

National Science Foundation

Electronic Research Administration (ERA)
Forum Webinar Series

March 15, 2017



Welcome to the NSF ERA Forum Webinar Series

- ERA Forum Webinar Topic: Proposal Submission Modernization (PSM)
- Focus: Sponsored Projects Office (SPO) and Authorized Organizational Representative (AOR) Access and Activities
- The agenda and presentation are available on the Policy Office website via this link:
https://www.nsf.gov/bfa/dias/policy/era_forum.jsp

Agenda

- Introduction
- Forum Webinar Logistics
- Forum Webinar Discussion Topics
 - SPO and AOR Access and Activities
 - Forum Webinar Topic Priority: Proposal Automated Compliance Checking
- Questions and Answers
- Next Steps

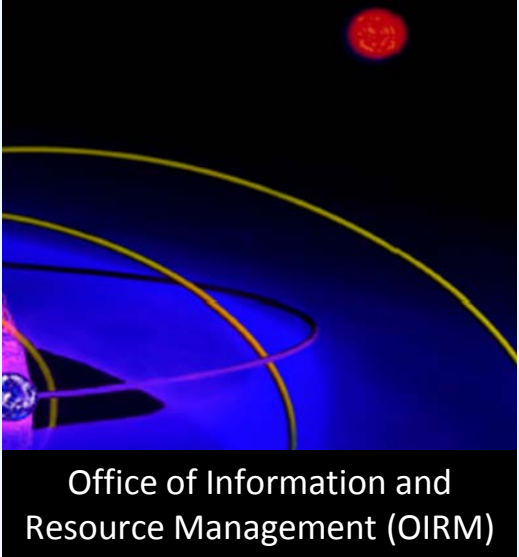
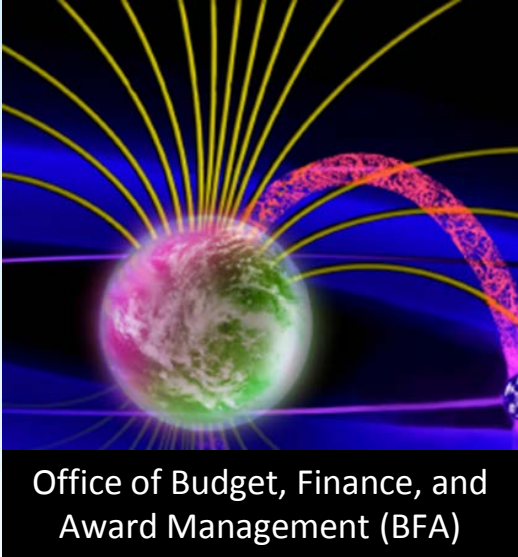
ERA Forum

Background and Purpose

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

- **April 2016 Forum Webinar:** PSM Initiative
 - Tailoring the Proposal Interface
 - Overview and Demonstration of the Proposal Initiation Wizard
- **September 2016 Forum Webinar:** PSM Initiative
 - Recap of the Proposal Initiation Workflow
 - Demonstration of Budget, Budget Justification, and new “Personnel” Proposal Sections

Speakers



Maria
Koszalka

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

Jeremy
Leffler

—
Outreach Specialist,
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 (877) 951-7311 or 1 (203) 607-0666, enter passcode 8458589
- Clearly state and spell your first name, last name and institution name to join in listen-only mode
- To view real-time captions, go to www.fedrcc.us and enter event confirmation #3212183
- **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

