

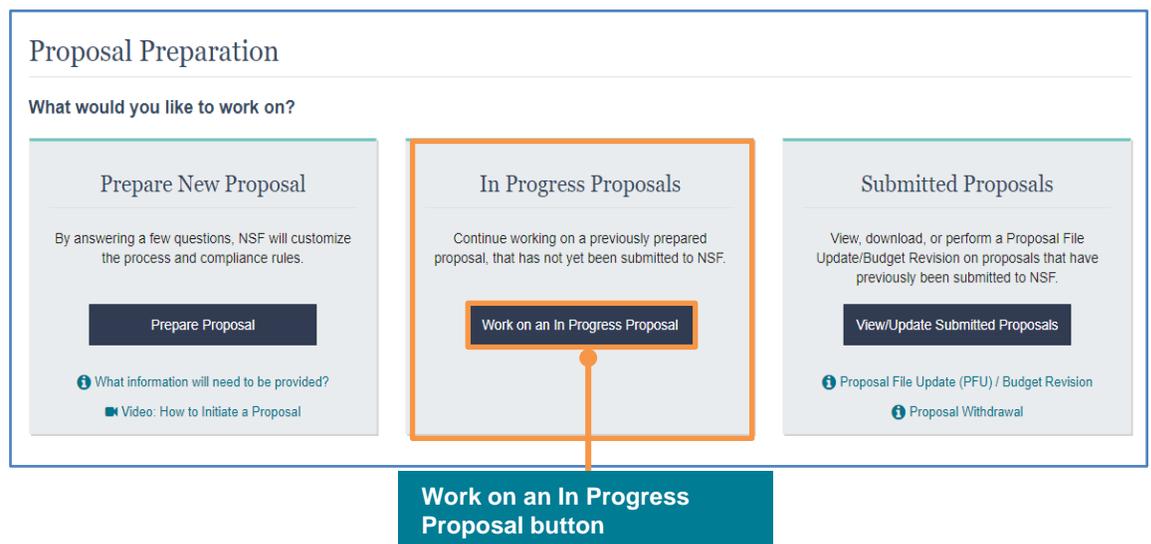
After the Principal Investigator (PI) has initiated a proposal or proposal file update/budget revision, the PI can share access with the Sponsored Projects Office (SPO) and Authorized Organizational Representative (AOR). If a co-PI has been added, the co-PI can also share the proposal or proposal file update/budget revision with the SPO and AOR. All affiliated SPOs and AORs at the PI's organization will receive a system-generated email notification when a proposal or proposal file update/budget revision access is shared.

Accessing the Research.gov Proposal Submission System:

- Open [Research.gov](https://www.research.gov).
- Click Sign In located at the top right of the screen to enter credentials.
- From the My Desktop page, select the Prepare and Submit Proposals (Limited Proposal Types) link under the Prepare & Submit Proposals category.
- Click the Continue to Proposal System button after reviewing the Welcome to NSF's Research.gov Proposal Submission System pop-up message.
- You will be navigated to the proposal preparation landing page.

How a PI/co-PI Shares Proposal Access with the SPO/AOR

- 1 Select the **Work on an In Progress Proposal** button located in the In Progress Proposals tile.



Proposal Preparation

What would you like to work on?

Prepare New Proposal

By answering a few questions, NSF will customize the process and compliance rules.

Prepare Proposal

What information will need to be provided?
Video: How to Initiate a Proposal

In Progress Proposals

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

Work on an In Progress Proposal

Submitted Proposals

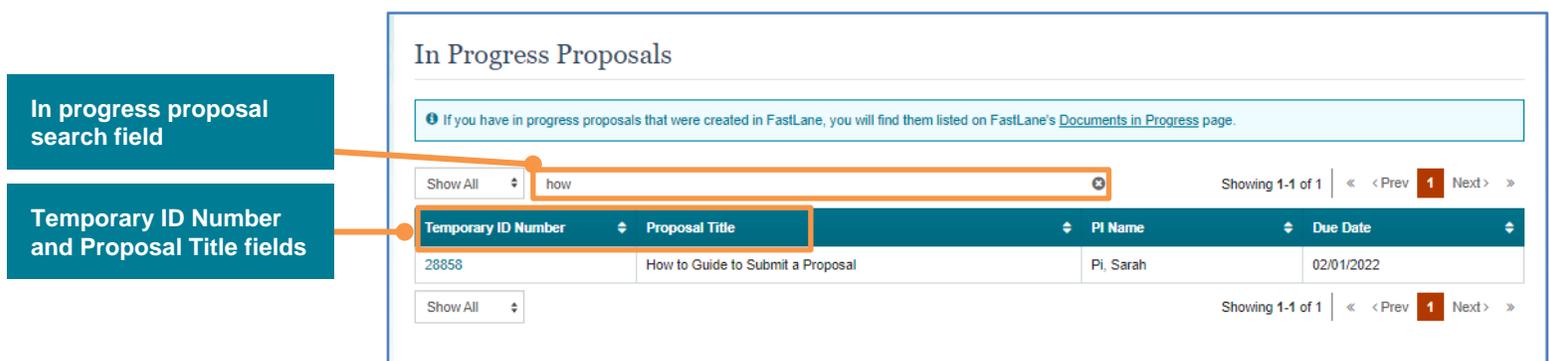
View, download, or perform a Proposal File Update/Budget Revision on proposals that have previously been submitted to NSF.

