

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](#) page.

## Adding a co-PI

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

**Manage Personnel and Subaward Organizations button**

**Proposal - 23188**

**Proposal Title:** The Example Proposal [Edit](#)

**Funding Opportunity:** NSF 20-563 [Edit](#) - Cyber-Physical Systems

**Where to Apply:** Direct For Computer & Info Scie & Enginr (CSE) - Division Of Computer and Network Systems (CNS), CPS- Cyber-Physical Systems

**Proposal Type:** Research

**Submission Type:** Full Proposal

**Collaborative Type:** Not Collaborative

**Due Date:** [Select Due Date](#) [Edit](#)

**Date Type:** [Deadline Date](#)

Proposal Actions	Proposal Sections	Last Updated	Compliance Status <a href="#">[Key]</a>
<b>Required</b>			
<div style="border: 1px solid #00728f; padding: 5px; margin-bottom: 5px;"> <a href="#">Share Proposal with SPO/AOR</a> </div> <div style="border: 2px solid #00728f; padding: 5px; margin-bottom: 5px;"> <a href="#">Manage Personnel and Subaward Organizations</a> </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <a href="#">Print Proposal</a> </div> <div style="border: 1px solid #ccc; padding: 5px;"> <a href="#">Delete Proposal</a> </div>	Cover Sheet		Form not checked
	Project Summary		Document unavailable for check
	Project Description		Document unavailable for check
	References Cited		Document unavailable for check
	Budget(s)		Form not checked
	Budget Justification(s)		Document unavailable for check
	Facilities, Equipment and Other Resources		Document unavailable for check
	Senior Personnel Documents <a href="#">i</a>		Document(s) unavailable for check
Data Management Plan		Document unavailable for check	

**Proposal Details**

[i](#) **Proposal Status:** Not Shared with SPO/AOR

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

My Desktop > Proposal Preparation > Proposal - 23900 > Manage Personnel and Subaward Organizations

## Manage Personnel and Subaward Organizations

**Prime Organization**

Organization Name	Unique Entity Identifier (UEI)	Principal Investigator	Address	Actions
County University		Natalie PI	1000 Circle County, MD 21250-0002 US	<div style="border: 2px solid #00728f; padding: 2px 5px; display: inline-block;"> <a href="#">Manage Personnel</a> </div>

[Add Subaward Organization](#)

**Subaward Organization(s)**

Organization Name	Unique Entity Identifier (UEI)	Address	Actions
No Subaward Organizations have been added. Once an organization is added, the personnel for this organization can be specified.			

**Manage Personnel link**

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

**Manage Personnel (Prime Organization)**  
*For County University*

Senior Personnel Roles Video: How to Manage Personnel

Personnel Name	Role	Organization	Actions
Natalie Pi	Principal Investigator	County University	

Other Authorized User(s) - Data preparation only Add Other Authorized User

Personnel Name	Organization	Actions
There are currently no Other Authorized Users.		

## 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.

**Add co-Principal Investigator (co-PI)**

Search for co-PI:

NSF ID Email

000487385 OR Search

Add Personnel Cancel

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

**Add co-Principal Investigator (co-PI)**

Search for co-PI:

NSF ID Email

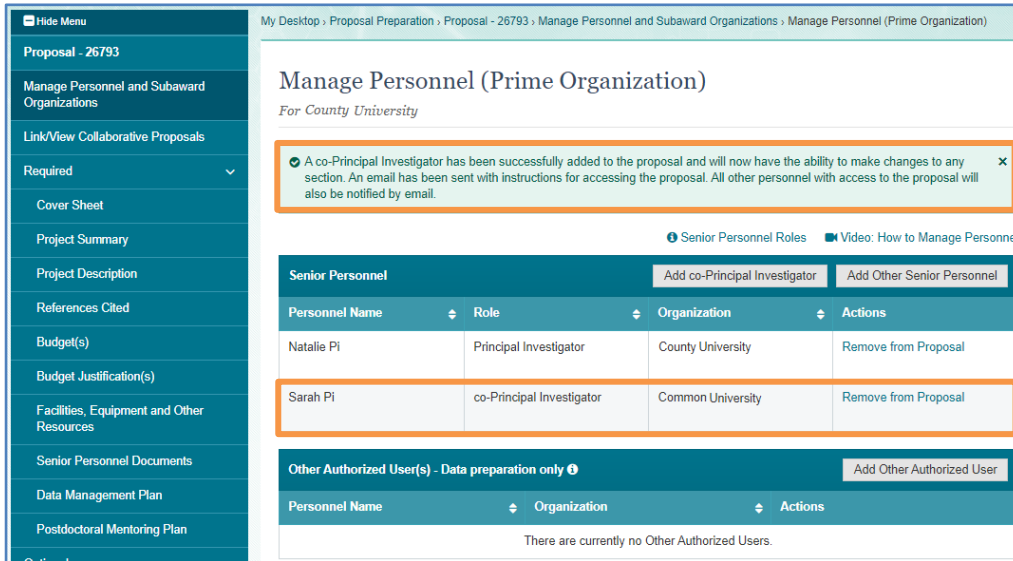
000487385 OR Search

Select	Personnel Name	NSF ID	Email	Organization
<input checked="" type="radio"/>	Sarah Pi	000487385	s*****@cu.edu	Common University

Add Personnel Cancel

## 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.



The screenshot shows the 'Manage Personnel (Prime Organization)' page for 'County University'. A success message is displayed at the top, stating: 'A co-Principal Investigator has been successfully added to the proposal and will now have the ability to make changes to any section. An email has been sent with instructions for accessing the proposal. All other personnel with access to the proposal will also be notified by email.' Below the message is a table of 'Senior Personnel'.

