

Account Management Guide



List of Account Management Job Aids

Instructions: Scroll down to each job aid in this guide or use the links below to navigate directly to the job aid.

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- 3. Navigating the Account Management Links
- 4. View and Edit My NSF Account Profile Information
- 5. Register a New Organization
- 6. Add a New Organizational Role
- 7. Add a New Organization-Approved Role Principal Investigator PI/Co-PI
- 8. Add a New Organizational Role Proposed Postdoctoral Fellow
- 9. <u>View My Organizational Roles Requested Role(s)</u>
- 10. View My Organizational Roles Active Role(s)
- 11. View My Users Administrator Dashboard
- 12. Migrate Your Existing NSF Account

Reviewer Job Aids

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- 4. Prepare and Submit Ad Hoc Reviews



Register for a New NSF Account



Account Management

Register for a New NSF Account

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

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

- Access the <u>Forgot NSF ID</u> page to search for an existing NSF account.
- If you forgot your password for an established NSF account, use <u>Forgot Password</u> to retrieve it. Note that your email address can only be associated with one NSF account (i.e., only one NSF ID per person).
- If you do have an existing NSF account and you know your password, you can edit your account profile information by selecting the "My Profile" option located on the top right of <u>Research.gov</u> homepage after signing in. See <u>View and Edit My</u> <u>NSF Account Profile Information</u> for detailed information on "My Profile" functions.
- If you do not have an existing NSF account, proceed to Step 2.

Step 2: Access the Account Registration page

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

Step 3: Create a new NSF account

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

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

- If your Primary Email Address domain suffix is "edu", an important message and checkbox will display. Check the box to confirm ongoing access to your ".edu" Primary Email Address for account management and password resets and to acknowledge that sign-in to Research.gov may not be possible if access to this ".edu" Primary Email Address is lost. (Figure 2)
- Check the box to confirm that you are at least 13 years of age. (Figure 2)
- Click "Save & Preview." (Figure 2)
- Verify that your account registration information is correct on the Preview Account Registration screen. (Figure 3)
- If you need to update your account registration information, select the "Edit" button to return to the previous screen.
- Check the box to confirm you are not a robot and click "**Submit**." (Figure 3)
- You will receive an Account Registration Confirmation on the screen. (Figure 4)
- Check the primary email account that you just used for two messages: one containing your new NSF ID and another containing your temporary password.
- Click "Sign In" on <u>Research.gov</u> and enter your new NSF ID and temporary password. (Figure 1)
- Follow the instructions to change your temporary password.
- You have successfully registered for a new NSF account!



Review your information for	accuracy:
Name Dr John L Doe Sr	
Alternate Name(s) None Provided	
Primary Email Address johndoe@testeremail.com	
Secondary Email Address john@doe.net	
ORCID iD () None Provided	
Phone Number (123) 456 - 7890 ext. 2	
I'm not a robot	reCAPTCHA Privey - Terms
Submit Edit	

Figure 3

Figure 4
Activation of the account is required to sign in. To activate your account, please go to your email to complete the registration process and obtain your temporary password.
Your NSF ID Is: + 000123456
An activation email was sent to: Johndoe@abc.com

Account Registration Confirmation

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

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Step 4: Add a new organization role

• Now that you have an NSF account, you can add organizational roles to your account profile. For detailed instructions, see <u>Add a New Organizational Role</u>.

<u>Important Note:</u> Reviewers, GRFP Applicants, GRFP Fellows, and fellowship reference letter writers will not add an organizational role. GRFP-specific Account Management training resources including guides and FAQs are available on the <u>GRFP Account Management page</u>.



Working at Multiple Organizations or Moving to Another Organization



Account Management

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

You must obtain the appropriate role to access certain features. Review the role options below and make a selection. An organization can

Add and Manage Organizations

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

Add Organizational Role

Organizational 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

Add a New Role

also be added by selecting 'Add Organizational Role

Prepare Proposals and Manage

Awards Principal Investigator (PI), co-Principal Investigator (co-PI), Proposed Postdoctoral Fellow, Other Authorized User (OAU)

Add Investigator or Authorized User Role

Manage Financials in Award Cash

Management Service (ACM\$)

Awardee Preparer, Awardee Certifier, Awardee Financial Representative

Add Financial Role

Financial role details

For NSF ID

It is NSF policy that only one NSF account is allowed per user. If you already have an NSF account, you MUST NOT register for a new NSF account even if you are working at multiple organizations, moving to another organization, or working as a Postdoctoral Fellow. Instead, you can add roles to your existing NSF account.

You do NOT need a separate NSF account for each organization you are affiliated with or a new NSF account when moving to a new organization or working as a **Postdoctoral Fellow.**

- You can have multiple organizations associated with your NSF account, and you can add new roles from different organizations to your existing NSF account.
 - To add an organization-approved role from a new organization or to add the Proposed Postdoctoral Fellow role, see Add a New Organizational Role.
- If you are associated with multiple organizations, be sure to update your designated Primary Organization on the "View My Roles" page. For more information on changing your Primary Organization, see View My Organizational Roles - Active Role(s).
- If you are leaving an organization, make sure the primary email address on your NSF account profile is set to an email address you will continue to have access to after your departure (e.g., a Gmail address). For more information on editing your NSF account profile, see View and Edit My NSF Account Profile Information.

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

- Click "Sign In" located at the top right of Research.gov page.
- Enter your credentials (e.g., NSF ID and password) and click "Sian In."
- Click "My Profile" located at the top right of the screen.
- Click "Add a New Role" from the left navigation bar and the "Add a New Role" page will display. (Figure 1)
- To request the Investigator role, click the blue "Add Investigator or Authorized User Role" button located in the "Prepare Proposals and Manage Awards" box. (Figure 1)
- Select "Principal Investigator (PI) or co-Principal Investigator (co-PI)", click "Submit" (Figure 2) and a four-step role request wizard will display. (Figure 3)

Step 1: Find Organization

- Enter the organization's System for Award Management (SAM) issued Unique Entity Identifier (UEI) and click "Search" (Figure 3). If you already have an organization-approved role at NSF, you can select the SAM UEI associated with your existing organization from the drop-down menu.
- Verify the correct organization is displayed and click "Next". (Figure 3)

Select a role type to prepare proposals. O Principal Investigator (PI) or co-Principal Investigator (co-PI) O Other Authorized User (OAU) O Proposed Postdoctoral Fellow Submit Cancel

Select Role Type

Figure 2

Figure 1

×

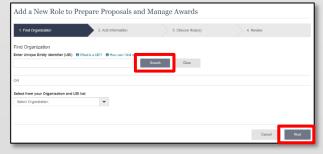


Figure 3

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



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

Step 2: Add Information

Complete the required fields denoted by a red asterisk
 (*) and click "Next." (Figure 4)

Step 3: Choose Role(s)

 The "Principal Investigator" role is pre-selected. Click "Next." (Figure 5)

Step 4: Review and Submit

 Review your information for accuracy and click "Submit." (Figure 6)

Success!

- Your role request is sent to the listed organizational contacts for review and approval. (Figure 7)
- You have successfully submitted a role request!

<u>Important Note</u>: Any demographic information provided will not be shared with the listed organizational contacts when they review and approve your role request.



Helpful Tips

- Your primary email address is used for notifications about your NSF account including password resets.
- Your work email address is associated with all your roles at a particular organization. It is used for role requests and approval notifications as well as for proposal and award related notifications.
- The Degree Information section will be pre-populated if you previously provided this information. If you update this section, the change will be reflected within the "Academic/Professional Information" tab in My Profile and on the "Edit Your Contact Information" page on "View My Roles" for all organizations where you have an organization-approved PI role.
- The Demographic Information section will be prepopulated if you have already provided this information. If you update this section, the demographic information changes will be reflected for all organizations where you have an organization-approved PI role and within the "Demographic Information" tab in My Profile.
- By default, the latest PI role will be set to primary.

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123 Test Street	* State	* Postal Code	
Atlanta	Georgia	v 12345	1
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		that those in under-represented groups have the same knowledge or more information, read the Privacy Act Statement. For more	
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Additional guidance including FAQs and instructional videos can be found on the Research.gov <u>About Account Management.</u> page. Account Management questions may be directed to the NSF IT Service Desk at 1-800-381-1532 or <u>rgov@nsf.gov</u>.



Navigating the Account Management Links



Research.gov

ONLINE GRANTS MANAGEMEN

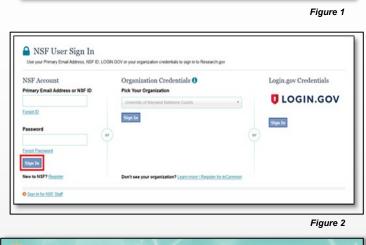
The Account Management System includes screens for Administrators to manage user and organization information and screens for users to self-manage their organizational roles and profile information. Access these screens and the functionality by signing into <u>Research.gov</u> and clicking on the "My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

Access the left navigation bar in Account Management

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

Important Note: NSF enabled <u>Login.gov</u> to sign into Research.gov in 2022. Use of Login.gov to sign into Research.gov is optional, and the research community is still able to use their NSF account or their organization-issued credentials through the InCommon integration to sign into Research.gov. Users can use any of the three options to sign into Research.gov and will be navigated to the Research.gov homepage after successful sign-in. This guide provides instructions for only the "**NSF Account**" sign in option.





Sign In Register | Home | Contact | Help | Ab

	Figure 3
Research.gov	Welcome Alan Alphaman Sign Out (Home Holy Stronger Contact Help About

Account Management Link	Functionality
My Profile / View/Edit My Profile	View and edit your profile, demographic, and academic information
Change Password	Change your Research.gov password
View My Roles	View pending and active roles, and edit organizational contact information
Add a New Role	Request a new role from an organization such as a Principal Investigator role
View My Users	You will only see this link if you have an organization-approved Administrator role for an organization registered with NSF. Approve and disapprove role requests, add and remove user roles, add and remove users from your organization, and invite users to create an NSF account so they can join your
	organization
About Account Management	Access job aids, instructional videos, and FAQs to guide you through the Account Management functionality



View and Edit My NSF Account Profile Information



Once you have an NSF account, you can view and edit your account profile information at any time via the View/Edit My Profile page. Follow the step-by-step instructions below to update your account information including contact information, demographic information, and professional information. Demographic information is only displayed for Principal Investigators (PIs), GRFP Fellows, and reviewers.

On an annual basis, all users with an NSF account will be prompted to review their account profile information to ensure their information is up-to-date.

Step 1: Access the View/Edit My Profile page

Open <u>Research.gov</u>

Account

Management

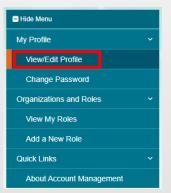
- Click "Sign In" located at the top right of the screen. (Figure 1)
- Enter your credentials (e.g., NSF ID and password) and click
 "Sign In." (Figure 2)
- Click "**My Profile**" from the top right of the screen. (Figure 3)

<u>Important Note</u>: You can also access the View/Edit My Profile page by clicking on "View/Edit Profile" located on the left navigation bar. (Figure 4)





Figure 3





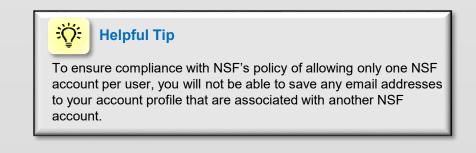
Step 2: Edit your Contact Information

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

Important Notes:

- If you change your primary email address (i.e., the email address used to create your NSF account), NSF will send you a verification email. You must verify the updated email address within four hours, or your account email address will revert back to your last verified email address.
- If your Primary Email Address domain suffix is "edu", an important message and checkbox will display. Check the box to confirm ongoing access to your ".edu" Primary Email Address for account management and password resets and to acknowledge that sign-in to Research.gov may not be possible if access to this ".edu" Primary Email Address is lost. (Figure 6)

My Profile For NSF ID	My Profile For NSF ID
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• Update your profile information here. If you have a role at an organization, you can update your organization-specific information on <u>View My Roles</u> .	Mr. v * First Name Middle Name/Initial * Last Name
Name Mr. AlanA G Alphaman Alternate Name(s Professor Proton Primary Email Address © For NSF Notifications and Password Recovery test2@associates.edu @ Pending Your Verification Secondary Email Address © Alternative Account Verification testlest@insf.gov Phone Number (888) 777-6666 ext. 3	AlanA G Alphaman Suffix Select Suffix * Alternate Name(s) (Nickname, Former Name, etc.) Professor Proton * Primary Email Address © For NSF Notifications and Password Recovery Lest2@associates edu * O I understand that I must have ongoing access to my primary email address for account management and password resets, and I may not be able to sign in to Research gov If I lose access to this address. I also understand that I can provide a work email address © Atternative Account Verification Secondary Email Address © Atternative Account Verification Lestest@paf.gov
Eat	Phone Number Extension (703) 867-5309 3
Figure 5	Save





Step 3: Edit your Demographic Information (PI/co-PIs, **GRFP Fellows and reviewers only)**

- Click "Edit" at the bottom of the Demographic Information tab in the My Profile page. (Figure 7)
- Enter your demographic information for gender, race, ethnicity and disability status and click "Save." (Figure 8)

Important Notes:

My Profile For NSF ID

- Submission of the requested demographic information is required for PI/co-PIs, GRFP Fellows, and reviewers. Until responses to all demographic questions are provided, the "Save" button will be disabled. (Figure 8)
- The "Other" option for the race question will open an optional free text field for entry. (Figure 8)
- Users wi reviewer tab with

Contact Information	Demographic Information	Academic/Professional Information
portunities in science and sure that those in under-r	technology are fairly reaching and bene epresented groups have the same know	d disability to gauge whether our programs and other fitting everyone regardless of demographic category; and to ledge of and access to programs, meetings, vacancies, and more information, read the Privacy Act Statement.
ender nspecified, or another gen	der identity	
ace /hite		
t hnicity ot Hispanic or Latino		
o you have a disability?		

