

# Register for an NSF Account to Begin Using FastLane and Research.gov



## Register for an NSF Account to Begin Using FastLane and Research.gov

To submit proposals to the National Science Foundation (NSF) and conduct other award-related activities using NSF systems, you must have an NSF ID. You may only have one NSF ID. This ID is a unique numerical identifier assigned to users by NSF through the registration process outlined below. The NSF ID is yours for you to use no matter your affiliation(s) in the future. Follow the step-by-step process to create a new NSF account.

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

- Access the <u>NSF ID Lookup</u> page to search for an existing NSF account.
- If you forgot your password for an established NSF account, <u>click</u> <u>here</u> to retrieve it. 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 <u>Research.Gov</u> homepage. Click here for detailed information on "My Profile" functions.
- If you do not have an existing NSF account, proceed to Step 2.

#### Step 2: Access the Account Registration page

- Open <u>Research.Gov</u>
- Click "Register" located at the top of the screen. (Figure 1)

#### Step 3: Create a new NSF account

• Input the requested account registration information. (Figure 2)

<u>Important Note</u>: Your primary email address will be used for NSF account notifications including password resets. Please make sure you have ongoing access to this email account (e.g., a Gmail address). It is critical that you have continued access <u>to</u> this email account, even if you were to ever change organizations.

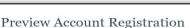
- Check the box to confirm that you are at least 13 years of age. (Figure 2)
- Click "Save & Preview". (Figure 2)
- Verify that your account registration information is correct on the Preview Account Registration screen
- If you need to update your account registration information, select the "Edit" button to return to the previous screen.
- Check the box to confirm you are not a robot and click "Submit". (Figure 3)
- You will receive an Account Registration Confirmation on the screen. (Figure 4)
- Check the primary email account that you just used for two messages: one containing your new NSF ID and another containing your temporary password.
- Click "Sign In" on <u>Research.Gov</u> and enter your new NSF ID and temporary password. (Figure 1)
- Follow the instructions to change your temporary password.
- · You have successfully registered for a new NSF account!

#### Step 4: Add a New Role

 Now that you have an NSF account, you can add roles to your account profile. <u>Click here</u> for detailed instructions.

#### <u>Important Note:</u> GRFP Applicants and Fellows do not need a role. GRFP Account Management training resources including guides and FAQs are available <u>here</u>

				Figure
Account Re	gistration			
NSF Proposal & Av Forgot/Look Up your		APPG) specifies that each individual user of N	ISF systems should not have more than	one NSF ID (Chapter I.G.4, NSF
Required Fields				
Prefix	* First Name	Middle Name/Initial	* Last Name	Suffix
Select Prefix 🔻				Select Suffix
Alternate Name(s) Nic	kname, maiden name, etc.			
Primary Email () For	NSF account password recovery	* Confirm Primary Email		
Secondary Email 🕄		Confirm Secondary Ema	ell .	
ORCID iD 😳 16-digits is	8. 1234-1234-1234-1234	Phone Number		Extension
) * I confirm that I am	at least 13 years of age.			





Account Registration Confirmation
Your account has been successfully created.
An activation email was sent to: Claude7575@1.com
Your NSF ID is: 000900873
Activation of the account is required to sign in. To activate your account, please go to your email to complete the registration process and obtain your temporary password.

Additional guidance including FAQs and instructional videos can be found on the Research.gov <u>About Account Management</u>, page. Account management questions may be directed to the NSF IT Help Desk at 1-800-381-1532 or <u>rgov@nsf.gov</u>.

Figure 4



### Working at Multiple Organizations or Moving to Another Organization



## Working at Multiple Organizations or Moving to Another Organization

It is National Science Foundation (NSF) policy that only one NSF account is allowed per user. If you already have an NSF account, you MAY 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.
  - For more information about adding a role from a new organization or adding the Proposed Postdoctoral Fellow role, <u>click here</u>.
- 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, <u>click here</u>.
- If you are leaving an organization, make sure the primary 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, <u>click here</u>.

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

- Click "Sign In" located at the top right of <u>Research.Gov</u> page.
- Enter your credentials (e.g., NSF ID and password) and click "Sign In".
- · Click "My Profile" located at the top right of the screen.
- Click "Add 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)

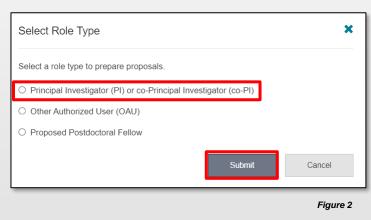
#### **Step 1: Find Organization**

- 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 may select the SAM UEI associated with your existing organization from the dropdown menu.
- Verify the correct organization is displayed and click "Next". (Figure 3)

**Note:** For more information about the SAM UEIs, please <u>click here</u> or contact your Sponsored Projects Office (SPO).



Figure 1



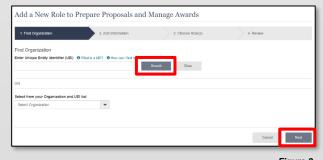


Figure 3



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

#### **Step 2: Add Information**

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

#### **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>: Your Demographic Information will not be shared with the listed Organizational Contacts when they review and approve your role request.



#### **Helpful Tips**

- Your primary email address is used for notifications about your NSF account such as password resets.
- 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 prepopulated if you already have a Principal Investigator (PI) role at another organization. If you update this section, the change will be reflected in your PI role at all organizations.
- The Demographic Information section will be prepopulated 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 approved PI role and within the "Demographic Information" tab in My Profile.
- By default, the latest PI role will be set to primary.

Add a New Role to Prepare	Proposals and Manage Awards	
1. Find Organization 🖌 💦 2	2. Add Information 3. Choose Role(s)	4. Review
Add Information		
he contect information will be used for all communicat	tions when performing in approved roles for this organization	
Required		
four Contact Details		
Work Phone Number	* Work Email O	
(123) 450-789	Select Work Email	
four Degree Information		
he degree information entered here will be used to po	pulses the printed Cover Sheet of your proposals to NSF.	
Highwat Degree Type	* Degree Year	
AS - Associate in Science	▼ 2017 ▼	
four Work Address		
Country		
Select Country 💌		
Street Address	Street Address (Line 2)	Department Name
Chy	* Scator	* Postal Code
	Sedect State 🗢	
Gander (Please select cos)	nities as everyone else. For more information, read the Privacy Act 5 * Ethnicity (Please select one)	CONCERT.
Main	<ul> <li>Hispanic or Latino •</li> <li>Not Hispanic or Latino</li> </ul>	
Do not with to provide	<ul> <li>Not Happing or Latino</li> <li>Do not with to provide</li> </ul>	
Race (Please select all that apply)	* Do you have a deability? (Please select	i nome i
Cace Definitions	O'What is considered a disability?	
American Indian or Alarka Native	<ul> <li>Nec.</li> </ul>	
: Atlan : Black or African American	<ul> <li>No</li> </ul>	
Native Havailan or Other Padfic Islander	Do not with to provide	
White		
Cither (Please specify)		
Do not with to provide		
		Canad Parvines New
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dd a New Role to Prepare I	Proposals and Manage Awards	

1. Find Organization 🗸	2. Add Information 🛩	3. Choose Role(s)		4. Review	
Choose Role(s)					
You will be registered for the follow	ing role: 0 What is this role?				
Principal Investigator/ co-Principal	Investigator (PI/co-PI)				
			Cancel	Previous	Next

