



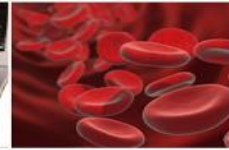
National Science Foundation

Electronic Research Administration (ERA)

Forum Webinar Series

April 12, 2018





Welcome to the NSF ERA Forum Webinar Series

- The agenda and presentation are available on the Policy Office website via this link: https://www.nsf.gov/bfa/dias/policy/era_forum.jsp
- USA/Canada, dial 1-888-898-1539 and enter passcode 9931726
- To view real-time captions, go to <http://fedrcc.us/fedrcc/> and enter event confirmation number 3606676
- **Helpful WebEx Tips:** Please click “save and run” to download the WebEx media player plugin and join the session. Call WebEx technical support at 1 (866) 229-3239 if you need additional assistance



Agenda

- Welcome, Forum Webinar Logistics, and How to Engage with the Forum
- The ERA Forum
- Speakers
- Prioritization of Today's Forum Webinar Discussion Topics
- Forum Webinar Discussion Topics
 - New Research.gov Account Management Modernization Functionality
 - New Research.gov Proposal Preparation and Submission Functionality
 - NSF Awards Management System
- Questions and Answers



How to Engage with the Forum

Forum Participation

- WebEx Live Q&A
- Survey
- Future Forum Topics
- Forum Listserv and Email
- General Information





Live Q&A Through WebEx

Cisco WebEx Event Center

File Edit View Communicate Participant Event Help

Event Info

NSF April 2018 ERA Forum Webinar

Host: Melissa Barrington

Audio connection: Audio is provided by telephone only. Please dial:
Toll-free # 1-888-898-1539
Toll #1-773-756-0829
Participant passcode: 9931726

For Closed Caption Services visit <http://fedrcc.us/> and enter event confirmation number 3606676.

Event number: 743 605 976

Participants

- Panelists: 1
- Attendees:
 - MB **Melissa Barrington** (me)

Chat

Q&A

All (0)

Ask: All Panelists

Select a panelist in the Ask menu first and then type your question here. There is a 256-character limit.

Send

Connected

Click on Q&A icon on the top-right corner

In the Q&A window select "All panelists" to send your questions and comments.



The ERA Forum

Background and Purpose

- Provides a new approach to regularly engaging the research community, which includes collecting individual opinions and perspectives on ERA activities, gathering topics of interest for future Forum Webinars, and soliciting volunteers for usability studies.

Past Forum Webinars:

- September 2017:
 - NSF's initiative to streamline and modernize registration functionality, including new role request features and dashboards for managing accounts, as well as how existing accounts will be migrated to the new system
 - Updates on the Proposal File Update (PFU) feature as part of NSF's Proposal Submission Modernization (PSM) initiative
- March 2017:
 - PSM Initiative: SPO and AOR Access and Activities
 - Forum Webinar Topic Priority: Proposal Automated Compliance Checking



Speakers



Office of Budget, Finance, and Award Management (BFA)

Office of Information and Resource Management (OIRM)

Maria Koszalka

Jean Feldman

Jeff Vieceli

Heather Ireland

William Daus

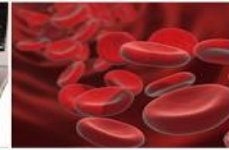
Staff Associate,
Research.gov, Division
of Institution and
Award Support

Head, Policy
Office, Division of
Institution and
Award Support

Head, Systems
Office, Division of
Institution and
Award Support

Project Manager,
Division of
Information
Systems

Chief, Research
Directorate Systems
Branch, Division
of Information
Systems

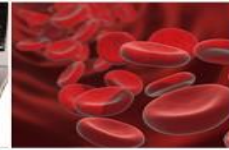


Prioritization of Today's ERA Forum Discussion Topics

- Forum Discussion Topics:
 - New Research.gov Account Management Modernization Functionality
 - New Research.gov Proposal Preparation and Submission Functionality
 - NSF Awards Management System
 - Significance of Today's Discussion Topics
 - Reducing Unreasonable Administrative Burden



