

National Science Foundation

Electronic Research Administration (ERA)
Forum Webinar Series



September 28, 2016



Welcome to the NSF ERA Forum Webinar Series

- **Second ERA Forum Webinar Topic:** Proposal Submission Modernization
- **Focus:** Budget, Budget Justification and a new “Personnel” proposal section
- The agenda and presentation are available on the Policy website via the link below :
https://www.nsf.gov/bfa/dias/policy/era_forum.jsp

Agenda

- Introduction
- Forum Logistics
- ERA Forum Discussion Topics
- Questions and Answers
- Call to Action

ERA Forum

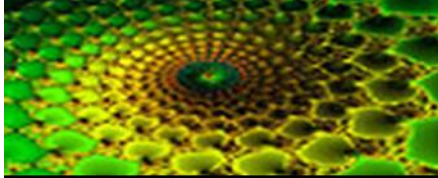
Background

- A new approach to regularly engaging the community

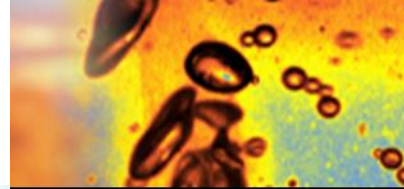
Purpose

- Collect individual opinions and perspectives on ERA activities
- Gather topics of interest for future forums
- Solicit volunteers for usability studies

Speakers



Office of Budget, Finance and
Award Management (BFA)



Office of Information and
Resource Management
(OIRM)

Erika Rissi

Deputy Division Director,
Division of Institution
and Award Support

Jean Feldman

Head, Policy Office,
Division of Institution
and Award Support

Jeff Vieceli

Head, Systems Office,
Division of Institution
and Award Support

William Daus

Project Manager,
Division of
Information Systems

WebEx Information

- USA/Canada, dial 1(888) 810-6840 or 1(517) 268-4521, enter passcode 4091853.
- Clearly state and spell your first name, last name and institution name to join in listen-only mode.
- For computer audio streaming, go to the URL:
<http://event.on24.com/r.htm?e=1256577&s=1&k=091E4E717CCAEEAABA7E5283ED6857BFC>
- To view real-time captions, go to www.fedrcc.us and enter event confirmation #3049769.
- **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.

How to engage with the ERA Forum

Forum Participation

WebEx Live Q&A

Survey

Future Forum Topics

Forum Listserv and Email

General Information



Live Q&A through WebEx

The screenshot displays the WebEx interface for a "Second ERA Forum" event. The top navigation bar includes "Participants", "Chat", and "Q&A" (highlighted with a red box). The main content area shows event information, including the host (Sophie Richard), audio connection details, and a list of attendees (Sophie Richard and Sophie Richard (me)). The Q&A section is visible at the bottom, with a dropdown menu set to "All (3)" and a text input field with a "Send" button (both highlighted with a red box).

- Click on the Q&A icon on the top-right corner.
- In the Q&A window, select “All panelists” to send your questions and comments.

Proposal Submission Modernization Initiative

History and Overview

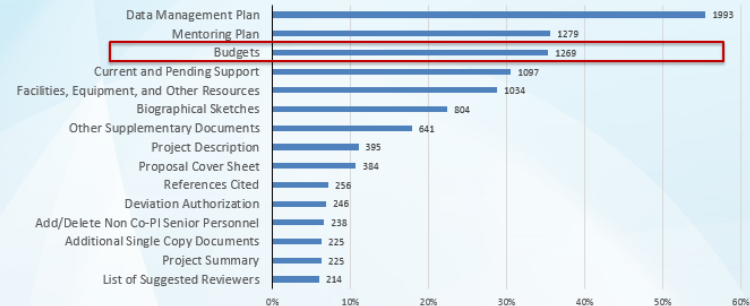
- Transitioning from FastLane to the new proposal modernization system

Prioritization of Today's ERA Forum Discussion Topics

- ERA Forum Survey Input
- Significance of Today's Discussion Topics
- Unreasonable Administrative Burden

PSM Survey – Burdensome Proposal Sections

"NSF is interested in reducing the unreasonable burden associated with proposal preparation. Of the following proposal sections/functions, please select up to three that place an unreasonable administrative burden on you during the proposal preparation p



*Respondents were prompted with the above question only if they indicated that NSF proposal processes present unreasonable administrative burden.

