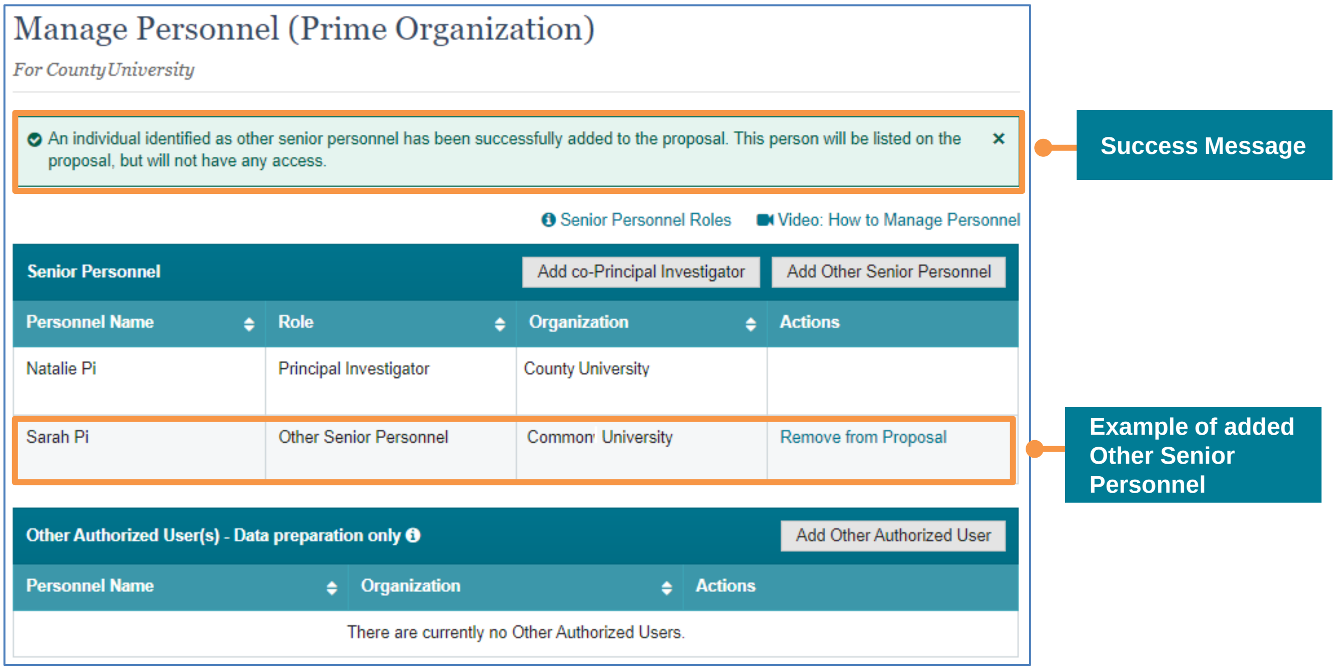

**6** **Click the Add Personnel button for the selected Other Senior Personnel whether they are added by NSF ID or email address, or they are added by name.**



**7 A success message confirms the individual was added as Other Senior Personnel.**

- The individual added as Other Senior Personnel does not receive an automated email notification.
- Individuals added as Other Senior Personnel cannot view, access, or edit the proposal.

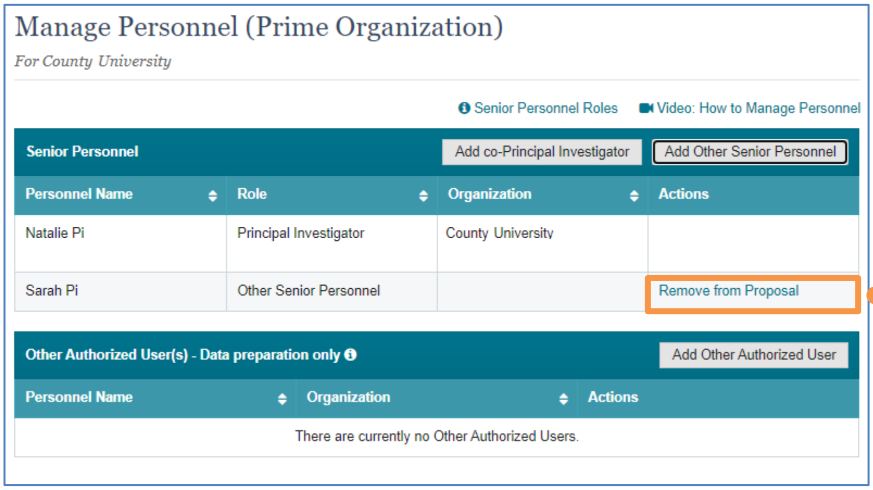



### Tips When Adding co-PIs and Other Senior Personnel

- An individual **cannot** be added to a proposal more than once.
- Examples:
  - An individual **cannot** be added on a proposal as Senior Personnel and also as an Other Authorized User (OAU).
  - An individual **cannot** be added as Senior Personnel on a proposal for more than one organization, such as adding someone as a co-PI for the prime organization and adding the same person as Senior Personnel for a subrecipient organization.