1. Find Organization 🛩	2. Add information 🛩	3. Choose Role(s) 🗸	4. Review	
Review				
rour Contact Details				
Organization Name: Michigan State	University			
AM Legal Business Name: MICHIC				
tole: Principal Investigator / co-Princi				
Nork Email: steve@pacific-research. Nork Phone Number: (090) 909-090				
YOR Phone Number. (050) 505-050	13			
rour Degree Information				
lighest Degree Type: AS - Associate	e in Science			
Degree Year: 2017				
four Work Address				
Country: United States				
street Address: 1234 Street Address	1			
Street Address (Line 2):				
Department Name: City: Alexandria				
sity: Alexandria State: California				
Postal Code: 90036				
rour Demographic Informatio	n			
Bender: Male Race: White				
Ethnicity: Not Hispanic or Latino				
lo you have a disability?: No				
			Cancel Previous	Submit
				Figure
id a New Role to F	Prepare Proposals and	Manage Awards		
Success - your request has been to	orwarded to the organization contact(s) bei	ow. Check the status of this request on the $\underline{V}$	ew My Roles page.	
ganization Contact(s)		Organization Contact Type		
riolo, lan		Administrator		
IGGS, VICTOR B		SAM POC		
ALE-MORRIS, SHIRLEE K		SAM POC		
		SAM POC		
ORRIS, SHIRLEE K		DAIL TOO		
tinue to My Profile >		SAIL O		



### **Navigating the Account Management Links**



Research.gov

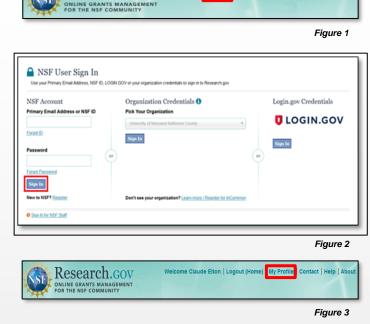
The Account Management system includes pages for Administrators to manage user and organization information and pages for users to self-manage their roles and profile information. Access these pages and the updated functionality by signing in to <u>Research.Gov</u> and clicking on the "My Profile" link in the top right.

#### Access the left navigation bar in Account Management

- Open <u>Research.Gov</u>
- Click "Sign In" located at the top right of the screen. (Figure 1)
- Enter your credentials (e.g., NSF ID and password) and click
   "Sign In". (Figure 2)
- Click on "**My Profile**" located at the top right of the screen. (Figure 3)

<u>Important Note</u>: NSF enabled <u>Login.Gov</u> to sign in to Research.gov in January 2022. Use of Login.gov to sign in to Research.gov is optional, and the research community is still able to use their NSF Account or their university-issued credentials through the InCommon integration to sign in to Research.gov. A user who has an NSF account linked to their organizational credentials or Login.gov credentials available on the "NSF User Sign In" page (Figure 2) will also be navigated to the "My **Profile**" menu tab after signing in to Research.gov This guide provides instructions for only the "NSF Account" sign in option.

#### Where do the left navigation bar links take me?



Sign In

Account Management Link	Functionality
My Profile / View/Edit My Profile	View and edit your profile, demographic and academic information
Change Password	Change your Research.gov and FastLane password
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're an Administrator of an organization. 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
Proposals, Awards, & Status	Access the FastLane Proposals, Awards, & Status page. This page will open in a new tab.
Research Administration	Access the FastLane Research Administration page. This page will open in a new tab.



# View and Edit My NSF Account Profile Information



Hide Menu My Profile

My Roles

View/Edit Profile Change Password

View My Roles Add a New Role My Organizations View My Users Quick Links

About Account Management F Proposals, Awards & Status F Research Administration

## View and Edit My NSF Account Profile Information

Once you have a National Science Foundation (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.

#### Step 1: Access the View/Edit My Profile page

- Open <u>Research.Gov</u>
- Click "Sign In" located at the top right of the screen. (Figure 1)
- Enter your credentials (e.g., NSF ID and password) and click "Sign In". (Figure 2)
- Click "My Profile" from the top right of the screen. (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)

#### Step 2: Edit your Contact Information

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

<u>Important Note</u>: If you change your primary email address (i.e., the email address used to create your NSF account), NSF will send you a verification email. You must verify the updated email address within four hours or your account email address will revert back to your last verified email address.



Research.gov	Welcome Claude Elton   Logout (Home)	My Profile Contact   Help   About
		Figure 3

My Profile

r NSF ID or

			Contact Informat	ion Demographic Info	ma
			This is your informati do so on the View M	ion for your NSF account. If you ne y Roles page.	ed
			* Required		
Demographic Information NSF account. If you need to change	Professional Information	your organizations, you can	* Primary Email () testenv@testing.co	P Nickname, Malden Name, etc.) For NSF Account Password Recover om	
			Phone Number (503) 595-3970 Save	Cancel	
		Figure 5			
	NSF account. If you need to chang	NSF account. If you need to change your contact information at one of e.	NSF account. If you need to change your contact information at one of your organizations, you can ge	Demographic Information       Professional Information         NSF account. If you need to change your contact information at one of your organizations, you can get       Select Suffix         ount Password Recovery)       Attenate Name(s)         Unternative Recovery       Select Suffix	Demographic Information       Professional Information         NSF account. If you need to change your contact information at one of your organizations, you can get       First Name       Middle N         sunt Password Recovery)       Attende to the second system of t

Figure 6

Figure 2

tact information at one of your organizations, you car

Last Nam

Figure 4



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.

Additional guidance including FAQs and instructional videos can be found on the Research.gov <u>About Account Management</u>. page. Account management questions may be directed to the NSF IT Help Desk at 1-800-381-1532 or <u>rgov@nsf.gov</u>.

Version 1.8, Updated October 21, 2022



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

#### **Step 3: Edit your Demographic Information**

- Click "Edit" at the bottom of the Demographic Information tab in the My Profile page. (Figure 7)
- Enter your demographic information for Gender, Race, Ethnicity and Disability status and click "Save." (Figure 8)

#### Important Notes:

My Profile For NSF ID 000700556

Name

Nathan Marticke Alternate Name(s) None Provided

None Provided Phone Number (816) 584-6844

Edit

Contact Information

nathan marticke@park.edu Secondary Email ()

do so on the View My Roles page

Primary Email () (For NSF Account Password Recovery)

- Submission of the requested demographic information is required. Until responses to all demographic questions are provided, the "Save" button will be disabled. (Figure 8)
- The "Other" option for Race question will prompt a free text field for entry. (Figure 8)
- Demographic Information is only displayed for Principal Investigators (PIs). Users without a PI role will not have the Demographic Information tab within "My Profile". (Figure 9)

Professional Information

This is your information for your NSF account. If you need to change your contact information at one of your organizations, you can

to gauge whether our programs and other one regardless of demographic category; and to d access to programs, meetings, vacancies, and nation, read the Privacy Act Statement.

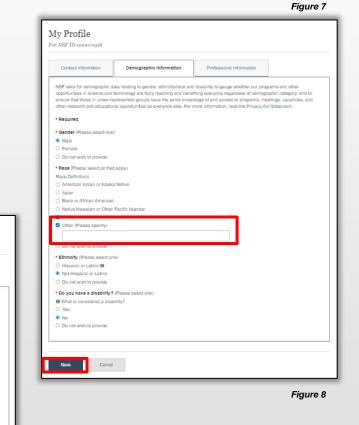


Figure 9



#### **Step 4: Edit your Professional Information**

Account

Management

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

			Г
Contact Information	Demographic Information	Professional Information	
DRCID ID ()			
None Provided			



### 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 on page 9)
- Within the **Contact Information** tab in the **My Profile** page, click "**Pending Your Verification**" located to the right of the primary email address. (Figure 6)
- Select "Click here to Resend the verification link email." (Figure 7)
- A new verification email will be sent to your pending primary email address (i.e., the updated email address entered in Step 2 on Page 9).

