This guide demonstrates how to swap Principal Investigators (PIs) and co-PIs **from the same organization** on an in-progress proposal in Research.gov. This action can only be completed by users who can edit the proposal including the PI, co-PI, Other Authorized User (OAU), and Authorized Organizational Representative (AOR) if the AOR has been provided edit access by the PI/co-PI.
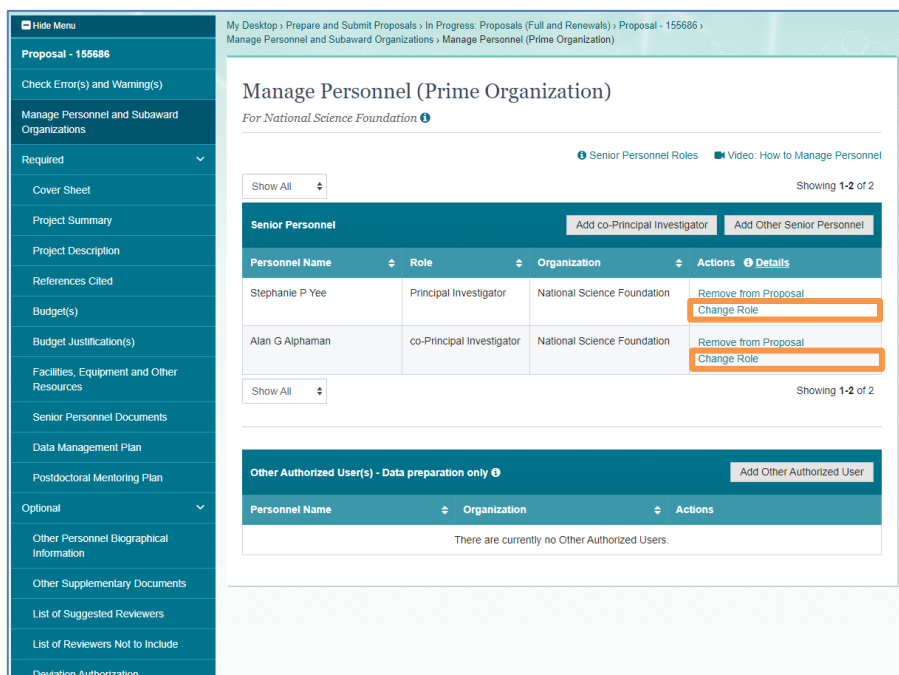
1 **Select Manage Personnel and Subaward Organizations from the left navigation bar on the proposal main page.**

- A Manage Personnel and Subaward Organizations button is also available under Proposal Actions on the proposal main page.
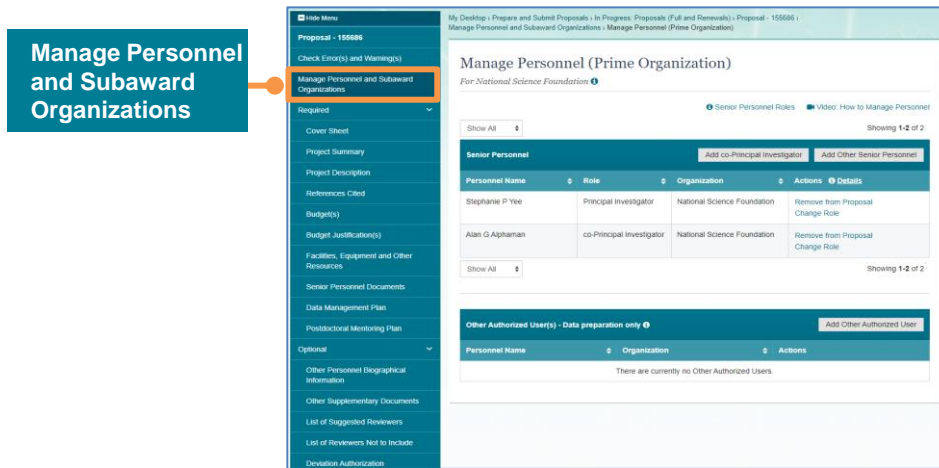
2 **Click the Change Role link for the PI or co-PI to be swapped.**

- Only PIs and co-PIs from the same organization will have the Change Role link in the Actions column of the Senior Personnel table and are the only selectable options for PI/co-PI swaps.
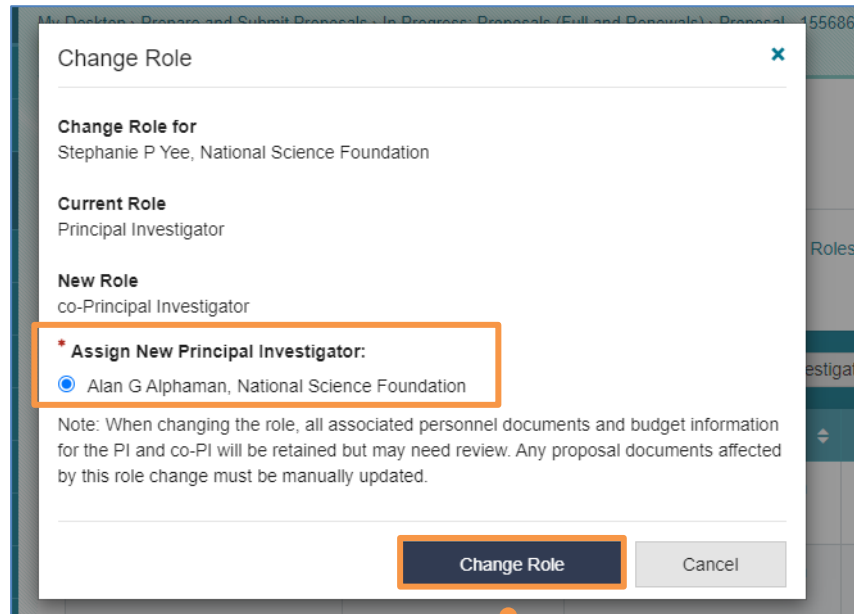

In our example, Alan is the only co-PI, so he is the only selectable option for a PI/co-PI swap on this in-progress proposal.

