Account Management Guide

List of Account Management Job Aids

Instructions: Scroll down to each job aid in this guide or use the links below to navigate directly to the job aid.

Reviewer Job Aids

Register for a New NSF Account

Account Management

Register for a New NSF Account

To submit proposals to NSF and conduct other award-related activities using NSF systems, you must have an NSF ID. Proposers submitting NSF proposals via Grants.gov must also have an NSF ID. You may only have one NSF ID. This ID is a unique alphanumeric identifier assigned to users by NSF through the registration process outlined below. The NSF ID is yours for you to use no matter your organizational affiliation(s) in the future. Follow the step-by-step process to create a new NSF account to be assigned an NSF ID. A [Register for a New NSF Account](#) video tutorial is also available.

Step 1: Confirm you do not have an existing NSF account

- If you forgot your password for an established NSF account, follow the below steps to reset it:
  - Open [Research.gov](#) and click **"Sign In"** located at the top of the screen. (Figure 1).
  - Click **"Continue to Research.gov Sign In Options."** (Figure 2)
  - Enter your Primary Email Address or NSF ID and click **"Next."** (Figure 3)
  - Click **"Forgot Password ?"** (Figure 4)
  - Click **"Send me an email"** (Figure 5) to have a verification email sent to the registered email address on your account. An email will be sent to you prompting a password reset. Select the "**Reset Password**" link within the email and follow the instructions to reset your password. Note that your email address can only be associated with one NSF account (i.e., only one NSF ID per person).
- If you do have an existing NSF account and you know your password, you can edit your account profile information by selecting the **"My Profile"** option located on the top right of [Research.gov](#) homepage after signing in and completing authentication. See [View and Edit My NSF Account Profile Information](#) for detailed information on **"My Profile"** functions.
- If you do not have an existing NSF account, proceed to Step 2.

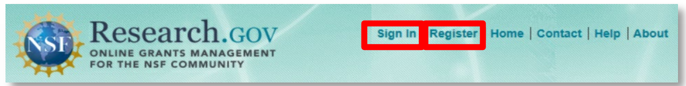


Figure 1

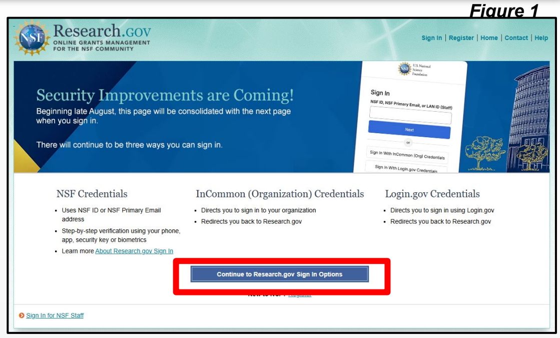


Figure 2

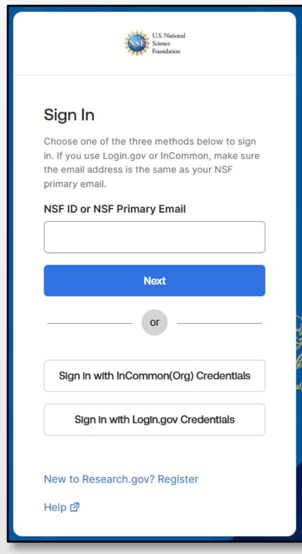


Figure 3

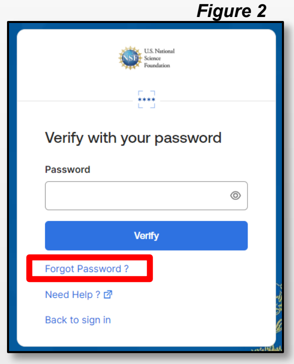


Figure 4

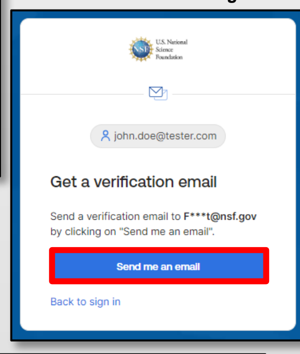


Figure 5

Step 2: Access the Account Registration page

- Open [Research.gov](#)
- Click **"Register"** located at the top of the screen. (Figure 1)

Step 3: Complete the Account Registration page

- Input the requested account registration information. (Figure 6)

<u>Important Note</u>: Ongoing access to your primary email address is required for NSF communications and account recovery, so a personal email address (e.g., a Gmail address) is recommended. If you sign into Research.gov using InCommon or Login.gov credentials, use your InCommon organization email or registered Login.gov email address for your primary email address and provide your personal email address as your secondary email to ensure ongoing access.

Your primary email address must be unique to you and cannot be a group email alias.

Changes to your primary email address can be made on your My Profile page following successful registration.

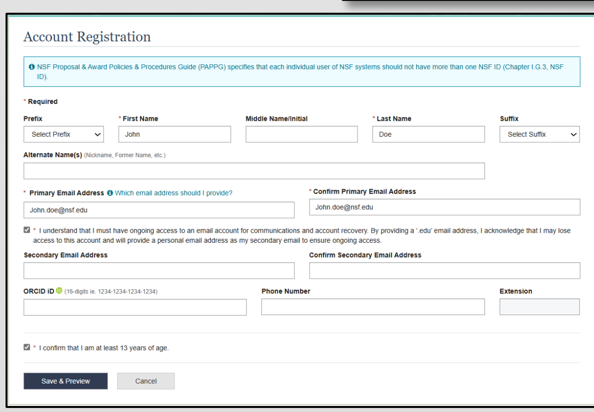


Figure 6

Account Management

Register for a New NSF Account (continued)

(Continuation of steps to complete the Account Registration page)

- If your primary email address domain suffix is "edu", an important message and checkbox will display. Check the box to confirm ongoing access to an email account is required for communications and account recovery. By providing a ".edu" email address, you may lose access to this account and should provide a personal email address as your secondary email to ensure ongoing access.
- Check the box to confirm that you are at least 13 years of age. (Figure 7)
- Click **"Save & Preview."** (Figure 7)
- Verify that your account registration information is correct on the Preview Account Registration screen. (Figure 8)
- If you need to update your account registration information, select the "**Edit**" button to return to the previous screen.
- Check the box to confirm you are not a robot and click **"Submit."** (Figure 8)
- You will receive an Account Registration Confirmation on the screen. (Figure 9)
- Check the primary email account that you just used for two messages: one containing your new NSF ID and another containing your temporary password.

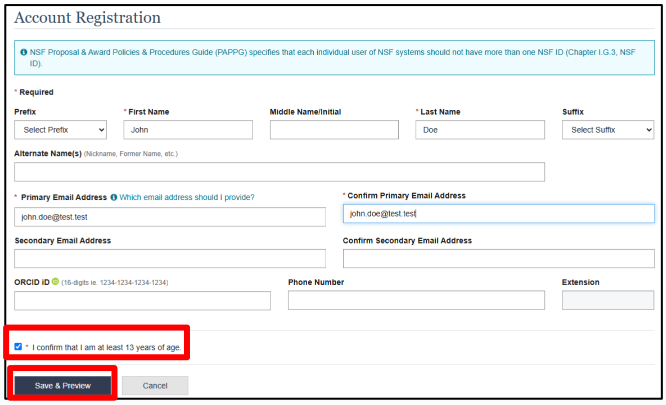


Figure 7

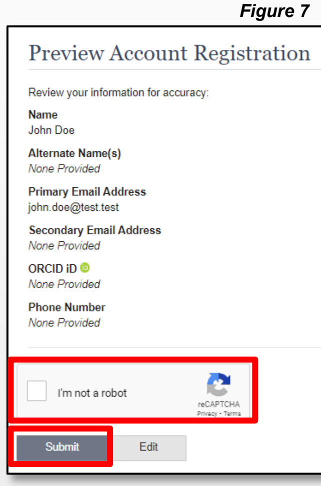


Figure 8

Step 4: Set up your password for your new NSF Account

- Click **"Return to Sign In"** (Figure 9) or select **"Sign In"** on the top of Research.gov. (Figure 1)
- Click **"Continue to Research.gov Sign In Options."** (Figure 10)
- Enter your Primary Email Address or NSF ID and click **"Next"**. (Figure 11)
- Enter your temporary password and click **"Verify."** (Figure 12)
- Set a new password for your account and click **"Change Password."** (Figure 13)
- Check the primary email account that you used for an email confirming that your password has been changed.

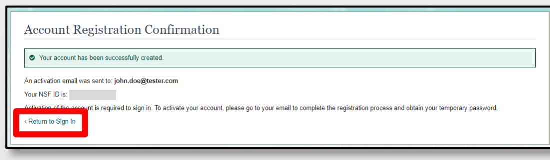


Figure 9

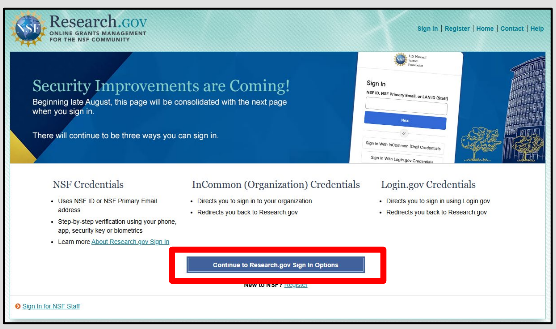


Figure 10

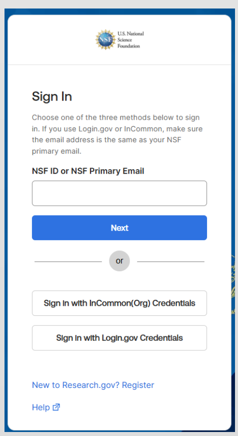


Figure 11

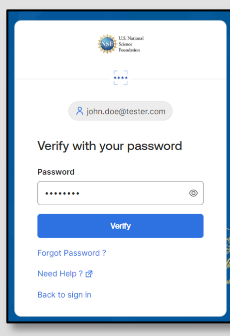


Figure 12

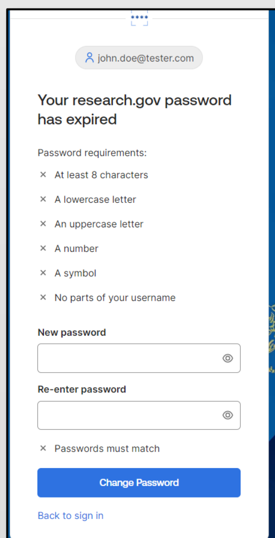


Figure 13

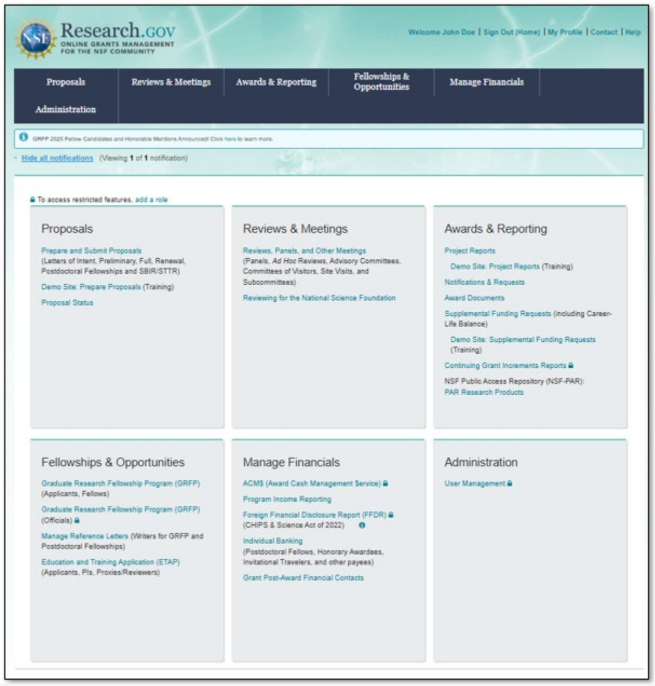


Figure 14

Step 5: Set up your preferred security method to access your account

- Once you complete resetting your password, you will be prompted to set up your security method (i.e., multifactor authentication method) for accessing your account. Follow the corresponding prompts to set up your preferred security method. *For more information on setting up your preferred security method including how-to guides, video tutorials and FAQs, visit the About Signing Into Research.gov page.*
- Once you have completed setting up your preferred security method, you will be redirected to the Research.gov homepage. (Figure 14)
- You have successfully registered for a new NSF account!

Step 6: Add a new organization role

- Now that you have an NSF account, you can add organizational roles to your account profile. For detailed instructions, see Add a New Organizational Role.

***Important Note:* Reviewers, GRFP Applicants, GRFP Fellows, and fellowship reference letter writers will not add an organizational role. GRFP-specific Account Management training resources including guides and FAQs are available on the GRFP Account Management page.**

Working at Multiple Organizations or Moving to Another Organization

Working at Multiple Organizations or Moving to Another Organization

It is NSF policy that only one NSF account is allowed per user. If you already have an NSF account, you MUST NOT register for a new NSF account even if you are working at multiple organizations, moving to another organization, or working as a Postdoctoral Fellow. Instead, you can add roles to your existing NSF account.

You do NOT need a separate NSF account for each organization you are affiliated with or a new NSF account when moving to a new organization or working as a Postdoctoral Fellow.

- You can have multiple organizations associated with your NSF account, and you can add new roles from different organizations to your existing NSF account.
    - To add an organization-approved role from a new organization or to add the Proposed Postdoctoral Fellow role, see Add a New Organizational Role.
- If you are associated with multiple organizations, be sure to update your designated Primary Organization on the "View My Roles" page. For more information on changing your Primary Organization, see View My Organizational Roles – Active Role(s).
- If you are leaving an organization, make sure the primary or secondary email address on your NSF account profile is set to an email address you will continue to have access to after your departure (e.g., a Gmail address). For more information on editing your NSF account profile, see View and Edit My NSF Account Profile Information.

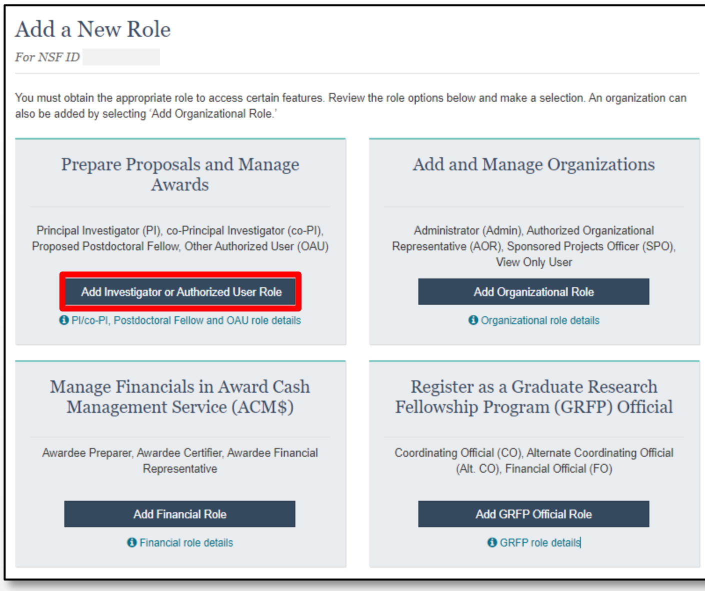


Figure 1

Adding a PI role at a new organization to your existing NSF account

- Click **"Sign In"** located at the top right of Research.gov page.
- Click **"Sign In Using NSF Credentials"**, enter your credentials (e.g., NSF ID and password) and sign in using your selected security method (i.e., multifactor authentication method). If you have not set up your preferred security method yet, you will be prompted to complete this activity to access your account. *For more information on setting up your preferred security method including how-to guides, video tutorials, and FAQs, visit the About Signing Into Research.gov page.*
- Click **"My Profile"** located at the top right of the screen.
- Click **"Add a New Role"** from the left navigation bar and **the "Add a New Role"** page will display. (Figure 1)
- To request the Investigator role, click the blue "**Add Investigator or Authorized User Role"** button located in the "Prepare Proposals and Manage Awards" box. (Figure 1)
- Select **"Principal Investigator (PI) or co-Principal Investigator (co-PI)"**, click **"Submit"** (Figure 2) and a four-step role request wizard will display. (Figure 3)

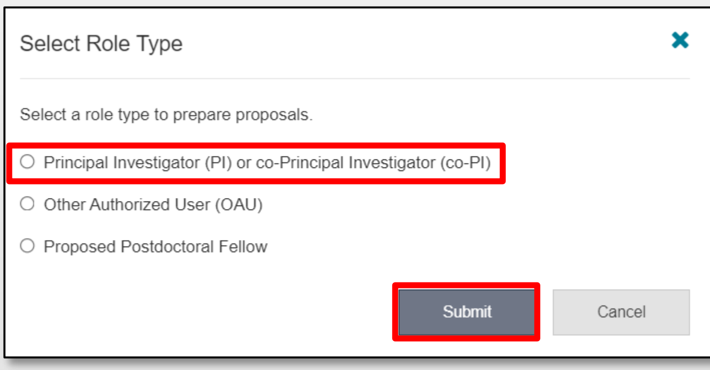


Figure 2

Account Management

Working at Multiple Organizations or Moving to Another Organization (continued)

Step 1: Find Organization

- Enter the organization's System for Award Management (SAM) issued Unique Entity Identifier (UEI) and click **"Search"** (Figure 3). If you already have an organization-approved role at NSF, you can select the SAM UEI associated with your existing organization from the drop-down menu.
- Verify the correct organization is displayed and click "**Next.**" (Figure 3)

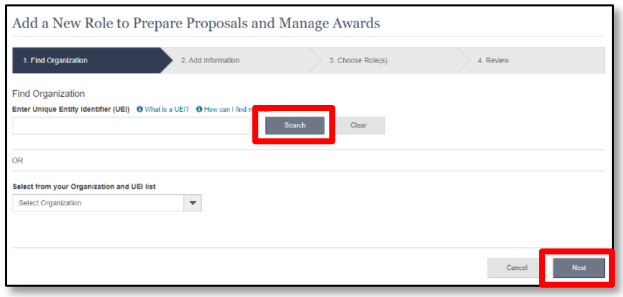


Figure 3

Step 2: Add Information

- Complete the required fields denoted by a red asterisk (*) and click "**Next**." (Figure 4)

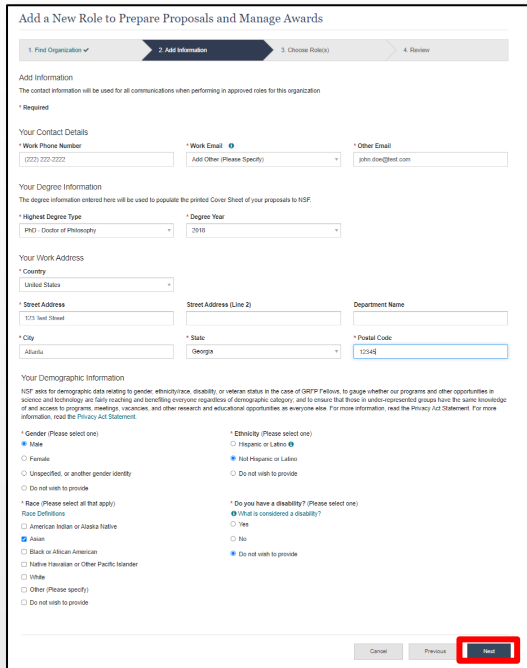


Figure 4

Step 3: Choose Role(s)

- The "Principal Investigator" role is pre-selected. Click **"Next."** (Figure 5)

Step 4: Review and Submit

- Review your information for accuracy and click "**Submit.**" (Figure 6)

Figure 5

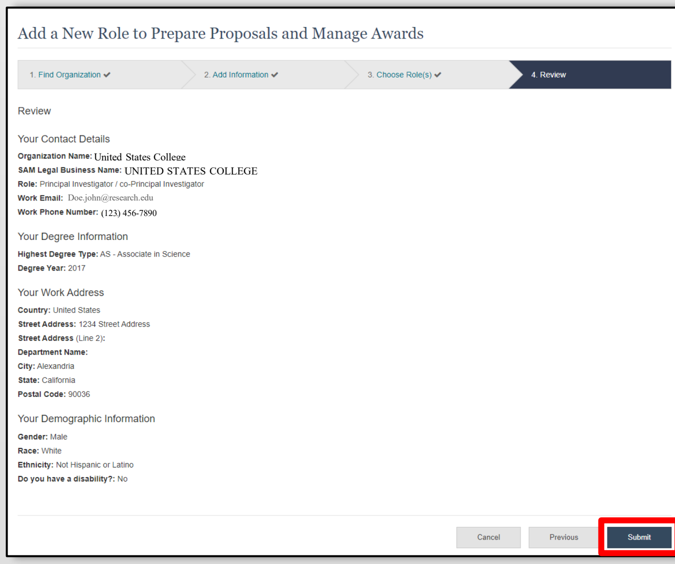


Figure 6

Note: *For more information about SAM UEIs, please visit [SAM.gov](SAM.gov) or contact your Sponsored Projects Office (SPO).*

Working at Multiple Organizations or Moving to Another Organization (continued)

Success!

- Your role request is sent to the listed organizational contacts for review and approval. (Figure 7)
- You have successfully submitted a role request!

***<u>Important Note</u>*: Any demographic information provided will not be shared with the listed organizational contacts when they review and approve your role request.**


Add a New Role to Prepare Proposals and Manage Awards

Success - your request has been forwarded to the organization contact(s) below. Check the status of this request on the View My Roles page.

Organization Contact(s)	Organization Contact Type
Doe, John	Administrator
Carey, Mariah	SAM POC
Jolie, Angelina	SAM POC
Doe, Jane	SAM POC

Continue to My Profile ›

Add Additional Roles ›

Figure 7

Helpful Tips

- For your primary email address, ongoing access to an email account is required for communications and account recovery. By providing a ".edu" email address, you may lose access to this account and should provide a personal email address as your secondary email to ensure ongoing access. If you no longer have access to your primary email address, your secondary email address can be used to reset your password.
- Your work email address is associated with all your roles at a particular organization. It is used for role requests and approval notifications as well as for proposal and award related notifications.
- The Degree Information section will be pre-populated if you previously provided this information. If you update this section, the change will be reflected within the "Academic/Professional Information" tab in My Profile and on the "Edit Your Contact Information" page on "View My Roles" for all organizations where you have an organization-approved PI role.
- The Demographic Information section will be pre-populated if you have already provided this information. If you update this section, the demographic information changes will be reflected for all organizations where you have an organization-approved PI role and within the "Demographic Information" tab in My Profile.
- By default, the latest PI role will be set to primary.

Navigating the Account Management Links

Navigating the Account Management Links

The Account Management System includes screens for Administrators to manage user and organization information and screens for users to self-manage their organizational roles and profile information. Access these screens and the functionality by signing into Research.gov and clicking on the "My Profile" link in the top right.

Access the left navigation bar in Account Management

- Open Research.gov
- Click **"Sign In"** located at the top right of the screen. (Figure 1)
- Click **"Continue to Research.gov Sign In Options"**, enter your credentials (e.g., NSF ID and password) and sign in using your selected security method (i.e., multifactor authentication method) (Figure 2). If you have not set up your preferred security method yet, you will be prompted to complete this activity to access your account. *For more information on setting up your preferred security method including how-to guides, video tutorials, and FAQs, visit the About Signing Into Research.gov page.*
- Once you've successfully signed in using your preferred security method, click on **"My Profile"** located at the top right of the screen. (Figure 3)

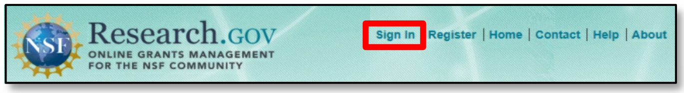


Figure 1

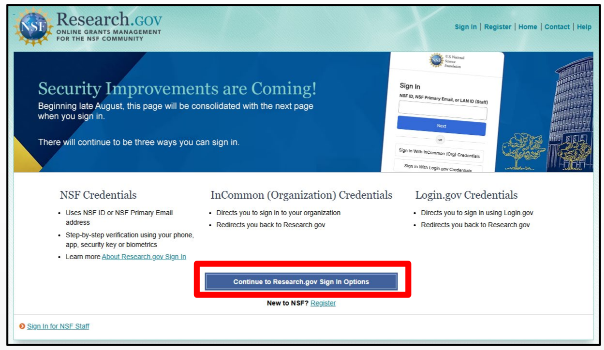


Figure 2

Figure 3

***Important Note**: NSF enabled Login.gov to sign into Research.gov in 2022. Use of Login.gov to sign into Research.gov is optional, and the research community is still able to use their NSF account or their organization-issued credentials through the InCommon integration to sign into Research.gov. Users can use any of the three options to sign into Research.gov and will be navigated to the Research.gov homepage after successful sign-in. This guide provides instructions for only the **"NSF Account"** sign in option.*

Where do the left navigation bar links take me?

Account Management Link	Functionality
My Profile / View/Edit My Profile	View and edit your profile, demographic, and academic information
Change Password or Security Methods	Change your Research.gov NSF account password or preferred security method
View My Roles	View pending and active roles, and edit organizational contact information
Add a New Role	Request a new role from an organization such as a Principal Investigator role
View My Users	*You will only see this link if you have an organization-approved Administrator role for an organization registered with NSF.* Approve and disapprove role requests, add and remove user roles, add and remove users from your organization, and invite users to create an NSF account so they can join your organization
About Account Management	Access job aids, instructional videos, and FAQs to guide you through the Account Management functionality

View and Edit My NSF Account Profile Information

View and Edit My NSF Account Profile Information

Once you have an NSF account, you can view and edit your account profile information at any time via the View/Edit My Profile page. Follow the step-by-step instructions below to update your account information including contact information, demographic information, and professional information. Demographic information is only displayed for Principal Investigators (PIs), GRFP Fellows, and reviewers.

On an annual basis, all users with an NSF account will be prompted to review their account profile information to ensure their information is up-to-date.

Step 1: Access the View/Edit My Profile page

- Open Research.gov
- Click **"Sign In"** located at the top right of the screen. (Figure 1)
- Click **"Continue to Research.gov Sign In Options"**, enter your credentials (e.g., NSF ID and password) and sign in using your selected security method (i.e., multifactor authentication method) (Figure 2). If you have not set up your preferred security method yet, you will be prompted to complete this activity to access your account. *For more information on setting up your preferred security method including how-to guides, video tutorials, and FAQs, visit the About Signing Into Research.gov page.*
- Once you've successfully signed in using your preferred security method, click **"My Profile"** from the top right of the screen. (Figure 3)

***Important Note*: You can also access the View/Edit My Profile page by clicking on "View/Edit Profile" located on the left navigation bar.** (Figure 4)

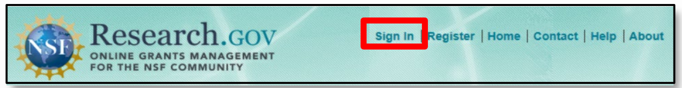


Figure 1

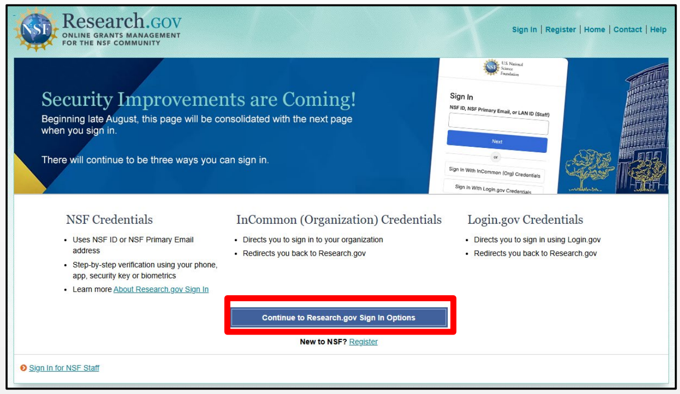


Figure 2

Figure 3

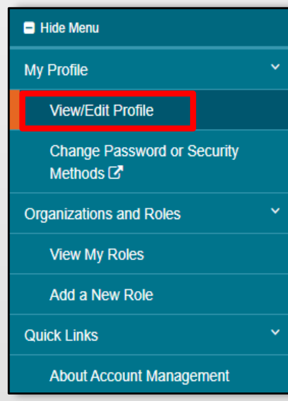


Figure 4

View and Edit My NSF Account Profile Information (continued)

Step 2: Edit your Contact Information

- Click **“Edit”** at the bottom of the **Contact Information** tab on the **My Profile** page. (Figure 5)
- Enter your updated contact information and click **“Save.”** (Figure 6)

***Important Notes*:**

- ***If you change your primary email address (i.e., the email address used to create your NSF account) and/or secondary email address, NSF will send you a verification email. You must verify the updated email address within four (4) hours, or your account email address will revert back to your last verified email address.***
- ***If your primary email address domain suffix is “edu”, an important message and checkbox will display. Check the box to confirm ongoing access to an email account is required for communications and account recovery. By providing a “.edu” email address, you may lose access to this account and should provide a personal email address as your secondary email to ensure ongoing access.*** (Figure 6)

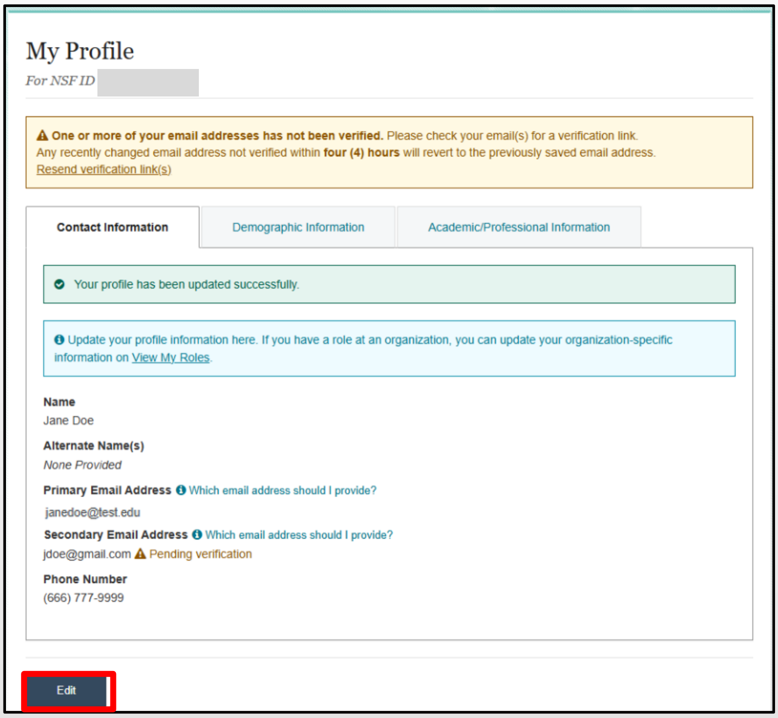


Figure 5

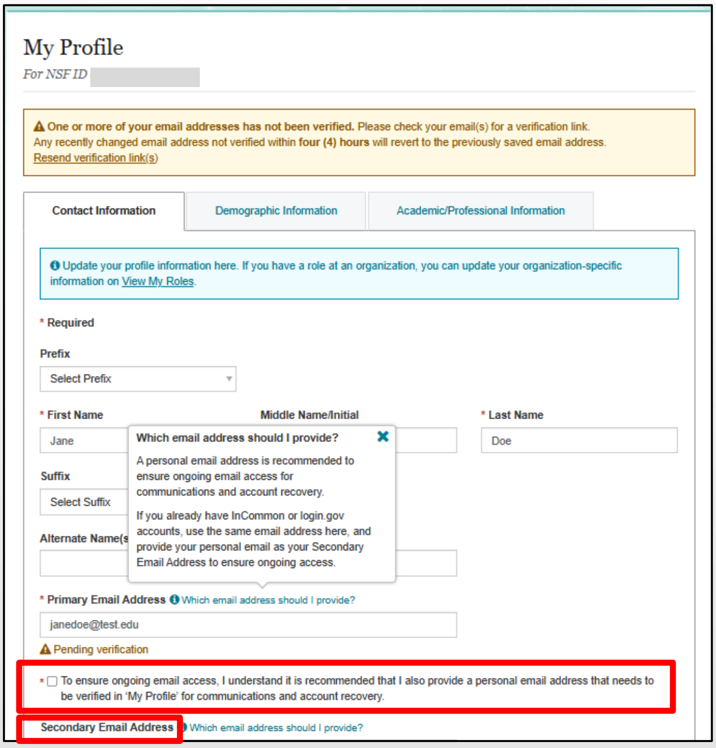


Figure 6

Helpful Tip

To ensure compliance with NSF’s policy of allowing only one NSF account per user, you will not be able to save any email addresses to your account profile that are associated with another NSF account.