Figure 7

Users who are not Pl/co-Pls, GRFP Fellows, or reviewers will not have the Demographic Information tab within "My Profile." (Figure 9)	My Profile For NSF ID	
	Contact Information Demographic Information	Academic/Professional Information
	opportunities in science and technology are fairly reaching a	race and disability to gauge whether our programs and other nd benefiting everyone regardless of demographic category; and to ne knowledge of and access to programs, meetings, vacancies, and se. For more information, read the Privacy Act Statement. * Ethnicity (Please select one)
ly Profile	Unspecified, or another gender identity Do not wish to provide Race (Please select all that apply)	Do not wish to provide * Do you have a disability? (Please select one)
Contact Information Academic/Professional Information	Race Definitions American Indian or Alaska Native Asian Black or African American Native Hawailian or Other Pacific	What is considered a disability? Yes No Do not wish to provide
Name TestFel INTTEST	Islander White Cother (Please specify)	
Alternate Name(s) None Provided	 Do not wish to provide 	
Primary Email Address I For NSF Notifications and Password Recovery testest@gmail.com		
Secondary Email Address () Alternative Account Verification None Provided	Save Cancel	
Phone Number None Provided		Figure 8
Edit		



Step 4: Edit your Academic/Professional Information

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

Important Notes:

- Highest degree and area(s) of expertise are required for PIs and reviewers and optional for all other users. (Figure 11)
- Upon selection of your highest degree, you will be prompted to provide the year completed. (Figure 11)
- If your area(s) of expertise is not listed, you may enter a free text entry using the "Other" option. (Figure 12)

Contact Information	Demographic Information	Academic/Professional Information	
information on <u>View My R</u>			
functions. For more informat Highest Degree ScD - Doctor of Science (19	tion, read the Privacy Act Statement.	o manage reviewer selection, as well as related mer	it review
	tion, read the Privacy Act Statement.	o manage reviewer selection, as well as related mer	it review
functions. For more informat Highest Degree ScD - Doctor of Science (19 Area(s) of Expertise Zoology	tion, read the Privacy Act Statement.	o manage reviewer selection, as well as related mer	it review
functions. For more informat Highest Degree ScD - Doctor of Science (19 Area(s) of Expertise Zoology Agricultural Engineering	tion, read the Privacy Act Statement.	o manage reviewer selection, as well as related mer	it review
functions. For more informat Highest Degree ScD - Doctor of Science (19 Area(s) of Expertise Zoology Agricultural Engineering ORCID ID [©]	lion, read the Privacy Act Statement.	o manage reviewer selection, as well as related mer	it review

My Profile	Area(s) of Expertise
For NSF ID	Select up to five items that best describe your area(s) of expertise. If your area of expertise is not listed, you may add your own by selecting "Other (Please specify)."
Contact Information Demographic Information Academic/Professional Information	*Area(s) of Expertise Add up to five * Other (Please specify)
O Update your profile information here. If you have a role at an organization, you can update your organization-specific	1. Other (Please specify) v Marine Biology
information on <u>View My Roles</u> .	+ Add Area of Expertise
NSF asks for professional information to enable program officials to manage reviewer selection, as well as related merit review functions. For more information, read the Privacy Act Statement.	Figure 12
* Required	
Degree	
* Highest Degree * Year Completed	
ScD - Doctor of Science v 1989	
Area(s) of Expertise	
Select up to five items that best describe your area(s) of expertise. If your area of expertise is not listed, you may add your own by selecting "Other (Please specify)." * Area(s) of Expertise Add up to five	
1. Zoology v 🝵	
2. Agricultural Engineering v	
+ Add Area of Expertise	
Professional References	
ORCID ID 💿 18-digits i.e., 1234-1234-1234	
Websites (e.g., Organizational faculty, staff profile, or professional website, LinkedIn, Google Scholar) Websites may be used for NSF selection of reviewers.	
test org	
+ Add Website	
Save Cancel	
Figure 11	



When updating my primary email, what do I do if I accidentally delete the verification email sent by NSF?

- Select the "View/Edit My Profile" option. (Refer to Step 1 in the <u>View and Edit My NSF Account Profile</u> <u>Information</u> job aid)
- Within the **Contact Information** tab on the **My Profile** page, click "**Pending Your Verification**" located to the right of the primary email address. (Figure 13)
- Select "Click here to Resend the verification link email." (Figure 14)
- A new verification email will be sent to your pending primary email address (i.e., the updated email address entered in Step 2 in the <u>View and Edit My</u> <u>NSF Account Profile Information</u> job aid).

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

If the four hours have passed, the resend verification email option will not be available and you will need to restart the process by updating your email address again. (Refer to Step 2 in the <u>View and Edit My NSF Account Profile Information</u> job aid)

Proposals	Reviews & Meetings	Awards & Reporting	Fellowships	Manage Financials	Administration
Hide Menu				1	
My Profile	× Mar Da	- Gla			
View/Edit Profile	My Pre				
Change Password	TOF INST IL				
Organizations and Roles	~ Conta	t Information Demogr	aphic Information	Academic/Professional Informatio	in
View My Roles					
Add a New Role	• You	r profile has been updated success	ifully.		
View My Users					
Quick Links			vou have a role at an organi	zation, you can update your organiz	ation-specific
About Account Manageme	informa	tion on <u>View My Roles</u> .			
	Alternate Professo Primary test2@as Seconda testtest@ Phone N	Email Address @ For NSE Notificati sociates.edu @ Pending Your Verific ry Email Address @ Alternative Acc nsf.gov	atic		
	Edit				

Figure 13

do so c	your information for your NSF account. If you need to chang testaccount@nsf.gov is pending verification. You
	have four hours from the time the change
Name	occurred to verify this email address. After four
Mr. Ala	
Alterna	verified email, will
Profes	be repopulated as your primary email.
FIOICS.	Click here to Resend the verification link email.
Primar,	
testacco	ount@nsf.gov 🚯 Pending Your Verification

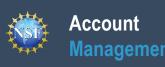


How do I change my password?

- Select the "View/Edit My Profile" option. (Refer to Step 1 in the <u>View and Edit My NSF Account</u> <u>Profile Information</u> job aid)
- Click "Change Password" located in the left navigation bar. (Figure 13)
- Update your password and click "Change Password." (Figure 15)
- Once your password is successfully changed, you will receive a password change notification on the screen. (Figure 16)
- You have successfully changed your password!
- Click "Continue to Research.gov My Desktop" to keep working. (Figure 16)

For Research.gov		
Enter your current password and then create a	new password.	
Current Password	Your password needs to:	
	Have at least 8, but no more than 20 characters	
New Password	Avoid using spaces	
	Meet 3 of the 4 rules:	
Confirm Password	At least one lowercase letter	
	At least one capital letter	
	At least one number	
	At least one of the permitted special characters # & % I @ ()	
	Note: you cannot re-use your last 6 passwords	
Change Password Cancel		

Change Password	
For Research.gov	
Success - Password Changed	
Your password has been successfully changed in Research gov and FastLane.	
In the future, if you need to change your password, click the "My Profile" link on the top right of the page and select "Change Password".	
	uro 16



Register a New Organization



Account Management

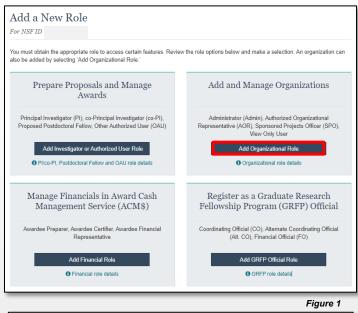
Register a New Organization

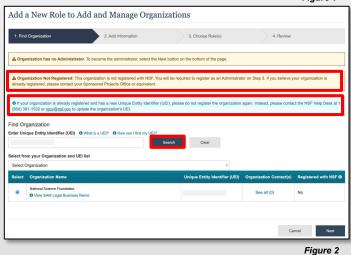
Organizations must be registered with NSF to submit proposals in Research.gov or via Grants.gov. Before a new prime awardee organization can register with NSF, it must first be registered in the System for Award Management (SAM) at <u>SAM.gov</u>, complete the required entity validation, and have a Unique Entity Identifier (UEI). Note that completion of the SAM registration process may take up to one month. Subrecipient organizations must also register with NSF after obtaining a SAM-issued UEI. However, subrecipient organizations do not need to complete the entity validation in SAM. Please check <u>SAM.gov</u> for information about any delays of SAM.gov registrations, validations and UEI issuance.

Follow the step-by-step process below to register a new organization with NSF. There is also a <u>Register a New Organization</u> with NSF video tutorial.

How do I register a new prime awardee organization with NSF?

- Open <u>Research.gov</u>
- Click "Sign In" located at the top right of the screen.
- Enter your credentials (e.g., NSF ID and password) and click "Sign In."
- Click "My Profile" located at the top right of the screen.
- Click "Add New Role" from the left navigation bar.
- Click "Add Organizational Role" located in the "Add and Manage Organizations" box. (Figure 1).
 - <u>Note</u>: If an organization is new to NSF, you must start the process by setting yourself up as the Administrator for the new organization. You must have an NSF account to start this process. The system will automatically detect that the organization is new and will walk you through setting up the organization and Administrator role.
- Enter your organization's Unique Entity Identifier (UEI) and click **"Search."**
 - If your organization is not already registered with NSF, a message will display to confirm that the organization is not found in NSF systems, and you will be able to register the organization and become the first Administrator. (Figure 2)
 - If your organization is already registered with NSF and has a new UEI, please do not register the organization again. Instead, please contact the NSF IT Service Desk at 1-800-381-1532 or rgov@nsf.gov to update the organization's UEI. (Figure 2)
 - If you need help registering in the System for Award Management (SAM), go to <u>SAM.gov</u>.
 - Note that completion of the SAM registration process may take up to one month. Please check <u>SAM.gov</u> for information about any delays of SAM.gov registrations, validations and UEI issuance.







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



(Continuation of steps to Register a prime awardee organization with NSF)

- Enter your contact information for the Administrator role, add your organization's information, and then click "Next." (Figure 3)
- Notice the "Administrator" role is pre-selected. Click "Next." (Figure 4)
- Review your organization's information for accuracy and click "Submit." (Figure 5)
- The request to register your prime awardee organization with NSF will be forwarded via email to your organization's SAM points of contact for their information only. The SAM points of contact will not need to approve the request. (Figure 6)

1. Find Organization 🗸	2. Add Information 3. Choose R	Role(s) 4. Review	
Add Information			
our Contact Details			
Work Phone Number	* Work Email O For Admin Requests		
	Select Work Email	v	
ward and Organization Contact Info	ormation • Organization Type	* Time Zone 0	
		* Time Zone () v Select Time Zone	
	* Organization Type		
Organization Short Name	* Organization Type Select Organization Type	* Select Time Zone	
Organization Short Name	* Organization Type Select Organization Type	* Select Time Zone	

1. Find Organization 🗸	2. Add Information 🗸	3. Choose Role(s)	4. Review	
ou will be registered for the follo	wing role:			
Administrator (Manage Roles)				

Add a New Role	to Add and Manage Organizat	tions	
1. Find Organization 🗸	2. Add Information 🗸	3. Choose Role(s) 🗸	4. Review
Review			
Your Contact Details			
Organization Name:	National Science Foundation		
SAM Legal Business Name:	National Science Foundation		
Role:	Administrator		
Work Email:	nsftest@nsf.gov		
Work Phone Number:	(111) 111-1111		
Award and Organization (Contact Information		
Organization Short Name:	test organization		
Organization Type:	Consortium - Non-Acad and Acad Orgs		
Time Zone:	America/Denver (GMT-7:00)		
Organization Phone Number:	(111) 111-1111		
Organization Fax Number:	(111) 111-1111		
Organization Email:	nsftest@nsf.gov		
		Canc	el Previous Submit

Figure 5



Figure 6

Helpful Tip

ک

Once an organization is registered with NSF, any updates to organizational information must be made by the organization's Administrator in SAM.gov.



How does a subrecipient organization register with NSF?

Any subrecipient named in a proposal is also required to obtain a SAM.gov-issued UEI and register the organization with NSF. Subrecipient(s) named in the proposal, however, do not need to go through the full UEI registration in SAM.gov. Refer to the <u>Proposal & Award Policies & Procedures Guide</u> (PAPPG) Chapter I.G.2. Details are as follows:

- Step 1: Subrecipient must obtain a SAM-issued UEI:
 - A subrecipient without a UEI must go to <u>SAM.gov</u> and select the green Get Started button on the "Register Your Entity or Get a Unique Entity ID" section in the upper right side of the page. Please note, the information required for obtaining a UEI is minimal (organization's legal business name and address) and will be processed relatively quickly.
- Step 2: Subrecipient must contact the NSF IT Service Desk to register a subrecipient organization with NSF:
 - Once the subrecipient obtains the UEI through SAM.gov, the subrecipient must contact the NSF IT Service Desk at 1-800-381-1532 (7:00 AM 9:00 PM ET; Monday Friday except federal holidays) to register the organization with NSF. When the subrecipient contacts the NSF IT Service Desk, inform the technician that this is a subrecipient requiring subrecipient organization registration with NSF. Please do not attempt to register the subrecipient organization with NSF in Research.gov because the system will generate an error and will not permit the subrecipient registration. To expediate the process, subrecipients should provide the following information for its subrecipient organization:
 - Subrecipient UEI: Required
 - Subrecipient Organization Name: Required
 - · Subrecipient Complete Address (Including City, State, and Zip): Required
 - Subrecipient Phone Number: Optional
 - Subrecipient POC: Optional
 - Email of Subrecipient Organization: Optional
- Once these two steps are complete, the subrecipient organization may be added to a proposal with the subrecipient UEI.