View/Update Submitted Proposals

Proposal File Update (PFU) / Budget Revision
Proposal Withdrawal

Work on an In Progress Proposal button

- 2 Locate the proposal on the **In Progress Proposals** list and click on the corresponding Temporary ID Number to open the proposal.



In progress proposal search field

Temporary ID Number and Proposal Title fields

In Progress Proposals

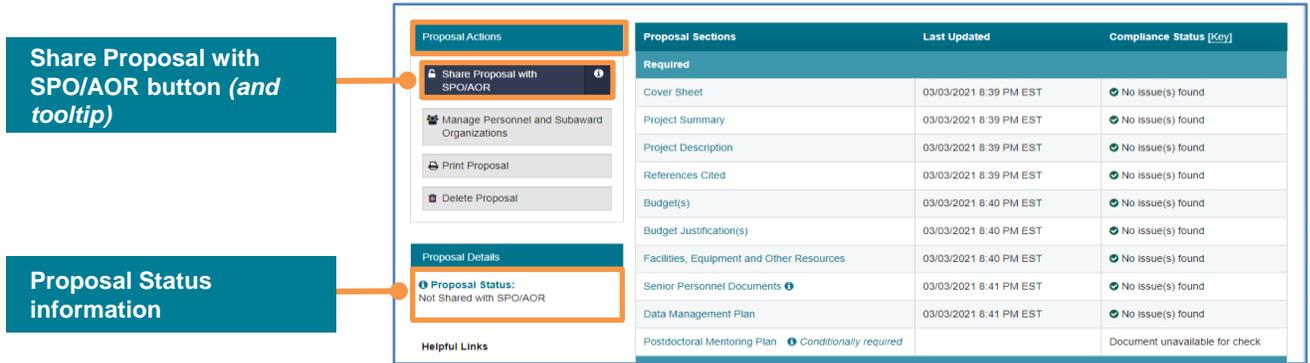
If you have in progress proposals that were created in FastLane, you will find them listed on FastLane's [Documents in Progress](#) page.

Show All | how | Showing 1-1 of 1 | << Prev 1 Next >>

Temporary ID Number	Proposal Title	PI Name	Due Date
28858	How to Guide to Submit a Proposal	Pi, Sarah	02/01/2022

Show All | Showing 1-1 of 1 | << Prev 1 Next >>

- 3** Select the **Share Proposal with SPO/AOR** button located in Proposal Actions section of the proposal main page.
- The system will run the current Research.gov [automated proposal compliance checks](#) after the Share Proposal with SPO/AOR button is clicked.
 - You will then be navigated to the Share Proposal with SPO/AOR screen.