<u>Important Note</u>: NSF will send you a verification email. You must verify the updated email address within four hours or your account email address will revert back to your last verified email address.

*If the four 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 on page 9)* 

#### How do I change my password?

- Select the "View/Edit My Profile" option. (Refer to Step 1 on page 9)
- Click "Change Password" located in the left navigation bar. (Figure 6)
- Update your password and click "Change Password". (Figure 8)
- Once your password is successfully changed, you will receive a password change notification on the screen. (Figure 9)
- You have successfully changed your password!
- Click "Continue to Research.gov" to keep working. (Figure 9)



#### **Helpful Tip**

Passwords are valid for 365 days before required renewal.

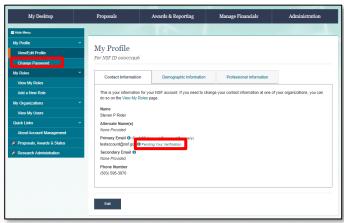




Figure 7



Change Password For Research.gov and FastLane	
1 Enter your temporary passwo	rd as received to change your password.
Enter your current password and then	create a new password.
NSF ID	
Current Password	Your password needs to:
	O Have at least 8, but no more than 20 characters
New Password	Avoid using spaces
	Meet 3 of the 4 rules:
Confirm Password	At least one lowercase letter
Confirm Password	At least one capital letter
	At least one number
	At least one of the permitted special characters # & % ! @ ( )
Change Password Cancel	Note: you cannot re-use your last 6 passwords
	Figure 8
Change Password	
For Research.gov and FastLane	
Success - Password Changed	1
Your password has been successfully	changed in Research.gov and FastLane.
In the future, if you need to change yo	ur password, click the "My Profile" link on the top right of the page and select "Change Password".
Continue to Research.gov Cont	linue to FastLane

Note: Most FastLane functions can be reached directly from Research.gov, without the need to sign in again

Figure 9



### **Register a New Organization**



Organizations must be registered with the National Science Foundation (NSF) to submit proposals using NSF's systems or via Grants.gov. Before a new organization can register with NSF, it must first be registered in the System for Award Management (SAM) at <u>Sam.Gov</u> and have a Unique Entity Identifier (UEI). Note that completion of the SAM registration process may take two weeks. Please check <u>Sam.Gov</u> for information about any delays.

Follow the step-by-step process below to register a new organization with NSF.

#### How do I register a new organization with NSF?

- Open <u>Research.Gov</u>
- Click "Sign In" located at the top right of the screen.
- Enter your credentials (e.g., NSF ID and password) and click "Sign In".
- 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 you need help registering in the System for Award Management (SAM), go to <u>Sam.Gov</u>.
  - Note that completion of the SAM registration process may take two weeks. Please check Sam.Gov for information about any delays.

Welcome to the Add a New Role page. Here you can: Request one or more user roles Register a new organization by clicking on the "Add Organizat Get more information about a role category by clicking on the	
For help and more information go to the <u>About Account Managemen</u>	page.
elect one to work on proposal and award activitie	5.
Prepare Proposals and Manage Awards	Add and Manage Organizations
Principal Investigator (PI), co-Principal Investigator (co-PI), Proposed Postdoctoral Fellow, Other Authorized User (OAU)	Administrator (Admin), Authorized Organizational Representative (AOR), Sponsored Projects Officer (SPO) View Only User
Add Investigator or Authorized User Role	Add Organizational Role
PI/co-PI, Postdoctoral Fellow and OAU role details	Organizational role details
Manage Financials in Award Cash Management Service (ACM\$)	Register as a Graduate Research Fellowship Program (GRFP) Official
Awardee Preparer, Awardee Certifier, Awardee Financial Representative	Coordinating Official (CO), Alternate Coordinating Officia (Alt. CO), Financial Official (FO)
Add Financial Role	Add GRFP Official Role
Einancial role details	GREP role details

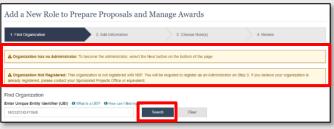


Figure 2



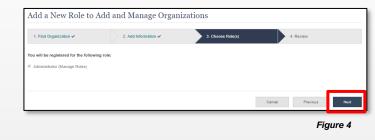
If a new organization is registered with NSF without an Administrator, the first user to request a role will become the organization's first Administrator.



#### How do I register a new organization with NSF?

- 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 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)

he contact information will be used for all communications when performing in approved roles for this organization Required Your Contact Details Work Room Number • Work Email • Select Work Email • Organization Details Organization Short Name • Organization Type • • Time Zone • Select Type • • Organization Email • Organization Phone Number • Organization Fax Number • Organization Email	1. Find Organization 🗸	2. Add Information 3. Ch	ioose Role(s)	4. Review	
Vor Contact Details  Work Email  Select Viols Email  Organization Details  Organization Short Name  Organization Type   Time Zone 0  Select Organization Type  Organization Phone Number  Organization Fas Number  Organization Fas Number  Organization Email	Add Information				
Vor Contact Details  Work Email  Select Viols Email  Organization Details  Organization Short Name  Organization Type   Time Zone 0  Select Organization Type  Organization Phone Number  Organization Fas Number  Organization Fas Number  Organization Email	The contact information will be used for all o	communications when performing in approved roles for this org	ganization		
Crganization Details  Organization Short Name  Organization Type	* Required				
*Work Phone Number *Work Email ©  Select Wink Email ©  Crganization Details *Organization Short Name *Organization Type * *Time Zone 0 Select Organization Type * Select Time Zone  Organization Phone Number Organization Fax Number *Organization Email					
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Organization Details  Organization Short Name  Organization Type					
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* Organization Short Name * Organization Type * Time Zone @ Select Organization Type * Select Time Zone * * Organization Phone Number Organization Fax Number * Organization Email					
Select Organization Type     Select Time Zone     Organization Phone Number     Organization Fax Number     Organization Fax Number	Organization Details				
Organization Phone Number     Organization Fax Number     Organization Fax Number	* Organization Short Name	* Organization Type		* Time Zone 0	
		Select Organization Type	-	Select Time Zone	-
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	* Organization Phone Number	Organization Fax Number		organization zinian	
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Cancel Previous Net	* Organization Phone Number	Organization Fax Number			



1. Find Organization 🗸	2. Add Information 🗸	3. Choose Role(s) 🗸	4. Review	
Review				
Organization Name:	SUNY College at Old Westbury			
SAM Legal Business Name:	RESEARCH FOUNDATION FOR THE STATE UNIV	VERSITY OF NEW YORK, THE		
Role(s):	Administrator			
Work Email:	gblock@associates.nsf.gov			
Work Phone Number:	(123) 867-5309			
			Cancel Previous	Submit

Figure 5



Figure 6



Add a New Role



### Add a New Role

To work on proposal and award activities on National Science Foundation (NSF) systems, a user must have an organizationapproved role at an organization registered with NSF. To request a role from your organization, you must sign in to <u>Research.Gov</u> 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.