WHERE DISCOVERIES BEGIN



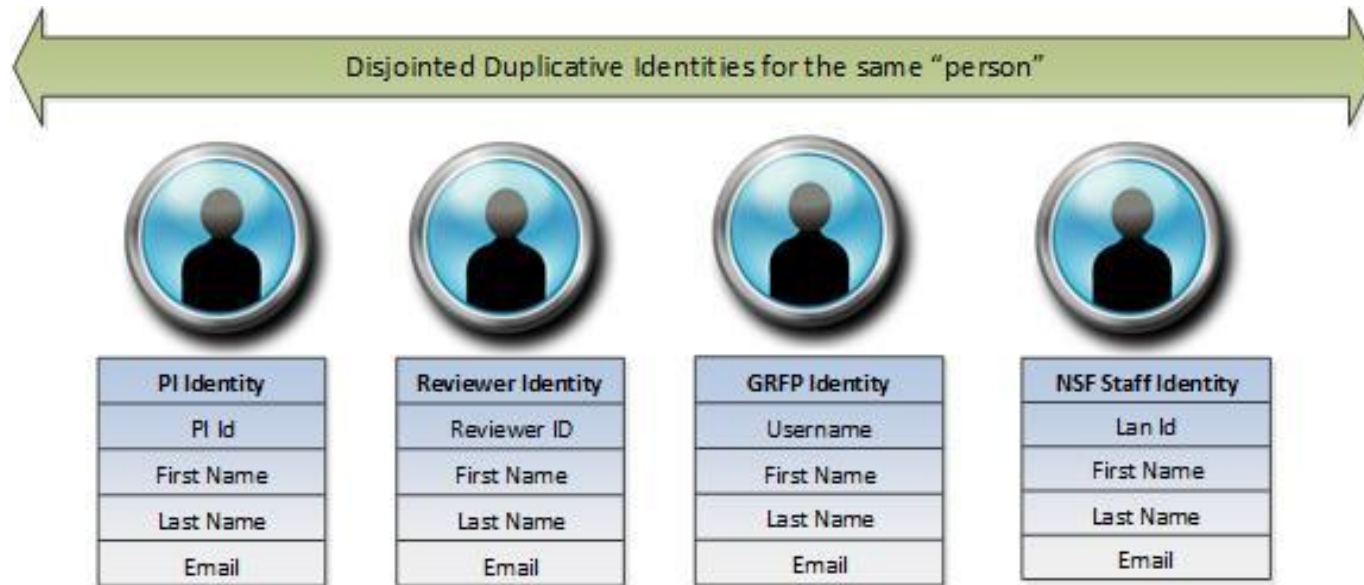
NEW RESEARCH.GOV ACCOUNT MANAGEMENT MODERNIZATION OVERVIEW



Current State – Multiple Identities

The research community interacts with NSF’s external grant systems for a broad range of activities. Currently, interactions with NSF systems involve multiple access points requiring a variety of login credentials.

Current State - Multiple Identities Per User

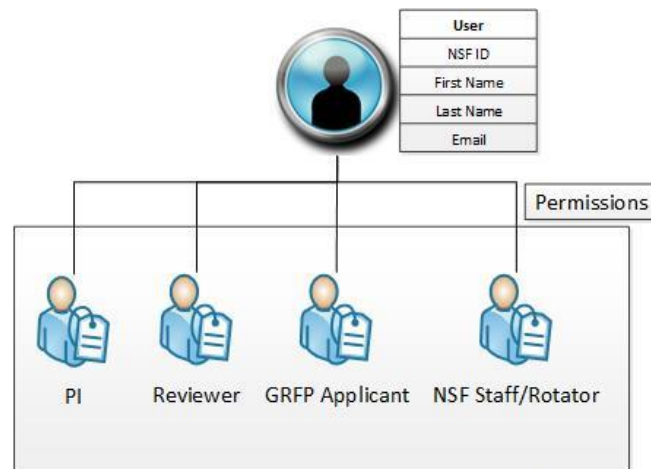




Target State – Single NSF Identity

With leadership from a working group including NSF Program staff, OGC, DIAS, and DFM, NSF is modernizing the account management of its external grant systems to streamline the user experience for maintaining accounts and centralizing access. A person's NSF ID will be used to manage his or her profile data and permission information.

Target State – A Single Identity per User

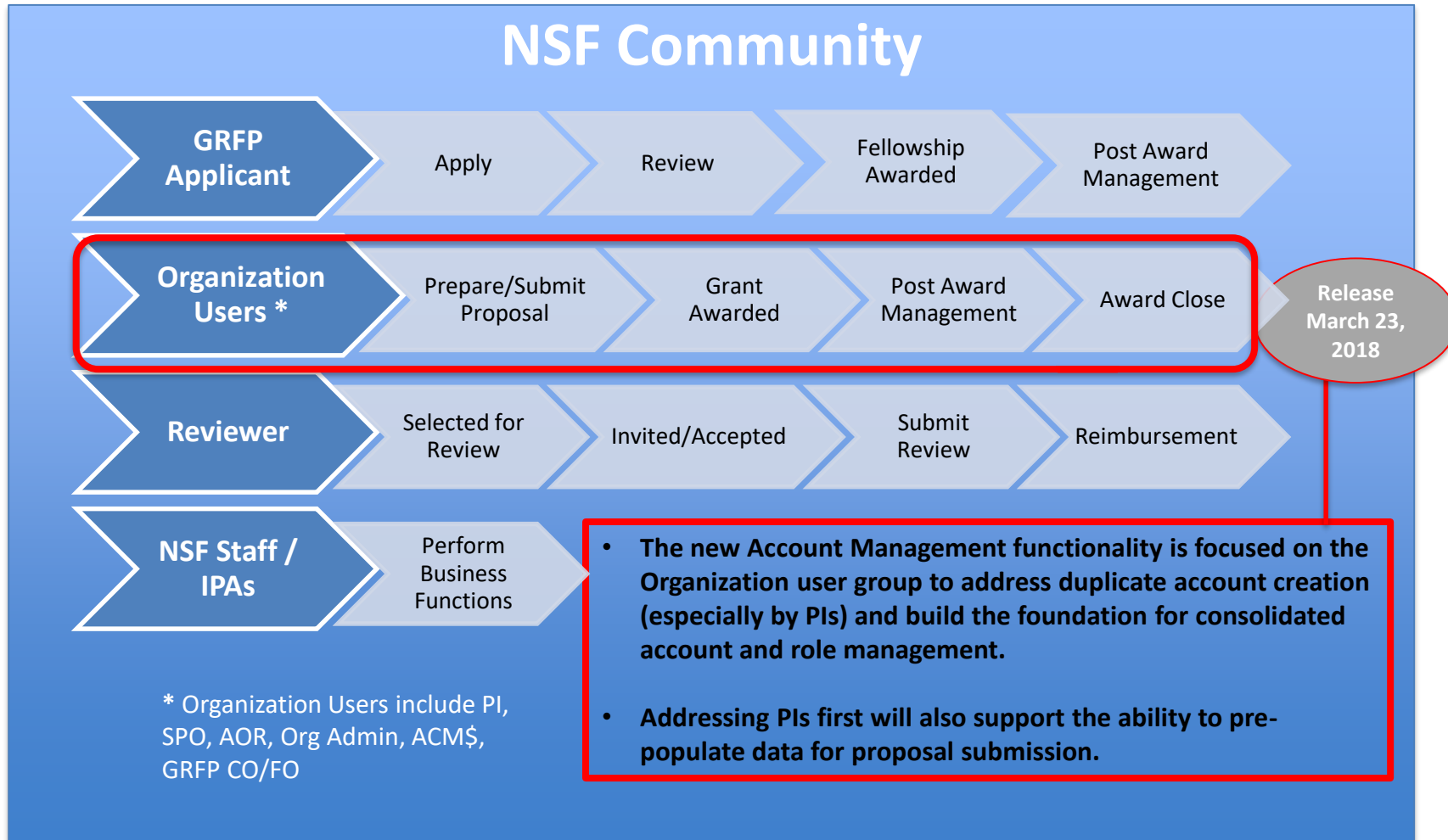


Modernization is focusing on:

- **Login:** Users currently maintain multiple logins for different systems, which requires users to keep track of multiple logins and passwords/pins.
- **Account:** NSF will implement additional rules to enforce its policy that states each user should only have one account (i.e., NSF ID).
- **Self Registration:** Users are currently unable to establish an NSF ID and password without assistance from the organization's Administrator. This puts an additional burden on the Administrator to register users and ensure accurate information.
- **Role Request:** Users do not have an automated way to request role permissions (e.g., PI, GRFP Coordinating Official) from their organization's Administrators.
- **Profile Management:** Users currently maintain profile information associated with their accounts (e.g., email addresses) in multiple locations, which can lead to inconsistent data.



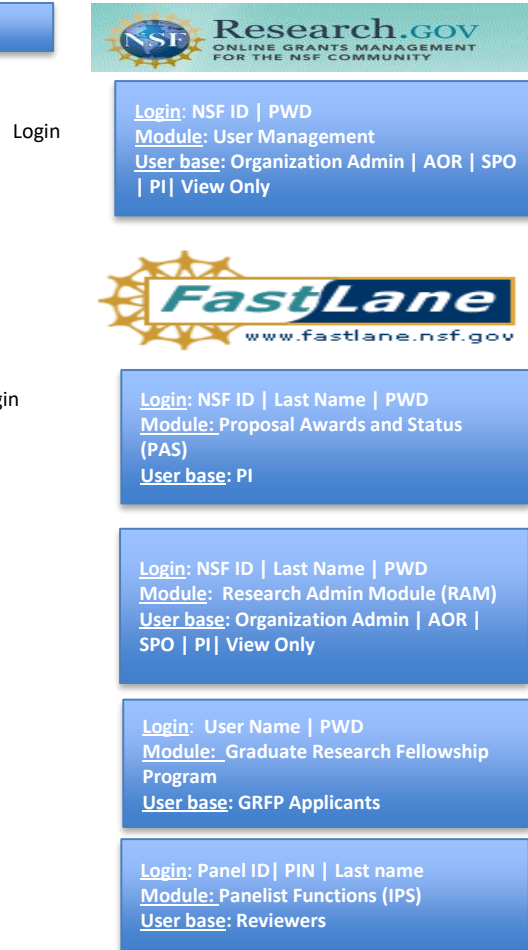
Account Management User Groups





Current and Target States

Current State



Individuals login via five different locations and maintain profile information in five locations.

Target State



Individuals login once and maintain profile and role information in one location.

Note: ACM\$ = Award Cash Management Service; AOR = Authorized Organizational Representative; GRFP = Graduate Research Fellowship Program; and IPA = Intergovernmental Personnel Act (IPA) Rotators

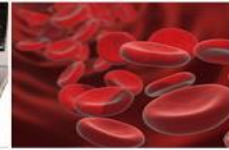


Retirement of Account Management Functionality

| Retirement of Existing Account Management Functionality | New Account Management Functionality in Research.gov |
|--|--|
| <p><u>Research.gov</u>: User Management Module and</p> <p><u>FastLane</u>: Research Administration Accounts Management- User Account Tab</p> | <p>Organization Administrators will have the capability to assign, remove, approve, and disapprove roles as well as add and remove users for their organizations.</p> <p>Individuals will have the capability to request roles and edit their profile information.</p> |
| <p><u>FastLane</u>: New Organization and FastLane Contact Registration Postdoctoral Fellowship Registration </p> | <p>Individuals will have the capability to self-register, self-request roles, and register a new organization.</p> |
| <p><u>Fastlane</u>: Proposal, Awards and Status – Change PI Information, Change Institution (Demographics will remain in FastLane)</p> | <p>Users will no longer update PI information through FastLane. Users will update role information and set their primary organization through the new Account Management application.</p> |



WHERE DISCOVERIES BEGIN



NEW RESEARCH.GOV ACCOUNT MANAGEMENT MODERNIZATION FUNCTIONALITY



Account Registration

Account Registration

NSF Proposal & Award Policies & Procedures Guide (PAPPG) specifies that each individual user of NSF systems should not have more than one NSF ID (Chapter I.G.4, NSF ID). [Forgot/Look Up your NSF ID?](#)

*** Required Fields**


Prefix * First Name Middle Name * Last Name Suffix

Alternate Name(s) Nickname, maiden name, etc.

* Primary Email * Confirm Primary Email

Secondary Email Confirm Secondary Email

ORCID ID 18-digits ie. 1234-1234-1234-1234 Phone Number

I'm not a robot 
reCAPTCHA Privacy - Terms

* I confirm that I am at least 13 years of age.

New Account Management Functionality

New users will have the ability to register for an account and receive an NSF ID and password. Additional logic to verify email addresses has been put in place to ensure an individual maintains one account.

Existing users will **not** go through the account registration process. After the new functionality is launched, existing users will be migrated to the system when they sign into Research.gov.