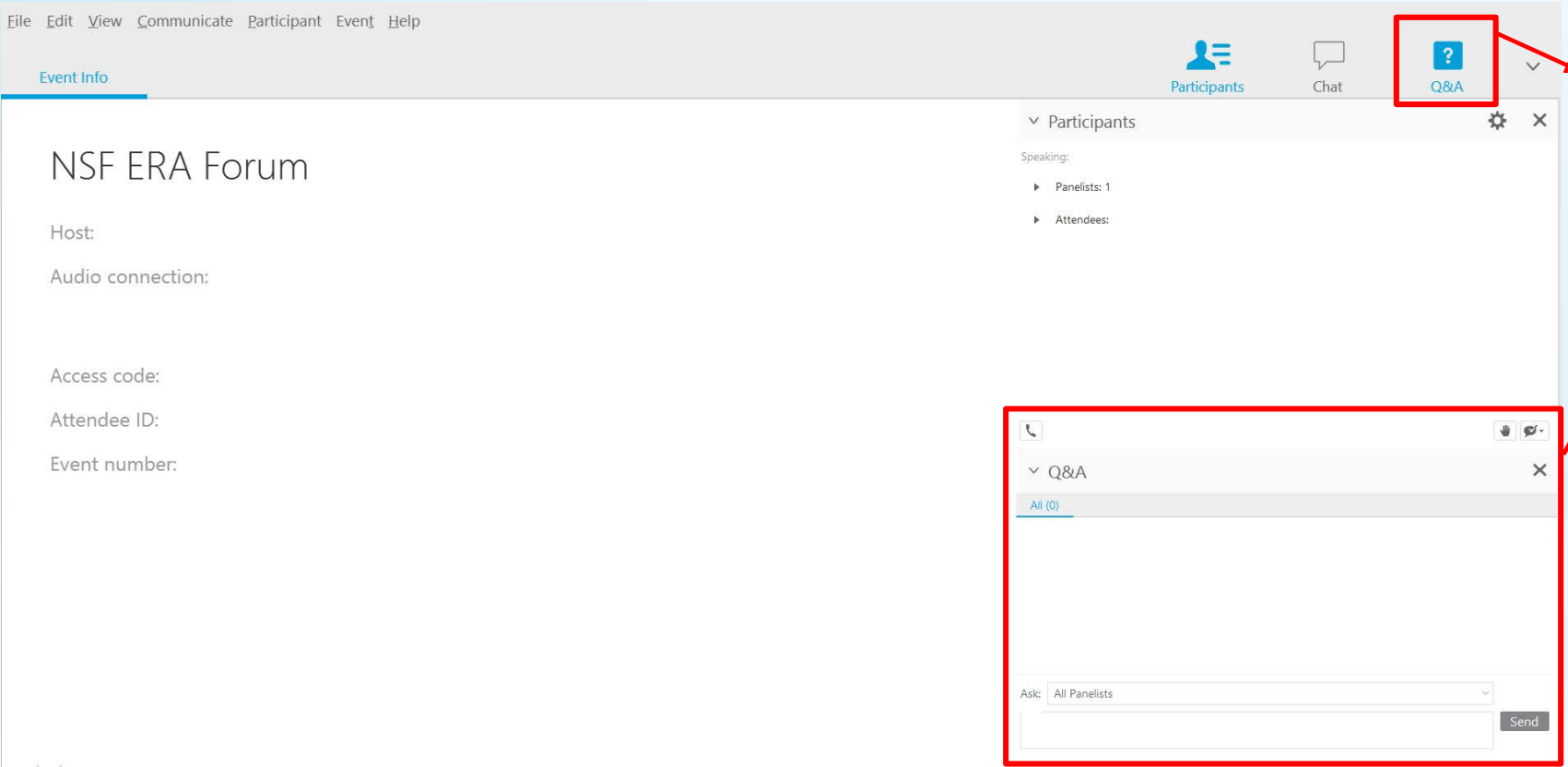
How to Engage with the Forum

Forum Participation

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



Live Q&A Through WebEx



- 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

Prioritization of Today's ERA Forum Discussion Topics

- Significance of Today's Discussion Topics
- Unreasonable Administrative Burden
- Forum Interest

ERA Forum Discussion Topics

- SPO and AOR Access and Activities
- Forum Webinar Topic Priority: Proposal Automated Compliance Checking

Proposal Submission Modernization Initiative

History and Overview

- Transitioning from FastLane to the new proposal modernization system

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

Concept: SPO or AOR Accessing In-Progress Proposal



FastLane is an interactive real-time system used to conduct NSF business over the Internet. FastLane is for official NSF use only. [More About FastLane...](#)

**FastLane
User
Support**

(7 AM to 9 PM Eastern Time • M-F)
1-800-673-6188
FastLane Availability (recording):
1-800-437-7408

- [Proposals, Awards and Status](#) | [Proposal Review](#) | [Panelist Functions](#) | [Research Administration](#) | [Financial Functions](#)
- [Honorary Awards](#) | [Graduate Research Fellowship Program](#) | [Postdoctoral Fellowships and Other Programs](#)

Quick Links

- [Instructions for Research Administration](#)
- [New Organization Registration](#)
- [EDI Proposal Preparation](#)
- [Use of NSF ID](#)
- [FastLane Proposal Preparation and Submission Guide \(7.1MB PDF\)](#)
- [Grant Proposal Guide](#)