Add a New Organizational Role



Account

Management

Add a New Organizational Role

To work on NSF proposal and award activities in Research.gov or via Grants.gov, a user must have an organization-approved role at an organization registered with NSF. To request a role from your organization, you must sign into <u>Research.gov</u> and select the "**My Profile**" link located on the top right of the screen. Select the "**Add a New Role**" option from the left navigation bar. After requesting a role, your organization's Administrator will receive the request electronically to approve or disapprove it.

Add a New Role		
or NSF ID		
ou must obtain the appropriate role to access certain features. Review so be added by selecting 'Add Organizational Role.'	w the role options below and make a selection. An organization can	
Prepare Proposals and Manage Awards	Add and Manage Organizations	
Principal Investigator (PI), co-Principal Investigator (co-PI), Proposed Postdoctoral Fellow, Other Authorized User (OAU)	Administrator (Admin), Authorized Organizational Representative (AOR), Sponsored Projects Officer (SPO), View Only User	
Add Investigator or Authorized User Role	Add Organizational Role	
PI/co-PI, Postdoctoral Fellow and OAU role details	Organizational role details	
Manage Financials in Award Cash Management Service (ACM\$)	Register as a Graduate Research Fellowship Program (GRFP) Official	
Awardee Preparer, Awardee Certifier, Awardee Financial Representative	Coordinating Official (CO), Alternate Coordinating Official (Alt. CO), Financial Official (FO)	
Add Financial Role	Add GRFP Official Role	
Financial role details	GRFP role details	Figu

Figure 1 shows the four organizational role categories: Investigator, Organizational, Financial, and GRFP Official. Users should click the appropriate dark blue **Add Role** button (e.g., **Add Investigator or Authorized User Role** to request a PI role) to request the specified role and to proceed with the role wizard. Note that beneath each dark blue **Add Role** button, there is an information link (e.g., PI/co-PI, Postdoctoral Fellow and OAU role details) which provides additional information about the specific role. The table below outlines the role request options grouped by category.

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

Important Notes:

• Reviewers, GRFP Applicants, GRFP Fellows, and fellowship reference letter writers will not add an organizational role. GRFP-specific Account Management training resources including guides and FAQs are available on the <u>GRFP Account Management page</u>. Reviewers should follow the <u>Provide Reviewer Profile Information</u> aid for detailed instructions to complete their Reviewer Profile.

• Foreign Financial Disclosure Report (FFDR) Preparer role can only be assigned by Administrators and cannot be requested by users through the Account Management System. If you believe you should have this role and do not, please reach out to your organization's Administrator.



Role Request Wizard Steps

The four-step wizard process is the same for all organizational-approved roles. Proposed Postdoctoral Fellows follow a twostep wizard process as outlined in the Add a New Organizational Role - Proposed Postdoctoral Fellow job aid.

Step 1: Find Organization

- Enter your organization's Unique Entity Identifier (UEI) and click "**Search**" (Figure 2). If you already have an organization-approved role at NSF, you can use the drop-down menu to select the UEI associated with your NSF-registered organization. This step is the same whether your organization is a prime or subrecipient.
- Verify the correct organization is displayed in the results section and click "Next". (Figure 2)

Note: For more information about System for Award Management (SAM) UEIs, go to <u>SAM.gov</u>. or contact your Sponsored Projects Office (SPO).

 If your organization is not registered in SAM, go to <u>SAM.gov</u>. Note that completion of the SAM registration process may take up to one month. Please check <u>SAM.gov</u> for information about any delays of SAM.gov registrations, validations and UEI issuance.

Step 2: Add Information

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

> **Note:** If you are requesting a Principal Investigator or Proposed Postdoctoral Fellow role, you will need to enter additional data. Please see the following job aids for detailed instructions: <u>Add a New</u> <u>Organization-Approved Role – Principal Investigator</u> or <u>Add a New Organizational Role – Proposed</u> <u>Postdoctoral Fellow</u>. If you are requesting another role at an organization where you already have a role, Step 2 of the Role Request Wizard will be prepopulated with your work phone number and email.

Add a New Role to	Add and Manage Orga	nizations	
1. Find Organization	2. Add Information	3. Choose Role(s)	4. Review
(800) 381-1532 or rgov@nsf.gov to Find Organization			again. Instead, please contact the NSF Help Desk at 1
Select from your Organization and	UEI list		
Select Organization		Ψ	
			Cancel Next
			Figure 2

1. Find Organization 🗸	2. Add Inf	formation	3. Choose Role(s)	4. Review	
Existing role information: You of Please review the information for ac Add Information					
The contact information will be used for Required	r all communications whe	en performing in approved	roles for this organization		
Work Phone Number		* Work Email 0			
Work Phone Number (123) 456-7890		* Work Email 0 tester@abc.com	•		
			-		
			•		



Each NSF account requires a primary email address and a work email address.

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



Step 3: Choose Organizational Role(s)

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

Note: Depending on the selected organizational role, please be aware that some corresponding organizational roles will also be automatically added. For example, if you select the Administrator role, the Sponsored Projects Officer role and the View Only role will automatically be added to your profile.

1. Find Organization 🗸	2. Add Information 🗸	3. Choose Role(s)	4. Review	
Choose Role(s)				
Select all roles that apply. () What	are these roles?			
Administrator (Manage Roles)				
Authorized Organizational Repres	sentative - AOR (Submit Proposals)			
Sponsored Projects Officer - SPC	0 (View/Edit Proposals)			
View Only (View Reports)				

Step 4: Review and Submit

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

1. Find Organization 🗸	2. Add Information 🗸	3. Choose Role(s) 🗸		4. Review	
Review					
Organization Name:	National Science Foundation				
SAM Legal Business Na	NATIONAL SCIENCE FOUNDATION				
Role(s):	Administrator				
Work Email:	test@associates.nsf.gov				
Work Phone Number:	(123) 456-7890				
					_
			Cancel	Previous	Submit

Success!

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

Organization Contact(s)	¢ Org	ganization Contact Type	
John Doe		Administrator	
Carey, Mariah		SAM POC	
Jolie, Angelina		SAM POC	
Doe, Jane		SAM POC	

Figure 6

Helpful Tips

An email will be sent to the work email address you used to request an organizational role to inform you if your role is approved or disapproved by your organization. You should reach out to the Administrator listed as one of the organization contacts located on View My Roles page if you need to follow up on your role request.



Add a New Organization-Approved Role -Principal Investigator PI/Co-PI

NSD

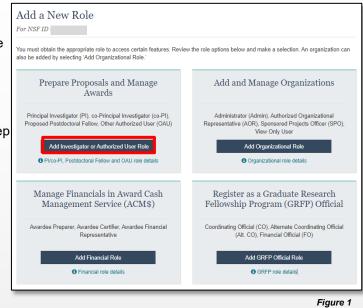
Account Management

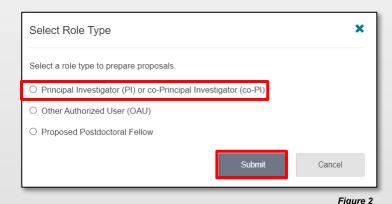
Add a New Organization-Approved Role -Principal Investigator PI/Co-PI

To work on NSF proposal and award activities in Research.gov or via Grants.gov, a Principal Investigator (PI)/co-Principal Investigator (co-PI) must have an organization-approved Investigator role. After requesting a role, your organization's Administrator will receive the request electronically to approve or disapprove it. To request an organization-approved role, you must sign into <u>Research.gov</u> and select the "**My Profile**" link located on the top right of the screen. Select the "**Add a New Role**" option from the left navigation bar.

Access the Add New a Role page

- To request an organization-approved Investigator role, click the blue "Add Investigator or Authorized User Role" button located in the "Prepare Proposals and Manage Awards" box. (Figure 1)
- Select "Principal Investigator (PI) or co-Principal Investigator (co-PI)", click "Submit" (Figure 2) and a four-step role request wizard will display. (Figure 3)



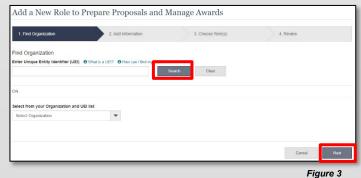


Four-Step Role Wizard

Step 1: Find Organization

- Enter the organization's Unique Entity Identifier (UEI) and click "Search" (Figure 3). If you already have an organizationapproved role at NSF, select the UEI associated with your existing organization from the drop-down menu. This step is the same whether your organization is a prime or subrecipient.
- Verify the correct organization is displayed in the results section and click "Next".

Note: For more information about SAM UEIs, go to <u>SAM.gov</u>. or contact your Sponsored Projects Office (SPO).





Account Management

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

Step 2: Add Information

 Complete the required fields denoted by a red asterisk (*) and click "Next." (Figure 4)

<u>Important Note</u>: Your demographic Information will not be shared with the listed organizational contacts while reviewing and approving your role request.

Step 3: Choose Role(s)

The "Principal Investigator" role is pre-selected. Click "**Next**." (Figure 5)

Step 4: Review and Submit

- Review your information for accuracy and click "Submit." (Figure 6)
- If you need to update your PI role request information, select the "Previous" button to return to the previous screens.

Success!

- Your role request is sent to the listed Organization Contacts for review and approval. (Figure 7)
- You have successfully submitted your organizational role request!

He Re

Helpful Tips

- Your work email address is associated with all your roles at a particular organization. It is used for role request and approval notifications as well as for proposal and award related notifications.
- The Degree Information section will be pre-populated if you previously provided this information. If you update this section, the change will be reflected within the "Academic/Professional Information" tab in My Profile and for all organizations where you have an organizational Investigator role.
- The Demographic Information section will be prepopulated if you previously provided this information. If you update this section, the change will be reflected within the "Demographic Information" tab in My Profile and for all organizations where you have an organizational Investigator role.
- By default, the latest PI role will be set to primary.

Add a New Role to Prepare I	Proposals and Manage Awards			
1. Find Organization 🖌 2.	Add Information 3. Choose Role(s)	4. Review		
Add Information The contact information will be used for all communication	ons when performing in approved roles for this organization			
Required				
Your Contact Details				
Work Phone Number	* Work Email	* Other Email	_	
(222) 222-2222	Add Other (Please Specify)	john doe@test.com		
Your Degree Information The degree information entered here will be used to pop	volate the ministeri Cover Shaet of your removable to NSF			
* Highest Degree Type	* Degree Year			
PhD - Doctor of Philosophy	v 2015 v			
Your Work Address				
Country United States	-			
Street Address	Street Address (Line 2)	Department Name		
123 Test Street				
City	* State	* Postal Code		
Atarta	Georgia v	12345		
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	repare Proposals and M			
1. Find Organization 🗸	2. Add Information 🛩	3. Choose Role(s)	4. Review	
noose Role(s) a will be registered for the following	g role: () What is this role?			
Principal Investigator/ co-Principal Inve	estigator (Pl/co-Pl)			

in	ure	-5

1. Find Organization 🗸	2. Add Information 🗸	3. Choose Role(s) 🗸	4. Revie	3W
eview				
our Contact Details				
rganization Name: United States	College			
AM Legal Business Name: UNITE	D STATES COLLEGE			
ole: Principal Investigator / co-Principa fork Email: John.doe@abc.com	al Investigator			
fork Phone Number: (123) 456-78	390			
our Degree Information				
ighest Degree Type: AS - Associate i	in Science			
egree Year: 2017				
our Work Address				
ountry: United States				
treet Address: 1234 Street Address				
treet Address (Line 2): epartment Name:				
epartment Name: ity: Alexandria				
tate: California				
ostal Code: 90036				
our Demographic Information				
ender: Male				
ace: White thnicity: Not Hispanic or Latino				
o you have a disability?: No				
			Cancel Pr	evious Submit
				Figure 6
dd a New Role to Pr	repare Proposals and	Manage Awards		
Success - your request has been for	inwarded to the organization contact(s) bek	ow. Check the status of this request on th	e <u>View My Roles</u> page.	
rganization Contact(s)		Organization Contact Type		
		Administrator		
Smith, John		Administrator		
Smith, John ohn Doe				
		SAM POC		
ohn Doe Sarey, Mariah		SAM POC SAM POC		
ohn Doe				



Add a New Organizational Role – Proposed Postdoctoral Fellow

NSD

To work on NSF proposal and award activities in Research.gov or via Grants.gov, you must have an organizational Investigator role. Registering for a Proposed Postdoctoral Fellow organizational role creates an organization in Research.gov, but you do not need to register the organization with NSF. You will become the Administrator of the newly created organization; however, other users cannot request organizational roles or affiliate themselves with the organization. You do not need to register the newly created organization with <u>SAM.gov</u> or obtain a UEI.