View and Edit My NSF Account Profile Information (continued)

Step 3: Edit your Demographic Information (PI/co-PIs, GRFP Fellows and reviewers only)

- Click **"Edit"** at the bottom of the **Demographic Information** tab on the **My Profile** page. (Figure 7)
- Enter your demographic information and click **"Save."** (Figure 8)

Important Notes:

- ***Submission of the requested demographic information is required for PI/co-PIs, GRFP Fellows, and reviewers. Until responses to all demographic questions are provided, the "Save" button will be disabled.*** (Figure 8)
- ***The "Other" option for the race question will open an optional free text field for entry.*** (Figure 8)
- ***Users who are not PI/co-PIs, GRFP Fellows, or reviewers will not have the Demographic Information tab within "My Profile."*** (Figure 9)

Figure 7

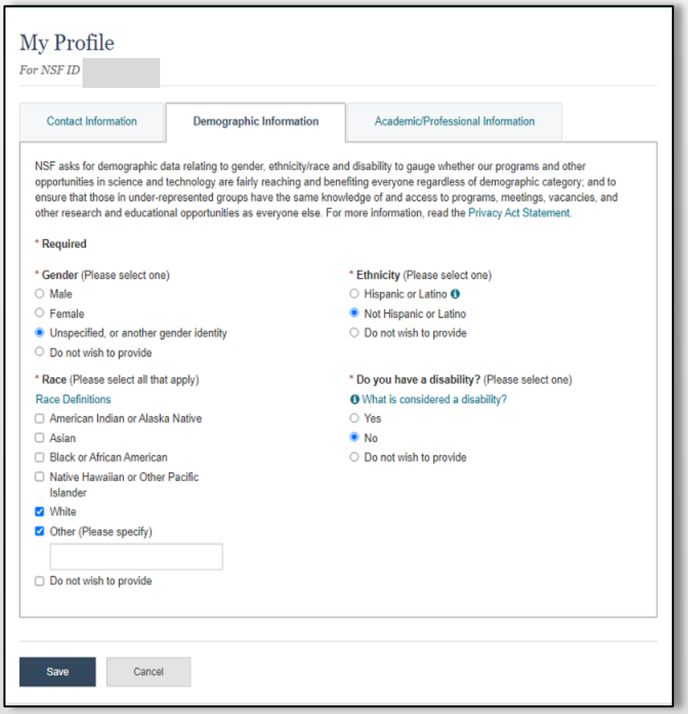


Figure 8

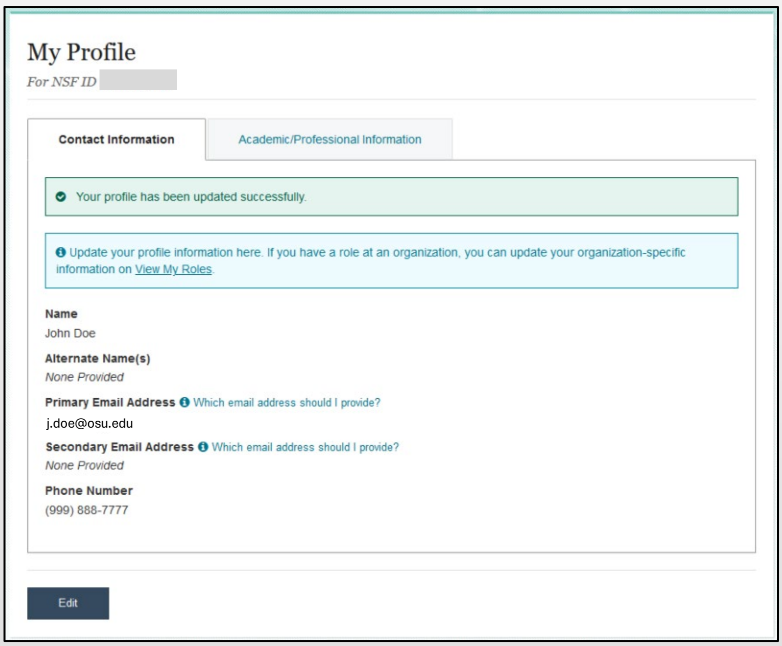


Figure 9

View and Edit My NSF Account Profile Information (continued)

Step 4: Edit your Academic/Professional Information

- Click **"Edit"** at the bottom of the **Professional Information** tab on the **My Profile** page. (Figure 10)
- Enter your updated academic and professional information and click **"Save."** (Figure 11)

<u>Important Notes:</u>

- ***Highest degree and area(s) of expertise are required for PIs and reviewers and optional for all other users.*** (Figure 11)
- ***Upon selection of your highest degree, you will be prompted to provide the year completed.*** (Figure 11)
- ***If your area(s) of expertise is not listed, you may enter a free text entry using the "Other" option.*** (Figure 12)

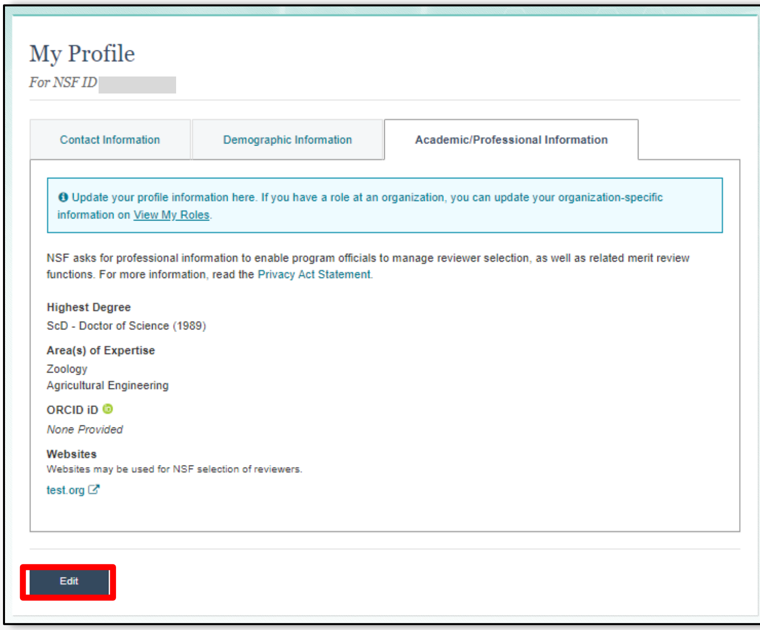


Figure 10

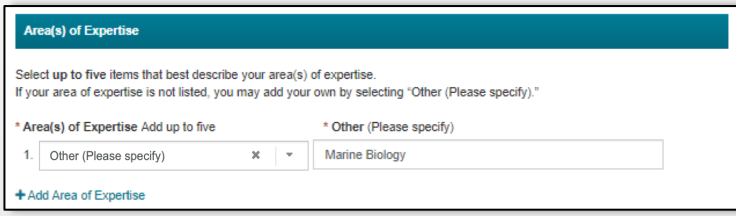


Figure 12

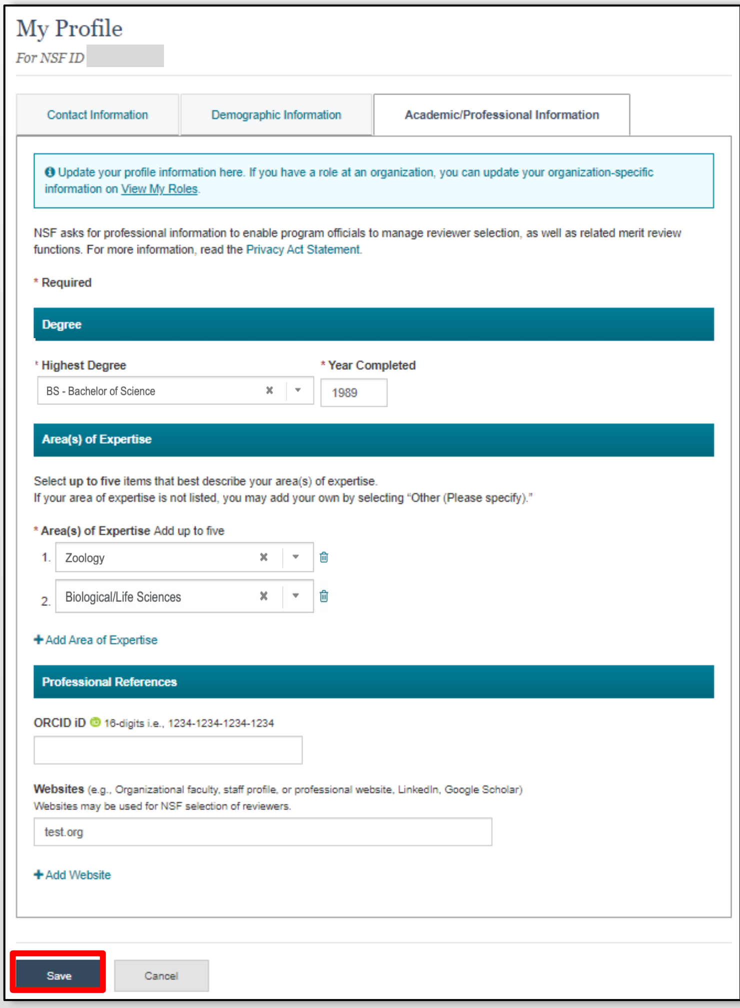


Figure 11

View and Edit My NSF Account Profile Information (continued)

When updating my primary and/or secondary email, what do I do if I accidentally delete the verification email sent by NSF?

- Select the **"View/Edit My Profile"** option. (Refer to Step 1 in the View and Edit My NSF Account Profile Information job aid)
- Within the **Email Verification Message** (Figure 13) located at the top of the **Contact Information** tab on the **My Profile** page, click "**Resend verification link(s)"** (Figure 14).
- A new verification email will be sent to your pending primary and/or secondary email address (i.e., the updated email address entered in Step 2 in the View and Edit My NSF Account Profile Information job aid).

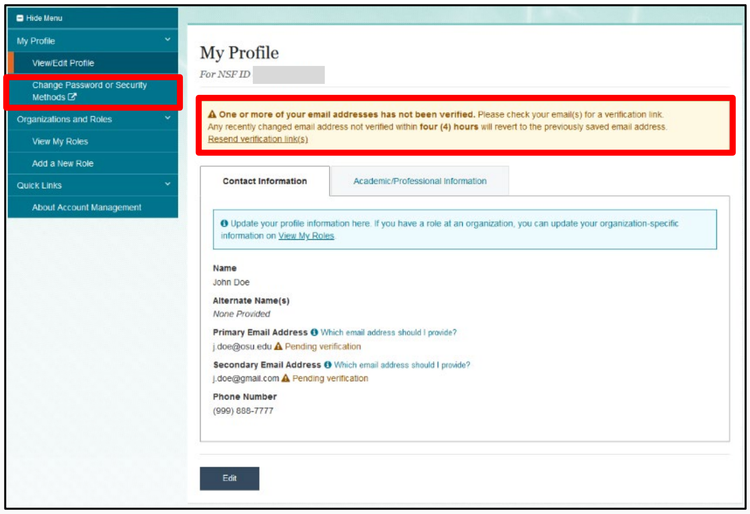


Figure 13

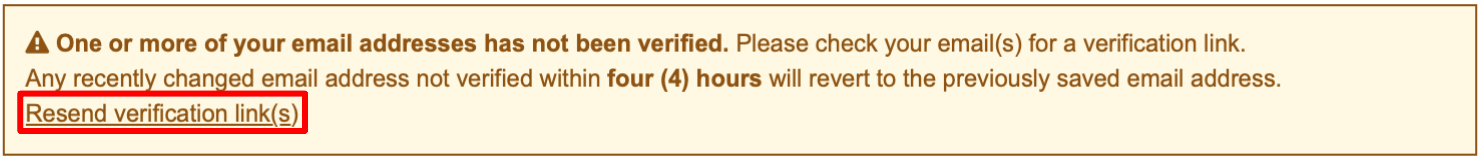


Figure 14

Important Notes:

- ***NSF will send you a verification email. You must verify the updated email address within four (4) hours, or your account email address will revert back to your last verified email address.***
- ***If the four (4) hours have passed, the resend verification email option will not be available and you will need to restart the process by updating your email address again. (Refer to Step 2 in the View and Edit My NSF Account Profile Information job aid)***

How do I change my password?

- Select the **"View/Edit My Profile"** option. (Refer to Step 1 in the View and Edit My NSF Reviewer Account Profile Information job aid)
- Click **"Change Password or Security Methods"** located in the left navigation bar. (Figure 13)
- A new tab will open allowing you to change your password or security method. *For more information on changing your password, visit the About Signing Into Research.gov page.*

Register a New Organization

Account Management

Register a New Organization

Organizations must be registered with NSF to submit proposals in Research.gov or via Grants.gov. Before a new prime awardee organization can register with NSF, it must first be registered in the System for Award Management (SAM) at SAM.gov, complete the required entity validation, and have a Unique Entity Identifier (UEI). Note that completion of the SAM registration process may take up to one month. Subrecipient organizations must also register with NSF after obtaining a SAM-issued UEI. However, subrecipient organizations do not need to complete the entity validation in SAM. Please check SAM.gov for information about any delays of SAM.gov registrations, validations and UEI issuance.

Follow the step-by-step process below to register a new organization with NSF. There is also a Register a New Organization with NSF video tutorial.

How do I register a new prime awardee organization with NSF?

- Open Research.gov
- Click **"Sign In"** located at the top right of the screen.
- Click **"Sign In Using NSF Credentials"**, enter your credentials (e.g., NSF ID and password) and sign in using your selected security method (i.e., multifactor authentication method). If you have not set up your preferred security method yet, you will be prompted to complete this activity to access your account. *For more information on setting up your preferred security method including how-to guides, video tutorials, and FAQs, visit the About Signing Into Research.gov page.*
- Once you've successfully signed in using your preferred security method, click **"My Profile"** located at the top right of the screen.
- Click **"Add New Role"** from the left navigation bar.
- Click "**Add Organizational Role**" located in the "**Add and Manage Organizations**" box. (Figure 1).
    - Note: If an organization is new to NSF, you must start the process by setting yourself up as the Administrator for the new organization. You must have an NSF account to start this process. The system will automatically detect that the organization is new and will walk you through setting up the organization and Administrator role.
- Enter your organization's Unique Entity Identifier (UEI) and click **"Search."**
    - If your organization is not already registered with NSF, a message will display to confirm that the organization is not found in NSF systems, and you will be able to register the organization and become the first Administrator. (Figure 2)
    - If your organization is already registered with NSF and has a new UEI, please do not register the organization again. Instead, please contact the NSF IT Service Desk at 1-800-381-1532 or rgov@nsf.gov to update the organization's UEI. (Figure 2)
    - If you need help registering in the System for Award Management (SAM), go to SAM.gov.

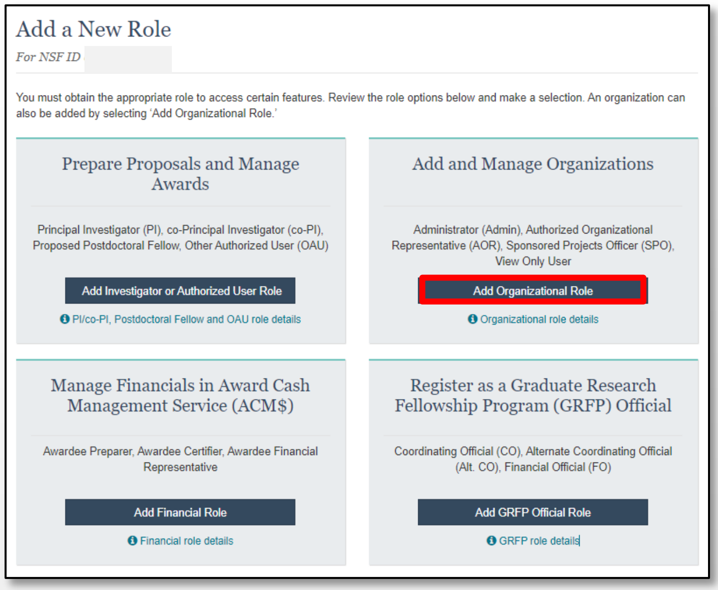


Figure 1

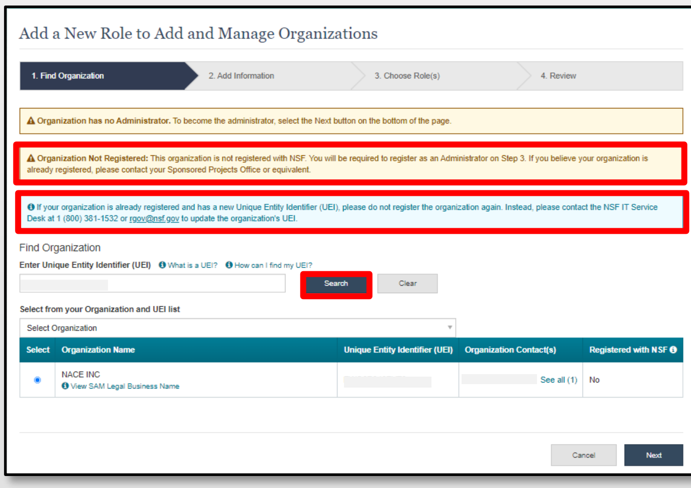


Figure 2

Helpful Tip

If a new organization is registered with NSF without an Administrator, the first user to request a role will become the organization's first Administrator.

Register a New Organization (continued)

(Continuation of steps to Register a prime awardee organization with NSF)

- Note that completion of the SAM registration process may take up to one month. Please check [SAM.gov] for information about any delays of SAM.gov registrations, validations and UEI issuance.

- Enter your contact information for the Administrator role, add your organization's information, and then click "**Next**." (Figure 3)
- Notice the "Administrator" role is pre-selected. Click "**Next**." (Figure 4)
- Review your organization's information for accuracy and click "**Submit**." (Figure 5)
- The request to register your prime awardee organization with NSF will be forwarded via email to your organization's SAM points of contact for their information only. The SAM points of contact will not need to approve the request. (Figure 6)

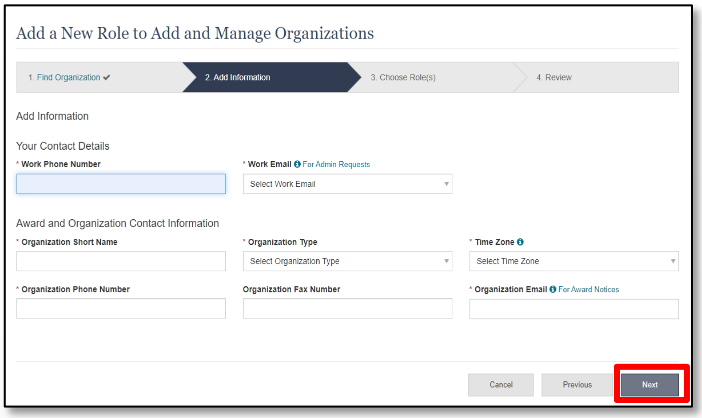


Figure 3

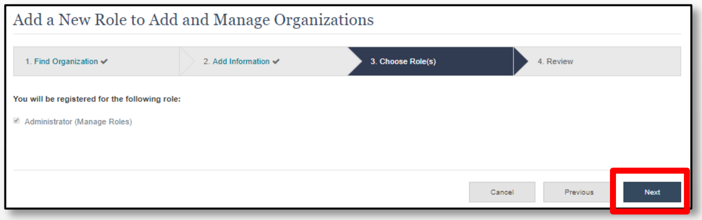


Figure 4

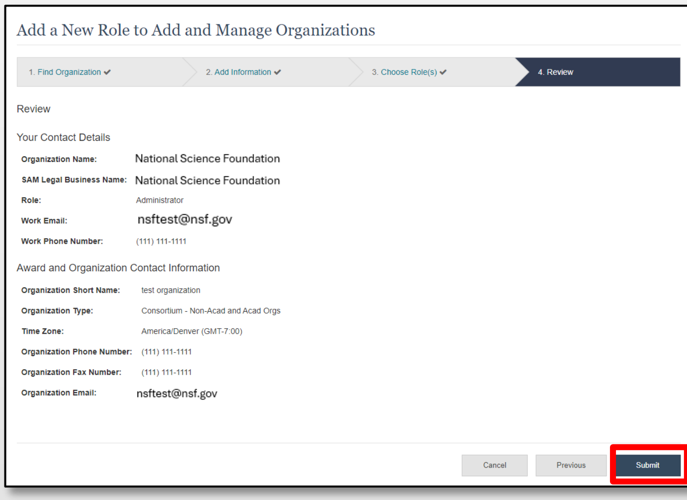


Figure 5

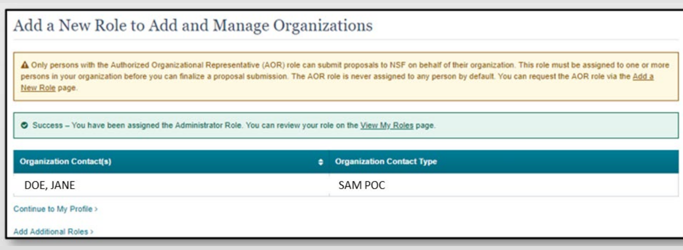


Figure 6

Helpful Tip

Once an organization is registered with NSF:

- Updates to your organization's SAM legal business name, mailing address, or EIN/TIN must be made by the organization's Administrator in SAM.gov.

How does a subrecipient organization register with NSF?

Any subrecipient named in a proposal is also required to obtain a SAM.gov-issued UEI and register the organization with NSF. Subrecipient(s) named in the proposal, however, do not need to go through the full UEI registration in SAM.gov. Refer to the *Proposal & Award Policies & Procedures Guide* (PAPPG) Chapter I.G.2. Details are as follows:

- **Step 1: Subrecipient must obtain a SAM-issued UEI:**
  - A subrecipient without a UEI must go to SAM.gov and select the green Get Started button on the "Register Your Entity or Get a Unique Entity ID" section in the upper right side of the page. Please note, the information required for obtaining a UEI is minimal (organization's legal business name and address) and will be processed relatively quickly.
- **Step 2: Subrecipient must contact the NSF IT Service Desk to register a subrecipient organization with NSF:**
  - Once the subrecipient obtains the UEI through SAM.gov, the subrecipient must contact the NSF IT Service Desk at 1-800-381-1532 (7:00 AM - 9:00 PM ET; Monday - Friday except federal holidays) to register the organization with NSF. When the subrecipient contacts the NSF IT Service Desk, inform the technician that this is a subrecipient requiring subrecipient organization registration with NSF. Please do not attempt to register the subrecipient organization with NSF in Research.gov because the system will generate an error and will not permit the subrecipient registration. To expedite the process, subrecipients should provide the following information for its subrecipient organization:
    - **Subrecipient UEI:** Required
    - **Subrecipient Organization Name:** Required
    - **Subrecipient Complete Address** (Including City, State, and Zip): Required
    - **Subrecipient Phone Number:** Optional
    - **Subrecipient POC:** Optional
    - **Email of Subrecipient Organization:** Optional
- Once these two steps are complete, the subrecipient organization may be added to a proposal with the subrecipient UEI.

Add a New Organizational Role

Account Management

Add a New Organizational Role

To work on NSF proposal and award activities in Research.gov or via Grants.gov, a user must have an organization-approved role at an organization registered with NSF. To request a role from your organization, you must sign into Research.gov using your preferred security method and select the **"My Profile"** link located on the top right of the screen. Select the **"Add a New Role"** option from the left navigation bar. After requesting a role, your organization's Administrator will receive the request electronically to approve or disapprove it.

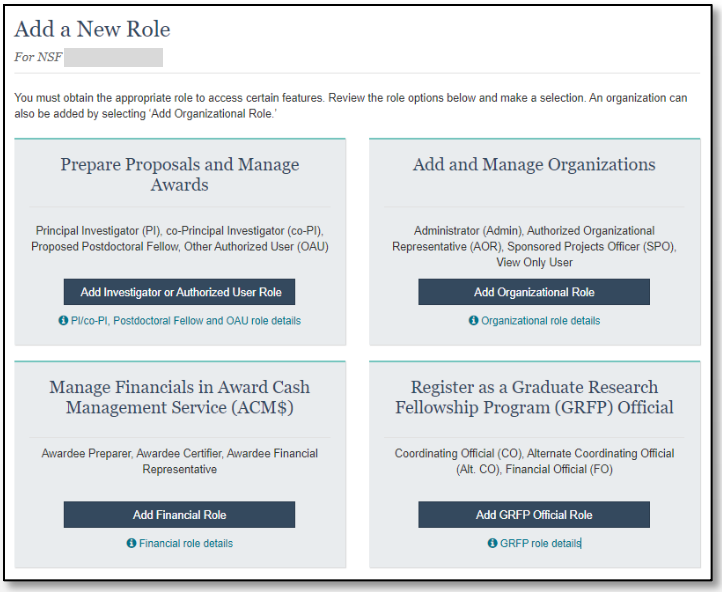


Figure 1

Figure 1 shows the four organizational role categories: Investigator, Organizational, Financial, and GRFP Official. Users should click the appropriate dark blue **Add Role** button (e.g., **Add Investigator or Authorized User Role** to request a PI role) to request the specified role and to proceed with the role wizard. Note that beneath each dark blue **Add Role** button, there is an information link (e.g., PI/co-PI, Postdoctoral Fellow and OAU role details) which provides additional information about the specific role. The table below outlines the role request options grouped by category.

If you need this organizational role(s)	To perform these functions	Select this "Add Role" Button
• **Principal Investigator (PI)** • **Co-Principal Investigator (co-PI)** • **Proposed Postdoctoral Fellow**	• Prepare proposals • Manage awards	Add Investigator or Authorized User Role
• **Administrator** • **Sponsored Projects Officer (SPO)** • **Authorized Organizational Representative (AOR)** • **View Only**	• Add a new organization • Approve/disapprove roles • Assign user roles • Add/remove users	Add Organizational Role
• **Awardee Preparer** • **Awardee Certifier** • **Awardee Financial Representative**	• Prepare and manage financials in Award Cash Management Service (ACM$)	Add Financial Role
• **Graduate Research Fellowship Program (GRFP) Coordinating Official (CO)** • **GRFP Alternate Coordinating Official (Alt. CO)** • **GRFP Financial Official (FO)**	• Manage GRFP functions	Add GRFP Official Role
• **Other Authorized User (OAU)**	• Assist a PI with proposal preparation	Add Investigator or Authorized User Role

Important Notes:

- Reviewers, GRFP Applicants, GRFP Fellows, and fellowship reference letter writers will not add an organizational role. GRFP-specific Account Management training resources including guides and FAQs are available on the GRFP Account Management page. Reviewers should follow the Provide Reviewer Profile Information job aid for detailed instructions to complete their Reviewer Profile.
- The Foreign Financial Disclosure Report (FFDR) Preparer role can only be assigned by Administrators and cannot be requested by users through the Account Management System. If you believe you should have this role and do not, please reach out to your organization's Administrator.

Role Request Wizard Steps

The four-step wizard process is the same for all organizational-approved roles. Proposed Postdoctoral Fellows follow a two-step wizard process as outlined in the [Add a New Organizational Role - Proposed Postdoctoral Fellow] job aid.