N=3,711

Current Online Budget Data Entry via FastLane

(First two pages of the online budget shown for illustration purposes)

Budget Year 1 for National Science Foundation

[A. Senior Personnel](#) | [B. Other Personnel](#) | [C. Fringe Benefits](#) | [D. Equipment](#) | [E. Travel](#) | [F. Participant Support Costs](#)
[G. Other Direct Costs](#) | [H. Total Direct Costs](#) | [I. Indirect Costs](#) | [J. Total Direct and Indirect Costs](#) | [K. Small Business Plan](#)
[Total Costs and Cost](#) [Button of Page](#)

A. Senior Personnel

| Name | Title | Calendar Months | Academic Months | Summer Months | Funds Requested By Proposer |
|----------------------------------|-----------------------------------|---------------------------------|---------------------------------|---------------------------------|--------------------------------|
| Alan Algham | <input type="text" value="None"/> | <input type="text" value="00"/> | <input type="text" value="00"/> | <input type="text" value="00"/> | <input type="text" value="0"/> |
| Total Senior Personnel: 1 | | | | | \$0 |

[Add/Remove Senior Personnel](#)

[Top of Page](#) | [Bottom of Page](#)

B. Other Personnel

| Number of Personnel | Type of Personnel | Calendar Months | Academic Months | Summer Months | Funds Requested By Proposer |
|---------------------------------|---|---------------------------------|---------------------------------|---------------------------------|--------------------------------|
| <input type="text" value="0"/> | Post Doctoral Scholars | <input type="text" value="00"/> | <input type="text" value="00"/> | <input type="text" value="00"/> | <input type="text" value="0"/> |
| <input type="text" value="0"/> | Other Professionals (Technicians, etc.) | <input type="text" value="00"/> | <input type="text" value="00"/> | <input type="text" value="00"/> | <input type="text" value="0"/> |
| <input type="text" value="0"/> | Graduate Students | | | | <input type="text" value="0"/> |
| <input type="text" value="0"/> | Undergraduate Students | | | | <input type="text" value="0"/> |
| <input type="text" value="0"/> | Secretarial - clerical | | | | <input type="text" value="0"/> |
| <input type="text" value="0"/> | Other | | | | <input type="text" value="0"/> |
| Total Other Personnel: 0 | | | | | \$0 |

Total Salaries and Wages (A + B): \$0

[Top of Page](#) | [Bottom of Page](#)

C. Fringe Benefits

| Description | Funds Requested By Proposer |
|---|--------------------------------|
| Fringe Benefits (if charged as direct costs) | <input type="text" value="0"/> |
| Total Salaries, Wages and Fringe Benefits (A + B + C): \$0 | |

List items and dollar amount for each item exceeding \$5000.

| Equipment Item | Check here to delete item | Dollar Amount | Funds Requested By Proposer |
|--------------------------|---------------------------|----------------------|-----------------------------|
| 1. <input type="text"/> | <input type="checkbox"/> | <input type="text"/> | <input type="text"/> |
| 2. <input type="text"/> | <input type="checkbox"/> | <input type="text"/> | <input type="text"/> |
| 3. <input type="text"/> | <input type="checkbox"/> | <input type="text"/> | <input type="text"/> |
| 4. <input type="text"/> | <input type="checkbox"/> | <input type="text"/> | <input type="text"/> |
| 5. <input type="text"/> | <input type="checkbox"/> | <input type="text"/> | <input type="text"/> |
| 6. <input type="text"/> | <input type="checkbox"/> | <input type="text"/> | <input type="text"/> |
| 7. <input type="text"/> | <input type="checkbox"/> | <input type="text"/> | <input type="text"/> |
| 8. <input type="text"/> | <input type="checkbox"/> | <input type="text"/> | <input type="text"/> |
| 9. <input type="text"/> | <input type="checkbox"/> | <input type="text"/> | <input type="text"/> |
| 10. <input type="text"/> | <input type="checkbox"/> | <input type="text"/> | <input type="text"/> |
| Total Equipment: | | | \$0 |

[Top of Page](#) | [Bottom of Page](#)

E. Travel

| Description | Funds Requested By Proposer |
|---|--------------------------------|
| 1. Travel Domestic (incl. U.S. Possessions) | <input type="text" value="0"/> |
| 2. Travel Foreign | <input type="text" value="0"/> |
| Total Travel: \$0 | |

[Top of Page](#) | [Bottom of Page](#)

F. Participant Support Costs

| Description | Costs | Funds Requested By Proposer |
|---|--------------------------------|-----------------------------|
| 1. Stipends | <input type="text" value="0"/> | <input type="text"/> |
| 2. Travel | <input type="text" value="0"/> | <input type="text"/> |
| 3. Subsistence | <input type="text" value="0"/> | <input type="text"/> |
| 4. Other | <input type="text" value="0"/> | <input type="text"/> |
| Number of Participants <input type="text" value="0"/> | | |
| Total Participant Support Costs: | | \$0 |