To request an organizational Investigator role, you must sign in to <u>Research.gov</u> and select the "**My Profile**" link located on the top right of the screen. Then select the "**Add a New Role**" option from the left navigation bar.

Access the Add a New Role page

Account

Management

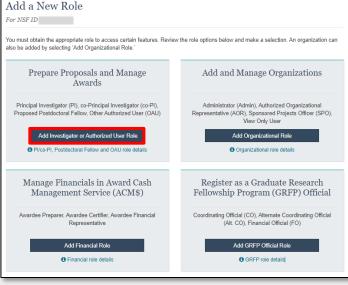
- To request an organizational Investigator role, click the blue ***Add Investigator or Authorized User Role**" button located in the "Prepare Proposals and Manage Awards." (Figure 1)
- Select "**Proposed Postdoctoral Fellow**", click "**Submit**" (Figure 2) and a two-step role request wizard will display. (Figure 3)

Two-Step Process

Step 1: Add Information

Input data into all required fields that have a red asterisk (*)

NOTE: When a Proposed Postdoctoral Fellow role is created, an institution record is created as well. The time zone selected as part of your initial Proposed Postdoctoral Fellow role request will be used by NSF for proposal submission. Changing your work address will not change your time zone. To update your time zone, please contact the NSF IT Service Desk at 1-800-381-1532 or rgov@nsf.gov.



Select Role Type

Figure 1

×

<u>:</u>

Helpful Tips

- The third option in the "Select Role Type" modal box (Figure 2) is disabled if you already have an organizational Proposed Postdoctoral Fellow role. To view your current organizational Proposed Postdoctoral Fellow role information, click on "View My Roles" and refer to the Active Roles table.
- Your work email address is associated with all your roles at a particular organization. It is used for role request and approval notifications as well as for proposal and award related notifications.
- The Degree Information section will be pre-populated if you previously provided this information. If you update this section, the change will be reflected within the "Academic/Professional Information" tab in My Profile and for all organizations where you have an organizational Investigator role.
- The Demographic Information section will be pre-populated if you previously provided this information. If you update this section, the change will be reflected within the "Demographic Information" tab in My Profile and for all organizations where you have an organizational Investigator role.

	Figure 2
Submit	Cancel
Proposed Postdoctoral Fellow	
O Other Authorized User (OAU)	
O Principal Investigator (PI) or co-Principal Investigator (co-PI)	
Select a role type to prepare proposals.	

• By default, the latest PI role will be set to primary.



Add a New Organizational Role – Proposed Postdoctoral Fellow (continued)

* Required				
Your Contact Details				
Work Phone Number	* Wo	rk Email 0		
(111) 111-1111	John	doeijjuhe.com	•	
Your Degree Information				
The degree information entered here will be used	to coculate the ori	nted Cover Sheet of your proposals to N	3.5	
Highest Degree Type		gree Year		
AS - Associate in Science	* 20	26	*	
Your Work Address				
Country	* Tim	ie Zone 0		
United States	y Pa	cific/Pago_Pago (GMT-11:00)	*	
* Street Address	Stree	t Address (Line 2)		
123 Test St	Su	ite 100		
City	* Sta	te		* Postal Code
Alexandria	Ve	mont		12345
NSF asks for demographic data relating to gende	r, ethnicity/race and	disability to gauge whether our program	s and other or	poortunities in science and technology are fairly reaching an
tenefiting everyone regardless of demographic o vacancies, and other research and educational o	ategory; and to ens	ure that those in under-represented grou yone else. For more information, read th	ps have the sa e Privacy Act 3	ame knowledge of and access to programs, meetings,
benefting everyone regardless of demographic o vacancies, and other research and educational o * Gender (Please select one)	ategory; and to ens	ure that those in under-represented grou	ps have the sa e Privacy Act 3	ame knowledge of and access to programs, meetings,
tenefiting everyone regardless of demographic c acancies, and other research and educational o Gender (Please select one)) Male	ategory; and to ens	ure that those in under-represented grou yone else. For more information, read th * Ethnicity (Please select one	ps have the sa e Privacy Act 3	ame knowledge of and access to programs, meetings,
benefiting everyone regardless of demographic c assancies, and other research and educational o 'Gender (Please select one)) Male) Pemale	ategory; and to ens	ure that those in under-represented grou yone else. For more information, read th * Ethnicity (Please select ons	ps have the sa e Privacy Act 3	ame knowledge of and access to programs, meetings,
benefiting everyone regardless of demographic c vacancies, and other research and educational o dender (Please select one) Male Permale Unspecified, or another gender identity	ategory; and to ens	ure that those in under-represented grou yone else. For more information, read th * Ethnicity (Please select one @ Hispanic or Latino O Not Hispanic or Latino	ps have the sa e Privacy Act 3	ame knowledge of and access to programs, meetings,
eventing veryone reparties of demographic o versiones, and other research and educational o Gender (Please selectione) Maie Fernale Unspooffed, or another gender identity D on or wish to provide Race (Please select all that apply)	ategory; and to ens	ver hat those in under-represented group open else. For more information, read th * Ethnicity (Please selet co Hispanic or Latino Do not wish to provide * Do you have a disability?	ps have the si e Privacy Act : i) (Please select	Galement.
exerciting wavyone regardless of demographic of accessions and other research and educational of Gender (Please select one)) Male © Demails # Unspecified, or another gender lotently] Do not wish to provide Race (Please select all that apply) Takao Definitions	ategory; and to ens	ver hat those in under-represented group yose else. For more information, read th * Ethnicity (Please selet on * Hispanic or Latino De not wish to provide * Do you have a disability? © What is considered a disability?	ps have the si e Privacy Act : i) (Please select	me knowledge of and access to programs, meetings, Gatement.
exerciting everyone regardless of demographic o scances, and offer research and educational o Gender (Please select one)) Maile) Persale © Unspecified, or another gender identity) Do not wish to provide Rake (Please select all that apply) lace Otherholms) American Indian or Alaska Native	ategory; and to ens	ure that those in under-represented group open exise. For more information, read to information, read to *Ethnicity (Please select on Net Hapanic or Latino Do not wish to provide *Do you have a disability? O (Wat is considered a disability?	ps have the si e Privacy Act : i) (Please select	me knowledge of and access to programs, meetings, Gatement.
senetting veryone regardisa of demographic c searcless and offer research and educational o Gender (Please selectione) Maie Penale Unspecified, can another gender identity Do nor wish to provide Race (Please select all that apply) Isao Definitions American Indian or Alaska Native 21 Asian	ategory; and to ens	ve that those in under-represented group open ealse. For more information, read to information, read to *Ethnicity (Please select on I Hispanic or Latino De not wish to provide *Do you have a disability? Ø What is considered a disability Yes No	ps have the si e Privacy Act : i) (Please select	me knowledge of and access to programs, meetings, Gatement.
exerciting everyone regardless of demographic of secretions, and offer research and educational of "Gender (Please select one)) Male © Demaile # Unspecified, or another gender identity) Do not wish to provide Race (Please select all that apply) Take Definitions) Amolican Indian or Alaska Native 2 Asian (Black of Abrican American)	ategory; and to ens	ure that those in under-represented group open exise. For more information, read to information, read to *Ethnicity (Please select on Net Hapanic or Latino Do not wish to provide *Do you have a disability? O (Wat is considered a disability?	ps have the si e Privacy Act : i) (Please select	me knowledge of and access to programs, meetings, Gatement.
exerciting everyone regardless of demographic of secretions and other research and educational of dender (Please selectione)) Male) Pemale © Unspecified, or another gender identity © Do not wish to provide 	ategory; and to ens	ve that those in under-represented group open ealse. For more information, read to information, read to *Ethnicity (Please select on I Hispanic or Latino De not wish to provide *Do you have a disability? Ø What is considered a disability Yes No	ps have the si e Privacy Act : i) (Please select	me knowledge of and access to programs, meetings, Gatement.
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Jeneting wayner regardiss of demographic o wateries and offer research and educational o Value Candeer (Please selectione) Male Persoale Consecting, or another gender identity Do not wish to provide Rate (Please select all that apply) Rates Definitions American Indian or Alaska Native 2 Asian Stative Havalain or Other Paolic Islander White Drates poolfy)	ategory; and to ens	ve that those in under-represented group open ealse. For more information, read to information, read to *Ethnicity (Please select on I Hispanic or Latino De not wish to provide *Do you have a disability? Ø What is considered a disability Yes No	ps have the si e Privacy Act : i) (Please select	me knowledge of and access to programs, meetings, Gatement.
	ategory; and to ens	ve that those in under-represented group open ealse. For more information, read to information, read to *Ethnicity (Please select on I Hispanic or Latino De not wish to provide *Do you have a disability? Ø What is considered a disability Yes No	ps have the si e Privacy Act : i) (Please select	me knowledge of and access to programs, meetings, Gatement.
benetifing everyone regardises of demographic o versiones and dome research and educational o Mate Pennale Formate Characteristic and the apply of the association Concerning and the apply of the association of the association Amenden Indian or Alaska Native Association Indian or Alaska Native Association Indian or Alaska Native Association Indian or Alaska Native Status Obstromer Status Havaian or Other Paolic Islander White Characteristic Association (Status)	ategory; and to ens	ve that those in under-represented group open ealse. For more information, read to information, read to *Ethnicity (Please select on I Hispanic or Latino De not wish to provide *De you have a disability? Ø What is considered a disability Yes No	ps have the si e Privacy Act : i) (Please select	me knowledge of and access to programs, meetings, Gatement.

Step 2: Review

- Review your information for accuracy and click "Submit." (Figure 4)
- If you need to update your role request information, select the "Previous" button to return to the previous screen.

Add a Proposed Postdoctoral Fellow Role

Review your information for accuracy.			
Organization Name: Doc. John Role: Proposed Postdoctoral Fellow			
Your Contact Details			
Work Phone Number: (111) 111-1111 Work Email: John.dee@abc.com			
Your Degree Information			
Highest Degree Type: AS - Associate in Science Degree Year: 2005			
Your Work Address			
Country: United States			
Time Zone: Pacific/Pago_Pago			
Street Address: 123 Test St			
Street Address (Line 2): Suite 100 City: Alexandria			
City: Alexandria State: Vermont			
Postal Code: 12345			
Your Demographic Information			
Gender: Unspecified, or another gender identity			
Race: Asian, Black or African American			
Ethnicity: Hispanic or Latino			
Do you have a disability?: Yes			
	Carrel	Dentities	
	Cancel	Previous	Submit
			Figure 4

Step 3: Confirmation

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

You have su	ccessfully added the Proposed Postdoctoral Fellow role. Please note that it can take up to 30 minutes for you to be able to prepare postdoctoral fellowship proposals.
repare and Subr	nit Proposals >
ontinue to My Pr	rofile >
dd Additional Ro	



View My Organizational Roles – Requested Role(s)



The View My Roles page shows the roles you have requested which are pending approval or disapproval from your organization's Administrator as well as your existing approved roles. You may view organization contact(s) and edit your organization contact information by following the step-by-step process below.

Individuals who are reviewers will also see reviewer/meeting participant information including reviewer organizational affiliations displayed on this page. Please see the <u>View My Reviewer/Meeting Participant Information</u> job aid for additional reviewer information.

Access the View My Roles page

Account

Management

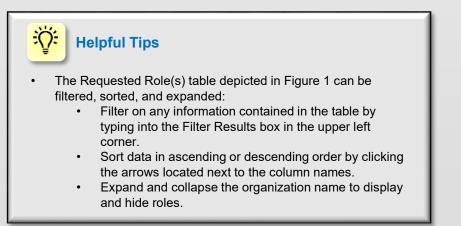
- Open <u>Research.gov</u>
- Click "Sign In" located at the top right of the screen.
- Enter your credentials (e.g., NSF ID and password) and click "Sign In."
- Click "My Profile" located at the top right of the screen.
- Click "View My Roles" from the left navigation bar.
- Your pending role requests are displayed within the "Requested Role(s)" table

How do I change organization contact information for a PI or co-PI role?

- Locate the organization and click "Edit Your Contact Info" in the "Action" column located on the right side of Requested Role(s) table. (Figure 1)
- <u>Users who have a PI or co-PI role</u> will see the screen depicted in Figure 2 and can edit their contact details, degree information, and work address. Then click "Save."
- Time zone and proposal deadlines are determined by the submitting organization's time zone and not your individual working location. Changing your work address will not change your time zone. To update your time zone, please contact the NSF IT Service Desk at 1-800-381-1532 or rgov@nsf.gov. For general guidance on proposal preparation and submission, see the NSF <u>Proposal & Award Policies & Procedures Guide</u>.