Research Administration

Login for the following permission based functions:

- ▶ Accounts Management
- ▶ Letters of Intent
- ▶ Proposals/Supplements/File Updates/Withdrawals
- ▶ Award Documents
- ▶ Forwarded/Submitted Revised Budgets
- ▶ Notifications & Requests
- ▶ Organizational Reports
- ▶ Project Reports – Disabled in FastLane. Log in to [Research.gov](#)

SPO/AOR users review proposals via Research Administration (RAM)

Log In

Last Name:	<input type="text" value="alphaman"/>
NSF ID:	<input type="text" value="....."/>
Privacy Act	
Password:	<input type="password" value="....."/>

Select one:

- Research Administration
- Submit EDI Proposals

[Forgot Password?](#)
[Lookup NSF ID](#)

Proposals / Supplements / File Updates / Withdrawals | MAIN ▶

Organization: NSF Cayuse Test Organization

[Documents in Progress](#) | [Withdrawals in Progress](#) | [Submitted Documents](#)

Search for Proposal Documents in Progress by Temporary Proposal ID and/or PI Last Name:

Temporary Proposal ID:
(Enter 7 digits)

PI Last Name:
(Enter at least first two characters)

Search

All Documents

FastLane will automate the enforcement of deadline dates. Proposers should allow sufficient time to submit proposals before 5 PM submitter's local time on the deadline date(s) shown below or they risk not being able to submit their proposal to NSF.

Click on Temp ID to view the Proposal Document. Sort results by clicking the column title.

64 Documents found, displaying 1 to 10

[Prev] 1, 2, 3, 4, 5, 6, 7 [Next]

Temp ID	Deadline Date	Type	Access Level	PI Name	Proposal Title	Check	Edit	Submit	Return to PI
1234567	2/15/2017	Proposal	View/Edit/Submit	Demo, Terry	Collaborative Research: Supporting Faculty in Quantitative Undergraduate Biology Education and Synthesis				
1224612	3/01/2017	Proposal	View/Edit/-	Demo, Terry	CAREER: Investigating the evolution of gene regulation at Drosophila Hox genes	Check	Edit		Return to PI
1246258	3/15/2017	Proposal	View/Edit/-	Demo, Terry	RCN-UBE - GCAT-SEEK: The Genome Consortium for Active Undergraduate Research and Teaching Using Next-Generation Sequencing	Check	Edit		Return to PI
1316689	3/15/2017	Proposal	View/Edit/Submit	Demo, Terry	Energy, Power, Control, and Networks (EPCN)	Check	Edit	Submit	Return to PI
1324527	6/10/2017	Proposal	View/Edit/Submit	Alphaman, Alan	Electronics, Photonics and Magnetic Devices (EPMO)	Check	Edit	Submit	Return to PI
1324612		Supplement	View/Edit/Submit	Alphaman, Alan	Energy, Power, Control, and Networks (EPCN)	Check	Edit	Submit	Return to PI
1346258		Supplement	View/Edit/Submit	Alphaman, Alan	Management and Operation of the National Geophysical Observatory for Geoscience (NGEO)	Check	Edit	Submit	Return to PI
1416689		Supplement	View/Edit/Submit	Alphaman, Alan	CAREER: Investigating the evolution of gene regulation at Drosophila Hox genes	Check	Edit	Submit	Return to PI
1424527		Supplement	View/Edit/Submit	Alphaman, Alan	Management and Operation of the National Geophysical Observatory for Geoscience (NGEO)	Check	Edit	Submit	Return to PI
1516689		Supplement	View/Edit/Submit	Alphaman, Alan	RCN-UBE - GCAT-SEEK: The Genome Consortium for Active Undergraduate Research and Teaching Using Next-Generation Sequencing	Check	Edit	Submit	Return to PI

Transfer data to: [Excel](#)

Cancel

Download [Adobe Acrobat Reader](#) for viewing PDF files

Link to access proposal in PSM

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

Proposal - 1234567

Proposal Title: Collaborative Research: Supporting Faculty in Quantitative Undergraduate Biology Education and Synthesis [Change]

Funding Opportunity: NSF 16-505 [Change] - 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]

Research.gov is opening a new window with your proposal...