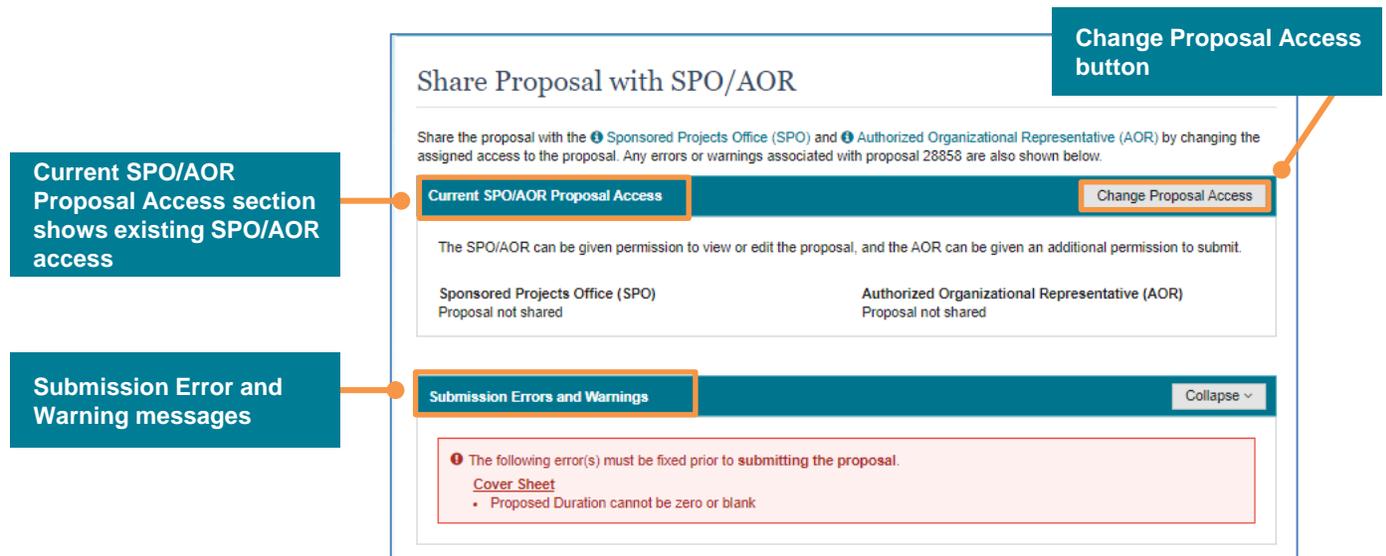


Share Proposal with SPO/AOR button (and tooltip)

Proposal Status information

Proposal Sections	Last Updated	Compliance Status [Key]
Cover Sheet	03/03/2021 8:39 PM EST	✔ No issue(s) found
Project Summary	03/03/2021 8:39 PM EST	✔ No issue(s) found
Project Description	03/03/2021 8:39 PM EST	✔ No issue(s) found
References Cited	03/03/2021 8:39 PM EST	✔ No issue(s) found
Budget(s)	03/03/2021 8:40 PM EST	✔ No issue(s) found
Budget Justification(s)	03/03/2021 8:40 PM EST	✔ No issue(s) found
Facilities, Equipment and Other Resources	03/03/2021 8:40 PM EST	✔ No issue(s) found
Senior Personnel Documents	03/03/2021 8:41 PM EST	✔ No issue(s) found
Data Management Plan	03/03/2021 8:41 PM EST	✔ No issue(s) found
Postdoctoral Mentoring Plan	Conditionally required	Document unavailable for check

- 4** Select the **Change Proposal Access** button on the Share Proposal with SPO/AOR screen.
- This screen displays the current SPO/AOR proposal access as well as any submission error and warning compliance messages triggered when the automated proposal compliance checks were run.
 - Proposal access can be shared with the SPO/AOR even if there are unresolved submission error and warning messages.



Change Proposal Access button

Current SPO/AOR Proposal Access section shows existing SPO/AOR access

Submission Error and Warning messages

Share Proposal with SPO/AOR

Share the proposal with the **Sponsored Projects Office (SPO)** and **Authorized Organizational Representative (AOR)** by changing the assigned access to the proposal. Any errors or warnings associated with proposal 28858 are also shown below.

Current SPO/AOR Proposal Access Change Proposal Access

The SPO/AOR can be given permission to view or edit the proposal, and the AOR can be given an additional permission to submit.

Sponsored Projects Office (SPO)
Proposal not shared

Authorized Organizational Representative (AOR)
Proposal not shared

Submission Errors and Warnings Collapse

The following error(s) must be fixed prior to submitting the proposal.

- Cover Sheet**
 - Proposed Duration cannot be zero or blank

5 Select the radio button for the level of proposal access to share with the SPO and AOR.

- SPO/AOR proposal access permissions can be updated by the PI/co-PI as needed during proposal preparation using these same steps.
- Each selected SPO and AOR access option (i.e., proposal not shared, view only access, and edit access) will be granted to all SPO and AOR personnel affiliated with the PI's organization.
- When selected, the allow proposal submission option is granted to all AORs affiliated with the PI's organization.
- Allow proposal submission permission must be provided to the AOR in order for the AOR to submit the proposal to NSF.
- Select the Save Proposal Access button to continue.
- **A system-generated email notification will be sent to the SPO and AOR personnel who have been granted access to the proposal or when access is changed.** See page 4 for an example of the notification email.