Step 1: Find Organization

- Enter your organization's Unique Entity Identifier (UEI) and click **"Search"** (Figure 2). If you already have an organization-approved role at NSF, you can use the drop-down menu to select the UEI associated with your NSF-registered organization. This step is the same whether your organization is a prime or subrecipient.
- Verify that the correct organization is displayed in the results section and click **"Next."** (Figure 2)

  Note: *For more information about System for Award Management (SAM) UEIs, go to SAM.gov. or contact your Sponsored Projects Office (SPO).*

- If your organization is not registered in SAM, go to SAM.gov. Note that completion of the SAM registration process may take up to one month. Please check SAM.gov for information about any delays of SAM.gov registrations, validations and UEI issuance.

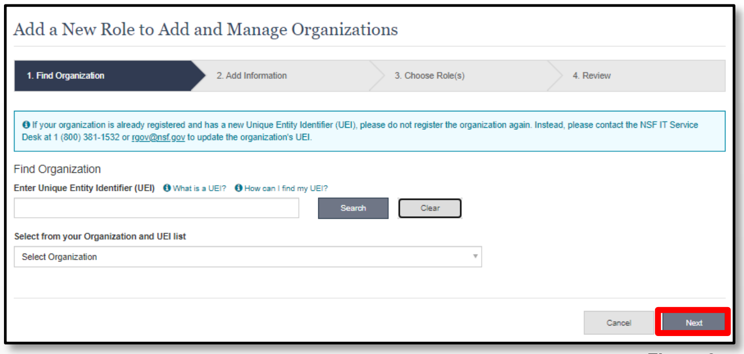


Figure 2

Step 2: Add Information

- Enter your work phone number. Use the drop-down menu to select a current work email address or add a new work email address. Then click **"Next."** (Figure 3)

  Note: *If you are requesting a Principal Investigator or Proposed Postdoctoral Fellow role, you will need to enter additional data. Please see the following job aids for detailed instructions: Add a New Organization-Approved Role – Principal Investigator or Add a New Organizational Role – Proposed Postdoctoral Fellow. If you are requesting another role at an organization where you already have a role, Step 2 of the Role Request Wizard will be pre-populated with your work phone number and email.*

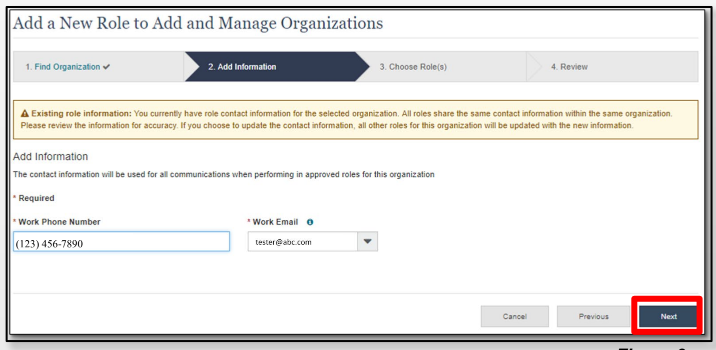


Figure 3

Helpful Tips

Each NSF account requires a primary email address and a work email address.

- Your primary email address is used for important notifications about your NSF account such as password resets. Ongoing access to an email account is required for communications and account recovery. By providing a ".edu" email address, you may lose access to this account and should provide a personal email address as your secondary email to ensure ongoing access.
- Your work email address is associated with all your roles **at a particular organization**. This email address is used for role request and approval notifications as well as for proposal and award related notifications.

Add a New Organizational Role (continued)

Step 3: Choose Organizational Role(s)

- Select a role(s) and click **"Next."** (Figure 4)

  Note: *Depending on the selected organizational role, please be aware that some corresponding organizational roles will also be automatically added. For example, if you select the Administrator role, the Sponsored Projects Officer role and the View Only role will automatically be added to your profile.*

Figure 4

Step 4: Review and Submit

- Review your information for accuracy and click **"Submit."** (Figure 5)

Figure 5

Success!

- Your role request(s) are sent to the Administrators in the Organization Contacts list for review and approval. (Figure 6)
- You have successfully submitted your organizational role request(s)!

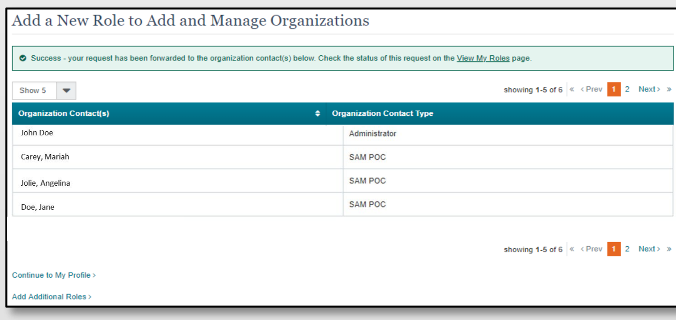


Figure 6

Helpful Tips

An email will be sent to the work email address you used to request an organizational role to inform you if your role is approved or disapproved by your organization. You should reach out to the Administrator listed as one of the organization contacts located on View My Roles page if you need to follow up on your role request.

Add a New Organization-Approved Role - Principal Investigator PI/Co-PI

Add a New Organization-Approved Role - Principal Investigator PI/Co-PI

To work on NSF proposal and award activities in Research.gov or via Grants.gov, a Principal Investigator (PI)/co-Principal Investigator (co-PI) must have an organization-approved Investigator role. After requesting a role, your organization's Administrator will receive the request electronically to approve or disapprove it. To request an organization-approved role, you must sign into Research.gov using your preferred security method and select the **"My Profile"** link located on the top right of the screen. Select the **"Add a New Role"** option from the left navigation bar.

Access the Add New a Role page

- To request an organization-approved Investigator role, click the blue "**Add Investigator or Authorized User Role"** button located in the "Prepare Proposals and Manage Awards" box. (Figure 1)
- Select **"Principal Investigator (PI) or co-Principal Investigator (co-PI)"**, click **"Submit"** (Figure 2) and a four-step role request wizard will display. (Figure 3)

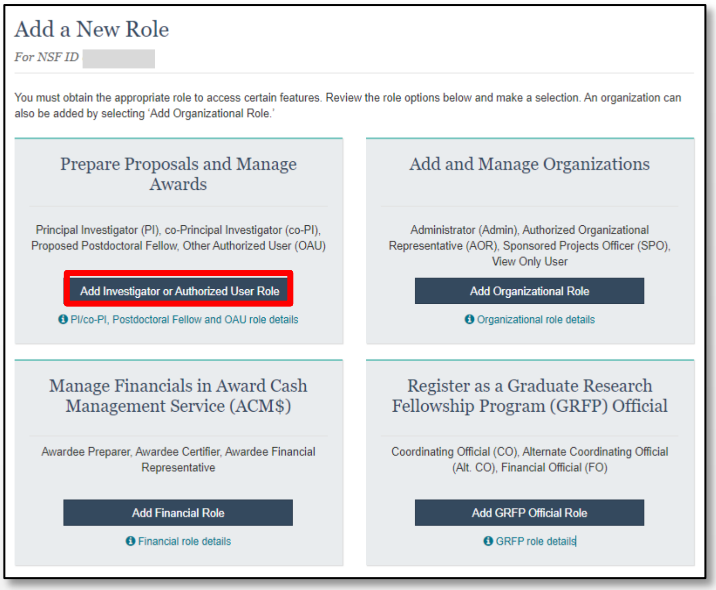


Figure 1

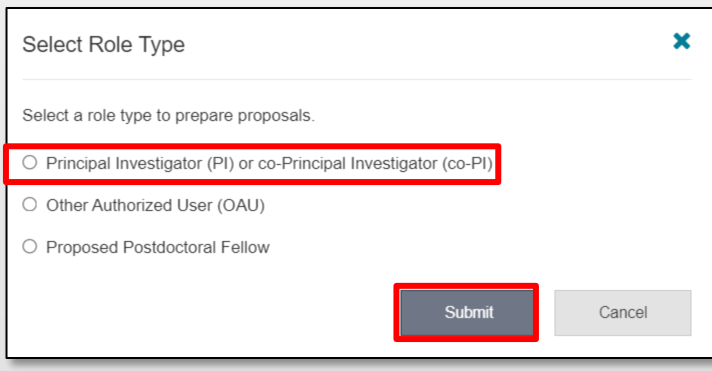


Figure 2

Four-Step Role Wizard

Step 1: Find Organization

- Enter the organization's Unique Entity Identifier (UEI) and click **"Search"** (Figure 3). If you already have an organization-approved role at NSF, select the UEI associated with your existing organization from the drop-down menu. This step is the same whether your organization is a prime or subrecipient.
- Verify that the correct organization is displayed in the results section and click "**Next**".

Note: For more information about SAM UEIs, go to SAM.gov. or contact your Sponsored Projects Office (SPO).

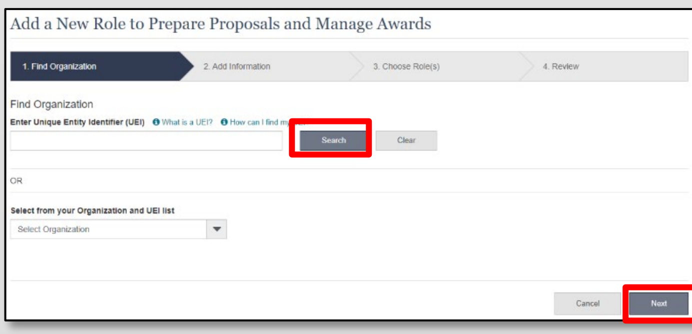


Figure 3

Step 2: Add Information

- Complete the required fields denoted by a red asterisk (*) and click “**Next.**” (Figure 4)

<u>Important Note</u>: Your demographic Information will not be shared with the listed organizational contacts while reviewing and approving your role request.

Step 3: Choose Role(s)

- The “Principal Investigator” role is pre-selected. Click **“Next.”** (Figure 5)

Step 4: Review and Submit

- Review your information for accuracy and click “**Submit.”** (Figure 6)
- If you need to update your PI role request information, select the “**Previous**” button to return to the previous screens.

Success!

- Your role request is sent to the listed Organization Contacts for review and approval. (Figure 7)
- You have successfully submitted your organizational role request!

Helpful Tips

- Your work email address is associated with all your roles at a particular organization. It is used for role request and approval notifications as well as for proposal and award related notifications.
- The Degree Information section will be pre-populated if you previously provided this information. If you update this section, the change will be reflected within the “Academic/Professional Information” tab in My Profile and for all organizations where you have an organizational Investigator role.
- The Demographic Information section will be pre-populated if you previously provided this information. If you update this section, the change will be reflected within the “Demographic Information” tab in My Profile and for all organizations where you have an organizational Investigator role.
- By default, the latest PI role will be set to primary.

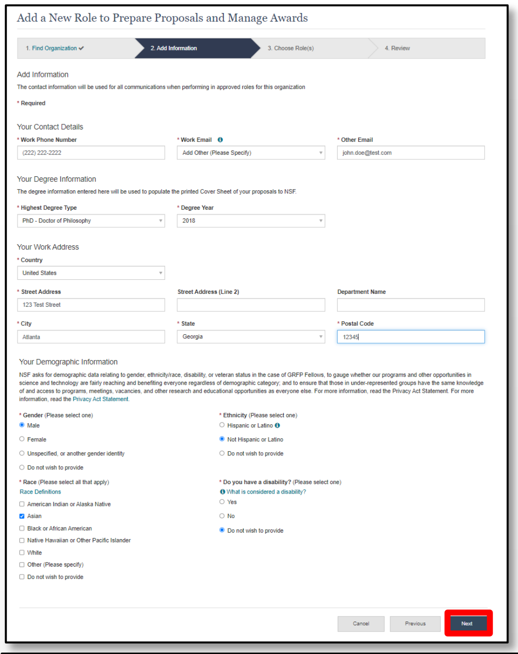


Figure 4

Figure 5

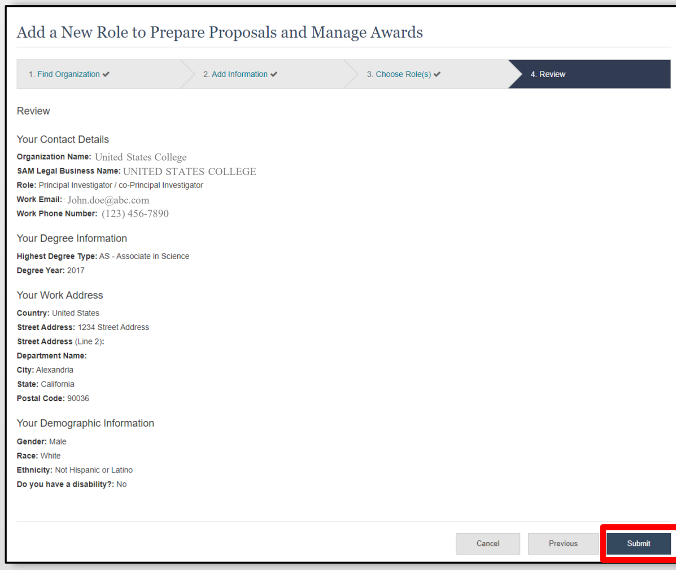


Figure 6

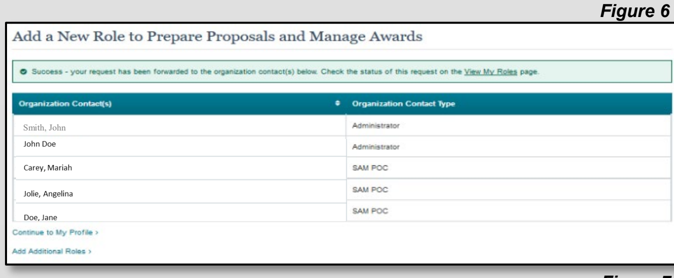


Figure 7

Add a New Organization-Approved Role - Principal Investigator PI/Co-PI (continued)

On an annual basis, PIs and co-PIs named on an active NSF award(s) made on or after May 20, 2024, are required to certify in Research.gov whether they are party to a malign foreign talent recruitment program. The certification is required to be completed once a year for the duration of all active awards.

For additional information and resources, please refer to the Malign Foreign Talent Recruitment Program annual certification section of NSF Office of the Chief of Research Security Strategy and Policy website.

Completing the Malign Foreign Talent Recruitment Program Annual Certification

- Once you have successfully signed in to Research.gov, if you are required to complete the Malign Foreign Talent Recruitment Program annual certification (Figure 8) or both the Malign Foreign Talent Recruitment Program annual certification and annual Profile Review (Figure 9), a pop-up message will display with additional details on how to proceed.
- To continue to the Malign Foreign Talent Recruitment Program annual certification page, click the **Go to Certification Form** button (Figures 8 and 9).
- Select your response to the Malign Foreign Talent Recruitment Program annual certification question and then submit it using the **Submit and Continue** button (Figure 10). After submitting, a pop-up message will display requiring you to confirm your response. (Figures 11 and 12)

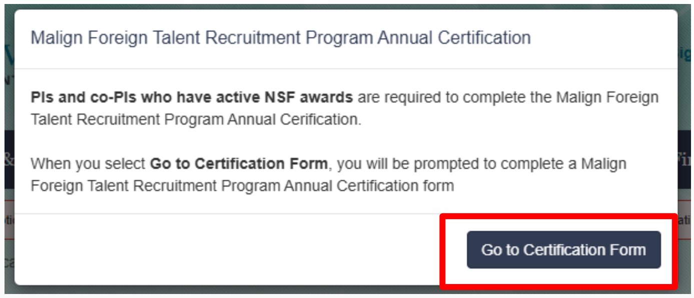


Figure 8

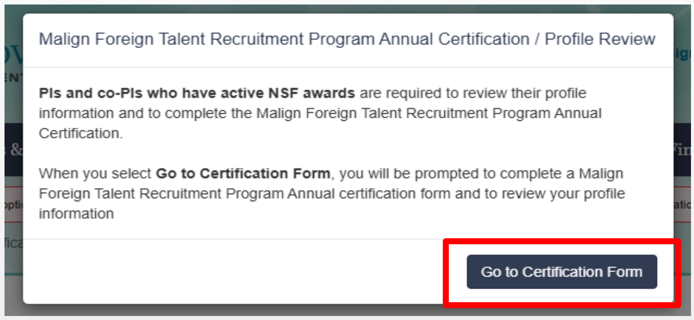


Figure 9

Figure 10

Add a New Organization-Approved Role - Principal Investigator PI/Co-PI (continued)

- To save and submit your response, click the **Confirm** button (Figure 11). After your response is successfully saved and submitted, you will be taken to either the annual Profile Review if it is required or to My Profile.
- To change your response, click the Cancel button (Figure 12). You will be taken back to the Malign Foreign Talent Recruitment Program annual certification page and have a chance to change your response and then re-submit.

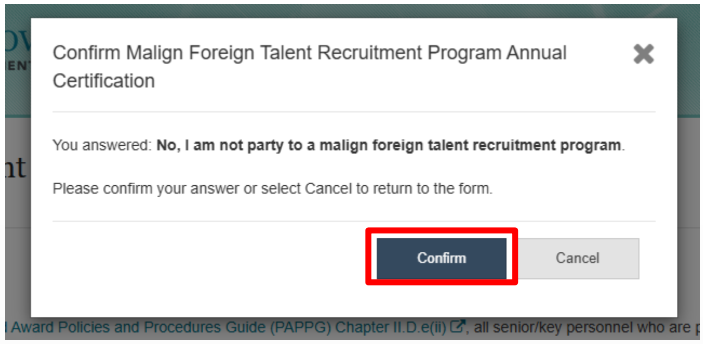


Figure 11

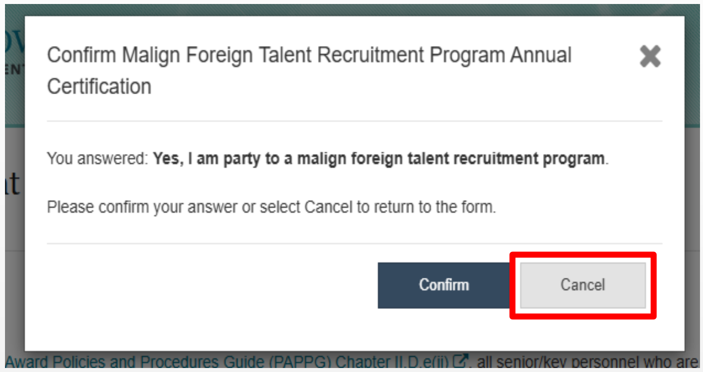


Figure 12

View Most Recent Response to Malign Foreign Talent Recruitment Program Annual Certification

- You can view your most recent response on the Academic/Professional Information tab of My Profile (Figure 13).

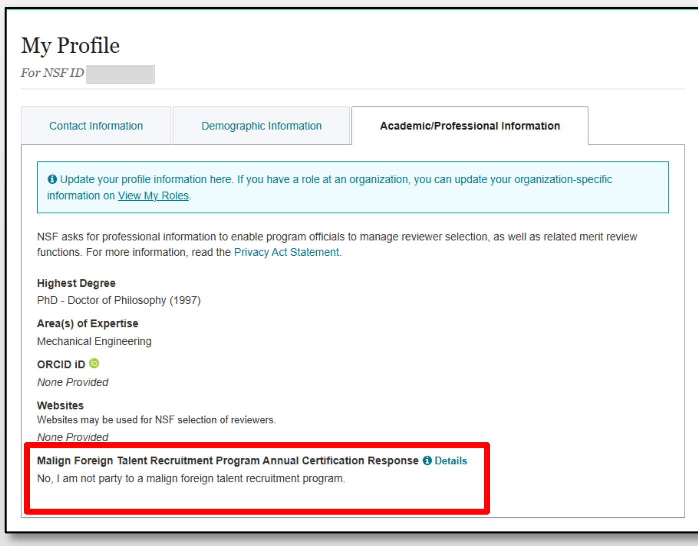


Figure 13

Important Notes:

- The Malign Foreign Recruitment Program annual certification is only required to be completed once annually regardless of how many active awards the PI or co-PI is named on.
- If the Malign Foreign Talent Recruitment Program annual certification is not required to be completed by the user, the Malign Foreign Talent Recruitment Program Annual Certification Response section will not display in My Profile.
- In Edit mode of the My Profile Academic/Professional Information tab, you are not able to update your annual certification response. If you need to update your response before your next annual certification, send an email to the NSF Office of the Chief of Research Security Strategy and Policy (researchsecurity@nsf.gov) with your request.

Add a New Organizational Role – Proposed Postdoctoral Fellow

Add a New Organizational Role – Proposed Postdoctoral Fellow

To work on NSF proposal and award activities in Research.gov or via Grants.gov, you must have an organizational Investigator role. Registering for a Proposed Postdoctoral Fellow organizational role creates an organization in Research.gov but you do not need to register the organization with NSF. You will become the Administrator of the newly created organization; however, other users cannot request organizational roles or affiliate themselves with the organization. You do not need to register the newly created organization with SAM.gov or obtain a UEI.

To request an organizational Investigator role, you must sign in to Research.gov using your preferred security method and select the **"My Profile"** link located on the top right of the screen. Then select the **"Add a New Role"** option from the left navigation bar.

Access the Add a New Role page

- To request an organizational Investigator role, click the blue "**Add Investigator or Authorized User Role"** button located in the "Prepare Proposals and Manage Awards." (Figure 1)
- Select **"Proposed Postdoctoral Fellow", click "Submit"** (Figure 2) and a two-step role request wizard will display. (Figure 3)

Two-Step Process

Step 1: Add Information

- Input data into all required fields that have a red asterisk (*)

  NOTE: *When a Proposed Postdoctoral Fellow role is created, an institution record is created as well. The time zone selected as part of your initial Proposed Postdoctoral Fellow role request will be used by NSF for proposal submission. Changing your work address will not change your time zone. To update your time zone, please contact the NSF IT Service Desk at 1-800-381-1532 or rgov@nsf.gov.*

Figure 1

Helpful Tips

- The third option in the "Select Role Type" modal box (Figure 2) is disabled if you already have an organizational Proposed Postdoctoral Fellow role. To view your current organizational Proposed Postdoctoral Fellow role information, click on "**View My Roles**" and refer to the Active Roles table.
- Your work email address is associated with all your roles at a particular organization. It is used for role request and approval notifications as well as for proposal and award related notifications.
- The Degree Information section will be pre-populated if you previously provided this information. If you update this section, the change will be reflected within the "Academic/Professional Information" tab in My Profile and for all organizations where you have an organizational Investigator role.
- The Demographic Information section will be pre-populated if you previously provided this information. If you update this section, the change will be reflected within the "Demographic Information" tab in My Profile and for all organizations where you have an organizational Investigator role.
- By default, the latest PI role will be set to primary.

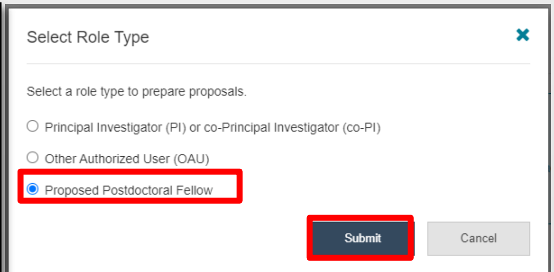


Figure 2

Add a New Organizational Role – Proposed Postdoctoral Fellow (continued)

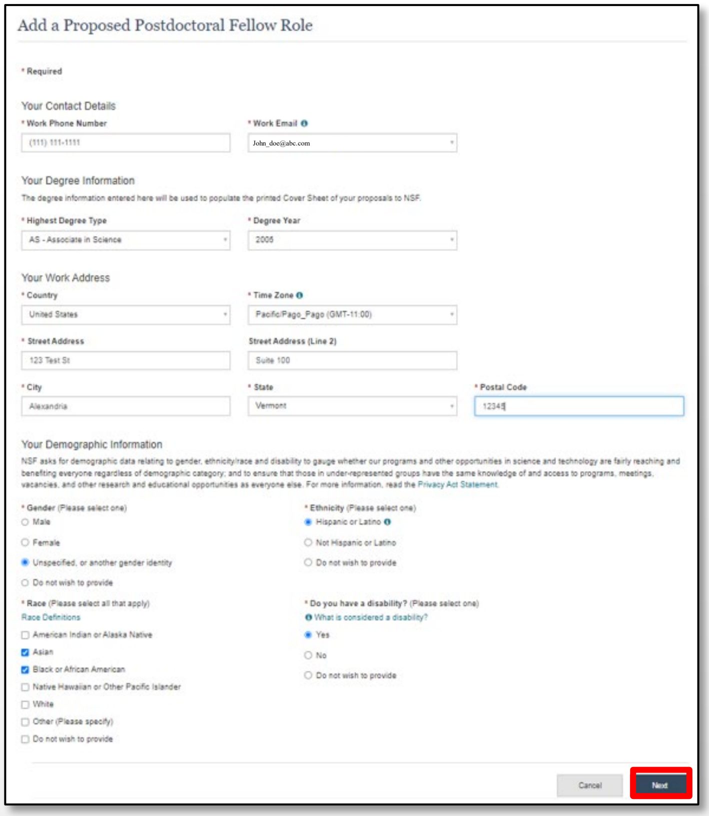


Figure 3

Step 2: Review

- Review your information for accuracy and click **"Submit."** (Figure 4)
- If you need to update your role request information, select the "**Previous**" button to return to the previous screen.

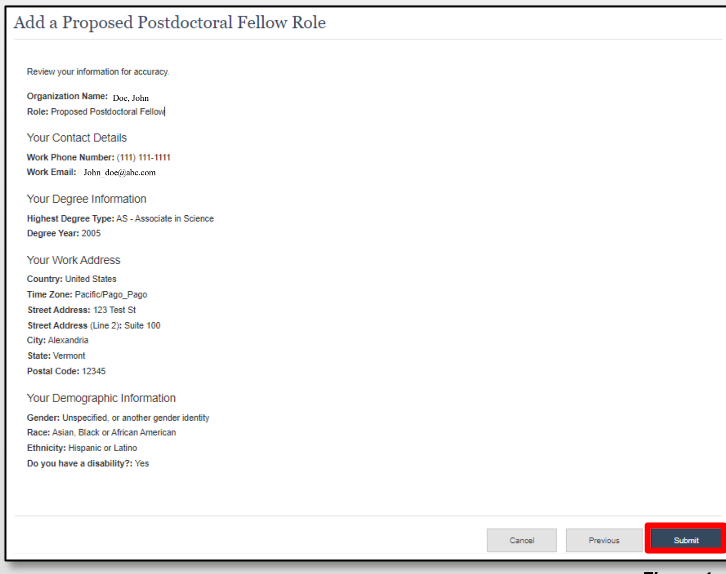


Figure 4

Step 3: Confirmation

- View the success message to confirm you have successfully added the Proposed Postdoctoral Fellow organizational role. (Figure 5)

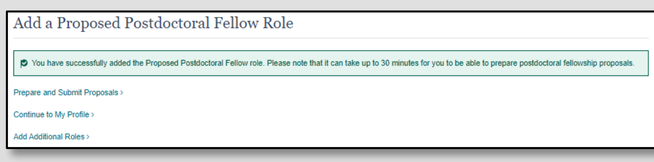


Figure 5

View My Organizational Roles – Requested Role(s)

Account Management

View My Organizational Roles – Requested Role(s)

The View My Roles page shows the roles you have requested which are pending approval or disapproval from your organization's Administrator as well as your existing approved roles. You may view organization contact(s) and edit your organization contact information by following the step-by-step process below.

Individuals who are reviewers will also see reviewer/meeting participant information including reviewer organizational affiliations displayed on this page. Please see the [View My Reviewer/Meeting Participant Information]() job aid for additional reviewer information.

Access the View My Roles page

- Open [Research.gov]()
- Click **"Sign In"** located at the top right of the screen.
- Click **"Sign In Using NSF Credentials"**, enter your credentials (e.g., NSF ID and password) and sign in using your selected security method (i.e., multifactor authentication method). If you have not set up your preferred security method yet, you will be prompted to complete this activity to access your account. *For more information on setting up your preferred security method including how-to guides, video tutorials, and FAQs, visit the [About Signing Into Research.gov]() page.*
- Once you've successfully signed in using your preferred security method, click **"My Profile"** located at the top right of the screen.
- Click **"View My Roles"** from the left navigation bar.
- Your pending role requests are displayed within the "Requested Role(s)" table.

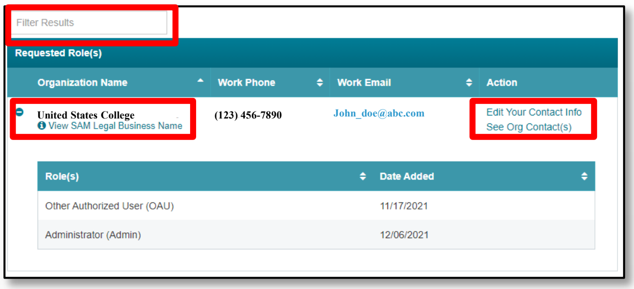


Figure 1

How do I change organization contact information for a PI or co-PI role?