Proposal Sections	Last Updated	Compliance Status
Required		
Cover Sheet	10/13/2016	✓ No issues found
Project Summary	10/13/2016	✓ No issues found
Project Description	10/13/2016	✓ No issues found
References Cited	10/13/2016	✓ No issues found
Data Management Plan	10/13/2016	✓ No issues found
Postdoctoral Mentoring Plan (conditionally required)	10/13/2016	✓ No issues found
Senior Personnel Descriptions	10/13/2016	✓ No issues found
Facilities, Equipment, and Other Resources	10/13/2016	✓ No issues found
Collaboration Plan	10/13/2016	✓ No issues found
Management Plan	10/13/2016	✓ No issues found
Budgets	10/13/2016	✓ No issues found
Budget justification	10/13/2016	✓ No issues found
Deviation Authorization (conditionally required)		Not checked
Optional		
Letters of Collaboration		Not checked
ROI Impact Statement		Not checked
Suggested Reviewer List	10/13/2016	✓ No issues found

Proposal Actions

- Submit Proposal
- Check Proposal Compliance
- Print Proposal
- Return to PI

Personnel Access

Your role: Authorized Organizational Representative (AOR)

4 other user(s) have access

Manage Personnel

Collaborative Status

Lead proposal [Change]

Link(s): 2222333

Link Collaborative Proposals

Helpful Links

- View submitted proposals
- Contact IT Help Center
- Proposal and Award Policies and Procedures Guide (PAPPG)

(Loading Proposal Forms page for selected proposal in new window)

Proposal - 1234567

Proposal Title: Collaborative Research: Supporting Faculty in Quantitative Undergraduate Biology Education and Synthesis
Funding Opportunity: [NSF 16-505](#) - Faculty Early Career Development Program
Where to Apply: Biological Sciences (BIO) - Environmental Biology (DEB), Thermal Transport Processes
Proposal Type: Research Advanced by Interdisciplinary Research and Engineering (RAISE)
Submission Type: Full Proposal

Proposal Actions

[Submit Proposal](#)

[Check Proposal Compliance](#)

[Print Proposal](#)

[Return to PI](#)

Personnel Access

Your role: Authorized Organizational Representative (AOR)
 4 other user(s) have access

[Manage Personnel](#)

Collaborative Status

Lead proposal
 Link(s): [2222333](#)

[Link Collaborative Proposals](#)

Helpful Links

[View submitted proposals](#)

[Contact IT Help Central](#)

[Proposal and Award Policies and Procedures Guide \(PAPPG\)](#)

Proposal Sections	Last Updated	Compliance Status
Required		
Cover Sheet	10/13/2016	✔ No issues found
Project Summary	10/13/2016	✔ No issues found
Project Description	10/13/2016	✔ No issues found
References Cited	10/13/2016	✔ No issues found
Data Management Plan	10/13/2016	✔ No issues found
Postdoctoral Mentoring Plan (conditionally required)	10/13/2016	✔ No issues found
Senior Personnel Documents	10/13/2016	✔ No issues found
Facilities, Equipment, and Other Resources	10/13/2016	✔ No issues found
Collaboration Plan	10/13/2016	✔ No issues found
Management Plan	10/13/2016	✔ No issues found
Budgets	10/13/2016	✔ No issues found
Budget Justification	10/13/2016	✔ No issues found
Deviation Authorization (conditionally required)		Not checked
Optional		
Letters of Collaboration		Not checked
RUI Impact Statement		Not checked
Suggested Reviewer List	10/13/2016	✔ No issues found

Access to proposal sections and associated functions based on permissions

Research.GOV

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[Part I: Grant Proposal Guide \(GPG\)](#)
[Part II: Award & Administration Guide \(AAG\)](#)

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Concept: AOR Submitting In-Progress Proposal

Submit Proposal

1. Review Proposal Information

2. Proposal Certifications

3. Sign & Submit

Review Proposal Information

[View full proposal](#)

Proposal Information

Title of Proposed Project Supporting Faculty in Quantitative Undergraduate Biology Education and Synthesis			Proposal Identification Number 1234567	
Funding Opportunity: NSF 16-505 - Faculty Early Career Development Program			Due Date 12/15/2016	
For consideration by NSF Organization Unit(s) Biological Sciences (BIO) - Environmental Biology (DEB), Thermal Transport Processes			Other Federal Agencies to which this proposal will be submitted none	
Submission Type Full Proposal	Requested Amount \$43,878	Proposed Duration 36 months	Starting Date 04/01/2016	Employer Identification Number 04/01/2016