Organization Name	Work Phone	Work Email	Action
United States College View SAM Legal Business N	. (123).456-7890 ame	John_doc@abc.com	Edit Your Contact Info See Org Contact(s)
		Date Added	÷
Role(s)		- Date Added	
Role(s) Other Authorized User (OA	U)	11/17/2021	

Edit Your Contact Information		:
Your information for United States Colleg	ge.	
NSF account information is located on M	ly Profile.	
* Required		
Your Contact Details		
* Work Phone Number		* Work Email ()
(222) 222-2222		John.doe@abc.com
Your Degree Information * Highest Degree Type		* Degree Year
DrPH - Doctor of Public Health	-	1989 🔻
Your Work Address		
	•	Time Zone O How is Time Zone determined? America/New_York (GMT-5.00)
* Country	•	
* Country United States	•	America/New_York (GMT-5:00)
Country United States Street Address	¥	America/New_York (GMT-5:00)
* Country United States * Street Address 123 Test Street	Y	America/New_York (GMT-5:00)
* Country United States * Street Address 123 Test Street	* State	America/New_York (GMT-5:00)
* Country United States * Street Address 123 Test Street Department Name		America/New_York (GMT-5:00) Street Address (Line 2)
* Country United States * Street Address 123 Test Street Department Name * City	* State Virginia	America/New_York (GMT-5:00) Street Address (Line 2) * Postal Code





View My Organizational Roles - Requested Role(s) (continued)

How do I change organization contact information if I have an organizational role other than PI or co-PI?

Locate the organization and click "**Edit Your Contact Info**" in the "Action" column located on the right side of Requested Role table. (Figure 1 on previous page)

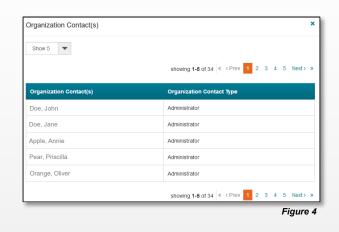
• <u>Users with organizational roles other than PI or co-PI roles will</u> see the screen depicted in Figure 3 and can edit their work phone number and work email address. Then click "**Save**."

Who do I contact at my organization for role request questions?

- Locate the organization and click "See Org Contact(s)" in the "Action" column located on the right side of Requested Role table. (Figure 1 on previous page)
- The Organization Contacts modal box will appear. (Figure 4)



Figure 3



Helpful Tips

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



View My Organizational Roles – Active Role(s)



The View My Roles page shows your existing approved roles. You may view organization contact(s) and edit your organization contact information by following the step-by-step process below. You may set your Primary Organization designation if you have a PI/co-PI role at an organization or you are a Proposed Postdoctoral Fellow.

Individuals who are reviewers will also see reviewer/meeting participant information including reviewer organizational affiliations displayed on this page. Please see the <u>View My Reviewer/Meeting Participant Information</u> job aid for additional reviewer information.

Access the View My Roles page

- Open <u>Research.gov</u>
- Click "Sign In" located at the top right of the screen.
- Enter your credentials (e.g., NSF ID and password) and click "Sign In".
- Click "My Profile" located at the top right of the screen.
- Click "View My Roles" from the left navigation bar.
- Your existing approved roles are displayed within the "Active Role(s)" table.

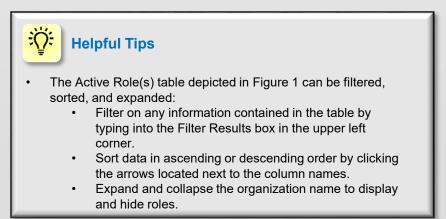
How do I change organization contact information for a PI or co-PI role?

- Locate the organization and click "**Edit**" in the "Action" column located on the right side of Active Role(s) table. (Figure 1)
- <u>Users who have a PI or co-PI role</u> will see the screen depicted in Figure 2 and can edit their contact details, degree information, and work address. Then click "**Save**."
- Time zone and proposal deadlines are determined by the submitting organization's time zone, not your individual working location. Changing your work address will not change your time zone. To update your time zone, please contact the NSF IT Service Desk at 1-800-381-1532 or <u>rgov@nsf.gov</u>. For general guidance on proposal preparation and submission, see the NSF <u>Proposal & Award Policies & Procedures Guide</u>.

Act	tive Role(s)				
	Organization Name	Work Phone	Work Email		Action
•	United States College View SAM Legal Business Name (PI Primary Organization)	(333) 333-3333	John_doc@abc.com		Edit Your Contact Info See Org Contact(s)
	Role(s)		Date Added		(
	Principal Investigator / co-Principal I	nvestigator (PI)	02/09/2023	Prin	nary Organization ()

Figure	1	
riyure		

Edit Your Contact Information		×
Your information for United States College		
NSF account information is located on My	Profile.	
* Required		
Your Contact Details		
* Work Phone Number		* Work Email 🚯
(222) 222-2222		bjonas@tlu.edu 💌
Your Degree Information * Highest Degree Type		* Degree Year
DrPH - Doctor of Public Health	-	1989
Your Work Address * Country United States	-	Time Zone • How is Time Zone determined? America/New York (GMT-5:00)
	Ť	
* Street Address		Street Address (Line 2)
123 Elm Street		
Department Name		
* City	* State	* Postal Code
Alexandria	Virginia	▼ 22307
		Save Cancel
		Eiguro





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

How do I change organization contact information for a Proposed Postdoctoral Fellow role?

- Locate the organization and click "Edit Your Contact Info" in the "Action" column located on the right side of Requested Role table. (Figure 1 on previous page)
- <u>Users who have a Proposed Postdoctoral Fellow role</u> will see the screen depicted in Figure 3 and can edit their contact details, degree information, and work address. Then click "**Save**".
- Time zone is determined by the time zone you selected during your initial role request. Changing your work address will not change your time zone. To update your time zone, please contact the NSF IT Service Desk at 1-800-381-1532 or <u>rgov@nsf.gov</u>. For general guidance on proposal preparation and submission, see the NSF <u>Proposal & Award Policies &</u> Procedures Guide.

How do I change organization contact information for all other roles?

- Locate the organization and click "Edit Your Contact Info" in the "Action" column located on the right side of Requested Role table. (Figure 1 on previous page)
- <u>Users who have roles other than PI, co-PI or Proposed</u> <u>Postdoctoral Fellow roles</u> will see the screen depicted in Figure 4 and can edit their work phone number and work email address. Then click "Save."

Who do I contact at my organization for role request questions?

- Locate the organization and click "See Org Contact(s)" in the "Action" column located on the right side of Requested Role table. (Figure 1 on previous page)
- The Organization Contacts modal box will appear. (Figure 5)

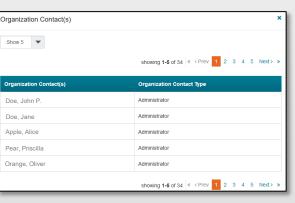
Helpful Tips

÷Q;

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

NSF account information is located	d on My Profile.		
* Required			
Your Contact Details			
* Work Phone Number		* Work Email 0	
(123) 456-7890		John.doe@abc.com	1
Your Degree Information			
* Highest Degree Type		* Degree Year	
AA - Associate in Arts	Ψ	2023	
Your Work Address			
Country		Time Zone How is Time Zone determined?	
United States	Ŧ	America/New_York (GMT-5:00)	
Street Address	Street Address (Lin	ie 2)	
123 Test Street			
	* State	* Postal Code	
* City	Virginia	· 22203	
City Arlington	Virgina		

Edit Your Contact Information			×
Your information for United States College. NSF account information is located on My Profile. * Required			
* Work Phone Number	* Work Email 🚯		
(123) 456-7890	John.doe@abc.com	•	
		Save	Cancel
			Figure 4



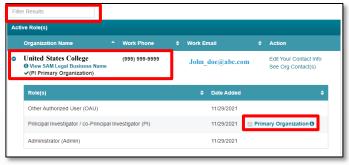


How do I set an organization as my primary organization for proposal submissions?

- <u>Prerequisite</u>: You must have either an organization-approved Principal Investigator (PI) role or a Proposed Postdoctoral Fellow role before you can designate a primary organization.
 - If you don't have an organization-approved Principal Investigator role and would like to request one, refer to the <u>Add a New Organization-Approved Role - Principal</u> <u>Investigator PI/co-PI</u> job aid.
 - If you don't have a Proposal Postdoctoral Fellow role and would like to request one, refer to the <u>Add a New</u> <u>Organizational Role – Proposed Postdoctoral Fellow</u> job aid.
- Open the "**View My Roles**" page and locate the Active Role(s) table. (Figure 6)
- Locate the organization where you have an approved PI role that you would like to set as your primary organization. (Figure 6)
- If your roles at the organization are not already expanded, click on the plus sign next to the organization name to expand the row. (Figure 6)
- Locate the Principal Investigator role. (Figure 6)
- Select the "**Primary Organization**" check box located to the right of the Date Added field. (Figure 6)
- Notice the green check mark and "PI Primary Organization" label under the organization name. (Figure 6)
- By default, the organization associated with the latest PI role added to your profile (including a Proposed Postdoctoral Fellow role) will become the primary organization.



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





View My Users – Administrator Dashboard



The View My Users page enables Administrators to view an organization's pending role requests and manage user roles. Via this dashboard, the Administrator can approve or disapprove role requests, add or remove current user roles, and add current NSF users to the organization. Reviewers are not included on the View My Users page dashboard even if they have an organizational affiliation to the organization. Only individuals with organization-approved roles are included on the View My Users page dashboard.

Access the View My Users page

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

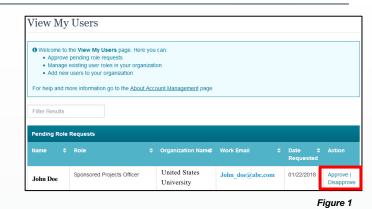
How do I approve or disapprove a role request from a user?

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

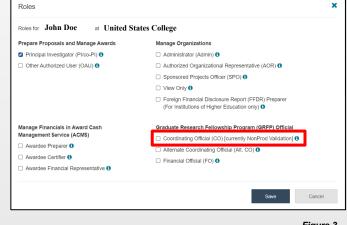
How do I add or remove user roles?

- View the "Manage User Roles" table. (Figure 2)
- Click "Manage Roles" located in the Action column on the right side of the table. (Figure 2)
- Select the appropriate role(s) to assign or remove from the user. (Figure 3)
 - *Caution:* Deselecting all roles for a user will remove the user from the organization. (Figure 3)
 - If another user has the GRFP Coordinating Official (CO) role, the system will display the current CO's name. (Figure 3)

Note: There can only be one GRFP CO at an organization, and a CO cannot be removed from the organization unless the role is reassigned to another user.







Account

Management

- As of May 20, 2024, the Foreign Financial Disclosure Report (FFDR) Preparer role is automatically selected when the Administrator assigns the AOR role to a user. Uncheck the FFDR Preparer role if the user should only have the AOR role and not the FFDR Preparer role. You can still assign the FFDR Preparer role to someone else within the organization. (Figure 4)
- If If a user has not entered the required Principal Investigator degree information, work email, and work phone number for the specified organization, an "Info Needed" icon will be displayed next to their name and PI role on the user's View My Roles page and also on the Administrator's View My Users page.(Figure 5). The user must input and save the required information by clicking on the "Edit Your Contact Info" link located in the Active Roles table on the View My Roles page.
- Click "Save." (Figure 4)

Roles	×
Representatives. The FFDR Preparer role is rea	R) Preparer role is automatically assigned to new Authorized Organizational quired to create, edit, and submit Foreign Financial Disclosure Reports for your sure Report (FFDR) Preparer if you would prefer to assign that role to someone else.
Roles for John Doe at Nationa	al Science Foundation
Prepare Proposals and Manage Awards	Manage Organizations
Principal Investigator (PI/co-PI) ()	Administrator (Admin) 8
Other Authorized User (OAU) ()	Authorized Organizational Representative (AOR) (3)
	Sponsored Projects Officer (SPO) 6
	View Only 6
	Foreign Financial Disclosure Report (FFDR) Preparer (For Institutions of Higher Education only) ¹
Manage Financials in Award Cash Management \$ervice (ACM\$)	Graduate Research Fellowship Program (GRFP) Official
Awardee Preparer ()	Coordinating Official (CO) [currently NonProd Validation] 6
Awardee Certifier 0	Alternate Coordinating Official (Alt. CO) 3
Awardee Certiller Awardee Financial Representative	Financial Official (FO) 0
	Save Cancel

Figure 4

Mar	nage User Roles						Add User
	Name	Organization Name	÷	Work Phone	÷	Work Email 💠	Action
0	John Doe	United States College				John_doe@abc .com	Manage Roles Remove User
	Role(s)					Date Ad	ded
	Principal Invest	igator / co-Principal Investigator (PI)	A Info Needed			01/18/20	18



View My Users – Administrator Dashboard (continued)

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

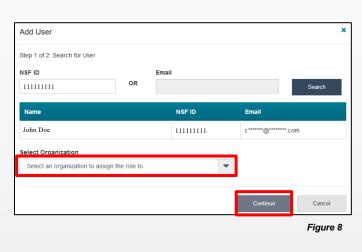
- View the "Manage User Roles" table. (Figure 6)
- Click "Add User." (Figure 6)
- Enter an NSF ID or primary, secondary, or work email address and click "Search." (Figure 7)
- Ensure the intended user's name appears.
- If you are an Administrator for multiple organizations, select an organization from the drop-down menu. (Figure 8)
- Click "Continue." (Figure 8)
- Select the appropriate role(s) to assign to the user. (Figure 9)

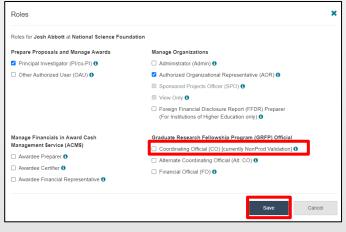
Note: If the user already has pre-selected roles, this means the user has already been added to your organization. In this case, you may edit the user's roles and click "**Add User**." (Figure 8)