- Locate the organization and click **"Edit Your Contact Info"** in the "Action" column located on the right side of Requested Role(s) table. (Figure 1)
- <u>Users who have a PI or co-PI role</u> will see the screen depicted in Figure 2 and can edit their contact details, degree information, and work address. Then click **"Save."**
- Time zone and proposal deadlines are determined by the submitting organization's time zone and not your individual working location. Changing your work address will not change your time zone. To update your time zone, please contact the NSF IT Service Desk at 1-800-381-1532 or [rgov@nsf.gov](). For general guidance on proposal preparation and submission, see the NSF *[Proposal & Award Policies & Procedures Guide]().*

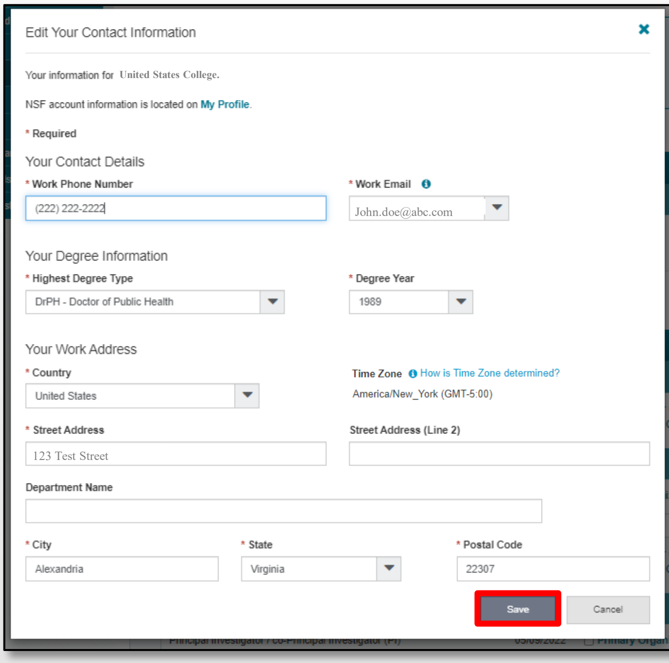


Figure 2

Helpful Tips

- The Requested Role(s) table depicted in Figure 1 can be filtered, sorted, and expanded:
  - Filter on any information contained in the table by typing into the Filter Results box in the upper left corner.
  - Sort data in ascending or descending order by clicking the arrows located next to the column names.
  - Expand and collapse the organization name to display and hide roles.

View My Organizational Roles - Requested Role(s) (continued)

How do I change organization contact information if I have an organizational role other than PI or co-PI?

Locate the organization and click **"Edit Your Contact Info"** in the "Action" column located on the right side of Requested Role table. (Figure 1 on previous page)

- Users with organizational roles other than PI or co-PI roles will see the screen depicted in Figure 3 and can edit their work phone number and work email address. Then click **"Save."**

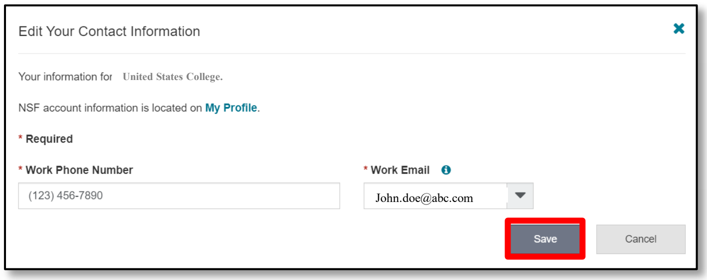


Figure 3

Who do I contact at my organization for role request questions?

- Locate the organization and click **"See Org Contact(s)"** in the "Action" column located on the right side of Requested Role table. (Figure 1 on previous page)
- The Organization Contacts modal box will appear. (Figure 4)

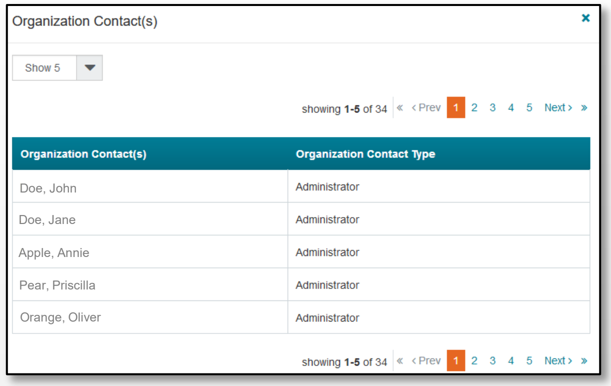


Figure 4

Helpful Tips

- Each NSF account requires a primary email address and a work email address. (Figure 2 on previous page & Figure 3)
  - Your primary email address is used for important notifications about your NSF account such as password resets. Ongoing access to an email account is required for communications and account recovery. By providing a ".edu" email address, you may lose access to this account and should provide a personal email address as your secondary email to ensure ongoing access.
  - Your work email address is associated with all your roles **at a particular organization**. This email address is used for role request and approval notifications as well as for proposal and award related notifications.

View My Organizational Roles – Active Role(s)

View My Organizational Roles – Active Role(s)

The View My Roles page shows your existing approved roles. You may view organization contact(s) and edit your organization contact information by following the step-by-step process below. You may set your Primary Organization designation if you have a PI/co-PI role at an organization or you are a Proposed Postdoctoral Fellow.

Individuals who are reviewers will also see reviewer/meeting participant information including reviewer organizational affiliations displayed on this page. Please see the View My Reviewer/Meeting Participant Information job aid for additional reviewer information.

Access the View My Roles page

- Open Research.gov
- Click **"Sign In"** located at the top right of the screen.
- Click **"Sign In Using NSF Credentials"**, enter your credentials (e.g., NSF ID and password) and sign in using your selected security method (i.e., multifactor authentication method). If you have not set up your preferred security method yet, you will be prompted to complete this activity to access your account. *For more information on setting up your preferred security method, including how-to guides, video tutorials, and FAQs, visit the About Signing Into Research.gov page.*
- Once you've successfully signed in using your preferred security method, click **"My Profile"** located at the top right of the screen.
- Click **"View My Roles"** from the left navigation bar.
- Your existing approved roles are displayed within the "Active Role(s)" table.

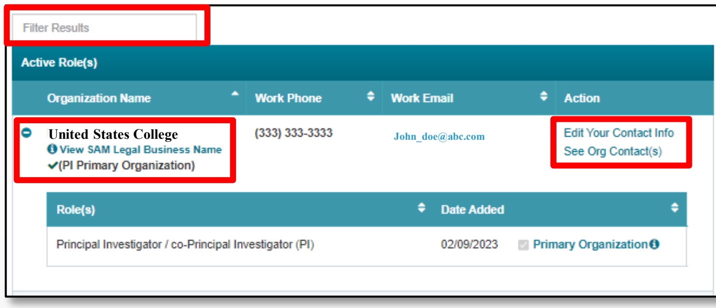


Figure 1

How do I change organization contact information for a PI or co-PI role?

- Locate the organization and click **"Edit"** in the "Action" column located on the right side of Active Role(s) table. (Figure 1)
- Users who have a PI or co-PI role will see the screen depicted in Figure 2 and can edit their contact details, degree information, and work address. Then click **"Save."**
- Time zone and proposal deadlines are determined by the submitting organization's time zone, not your individual working location. Changing your work address will not change your time zone. To update your time zone, please contact the NSF IT Service Desk at 1-800-381-1532 or rgov@nsf.gov. For general guidance on proposal preparation and submission, see the NSF *Proposal & Award Policies & Procedures Guide*.

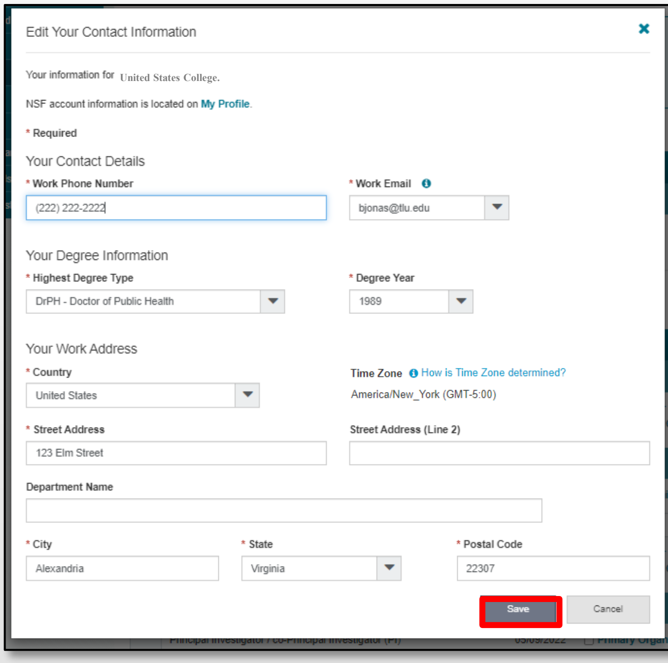


Figure 2

Helpful Tips

- The Active Role(s) table depicted in Figure 1 can be filtered, sorted, and expanded:
  - Filter on any information contained in the table by typing into the Filter Results box in the upper left corner.
  - Sort data in ascending or descending order by clicking the arrows located next to the column names.
  - Expand and collapse the organization name to display and hide roles.

View My Organizational Roles – Active Role(s) (continued)

How do I change organization contact information for a Proposed Postdoctoral Fellow role?

- Locate the organization and click **"Edit Your Contact Info"** in the "Action" column located on the right side of Requested Role table. (Figure 1 on previous page)
- Users who have a Proposed Postdoctoral Fellow role will see the screen depicted in Figure 3 and can edit their contact details, degree information, and work address. Then click **"Save"**.
- Time zone is determined by the time zone you selected during your initial role request. Changing your work address will not change your time zone. To update your time zone, please contact the NSF IT Service Desk at 1-800-381-1532 or rgov@nsf.gov. For general guidance on proposal preparation and submission, see the NSF *Proposal & Award Policies & Procedures Guide*.

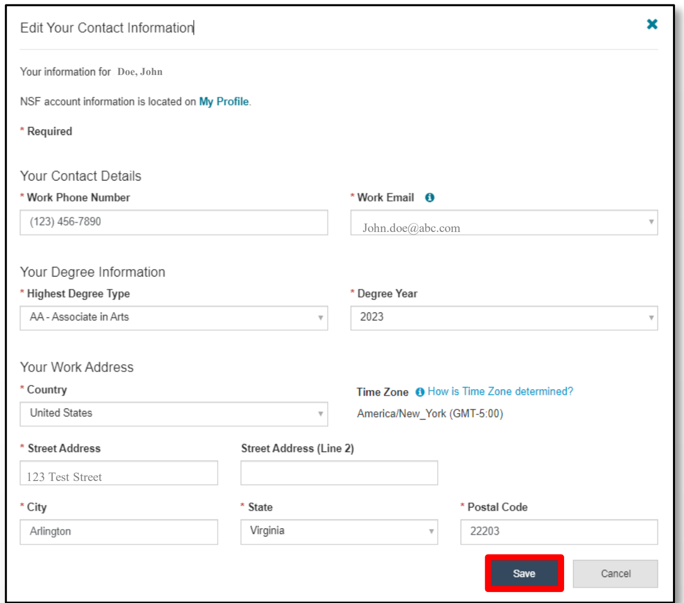


Figure 3

How do I change organization contact information for all other roles?

- Locate the organization and click **"Edit Your Contact Info"** in the "Action" column located on the right side of Requested Role table. (Figure 1 on previous page)
- Users who have roles other than PI, co-PI or Proposed Postdoctoral Fellow roles will see the screen depicted in Figure 4 and can edit their work phone number and work email address. Then click **"Save."**

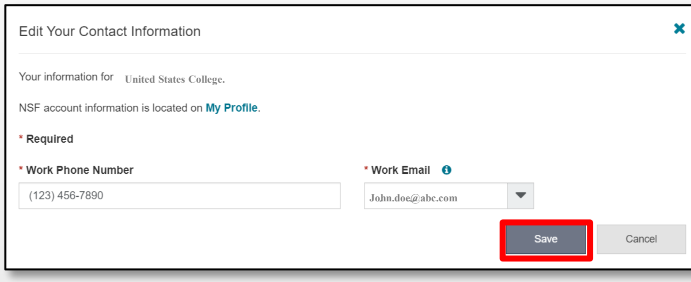


Figure 4

Who do I contact at my organization for role request questions?

- Locate the organization and click **"See Org Contact(s)"** in the "Action" column located on the right side of Requested Role table. (Figure 1 on previous page)
- The Organization Contacts modal box will appear. (Figure 5)

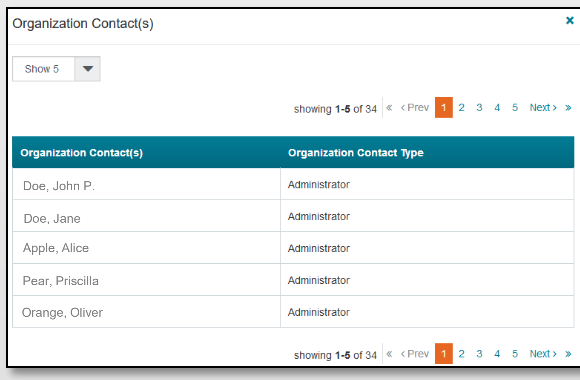


Figure 5

Helpful Tips

- Each NSF account requires a primary email address and a work email address. (Figure 2 on previous page and Figure 3)
  - For Primary email, Ongoing access to an email account is required for communications and account recovery. By providing a ".edu" email address, you may lose access to this account and should provide a personal email address as your secondary email to ensure ongoing access.
  - Your work email address is associated with all your roles **at a particular organization**. This email address is used for role request and approval notifications as well as for proposal and award related notifications.

View My Organizational Roles – Active Role(s) (continued)

How do I set an organization as my primary organization for proposal submissions?

- **Prerequisite**: You must have either an organization-approved Principal Investigator (PI) role or a Proposed Postdoctoral Fellow role before you can designate a primary organization.
    - If you don't have an organization-approved Principal Investigator role and would like to request one, refer to the Add a New Organization-Approved Role - Principal Investigator PI/co-PI job aid.
    - If you don't have a Proposal Postdoctoral Fellow role and would like to request one, refer to the Add a New Organizational Role – Proposed Postdoctoral Fellow job aid.
- Open the "**View My Roles**" page and locate the Active Role(s) table. (Figure 6)
- Locate the organization where you have an approved PI role that you would like to set as your primary organization. (Figure 6)
- If your roles at the organization are not already expanded, click on the plus sign next to the organization name to expand the row. (Figure 6)
- Locate the Principal Investigator role. (Figure 6)
- Select the "**Primary Organization**" check box located to the right of the Date Added field. (Figure 6)
- Notice the green check mark and "PI Primary Organization" label under the organization name. (Figure 6)
- By default, the organization associated with the latest PI role added to your profile (including a Proposed Postdoctoral Fellow role) will become the primary organization.

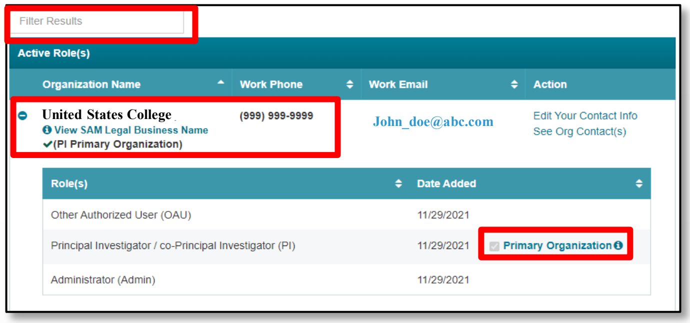


Figure 6

Helpful Tips

- You can only have one primary organization.
- Only PIs need to select a primary organization.
- By default, the organization associated with the latest PI role added to your profile (including a Proposed Postdoctoral Fellow role) will become the primary organization.

View My Organizational Roles – Active Role(s) (continued)

How does an Authorized Organizational Representative (AOR) update the organization's information maintained in NSF systems such as the organization's email address, award notice email address, and phone number?

- **Prerequisite**: You must have an organization-approved AOR role before you can update your organization's information.
    - If you don't have an organization-approved AOR role and would like to request one, refer to the Add a New Organizational Role job aid.
- Open the "**View My Roles**" page and locate the Active Role(s) table. (Figure 7)
- Locate the organization where you have an approved AOR role that you would like to update. (Figure 7)
- Select the **"Edit Organization Info"** link in the Action column. (Figure 7)
- The "Edit Organization Information" page will display. (Figure 8)
- Edit your organization's information, as needed, and click **"Save"** once done. (Figure 8)
    - The "Award Notice Email Address" will only display for those Organizations that have been awarded.
- A success message will be displayed and an email will be sent out to all AORs at your organization informing them of the change.

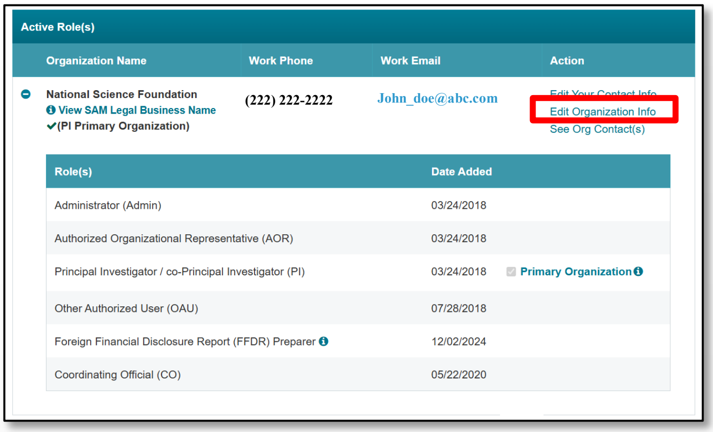


Figure 7

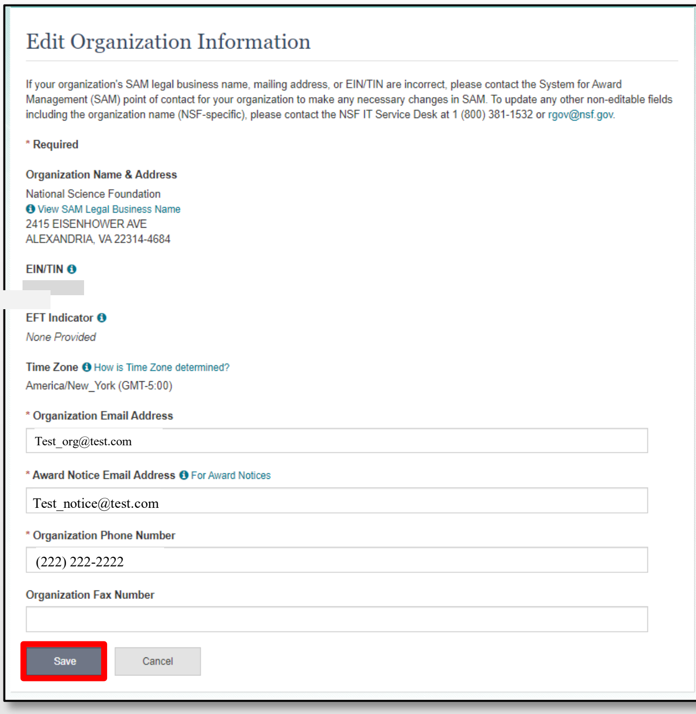


Figure 8

View My Users – Administrator Dashboard

Account Management

View My Users – Administrator Dashboard

The View My Users page enables Administrators to view an organization's pending role requests and manage user roles. Via this dashboard, the Administrator can approve or disapprove role requests, add or remove current user roles, and add current NSF users to the organization. Reviewers are not included on the View My Users page dashboard even if they have an organizational affiliation to the organization. Only individuals with organization-approved roles are included on the View My Users page dashboard.

Access the View My Users page

- Open Research.gov
- Click **"Sign In"** located at the top right of the screen.
- Click **"Sign In Using NSF Credentials"**, enter your credentials (e.g., NSF ID and password) and sign in using your selected security method (i.e., multifactor authentication method). If you have not set up your preferred security method yet, you will be prompted to complete this activity to access your account. *For more information on setting up your preferred security method, including how-to guides, video tutorials, and FAQs, visit the About Signing Into Research.gov page.*
- Once you've successfully signed in using your preferred security method, click **"My Profile"** located at the top right of the screen.
- Click **"View My Users"** from the left navigation bar.

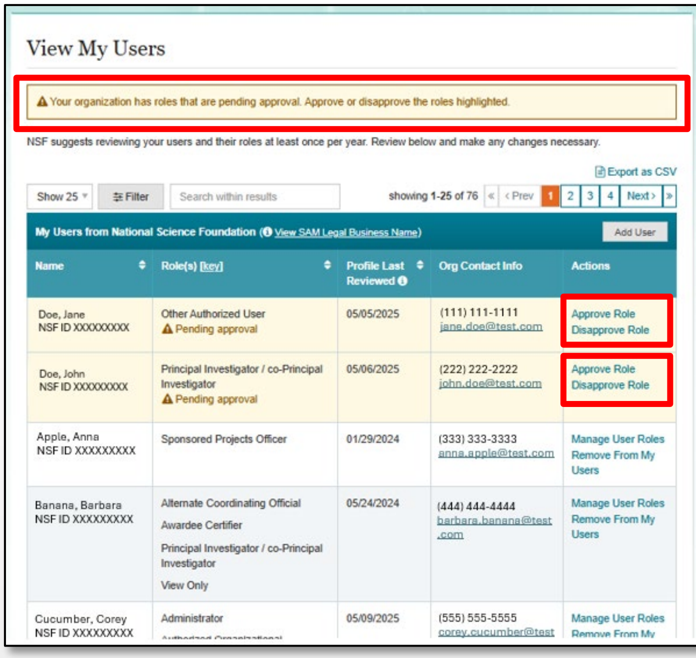


Figure 1

How do I approve or disapprove a role request from a user?

- All users with pending & approved user roles for your organization will display within the "My Users" table (Figure 1).
- If you have pending user role requests, a warning message will display on the top of the page and these roles will be highlighted at the top of the table in yellow with "Pending approval" text (Figure 1 & 2). If you are an Admin at more than one organization, select the corresponding organization with the pending user role requests from the "Showing Users from" drop-down. (Figure 2)
- If the organization has pending user role requests, these roles will be highlighted at the top of the table in yellow with "Pending approval" text. (Figure 1 & 2)
- For each user role request, click "Approve Role" to accept a user's request or "Disapprove Role" to reject a user's request. (Figure 1 & 2)
- Approved role requests will appear in "My Users" table and the rejected role requests will be removed. (Figure 1 & 2)

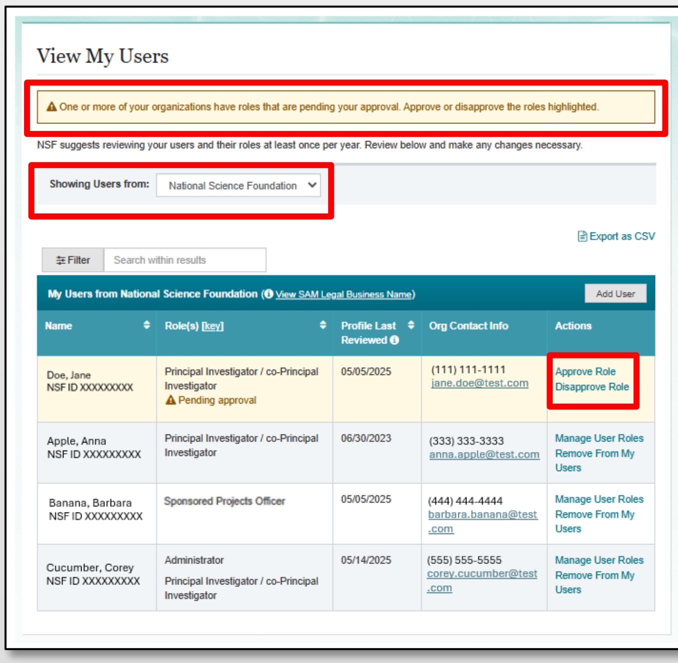


Figure 2

How do I add or remove user roles?

- Select the **“Manage User Roles”** link for the corresponding user that you would like to add or remove user roles from within the “My Users” table. (Figure 3)
- Select the appropriate role(s) to assign or remove from the user. (Figure 4)
    - ***Caution:*** Deselecting all roles for a user will remove the user from the organization. (Figure 4)
    - If another user has the GRFP Coordinating Official (CO) role, the system will display the current CO’s name. (Figure 4)

      Note: There can only be one GRFP CO at an organization, and a CO cannot be removed from the organization unless the role is reassigned to another user.
    - As of May 20, 2024, the Foreign Financial Disclosure Report (FFDR) Preparer role is also assigned by default to a user when a requested AOR role is approved by the Administrator. Uncheck Foreign Financial Disclosure Report (FFDR) Preparer if the user should not also have the FFDR Preparer role and/or you would prefer to assign the FFDR Preparer role to someone else within the organization. (Figure 4)
- Click **“Save.”** (Figure 4)
- If a user has not entered the required Principal Investigator degree information, work email, and work phone number for the specified organization, a “Pending Assignee Action" icon will be displayed next to their name and PI role on the user's View My Roles page and also on the Administrator’s View My Users page. (Figure 5) The user assigned this role must input and save the required information by clicking on the “Edit Your Contact Info” link located in the Active Roles table on the View My Roles page.

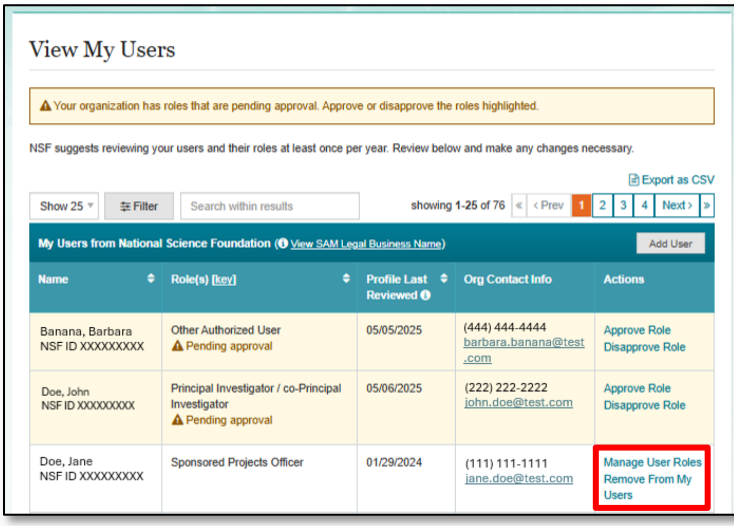


Figure 3

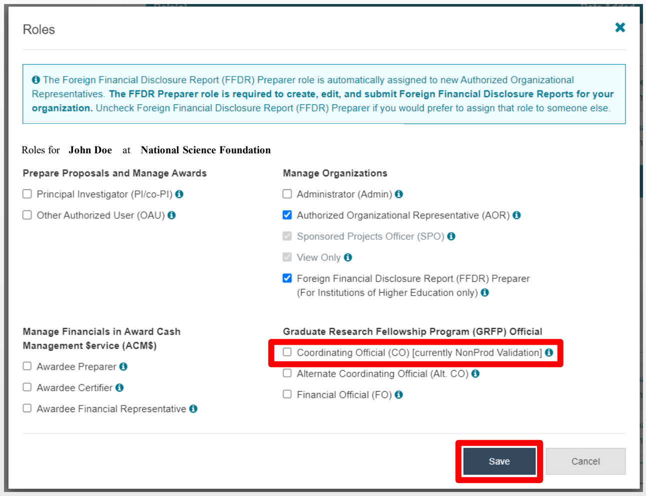


Figure 4

How do I remove a user from my organization?

- Select the “**Remove From My Users**“ link located in the Action column for the user that you would like removed from your organization. (Figure 3) A user cannot be removed if they are the last or sole Administrator.
    - A user cannot be removed if they are the current GRFP Coordinating Official (CO). This CO role must be assigned to another user before removing the user.
    - Successfully removing the user will remove the user from the organization but not from NSF systems.
    - Removing a user from the organization does not in any way impact the user’s NSF account or that user’s ability to become affiliated with any other organization.
- Click “**Remove User**.” (Figure 6)

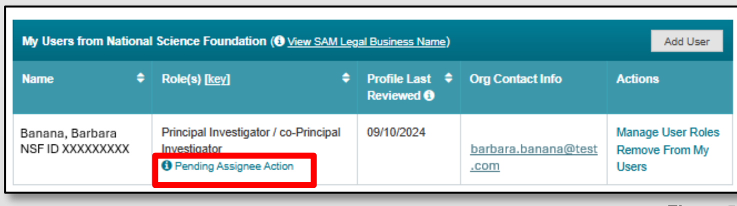


Figure 5

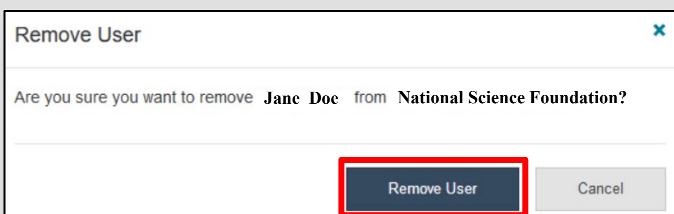


Figure 6

View My Users – Administrator Dashboard (continued)

How do I add an existing NSF user as a new user at my organization?