Add a New Role	
For NSF ID 000085032	
Welcome to the Add a New Role page. Here you can:         Request one or more user roles         Register a new organization by clicking on the "Add Organiz".         Get more information abut a role category by clicking on the         For help and more information go to the <u>About Account Management</u> Select one to work on proposal and award activities	e role details link below each button <u>nt</u> page.
Prepare Proposals and Manage Awards	Add and Manage Organizations
Principal Investigator (PI), co-Principal Investigator (co-PI), Proposed Postdoctoral Fellow, Other Authorized User (OAU)	Administrator (Admin), Authorized Organizational Representative (AOR), Sponsored Projects Officer (SPO), View Only User
Add Investigator or Authorized User Role O Pilco-Pil, Postdoctoral Fellow and OAU role details	Add Organizational Role O Grganizational role details
Manage Financials in Award Cash Management Service (ACM\$)	Register as a Graduate Research Fellowship Program (GRFP) Official
Awardee Preparer, Awardee Certifier, Awardee Financial Representative	Coordinating Official (CO), Alternate Coordinating Official (Alt. CO), Financial Official (FO)
Add Financial Role O Financial role details	Add GRFP Official Role O GRFP role details

#### Figure 1

Figure 1 shows the four 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 role(s)	To perform these functions	Select this "Add Role" Button
<ul> <li>Principal Investigator (PI)</li> <li>Co-Principal Investigator (co-PI)</li> <li>Proposed Postdoctoral Fellow</li> </ul>	<ul><li> Prepare proposals</li><li> Manage awards</li></ul>	Add Investigator or Authorized User Role
<ul> <li>Administrator</li> <li>Sponsored Projects Officer (SPO)</li> <li>Authorized Organizational Representative (AOR)</li> <li>View Only</li> </ul>	<ul> <li>Add a new organization</li> <li>Approve/disapprove roles</li> <li>Assign user roles</li> <li>Add/remove users</li> </ul>	Add Organizational Role
<ul> <li>Awardee Preparer</li> <li>Awardee Certifier</li> <li>Awardee Financial Representative</li> </ul>	<ul> <li>Prepare and manage financials in Award Cash Management Service (ACM\$)</li> </ul>	Add Financial Role
<ul> <li><u>Graduate Research Fellowship Program (GRFP)</u> <u>Coordinating Official (CO)</u></li> <li>GRFP Alternate Coordinating Official (Alt. CO)</li> <li>GRFP Financial Official (FO)</li> </ul>	Manage GRFP functions	Add GRFP Official Role
Other Authorized User (OAU)	Assist a PI with proposal preparation	Add Investigator or Authorized User Role

Additional guidance including FAQs and instructional videos can be found on the Research.gov <u>About Account Management</u>. page. Account management questions may be directed to the NSF IT Help Desk at 1-800-381-1532 or <u>rgov@nsf.gov</u>.

Version 1.8, Updated October 21, 2022



#### **Role Request Wizard Steps**

No matter the role you choose to add, the same four-step process is followed.

#### **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 dropdown menu to select the UEI associated with your NSF-registered organization.
- Verify the correct organization is displayed in the results section and click "**Next**". (Figure 2)

**Note:** For more information about SAM UEIs, please <u>click here</u> or contact your Sponsored Projects Office (SPO).

 If your organization is not registered in the System for Award Management (SAM) go to <u>Sam.Gov</u>. Note that completion of the SAM registration process may take two weeks. Please check <u>Sam.Gov</u> for information about any delays.

#### **Step 2: Add Information**

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

#### Notes:

 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: <u>Add a New Role –</u> <u>Principal Investigator</u> and. <u>Add a New Role –</u> <u>Proposed Postdoctoral Fellow.</u> 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.

Add a New Role to	Add and Manage Orga	nizations		
1. Find Organization	2. Add Information	3. Choose Role(s)	4. Review	
Find Organization				
Enter Unique Entity Identifier (UEI)	What is a UEI? O How can I find my UEI?	Search Clear		
OR				
Select from your Organization and	UEI list			
Select Organization	-			
			Cancel	Next
			Fic	gure 2

Add a New Role to Add ar	nd Mai	nage Organiza	tion	5				
1. Find Organization 🗸	2. Add Inf	ormation		3. Choose Role(s)		4. Review		
A Existing role information: You currently have Please review the information for accuracy. If you								
Add Information	plastions who	an norforming in annround re	les for t	his occasoization				
Required	Incationa win	in perioriting in approved to	103 101 1	ina organization				
Work Phone Number		* Work Email 0						
(202) 121-2222		icariolo@mit.edu	-					
					Cancel	Previous	Nex	
						F	igure 3	3



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. It is critical that you have continued access to this email account (e.g., a Gmail address), even if you change organizations.
- Your work email address is associated with all your roles <u>at a particular organization</u>. This email address is used for role request and approval notifications as well as for proposal and award related notifications.



#### Step 3: Choose Role(s)

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

**Note:** Depending on the selected role, please be aware that some corresponding 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.

1. Find Organization 🗸	2. Add Information 🗸	3. Choose Role(s)	4. Review	
Choose Role(s)				
Select all roles that apply. () What	are these roles?			
Administrator (Manage Roles)				
Authorized Organizational Repre	sentative - AOR (Submit Proposals)			
Sponsored Projects Officer - SPO	D (View/Edit Proposals)			
View Only (View Reports)				

#### **Step 4: Review and Submit**

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

1. Find Organization 🗸	2. Add Information 🗸	3. Choose Role(s) 🗸	4. Rev	<del>CW</del>
Review				
Organization Name:	SUNY College at Old Westbury			
SAM Legal Business Name:	RESEARCH FOUNDATION FOR THE STATE UN	NIVERSITY OF NEW YORK, THE		
Role(s):	Authorized Organizational Representative			
Work Email:	gblock@associates.nsf.gov			
Work Phone Number:	(123) 867-5309			

#### **Success**

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

Show 5 💌	showing 1-5 of 6 « < Prev 1 2 Nex
Organization Contact(s)	Organization Contact Type
Endres, Paul	Administrator
Sahin-Sariisik, Asli	Administrator
CARROLL, MAYLON	SAM POC
GOCH, ADAM	SAM POC
LIVADAS, JERRY	SAM POC
	showing 1-5 of 6 « < Prev 1 2 Nex

Figure 6



An email will be sent to the work email address you used to request a role on whether or not 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, to follow-up on your role request.



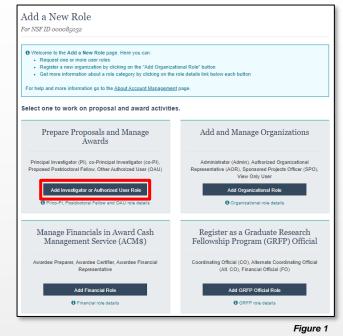
### Add a New Role - Principal Investigator PI/Co-PI

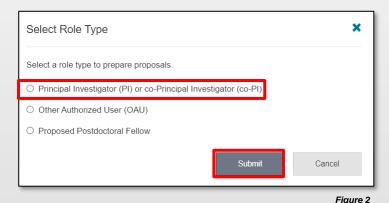


To work on proposal and award-related activities on National Science Foundation (NSF) systems, a Principal Investigator (PI)/ co-Principal Investigator (co-PI) must have the Investigator role at an organization. After requesting a role, your organization's Administrator will receive the request electronically to approve or disapprove it. To request a role, you need to sign in to <u>Research.Gov</u> 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 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)



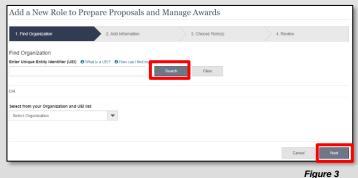


#### **Four-Step Role Wizard**

#### **Step 1: Find Organization**

- Enter the organization's Unique Entity Identifier (UEI) and click "Search" (Figure 3). If you already have an organizationapproved role at NSF you may select the UEI associated with your existing organization from the dropdown menu.
- Verify the correct organization is displayed in the results section and click "Next".