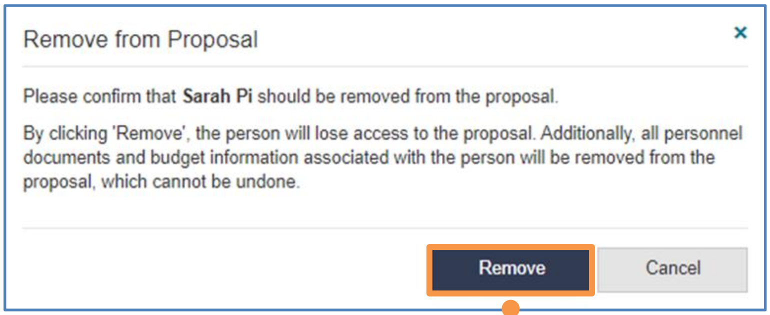
## *Removing Other Senior Personnel*

**1 To remove Other Senior Personnel, click the Remove from Proposal link for the selected individual.**



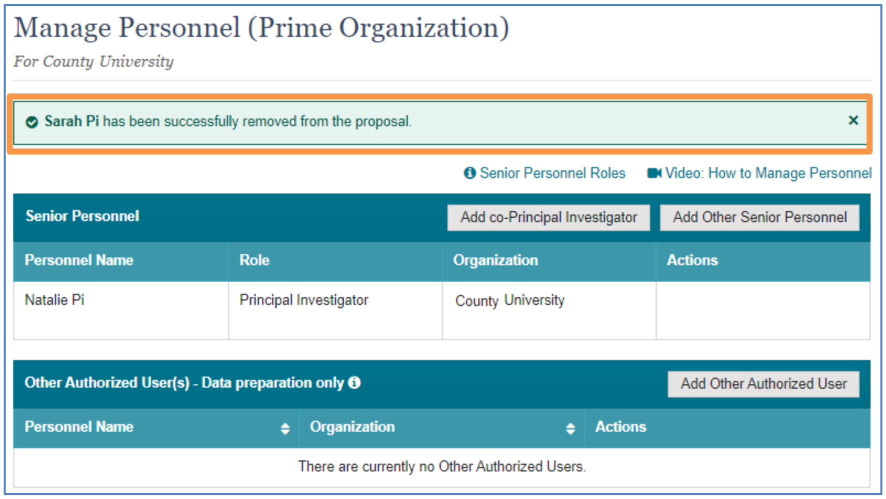

**Remove from Proposal link**

**2 Click the Remove button to confirm removal of the selected Other Senior Personnel.**




**Remove button**

**3 View the success message to confirm the Other Senior Personnel was removed.**




**Success message**

## Helpful Resources

- **Help within the Proposal System**
  Inline help features such as tooltips and links to relevant *Proposal & Award Policies & Procedures Guide* sections are included throughout the Research.gov Proposal Submission System.

- **NSF System-Related Proposal Preparation FAQs**
  System-related FAQs organized by topic are available on the Research.gov About Proposal Preparation and Submission page left navigation bar.

- **Research.gov About Proposal Preparation and Submission Page**
  Bookmark https://www.research.gov/research-web/content/aboutpsm to quickly access system-related Frequently Asked Questions (FAQs), video tutorials, and how-to guides.

- **Research.gov Proposal Preparation Demo Site**
  All demo site users are automatically given the PI role for demo site purposes, in order to perform the proposal preparation functions that a PI can do in the actual system. See the demo site FAQs on the Research.gov About Proposal Preparation and Submission page left navigation bar for information on demo site access and features.

- **Video Tutorials**
  Videos demonstrating key proposal preparation steps are available on the Research.gov About Proposal Preparation and Submission page Video Tutorials section.

- **Automated Proposal Compliance Checks**
  Automated proposal compliance checks triggering an error message will stop proposal submission to NSF, whereas checks triggering a warning message will still allow proposal submission. Expanded compliance checking in Research.gov helps to reduce administrative burden for the research community and NSF staff, as well as minimizes return without review proposals. Refer to the Automated Compliance Checking of NSF Proposals page for the current automated Research.gov proposal checks.

- **Adding and Managing User Roles**
  To request an organizational role, please see the *Add a New Organizational Role* section of the Account Management Guide. After an organizational user role is requested, the organization's Administrator will receive the request electronically to approve or disapprove it. Additional information about adding and managing user roles can be found on the Research.gov About Account Management page.

- **NSF IT Service Desk**
  IT system-related and technical questions may be directed to the NSF IT Service Desk at 1-800-381-1532 (7:00 AM - 9:00 PM ET; Monday - Friday except federal holidays) or via rgov@nsf.gov.