- Click "**Add User**" within the **"My Users"** table. (Figure 7)
- Enter an NSF ID or primary, secondary, or work email address and click "**Search.**" (Figure 8)
- Ensure the intended user's name appears.
- If you are an Administrator for multiple organizations, select an organization from the drop-down menu. (Figure 9)
- Click "**Continue.**" (Figure 9)
- Select the appropriate role(s) to assign to the user

  Note: If the user already has pre-selected roles, this means the user has already been added to your organization. In this case, you may edit the user's roles and click "**Add User**." (Figure 10)

  - ***Caution:*** Deselecting all roles for a particular user will remove the user from the organization. (Figure 10)
  - If another user has the GRFP Coordinating Official (CO) role, the system will display that current CO's name. (Figure 10)
  - As of May 20, 2024, the Foreign Financial Disclosure Report (FFDR) Preparer role is also assigned by default to a user when a requested AOR role is approved by the Administrator. Uncheck Foreign Financial Disclosure Report (FFDR) Preparer if the user should not also have the FFDR Preparer role and/or you would prefer to assign the FFDR Preparer role to someone else within the organization. (Figure 11)
- Click "**Add User.**" (Figures 10 and 11)

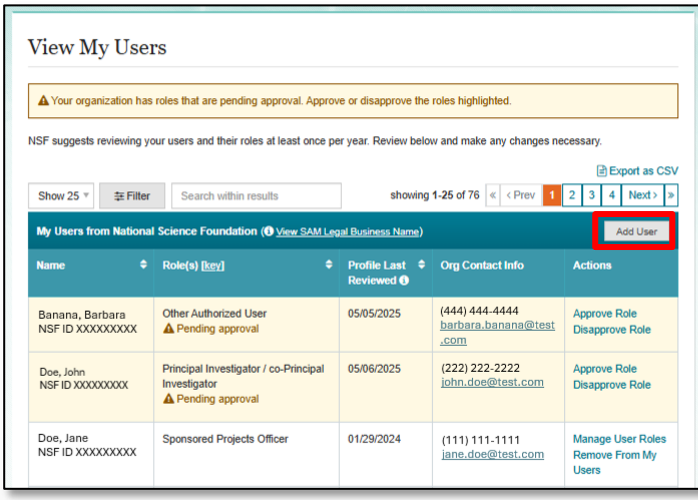


Figure 7

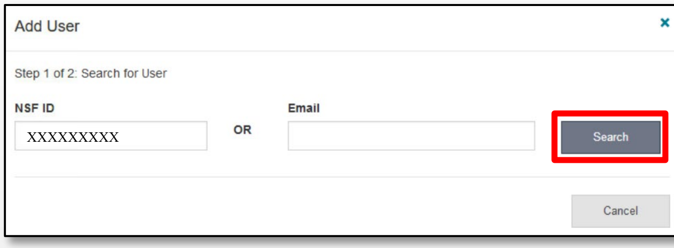


Figure 8

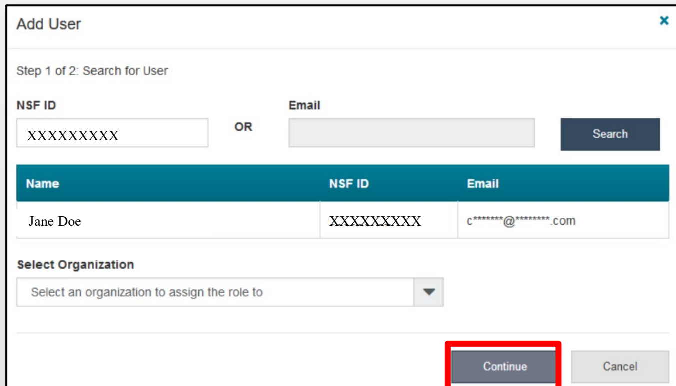


Figure 9

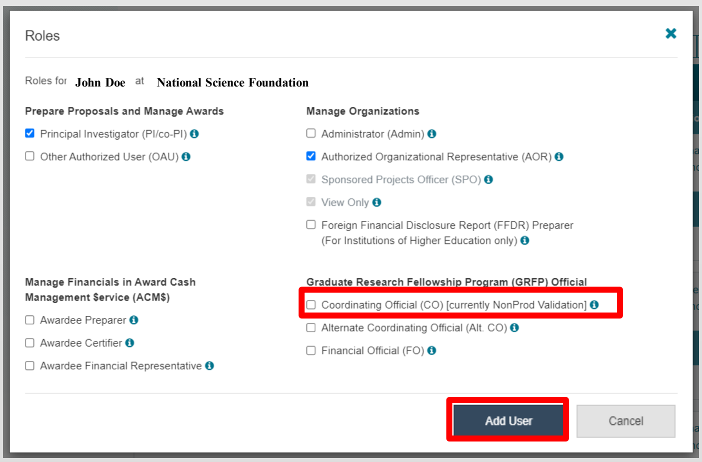


Figure 10

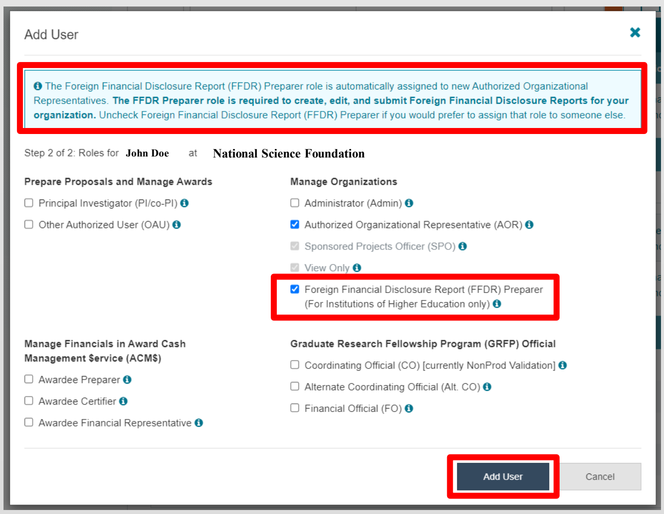


Figure 11

View My Users – Administrator Dashboard (continued)

(Continuation of steps to add an existing NSF user as a new user at my organization)

- If a user has not entered the required Principal Investigator degree information, work email, and work phone number for the specified organization, a “Pending Assignee Action" icon will be displayed next to their name and PI role on the user's View My Roles page and also on the Administrator’s View My Users page. (Figure 12) The user assigned this role must input and save the required information by clicking on the “Edit Your Contact Info” link located in the Active Roles table on the View My Roles page.

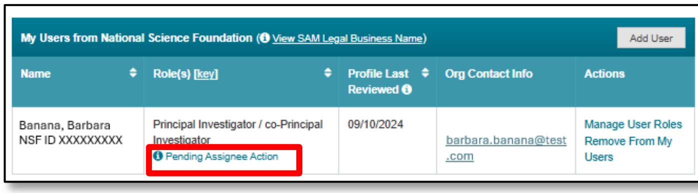


Figure 12

How do I invite a staff member at my organization who does not have an NSF account to register for an NSF account so that I may add them as a user on my organization’s dashboard?

- Click “**Add User**” within the “My Users” table. (Figure 13)
- Click “**Add User**.” (Figure 13)
- Enter an email address and click “**Search.”** (Figure 14)
- Ensure the correct email address appears. (Figure 14)
    - If you’re an Administrator at multiple organizations, select an organization to invite the user. (Figure 14)
- Click “**Invite to Register**.” (Figure 14)
- An email will be sent to the user inviting them to register for an NSF account in Research.gov.

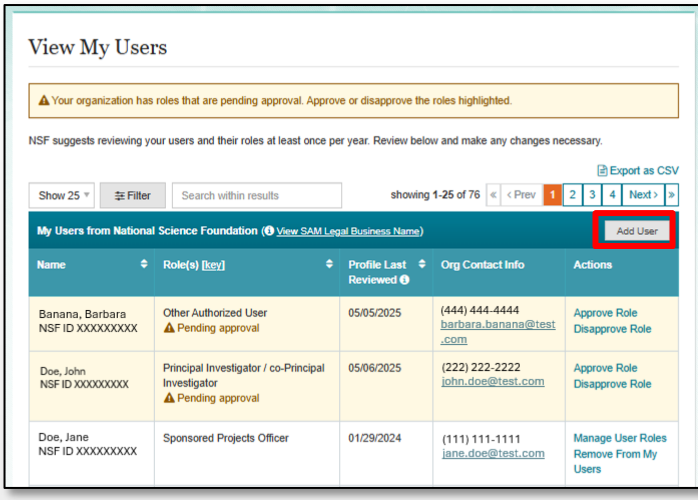


Figure 13

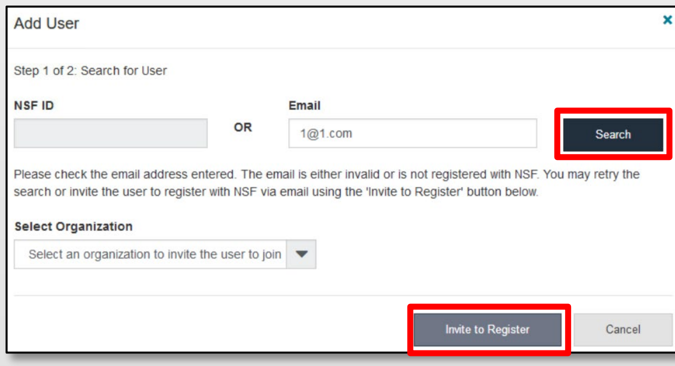


Figure 14

View My Users – Administrator Dashboard (continued)

How do I export a list of users with an approved role at my organization?

- If you are an Admin at more than one organization, select the corresponding organization that you would like to export the list of users from the “Showing Users from” drop-down. (Figure 15)
- Select the **“Export as CSV”** link that is displayed above the “My Users” table. (Figure 15)
- An “Export as CSV” message will display. Review the Acceptable Use Disclaimer text and click the “Export as CSV” button. (Figure 16)
- A CSV file will begin downloading. Once complete, this file will contain all the users with an approved role for the specified organization.
    - ***Note:*** Only those users with the assigned Administrator role for the corresponding organization are authorized to access this information.

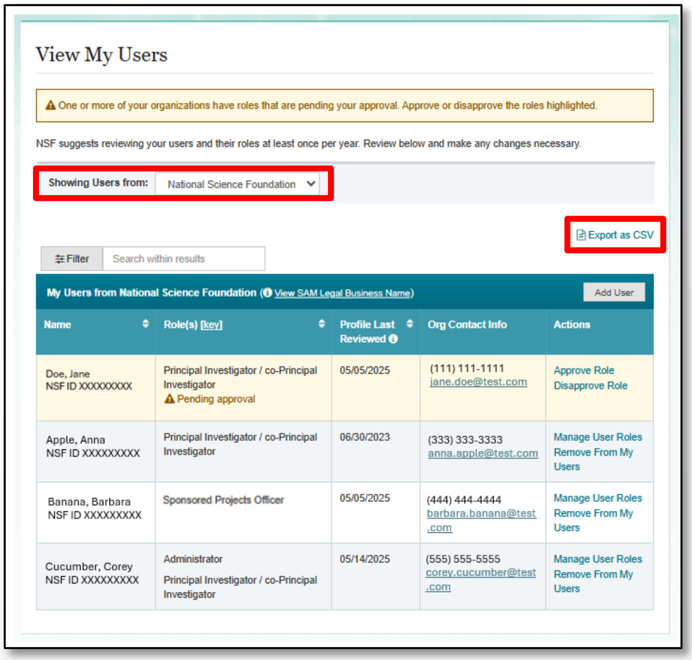


Figure 15

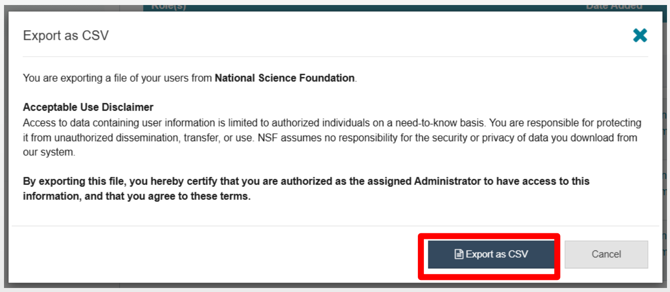


Figure 16

How can I more easily view users at my organization?

In addition to allowing the list of users with an approved role at an organization to be exported to a CSV file, you may use the following additional features to more easily view users at your organization on the “View My Users” page:

- By default, the “My Users” table will automatically show the first 25 users within your organization. Use the “Show 25” drop-down to update the number of users displayed. If you would like to see all users for your organization, select the “Show All” option from the drop-down. (Figure 17)
- The “Filter” icon can be used to filter by role(s). By default, the table will display all roles; however, you can modify the display using the corresponding checkboxes and clicking “Apply Filters” (Figure 18).
- The “Search within results” input field can also be used to further refine the search results by name, NSF ID, role or work contact info. (Figure 17)
- If you would like to sort by a specific column (e.g., Profile Last Review), click on the corresponding column. (Figure 17)

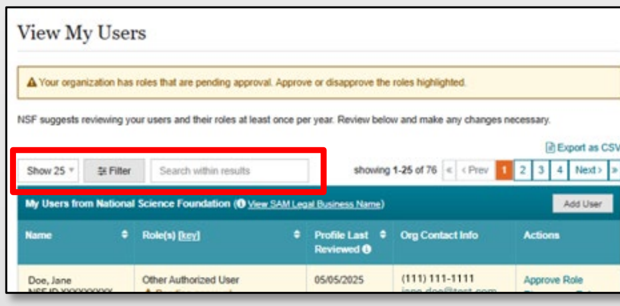


Figure 17

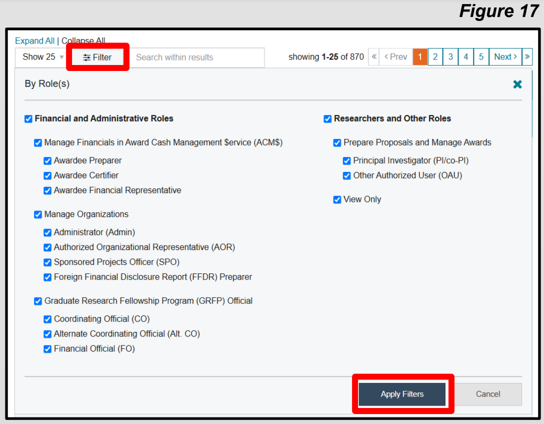


Figure 18

Migrate Your Existing NSF Account

Migrate Your Existing NSF Account

To migrate your existing NSF account created in FastLane to NSF's Account Management System in Research.gov, you must verify your account's primary email address and phone number. If you created your NSF account before March 2018 and your email address is associated with more than one NSF account, you will be prompted to verify information. Depending on the information on file, you may be required to contact the NSF IT Service Desk for assistance.

How will the system prompt me to verify my information so that my account can be migrated?

- Open Research.gov
- Click **"Sign In"** located at the top right of the screen. (Figure 1)
- Click **"Continue to Research.gov Sign In Options"**, enter your credentials (e.g., NSF ID and password) and sign in using your selected security method (i.e., multifactor authentication method) (Figure 2). If you have not set up your preferred security method yet, you will be prompted to complete this activity to access your account. *For more information on setting up your preferred security method including how-to guides, video tutorials, and FAQs, visit the About Signing Into Research.gov page.*
- Once you've successfully signed in using your preferred security method, you will receive a Verify Your Information pop-up message. After you have read it, click "**Next**." (Figure 3)
- Select an email address, enter your 10-digit phone number and click "**Next**." (Figure 4)
- Note the information that has been saved as your account's primary email address and phone number. (Figure 5)
- Click "**Add a New Role**" and you will be directed to the Add a New Role page. (Figure 5)
- To add an organization-approved role from a new organization or to add the Proposed Postdoctoral Fellow role, see Add a New Organizational Role.

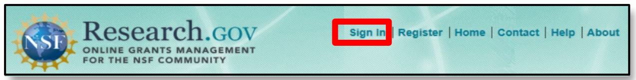


Figure 1

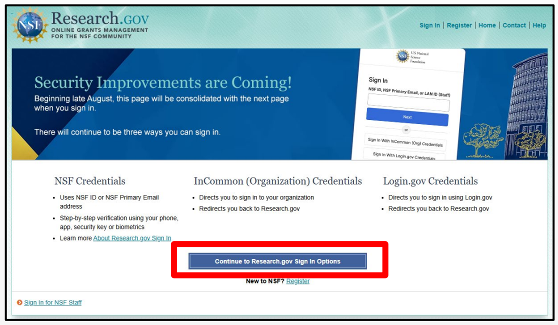


Figure 2

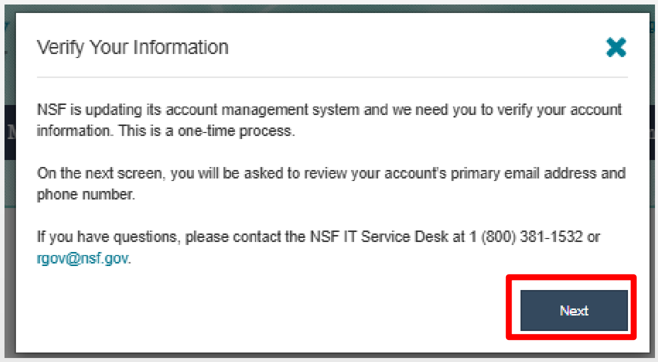


Figure 3

Note:

- *Upon completing the verification process, you will see a green success message at the top of the screen. To update your Contact and Academic/Professional Information, click the* ***My Profile*** *link in the success message.* (Figure 5)

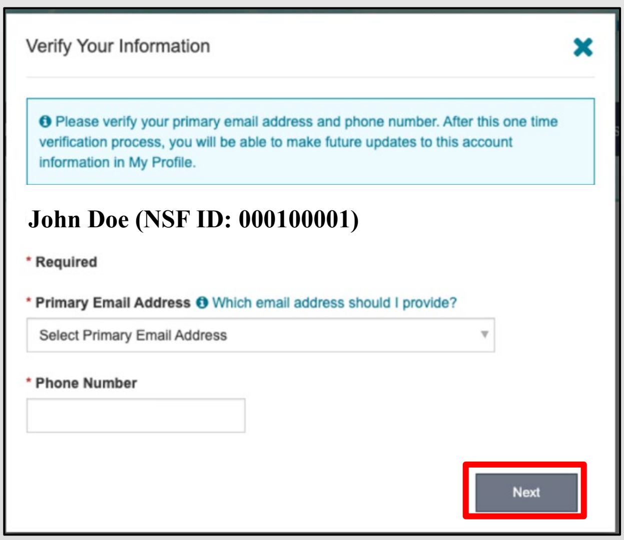


Figure 4

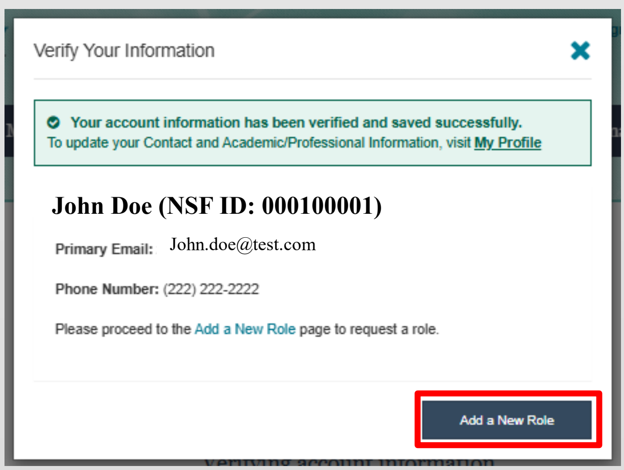


Figure 5

Migrate Your Existing NSF Account (continued)

What happens when the system prompts me to verify my information but tells me I have multiple accounts that need to be reconciled?

- You will receive a Verify Your Information pop-up message. After you read it, click "**Next**." (Figure 3)
- The "Multiple Accounts Found" pop-up informs you that your email address(es) is associated with more than one NSF ID. (Figure 6)
- Click "**Go To Research.gov Home Page**." (Figure 6)
- **Important Note:** Please be aware that the system will allow you to access Research.gov functionality for a grace period of 30 days while you work with the NSF IT Service Desk to reconcile your accounts.

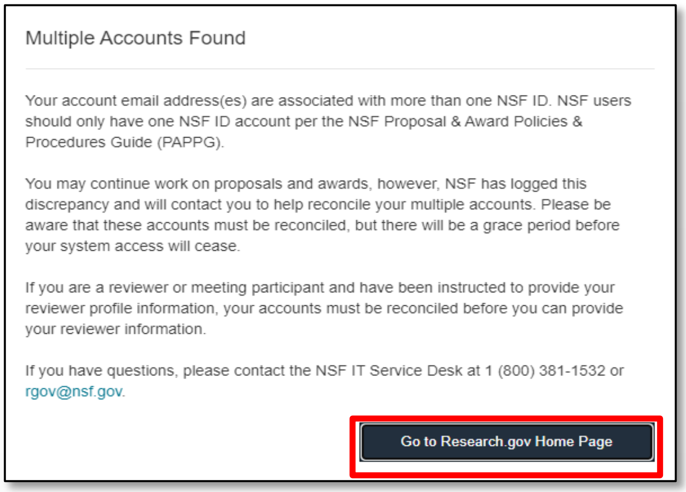


Figure 6

What do I do if my grace period has expired?

- You will receive a Verify Your Information pop-up message. After you read it, click "**Next**." (Figure 3)
- The "Multiple Accounts Found" pop-up informs you that an update to your account is required in order to restore service. (Figure 7)
- This pop-up will appear each time you sign in until you contact the NSF IT Service Desk to reinstate your access to NSF systems. (Figure 7)
- Click "**Close**." (Figure 7)

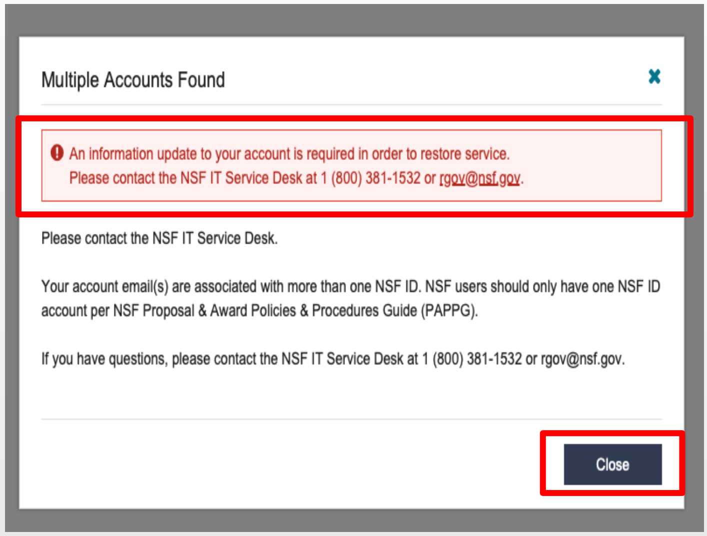


Figure 7

What do I do if the system is telling me that my email address is not in the correct format?

- You will receive a Verify Your Information pop-up message. After you read it, click "**Next**." (Figure 3)
- Notice the "Account Verification Failure" pop-up informing you that your email address(es) is in an invalid format. (Figure 8)
- You must contact the NSF IT Service Desk to address this issue. (Figure 8)
- Click "**Close**." (Figure 8)

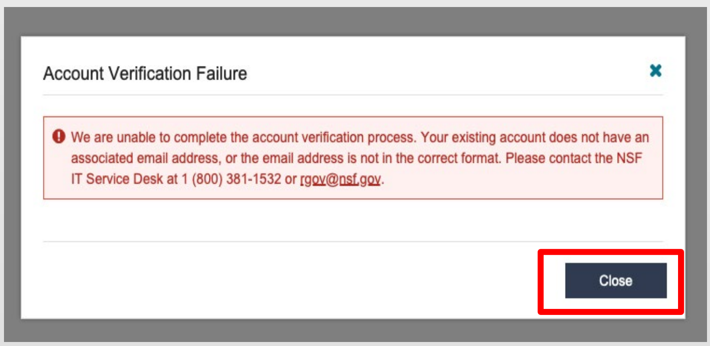


Figure 8

Helpful Tip

For instructions on how to make changes to your account profile information after your existing NSF account has been migrated to the Account Management System in Research.gov, please refer to the View and Edit My NSF Account Profile Information job aid.

Reviewer Job Aids

Volunteer to Review

NSF requires all reviewers and participants in panels, site visits, advisory committees, subcommittees, and committees of visitors to have an NSF account in Research.gov and complete a one-time registration process to provide their reviewer profile information. Researchers can now join NSF's reviewer pool without being invited by NSF program staff to join a proposal review panel or complete an *ad hoc* proposal review. To do this, researchers complete the new Volunteer to Review process in Research.gov to provide their reviewer profile including identifying areas of expertise. See the Reviewing for NSF page and the Volunteer to Review guide for more information.

Access Research.gov

- If you do not already have an NSF account in Research.gov, please refer to the Register for a New NSF Account job aid and Register for a New NSF Account video tutorial for steps to register for an account.
- Once you have an NSF account, open Research.gov.
- Click "Sign In" located at the top right of the screen. (Figure 1)
- Click **"Continue to Research.gov Sign In Options"**, enter your credentials (e.g., NSF ID and password) and sign in using your selected security method (i.e., multifactor authentication method) (Figure 2). If you have not set up your preferred security method yet, you will be prompted to complete this activity to access your account. *For more information on setting up your preferred security method including how-to guides, video tutorials, and FAQs, visit the About Signing Into Research.gov page.*

Figure 1

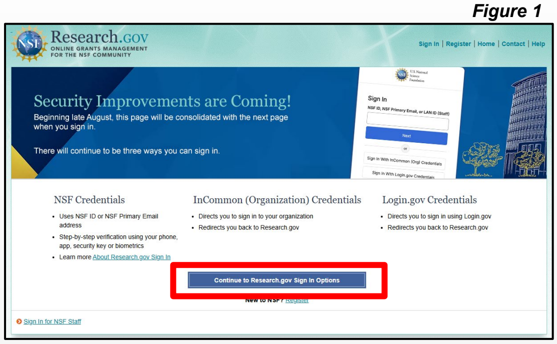


Figure 2

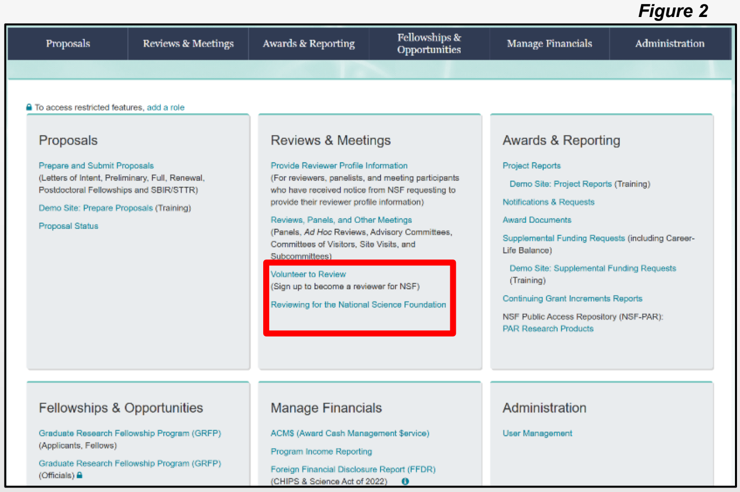


Figure 3

Volunteer to Review

- Once you've successfully signed in using your preferred security method, you will see a **"Reviews & Meetings"** tile on the Research.gov homepage. (Figure 3)
- You can also find the Volunteer to Review link under the **"Reviews & Meetings"** drop-down tab in the top navigation menu (Figure 4)
- Click the **"Volunteer to Review"** link to begin the one-time process to volunteer to review.
- After you complete this one-time process, the Volunteer to Review link will no longer display when you sign into Research.gov.