ERA Forum Discussion Topics

- Recap of Proposal Initiation Workflow
- Budget, Budget Justification and New “Personnel” section

PSM Vision

- Modernize the applications supporting the merit review process and the user experience via the development of a new application
- Reduce the administrative burden to the research community and NSF staff associated with preparation, submission, and management of proposals
- Increase efficiencies in proposal preparation, submission, and management
- Improve data quality
- Capture proposal content in a way that supports data analysis

PSM Agile Concept Development

Identify Pain Points and Draft Improvements

- Leverage helpdesk data, 2015 PSM survey, etc. to identify improvement opportunities and create initial concepts

Review Concepts with NSF Staff Working Group

- Review initial concepts and discuss at working group sessions
- Refine as needed

Review Wireframes with External Users

- Present and test wireframes with external users to validate and refine
- Usability sessions, FDP, ERA Forum, etc.

Internal Validation and Execution

- Brief working group, elevate/resolve issues and begin development
- Deliver enhancements incrementally



Online grants management for the NSF community

Research.gov is the modernization of FastLane, providing the next generation of grant management capabilities for the NSF research community.

[More](#)



Prepare & Submit Proposals

Prepare, submit and check status of proposals

- [Prepare Proposals](#)
- [Check Proposal Status](#)

FASTLANE PROPOSAL FUNCTIONS

- [Additional proposal functions](#)



Proposal/ Panel Review

Review proposals, participate in panels

FASTLANE PROPOSAL REVIEW

- [Proposal Review](#)

FASTLANE PANEL REVIEW

- [Panelist Functions](#)



Awards & Reporting

Submit project reports, notifications & requests

- [Project Reports](#)
- [Deposit Public Access Publication](#)
- [Example Project Reports \(Demo site\)](#)



Fellowships & Honorary Awards

Nominate colleagues, apply for awards

- [Graduate Research Fellowship Program \(GRFP\)](#)
- [Postdoctoral Fellowships and Other Programs](#)
- [Honorary Awards](#)

• Users access proposal preparation via Research.gov



Administration

Manage your account and user roles

- [User Management](#)

FASTLANE ORGANIZATION MANAGEMENT

- [Research Administration](#)



Manage Financials

View balances and submit cash requests

- [Submit or manage payment transactions](#)
- [More about ACMS](#)
- [Program Income Reporting](#)

NSF Award Highlights

- [Explore Scholarly publications in the NSF Public Access Repository \(NSF-PAR\)](#)
- [Search awards going back to 1994](#)



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

My Desktop > Proposal Preparation

Proposal Preparation

What would you like to work on?

Create New Proposal

Get started by answering a few questions to enable NSF to customize your proposal interface and compliance rules.

Create New Proposal

What information will need to be provided?

In Progress Proposals

Continue working on a previously created proposal, that has not yet been submitted to NSF.

Work with In Progress Proposals

0 In Progress Proposal(s)

Submitted Proposals

View, download or withdraw proposals that have previously been submitted to NSF.

View Submitted Proposals

0 Submitted Proposal(s)

• After logging in to Research.gov, the user may start a new proposal as well as access draft or submitted proposals

Create New Proposal

• Indicator shows required proposal setup process steps

1. Funding Opportunity

2. Where to Apply

3. Proposal Type

4. Submission Type

5. Title & Collaborative Info

Select Funding Opportunity

Show 10

Showing 1 to 10 of 288 | < < Prev 1 2 3 4 5 Next >

| Select | Funding Opportunity Number ⓘ | Funding Opportunity Title |
|-----------------------|------------------------------|---|
| <input type="radio"/> | NSF 16-1 | Grant Proposal Guide - GPG |
| <input type="radio"/> | NSF 16-570 | Origin of Life |
| <input type="radio"/> | NSF 16-569 | Origin of Life |
| <input type="radio"/> | NSF 16-568 | Division of Physics: Investigator-Initiated Research Projects |
| <input type="radio"/> | | GeoPRISMS Program |
| <input type="radio"/> | | Robert Noyce Teacher Scholarship Program |
| <input type="radio"/> | NSF 16-558 | Mathematical Sciences Postdoctoral Research Fellowships |
| <input type="radio"/> | NSF 16-556 | Tectonics |
| <input type="radio"/> | NSF 16-555 | Small Business Technology Transfer Program Phase I (STTR) |
| <input type="radio"/> | NSF 16-554 | Small Business Innovation Research Program Phase I |

• Opportunities may be filtered and/or sorted to aid selection

• Only “live” funding opportunities are available

Show 10

Showing 1 to 10 of 288 | < < Prev 1 2 3 4 5 Next >

Previous

Next

Create New Proposal

- Funding opportunity selection triggers customized options in subsequent screens

1. Funding Opportunity ✓

2. Where to Apply

3. Proposal Type

4. Submission Type

5. Title & Collaborative Info

Select Where to Apply

Select where within NSF you would like to send your proposal. Depending on the funding opportunity, you may make one or multiple selections. When you have saved your selection(s), click 'Next' to continue.