3 **Confirm the PI/co-PI swap and click the Change Role button on the Change Role screen.**

- The Change Role screen opens after the user clicks Change Role (screenshot in Step #2).

Change Role button

- Once the user confirms the PI/co-PI swap by clicking the Change Role button, they will see a screen like the one below.
- All associated personnel documents and budget information for the PI and co-PI is retained but may need review. Any proposal documents affected by this role change must be manually updated.

In our example, Alan is now listed as the PI and Stephanie is now listed as the co-PI on the in-progress proposal.
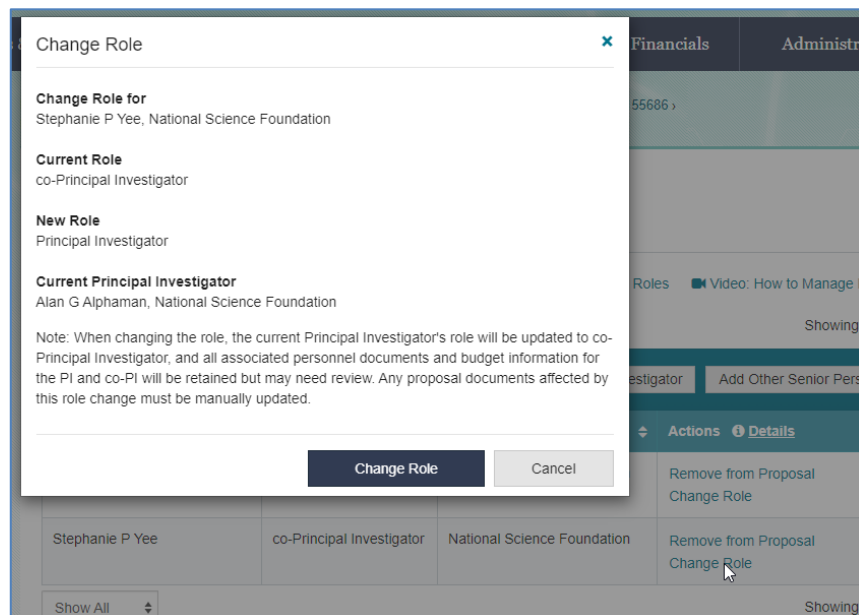
4 **View the success message and updated Senior Personnel table.**

• A system-generated email notification is sent to the PI, co-PI(s), and OAU(s) associated with the proposal.

Success message

Change Role Disablement

• If the Change Role option is not clickable, it means that the option is disabled for the specified individual.

ℹ Change Role Disablement

- If the Change Role option is not clickable and users see a red X, it means that the PI role cannot be changed because there are no other co-PIs from the same organization.

- The tool tip reminds that to swap the PI and co-PI, they must be from the same organization.

Helpful Resources

- **Help within the Proposal System**
  Inline help features such as tooltips and links to relevant *Proposal & Award Policies & Procedures Guide* sections are included throughout the Research.gov Proposal Submission System.

- **NSF System-Related Proposal Preparation FAQs**
  System-related FAQs organized by topic are available on the Research.gov About Proposal Preparation and Submission page left navigation bar.

- **Research.gov About Proposal Preparation and Submission Page**
  Bookmark https://www.research.gov/research-web/content/aboutpsm to quickly access system-related Frequently Asked Questions (FAQs), video tutorials, and how-to guides.

- **Research.gov Proposal Preparation Demo Site**
 All demo site users are automatically given the PI role for demo site purposes, in order to perform the proposal preparation functions that a PI can do in the actual system. See the demo site FAQs on the Research.gov About Proposal Preparation and Submission page left navigation bar for information on demo site access and features.

- **Video Tutorials**
  Videos demonstrating key proposal preparation steps are available on the Research.gov About Proposal Preparation and Submission page Video Tutorials section.

- **Automated Proposal Compliance Checks**
  Automated proposal compliance checks triggering an error message will stop proposal submission to NSF, whereas checks triggering a warning message will still allow proposal submission. Expanded compliance checking in Research.gov helps to reduce administrative burden for the research community and NSF staff, as well as minimizes return without review proposals. Refer to the Automated Compliance Checking of NSF Proposals page for the current automated Research.gov proposal checks.

- **Adding and Managing User Roles**
  To request an organizational role, please see the *Add a New Organizational Role* section of the Account Management Guide. After an organizational user role is requested, the organization's Administrator will receive the request electronically to approve or disapprove it. Additional information about adding and managing user roles can be found on the Research.gov About Account Management page.

- **NSF IT Service Desk**
  IT system-related and technical questions may be directed to the NSF IT Service Desk at 1-800-381-1532 (7:00 AM - 9:00 PM ET; Monday - Friday except federal holidays) or via rgov@nsf.gov.