Awardee Organization Information

Name of Organization to which award should be made National Science Foundation	Awardee Organization Address NSF 4201 Wilson Boulevard Arlington, VA 22230-1000
Awardee Organization Code 4102853000	

Senior Personnel Information

Principal Investigator (PI) / PD Department Physics Department	Principal Investigator (PI) / PD Address Brown University 8201 Salem Boulevard Providence, RI 12330-1000
---	---

Personnel Name	Role	Highest Degree Year	Phone	Email
Jane Smith	Principal Investigator	PhD	401-123-1234	jsmith@brown.edu
Terry Demo	Co - Principal Investigator	PhD	401-234-2345	tdemo@brown.edu
Jeff Stellar	Other Senior Personnel	MA	401-345-3456	jstellar@brown.edu

[Previous](#)
[Next](#)

Step 1: AOR reviews
key proposal
information

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

Proposal - 1234567 > Submit Proposal

Submit Proposal

1. Review Proposal Information ✓ 2. Proposal Certifications 3. Sign & Submit

Proposal Certifications

* Required field

Certification for Authorized Organizational Representative (or Equivalent) or Individual Applicant
By electronically signing and submitting this proposal, the Authorized Organizational Representative (AOR) or Individual Applicant is: (1) certifying that statements made herein are true and complete to the best of his/her knowledge; and (2) agreeing to accept the obligation to comply with NSF award terms and conditions if an award is made as a result of this application. Further, the applicant is hereby providing certifications regarding conflict of interest (when applicable), drug-free workplace, debarment and suspension, lobbying activities (see below), nondiscrimination, flood hazard insurance (when applicable), responsible conduct of research, organizational support, Federal tax obligations, unpaid Federal tax liability, and criminal convictions as set forth in the NSF Proposal & Award Policies & Procedures Guide, Part I: the Grant Proposal Guide (GPG). Willful provision of false information in this application and its supporting documents or in reports required under an ensuing award is a criminal offense (U. S. Code, Title 18, §1001).

Certification Regarding Conflict of Interest
The AOR is required to complete certifications stating that the organization has implemented and is enforcing a written policy on conflicts of interest (COI), consistent with the provisions of AAG Chapter IV.A.; that, to the best of his/her knowledge, all financial disclosures required by the conflict of interest policy were made; and that conflicts of interest, if any, were, or prior to the organization's expenditure of any funds under the award, will be, satisfactorily managed, reduced or eliminated in accordance with the organization's conflict of interest policy. Conflicts that cannot be satisfactorily managed, reduced or eliminated and research that proceeds without the imposition of conditions or restrictions when a conflict of interest exists, must be disclosed to NSF via use of the Notifications and Requests Module in FastLane.

* Is the organization or its principals presently debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from covered transactions by any Federal department or agency?

No

Yes (Explanation required)

* I have read and agree to the certifications listed above

Previous Next

Step 2: AOR certifies proposal

Submit Proposal

1. Review Proposal Information ✓

2. Proposal Certifications ✓

3. Sign & Submit

Sign & Submit

Organization Information

DUNS Number

074811803

DUNS Qualifier

4567

Authorized Organizational Representative (AOR) Information

The following information will be added to the proposal once signed and submitted:

AOR Name: Jane Smith
Phone: 202-123-4567
Fax: 202-123-4568
Primary Email: jsmith@email.com

Note:

The following AOR information will be printed on the proposal coversheet after the proposal is electronically signed by the AOR. If this information is incorrect, please modify it before signing and submitting the proposal electronically.

Changes to your information can be made in FastLane, by an authorized user at your organization, by navigating to 'Research Administration > Accounts Management'.



Step 3: AOR signs and submits proposal

Cancel

Previous

Sign and Submit

Proposal - 1234567

 The proposal has been successfully submitted. You can now access this proposal from FastLane's Submitted Documents tab. 