- **Caution:** Deselecting all roles for a particular user will remove the user from the organization. (Figure 9)
- If another user has the GRFP Coordinating Official (CO) role, the system will display that current CO's name. (Figure 9)











Account

Management

View My Users – Administrator Dashboard (continued)

- As of May 20, 2024, the Foreign Financial Disclosure Report (FFDR) Preparer role is automatically selected when the Administrator assigns the AOR role to a user. Uncheck the FFDR Preparer role if the user should only have the AOR role and not the FFDR Preparer role. You can still assign the FFDR Preparer role to someone else within the organization. (Figure 10)
- If a user has not entered the required Principal Investigator degree information, work email, and work phone number for the specified organization, an "Info Needed" icon will be displayed next to their name and PI role on the user's View My Roles page and also on the Administrator's View My Users page. (Figure 11)

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

• Click "Add User." (Figure 10)

Representatives. The FFDR Preparer role is re	(R) Preparer role is automatically assigned to new Authorized Organizational quired to create, edit, and submit Foreign Financial Disclosure Reports for you sure Report (FFDR) Preparer if you would prefer to assign that role to someone else
Step 2 of 2: Roles for John Doe at United	States College
Prepare Proposals and Manage Awards	Manage Organizations
Principal Investigator (PI/co-PI) 3	Administrator (Admin) 8
Other Authorized User (OAU) ()	Authorized Organizational Representative (AOR) ()
	Sponsored Projects Officer (SPO) 3
	View Only 6
	Foreign Financial Disclosure Report (FFDR) Preparer (For Institutions of Higher Education only)
Manage Financials in Award Cash	Graduate Research Fellowship Program (GRFP) Official
Management \$ervice (ACM\$) □ Awardee Preparer ❶	Coordinating Official (CO) [currently NonProd Validation] 0
Awardee Preparer Awardee Certifier	Alternate Coordinating Official (Alt. CO) 6
Awardee Financial Representative ()	Financial Official (FO) 0



Figure 11



Helpful Tip

To add a user to an organization or to add roles to a user, the user must have an updated profile. A user can only update their profile if they have successfully migrated their account from FastLane and updated their primary email address and phone number. See the <u>Migrate Your Existing</u> <u>NSF Account</u> job aid for additional details.



View My Users – Administrator Dashboard (continued)

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

- Locate the "Manage User Roles" table. (Figure 12)
- Click "Invite to Update Profile" located in the Action column. (Figure 12)
- An email will be sent to the user requesting them to update their profile.

How do I invite a staff member at my organization who does not have an NSF account to register for an NSF account so that I may add them as a user on my organization's dashboard?

- Locate the "Manage User Roles" table. (Figure 12)
- Click "Add User." (Figure 12)
- Enter an email address and click "Search." (Figure 13)
- Ensure the correct email address appears. (Figure 13)
 - If you're an Administrator at multiple organizations, select an organization to invite the user. (Figure 13)
- Click "Invite to Register." (Figure 13)

How do I remove a user from my organization?

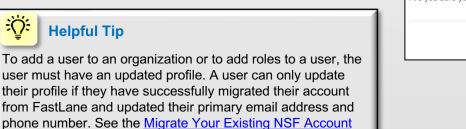
- Locate the "Manage User Roles" table. (Figures 14 and 15)
- Click "Remove User" located in the Action column. (Figure 14 shows a user who has migrated to the Account Management System and Figure 15 shows a user who has not migrated to the Account Management System)

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

- A user cannot be removed if they are the current GRFP Coordinating Official (CO). This CO role must be assigned to another user before removing the user.
- · Successfully removing the user will remove the user from the organization but not from NSF systems.
- Removing a user from the organization does not in any way impact the user's NSF account or that user's ability to become affiliated with any other organization.
- Click "Remove User." (Figure 16)

job aid for additional details.

÷Ö:



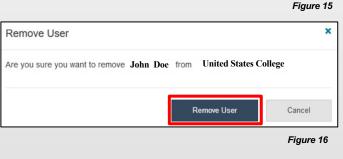
Ma	inage User R	loles					Add User
	Name	¢	Organization Name	¢	Work Phone 🗢 Work Email	÷	Action
•	John Doe		United States College	I			Invite to Update Profile
	Role(s)					Date Ad	ded
	Not Onboa	ardeo	1				

Figure 12

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



Ma	nage User Roles				Add User
	Name	Organization Name	Work Phone	Work Email	Action
0	Jane Doe	United States College	(111) 222-2222	John_doe@abc.com	Invite to Update Profile Remove User
	Role(s)			Date Added	
	Not Onboarded				





Migrate Your Existing NSF Account



Account Management

Migrate Your Existing NSF Account

To migrate your existing NSF account created in FastLane to NSF's Account Management System in Research.gov, you must verify your account's primary email address and phone number. If you created your NSF account before March 2018 and your email address is associated with more than one NSF account, you will be prompted to verify information. Depending on the information on file, you may be required to contact the NSF IT Service Desk for assistance.

How will the system prompt me to verify my information Verify Your Information so that my account can be migrated? NSE is updating its account management system and we need you to verify your account You will receive a Verify Your Information pop-up. After you have information. This is a one-time process. read it, click "Next." (Figure 1) On the next screen, you will be asked to review your account's primary email address and Select an email address, enter your 10-digit phone number and phone number click "Next." (Figure 2) If you have questions, please contact the NSF IT Help Desk at 1-800-381-1532 or rgov@nsf.gov Note the information that has been saved as your account's primary email address and phone number. (Figure 3) Next Click "Go to View My Roles" and you will be directed to the View My Roles page to view current active roles for your Figure 1 organization(s). (Figure 3) Verify Your Information Please verify your primary email address and phone number. After this one time Notes: verification process, you will be able to make future updates to this account information in My Profile Demographic information that had been entered in John Doe (NSF ID: 000100001) FastLane will migrate to Research.gov along with the rest of your account and profile information as part of the migration process. * Reauired Upon completing the verification process, you will see a green * Primary Email 🚯 success message at the top of the screen. To View/Edit your Select One account and demographic information if you have a PI role, click * Phone Number the My Profile link in the success message. (Figure 3) **Helpful Tip** ÷O: Next Figure 2 For instructions on how to make changes to your account profile information after your existing NSF account has been Verify Your Information migrated to the Account Management System in Research.gov, please refer to the View and Edit My NSF Account Profile Information job aid. Your account information has been verified and saved successfully. To update your Account and Demographic Information, visit My Profile John Doe (NSF ID: 000100001) Primary Email: John.doe@test.com Phone Number: (888) 888-8888 Please proceed to the View My Roles page to ensure you have the correct role(s). If changes are needed, you will now be able to request a new role. Go to View My Roles



Multiple Accounts Found

Procedures Guide (PAPPG).

your system access will cease.

vour reviewer information.

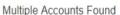
rgov@nsf.gov.

What happens when the system prompts me to verify my information but tells me I have multiple accounts that need to be reconciled?

- You will receive a Verify Your Information pop-up. After you read it, click "**Next**." (Figure 1)
- The "Multiple Accounts Found" pop-up informs you that your email address(es) is associated with more than one NSF ID. (Figure 4)
- Click "Go To Research.gov Home Page." (Figure 4)
- <u>Important Note:</u> Please be aware that the system will allow you to access Research.gov functionality for a grace period of 30 days.

My grace period has expired. What do I do?

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



 An information update to your account is required in order to restore service. Please contact IT Help Central 1-800-381-1532 or rgov@nsf.gov.

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

You may continue work on proposals and awards, however, NSF has logged this

discrepancy and will contact you to help reconcile your multiple accounts. Please be aware that these accounts must be reconciled, but there will be a grace period before

If you are a reviewer or meeting participant and have been instructed to provide your reviewer profile information, your accounts must be reconciled before you can provide

If you have questions, please contact the NSF IT Service Desk at 1 (800) 381-1532 or

Go to Research.gov Home Page

Please contact the HelpDesk.

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

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



Figure 4

Figure 5

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

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





Reviewer Job Aids



Provide Reviewer Profile Information



Account Management

Provide Reviewer Profile Information

NSF requires all reviewers and participants in panels, site visits, advisory committees, subcommittees, and committees of visitors to have an NSF account in Research.gov and complete a one-time registration process to provide their reviewer profile information. Until this is completed, *ad hoc* reviewers will be blocked from accessing proposal information and meeting participants will be blocked from accessing the Travel & Reimbursement System.

Submit Invitation Code or Email Address

- If you do not already have an NSF account in Research.gov, please refer to the <u>Register for a</u> <u>New NSF Account</u> job aid and <u>Register for a New</u> <u>NSF Account</u> video tutorial.
- After signing into Research.gov, you will see a "Reviews & Meetings" tile on the Research.gov homepage. (Figure 1)
- Click the "Provide Reviewer Profile Information" link to begin the one-time process to provide your reviewer profile information. Any information you previously provided to NSF will be pre-populated. (Figure 2) Note that after you complete the one-time process and sign back into Research.gov, the Provide Reviewer Profile Information link will no longer be displayed. (Figure 2)
- Enter the invitation code provided in an email to you from NSF (<u>noreply@nsf.gov</u>) with the subject "Review for NSF - Action Needed." If you cannot locate the email, please contact the NSF IT Service Desk at 1-800-381-1532 to have it re-sent. Alternatively, enter the email address where you received the notification from NSF for the review or meeting. (Figure 3).
- Click "Submit."
- <u>Important Note</u>: You will only receive an email with instructions to provide reviewer profile information if you are invited by an NSF staff member to review a proposal or participate in a panel, site visit, advisory committee, subcommittee, or committee of visitors meeting. If you believe you should have received an email with an invitation code or for additional assistance, contact the NSF IT Service Desk at 1-800-381-1532 or <u>rgov@nsf.gov</u>.

Verify Your Email Address

- You may be prompted to verify your email address after submitting your invitation code by entering a one-time password that will be sent to your email address. (Figure 4)
- Enter the one-time password provided in an email to you from NSF (<u>noreplyadmin@nsf.gov</u>) with the subject "NSF Email Verification - Your One-Time Password." If you cannot locate the email, click the "generate a new one" link on the screen or contact the NSF IT Service Desk at 1-800-381-1532 for assistance. (Figure 4)

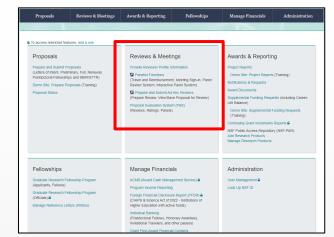


Figure 1

Reviews & Meetings

Provide Reviewer Profile Information

Panelist Functions

(Travel and Reimbursement, Meeting Sign-in, Panel Review System, Interactive Panel System)

Prepare and Submit Ad Hoc Reviews (Prepare Review, View/Save Proposal for Review)

Proposal Evaluation System (Pilot) (Reviews, Ratings, Panels)

Figure 2

Provide Reviewer Profile Information		
Torde Reviewer Frome Information		
Providing Reviewer Information is only for those users who have receiv	I notice from NSF through email to provide their inform	nation in Research.gov.
SF now requires all reviewers and meeting participants to manage profile	annation in Daaraank ann Vermuit ant be able te and	
ou may need to provide additional information such as organizational affilia		cipate unu you have completed this one-time proce
vitation Code 10 characters, e.g., 123A567B8C rovide your invitation code received via email	Email Address Provide the email address where you	received your request to review
unde your invitation code received via email	or	received your request to review
	Ť	
Submit	Subn	nit
Back to Research.gov Home		Figure 3
		. iguie e
You will need to verify your email address to contin 10 minutes. If you can't find it or it has expired, you c <u>Rgov@nsf.gov</u> .		
One-Time Password (6 digits)		
Note: For security purposes, you will receive two emails,	ne to your Research.gov account email a	and one to the email listed above.
		Continue

Click "Continue."



Account Management

Provide Reviewer Profile Information (continued)

After entering your invitation code or email address, you will be navigated to a five-step wizard to enter reviewer profile information including organizational affiliations, demographic information, academic and professional references, and preferred contact information for reviewer/meeting activities. All information can be updated at any time by accessing "My Profile" in Research.gov.

Orga

2

Add

Step 1: Organizational Affiliation(s)

- Indicate if you have been affiliated with any organizations in the past 12 months. (Figure 5)
- If you select "No", click "Next" to continue.
- If you select "Yes", you will need to add your organizational affiliations.

<u>Important Note</u>: If you already have an organization-approved role (e.g., PI role) at NSF,

then "Yes" will be automatically selected by default and the "No" option will be disabled. (Figure 8)

Adding Organization(s)

- When "Yes" is selected, a field will appear for you to add your organizational affiliation(s). (Figure 6)
- Search for your organization by typing the name of the organization in the field. If the organization is registered in SAM.gov, then it will appear in the list along with the organization's SAM.govissued Unique Entity ID (UEI) and address. Select the organization from the list. (Figure 6)
- If your organization is not in the system, you can add the organization by selecting the "Other (Please specify)" option. (Figure 7)
- If you have been affiliated with more than one organization in the past 12 months, click "Add Additional Organization" and repeat the process to add the other organizational affiliations. (Figure 7)
- If necessary, you can delete an organization you entered using the trash can icon. (Figure 7)
- Click "Next" to continue.