View/Edit Profile

Research.gov
ONLINE GRANTS MANAGEMENT FOR THE NSF COMMUNITY

Welcome Acpt tester tester | Sign Out (Home) | My Profile | Contact | Help | About

My Desktop | Prepare & Submit Proposals | Awards & Reporting | Manage Financials | Administration

Hide Menu

- My Profile
 - View/Edit Profile**
- My Roles
 - View My Roles
 - Add a New Role
- My Organizations
 - View My Users
- Quick Links
 - About Account Management
 - Research Administration

My Profile

For NSF ID 000917035

Welcome to the **My Profile** page. Here you can edit your profile information and change your password.

Please Note:

- Your primary email address will be used for notifications about your NSF account
- To change your contact information listed at an organization, go to [View My Roles Page](#)
- Updates to an organization's information must be made by your Administrator in FastLane.

For help and more information go to the [About Account Management](#) page

Prefix

Change Password

First Name
Acpt tester

Middle Name

Last Name
tester

Suffix

Alternate Name(s)

Primary Email ⓘ
lntester6@tester.com

Secondary Email

Phone Number

ORCID iD ⓘ

Edit

New Account Management Functionality

Individuals will have the ability to view and edit their profile information from the "My Profile" link and also initiate the change password process.



Add a New Role

Research.gov ONLINE GRANTS MANAGEMENT FOR THE NSF COMMUNITY

Welcome Acpt tester tester | Sign Out (Home) | My Profile | Contact | Help | About

My Desktop | Prepare & Submit Proposals | Awards & Reporting | Manage Financials | Administration

Hide Menu

- My Profile
 - View/Edit Profile
- My Roles
 - View My Roles
 - Add a New Role**
- My Organizations
 - View My Users
- Quick Links
 - About Account Management
 - Research Administration

Add a New Role

For NSFID 000917035

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 Organizational Role" button
- Get more information about a role category by clicking on the role details link below each button

For help and more information go to the [About Account Management](#) page

Select one to work on proposal and award activities.

Prepare Proposals and Manage Awards

Principal Investigator (PI) / co-Principal Investigator (co-PI), Postdoctoral Fellowship Investigator

Add Investigator Role

[Principal Investigator role details](#)

Add and Manage Organizations

Administrator (Admin), Authorized Organizational Representative (AOR), Sponsored Projects Officer (SPO), View Only User

Add Organizational Role

[Organizational role details](#)

Manage Financials in Award Cash Management Service (ACMS)

Awardee Preparer, Awardee Certifier, Awardee Financial Representative

Add Financial Role

[Financial role details](#)

Register as a Graduate Research Fellowship Program (GRFP) Official

Coordinating Official (CO), Alternate Coordinating Official (Alt.CO), Financial Official (FO)

Add GRFP Official Role

[GRFP role details](#)

New Account Management Functionality

Individuals will have the ability to request roles such as PI, organization Administrator, AOR, SPO, View Only, ACM\$, and GRFP through the "Add a New Role" page. Role requests will require an approval from an Administrator at the organization.



Role Request Wizard

Add a New Role to Add and Manage Organizations

1. Find Organization | 2. Add Information | 3. Choose Role(s) | 4. Review | 5. Confirmation

Find Organization

Enter DUNS number [What is a DUNS number?](#) [How can I find my DUNS number?](#)

OR

Select from your Organization and DUNS number list

Arizona State University West Campus - 943360412

| Select | DUNS Number | Organization | Organization Contact(s) | Registered with NSF |
|-----------------------|-------------|--------------------------------------|--|---------------------|
| <input type="radio"/> | 943360412 | Arizona State University West Campus | Acpt tester tester See all (1) | Yes |
| <input type="radio"/> | 943360412 | Arizona State University East Campus | Tamara Deuser See all (4) | Yes |
| <input type="radio"/> | 943360412 | Arizona State University | Mary Barber See all (29) | Yes |

New Account Management Functionality

After choosing the type of role to request, all role requests will follow the same steps, as indicated below:

- 1) Look Up Organization** – Enter the organization’s DUNS number registered in SAM
- 2) Add Information** – Add work phone and work email (Note: If a PI role or new organization is selected, additional information is required)
- 3) Choose Role(s)** – Select the role(s) from a list of available roles
- 4) Review** – Review the role request information
- 5) Confirmation** – Confirm the role request. The organization Administrator will then receive an email notification to approve the request.



Role Request Wizard Continued

Add a New Role to Add and Manage Organizations

1. Find Organization | 2. Add Information | 3. Choose Role(s) | 4. Review | 5. Confirmation

Find Organization

Enter DUNS number [What is a DUNS number?](#) [How can I find my DUNS number?](#)

OR

Select from your Organization and DUNS number list

Arizona State University West Campus - 943360412

| Select | DUNS Number | Organization | Organization Contact(s) | Registered with NSF |
|-----------------------|-------------|--------------------------------------|--|---------------------|
| <input type="radio"/> | 943360412 | Arizona State University West Campus | Acpt tester tester See all (1) | Yes |
| <input type="radio"/> | 943360412 | Arizona State University East Campus | Tamara Deuser See all (4) | Yes |
| <input type="radio"/> | 943360412 | Arizona State University | Mary Barber See all (29) | Yes |



Role Request Wizard – New Organization Registration

Add a New Role to Add and Manage Organizations

1. Find Organization ▼ 2. Add Information 3. Choose Role(s) 4. Review 5. Confirmation

Add Information

The contact information will be used for all communications when performing in approved roles for this organization

*** Required**

Your Contact Details

*** Work Phone**

*** Work Email** ⓘ

Organization Details

*** Organization Short Name**

*** Organization Type** ⓘ

*** Time Zone** ⓘ

*** Organization Phone Number**

Organization Fax Number

*** Organization Email**



Role Request Wizard – PI

Prepare Proposals

Would you like to perform these actions as a part of an organization?