Proposal Title: Collaborative Research: Supporting Faculty in Quantitative Undergraduate Biology Education and Synthesis

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

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

Proposal Type: Research Advanced by Interdisciplinary Research and Engineering (RAISE)

Submission Type: Full Proposal



























Proposal Actions

[Print Entire Proposal](#)

Collaborative Status

Lead proposal

Link(s): [2222333](#)

View / Print Proposal Sections (PDF format)	Last Updated	Compliance Status
 Cover Sheet	10/13/2016	 No issues found
 Project Summary	10/13/2016	 No issues found
 Project Description	10/13/2016	 No issues found
 References Cited	10/13/2016	 No issues found
 Data Management Plan	10/13/2016	 No issues found
 Postdoctoral Mentoring Plan	10/13/2016	 No issues found
 Senior Personnel Documents Biographical Sketches Collaborators & Other Affiliations Current & Pending Support	10/13/2016	 No issues found
 Facilities, Equipment, and Other Resources	10/13/2016	 No issues found
 Collaboration Plan	10/13/2016	 No issues found
 Management Plan	10/13/2016	 No issues found
 Budgets	10/13/2016	 No issues found
 Budget Justification	10/13/2016	 No issues found
 Suggested Reviewer List	10/13/2016	 No issues found

Confirmation
of successful
proposal

Concept: View Only Access to Proposal

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

[My Desktop](#) > [Proposal Management](#) > [Proposal - 1234567 \(View only\)](#)

Proposal - 1234567 (View only)

Proposal Title: Supporting Faculty in Quantitative Undergraduate Biology Education and Synthesis
Funding Opportunity: [NSF 16-505](#) - Faculty Early Career Development Program
Where to Apply: Biological Sciences (BIO) - Environmental Biology (DEB), Thermal Transport Processes
Proposal Type: Research Advanced by Interdisciplinary Research and Engineering (RAISE)
Submission Type: Full Proposal

Proposal Actions

[Print Entire Proposal](#)

Collaborative Status
 Lead proposal
 Link(s): 3333333

View / Print Proposal Sections (PDF format)	Last Updated	Compliance Status
Cover Sheet	10/13/2016	✔ No issues found
Project Summary	10/13/2016	✔ No issues found
Project Description	10/13/2016	✔ No issues found
References Cited	10/13/2016	✔ No issues found
Data Management Plan	10/13/2016	✔ No issues found
Postdoctoral Mentoring Plan	10/13/2016	✔ No issues found
Senior Personnel Documents Biographical Sketches Collaborators & Other Affiliations Current & Pending Support	10/13/2016	✔ No issues found
Facilities, Equipment, and Other Resources	10/13/2016	✔ No issues found
Collaboration Plan	10/13/2016	✔ No issues found
Management Plan	10/13/2016	✔ No issues found
Budgets	10/13/2016	✔ No issues found
Budget Justification	10/13/2016	✔ No issues found
Suggested Reviewer List	10/13/2016	✔ No issues found

SPO or AOR would have read access to proposal sections

Concept: Post Submission Actions

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

Home > Proposal Management > Submitted Documents & Associated Actions

Submitted Documents & Associated Actions

Filter Proposals by

Proposal Number PI Name Submission Type Submit Date Range Action type Action status Filter

Show 10 Showing 1 to 10 of 48 < PREV 1 2 3 4 5 NEXT >

Proposal Number	Temporary Proposal Number	PI Name	Title	Submit Date	Actions
9999999	1234567	Demo, Terri	Proposal: CAREER: Investigating the evolution of gene regulation at Drosophila Hox genes	11/01/2015	Select one
		Associated Action(s)	Submit Date	Submitter	Action Status
		Proposal File Update	11/15/2015	Smith, Daniel	Awaiting Approval
9222222	2222222	Alphaman, Alan	Supplement: Supporting Faculty in Quantitative Undergraduate Biology Education and Synthesis (QUBES)	11/01/2015	Select one
9333333	3333333	Jones, George	Proposal: RCN-UBE - GCAT-SEEK: The Genome Consortium for Active Undergraduate Research and Teaching Using Next-Generation Sequencing	12/01/2015	Select one
		Associated Action(s)	Submit Date	Submitter	Action Status
		Proposal File Update Budget Revision	11/15/2015 11/13/2015	Anderson, Julie Jones, Thomas	Awaiting Approval Approved
9992937	7992937	Alphaman, Alan	Proposal: Collaborative Research: Supporting Faculty in Quantitative Undergraduate Biology and Synthesis (QUBES)	01/01/2014	Select one
9785906	1785906	Thomas, Jenna	Letter of Intent: RCN-UBE - GCAT-SEEK: The Genome Consortium for Active Undergraduate Research and Teaching Using Next-Generation Sequencing	01/01/2014	Select one
9305555	8305555	Alphaman, Alan	Proposal: Collaborative Research: Supporting Faculty in Quantitative Undergraduate Biology and Synthesis (QUBES)	01/01/2014	Select one
9923333	2923333	Jones, George	Supplement: RCN-UBE - GCAT-SEEK: The Genome Consortium for Active Undergraduate Research and Teaching Using Next-Generation Sequencing	03/01/2014	Select one
9112222	1112222	Alphaman, Alan	Proposal: Collaborative Research: Supporting Faculty in Quantitative Undergraduate Biology and Synthesis (QUBES)	03/01/2014	Select one
9883333	8883333	Loyal, Andrea	Supplement: RCN-UBE - GCAT-SEEK: The Genome Consortium for Active Undergraduate Research and Teaching Using Next-Generation Sequencing	03/01/2014	Select one
9222777	2222777	Thomas, Jenna	Proposal: Collaborative Research: Supporting Faculty in Quantitative Undergraduate Biology and Synthesis (QUBES)	03/01/2014	Select one