Funding Opportunity

NSF 16-1 - Grant Proposal Guide - GPG

Select Where to Apply ⓘ

Select Directorate

Direct For Biological Sciences (BIO) ▼

Select Division

Division Of Integrative Organismal Sys (IOS) ▼

Select Program

--Select One-- ▼

Save Selection

Saved Selections

Select your program on the left. Place selections in the order of importance.

Direct For Biological Sciences (BIO), Division Of Integrative Organismal Sys (IOS), ANIMAL BEHAVIOR



- Similar to today, users may be required to select the applicable UOC(s) (“where to apply”)

Previous

Next

Create New Proposal

1. Funding Opportunity ✓

2. Where to Apply ✓

3. Proposal Type

4. Submission Type

5. Collaborative Info & Title

Select Where to Apply

Your proposal will be directed to the following NSF Unit of Consideration. Click 'Next' to continue.

Funding Opportunity

NSF 16-556 - Tectonics

Directorate

Directorate For Geosciences (GEO)

Division

Division Of Earth Sciences (EAR)

Program

TECTONICS

- This is the same UOC screen, but with a different example funding opportunity.
- In such cases, the user simply validates the data before selecting “next”.

Previous

Next

Create New Proposal

1. Funding Opportunity ✓

2. Where to Apply ✓

3. Proposal Type

4. Submission Type

5. Title & Collaborative Info

Select Proposal Type

What type of proposal will be used? ⓘ

- Research
 - Rapid Response Research (RAPID) Proposals
 - Early-concept Grants for Exploratory Research (EAGER)
 - Research Advanced by Interdisciplinary Research and Engineering (RAISE)
 - Grant Opportunities for Academic Liaison with Industry (GOALI)
 - Ideas Lab
 - Facilitation Awards for Scientists and Engineers with Disabilities (FASSED)
 - Conferences
 - Equipment
 - Travel
 - NSF Center Proposals
 - Major Research Equipment and Facility Construction Proposals
 - Fellowship

- User chooses the applicable proposal type
- Again, the choices shown here will be customized to the funding opportunity

Previous

Next

Create New Proposal

1. Funding Opportunity ✓

2. Where to Apply ✓

3. Proposal Type ✓

4. Submission Type

5. Title & Collaborative Info

Select Submission Type

What would you like to prepare?

- Letter of Intent
- Preliminary Proposal
- Full Proposal
- Full Proposal related to a Preliminary Proposal
- Renewal
- Accomplishment Based Renewal

• After choosing the proposal type, the user indicates the proposal submission type

Previous

Next

Proposal - 7654321

Title: Save

Funding Opportunity: [NSF 16-505](#) - Faculty Early Career Development Program [\[Change\]](#)

Where to Apply: Biological Sciences (BIO) - Environmental Biology (DEB), Thermal Transport Processes [\[Change\]](#)

Proposal Type: Research Advanced by Interdisciplinary Research and Engineering (RAISE) [\[Change\]](#) Submission Type: Full Proposal [\[Change\]](#)

Proposal Actions

- [Allow SPO Access](#)
- [Check Proposal Compliance](#)
- [Print Proposal](#)
- [Delete Proposal](#)

Collaborative Proposal
Lead Proposal [\[Change\]](#)
Link(s): Not linked

- [Link Collaborative Proposals](#)

Personnel Access
Your role:
Principal Investigator (PI)
0 other user(s) have access

- [Manage Personnel](#)

| Proposal Sections | Last Updated | Compliance Status |
|---|--------------|-------------------|
| Required | | |
| Cover Sheet | | Not checked |
| Senior Personnel Documents ⓘ | | Not checked |
| Project Summary | | Not checked |
| Project Description | | Not checked |
| References Cited | | Not checked |
| Budgets | | Not checked |
| Budget Justification | | Not checked |
| Facilities | | Not checked |
| Data Management Plan | | Not checked |
| Collaboration Plan | | Not checked |
| Management Plan | | Not checked |

• Proposal access is managed via a separate action

Manage Personnel

Filter by Name, Role or Organization

- After navigating from the proposal forms page, the PI may add Co-PIs, Sr Personnel, and OAU's ("assistants") to the proposal
- Adding an individual to the proposal prompts an invitation to join the proposal process