Yes, prepare and manage proposals with an organization

No, prepare and manage proposals independently (e.g. unaffiliated or post-doctoral fellowship)

Add a New Role to Prepare Proposals and Manage Awards

1. Find Organization ✓ 2. Add Information 3. Choose Role(s) 4. Review 5. Confirmation

Existing role information: You currently have role contact information for the selected organization. All roles share the same contact information within the same organization. Please review the information for accuracy. If you choose to update the contact information, all other roles for this organization will be updated with the new information.

Add Information

The contact information will be used for all communications when performing in approved roles for this organization

*** Required**

Your Contact Details

* Work Phone Number: 3011011013

* Work Email: testNewOrg1@tester.com

Your Degree Information

* Degree Type: Select One

* Degree Year: Select Year

Your Work Address

* Country: Select One

* Street Address: [text input]

Street Address (Line 2): [text input]

Department Name: [text input]

* City: [text input]

* State: Select State

* Postal Code: [text input]



Role Request Wizard – Confirmation

Choose Your Role(s) with - Fairchild Tropical Garden

1. Look Up Organization ✓ 2. Add Information ✓ 3. Choose Role(s) 4. Review 5. Confirmation

* Required fields
 * Select all roles that apply. [What are these roles?](#)

- Administrator (Manage Roles)
- Authorized Organizational Representative - AOR (Submit Proposals)
- Sponsored Projects Officer - SPO (View/Edit Proposals)

Previous Next

Review

1. Look Up Organization ✓ 2. Add Information ✓ 3. Choose Role(s) ✓ 4. Review 5. Confirmation

Review your information for accuracy.

Organization Name: Fairchild Tropical Garden
 Role(s): Administrator, Sponsored Projects Officer, View Only
 Work Email: lmao@nsf.gov
 Work Phone Number: 1111111111

Previous Submit

5. Confirmation

Success - your request has been submitted to the point(s) of contact below. Check the status of your request on the [View My Roles](#) page.

| Point(s) of Contact | POC Type |
|---------------------|----------|
| Andres Behrens | SAM POC |
| KIRK FORBES | SAM POC |



Administrator's Dashboard

The screenshot shows the Research.gov Administrator's Dashboard. The top navigation bar includes: My Desktop, Prepare & Submit Proposals, Awards & Reporting, Manage Financials, and Administration. The left sidebar menu includes: My Profile, My Roles, My Organizations, Quick Links, About Account Management, Proposals, Awards & Status, and Research Administration. The main content area is titled "View My Users" and contains a welcome message, a filter results box, a "Pending Role Requests" table, a "Manage User Roles" section with a table for Claude Elton, and a table for VikramTest ACMSG RFP.

View My Users

Welcome to the View My Users page. Here you can:

- Manage existing user roles for your organization
- Approve pending role requests
- Add new users to your organization

For help and more information go to the [About Account Management](#) page

Filter Results

| Name | Role | Organization Name | Work Email | Date Requested | Action |
|-------------------|---------------------------------|-----------------------------|----------------------|----------------|----------------------|
| ACMSTest GRFPTEST | Alternate Coordinating Official | IDAHO FRESH COOPERATIVE INC | anotheracms@acms.edu | 01/24/2018 | Approve Disapprove |

Show 5 Filter Results showing 1-5 of 6 << Prev 1 2 Next >>

Manage User Roles 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 Added |
|--|------------|
| Awardee Preparer | 01/31/2018 |
| Principal Investigator / co-Principal Investigator (PI) ▲ Info Needed | 01/18/2018 |

| | | | | |
|----------------------|-----------------------------|--------------|----------------------|--------------------------|
| VikramTest ACMSG RFP | IDAHO FRESH COOPERATIVE INC | 888-999-0011 | acmschrome@gmail.com | Invite to Update Profile |
|----------------------|-----------------------------|--------------|----------------------|--------------------------|

New Account Management Functionality

The organization Administrator will have access to the following functionality in the "View My Users" dashboard:

- Approve / Disapprove Role Requests
- Add a User
- Manage Roles
- Remove User
- Invite to Update Profile *(This option is only needed for users that have not been migrated to the new system)*



Administrator's Dashboard – Manage Roles

Roles

Roles for Todd N Chrisley at University of Washington

| | |
|---|---|
| Prepare Proposals and Manage Awards | Manage Organizations |
| <input checked="" type="checkbox"/> Principal Investigator (PI/co-PI) ⓘ | <input checked="" type="checkbox"/> Administrator (Admin) ⓘ |
| <input type="checkbox"/> Other Authorized User (OAU) ⓘ | <input type="checkbox"/> Authorized Organizational Representative (AOR) ⓘ |
| | <input checked="" type="checkbox"/> Sponsored Projects Officer (SPO) ⓘ |
| | <input checked="" type="checkbox"/> View Only ⓘ |
| Manage Financials in Award Cash Management Service (ACMS) | Graduate Research Fellowship Program (GRFP) Official |
| <input type="checkbox"/> Awardee Preparer ⓘ | <input type="checkbox"/> Coordinating Official (CO) [currently Helene Obradovich] ⓘ |
| <input type="checkbox"/> Awardee Certifier ⓘ | <input type="checkbox"/> Alternate Coordinating Official (Alt. CO) ⓘ |
| <input type="checkbox"/> Awardee Financial Representative ⓘ | <input type="checkbox"/> Financial Official (FO) ⓘ |

Name Organization Name Work Phone Work Email

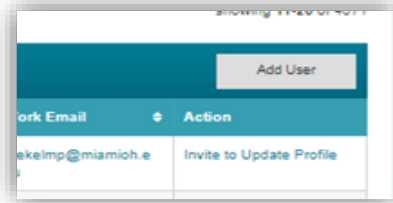
New Account Management Functionality

Administrators will have the capability to Assign and Remove roles through a link provided on the dashboard.