Benefits of Reviewing Proposals for NSF

- Click on the "Reviewing for National Science Foundation" link on the **"Reviews & Meetings"** tile on the Research.gov homepage to learn about the benefits of being a reviewer. (Figure 3)
- You can also find the Reviewing for the National Science Foundation link under the **"Reviews & Meetings"** drop-down tab in the top navigation menu. (Figure 4)

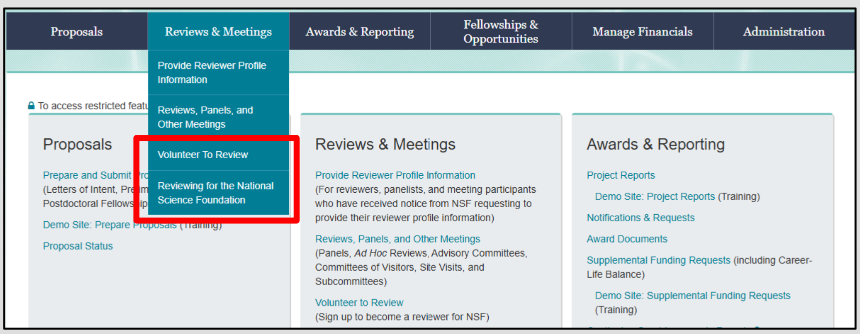


Figure 4

Volunteer to Review (continued)

Reviewing for the National Science Foundation Page

- The new Reviewing for the National Science Foundation page highlights the benefits and opportunities of becoming a reviewer for NSF and participating in activities such as panels, meetings, and *ad hoc* reviews.
- Click on the orange "**Volunteer Now**" box or the "**Volunteer to review**" link in the Qualify to Become a Reviewer section to start the process to join NSF's reviewer pool. (Figure 5)

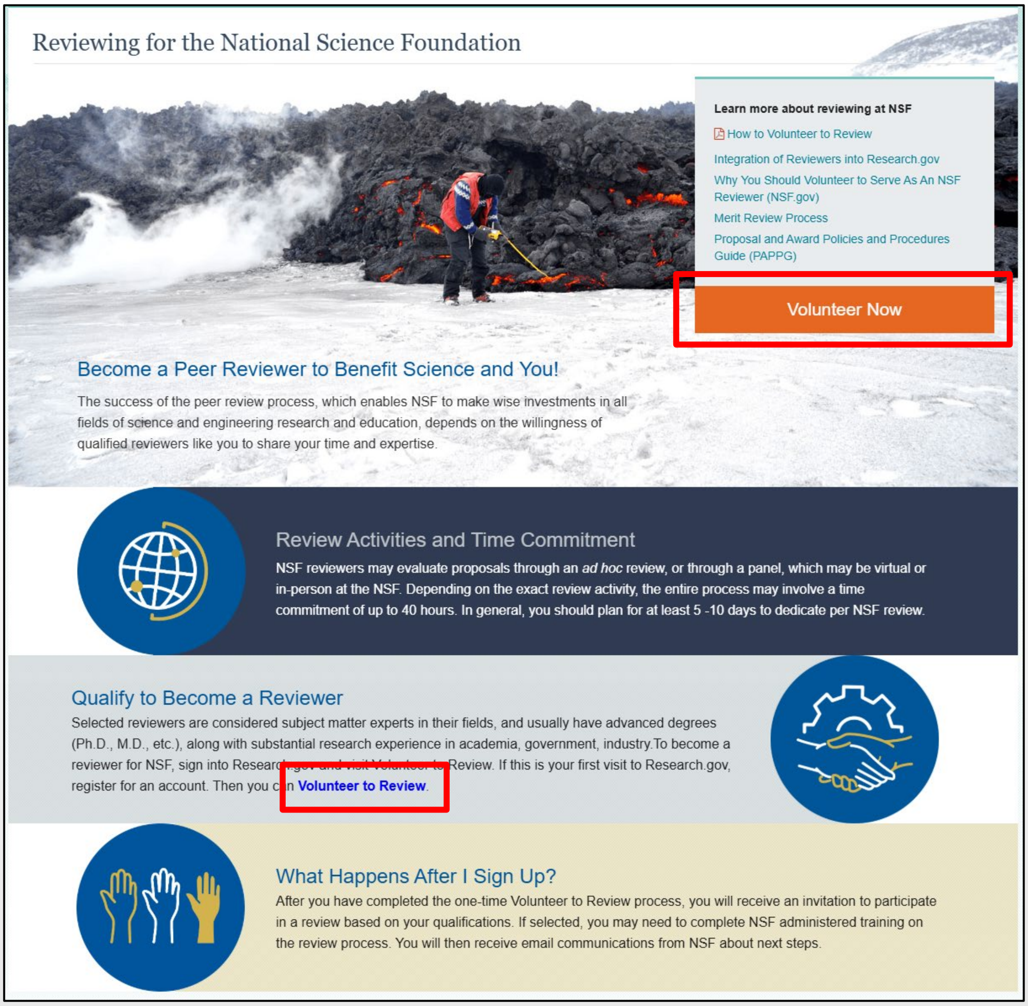


Figure 5

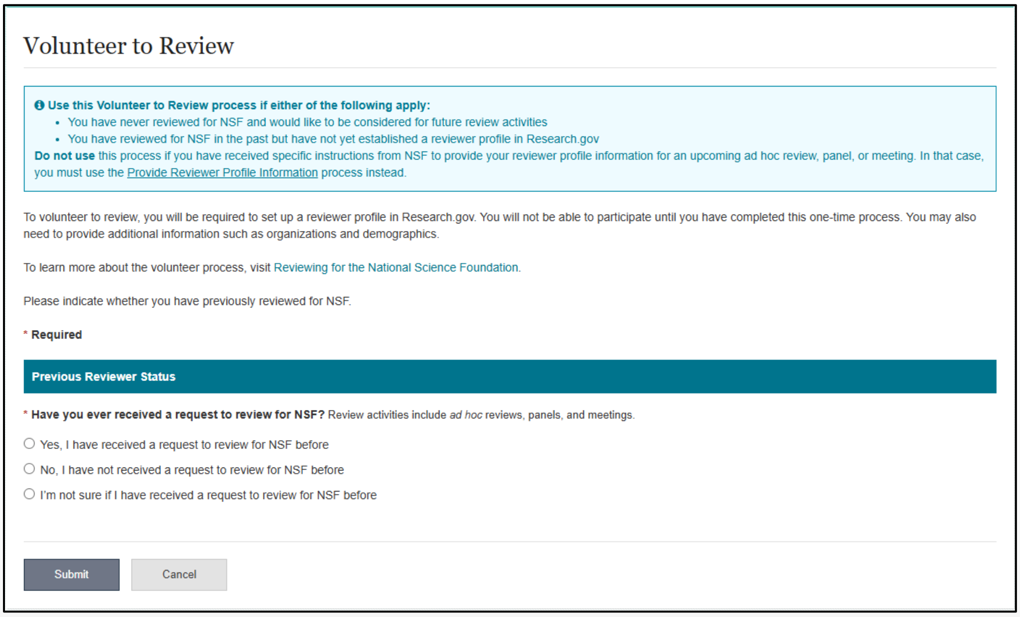
- ***Important Note**: If you have completed your Reviewer Profile and are already in NSF's reviewer pool, clicking the "**Volunteer Now**" or "**Volunteer to Review**" links will generate a message to confirm that you that you have already completed your Reviewer Profile. (Figure 6)*

> **Volunteer to Review**
>
> Our records indicate that you have already completed this one-time process to provide reviewer profile information on MM/DD/YYYY.
>
> Please refer to the Reviews, Panels, and Other Meetings page to view any upcoming *ad hoc* reviews, panels, or other meetings.
> You can also visit your My Profile page to ensure that your account information is up to date.
>
> If you have questions, please contact the NSF IT Service Desk at 1 (800) 381-1532 or via rgov@nsf.gov.

Figure 6

Previous Reviewer Status

- If you have received a review request from NSF program staff in the past to review, your reviewer information may already be in the NSF Reviewer system.
- Click **Yes** or **I'm not sure** to "Have you ever received a request to review for NSF." You will be prompted to answer additional questions to verify your reviewer identity. (Figure 7)
- If you have not previously received a request to review for NSF, click **No** and click **Submit** to be navigated to Provide Reviewer Profile Information.



Volunteer to Review

Use this Volunteer to Review process if either of the following apply:
- You have never reviewed for NSF and would like to be considered for future review activities
- You have reviewed for NSF in the past but have not yet established a reviewer profile in Research.gov

Do not use this process if you have received specific instructions from NSF to provide your reviewer profile information for an upcoming ad hoc review, panel, or meeting. In that case, you must use the Provide Reviewer Profile Information process instead.

To volunteer to review, you will be required to set up a reviewer profile in Research.gov. You will not be able to participate until you have completed this one-time process. You may also need to provide additional information such as organizations and demographics.

To learn more about the volunteer process, visit Reviewing for the National Science Foundation.

Please indicate whether you have previously reviewed for NSF.

* Required

Previous Reviewer Status

* **Have you ever received a request to review for NSF?** Review activities include *ad hoc* reviews, panels, and meetings.

Yes, I have received a request to review for NSF before

No, I have not received a request to review for NSF before

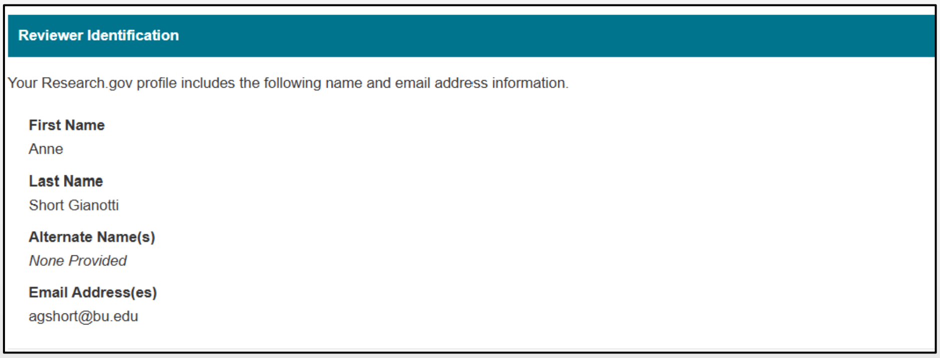
I'm not sure if I have received a request to review for NSF before

Submit Cancel

Figure 7

Reviewer Identification

- Clicking **Yes** or **I'm not sure** will display your stored Research.gov profile information including your first name, last name, any alternate names, and your email address(es). (Figure 8)



Reviewer Identification

Your Research.gov profile includes the following name and email address information.

First Name
Anne

Last Name
Short Gianotti

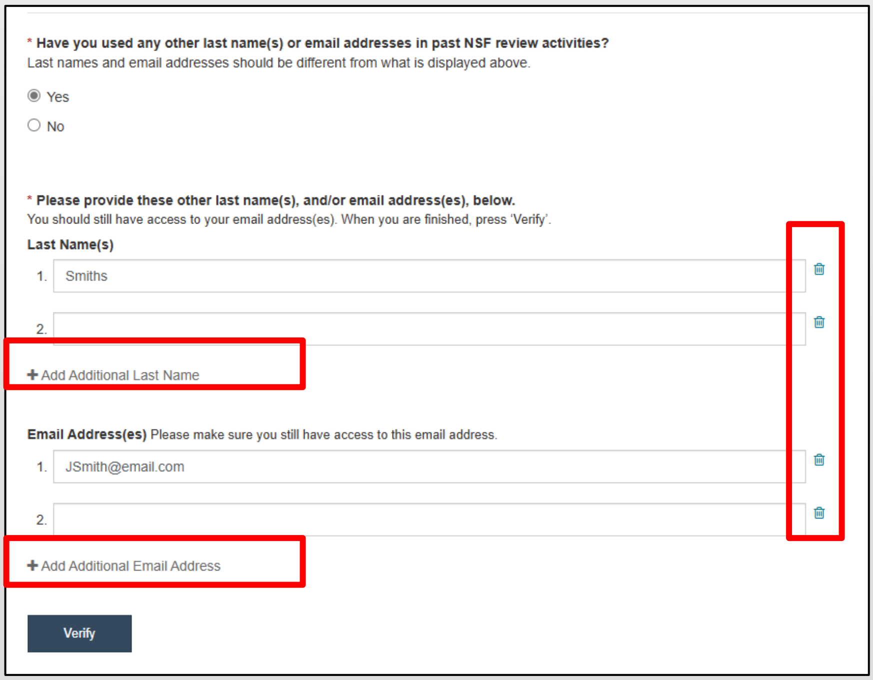
Alternate Name(s)
None Provided

Email Address(es)
agshort@bu.edu

Figure 8

Adding Additional Last Name(s) and & Email Adress(es)

- Click "**Yes"** to add any additional last names or email addresses that you may have been used for past NSF review activities. (Figure 9)
- Click on "**Add Additional Last Name**" or "**Add Additional Email Address(es)**" to provide other last names or email addresses used for past NSF review activities.
- Click the delete icon to remove the additional rows or entries as necessary.
- Click "**Verify.**"
- If you do not have any additional last names or email addresses, click **No** and click "**Verify.**"



* **Have you used any other last name(s) or email addresses in past NSF review activities?**
Last names and email addresses should be different from what is displayed above.

Yes

No

* **Please provide these other last name(s), and/or email address(es), below.**
You should still have access to your email address(es). When you are finished, press 'Verify'.

Last Name(s)

1. Smiths
2.

+ Add Additional Last Name

Email Address(es) Please make sure you still have access to this email address.

1. JSmith@email.com
2.

+ Add Additional Email Address

Verify

Figure 9

Volunteer to Review (continued)

Verify Your Email Address

- You may be prompted to verify your email address after clicking the "**Verify**" button.
- Enter the one-time password provided in an email to you from NSF (noreplyadmin@nsf.gov) with the subject "NSF Email Verification - Your One-Time Password." If you cannot locate the email, click the "generate a new one" link on the screen or contact the NSF IT Service Desk at 1-800-381-1532 for assistance. (Figure 10)
- Click "**Continue**."

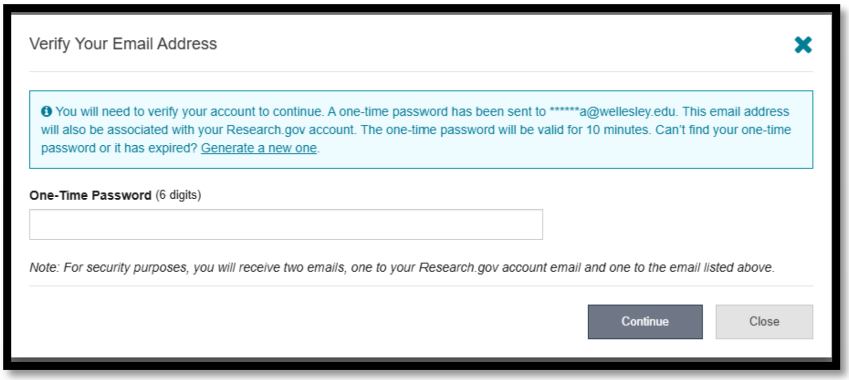


Figure 10

Additional Authentication

- If you have previously reviewed for NSF and provided your phone number or Social Security Number (SSN) during registration, you will be asked to provide this information in the Additional Authentication section to verify your identity.
- Select the correct phone number from the listed options.
- Input the last 4 digits of your SSN or select "I don't have an SSN."
- For more information on why additional authentication is needed, please see "Privacy Act Statement" linked on the Additional Verification page. (Figure 12)
- Click "**Submit**."
- Clicking the "**Submit**" button will navigate you to Provide Reviewer Profile Information.

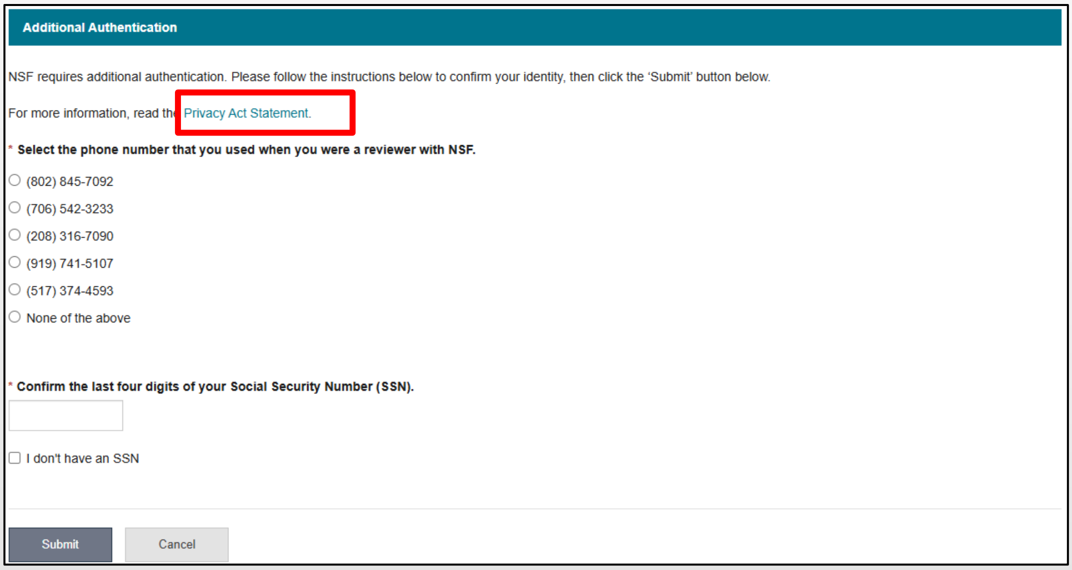


Figure 11

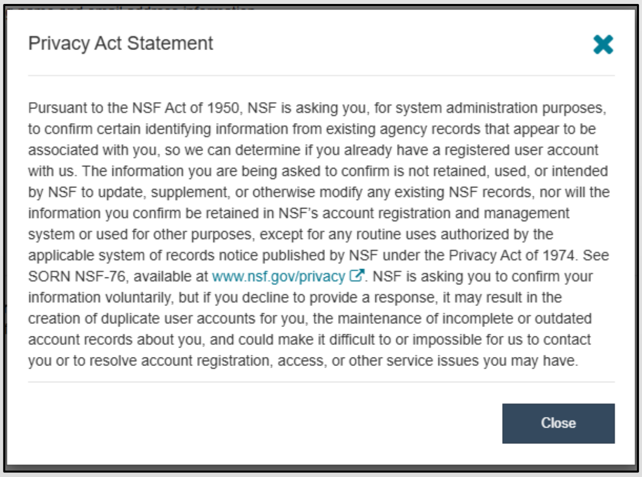


Figure 12

Provide Reviewer Profile Information

Provide Reviewer Profile Information

NSF requires all reviewers and participants in panels, site visits, advisory committees, subcommittees, and committees of visitors to have an NSF account in Research.gov and complete a one-time registration process to provide their reviewer profile information. Until this is completed, reviewers cannot open the Reviews, Panels, and Other Meetings page in order to access proposals for *ad hoc* reviews, panelist, activities, meeting registration, and meeting sign-in.

Access Research.gov

- If you do not already have an NSF account in Research.gov, please refer to the Register for a New NSF Account job aid and Register for a New NSF Account video tutorial for steps to register for an account.
- Once you have an NSF account, open Research.gov.
- Click "Sign In" located at the top right of the screen. (Figure 1)
- Click **"Continue to Research.gov Sign In Options"**, enter your credentials (e.g., NSF ID and password) and sign in using your selected security method (i.e., multifactor authentication method) (Figure 2). If you have not set up your preferred security method yet, you will be prompted to complete this activity to access your account. *For more information on setting up your preferred security method, including how-to guides, video tutorials, and FAQs, visit the About Signing Into Research.gov page.*

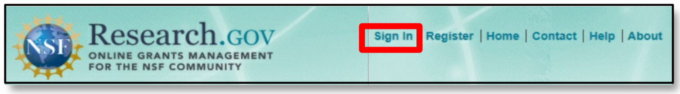


Figure 1

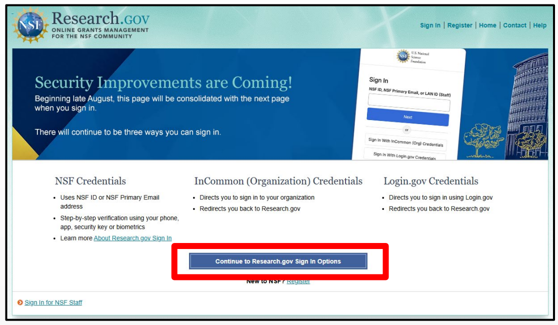


Figure 2

Submit Invitation Code or Email Address

- Once you've successfully signed in using your preferred security method, you will see a **"Reviews & Meetings"** tile on the Research.gov homepage. (Figure 3)
- Click the **"Provide Reviewer Profile Information"** link to begin the one-time process to provide your reviewer profile information. Any information you previously provided to NSF will be pre-populated. (Figure 3) Note that after you complete the one-time process and sign back into Research.gov, the Provide Reviewer Profile Information link will no longer be displayed.
- Enter the invitation code provided in an email to you from NSF (noreply@nsf.gov) with the subject "Review for NSF - Action Needed." If you cannot locate the email, please contact the NSF IT Service Desk at 1-800-381-1532 to have it re-sent. Alternatively, enter the email address where you received the notification from NSF for the review or meeting. (Figure 4)

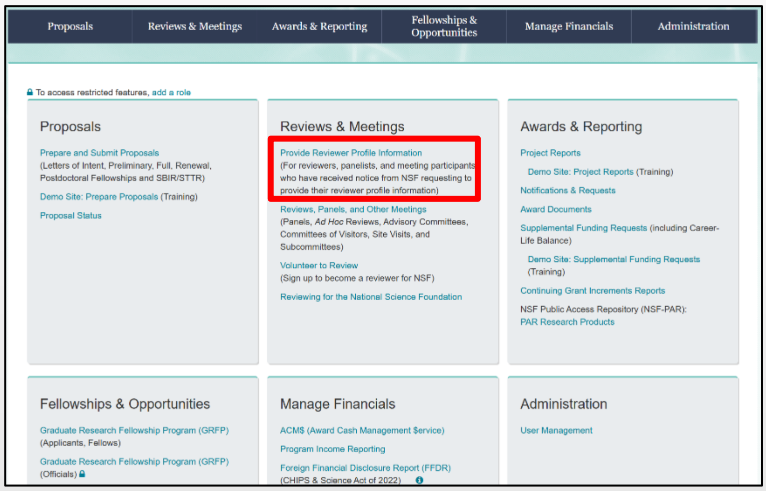


Figure 3

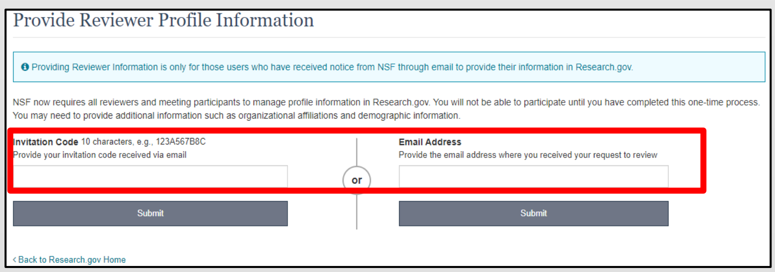


Figure 4

- Click **"Submit."**
- ***Important Note:*** *You will only receive an email with instructions to provide reviewer profile information if you are invited by an NSF program staff to review a proposal or participate in a panel, site visit, advisory committee, subcommittee, or committee of visitors meeting. If you believe you should have received an email with an invitation code or for additional assistance, contact the NSF IT Service Desk at 1-800-381-1532 or rgov@nsf.gov.*

Verify Your Email Address

- You may be prompted to verify your email address after submitting your invitation code by entering a one-time password that will be sent to your email address. (Figure 5)
- Enter the one-time password provided in an email to you from NSF (noreplyadmin@nsf.gov) with the subject "NSF Email Verification - Your One-Time Password." If you cannot locate the email, click the "generate a new one" link on the screen or contact the NSF IT Service Desk at 1-800-381-1532 for assistance. (Figure 5)
- Click "**Continue**."

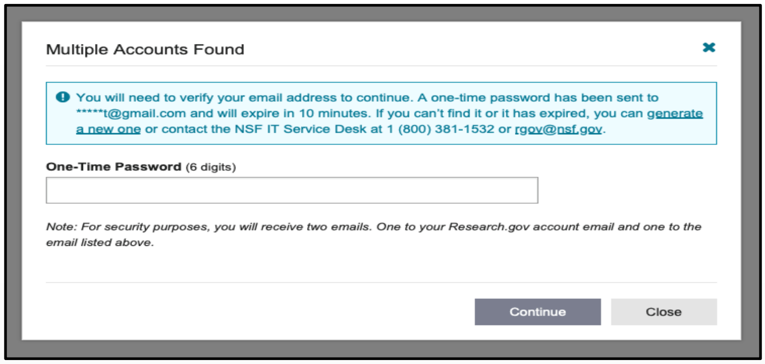


Figure 5

After entering your invitation code or email address, you will be navigated to a five-step wizard to enter reviewer profile information including organizational affiliations, demographic information, academic and professional references, and preferred contact information for reviewer/meeting activities. All information can be updated at any time by accessing "**My Profile**" in Research.gov.

Step 1: Organizational Affiliation(s)

- Indicate if you have been affiliated with any organizations in the past 12 months. (Figure 6)
- If you select "**No**", click "**Next**" to continue.
- If you select "**Yes**", you will need to add your organizational affiliations.

***Important Note**: If you already have an organization-approved role (e.g., PI role) at NSF, then "Yes" will be automatically selected by default and the "No" option will be disabled. (Figure 9)*

Figure 6

Adding Organization(s)

- When "**Yes**" is selected, a field will appear for you to add your organizational affiliation(s). (Figure 7)
- Search for your organization by typing the name of the organization in the field. If the organization is registered in SAM.gov, then it will appear in the list along with the organization's SAM.gov-issued Unique Entity ID (UEI) and address. Select the organization from the list. (Figure 7)

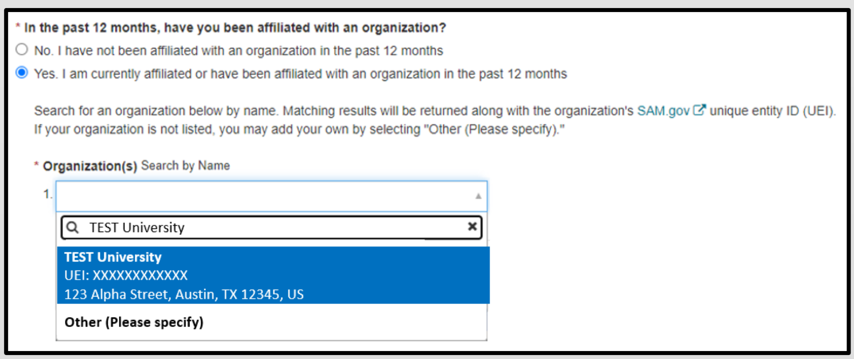


Figure 7

Adding Organization(s) - Continued

- If your organization is not in the system, you can add the organization by selecting the “**Other (Please specify)**” option. (Figure 8)
- If you have been affiliated with more than one organization in the past 12 months, click "**Add Additional Organization**“ and repeat the process to add the other organizational affiliations. (Figure 8)
- If necessary, you can delete an organization you entered using the trash can icon. (Figure 8)
- Click **“Next”** to continue.

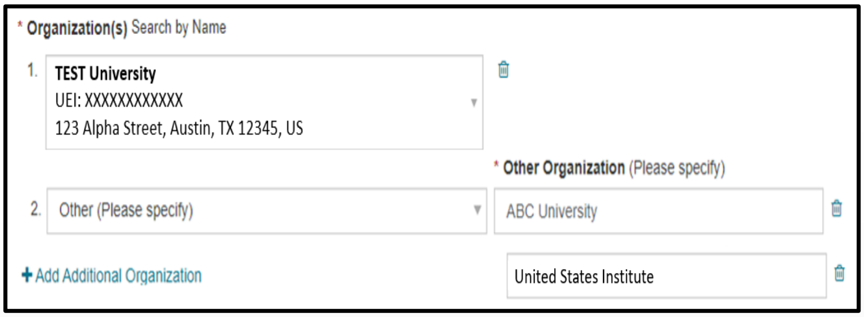


Figure 8

***Important Note**: If you already have an organization-approved role (e.g., PI role) at NSF, then the organization(s) affiliated with your role(s) will be listed. You cannot delete these organizations from the list. However, you can indicate if you have not been affiliated in the past 12 months with an organization by clicking the checkbox next to it. (Figure 9)*

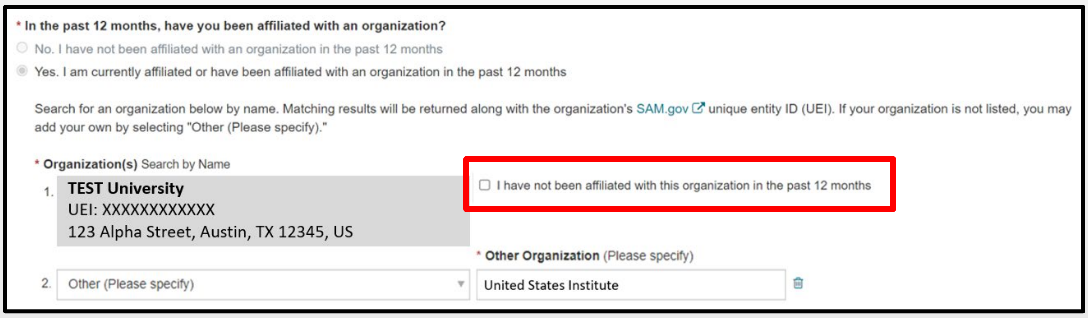


Figure 9

Helpful Tips

- If you have questions about organizational affiliations, click the "What is an organizational affiliation?" link for clarification.
- Unique Entity Identifiers (UEI) are issued by the System for Award Management (SAM). Please refer to SAM.gov. Note that completion of the SAM registration process may take up to one month.

Step 2: Affiliation Details

- If your organization is registered in [SAM.gov](SAM.gov), the organization address will be pre-populated. Enter your Department/Office/Subunit. (Figure 10)
- If your organization is not registered in [SAM.gov](SAM.gov), you must enter the required address fields denoted by a red asterisk (*), along with your Department/Office/Subunit. (Figure 11)
- If you are currently affiliated or have been affiliated with more than one organization in the past 12 months, you must select a primary organization from the list. If you have an organization-approved PI role, this selection will not affect any NSF proposal preparation or submission activities in Research.gov or Grants.gov. (Figure 12)
- Click **"Next."**

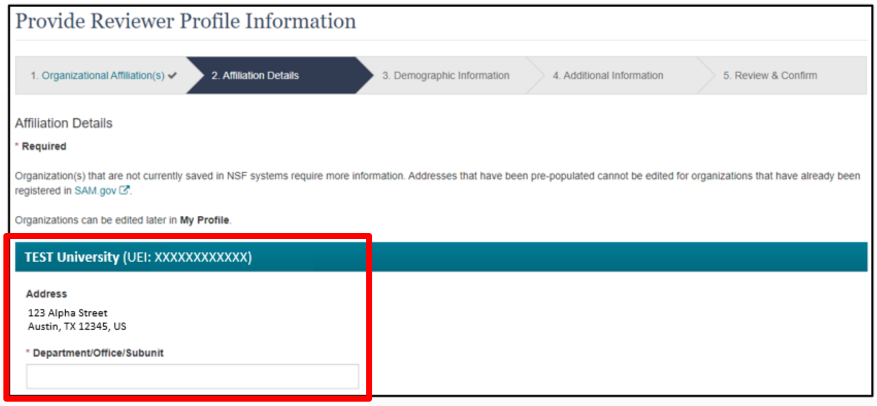


Figure 10

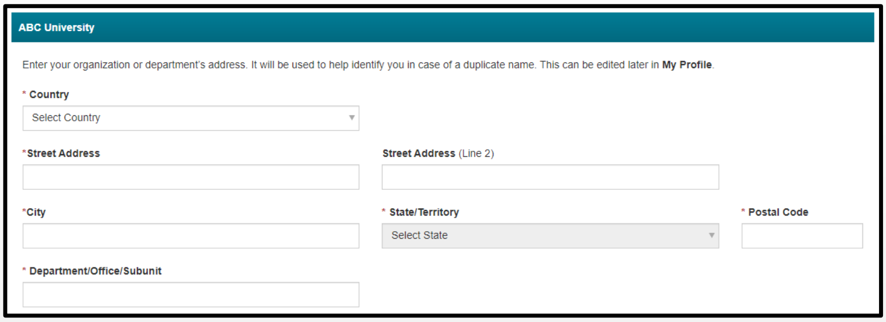


Figure 11

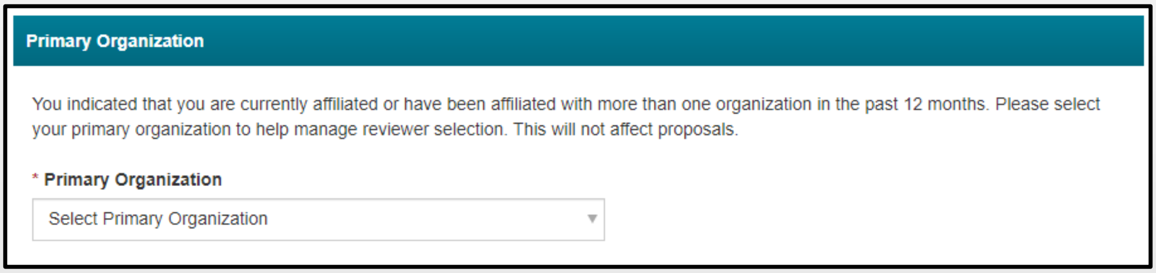


Figure 12

Step 3: Demographic Information

- Complete the required fields denoted by a red asterisk (*). (Figure 13)
- If you have previously provided your demographic information, this information will be pre-populated. Review your responses and make any necessary updates.
- Click **"Next."**
- ***Important Note***: *Your demographic information will not be shared with your organizational contacts.*

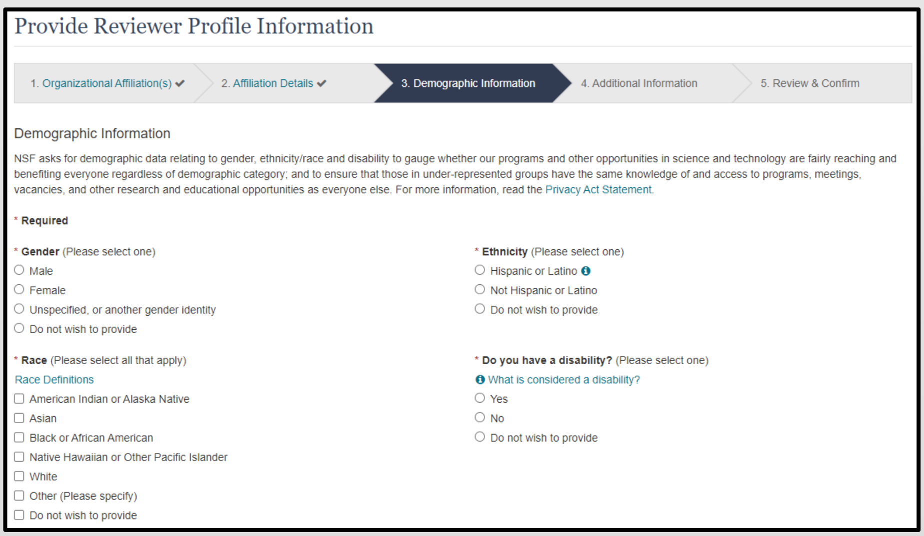


Figure 13

Step 4: Additional Information

- Complete the required fields denoted by a red asterisk (*). (Figures 14 and 15)
- If you have previously provided your highest degree, areas of expertise, or professional references, this information will be pre-populated. Review your responses and make any necessary updates.
- Click "**Next**."

