

# ERA Forum Webinar Series: Q&As

This document contains questions and answers about the Account Management Modernization and Proposal Submission Modernization (PSM) topics discussed during the ERA Forum webinar. The webinar was held on September 19<sup>th</sup>, 2017. For further questions about Account Management Modernization and PSM, please send an email to [nsferaforum@nsf.gov](mailto:nsferaforum@nsf.gov). For questions regarding NSF proposal and award policies and procedures, please send an email to [policy@nsf.gov](mailto:policy@nsf.gov).

## 1. Related to Account Management Modernization:

a. Are there any plans to allow research administrators access to reset passwords for PIs again in Fastlane and Research.gov?

No. Individuals can reset their own password via a link that is sent to their email address.

b. Will organizations no longer add users directly? Will users go directly to NSF's system to create their account?

Organizations Administrators will be able to assign roles to individual users directly; however, users will be responsible for inputting their own information (email addresses, phone numbers, etc.). Administrators will be able to assign the following roles within their organization: PI ACM\$, GRFP CO/FO/Alt.CO, Administrator, AOR, SPO, View Only and OAU.

After the rollout, new users can obtain NSF IDs and create accounts via the Register link on Research.gov. Administrators can also invite individuals to register for an NSF ID from the View My Users dashboard.

c. Will users be able to change their primary email at a later date?

Yes, users will be able to change their primary email address using the My Profile link.

d. If the primary email address follows each user, then what's the purpose of the work email address?

The work email address is where NSF official communications regarding proposals and awards will be sent. The primary email address is for account recovery, such as password resets. If you want to use the same email address for both types of communications, you can.

Users need to maintain access to their primary email account regardless of where they are working.

e. Will the email search both primary and secondary emails?

The new system will search all email addresses including, primary, work, and secondary addresses.

f. Will official NSF communications be sent to all emails associated with a username/login?

No. NSF communications related to your account and password will be sent to the primary email address.

NSF communications regarding proposals and awards will be sent to an individual's work email address associated with the organization listed on the proposal and/or award. The work email can be updated and maintained through the View My Roles dashboard. When a user requests a role for an organization, the user will be required to input a Work Email and Work Phone Number. Administrators will not update or maintain users' information.

g. Regarding the policy against shared email addresses, how will you handle SPOs who need to have one email address for official organizational business?

If more than one person needs to receive email communications related to a proposal or an award, NSF suggests setting up forwarding rules. NSF may support shared email addresses for the work email address in the future. At this time, primary, secondary and work email addresses will need to remain unique.

h. What are the primary email requirements?

The primary email address should be unique to the user. The user must have access to that account in order to make changes to their account or to reset a password. Users receive a verification email before it can be linked to your NSF ID as primary.

i. Will administrators be able to add the new organization registration information prior to bringing in other accounts?

Yes, organizations can register prior to bringing in other accounts.

If an organization is new to NSF, the person requesting the first Administrator role will enter the organization registration information. If updates are needed after the organization is created, the updates will be made in Research.gov as they are in FastLane today.

j. Will users be able to have multiple roles (i.e., manage proposal and manage organization)?

Yes, administrators can assign additional roles to users through the View My Roles page, and users will be able to request a role at an organization through the Add a New Role page.

k. Since users can now self-register, who is responsible for updating their accounts when they move to another organization?

The user will be responsible for updating any contact information for roles at the new organization using the My Roles dashboard. In most cases the user's profile data, including primary email address, should remain the same. If changes are needed, the user can make updates using the My Profile link. Administrators at the user's previous organization are responsible for removing the user via the My Users dashboard.

l. Does an individual's primary email address need to remain the same when changing organizations?

There should be no need to change the primary address when a person changes organizations because an individual can establish a work email address at the new organization. However, primary email address can be updated at any time from the My Profile link. Please note that updating the primary email address will require a validation step to verify that the individual owns that email account.

m. When will accounts be linked with ORCID, instead of being separate and optional?

There are currently no plans to make ORCID required.

n. Will central offices be notified when a new user registers with an organization so that we know when to approve/disapprove the roles?

When a new user requests a role at an organization, all Administrators for the organization will receive an email, and alerts will be posted on the Administrators' View My Users dashboards in Research.gov.

o. How would we select a department administrator to assist a PI with a proposal? In FastLane, we currently do not need to give them a role.

To assist a PI with a proposal, an individual needs an OAU role. For the initial rollout there will not be a mechanism for new users to request the OAU role. Please see the answer above for more details.

p. How do we check whether we have duplicate accounts when two work emails were used for two different organizational accounts? The old work account should have already been deactivated by the previous university employer.

Users will be automatically notified upon sign in and migration to the new system. To check before the new system is online, please contact NSF IT Help Central.

Please keep in mind, users need to maintain access to their primary email accounts regardless of where they are working.

q. Will administrators be able to search for users by NSF ID?

Administrators will be able to search by email address and NSF ID. The system will search all email addresses – Primary, Secondary and Work Email Addresses.

r. Will the Research Administrator receive an email when there are pending roles to be approved?

Yes.

s. Can there be more than one POC listed for an organization in order to receive notifications?