Senior Personnel

Add Senior Personnel

Personnel Name

Role

Organization

Actions

Jane Smith

Principal Investigator

Brown University

[Change Role](#) | [Edit PI Profile](#)

Assistant(s)

Add Assistant

No assistants have been added

- OAU's are not expected to utilize a proposal PIN to access proposals

Add Senior Personnel

What role will the Senior Personnel be on the proposal?
 Co - Principal Investigator Other Senior Personnel

Search for Senior Personnel:

NSF ID OR Email

- The PI will perform a search by user ID or email address
- Unlike today, Other Senior Personnel need to be registered with NSF before being added to a proposal

Add Senior Personnel

What role will the Senior Personnel be on the proposal?
 Co - Principal Investigator Other Senior Personnel

Search for Senior Personnel:

NSF ID OR Email

| Select | Co-PI Name | NSF ID | Email | Organization |
|----------------------------------|----------------|----------|------------------|------------------|
| <input checked="" type="radio"/> | Samantha Jones | 33333333 | s*****@*****.edu | Brown University |

- The user validates the individual's identity and formally adds her to the proposal

Manage Personnel

Senior Personnel

[Add Senior Personnel](#)

| Personnel Name | Role | Organization | Actions |
|----------------|------------------------|------------------|--|
| Jane Smith | Principal Investigator | Brown University | Change Role Edit PI Profile |
| Samantha Jones | Other Senior Personnel | Brown University | Change Role Remove from Proposal |

Assistant(s)

[Add Assistant](#)

No assistants have been added



From: PSMemail@nsf.gov

Date: August 3, 2016

Subject: You have been added to a proposal

- The added individual may receive a notification that s/he has been added to a NSF proposal

Jane Smith has added you, in the role of Other Senior Personnel, to the following proposal:

7654321 - Supporting Faculty in Quantitative Undergraduate Biology Education and Synthesis

Please sign into Research.gov where the proposal will be available from your listing of In Progress proposals.

[Sign into Research.gov](#)

If you feel this request is in error, please click the link below to

[Please remove me from this proposal](#)

- S/he may remove herself/himself from the proposal

Proposal Preparation

What would you like to work on?

- The added Co-PI could be notified via an automatic alert and/or auto-generated email

Create New Proposal

Get started by answering a few questions to enable NSF to customize your proposal interface and compliance rules.

Create Proposal

 What information will need to be provided?

In Progress Proposals

Continue working on a previously created proposal, that has not yet been submitted to NSF.

Work with In Progress Proposals

3 In Progress Proposals are available

Submitted Proposals

View, download or withdraw proposals that have previously been submitted to NSF.

View Submitted Proposals

0 Submitted Proposals are available

Proposal Alerts

- Similar to today, co-PIs and OAU's would continue to have full proposal access
- Other Senior Personnel would also have system access



Alert

You have been added to proposal 7654321 - Supporting Faculty in Quantitative Undergraduate Biology Education and Synthesis, as Other Senior Personnel 7/25/2016

Actions

[View / Edit Proposal](#)
[Decline Invitation](#)

Proposal - 7654321

Title: Save

Funding Opportunity: [NSF 16-505](#) - Faculty Early Career Development Program [\[Change\]](#)

Where to Apply: Biological Sciences (BIO) - Environmental Biology (DEB), Thermal Transport Processes [\[Change\]](#)

Proposal Type: Research Advanced by Interdisciplinary Research and Engineering (RAISE) [\[Change\]](#) Submission Type: Full Proposal [\[Change\]](#)

Proposal Actions

- Allow SPO Access
- Check Proposal Compliance
- Print Proposal
- Delete Proposal



Collaborative Proposal Lead Proposal [\[Change\]](#)
Link(s): Not linked

- Link Collaborative Proposals



Personnel Access
Your role: Principal Investigator (PI)
1 other user(s) have access

- Manage Personnel

| Proposal Sections | Last Updated | Compliance Status |
|--|--------------|-------------------|
| Required | | |
| Cover Sheet | | |
| Senior Personnel Documents | | |
| Project Summary | | Not checked |
| Project Description | | Not checked |
| References Cited | | Not checked |
| Budgets | | Not checked |
| Budget Justification | | Not checked |
| Facilities, Equipment, and Other Resources | | Not checked |
| Data Management Plan | | Not checked |
| Collaboration Plan | | Not checked |
| Management Plan | | Not checked |