Show 10 Showing 1 to 10 of 48 < PREV 1 2 3 4 5 NEXT >

Return to Proposal Management

Quick filters to narrow down data in table below

Expands to show action details

All actions available for the proposal document

Visual status indicators for actions

Proposal Auto-Compliance Checking

History and Overview

- Reduce administrative burden levels and ensure proposal compliance with requirements outlined in the Proposal & Award Policies and Procedures Guide (PAPPG)
- ERA Forum Priority Topic

Automated Proposal Compliance Checking

- NSF continues to invest in expanding auto-compliance checking capabilities to reduce administrative burden levels on both NSF programs and the research community.
- Core PAPPG proposal section, page count, budget, and deadline requirements are checked during proposal preparation and submission activities in FastLane.
- The recent release of auto-compliance checks in January 2017 supported additional standard proposal type requirements and included checks for new types of proposals such as RAISE and GOALI.
- Plans in FY 2017 include integrating current and upcoming auto-compliance checks with Proposal Submission Modernization efforts (PSM) and systems.


Automated Proposal Compliance Checking

- Compliance checks are run when the “Check Proposal”, “Forward to SPO”, and “Submit” buttons are selected.
- A Warning or an Error may be triggered depending on the type of proposal.
- Auto-compliance checks also apply when a PFU is performed on a proposal.
- A complete listing of current FastLane checks is available at:
https://www.nsf.gov/bfa/dias/policy/autocheck/compliancechecks_jan17.pdf

Automated Proposal Compliance Checking

LEGEND

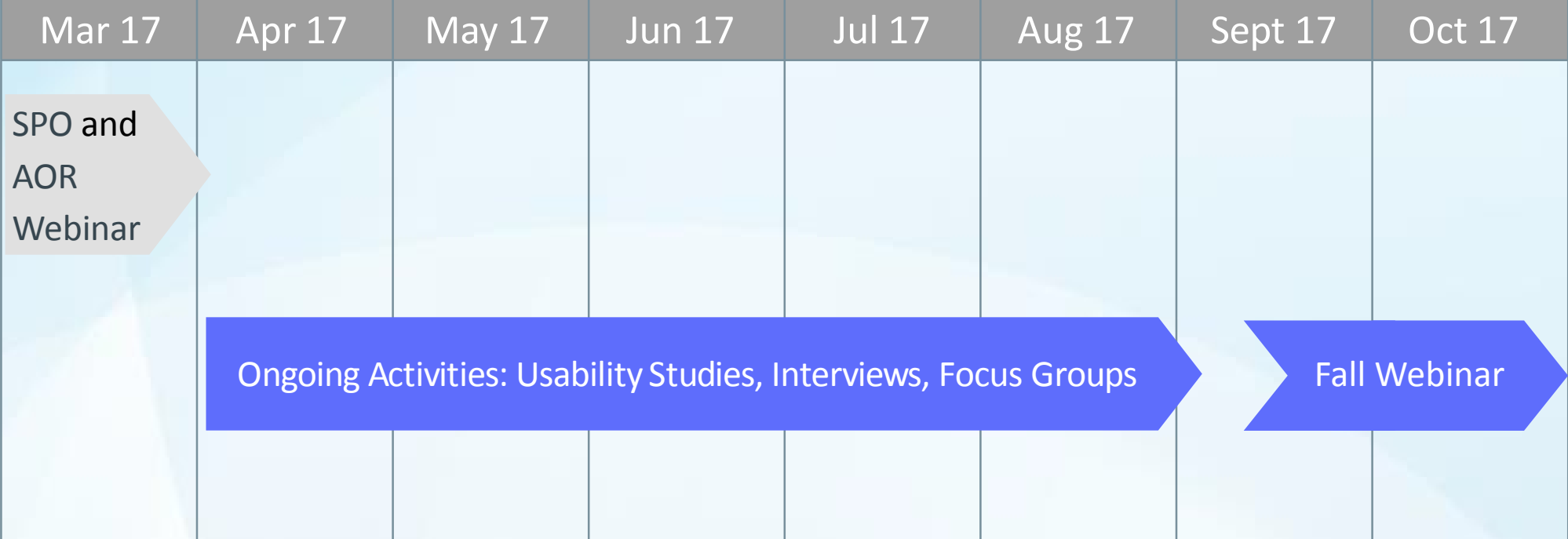
- ✓ = The system runs a compliance check and an Error or Warning message will be displayed (as noted in the "Error/Warning" column) if the proposal fails the compliance check.
- None = The system does not run a compliance check.
- N/A = The system does not run a compliance check because the proposal rule doesn't apply for this type of proposal.