Personnel Name	Role	Organization	Actions
Natalie PI	Principal Investigator	County University	Remove from Proposal
Sarah PI	co-Principal Investigator	Common University	Remove from Proposal

Below the table is a section for 'Other Authorized User(s) - Data preparation only' with a button to 'Add Other Authorized User'.

Success Message

Example of added co PI

## Removing a co-PI

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



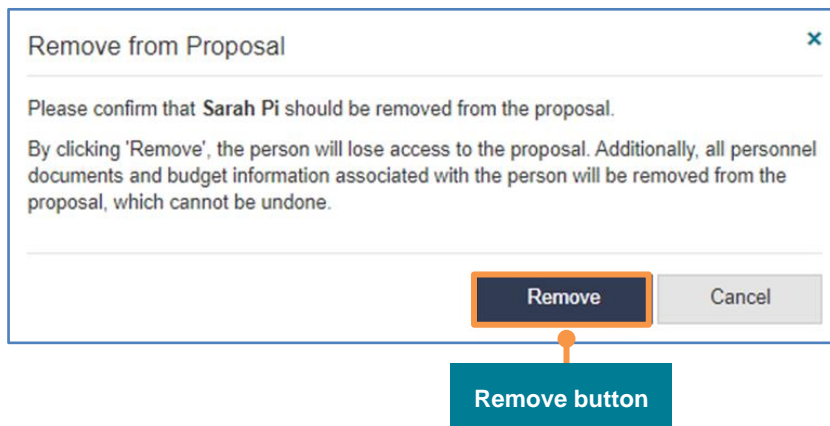
The screenshot shows the 'Manage Personnel (Prime Organization)' page for 'County University'. The 'Senior Personnel' table is visible, with the 'Remove from Proposal' link for Sarah PI highlighted by an orange box.

Personnel Name	Role	Organization	Actions
Natalie PI	Principal Investigator	County University	Remove from Proposal
Sarah PI	co-Principal Investigator	Common University	Remove from Proposal

Below the table is a section for 'Other Authorized User(s) - Data preparation only' with a button to 'Add Other Authorized User'.

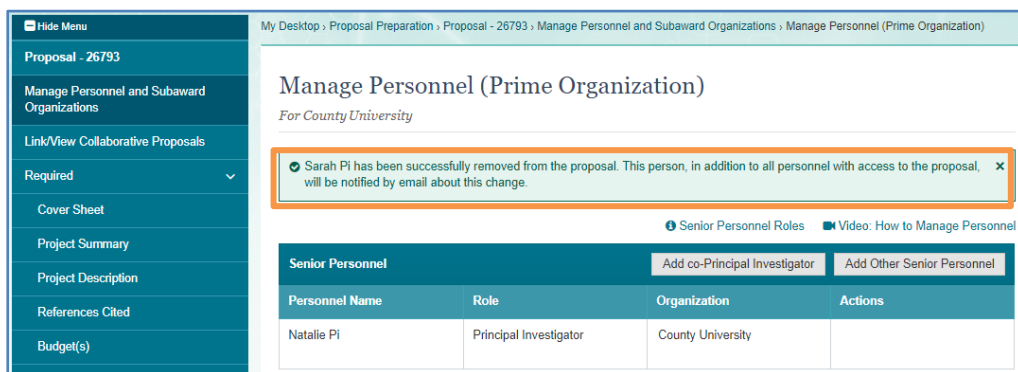
Remove from Proposal link

## 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.

Proposal - 23188

Proposal Title: The Example Proposal [Edit](#)

Funding Opportunity: NSF 20-563 [Edit](#) - Cyber-Physical Systems

Where to Apply: Direct For Computer & Info Scie & Enginr (CSE) - Division Of Computer and Network Systems (CNS), CPS- Cyber-Physical Systems

Proposal Type: Research

Submission Type: Full Proposal

Collaborative Type: Not Collaborative

Due Date: [Select Due Date](#) [Edit](#)

Date Type: Deadline Date

Proposal Actions	Proposal Sections	Last Updated	Compliance Status [Key]
<a href="#">Share Proposal with SPO/AOR</a> <a href="#">Manage Personnel and Subaward Organizations</a> <a href="#">Print Proposal</a> <a href="#">Delete Proposal</a>	<b>Required</b> Cover Sheet Project Summary Project Description References Cited Budget(s) Budget Justification(s) Facilities, Equipment and Other Resources Senior Personnel Documents <a href="#">i</a> Data Management Plan		Form not checked Document unavailable for check Document unavailable for check Document unavailable for check Form not checked Document unavailable for check Document unavailable for check Document(s) unavailable for check Document unavailable for check