**Note:** For more information about SAM UEIs, please <u>click</u> <u>here</u> or contact your Sponsored Projects Office (SPO).



## NSE.

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

#### **Step 2: Add Information**

Account

Management

 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 a 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 prepopulated if you already have a Principal Investigator (PI) role at another organization. If you update this section, the change will be reflected in your PI role at all organizations.
- The Demographic Information section will be prepopulated 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 approved PI role and within the "Demographic Information" tab in My Profile.
- By default, the latest PI role will be set to primary.

		s and Manage Awards		
1. Find Organization 🛩	2. Add information	3. Choose Role(x)		A Review
Add Information				
The contect information will be used for all communic	ations when perfor	ning in approved roles for this organization		
Required				
Your Contact Details				
Work Phone Number	* Work 0	Inali 😐		
(123) 456-789	Select	Work Email		
Your Degree Information				
The degree information entered here will be used to p	opulate the printed	Cover Sheet of your proposals to NSF.		
Highest Degree Type	* Degree	That		
AS - Associate in Science	* 2017	-		
Your Work Address				
Select Country				
Street Address	Screek: A	ddrees (Line 2)	_	Department Name
Chy	1 Scene			* Postal Code
	Select	State 👻		
NGF axis for demographic data relating to gender, et benefiting everyone regardless of demographic categories	ony, and to ensure t	that those in under-represented groups have th	be same	knowledge of and access to programs, meetings,
	Sundies as everyon	* Ethnicity (Piesse select one)		
Gender (Please select crel)	tunites as everyon			
vacancies, and other research and educational oppo <b>Cander</b> (Please select one) Male Percele	tunities as everyon	<ul> <li>Ethnicity (Piezes asisct one)</li> <li>Hispanic or Latino (*)</li> <li>Not Hispanic or Latino</li> </ul>		
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Gender (Please select one)     Meie.     Revie.     Denote:     Denote:     Rece (Please select all that apply)	tunites as everyon	Districtly (Please select one)     Hispanic or Latino     Mol Hispanic or Latino     Do not wish to provide     Court wish to provide	ninci con	n)
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Lender, Privata Andrei zavaj      Marcia      Denosi Den		ExhetIdity (Planas assist cons)     Hispatic or Laten ()     More Happed or Laten     Do not with to provide     Do not with to provide     Do not with to provide     Cay part have a Alfaddity (? Planas a     Writer is considered a disability?     Tas.     No		n) David Facility <b>4</b>
Lender, Privata Andrei zavaj      Marcia      Denosi Den		ExhetIdity (Planas assist cons)     Hispatic or Laten ()     More Happed or Laten     Do not with to provide     Do not with to provide     Do not with to provide     Cay part have a Alfaddity (? Planas a     Writer is considered a disability?     Tas.     No		

1. Find Organization 🛩	2. Add Information 🗸	3. Choose Role(s)		4. Review	
Choose Role(s)					
You will be registered for the follo	owing role: () What is this role?				
Principal Investigator/ co-Principa	al Investigator (PI/co-PI)				
			Cancel	Previous	Next

1. Find Organization 🗸	2. Add Information 🛩	3. Choose Role(s) 🛩		4. Review	
Review					
our Contact Details					
rganization Name: Michigan State	e University				
AM Legal Business Name: MICH					
tole: Principal Investigator / co-Prin fork Email: steve@pacific-researcl					
fork Phone Number: (090) 909-09					
our Degree Information					
lighest Degree Type: AS - Associa	te in Science				
egree Year: 2017	ar ar ocarror				
lour Mark Addrosa					
four Work Address					
treet Address: 1234 Street Addres	15				
treet Address (Line 2):					
epartment Name:					
ity: Alexandria tate: California					
ostal Code: 90036					
our Demographic Informati					
ender: Male	on				
ace: White					
thnicity: Not Hispanic or Latino					
o you have a disability?: No					
			Cancel	Previous	Submit
			Cancer	Previous	Submit
					Figure
dd a New Role to I	Prepare Proposals and	Manage Awards			- <b></b>
		-			
Success - your request has been	n forwarded to the organization contact(s) be	ow. Check the status of this request on t	he <u>View My Roles</u> p	age.	
rganization Contact(s)		<ul> <li>Organization Contact Type</li> </ul>	,		
liyeh, Ali		Administrator			
olburn, Kimberly		Administrator			
LENN, CHANCE GLENN M		SAM POC			
NES, LATONIA		SAM POC			
BEMBE, BABATUNDE		SAM POC			



# Add a New Role – Proposed Postdoctoral Fellow



To work on proposal and award-related activities on National Science Foundation (NSF) systems, you must have an Investigator role even if you are working independently and are not affiliated with an organization. To request an Investigator role, you need to sign in to Research.Gov 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.

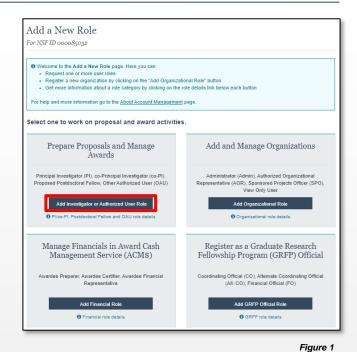
#### Access the Add a New Role page

- To request the 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 process will display. (Figure 3)

#### **Two-Step Process**

#### Step 1: Add Information

Input data into all required fields that have a red asterisk (\*) and click "Next". (Figure 3)



#### Û; **Helpful Tips**

- The third option in the "Prepare Proposals and Manage Awards" modal box (Figure 2) is disabled if you already have a Proposed Postdoctoral Fellow role. To view your current 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 prepopulated if you already have a Principal Investigator (PI) role at any other organization. If you update this section, the change will be reflected in your PI role at all organizations.
- The Demographic Information section will be prepopulated 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 approved PI role and within the "Demographic Information" tab in My Profile.
- By default, the latest PI role will be set to primary.

Select Role Type Select a role type to prepare proposals O Principal Investigator (PI) or co-Principal Investigator (co-PI) O Other Authorized User (OAU) O Proposed Postdoctoral Fellow Submit Cancel Add a Proposed Postdoctoral Fellow Role Figure 2 Work Phone Number Select Work Ema four Degree Informa Highest Degree Type Select Degree Type our Work Address City Gender (Please select one) Male \* Ethnicity (Please selec O Hispanic or Latino 0 Not Hispanic or Latino Do not wish to provide Race (Please select all that apply) Do you have a disability? (Please What is considered a disability? rican Indian or Alaska Native Asian Figure 3

Additional guidance including FAQs and instructional videos can be found on the Research.gov About Account Management. page. Account management questions may be directed to the NSF IT Help Desk at 1-800-381-1532 or rgov@nsf.gov.