Important Note: If you already have an organization-approved role (e.g., PI role) at NSF, then the organization(s) affiliated with your role(s) will be listed. You cannot delete these organizations from the list. However, you can indicate if you have not been affiliated in the past 12 months with the organization(s) by clicking the check box next to it. (Figure 8)

	Provide Reviewer Pr	ofile Information	
	1. Organizational Affiliation(s)	2. Affiliation Details 3. Demog	raphic Ir
	Organizational Affiliation(s) in th * Required	e Past 12 Months	
	Organizational affiliations are used to ma	nage reviewer selection.	
	* In the past 12 months, have you been O No. I have not been affiliated with an o O Yes. I am currently affiliated or have b		nonths
		Fig	ure 5
 No. I have not been affili Yes. I am currently affilia 	ave you been affiliated with an organization? lated with an organization in the past 12 months ted or have been affiliated with an organization in t on below by name. Matching results will be returne	he past 12 months d along with the organization's SAM.gov (♂ unique entity ID) (UEI).
	ot listed, you may add your own by selecting "Other		
* Organization(s) Searc		×	
	Austin, TX 12345, US		
Other (Please spe	scify)	Figu	ure 6
anization(s) Search by N	ame		
TEST University UEI: XXXXXXXXXXXX 123 Alpha Street, Austi	n, TX 12345, US	â	
Other (Diseas energify)		United States Institute	1
Other (Please specify)	Y	ABC University	
dd Additional Organization			
		Fig	ure 7
🎬 Help	ful Tips		
Award M	anagement (SAM). Plea pletion of the SAM regis	e issued by the System for ase refer to <u>SAM.gov</u> . Note tration process may take up	,
			_
filiated with an organizati	on?		_

	. I am currently affiliated or have been affiliated with an organization rch for an organization below by name. Matching results will be retu		Ausigue entity ID (LEI). If your organization is not listed, your
	your own by selecting "Other (Please specify)."	They along with the organization's OAM.gov	
* Or	ganization(s) Search by Name		
1.	TEST University UEI: XXXXXXXXXXXXX	I have not been affiliated with this org.	anization in the past 12 months
	123 Alpha Street, Austin, TX 12345, US		
	123 Alpha Street, Austin, 1X 12345, 05		
		* Other Organization (Please specify)	

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

In the past 12 months, have you been affil

No. I have not been affiliated with an organization in the past 12 months



Provide Reviewer Profile Information (continued)

Step 2: Affiliation Details

- If your organization is registered in SAM.gov, the organization address will be pre-populated. Enter your Department/Office/Subunit. (Figure 9)
- If your organization is not registered in SAM.gov, you must enter the required address fields denoted by a red asterisk (*), along with your Department/Office/Subunit. (Figure 10)
- If you are currently affiliated or have been affiliated with more than one organization in the past 12 months, you must select a primary organization from the list. If you have an organization-approved PI role, this selection will not affect any NSF proposal preparation or submission activities in Research.gov or Grants.gov. (Figure 11)

Provide Reviewer P	rofile Informatio	on		
1. Organizational Affiliation(s) 🗸	2. Affiliation Details	3. Demographic Information	4. Additional Information	5. Review & Confirm
Affiliation Details				
Required				
Drganization(s) that are not currently se egistered in SAM.gov 2.	aved in NSF systems require mo	re information. Addresses that have be	een pre-populated cannot be edited for	or organizations that have already been
organizations can be edited later in My	Profile.			
TEST University (UEI: XXXXX	xxxxxxx)			
Address				
123 Alpha Street Austin, TX 12345, US				
* Department/Office/Subunit				
				Figure

* Country		
Select Country	v	
*Street Address	Street Address (Line 2)	
"City	* State/Territory	* Postal Code
,	Select State	

Click "Next."

Figure	10

Figure Primary Organization You indicated that you are currently affiliated or have been affiliated with more than one organization in the past 12 months. Please select your primary organization to help manage reviewer selection. This will not affect proposals. * Primary Organization Select Primary Organization

Figure 12

Step 3: Demographic Information

- Complete the required fields denoted by a red asterisk (*). (Figure 12)
- If you have previously provided your demographic information this information will be pre-populated. Review your responses and make any necessary updates.
- Click "Next."
- <u>Important Note</u>: Your demographic information will not be shared with your organizational contacts.

Provide Reviewer Profile Informatio	2 m
1. Organizational Affiliation(s) 🗸 2. Affiliation Details 🗸	3. Demographic Information 4. Additional Information 5. Review & Confirm
Demographic Information	
	sability to gauge whether our programs and other opportunities in science and technology are fairly reaching am that those in under-represented groups have the same knowledge of and access to programs, meetings, ne else. For more information, read the Privacy Act Statement.
* Required	
* Gender (Please select one)	* Ethnicity (Please select one)
O Male	 Hispanic or Latino ()
O Female	O Not Hispanic or Latino
O Unspecified, or another gender identity	O Do not wish to provide
O Do not wish to provide	
* Race (Please select all that apply)	* Do you have a disability? (Please select one)
Race Definitions	What is considered a disability?
American Indian or Alaska Native	○ Yes
Asian	O No
Black or African American	O Do not wish to provide
Native Hawaiian or Other Pacific Islander	
U White	
Other (Please specify)	
Do not wish to provide	

NSE

Account Management

Provide Reviewer Profile Information (continued)

Step 4: Additional Information

- Complete the required fields denoted by a red asterisk (*). (Figures 13 and 14)
- If you have previously provided your highest degree, areas of expertise, or professional references, this information will be prepopulated. Review your responses and make any necessary updates.

Helpful Tips

- Preferred Email Address for Review/Meeting Activities is the email address NSF will use for review activities related to panels, site visits, advisory committees, subcommittees, and committees of visitors only. Adding this preferred email address will not affect your primary, secondary, or organizational email address information in the Account Management System.
- Preferred Phone Number for Review/Meeting Activities may be used during an active panel, site visit, advisory committee, subcommittee, or committee of visitors meeting for NSF staff to contact you if you are unreachable via email. This is not for texting purposes and will not affect your other contact information in the Account Management System.
- You must provide at least one area of expertise but may not provide more than five.

Click "Next."

Provide Reviewer Profile Information	
1. Organizational Affiliation(s) 2. Affiliation Details 3. Demographic Information 4. Additional Information 5. Review & Confirm	
Additional Information	
Required	
NSF asks for professional information to enable program officials to manage reviewer selection, as well as related merit review functions. For more information, read the Privacy Act Statement.	
Contact Preferences for Review/Meeting Activities	
Preferred Email Address for Review/Meeting Activities 🚯	
○ CKPoneUAT@gmail.com	
CKPoneUATSecondary@gmail.com	
Other (Please specify)	
Preferred Phone Number for Review/Meeting Activities 🚯	
2 (111) 111-1111	
C (the related specify)	
D Do not wish to provide	Figure
Highest Degree v	
Area(s) of Expertise	
Select up to five items that best describe your area(s) of expertise. f your area of expertise is not listed, you may add your own by selecting "Other (Please specify)."	
Area(s) of Expertise Add up to five	
1. Select Area of Expertise	
Add Area of Expertise	
Professional References	
DRCID iD 🔞 16-digits i.e., 1234-1234-1234	
Websites (e.g., Organizational faculty, staff profile, or professional website, LinkedIn, Google Scholar) Websites may be used for NSF selection of reviewers.	
Add Website	



Step 5: Review & Confirm

• Review your information for accuracy and click "Submit." (Figure 15)

Provide Reviewer Profile Infor	mation
1. Organizational Affiliation(s)	Ils V 3. Demographic Information V 4. Additional Information V 5. Review & Confirm
Review & Confirm	
Organizational Affiliations	
TEST University (UEI: X0000X00000X) (Primary) ① View SAM Legal Business Name 123 Alpha Street College of Engineering Austin, TX 12345, US	United States Institute 123 Beta Street College of Law Arlington, TX 12346, US
Demographic Information	
Gender Male Race American Indian or Alaska Native	
Ethnicity Hispanic or Latino	
Do you have a disability? No	
Additional Information	
Preferred Email Address for Review/Meeting Activities CKPoneUAT@gmail.com	Preferred Phone Number for Review/Meeting Activities (111) 111-1111
Highest Degree AS - Associate in Science (2000)	
Area(s) of Expertise Atmospheric Chemistry	
ORCID iD ⁽⁵⁾ None Provided	
Websites Websites may be used for NSF selection of reviewers, testsite.com IC ²	
mysite.com 🗗	Figure 15

Submission Confirmation

 View the success message on My Profile to confirm you have successfully provided your reviewer profile information. (Figure 16)

			earch.gov account. This information will be available to ec to <u>Panelist Functions</u> or <u>Proposal Review</u> in FastLane for	
Information Demographic Information Academic/Professional Information	er activities.			
	ntact Information	Demographic Information	Academic/Professional Information	
	ntact Information	Demographic Information	Academic/Professional Information	



View and Edit My NSF Reviewer Account Profile Information



1)

View and Edit My NSF Reviewer Account Profile Information

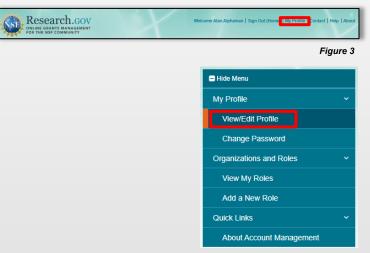
Once you have an NSF account and completed the one-time process to provide your reviewer profile information, you can view and edit your account profile information at any time via the View/Edit My Profile page. Follow the step-by-step instructions below to update your account information including contact information, demographic information, and professional information.

On an annual basis, all users with an NSF account will be prompted to review their account profile information to ensure their information is up-to-date.

Step 1: Access the View/Edit My Profile page Open Research.gov Click "Sign In" located at the top right of the screen. (Figure 🔒 NSF User Sign In NSF Account Enter your credentials (e.g., NSF ID and password) and click "Sign In." (Figure 2) Forgot K Click "My Profile" from the top right of the screen. (Figure 3)

Important Note: You can also access the View/Edit My Profile page by clicking on "View/Edit Profile" located on the left navigation bar. (Figure 4)





Step 2: Edit your Contact Information

Account

Management

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

Important Notes:

- If you change your primary email address (i.e., the email address used to create your NSF account), NSF will send you a verification email. You must verify the updated email address within four hours, or your account email address will revert back to your last verified email address.
- If your Primary Email Address domain suffix is "edu", an important message and checkbox will display. Check the box to confirm ongoing access to your ".edu" Primary Email Address for account management and password resets and to acknowledge that sign-in to Research.gov may not be possible if access to this ".edu" Primary Email Address is lost. (Figure 6)

Mr. Drofile	My Profile For NSF ID		
My Profile For NSF ID	Contact Information Dem	ographic Information Academic/	Professional Information
Contact Information Demographic Information Academic/Professional Information	• Update your profile information here. information on <u>View My Roles</u> .	If you have a role at an organization, you ca	an update your organization-specific
O Update your profile information here. If you have a role at an organization, you can update your organization-specific information on <u>View My Roles</u> .	* Required		
Name	Prefix		
Jane Doe	Select Prefix +		
Alternate Name(s) None Provided	* First Name	Middle Name/Initial	* Last Name
Primary Email Address	Jane		Doe
Jane DoeUAT@gmail.com Secondary Email Address @ Alternative Account Verification	Suffix		
None Provided	Select Suffix *		
Preferred Email Address for Review/Meeting Activities () Jane.DoeUAT@gmail.com	Alternate Name(s) (Nickname, Former Na	me. etc.)	
Phone Number			
(222) 222-2222			
Preferred Phone Number for Review/Meeting Activities () (222) 222-2222	* Primary Email Address () For NSF Not	fications and Password Recovery	
	Jane.DoeUAT@usauniversity.edu		
Edt Figure 5			
	Jane.DoeUAT@gmail.com		
	Phone Number	Extension	
	Phone Number (222) 222-2222	Extension	
	Preferred Phone Number for Review/M	eeting Activities () Extension	
	(222) 222-2222		
	Save Cancel		
			Figure 6
Helpful Tip			
To ensure compliance with NS			
NSF account per user, you wil	I not be able to save	any email	
addresses to your account pro	ofile that are associat	ed with	

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

another NSF account.



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

Step 3: Edit your Demographic Information

- Click "Edit" at the bottom of the Demographic Information tab on the My Profile page. (Figure 7)
- Enter your demographic information for gender, race, ethnicity and disability status and click "Save." (Figure 8)

Important Notes:

- Submission of the requested demographic information is required for reviewers, GRFP Fellows, and individuals with an organization-approved PI role. Until responses to all demographic questions are provided, the "Save" button will be disabled. (Figure 8)
- The "Other" option for the race question will open an optional free text field for entry. (Figure 8)

Contact Information	Demographic Information	Academic/Professional Information
pportunities in science and insure that those in under-re ther research and education Gender	technology are fairly reaching and bene epresented groups have the same know nal opportunities as everyone else. For	d disability to gauge whether our programs and other fitting everyone regardless of demographic category; and to ledge of and access to programs, meetings, vacancies, and more information, read the Privacy Act Statement.
Inspecified, or another geno Race	der identity	
kace Vhite		
thnicity lot Hispanic or Latino		
Do you have a disability? Io		
o you have a disability?		