Business rules have been built in to simplify the selection of roles. For example, when the user selects "Administrator," SPO and View Only will be auto-selected.



Administrator's Dashboard – Invite to Register



New Account Management Functionality

Users will have the capability to invite users that are not registered with NSF to become affiliated with the Administrator's organization

Add User

Step 1 of 2: Search for User

NSF ID OR Email

Please check the email address entered. The email is either invalid or is not registered with NSF. You may retry the search or invite the user to register with NSF via email using the 'Invite to Register' button below.

Select Organization

Select an organization to invite the user to join ▼

- Select an organization to invite the user to join
- Arizona State University West Campus
- Miami University Hamilton Campus**
- READERS & WRITERS WORKSHOP, THE SANTA RITA STEEL AND HARDWARE CO
- University of Washington



User's Dashboard

Hide Menu

- My Profile
- View/Edit Profile
- My Roles
- View My Roles
- Add a New Role
- My Organizations
- View My Users
- Quick Links
- About Account Management
- Research Administration

View My Roles

Information is needed to add the Principal Investigator (PI/co-PI) role. This role appears in the Active Role(s) section below.

Welcome to the View My Roles page. Here you can:

- View your pending role requests
- Edit your contact information used at your organization(s)

For help and more information go to the [About Account Management](#) page

Filter Results

| Requested Role(s) | | | |
|--------------------------|--------------|----------------------|--|
| Organization Name | Work Phone | Work Email | Action |
| University of Washington | 101-101-1011 | lmtester6@tester.com | Edit Your Contact Info See Org Contact(s) |

| Role(s) | Date Added |
|-------------------|------------|
| Awardee Certifier | 12/01/2017 |

Filter Results

| Active Role(s) | | | |
|---|--------------|----------------------|--|
| Organization Name | Work Phone | Work Email | Action |
| Arizona State University West ... ▲(Info Needed) | 101-101-1011 | lmtester6@tester.com | Edit Your Contact Info See Org Contact(s) |

| Role(s) | Date Added |
|---|------------|
| Principal Investigator / co-Principal Investigator (PI) ▲ Info Needed | 11/28/2017 |
| Administrator (Admin) | 11/17/2017 |

New Account Management Functionality

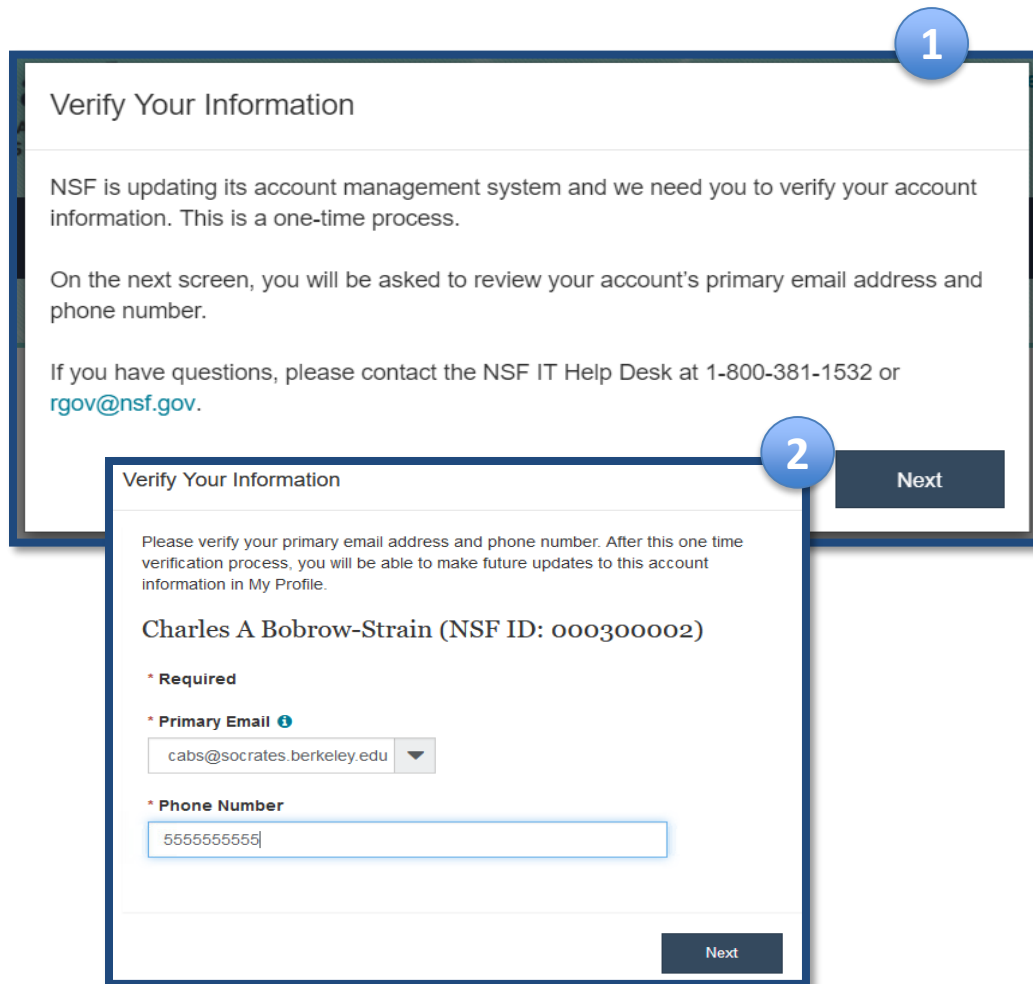
Individuals will have access to the following functionality in the “View My Roles” dashboard:

- View Pending Role Requests
- View Approved Role Requests
- Edit Role Information
- Select the Primary Organization

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Migrating Existing Users



New Account Management Functionality

Existing users will be migrated over to the new Account Management at the time of Sign In. The user will be prompted with screen (1) to start the verification process. In Screen (2) the user will select the Email and enter a phone number to be associated with the account. The user will conclude the migration process in screen (3).