X



#### **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.

Review your information for accuracy.			
Organization Name: Brown, Michael R			
Role: Proposed Postdoctoral Fellow			
Your Contact Details			
Work Phone Number: (222) 222-2222			
Work Email: michael_brown@gmail.com			
Your Degree Information			
Highest Degree Type: AS - Associate in Science			
Degree Year: 2017			
Your Work Address			
Country: United States			
Time Zone: America/New_York			
Street Address: 123 Elm Strett			
Street Address (Line 2):			
City: Alexandria			
State: Virginia			
Postal Code: 22222			
Your Demographic Information			
Sender: Male			
Race: Asian			
Ethnicity: Not Hispanic or Latino			
Do you have a disability?: No			
	Cancel	Previous	Submit

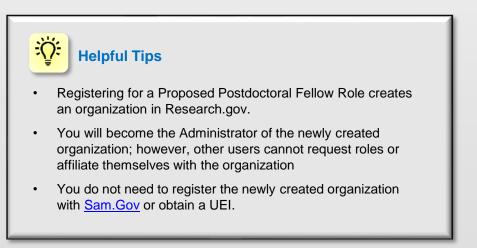
#### Figure 4

#### **Step 3: Confirmation**

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

Add a Proposed Postdoctoral Fellow Role
P You have successfully added the Proposed Postdoctoral Fellow role. Please note that it can take up to 30 minutes for you to be able to prepare postdoctoral fellowship proposals.
Prepare and Submit Proposale >
Continue to My Profile >
Add Additional Roles >







### View My Roles – Requested Role(s)



The View My Roles page shows the roles you have requested that 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.

#### Access the View My Roles page

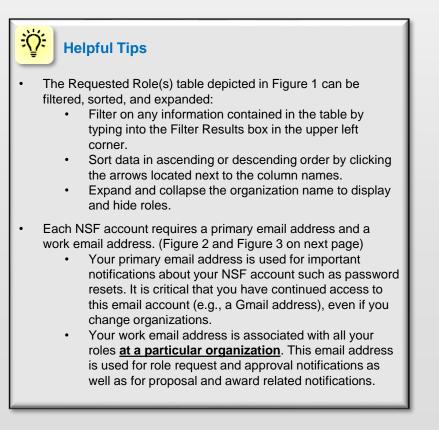
- Open <u>Research.Gov</u>
- Click "Sign In" located at the top right of the screen.
- Enter your credentials (e.g., NSF ID and password) and click "Sign In".
- Click "My Profile" located at the top right of the screen.
- Click "View My Roles" from the left navigation bar.

## Filter Results Requested Role(s) Organization Name Work Phone Work Email Action User SAM Legal Business Name (123) 857-5309 gblock@associates.nsr.go Edit Your Contact Info See Org Contact(s) New SAM Legal Business Name (123) 857-5309 gblock@associates.nsr.go Edit Your Contact Info See Org Contact(s) Role(s) Date Added Other Authonized User (OAU) 11/17/2021 Administrator (Admin) 12/05/2021 Figure 1

### How do I change my organization contact information for a non-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 table (Figure 1)
- <u>Users who have non-PI or co-PI roles will see the screen</u> depicted in Figure 2 and can edit their work phone number and work email address. Then click "Save". (Figure 2)

our information for Florida State University. SF account information is located on My Profile. Required			
Work Phone Number	* Work Email 🚯		
888888888	claude11@claude11.com	•	
	_		





### How do I change my 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 table. (Figure 1 on previous page)
- <u>Users who have a PI or co-PI role</u> will see the screen depicted in Figure 3 and can edit their contact details, degree information, and work address. Then click "**Save**".

### 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)

Edit Your Contact Information			×
Your information for North Carolina State U	Iniversity.		
NSF account information is located on My F	rofile.		
* Required			
Your Contact Details			
* Work Phone Number		* Work Email ()	
(222) 222-2222		bjonas@tlu.edu	
Your Degree Information * Highest Degree Type DrPH - Doctor of Public Health Your Work Address * Country United States	v	• Degree Year 1989 V	
* Street Address		Street Address (Line 2)	
123 Elm Street			
Department Name			
* City	* State	* Postal Code	
Alexandria	Virginia	22307 Save	Cancel

#### 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. It is critical that you have continued access to this email account (e.g., a Gmail address), even if you change organizations.
  - Your work email address is associated with all your roles <u>at a particular organization</u>. This email address is used for role request and approval notifications as well as for proposal and award related notifications.

Organization Contact(s)	×
Show 5 💌	
	showing 1-5 of 34 < < Prev 1 2 3 4 5 Next> >>
Organization Contact(s)	Organization Contact Type
Debra Callaway	Administrator
Jasmine Campbell	Administrator
Lisa Cantore	Administrator
Nicky Choi	Administrator
Autumn Eck	Administrator
	showing <b>1-5</b> of 34 ≪ < Prev <b>1</b> 2 3 4 5 Next≻ ≫

Figure 3



### View My Roles – Active Role(s)

Additional guidance including FAQs and instructional videos can be found on the Research.gov <u>About Account Management</u>. page. Account management questions may be directed to the NSF IT Help Desk at 1-800-381-1532 or <u>rgov@nsf.gov</u>.

Version 1.8, Updated October 21, 2022



The View My Roles page shows the roles you have requested that 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. You may set your Primary Organization designation if you have a Principal Investigator role at an organization or are a Proposed Postdoctoral Fellow.

#### Access the View My Roles page

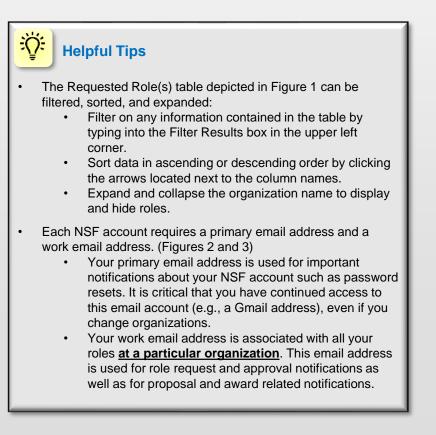
- Open <u>Research.Gov</u>
- Click "Sign In" located at the top right of the screen.
- Enter your credentials (e.g., NSF ID and password) and click "Sign In".
- Click "My Profile" located at the top right of the screen.
- Click "View My Roles" from the left navigation bar.

#### How do I change my organization contact information for a non-PI, co-PI or 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)
- <u>Users who have non-PI, co-PI or Proposed Postdoctoral Fellow</u> <u>roles</u> will see the screen depicted in Figure 2 and can edit their work phone number and work email address. Then click "Save". (Figure 2)

e Role(s)			
Organization Name	Work Phone	Work Email	n
Brown, Michael R ✔(PI Primary Organization)	(222) 222-2222		our Contact Info
		Date Added	:
Role(s)		Date Added	

Edit		×
Your information for Florida State University. NSF account information is located on My Profile. * Required		
* Work Phone Number	* Work Email 🚯	
888888888	claude11@claude11.com	
	Save	Canoel
		Figure 2





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

### How do I change my 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 Requested Roles table. (Figure 1 on previous page)
- <u>Users who have a PI or co-PI role</u> will see the screen depicted in Figure 3 and can edit their contact details, degree information, and work address. Then click "**Save**".

### How do I change my 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)
- <u>Users who have a Proposed Postdoctoral Fellow role will see</u> the screen depicted in Figure 4 and can edit their contact details, degree information, and work address. Then click "**Save**".