AUTOMATED PROPOSAL COMPLIANCE CHECKS PERFORMED BY SYSTEM AS OF JANUARY 30TH, 2017*														
COMPLIANCE CHECK	FUNDING OPPORTUNITY TYPE	ERROR / WARNING	TYPE OF PROPOSAL											
			Research	RAPID	EAGER	RAISE	GOALI	Ideas Lab	FASED	Conference	Equipment	Travel	Center/Research Infrastructure	Fellowship
Proposal Section Exists Checks														
1. Project Summary is required.	PAPPG	Error	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	Program Description		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	Program Announcement		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
2. Project Description is required.	PAPPG	Error	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	None	None
	Program Description		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	None	None
	Program Announcement		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	None
3. References Cited is required.	PAPPG	Error	✓	✓	✓	✓	✓	✓	✓	N/A	✓	N/A	None	None
	Program Description		✓	✓	✓	✓	✓	✓	✓	N/A	✓	N/A	None	None
	Program Announcement		✓	✓	✓	✓	✓	✓	✓	N/A	✓	N/A	None	None
4. Biographical Sketch(es) is required for each Senior Personnel/PI/Co-PI.	PAPPG	Error	✓	✓	✓	✓	✓	✓	✓	N/A	✓	N/A	None	None
	Program Description		✓	✓	✓	✓	✓	✓	✓	N/A	✓	N/A	None	None
	Program Announcement		✓	✓	✓	✓	✓	✓	✓	N/A	✓	N/A	None	None
5. Primary Budget is required.	PAPPG	Error	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	None	None
	Program Description		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	None	None
	Program Announcement		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	None	None
6. Budget Justification for the Primary Organization is required.	PAPPG	Error	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	None	None
	Program Description		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	None	None
	Program Announcement		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	None	None
7. Budget Justification for each Subrecipient Organization is required.	PAPPG	Error	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	None	None
	Program Description		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	None	None
	Program Announcement		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	None	None
8. Current and Pending Support is required for each Senior Personnel/PI/Co-PI.	PAPPG	Error	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	None	None
	Program Description		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	None	None
	Program Announcement		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	None	None
9. Facilities, Equipment, Other Resources is required.	PAPPG	Error	✓	✓	✓	✓	✓	✓	✓	N/A	✓	N/A	None	None
	Program Description		✓	✓	✓	✓	✓	✓	✓	N/A	✓	N/A	None	None
	Program Announcement		✓	✓	✓	✓	✓	✓	✓	N/A	✓	N/A	None	None
	PAPPG	Warning	None	None	None	None	None	None	None	N/A	None	N/A	None	None
	Program Description		None	None	None	None	None	None	None	N/A	None	N/A	None	None
	Program Announcement		None	None	None	None	None	None	None	N/A	None	N/A	None	None

https://www.nsf.gov/bfa/dias/policy/autocheck/compliancechecks_jan17.pdf

2017 Notional Timeline (Subject to Change)



Q&A

Next Steps and ERA Forum Resources

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