• Within this new section is a listing of all person-specific proposal documents

Senior Personnel Documents

Expand all | Collapse all

Filter by Name, Role or Organization

Manage Personnel

- This layout allows a singular view of all documents required for each named senior project personnel

| Personnel Name | Role | Organization |
|--|------------------------|--------------------------|
| Jane Smith | Principal Investigator | Brown University |
| Documents | Last Updated | Compliance Status |
| Biographical Sketch | | |
| Current & Pending | 09/07/2016 | Error(s) |
| Results from Prior NSF Support | | |
| Collaborators & Other Affiliations | 08/30/2016 | No issues |
| Samantha Jones | Other Senior Personnel | Brown University |

- Results from Prior NSF Support has been separated from the Project Description

Check Compliance

Preview / Print

Proposal - 7654321

Title: Save

Funding Opportunity: [NSF 16-505](#) - Faculty Early Career Development Program [\[Change\]](#)

Where to Apply: Biological Sciences (BIO) - Environmental Biology (DEB), Thermal Transport Processes [\[Change\]](#)

Proposal Type: Research Advanced by Interdisciplinary Research and Engineering (RAISE) [\[Change\]](#) Submission Type: Full Proposal [\[Change\]](#)



Proposal Actions

[Allow SPO Access](#)

[Check Proposal Compliance](#)

[Print Proposal](#)

[Delete Proposal](#)

Collaborative Proposal

Lead Proposal [\[Change\]](#)

Link(s): Not linked

[Link Collaborative Proposals](#)

Personnel Access

Your role:
Principal Investigator (PI)

1 other user(s) have access

[Manage Personnel](#)

| Proposal Sections | Last Updated | Compliance Status |
|--|--------------|-------------------|
| Required | | |
| Cover Sheet | | Not checked |
| Senior Personnel Documents | | Not checked |
| Project Summary | | Not checked |
| Project Description | | Not checked |
| References Cited | | Not checked |
| Budgets | | Not checked |
| Budget Justification | | Not checked |
| Facilities, Equipment, and Other Resources | | Not checked |
| Data Management Plan | | Not checked |
| Collaboration Plan | | Not checked |
| Management Plan | | Not checked |

Proposal - 7654321

Title: Supporting Faculty in Quantitative Undergraduate Biology Education and Synthesis [[Change](#)]

Funding Opportunity: NSF 16-505 [↗](#) - Faculty Early Career Development Program [[Change](#)]

Where to Apply: Biological Sciences (BIO) - Environmental Biology (DEB), Thermal Transport Processes [[Change](#)]

Proposal Type: Research Advanced by Interdisciplinary Research and Engineering (RAISE) [[Change](#)] **SubmissionType:** Full Proposal [[Change](#)]

Proposal Actions

[Allow SPO Access](#)

[Check Proposal Compliance](#)

[Print Proposal](#)

[Delete Proposal](#)

Collaborative Proposal Lead Proposal [[Change](#)]

Link(s): Not linked

[Link Collaborative Proposals](#)

Personnel Access

Your role:
Principal Investigator (PI)

3 other user(s) have access

[Manage Personnel](#)

| Proposal Sections | Status | Last Updated | Compliance Status |
|---|-----------------------------------|--------------|-------------------|
| Required | | | |
| Cover Sheet | <input type="radio"/> Not started | | Not checked |
| Senior Personnel Documents 1 | <input type="radio"/> Not started | | Not checked |
| Project Summary | <input type="radio"/> Not started | | Not checked |
| Project Description | <input type="radio"/> Not started | | Not checked |
| References Cited | <input type="radio"/> Not started | | Not checked |
| Budgets | | | Not checked |
| Budget Justification | | | Not checked |
| Facilities, Equipment, and Other | | | Not checked |
| Data Management Plan | <input type="radio"/> Not started | | Not checked |
| Collaboration Plan | <input type="radio"/> Not started | | Not checked |
| Management Plan | <input type="radio"/> Not started | | Not checked |

• Budget and Budget Justification are separate sections in PSM

Helpful Links

My Desktop > Proposal Preparation > Propo

Budgets
For Organization 1

Expand all rows | Collapse all rows

Required

- Cover Sheet
- Personnel and Associated Documents
- Project Summary
- Project Description
- References Cited
- > Budgets
- Collaboration Plan
- Management Plan