### 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)

### 😯 Helpful Tips

- Each NSF account requires a primary email address and a work email address. (Figures 2 and 3)
  - Your primary email address is used for important notifications about your NSF account such as password resets. It is critical that you have continued access to this email account (e.g., a Gmail address), even if you change organizations.
  - Your work email address is associated with all your roles <u>at a particular organization</u>. This email address is used for role request and approval notifications as well as for proposal and award related notifications.

Edit Your Contact Information			×
Your information for North Carolina State Univ	ersity.		
NSF account information is located on My Prof			
* Required			
Your Contact Details			
* Work Phone Number		* Work Email (1)	
(222) 222-2222		bjonas@tlu.edu	-
Your Degree Information			
* Highest Degree Type		* Degree Year	
DrPH - Doctor of Public Health	•	1989	•
Your Work Address			
* Country			
United States	•		
* Street Address		Street Address (Line	2)
123 Elm Street		ou occritations (Enite	-,
December of Marrie			
Department Name			
	* State		* Postal Code
Alexandria	Virginia	•	22307
			Save Cancel
Principal invest	gator r co-Principal III	resigator (PI)	US/US/2022 C Primary Organ
			Figure 3
Edit Your Contact Information			×
Your information for Jonas, Robert M.			
NSF account information is located on M	Profile.		
* Required			
Your Contact Details			
* Work Phone Number		* Work Email 🚯	
			-
(111) 111-1111		bjonas@tlu.edu	•
Your Degree Information			
* Highest Degree Type		* Degree Year	
DrPH - Doctor of Public Health	•	1989	•
Your Work Address			
* Country			
United States	•		
* Street Address	Charact & distance	(1 :== 2)	
	Street Address	(Line 2)	
1 Street Address			
* City	* State		* Postal Code
Leesburg	Virginia	-	20345
			Save Cancel
			Figure 4
Organization Contact(s	)		×
Show 5			
		showing 1-5 of	34 « < Prev 1 2 3 4 5 Next> »
Organization Contact(s)		Organization C	contact Type
Debra Callaway		Administrator	
Jasmine Campbell		Administrator	
Lisa Cantore		Administrator	
Nicky Choi		Administrator	
Autumn Eck		Administrator	
		showing 1.5 of	34 « < Prev 1 2 3 4 5 Next> »
		andwing 1-5 Of	
			Figure 5



### How do I set an organization as my Primary Organization for proposal submissions?

- <u>Prerequisites</u>: You must have either an approved Principal Investigator (PI) role with an organization a Proposed Postdoctoral Fellow role before you can designate a Primary Organization.
  - If you don't have a Principal Investigator role and would like to add one, <u>click here</u>.
- Open the "**View My Roles**" page and locate the Active Role(s) table. (Figure 5)
- Locate the organization where you have an approved PI role that you would like to set as your Primary Organization. (Figure 5)
- 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 5)
- Locate the Principal Investigator role. (Figure 5)
- Select the "**Primary Organization**" checkbox located to the right of the Date Added field. (Figure 5)
- Notice the green check mark and "PI Primary Organization" label under the organization name. (Figure 5)
- You now have set the organization as the Primary Organization. The Primary Organization is the default for your proposal submissions.

Filte	er Results			
Act	ive Role(s)			
	Organization Name	Work Phone	Work Email	♦ Action
•	MOHOLLAND TRANSFER, INC. • View SAM Legal Business Name • (PI Primary Organization)	(999) 999-9999	gblock@associates.nsf.go v	Edit Your Contact Info See Org Contact(s)
	Role(s)		Date Added	\$
	Other Authorized User (OAU)		11/29/2021	
	Principal Investigator / co-Principal	Investigator (PI)	11/29/2021	rimary Organization
			11/29/2021	

Figure 5

### Helpful Tips

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



### **View My Users – Administrator Dashboard**

Additional guidance including FAQs and instructional videos can be found on the Research.gov <u>About Account Management</u>. page. Account management questions may be directed to the NSF IT Help Desk at 1-800-381-1532 or <u>rgov@nsf.gov</u>.

Version 1.8, Updated October 21, 2022



The View My Users page is a dashboard for the organization Administrator to view the organization's pending role requests and manage user tables. Via this dashboard, the Administrator is able to approve or disapprove role requests, add or remove current user roles, add current NSF users to the organization, invite users to create NSF accounts, and invite current users to update their profile information.

#### Access the View My Roles page

- Open <u>Research.Gov</u>
- Click "Sign In" located at the top right of the screen.
- Enter your credentials (e.g., NSF ID and password) and click "Sign In".
- Click "My Profile" located at the top right of the screen.
- Click "View My Users" from the left navigation bar.

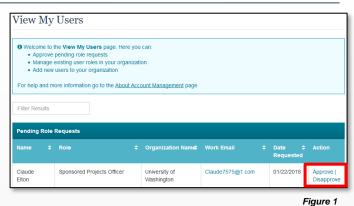
### How do I approve or disapprove a role request from a user?

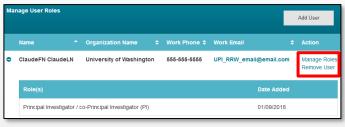
- View the "Pending Role Requests" table. (Figure 1)
- For each user role request, click "Approve" to accept a user's request or "Disapprove" to reject a user's request. (Figure 1)
- Approved role requests will now appear in the "Manage User Roles" table. (Figure 2)

#### How do I add or remove user roles?

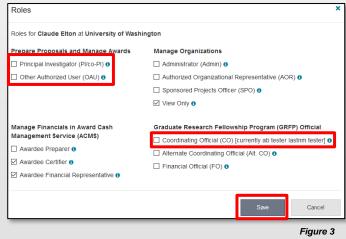
- View the "Manage User Roles" table. (Figure 2)
- Click "Manage Roles" located in the Action column on the right side of the table. (Figure 2)
- Select the appropriate role(s) to assign or remove from the user and click "Save." (Figure 3)
  - *Caution:* Deselecting all roles for a user will remove the user from the organization. (Figure 3)
  - If another user has the Coordinating Official (CO) role, the system will display the current CO's name. (Figure 3)
    - Note: There can only be one CO at an organization, and a CO cannot be removed from the organization unless the role is reassigned to another user.
  - If a user has not entered the required Principal Investigator Degree Information, work email and work phone number for the specified organization, an "Info Needed" 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.

The user must input and save the required information by clicking on the "Edit Your Contact Info" link located in the Active Roles table.









Ma	nage User Roles	5					Add User
	Name	¢	Organization Name	¢	Work Phone 💠	Work Email 💠	Action
•	Claude Elton		IDAHO FRESH COOPERATIVE	INC		c@c1.com	Manage Roles Remove User
	Role(s)				_	Date Ac	Ided
	Principal Inves	tigato	or / co-Principal Investigator (PI)	A Info Needed		01/18/20	018

Figure 4

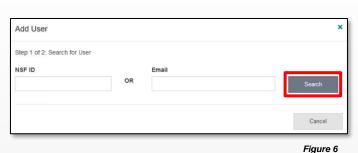


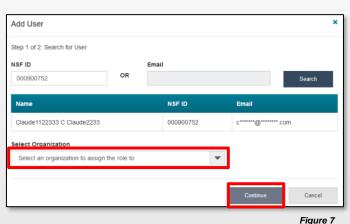
## View My Users – Administrator Dashboard (continued)