Helpful Tips

- Preferred Email Address for Review/Meeting Activities is the email address NSF will use for review activities related to panels, site visits, advisory committees, subcommittees, and committees of visitors only. Adding this preferred email address will not affect your primary, secondary, or organizational email address information in the Account Management System.
- Preferred Phone Number for Review/Meeting Activities may be used during an active panel, site visit, advisory committee, subcommittee, or committee of visitors meeting for NSF staff to contact you if you are unreachable via email. This is not for texting purposes and will not affect your other contact information in the Account Management System.
- You must provide at least one area of expertise but may not provide more than five.

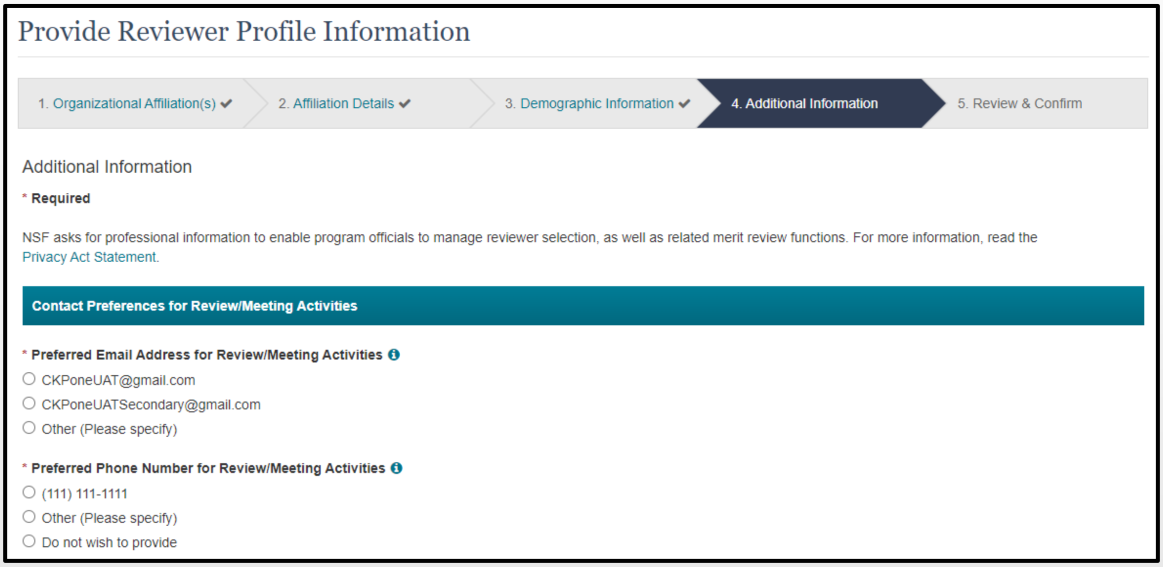


Figure 14

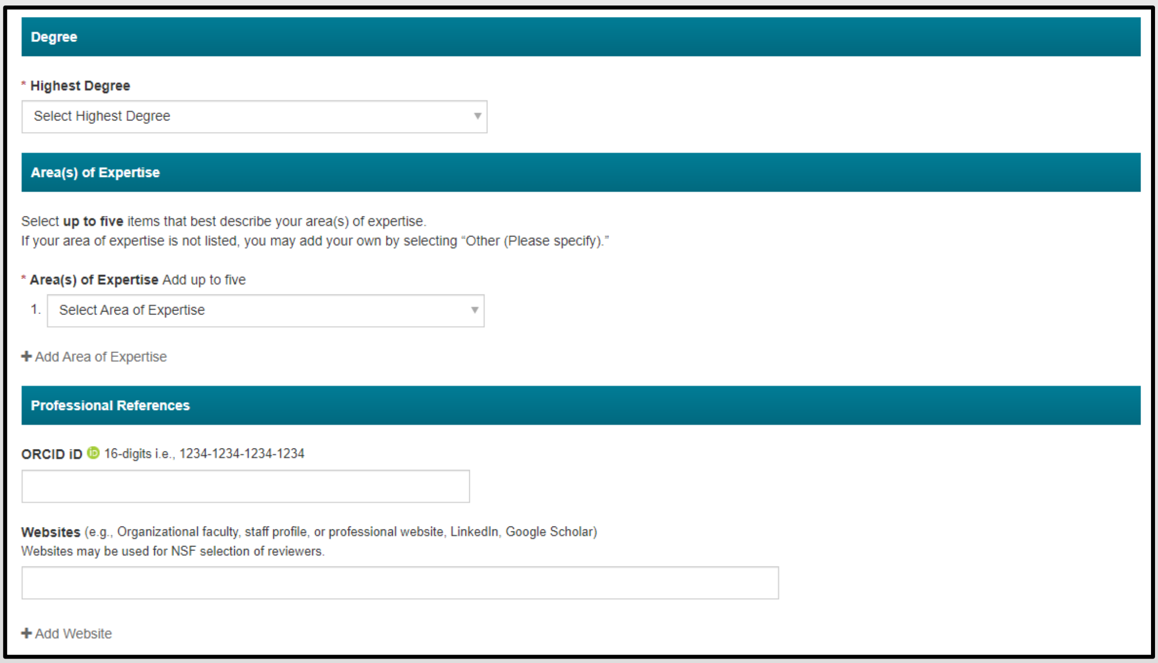


Figure 15

Step 5: Review & Confirm

- Review your information for accuracy and click **"Submit."** (Figure 16)

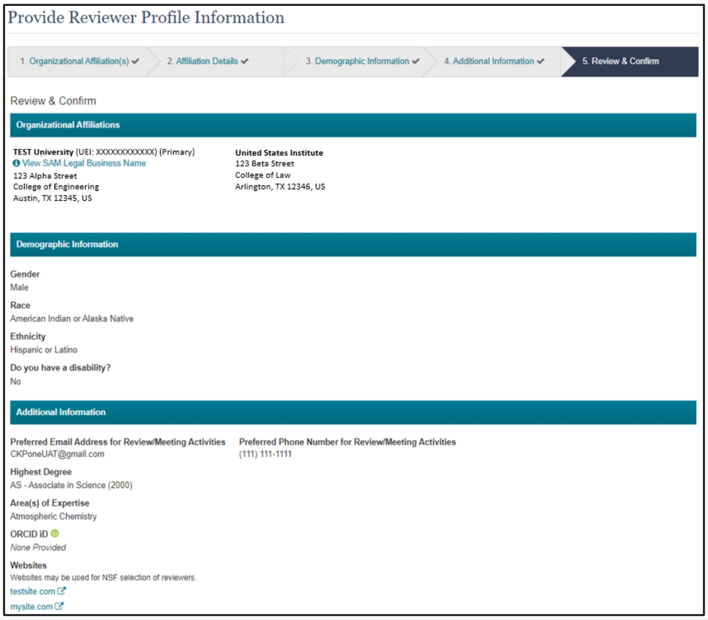


Figure 16

- If you indicated that you have **not** been affiliated with an organization in the past 12 months, a warning message will display asking you to review this information since most reviewers have at least one organizational affiliation. (Figure 17)

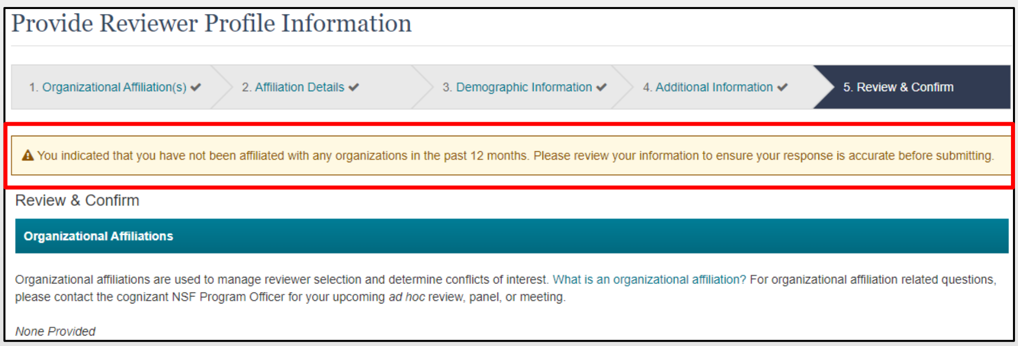


Figure 17

Submission Confirmation

- View the success message on My Profile to confirm you have successfully provided your reviewer profile information. (Figure 18)

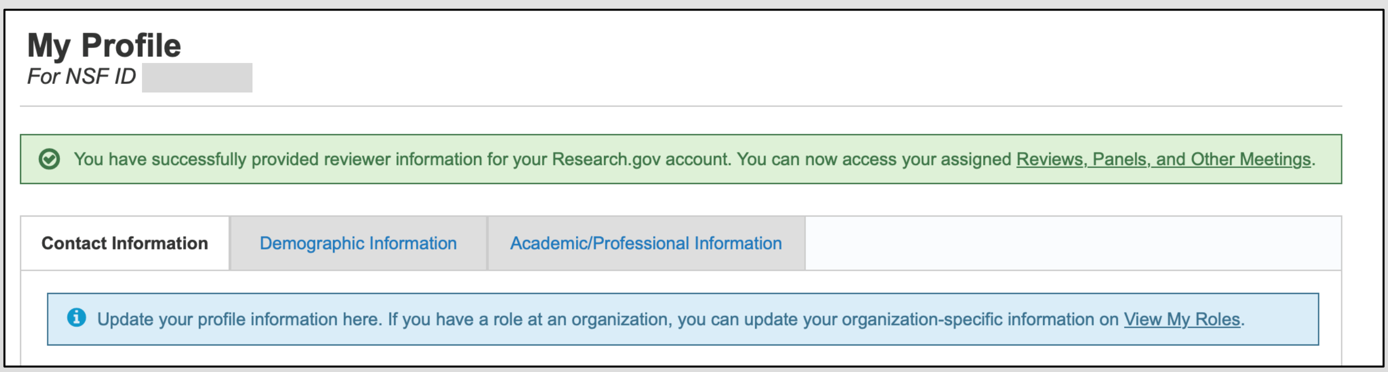


Figure 18

View and Edit My NSF Reviewer Account Profile Information

View and Edit My NSF Reviewer Account Profile Information

Once you have an NSF account and completed the one-time process to provide your reviewer profile information, you can view and edit your account profile information at any time via the View/Edit My Profile page. Follow the step-by-step instructions below to update your account information including contact information, demographic information, and professional information.

On an annual basis, all users with an NSF account will be prompted to review their account profile information to ensure their information is up-to-date.

Step 1: Access the View/Edit My Profile page

- Open Research.gov
- Click **"Sign In"** located at the top right of the screen. (Figure 1)
- Click **"Continue to Research.gov Sign In Options"**, enter your credentials (e.g., NSF ID and password) and sign in using your selected security method (i.e., multifactor authentication method) (Figure 2). If you have not set up your preferred security method yet, you will be prompted to complete this activity to access your account. *For more information on setting up your preferred security method including how-to guides, video tutorials, and FAQs, visit the About Signing Into Research.gov page.*
- Once you've successfully signed in using your preferred security method, click **"My Profile"** from the top right of the screen. (Figure 3)

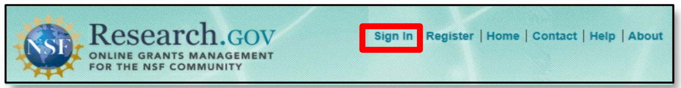


Figure 1

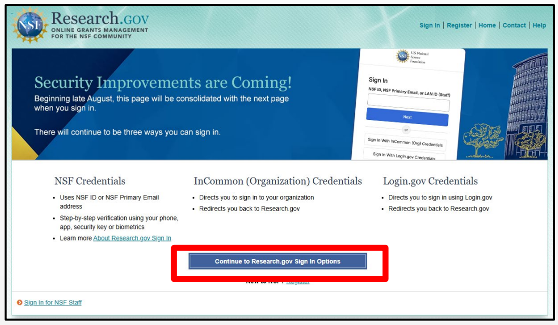


Figure 2

Figure 3

***<u>Important Note</u>:** You can also access the View/Edit My Profile page by clicking on "View/Edit Profile" located on the left navigation bar.* (Figure 4)

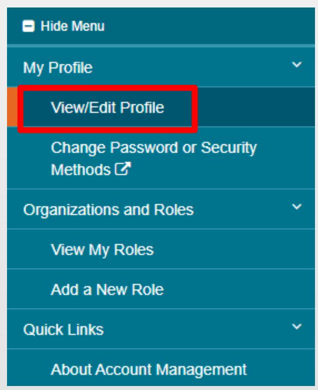


Figure 4

View and Edit My NSF Reviewer Account Profile Information (continued)

Step 2: Edit your Contact Information

- Click **"Edit"** at the bottom of the **Contact Information** tab on the **My Profile** page. (Figure 5)
- Enter your updated contact information and click **"Save."** (Figure 6)

<u>Important Notes</u>:

- ***If you change your primary email address (i.e., the email address used to create your NSF account) and/or secondary email address, NSF will send you a verification email. You must verify the updated email address within four (4) hours, or your account email address will revert back to your last verified email address.***
- ***If your primary email address domain suffix is "edu", an important message and checkbox will display. Check the box to confirm ongoing access to an email account is required for communications and account recovery. By providing a ".edu" email address, you may lose access to this account and should provide a personal email address as your secondary email to ensure ongoing access.*** (Figure 6)

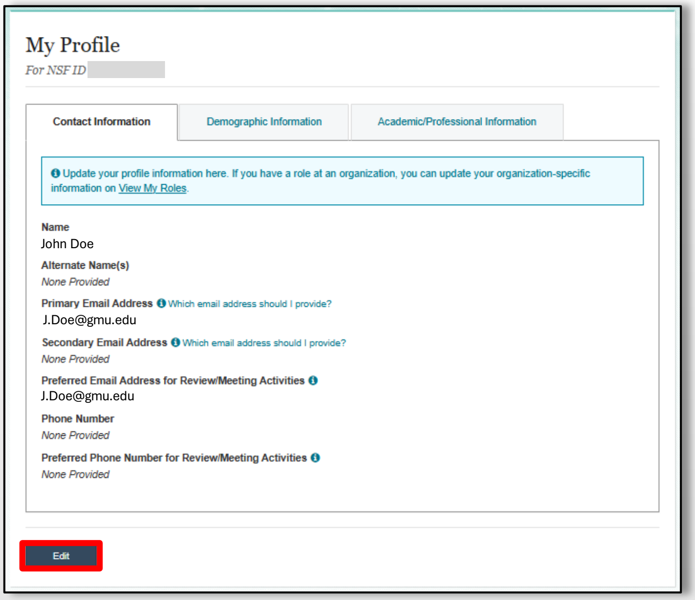


Figure 5

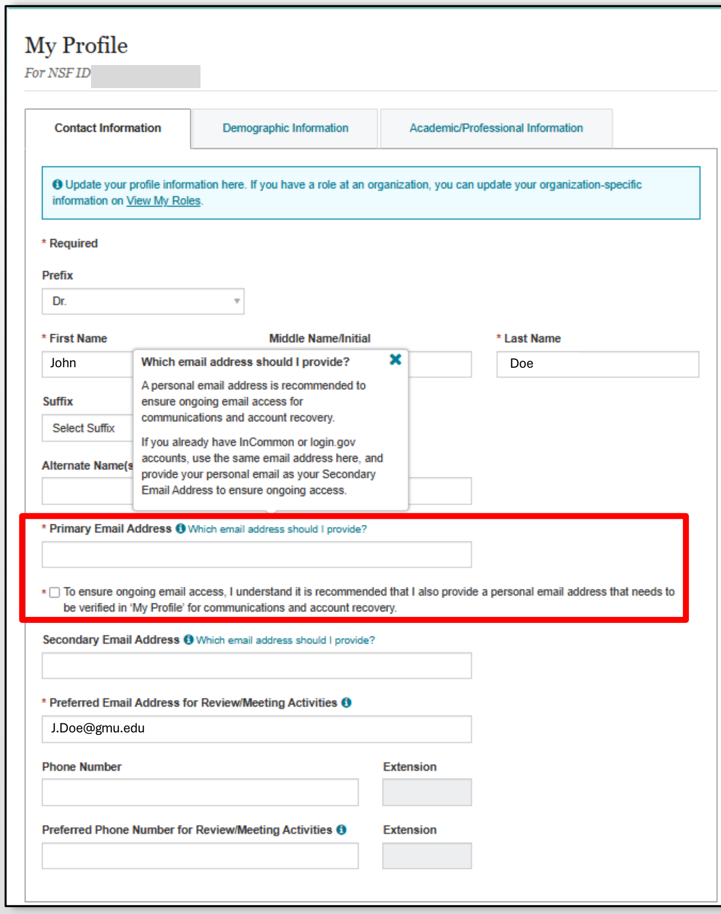


Figure 6

Helpful Tip

To ensure compliance with NSF's policy of allowing only one NSF account per user, you will not be able to save any email addresses to your account profile that are associated with another NSF account.

View and Edit My NSF Reviewer Account Profile Information (continued)

Step 3: Edit your Demographic Information

- Click **"Edit"** at the bottom of the **Demographic Information** tab on the **My Profile** page. (Figure 7)
- Enter your demographic information and click **"Save."** (Figure 8)

Important Notes:

- ***Submission of the requested demographic information is required for reviewers, individuals with an organization-approved PI role, and GRFP Fellows. Until responses to all demographic questions are provided, the "Save" button will be disabled.*** (Figure 8)
- ***The "Other" option for the race question will open an optional free text field for entry.*** (Figure 8)

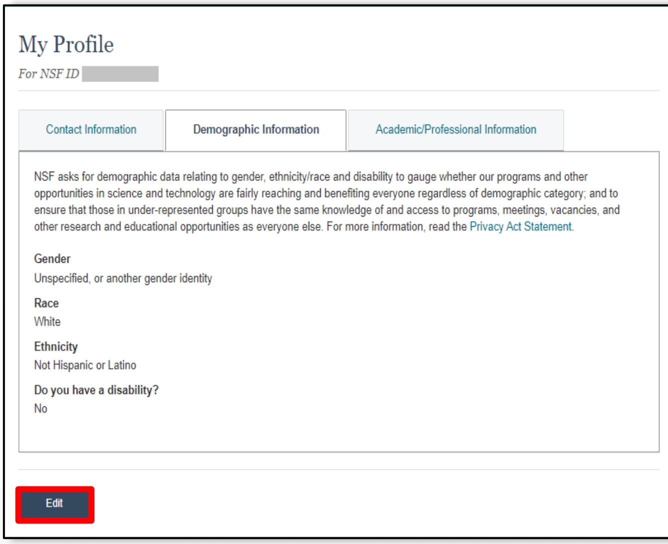


Figure 7

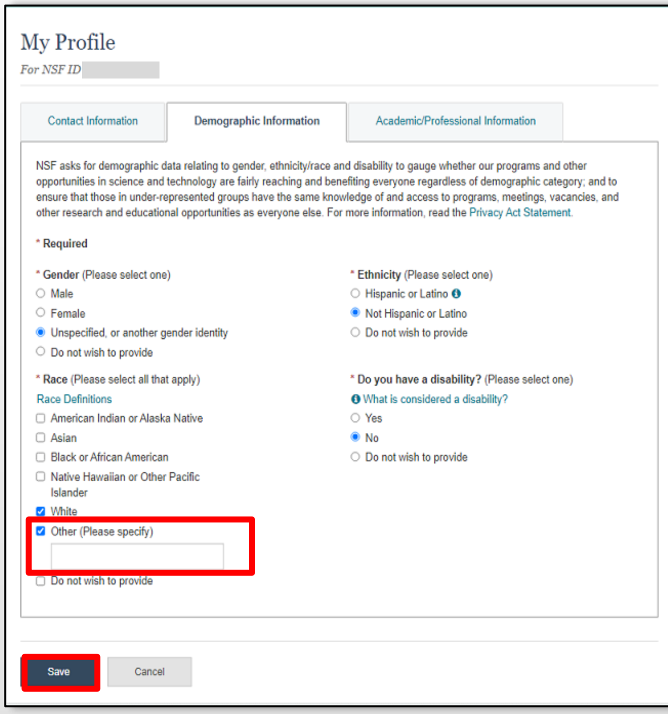


Figure 8

View and Edit My NSF Reviewer Account Profile Information (continued)

Step 4: Edit your Academic/Professional Information

- Click **"Edit"** at the bottom of the **Professional Information** tab on the **My Profile** page. (Figure 9)
- Reviewers can add a new organizational affiliation by clicking on the "Add New Organization" button and searching for the organization by name or use the "Other" option to enter an organization manually. (Figure 10)
- Organizational affiliations cannot be deleted by reviewers, but reviewers can indicate that they are no longer affiliated with an organization. (Figure 11)
- You may select a different primary organizational affiliation by selecting one from the drop-down. (Figure 12)
- Enter your updated academic and professional information, including highest degree, area(s) of expertise, ORCID iD and websites, and click **"Save."** (Figure 13)

<u>Important Notes:</u>

- ***Highest degree and area(s) of expertise are required for PIs and reviewers and optional for all other users.*** (Figure 13)
- ***Upon selection of your highest degree, you will be prompted to provide the year completed.*** (Figure 13)
- ***If your area(s) of expertise is not listed, you may enter a free text entry using the "Other" option.*** (Figure 13)

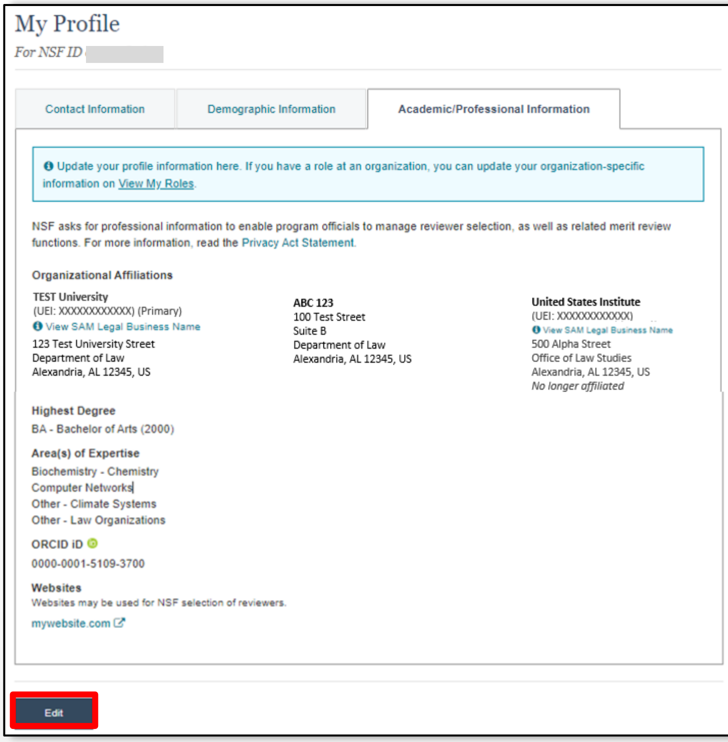


Figure 9

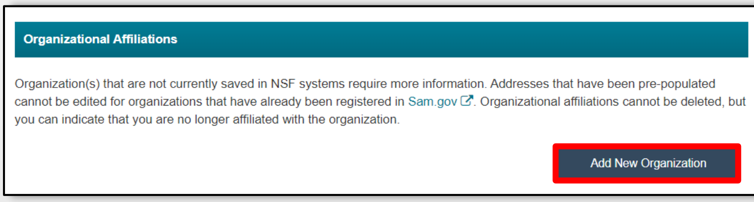


Figure 10

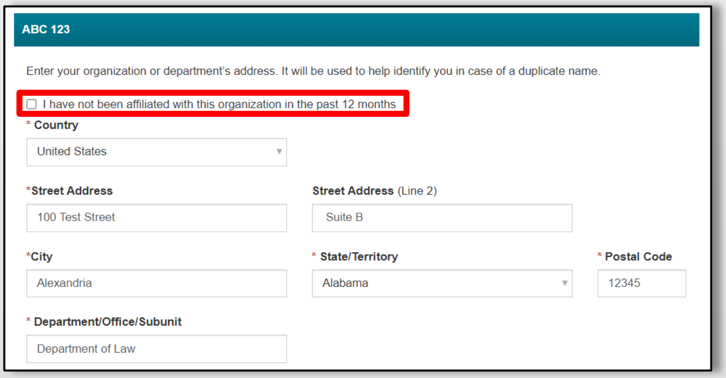


Figure 11

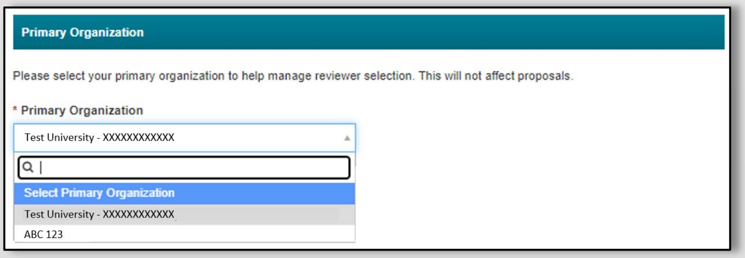


Figure 12

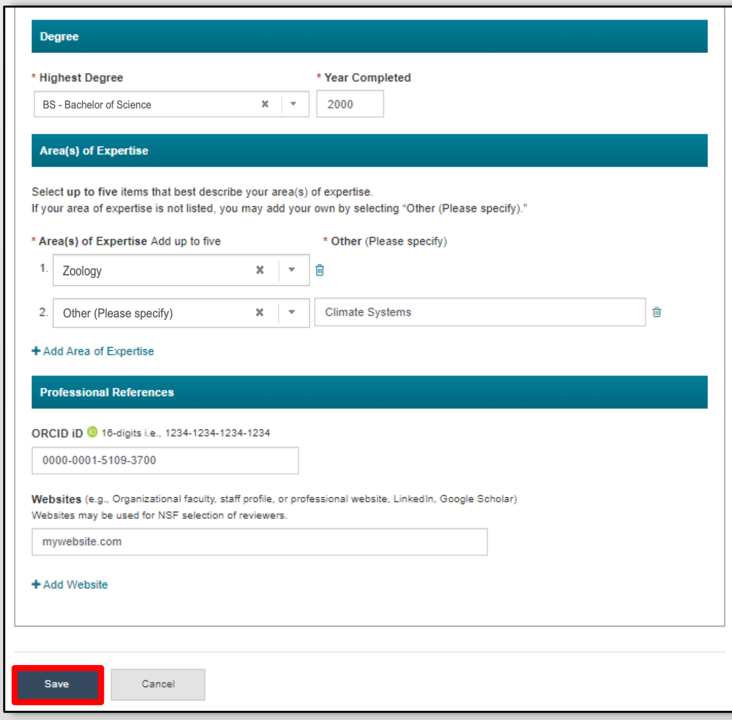


Figure 13

When updating my primary and/or secondary email, what do I do if I accidentally delete the verification email sent by NSF?

- Select the **"View/Edit My Profile"** option. (Refer to Step 1 in the View and Edit My NSF Reviewer Account Profile Information job aid)
- Within the **Email Verification Message** (Figure 14) located at the top of the **Contact Information** tab on the **My Profile** page, click "**Resend verification link(s)"** (Figure 15).
- A new verification email will be sent to your pending primary and/or secondary email address (i.e., the updated email address entered in Step 2 in the View and Edit My NSF Reviewer Account Profile Information job aid).