Migrating Existing Users Continued

3

Verify Your Information

Your account information has been verified and saved successfully. This information can be updated as needed in the My Profile page.

Charles A Bobrow-Strain (NSF ID: 000300002)

Primary Email: cabs@socrates.berkeley.edu

Phone Number: 5555555555

Please proceed to the View My Roles page to ensure you have the correct roles(s). If changes are needed, you will now be able to request a new role.

[Go to View My Roles](#)

4

View My Roles

Your contact information was updated successfully. Additional changes can be made in [View/Edit My Profile](#).

i Welcome to the **View My Roles** page. Here you can:

- View your pending role requests
- Edit your contact information

For help and more information go to the [About Account Management](#) page

Excerpt of the View My Roles page

New Account Management Functionality

- Notes:
- Email(s) populated in the drop down are checked for uniqueness. If the user has duplicate emails, a different process is followed (*see following slide*).
 - The user will have the capability to edit the email and phone number via Edit Profile.
 - The migration process will move over the roles and the affiliated organization.



Migrating Existing User Accounts

Mitigation for Users with Existing Duplicate Accounts

The New Account Management functionality implements additional rules to enforce NSF's policy that states each user should only have one NSF ID account. The functionality will verify all email addresses are unique that are associated with an NSF ID.

When the user signs in, a check for uniqueness will be triggered on any email address(es) associated with the user. If the check returns duplicates, the user will receive a grace period to reconcile the accounts. The record(s) will be stored in a log for additional analysis to assist with the reconciliation process.

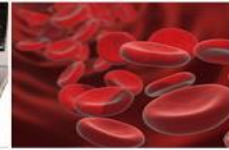
During the grace period, the user will have the capability to access "My Desktop" in Research.gov. Through "My Desktop" the user will have access to Fastlane Modules – Research Administration, and Proposal Awards and Status to continue proposal and award activities only.

The user will not have the ability to perform the following in the Fastlane modules:

- Edit account information
- Assign Roles for an organization
- Register a new organization
- Register as unaffiliated



WHERE DISCOVERIES BEGIN



NEW RESEARCH.GOV PROPOSAL PREPARATION AND SUBMISSION FUNCTIONALITY



Research.gov Proposal Preparation and Submission

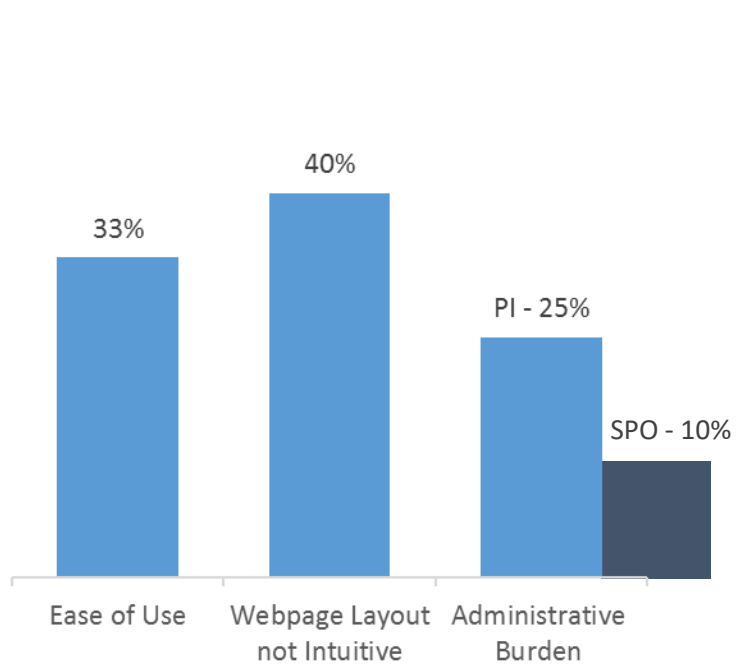
- Modernizes the applications supporting the proposal submission and merit review processes and ***improves the user experience*** via the development of a new application
- ***Reduces the administrative burden*** to the research community and NSF staff associated with preparation, submission, and management of proposals
- ***Increases efficiencies*** in proposal preparation, submission, and management
- ***Improves data quality*** and captures proposal content in a way that ***supports data analytics***
- ***Improves availability***, security, and flexibility of proposal preparation and submission IT systems