Conditionally Required

- Postdoctoral Mentoring Plan
- Deviation Authorization

Optional

- Letters of Collaboration
- RUI Impact Statement
- Suggested Reviewer List

\$ 73,800
Total Requested Amount

Add Year

| Direct Costs | Year 1 | | Total Funds Requested |
|--|--------|------------------|-----------------------|
| | Months | Funds | |
| A. Senior Personnel | | \$ 50,000 | \$ 50,000 |
| Jane Smith | 12 | \$ 20,000 | \$ 20,000 |
| Terri Demo | 12 | \$ 20,000 | \$ 20,000 |
| Helen Anderson | 9 | \$ 10,000 | \$ 20,000 |
| B. Other Personnel | | \$ 16,000 | \$ 16,000 |
| 1 Postdoctoral Scholars | 12 | \$ 12,000 | \$ 12,000 |
| 0 Other Professionals | | \$ | \$ 0 |
| 2 Graduate Students | | \$ 4,000 | \$ 4,000 |
| 0 Undergraduate Students | | \$ | \$ 0 |
| 0 Secretarial - Clerical | | \$ | \$ 0 |
| 0 Other | | \$ | \$ 0 |
| C. Fringe Benefits | | \$ 500 | \$ 500 |
| | | \$ 500 | |
| Total Salaries, Wages & Fringe Benefits (A-C) | | \$ 66,500 | \$ 66,500 |
| D. Equipment (over \$5000) | | \$ 5350 | \$ 5350 |
| 1 Measuring instrument | | \$ 5350 | \$ 5350 |

• The budget automatically displays Year 1. User may add additional years

• The concept of person-months has been streamlined

• This screenshot does not capture all line items, though they largely replicate FastLane.

Budgets

For Organization 1

\$ 68,800

Total Requested Amount

Expand all | Collapse all

Add Year

Delete Year

Direct Costs

A. Senior Personnel

Smith
Memo
Anderson

B. Other Personnel

1 Postdo
0 Other F
2 Gradua
0 Undergraduate Students
0 Secretarial - Clerical
0 Other

C. Fringe Benefits

Total Salaries, Wages & Fringe Benefits (A-C)

D. Equipment

1 Measuring instrument

Add Year

Add a new year to the budget by choosing a selection below.

Add New Year

- Add blank year
 Copy from existing year

Select year to copy

Year 1

Add Year

Close

- After choosing to add a year to the budget, the user chooses whether to copy prior year data.

- The new budget can display all project years on one screen or filter to show select years.

Budgets

For Organization 1

\$ 147,600

Total Requested Amount

Expand all rows | Collapse all rows

Show columns: Year 1 Year 2

Add Year

Delete Year

| Direct Costs | Year 1 | | Year 2 | | Total Funds Re |
|--|--------|-----------|--------|-----------|----------------|
| | Months | Funds | Months | Funds | |
| A. Senior Personnel | | \$ 50,000 | | \$ 50,000 | \$ 100,000 |
| Jane Smith | 12 | \$ 20,000 | 12 | \$ 20,000 | \$ 40,000 |
| Terri Demo | 12 | \$ 20,000 | 12 | \$ 20,000 | \$ 40,000 |
| Helen Anderson | 9 | \$ 10,000 | 9 | \$ 10,000 | \$ 20,000 |
| B. Other Personnel | | \$ 16,000 | | \$ 16,000 | \$ 32,000 |
| 1 Postdoctoral Scholars | 12 | \$ 12,000 | 12 | \$ 12,000 | \$ 24,000 |
| 0 Other Professionals | | \$ | | \$ | \$ 0 |
| 2 Graduate Students | | \$ 4,000 | | \$ 4,000 | \$ 8,000 |
| 0 Undergraduate Students | | \$ | | \$ | \$ 0 |
| 0 Secretarial - Clerical | | \$ | | \$ | \$ 0 |
| 0 Other | | \$ | | \$ | \$ 0 |
| C. Fringe Benefits | | \$ 500 | | \$ 500 | \$ 1000 |
| | | \$ 500 | | \$ 500 | |
| Total Salaries, Wages & Fringe Benefits (A-C) | | \$ 66,500 | | \$ 66,500 | \$ 133,000 |
| D. Equipment (over \$5000) | | \$ 5350 | | \$ 5350 | \$ 10,700 |
| 1 Measuring instruments | | \$ 5350 | | \$ 5350 | \$ 10,700 |
| + Add Equipment | | | | | |
| E. Travel | | \$ 1000 | | \$ 1000 | \$ 2000 |

- Budget numbers are summed at the top-right box, far right column, and bottom of budget

- Budget data may be viewed at the category level or at a more detailed level

- NSF is exploring other methods of supporting the budget input - like a wizard

- After clicking on the budget, the user could be given the option of engaging a wizard of proceeding to the main input screen

Navigation Link 3

Get Started on the Budget

Select the way you would like to enter your budget information. The guided option is recommended if this is your first time filling out the form. If you change your mind, it's easy to switch to the other view at any time.