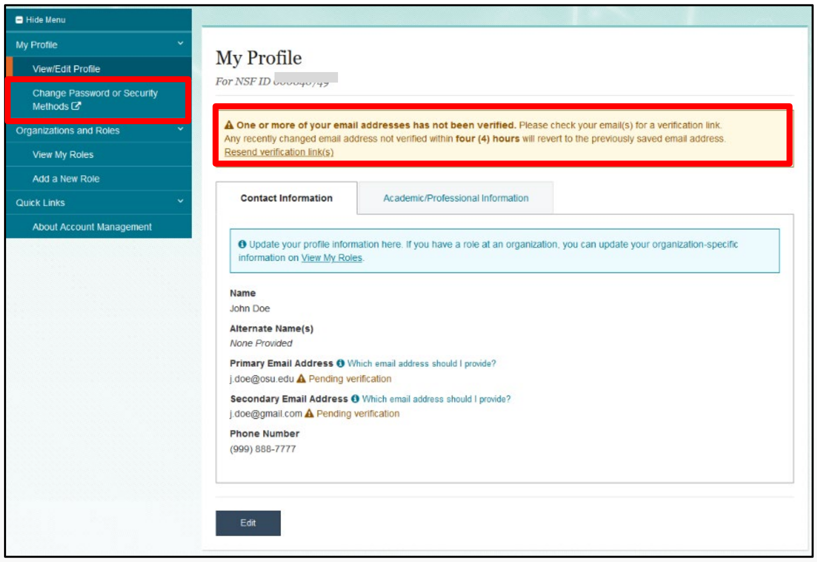


Figure 14

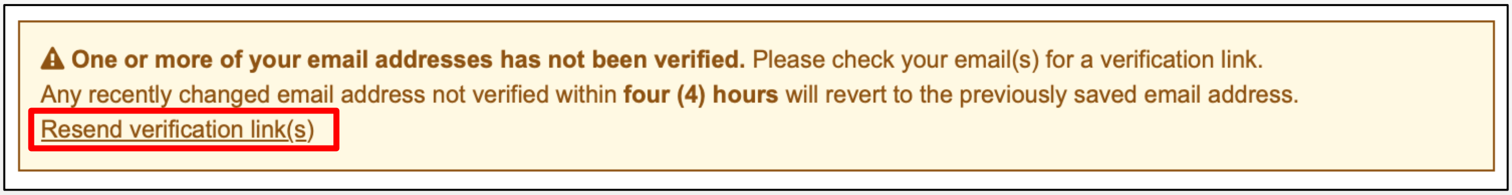


Figure 15

Important Notes:

- ***NSF will send you a verification email. You must verify the updated email address within four (4) hours, or your account email address will revert back to your last verified email address.***
- ***If the four (4) hours have passed, the resend verification email option will not be available and you will need to restart the process by updating your email address again. (Refer to Step 2 in the View and Edit My NSF Reviewer Account Profile Information job aid)***

How do I change my password?

- Select the **"View/Edit My Profile"** option. (Refer to Step 1 in the View and Edit My NSF Reviewer Account Profile Information job aid)
- Click **"Change Password or Security Methods"** located in the left navigation bar. (Figure 14)
- A new tab will open allowing you to change your password or security method. *For more information on changing your password, visit the About Signing Into Research.gov page.*

View My Reviewer/Meeting Participant Information

Account Management

View My Reviewer/Meeting Participant Information

The View My Roles page shows the organizational roles you have requested which are pending approval or disapproval from your organization's Administrator as well as your existing approved roles. Individuals who are reviewers will also see reviewer/meeting participant information including reviewer organizational affiliations displayed on this page. You may view and edit your organizational affiliations, preferred phone number, and email for review activities by following the step-by-step process below.

Access the View My Roles page

- Open Research.gov
- Click **"Sign In"** located at the top right of the screen.
- Click **"Sign In Using NSF Credentials"**, enter your credentials (e.g., NSF ID and password) and sign in using your selected security method (i.e., multifactor authentication method). If you have not set up your preferred security method yet, you will be prompted to complete this activity to access your account. *For more information on setting up your preferred security method including how-to guides, video tutorials, and FAQs, visit the About Signing Into Research.gov page.*
- Once you've successfully signed in using your preferred security method, click **"My Profile"** located at the top right of the screen.
- Click **"View My Roles"** from the left navigation bar.
- The **"View My Roles"** page displays the following information:
    - **Reviewer/Meeting Participant Information:** Displays all your organizational affiliation(s) that are active or have been active in the past 12 months if you are a reviewer. If you are not a reviewer, this section will not be displayed. (Figure 1)
    - **Requested Role(s):** Displays all organizational roles that you have requested that are pending approval from your organization's Administrator. (Figure 1)
    - **Active Role(s):** Displays all your approved organizational roles. (Figure 1)

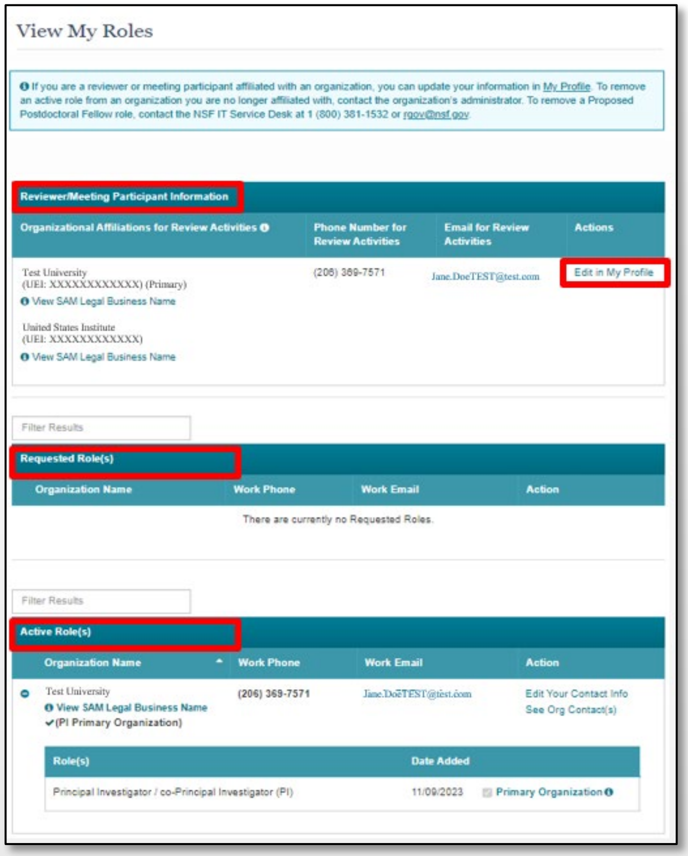


Figure 1

How do I change organization contact information if I am a reviewer?

- Click **"Edit in My Profile"** in the Action column located on the right side of the Reviewer/Meeting Participant Information table. (Figure 1)
- You will be navigated to the **"Contact Information"** tab on My Profile where you can edit your preferred email address or phone number for review/meeting activities. You can update your organizational affiliation(s) on the **"Academic/Professional Information"** tab on My Profile. *Please see the View and Edit My NSF Reviewer Account Profile Information job aid for detailed instructions on accessing and updating My Profile.*

How do I change organization contact information if I am a PI, co-PI, or Proposed Postdoctoral Fellow or I have another organizational-approved role?

- Please see the following job aids for detailed instructions on viewing requested and active organizational roles and making updates:
  - *View My Organizational Roles – Requested Roles*
  - *View My Organization Roles – Active Roles*

Accessing the Reviews, Panels, and Other Meetings Page

Accessing the Reviews, Panels, and Other Meetings Page

Once you have an NSF account ~~and~~ completed the one-time process to provide your reviewer profile information, and have been invited by NSF program staff to participate in review activities, you can access your assigned proposals, panels, or meetings via the Reviews, Panels, and Other Meetings page. Follow the step-by-step instructions below to access the assigned proposals, panels or meetings for your review.

Access the Reviews, Panels, and Other Meetings Page through Research.gov Homepage (Not Signed into Research.gov)

- Open Research.gov
- Scroll down the page to "Reviews Panels & Other Meetings" (Figure 1)
- Click the "**Reviews, Panels and Other & Meetings**" link. You will be redirected to the Research.gov sign-in page. Upon successful sign-in to Research.gov, you will be re-directed to the "Reviews, Panels, and Other Meetings" page (Figure 2).

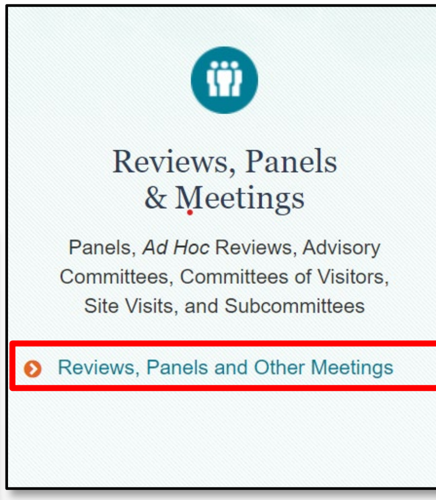
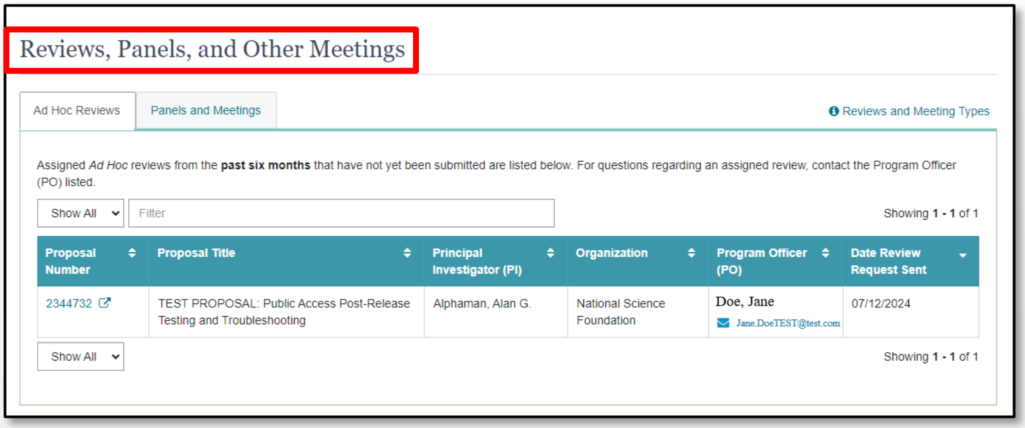


Figure 1



Proposal Number	Proposal Title	Principal Investigator (PI)	Organization	Program Officer (PO)	Date Review Request Sent
2344732	TEST PROPOSAL: Public Access Post-Release Testing and Troubleshooting	Alphaman, Alan G.	National Science Foundation	Doe, Jane Jane.DoeTEST@test.com	07/12/2024

Figure 2

Access the Reviews, Panels, and Other Meetings Page through Research.gov Homepage (Signed into Research.gov)

- Open Research.gov
- Click **"Sign In"** located at the top right of the screen. (Figure 3)
- Click **"Continue to Research.gov Sign In Options"**, enter your credentials (e.g., NSF ID and password) and sign in using your selected security method (i.e., multifactor authentication method) (Figure 4). If you have not set up your preferred security method yet, you will be prompted to complete this activity to access your account. *For more information on setting up your preferred security method including how-to guides, video tutorials, and FAQs, visit the About Signing Into Research.gov page.*
- Once you've successfully signed in using your preferred security method, click the "**Reviews, Panels, and Other Meetings**" link on the "Reviews & Meetings" tile. (Figure 5)

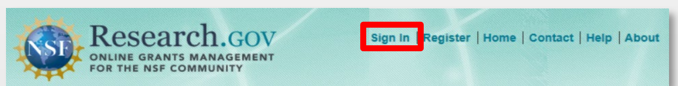


Figure 3

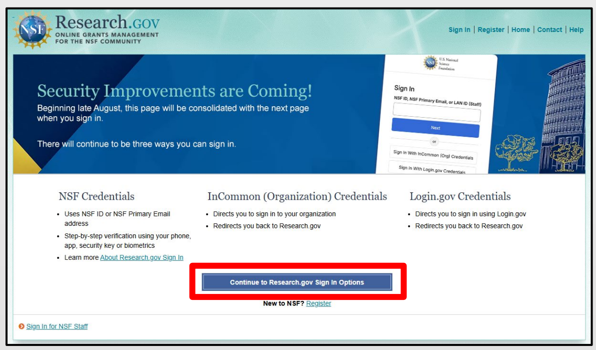


Figure 4

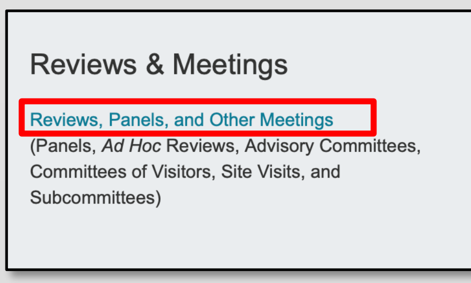


Figure 5

***Important Note**: You can also access the "Reviews, Panels, and Other Meetings" page by clicking the "Reviews, Panels, and Other Meetings" link under "Reviews and Meetings" on the top navigation bar.* (Figure 6)

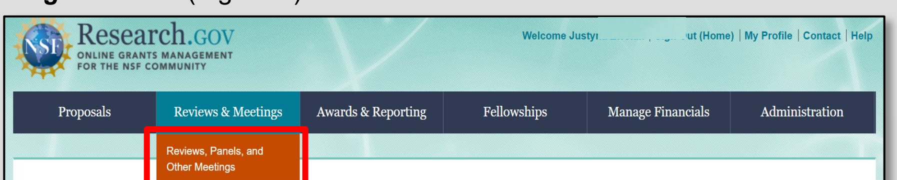


Figure 6

Using the Reviews, Panels, and Other Meetings Page to Access Reviewer Assignments

Using the Reviews, Panels, and Other Meetings Page to Access Reviewer Assignments

Reviewers use the “Reviews, Panels, and Other Meetings” page to access *ad hoc* proposals assigned for review and to access panels and meetings they have been invited to participate in by NSF program staff. Refer to the “Accessing the Reviews, Panels, and Other Meetings Page” job aid for more information on how to access this page within Research.gov.

View Assigned *Ad Hoc* Reviews

- From the Reviews tab, click the proposal number in the **Proposal Number** column for the proposal you want to review. (Figure 1)
- The selected proposal assigned for review will display for the reviewer to complete review activities.

***Important Note*: The “Reviews” table will only populate and display active reviews from the past six months, if the reviewer has linked their account by using completed the one-time process to provide their reviewer profile information. See View or Edit My NSF Reviewer Account Profile Information to link your reviewer profile to your account in Research.gov.**

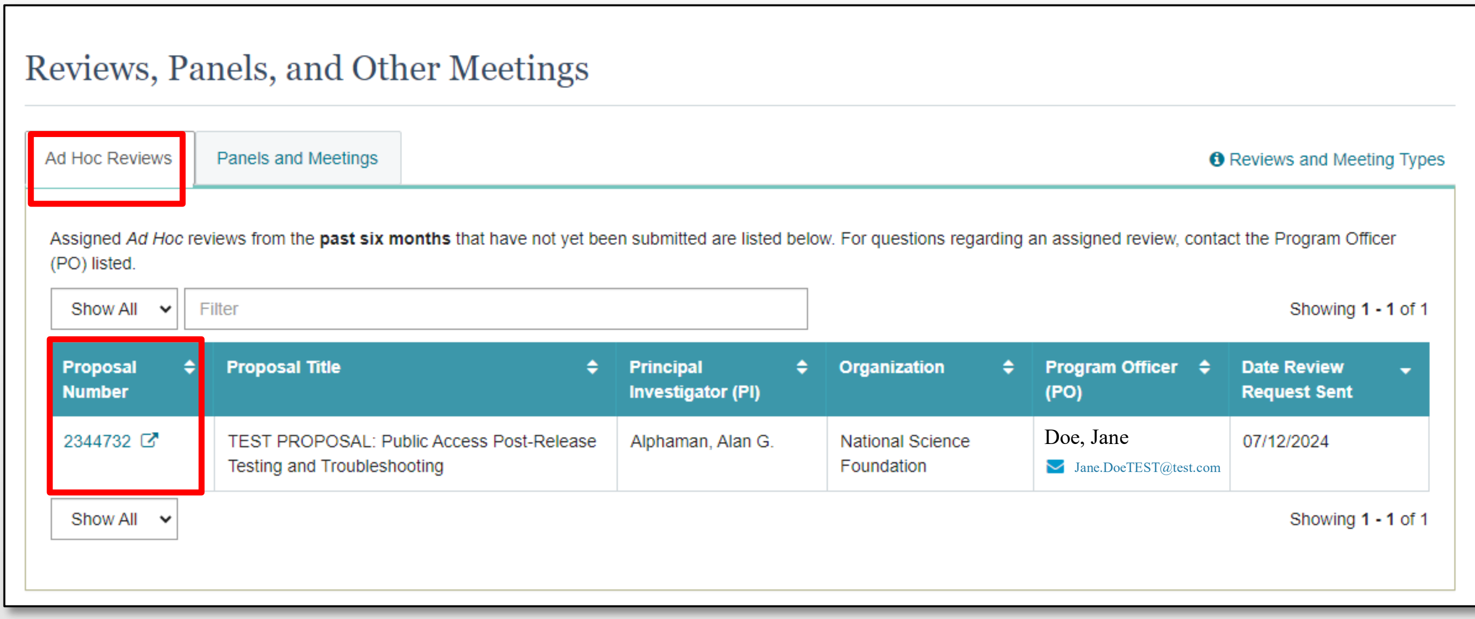


Figure 1

Using the Reviews, Panels, and Other Meetings Page to Access Reviewer Assignments (continued)

View Assigned Panels and Meetings

- From the Panels and Meetings tab, click the meeting ID in the **Meeting ID** column for the panel or meeting you have been invited to participate in by NSF program staff. (Figure 2)
- The meeting details page will display meeting information, steps to complete for the meeting, and links to helpful resources.
- ***Important Note*: *Panels and meetings will only display and be listed for one year following the meeting, if the reviewer has linked their account by using the one-time process to provide their reviewer profile information.***

Reviews, Panels, and Other Meetings

Ad Hoc Reviews | Panels and Meetings | Reviews and Meeting Types

Select a Meeting ID below to register or sign-in for the meeting, prepare your review, or submit information for travel or reimbursement. Meetings are listed for **one year** following the meeting. For questions regarding a meeting, contact the Program Officer (PO) listed.

Show All | All Meetings | Filter | Showing **1** - **5** of 5

Meeting ID	Meeting Name	Program Officer (PO)	Meeting Status	Meeting Date(s)
P242684	Panel: July Account Management Release Validation- 7/15	Doe, John John_DoeTEST@test.com	Past	07/15/2024 - 08/03/2024
V242679	Site Visit: Site Visit Test	Doe, Jane Jane_DoeTEST@test.com	Past	07/12/2024 - 07/31/2024
P242687	Panel: Acpt_smoke test _0715_1	Smith, John John_SmithTEST@test.com	Past	07/15/2024 - 07/18/2024
P242636	Panel: PES June Release Validation - 06/24	Apple, Sarah Sarah_AppleTEST@test.com	Past	06/24/2024 - 07/22/2024
C242675	Committee of Visitors: July COV	Blueberry, George George_BlueberryTEST@test.com	Past	07/15/2024 - 07/19/2024

Show All | Showing **1** - **5** of 5

Figure 2

Reviews and meetings only appear for users who have received notice from NSF to provide their information in Research.gov. If you *have* received a request from NSF, Provide Reviewer Profile Information to see available reviews and meetings.

Figure 3

View the Meetings Details Page

- After clicking the Meeting ID from the Panels and Meetings tab, a **Meeting Details** page will display according to the meeting type (panel, site visit, committee of visitors, advisory committee, and subcommittee). (Figure 4)
  - Each page type will include meeting details such as meeting name, meeting type, meeting date(s), program officer information, and meeting status (active, upcoming, or past).
  - Each page type will include a “Helpful Links” section and a “Steps for the Meeting” section containing links.

***Important Note*: Links under “Steps for the Meeting” are meeting type-specific and will display according to meeting type (panel, site visit, committee of visitors, advisory committee or subcommittee).**

- ***Clicking the links for Travel and Reimbursement, Meeting Attendance Check In, and the Proposal Evaluation System (panels and sites visits only) will automatically navigate you to the appropriate page without having to enter additional credentials for access.***
- ***Committee of visitors (COV) meeting participants will still require an NSF program-provided password to access the COV functionality.***

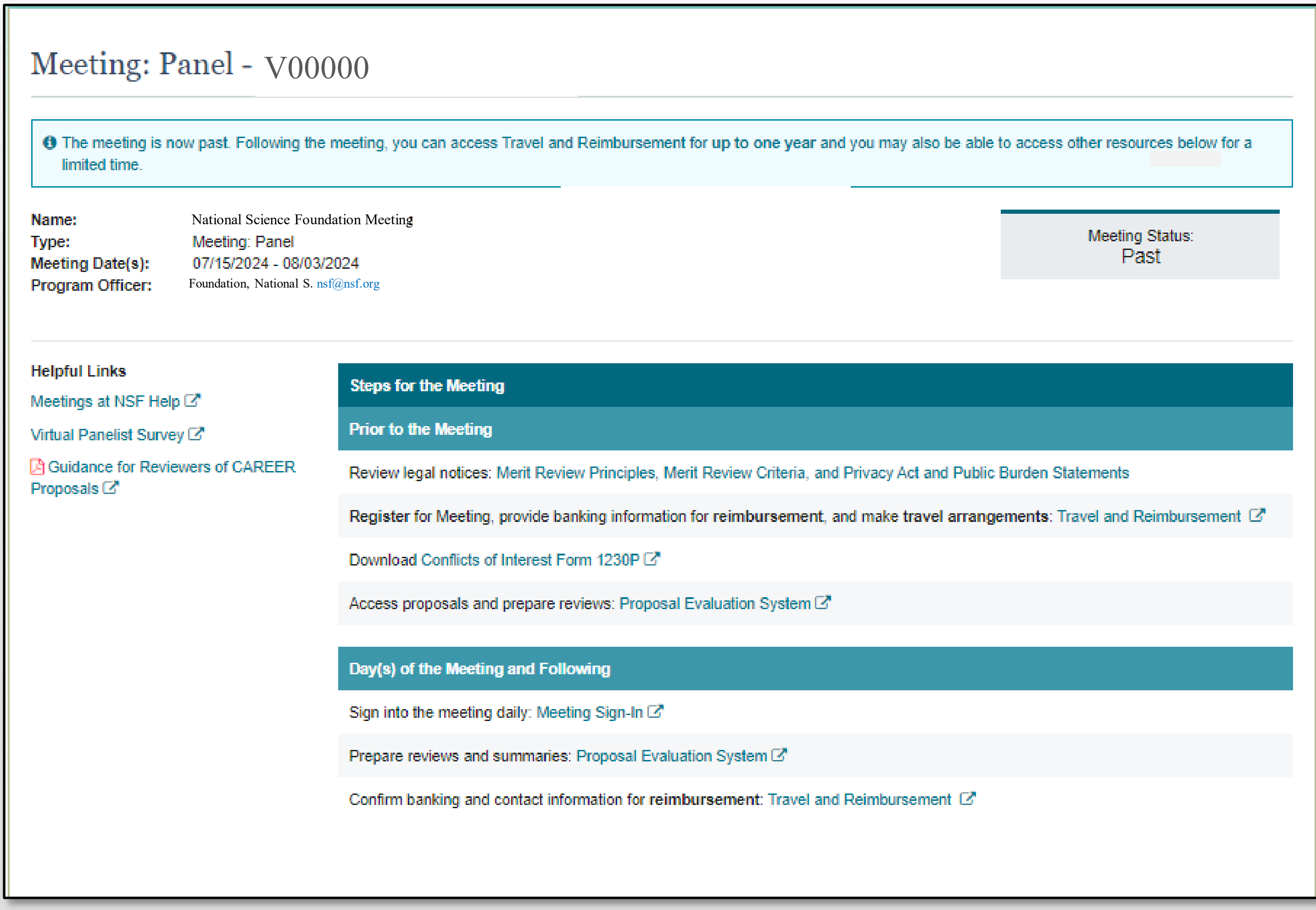


Figure 4

Using the Reviews, Panels, and Other Meetings Page to Access Reviewer Assignments (continued)

View the Reviews and Meeting Type Descriptions

- To view the reviews and meeting type descriptions, click the **Reviews and Meeting Types** link on the Reviews, Panels, and Other Meetings page. (Figure 5)
- A Reviews and Meeting Types message will display with descriptions. (Figure 6)

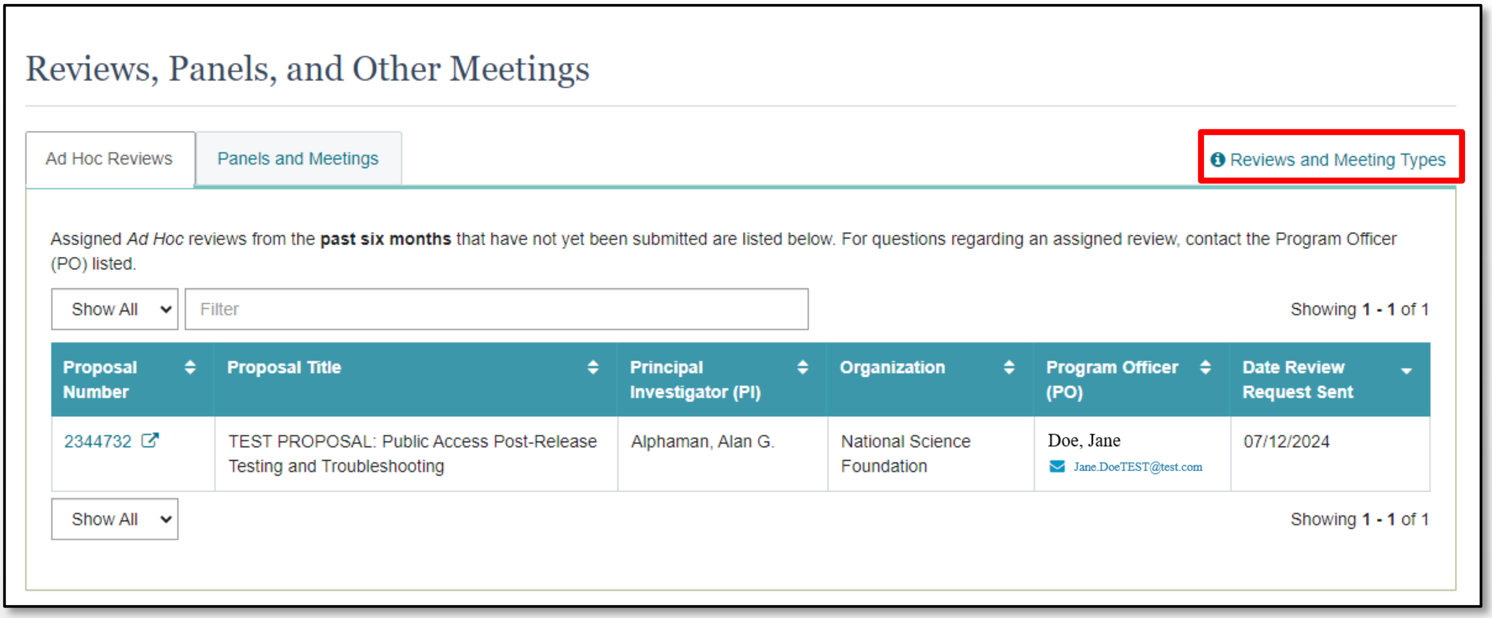


Figure 5

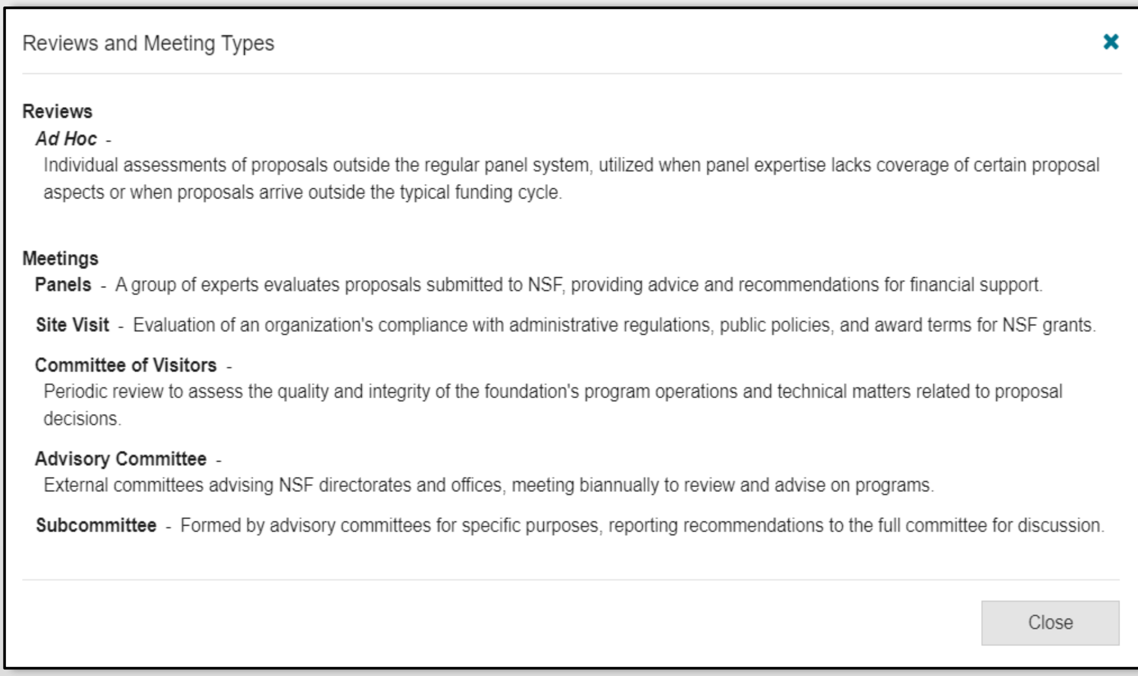


Figure 6