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

- View the "Manage User Roles" table. (Figure 5)
- Click "Add User." (Figure 5)
- Enter an NSF ID or email address and click "Search". (Figure 6)
- Ensure the intended user name appears.
  - If you are an Administrator for multiple organizations, select an organization from the dropdown menu. (Figure 7)
- Click "Continue". (Figure 7)
- Select the appropriate role(s) to assign to the user. (Figure 8)
  - 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 8)
  - If a user does not have the required Principal Investigator Degree Information associated to their NSF account and/or does not have a work email address and a work phone number associated with the organization, an "Info Needed" icon will appear next their name and PI role. In addition, this icon will display on the user's View My Roles page. The user must input and save the required information by clicking on the "Edit Your Contact Info" link located in Active Roles table.
  - **Caution:** Deselecting all roles for a particular user will remove the user from the organization. (Figure 8)
  - If another user has the Coordinating Official (CO) role, the system will display that current CO's name. (Figure 8)







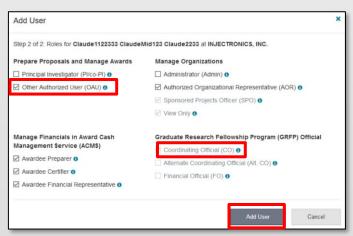


Figure 8

#### Helpful Tip

÷Ö:

To add a user to an organization or to add a roles to a user, the user must have an updated profile. A user can only update their profile if they have successfully migrated their account and updated their primary email address and phone number.



## View My Users – Administrator Dashboard (continued)

### How do I invite a user at my organization to update their profile so I can add/remove their roles?

- Locate the "Manage User Roles" table. (Figure 9)
- Click "Invite to Update Profile" located in the Action column.
   (Figure 9)
- An email will be sent to the user informing them to update their profile.

#### 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?

- Locate the "Manage User Roles" table. (Figure 9)
- Click "Add User". (Figure 9)
- Enter an email address and click "Search". (Figure 10)
- Ensure the correct email address appears. (Figure 10)
  - If you're an Administrator at multiple organizations, select an organization to invite the user. (Figure 10)
- Click "Invite to Register". (Figure 10)

#### How do I remove a user from my organization?

- Locate the "Manage User Roles" table. (Figure 11,12)
- Click "Remove User" located in the Action column.
   (Figure 11 shows a user who has migrated to the new account management system and Figure 12 shows a user who has not migrated to the new account management system)

A user cannot be removed if they are the last or sole Administrator.

- A user cannot be removed if they are the current 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's system.
- 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 13)

### Pelpful Tip

Users must have an updated profile in order to be added to an organization and to be assigned roles. A user can only update their profile if they have successfully migrated their account and verified their primary email address and phone number.

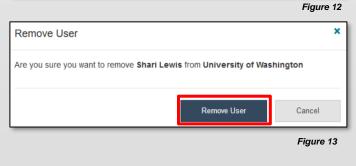


Figure 9

Add User			
Step 1 of 2: Search for User			
NSF ID		Email	
	OR	1@1.com	Search
search or invite the user to re		mail is either invalid or is not registered w a email using the 'Invite to Register' button	
search or invite the user to re	egister with NSF vi	a email using the 'Invite to Register' button	
search or invite the user to re	egister with NSF vi	a email using the 'Invite to Register' button	
search or invite the user to re Select Organization	egister with NSF vi	a email using the 'Invite to Register' button	n below.









### **Migrate Your Existing NSF Account**



### **Migrate Your Existing NSF Account**

To migrate your existing NSF account to NSF's current account management system, 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 Help Desk for assistance.

#### How will the system prompt me to verify my information Verify Your Information so that my account can be migrated? NSE is updating its account management system and we need you to verify your account You will receive a Verify Your Information pop-up. After you have information. This is a one-time process. read it, click "Next". (Figure 1) On the next screen, you will be asked to review your account's primary email address and Select an email address, enter your 10-digit phone number, and phone number. click "Next". (Figure 2) If you have questions, please contact the NSF IT Help Desk at 1-800-381-1532 or rgov@nsf.gov Note the information that has been saved as your account's primary email address and phone number. (Figure 3) Next Click "Go to View My Roles" and you will be directed to the View My Roles page to view current active roles for your Figure 1 organization(s). (Figure 3) Verify Your Information Please verify your primary email address and phone number. After this one time Notes: verification process, you will be able to make future updates to this account information in My Profile Demographic information that had been entered in Charles A Bobrow-Strain (NSF ID: 000300002) FastLane will migrate to Research.gov along with the rest of your account and profile information as part of the migration process \* Reauired Upon completing the verification process, you will see a green \* Primary Email 🚯 success message at the top of the screen. To View/Edit your Select One account and demographic information if you have a PI role, click \* Phone Number the <u>My Profile</u> link in the success message. (Figure 3) **Helpful Tip** ÷O: Nex Figure 2 For instructions on how to make changes to your account profile information after your existing NSF account has been migrated to NSF's new account management system, please refer to the View and Edit My NSF Account Profile Information job aid. Verify Your Information Your account information has been verified and saved successfully To update your Account and Demographic Information, visit My Profile Account Information Primary Email Phone Number (703) 236-1083 x01134 francisquinn@gmail.com Please proceed to the View My Roles page to ensure you have the correct role(s) If changes are needed, you will now be able to request a new role

Figure 3



## 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. After reading, click "Next". (Figure 1)
- The "Multiple Accounts Found" pop-up informs you that your email address(es) is associated with more than one NSF ID. (Figure 4)
- Click "Go To My Desktop". (Figure 4)
- <u>Important Note:</u> Please be aware that the system will allow you to access My Desktop functionality for a grace period of 30 days.

#### My grace period has expired. What do I do?

- You will receive a Verify Your Information pop-up. After reading click "Next". (Figure 1)
- The "Multiple Accounts Found" pop-up informs you that an update to your account is required in order to restore service. (Figure 5)
- This pop-up will appear each time you sign in until you contact the NSF IT Help Desk to reinstate your access to NSF systems. (Figure 5)
- Click "Close". (Figure 5)

#### Multiple Accounts Found

Your account email address(es) are associated with more than one NSF ID. NSF users should only have one NSF ID account per the NSF Proposal & Award Policies & Procedures Guide (PAPPG).

You may continue work on proposals and awards, however, NSF has logged this discrepancy and will contact you to help reconcile your multiple accounts. Please be aware that these accounts must be reconciled, but there will be a grace period before your system access will cease.

If you have questions, please contact the NSF Help Desk at 1-800-381-1532 or rgov@nsf.gov.

Go To My Desktop

Figure 4

lding	Multiple Accounts Found
æ.	An information update to your account is required in order to restore service.     Please contact IT Help Central 1-800-381-1532 or rgov@nsf.gov.
tact ems.	Please contact the HelpDesk.
	Your account email(s) are associated with more than one NSF ID. NSF users should only have one NSF ID account per NSF Proposal & Award Policies & Procedures Guide (PAPPG).
	If you have questions, please contact the NSF Help Desk at 1-800-381-1532 or rgov@nsf.gov.
	Close
	Figure 5

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

- You will receive a Verify Your Information pop-up. After you have read it, click "Next". (Figure 1)
- Notice the "Account Verification Failure" pop-up informing you that your email address(es) is in an invalid format. (Figure 6)
- You must contact the NSF IT Help Desk to address this issue. (Figure 6)
- Click "Close". (Figure 6)

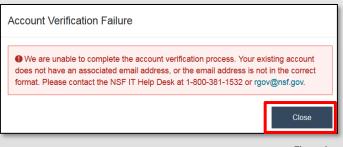


Figure 6