Contact Information	Demographic Information	Academic/Professional Information	
pportunities in science and te nsure that those in under-rep	chnology are fairly reaching and bene resented groups have the same know	d disability to gauge whether our programs and other fitting everyone regardless of demographic category; kedge of and access to programs, meetings, vacancie more information, read the Privacy Act Statement.	
Required			
Gender (Please select one)		* Ethnicity (Please select one)	
Male		O Hispanic or Latino (1)	
Female		Not Hispanic or Latino	
Unspecified, or another ger	nder identity	 Do not wish to provide 	
Do not wish to provide			
Race (Please select all that a	ipply)	* Do you have a disability? (Please select one)	
Race Definitions		What is considered a disability?	
American Indian or Alaska	Native	○ Yes	
Asian		No	
Black or African American		 Do not wish to provide 	
Native Hawaiian or Other P	acific		
Islander			
White			
Other (Please specify)			
Do not wish to provide			



Account

Management

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

My Profile

Step 4: Edit your Academic/Professional Information

- Click "Edit" at the bottom of the Professional Information tab on the My Profile page. (Figure 9)
- Reviewers can add a new organizational affiliation by clicking on the "Add New Organization" button and searching for the organization by name or use the "Other" option to enter an organization manually. (Figure 10)
- Organizational affiliations cannot be deleted by reviewers, but reviewers can indicate that they are no longer affiliated with an organization. (Figure 11)
- You may select a different primary organizational affiliation by selecting one from the drop-down. (Figure 12)
- Enter your updated academic and professional information, including highest degree, area(s) of expertise, ORCID iD and websites, and click "Save." (Figure 13)

Important Notes:

ABC 123

* Country United States *Street Address

*City

100 Test Street

Alexandria

Primary Organization

Primary Organization Test University - XXXXXXXXXXXXXX

Select Primary Organization Test University - XXXXXXXXXXXXXXX

Q |

ABC 123

* Department/Office/Subunit

- Highest degree and area(s) of expertise are required for PIs and reviewers and optional for all other users. (Figure 13)
- Upon selection of your highest degree, you will be prompted to provide the year completed. (Figure 13)
- If your area(s) of expertise is not listed, you may enter a free text entry using the "Other" option. (Figure 13)

Street Address (Line 2)

Suite B

Alabama

State/Territory

Enter your organization or department's address. It will be used to help identify you
I have not been affiliated with this organization in the past 12 months

Please select your primary organization to help manage reviewer selection. This will

o fessional bage. (Figure 9)			
	Contact Information	Demographic Information Acade	nic/Professional Information
onal affiliation by on" button and me or use the "Other" µally. (Figure 10)	information on <u>View My Roles</u> .		rou can update your organization-specific
deleted by reviewers, are no longer affiliated	TEST University (UEI: XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	ABC 123 100 Test Street Suite B Department of Law Alexandria, AL 12345, US	United States Institute (UE: X000000000000) € Vive SAL (age Business Stame 500 Alpha Street Office of Law Studies Alexandria, AL 12345, US No longer officiated
rganizational Irop-down. (Figure 12)	Highest Degree BA - Bachelor of Arts (2000) Area(s) of Expertise Biochemistry - Chemistry		
rofessional e, area(s) of expertise, Save ." (Figure 13)	Computer Networks Other - Climate Systems Other - Law Organizations ORCID ID 0000-0001-5109-3700 Websites Websites may be used for NSF select mywebsite com C	tion of reviewers.	
pertise are required al for all other users.	Edit		
egree, you will be mpleted. (Figure 13) [Organizational Affiliations		Figure 9
'Other" option.		at have already been registered in Sam.go	nation. Addresses that have been pre-populated w Ø. Organizational affiliations cannot be deleted, but Add New Organization
			Figure 10
case of a duplicate name.	Degree * Highest Degree BA - Bachelor of Arts	* Year Completed	
	Area(s) of Expertise Select up to five items that best of If your area of expertise is not liste	describe your area(s) of expertise. ed, you may add your own by selecting "Othe	r (Please specify)."
* Postal Code * 12345	* Area(s) of Expertise Add up to 1. Biochemistry - Chemistry	five * Other (Please spec	ify)
	2. Other (Please specify)	* Climate Systems	8
	+ Add Area of Expertise Professional References		
Figure 11	Professional References		
Figure 11	ORCID ID 0 18-digits i.e. 1234-12	34-1234-1234	
	ORCID iD ⁽⁾ 18-digits i.e., 1234-12 0000-0001-5109-3700	34-1234-1234	
Figure 11	0000-0001-5109-3700	ilty, staff profile, or professional website, Linkedi	, Google Scholar)
	0000-0001-5109-3700 Websites (e.g., Organizational facu	ilty, staff profile, or professional website, Linkedi	i, Google Scholar)
	0000-0001-5109-3700 Websites (e.g., Organizational facu Websites may be used for NSF select	ilty, staff profile, or professional website, Linkedi	i, Google Scholar)

Cancel

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



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

When updating my primary email, what do I do if I accidentally delete the verification email sent by NSF?

- Select the "View/Edit My Profile" option. (Refer to Step 1 in the <u>View and Edit My NSF Reviewer</u> <u>Account Profile Information</u> job aid)
- Within the **Contact Information** tab on the **My Profile** page, click "**Pending Your Verification**" located to the right of the primary email address. (Figure 14)
- Select "Click here to Resend the verification link email." (Figure 15)
- A new verification email will be sent to your pending primary email address (i.e., the updated email address entered in Step 2 in the <u>View and Edit My</u> <u>NSF Reviewer Account Profile Information</u> job aid).

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

If the four hours have passed, the resend verification email option will not be available and you will need to restart the process by updating your email address again. (Refer to Step 2 in the <u>View and Edit My NSF Reviewer Account Profile</u> <u>Information</u> job aid)

My Profile Y	Max Dave Cla		
View/Edit Profile	My Profile		
Change Password	FOT INSF ID		
ganizations and Roles	Contact Information	Demographic Information	Academic/Professional Information
View My Roles	oonaat monaatin		
Add a New Role	Update your profile inform	mation here. If you have a role at an or	ganization, you can update your organization-specific
Quick Links Y	information on View My Rol		
About Account Management	Name		
	Jane Doe Alternate Name(s)		
	None Provided		
	Primary Email Address O F Jane.DoeUAT@gmail.co	or NSF Notifications and Password Recor Pending Your Verification	very
	Secondary Email Address	Alternative Account Verification	
	Preferred Email Address for Jane.DoeUAT@gmail.com	Review/Meeting Activities ()	
	Phone Number (222) 222-2222		
	Preferred Phone Number fo (222) 222-2222	r Review/Meeting Activities 0	
	Edit		

Figure 14

This is y	your information for your NSF account. If you need to chang
do so c	testaccount@nsf.gov is pending verification. You 🗙
	have four hours from the time the change
Name	occurred to verify this email address. After four
Mr. Ala	hours, the verification link will expire and the last
Altern	verified email, will
Profes	be repopulated as your primary email.
FIOICS	Click here to Resend the verification link email.
Primar,	
testacco	ount@nsf.gov () Pending Your Verification



View and Edit My NSF Reviewer Account Profile **Information (continued)**

How do I change my password?

- Select the "View/Edit My Profile" option. • (Refer to Step 1 in the View and Edit My NSF Reviewer Account Profile Information job aid)
- Click "Change Password" located in the left • navigation bar. (Figure 14 on previous page)
- Update your password and click "Change ٠ Password." (Figure 16)
- Once your password is successfully changed, • you will receive a password change notification on the screen. (Figure 17)
- You have successfully changed your • password!
- Click "Continue to Research.gov My • Desktop" to keep working. (Figure 17)

Change Password		
For Research.gov		
Enter your current password and then create a	new password.	
Current Password	Your password needs to:	
	O Have at least 8, but no more than 20 characters	
New Password	Avoid using spaces	
	O Meet 3 of the 4 rules:	
Confirm Password	At least one lowercase letter	
	At least one capital letter	
	At least one number	
	At least one of the permitted special characters # & % ! @ ()	
	Note: you cannot re-use your last 6 passwords	
Change Password Cancel		
onange rassinora ouncer		

Figure	16
--------	----

Change Password	
For Research.gov	
Success - Password Changed	
Your password has been successfully changed in Research gov and FastLane.	
In the future, if you need to change your password, click the "My Profile" link on the top right of the page and select "Change Password".	
Continue to Research gov My Desktop	
	Fiaure 17



View My Reviewer/Meeting Participant Information



Account Management

View My Reviewer/Meeting Participant Information

The View My Roles page shows the organizational roles you have requested which are pending approval or disapproval from your organization's Administrator as well as your existing approved roles. Individuals who are reviewers will also see reviewer/meeting participant information including reviewer organizational affiliations displayed on this page. You may view and edit your organizational affiliations, preferred phone number, and email for review activities by following the step-by-step process below.

Access the View My Roles page

- Open Research.gov
- Click "Sign In" located at the top right of the screen.
- Enter your credentials (e.g., NSF ID and password) and click "Sign In."
- Click "My Profile" located at the top right of the screen.
- Click "View My Roles" from the left navigation bar.
- The "View My Roles" page displays the following information:
 - Reviewer/Meeting Participant Information: Displays all 0 your organizational affiliation(s) that are active or have been active in the past 12 months if you are a reviewer. If you are **not** a reviewer, this section will not be displayed. (Figure 1)
 - Requested Role(s): Displays all organizational roles that 0 you have requested that are pending approval from your organization's Administrator. (Figure 1)
 - Active Role(s): Displays all your approved organizational 0 roles. (Figure 1)

How do I change organization contact information if I am a reviewer?

- Click "Edit in My Profile" in the Action column located on the right side of the Reviewer/Meeting Participant Information table. (Figure 1)
- You will be navigated to the "Contact Information" tab on My Profile where you can edit your preferred email address or phone number for review/meeting activities. You can update your organizational affiliation(s) on the

"Academic/Professional Information" tab on My Profile. Please see the View and Edit My NSF Reviewer Account Profile Information job aid for detailed instructions on accessing and updating My Profile.

How do I change organization contact information if I am a PI, co-PI, or Proposed Postdoctoral Fellow or I have another organizational-approved role?

- Please see the following job aids for detailed instructions on viewing requested and active organizational roles and making updates:
 - View My Organizational Roles Requested Roles
 - View My Organization Roles Active Roles

n a	you are a reviewer or meeting participar ctive role from an organization you are r doctoral Fellow role, contact the NSF H	no longer af	filiated with	, conta	act the orga	nization's adm			
		_			191180				
	viewer/Meeting Participant Informatio	_	Phone N	umbe	r for	Email for Rev	iow Activ	vition	Actions
		uviues U	Review A			Linali for Rev	icw Acu	nues	Actions
(UE	: University I: XXXXXXXXXXX) (Primary) Iew SAM Legal Business Name		(123) 123	3-4568		Jane.DoeTEST(@test.com		Edit in My Profi
ABO	C 123								
(UE	ted States Institute I: XXXXXXXXXXXX) fiew SAM Legal Business Name								
Filt	er Results								
Rec	quested Role(s)								
	Organization Name 🗘	Work Ph	ione		Work Ema	ail		Action	
		There	are currenti	y no R	Requested F	toles.			
_	er Results								
Act	ive Role(s)								
	Organization Name	Work P	hone	¢	Work Em	ail	¢	Action	
•	Test University • View SAM Legal Business Name • (PI Primary Organization)	(123) 23	3-5234		Jane.DoeT	EST@test.com			Contact Info Contact(s)
	Role(s)		_	_	¢	Date Added			¢
			(PI)			02/28/2023		ary Orgai	



Prepare and Submit Ad Hoc Reviews



Account Management

Prepare and Submit Ad Hoc Reviews

Once you have an NSF account and completed the one-time process to provide your reviewer profile information, you can access proposals assigned for your review via the Prepare and Submit *Ad Hoc* Reviews page. Follow the step-by-step instructions below to access the proposals assigned for your review.

Access the Prepare and Submit Ad Hoc Reviews Page

- Open <u>Research.gov</u>
- Click "Sign In" located at the top right of the screen. (Figure 1)
- Enter your credentials (e.g., NSF ID and password) and click
 "Sign In." (Figure 2)
- Click the "**Prepare and Submit Ad Hoc Reviews**" link on the "Reviews & Meetings" tile to view a list of the proposals that you have been assigned for review. (Figure 3)

<u>Important Note</u>: You can also access the Prepare and Submit Ad Hoc Reviews page by clicking on "Prepare and Submit Ad Hoc Reviews" link located on the left navigation bar. (Figure 4)



Figure 2



 Click the "Proposal Number" link for access to the proposal you want to review. (Figure 5)

Important Note: The table only includes assigned ad hoc reviews from the past six months that have not yet been submitted. Prepare and Submit Ad Hoc Reviews

Assigned Ad Hoc reviews from the past six months that have not yet been submitted are listed below. If you're looking for Panel Reviews or other meeting types, they can be found at Panelist Functions or the Proposal Evaluation System (Pilot). For questions regarding an assigned review, contact the Managing Program Officer (PO) listed.

Show 10 v entries Search:					
Proposal 🛔 Number	Proposal Title	Principal Investigator (PI)	PI Organization 🝦	Managing Program Officer (PO)	Review Requested Date
2344732 🗗	TEST PROPOSAL: Public Access Post- Release Testing and Troubleshooting	Alphaman, Alan	National Science Foundation	Peggy Duong pduong@nsf.gov	

Figure 5

Important Note: Ad hoc reviews assigned to you will not be displayed in the list until you complete the onetime process to provide your reviewer profile information. Click the "Provide Reviewer Profile Information" link on the page to begin the quick and easy one-time process. (Figure 6)