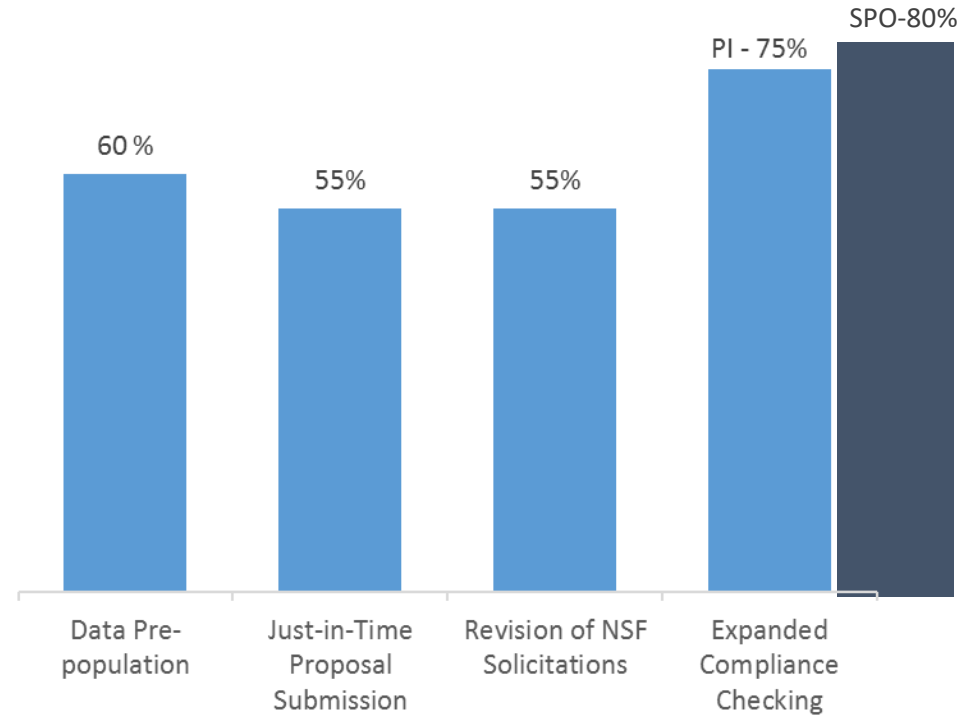
Why Are We Modernizing NSF’s Proposal Submission Capability

In June 2015, NSF surveyed PIs and SPOs about the proposal submission capabilities available in FastLane and used this feedback to target proposal submission modernization improvements.

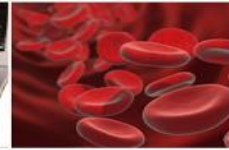
The Problem Statement



Suggestions for Potential Solutions



*Results based on 16,736 responses from the June 2015 survey sent to 116,638 members of the research community



How Might This Impact the Research Community?

- **Modernized Technology Will:**

- Improve the user experience with more intuitive interfaces and immediate feedback
- Reduce administrative burden with a dynamic interface that provides only relevant options



How Might This Impact NSF?

- **Modernized Technology Will:**
 - Increase automated compliance checking, reducing the number of proposals returned without review
 - Improve data quality of submissions
 - Increase resilience and security of proposal submission capability



February Preview and April Release Capabilities

The February preview allows PIs to:

- Initiate proposal
- Add Co-PIs, Senior Personnel, and AORs
- Upload required proposal documents
- Create budget
- Check compliance
- Enable SPO/AOR access for review

In April, the initial release will allow submission of Full, Research non-collaborative proposals, enabling the following features:

- AOR Submission
- PFU & Budget Revision

Subsequent releases will enable additional features



Some Frequently Asked Questions in the Preview

Where are the Academic and Summer months on the Budget?

- We've tried to simplify the budget. All person months can just be counted in the calendar months column

Where do I put my page numbers, the system says I can't use the margin?

- The system will automatically paginate the document for you, so no page numbers are required in the uploaded document

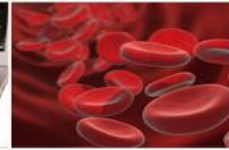
I keep getting font size and type issues on my upload!

- We are still tuning our compliance checking algorithm... Check all bullets, equations, captions, tables, super and subscripts.

In addition to screen instructions in the application, tips will also be provided on the FAQ page on Research.gov



WHERE DISCOVERIES BEGIN

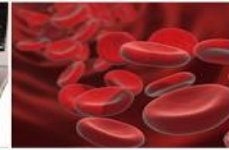


NSF AWARDS MANAGEMENT SYSTEM



NSF Awards Management System Modernization

- NSF is modernizing its current Awards Management System (Awards System).
- NSF has been reengineering the Awards System for the past two years and plans to continue modernization activities over the next two years.
- While the Awards System is largely an internal system used to approve awards, it is also the system that is used to send the official Award Notices.
- You may have noticed that the Award Notice for NSF-approved No Cost Extensions has changed.
- As part of the modernization, the Award Notice will be updated similar to the new NCE Notice.



New NSF-Approved No Cost Extension Award Notice

NATIONAL SCIENCE FOUNDATION Award Notice

Award Number (FAIN):

Amendment Number: 001

AWARDEE INFORMATION

Award Recipient:

Awardee Address:

Official Awardee Email Address:

Unique Entity Identifier (DUNS ID):

AMENDMENT INFORMATION

Amendment Type: No Cost Extensions

Amendment Date: 03/27/2018

Amendment Number: 001

Proposal Number: Not Applicable

Amendment Description:

The purpose of this amendment is to extend the end date from 08/31/2017 to 03/31/2018 without additional funds to allow for the completion of the agreed-to level of effort.

Except as modified by this amendment, the award conditions remain unchanged.

NSF CONTACT INFORMATION

The Managing Grants Official for this award can be found at <https://www.nsf.gov/bfa/dga/docs/liaison.pdf>

Awarding Official Name:

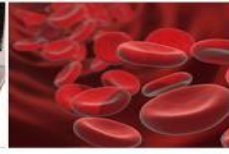
Awarding Official Email:

Managing Program Officer Name:

Managing Program Officer Email:



WHERE DISCOVERIES BEGIN





Next Steps and ERA Forum Resources

- Survey
 - <https://www.surveymonkey.com/r/NSF-ERASurvey>
- ERA Forum Email
 - If you are interested in participating in future application usability studies, please send an email with your contact information to nsferaforum@nsf.gov
- Subscribe to ERA Forum Listserv
 - Send an email to Nsf-era-forum-subscribe-request@listserv.nsf.gov
- NSF ERA Forum Website
 - https://www.nsf.gov/bfa/dias/policy/era_forum.jsp