**Proposal Details**

[Proposal Status:](#)  
Not Shared with SPO/AOR

**Manage Personnel and Subaward Organizations button**

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

My Desktop > Proposal Preparation > Proposal - 23900 > Manage Personnel and Subaward Organizations

### Manage Personnel and Subaward Organizations

Prime Organization					
Organization Name	DUNS Number	Principal Investigator	Unique Entity Identifier (UEI)	Address	Actions
County University	061364808	Nata		1000 Circle County, MD 21250-0002 US	<a href="#">Manage Personnel</a>

**Subaward Organization(s)** [Add Subaward Organization](#)

Organization Name	DUNS Number	Unique Entity Identifier (UEI)	Actions
No Subaward Organizations have been added. Once an organization is added, the personnel for this organization can be specified.			

**Manage Personnel link**

## 3 Click the Add Other Senior Personnel button.

**Manage Personnel (Prime Organization)**  
*For County University*

Senior Personnel Roles Video: How to Manage Personnel

Senior Personnel	Add co-Principal Investigator Add Other Senior Personnel		
Personnel Name	Role	Organization	Actions
Natalie Pi	Principal Investigator	County University	

Other Authorized User(s) - Data preparation only Add Other Authorized User

Personnel Name	Organization	Actions
There are currently no Other Authorized Users.		

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

**Add Other Senior Personnel**

Choose to search or enter Other Senior Personnel information.

☒ Search for personnel registered at NSF by NSF ID or email  
☐ Enter personnel name

Search for Other Senior Personnel:

NSF ID Email

OR

## 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).

**Add Other Senior Personnel**

Choose to search or enter Other Senior Personnel information.

☒ Search for personnel registered at NSF by NSF ID or email  
☐ Enter personnel name

Search for Other Senior Personnel:

NSF ID Email

OR

**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.

Add Other Senior Personnel

Choose to search or enter Other Senior Personnel information.

☐ Search for personnel registered at NSF by NSF ID or email  
☒ Enter personnel name

\* Required

**Enter Other Senior Personnel:**

\* First Name      Middle Initial      \* Last Name

John           Smith

Add Personnel      Cancel

**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.**

Add Other Senior Personnel

Choose to search or enter Other Senior Personnel information.

☒ Search for personnel registered at NSF by NSF ID or email  
☐ Enter personnel name

**Search for Other Senior Personnel:**

NSF ID      Email

000487385      OR           Search

Select	Personnel Name	NSF ID	Email	Organization
<input checked="" type="radio"/>	Sarah Pi	000487385	s*****@cu.edu	Common University

Add Personnel      Cancel

Add Other Senior Personnel

Choose to search or enter Other Senior Personnel information.

☐ Search for personnel registered at NSF by NSF ID or email  
☒ Enter personnel name

\* Required

**Enter Other Senior Personnel:**

\* First Name      Middle Initial      \* Last Name

John           Smith

Add Personnel      Cancel

## 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.

**Manage Personnel (Prime Organization)**  
*For County University*

✓ An individual identified as other senior personnel has been successfully added to the proposal. This person will be listed on the proposal, but will not have any access. ✕

[Senior Personnel Roles](#)   [Video: How to Manage Personnel](#)

Senior Personnel			Add co-Principal Investigator	Add Other Senior Personnel
Personnel Name	Role	Organization	Actions	
Natalie Pi	Principal Investigator	County University		
Sarah Pi	Other Senior Personnel	Common University	Remove from Proposal	

**Other Authorized User(s) - Data preparation only** Add Other Authorized User

Personnel Name	Organization	Actions
There are currently no Other Authorized Users.		

Success Message

Example of added Other Senior Personnel

## 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.

Manage Personnel (Prime Organization)  
For County University

Senior Personnel Roles Video: How to Manage Personnel

Senior Personnel Add co-Principal Investigator Add Other Senior Personnel

Personnel Name	Role	Organization	Actions
Natalie Pi	Principal Investigator	County University	
Sarah Pi	Other Senior Personnel		Remove from Proposal

Other Authorized User(s) - Data preparation only Add Other Authorized User

Personnel Name	Organization	Actions
There are currently no Other Authorized Users.		

Remove from  
Proposal link

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

Remove from Proposal

Please confirm that Sarah Pi should be removed from the proposal.

By clicking 'Remove', the person will lose access to the proposal. Additionally, all personnel documents and budget information associated with the person will be removed from the proposal, which cannot be undone.

Remove Cancel

Remove button

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

Manage Personnel (Prime Organization)  
For County University

Senior Personnel Roles Video: How to Manage Personnel

Senior Personnel Add co-Principal Investigator Add Other Senior Personnel

Personnel Name	Role	Organization	Actions
Natalie Pi	Principal Investigator	County University	

Other Authorized User(s) - Data preparation only Add Other Authorized User

Personnel Name	Organization	Actions
There are currently no Other Authorized Users.		

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](mailto:rgov@nsf.gov).