All Administrators at the organization will receive notifications regarding role approvals.

t. If View, SPO, and Administrator roles are hierarchical, will this be displayed as a hierarchy to make it clear that we can't pick and choose?

Yes, when you select the Administrator role, the SPO and View Only roles will be auto-selected.

u. If multiple users have the Institution Administrator role, will each of them be emailed every time a user requests new roles?

Yes.

v. Will a definition of all the roles be available on the website?

Yes. After initial rollout, job aids will be available to support an understanding of user roles.

w. Right now, all AORs receive an email notification when certain actions are taken. Will there be a way to edit which notifications an AOR receives?

There are no plans to change how notifications are sent to AORs.

x. Where do department administrators fit within this new hierarchy? We're neither PIs nor SPOs. Will we still be able to access a proposal utilizing the Temporary Proposal ID (TPI) and PIN?

If you are accessing a proposal using the TPI and a PIN, you are set up as an OAU. Please see the answer to question the question above for how this role can be established in the new system. If you are already set up as an OAU, you will not need to take any action for continued access.

y. How does one register as an Other Authorized User (OAU)?

For the initial rollout, individuals will not be able to request the OAU role. For new OAUs, the Administrator will assign the OAU role from the View My Users dashboard. Administrators can only assign the OAU role if the individual has a NSF ID.

After the rollout, new users can obtain NSF IDs and create accounts via the Register link on Research.gov. Administrators can also invite individuals to register for an NSF ID from the View My Users dashboard.

Individuals with existing OAU access will not need to take action to continue their access.

z. Do OAUs need to be assigned a specific role?

Administrators will need to assign the OAU role to any new users. However, if you already have access as an OAU, you will not need to take any action to continue your access.

aa. If I need to register as a new user, which system would you recommend: FastLane, Research.gov or Grants.gov ?

After rollout, new users can obtain an NSF ID via the Register link on Research.gov in the top righthand navigation pane.

## 2. Proposal Submission Modernization (PSM):

a. Will Research Administrators be able to initiate a proposal on behalf of a PI? In FastLane, it's possible to create the proposal and submit to the SPO on behalf of the PI, who then formally submits to NSF.

Not in the initial PSM release, but NSF will look at that option for future releases.

b. When in "view-only" will SPOs lose the ability to edit proposals/upload documents?

PI/co-PIs can assign View-Only or View/Edit access to SPOs when providing access to the SPO. If assigned View/Edit access, the SPO will have ability to edit proposals and upload documents.

c. Will Authorized Organizational Representatives (AORs) be able to initiate a Proposal File Update? Currently this can only be done from a PI account in FastLane.

Not in the initial release, but NSF will look into this option for future PSM releases.

d. Will the SPO office be able to start a proposal file update on behalf of the PI?

Not in the initial release, but NSF will look into this option for future PSM releases.

e. Is the "Just-in-Time" budget process still under consideration for the PSM pilot?

"Just-in-Time" will not be part of the initial PSM release but may be included in future releases.

f. Do we have to enter the DUNS Number and qualifier, if applicable, each time at submission? Or will they be auto-populated based on the affiliated organization?

NSF is currently evaluating this concept.

g. Will PIs still be asked to choose access (view, edit, submit) when sending a proposal to the SPO?

Yes.

h. Will a demo environment be available for testing & learning the new system?

Yes. While it will not be available for the initial release, a demo environment will be available at a later date.

i. On the budget screen, will Academic, Summer, and Calendar effort be differentiated?

The months will be consolidated as calendar months based on previous usability feedback.

j. Would it be possible to upload budgets in Excel directly into the new online system, rather than entering budgeted numbers into the NSF budget template/form?

The Excel upload for budget in PSM will not be in the initial release, however, NSF will look into this option for future releases.

k. Will the SPO be able to lock sections of the proposal to prevent any changes?

This capability will not be in the initial release; however, NSF will look into this option for future releases.

l. Will the new system incorporate an updated and improved help interface?

Help tips have been integrated throughout the system. NSF is investigating improved help functionality for Research.gov.

m. When or how can we see the actual content of each major section (i.e., Biosketches, Current & Pending Support, etc.)? Are all sections still in PDF only, like in Fastlane?

Each section will be viewable. For the initial rollout, budget and cover sheet are data entry forms; Collaborators and Other Affiliates (COA) is an Excel upload (from which a PDF would be generated); and other sections are PDF uploads.

n. What is the projected timeline to rollout the new proposal system?

The new system will be rolled out in April 2018 or shortly thereafter.

o. Will all FastLane functions be migrated to Research.gov?

Yes. Over time, proposal preparation and other FastLane functions will be migrated to Research.gov.

p. In the proposal preparation module, I noticed an option to add collaborators by name. Will that eventually be an option?

Each Senior Personnel added to the proposal will need a Collaborators and Other Affiliates (COA) section added. In the future, NSF will investigate the possibility of adding COA information to the profiles of Senior Personnel.

### **3. Related to Grants.gov:**

a. What are the implications for submitting a proposal through Grants.gov? Will it be optional or mandatory?

Grants.gov is an option for NSF proposal submission. All proposals submitted to NSF, regardless of the submission method, will be reviewed by NSF. Grants.gov users must first register with NSF and must have an NSF ID, so that no duplicate accounts are produced.