Walk step-by-step through a guided questionnaire to enter your budget

Guide Me

Enter your budget information directly into the form.

Go to Form

Don't show this message again

Close

| | | | | |
|----------------------------|---|---------|----|-------------------------|
| Organization 3 | 1 | \$ 0.00 | -- | Copy Year Delete Year |
| + Add Year | 2 | \$ 0.00 | -- | Copy Year Delete Year |

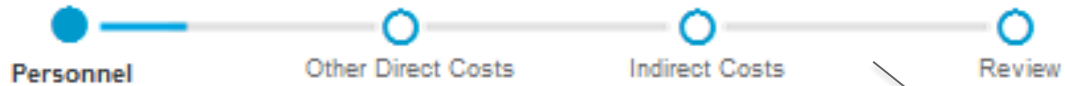
Budget Year 1

For Organization 1

Switch to
Form View

\$ 1200

Total Requested Amount



• User is provided visual of budget progress

Personnel
Personnel listed for this proposal.

Note:
If you need to add additional personnel, please go to the Personnel

• At any time user could switch to a traditional form view

| Name | Job Title | Calendar Months | = | Academic Months | + | Summer Months | Funds Requested |
|----------------|----------------------|----------------------|---|----------------------|---|----------------------|-------------------------|
| Helen Anderson | <input type="text"/> | <input type="text"/> | = | <input type="text"/> | + | <input type="text"/> | \$ <input type="text"/> |
| Adam Jones | <input type="text"/> | <input type="text"/> | = | <input type="text"/> | + | <input type="text"/> | \$ <input type="text"/> |
| Derek Rogers | <input type="text"/> | <input type="text"/> | = | <input type="text"/> | + | <input type="text"/> | \$ <input type="text"/> |

Save

Check Budget

Preview / Print
Budget

Previous

Next



Budget

For Organization 1

Instructions to upload Budget:

- Only 1 document can be uploaded
- Accepted file types include: Excel documents, etc.
- Images and other media are not permitted

Help with Budget

 [Microsoft Excel template \(optional\)](#)

Browse for file to upload

Browse ...

Upload

Cancel

- NSF could also support a spreadsheet or template upload
- The uploaded document could be processed and integrated into the table interface for final validation.



Budget Justification

For Organization 1

| Direct Costs | Year 1 Months | Funds | Year 2 Months | Funds | Total Funds Requested |
|----------------------------|------------------|-----------|------------------|-----------|-----------------------|
| A. Senior Personnel | | \$ 50,000 | | \$ 50,000 | \$ 101,000 |
| Jane Smith | 12 | \$ 20,000 | 12 | \$ 20,000 | \$ 40,000 |
| Terri Demo | 12 | \$ 20,000 | 12 | \$ 20,000 | \$ 40,000 |
| Helen Anderson | 9 | \$ 10,000 | 9 | \$ 10,000 | \$ 20,000 |
| Alex Roberts | | \$ 0 | | \$ 1000 | \$ 1000 |

Budget Justification

Part time salary for three faculty members is requested to allow these personnel sufficient time to design and test the cell biologically focused modules and to coordinate the training workshop for fellow GGC faculty members and dissemination workshops (Objectives 1 and 4 and Dissemination Plan). The amount requested for each co-PI is 10% of the base salary for a mid-level Assistant Professor at Brown University. The co-PI will have the primary responsibility for designing and piloting the cell biologically focused modules, for workshop organization and coordination.

| | | | | | |
|---------------------------|----|-----------|----|-----------|-----------|
| B. Other Personnel | | \$ 16,000 | | \$ 16,000 | \$ 32,000 |
| 1 Postdoctoral Scholars | 12 | \$ 12,000 | 12 | \$ 12,000 | \$ 24,000 |
| 2 Graduate Students | | \$ 4000 | | \$ 4000 | \$ 4000 |

Budget Justification

Part time salary is requested for 1 postdoctoral scholar and 2 graduate students to allow sufficient time to assist the other researchers with running the training and dissemination workshops. The postdoctoral scholar will take the lead on coordinating the recruitment, and marketing the workshop. While the graduate students will be engaged with tasks around setting up the workshop, and supporting the needs of the other researchers.

- The Budget Justification provides a visual reminder of the data saved in the Budget

- The visual is meant to remind users to provide a justification for each applicable budget category

- Modern text boxes would enable easier cut-and-pasting and formatting

- Where a budget category includes a funds request, the user is required to provide text

2016 - 2017 Notional Timeline (Subject to change)



Call to Action and ERA Forum Resources

Survey

https://www.surveymonkey.com/r/PSM_ERA_Forum

ERA Forum Email

Send an email 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

Q&A