Change Proposal Access for SPO/AOR

Select the level of proposal access you would like to give to the Sponsored Projects Office (SPO) and Authorized Organizational Representative (AOR). Other personnel's access to the proposal can be updated from [Manage Personnel](#).

SPO/AOR Proposal Access	Proposal Access	Actions
Sponsored Projects Office (SPO) & Authorized Organizational Representative (AOR)	<input type="radio"/> Proposal not shared <input type="radio"/> View only access <input checked="" type="radio"/> Edit access <input checked="" type="checkbox"/> Allow proposal submission (AOR only)	View SPO/AOR Personnel

SPO/AOR Proposal Access options

Save Proposal Access button

List of SPO/AOR Personnel affiliated with the PI's organization

Share Proposal with SPO/AOR

✓ The proposal access has been successfully changed. An email notification has been sent to each person whose proposal access has been changed. AORs can now access the 'Initiate Proposal Submission' button from the main proposal page. ✕

Share the proposal with the **S** Sponsored Projects Office (SPO) and **A** Authorized Organizational Representative (AOR) by changing the assigned access to the proposal. Any errors or warnings associated with proposal 28858 are also shown below.

Current SPO/AOR Proposal Access	Change Proposal Access
The SPO/AOR can be given permission to view or edit the proposal, and the AOR can be given an additional permission to submit.	
Sponsored Projects Office (SPO) Edit access	Authorized Organizational Representative (AOR) Edit access with submit

Submission Errors and Warnings Collapse ▾

! The following error(s) must be fixed prior to submitting the proposal.

- [Cover Sheet](#)
 - Proposed Duration cannot be zero or blank

Success message

Updated SPO/AOR Proposal Access is shown in this section

Sample system-generated email notification sent to the SPOs/AORs to notify them when proposal access is shared:

To: <SPO/AORs email addresses>

Subject: Proposal 14303 shared with SPO/AORs

All Sponsored Project Office (SPO) and Authorized Organizational Representatives (AOR) have been given **View/Edit access** to the following proposal. Additionally, AORs now have the ability to **submit** this proposal.

Temporary Proposal ID: 14303

Proposal Title: Test Proposal

Date/Time Proposal Shared: 10/05/2020 6:00 PM EDT

Shared by: John Doe

The following users are included:

Authorized Organizational Representative (AOR)

O'Furniture, Patty

O'Furniture, Paddy

Ye, Olive

Bugg, Aida

Biologist, Maureen

Sponsored Projects Office (SPO)

Dactyl, Teri

This proposal can be accessed from your listing of in-progress proposals within Research.gov.

[Sign into Research.gov](#)

Need Help?

You can find helpful Research.gov information by clicking Help in the top right-hand corner of Research.gov.

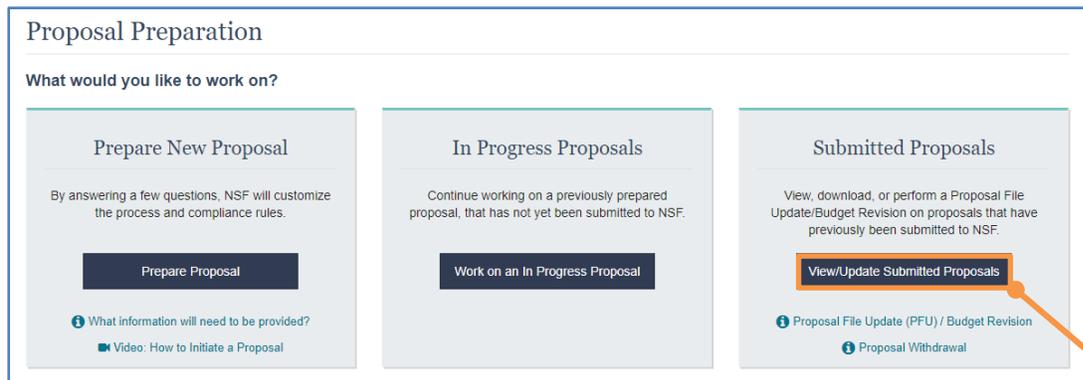
For additional assistance, please contact the NSF Help Desk at [1-800-381-1532](tel:1-800-381-1532) or Rgov@nsf.gov.

Please DO NOT REPLY TO THIS MESSAGE, as this email was sent from an address that cannot accept incoming messages.

How a PI/co-PI Shares Proposal File Update/Budget Revision Access with the SPO/AOR

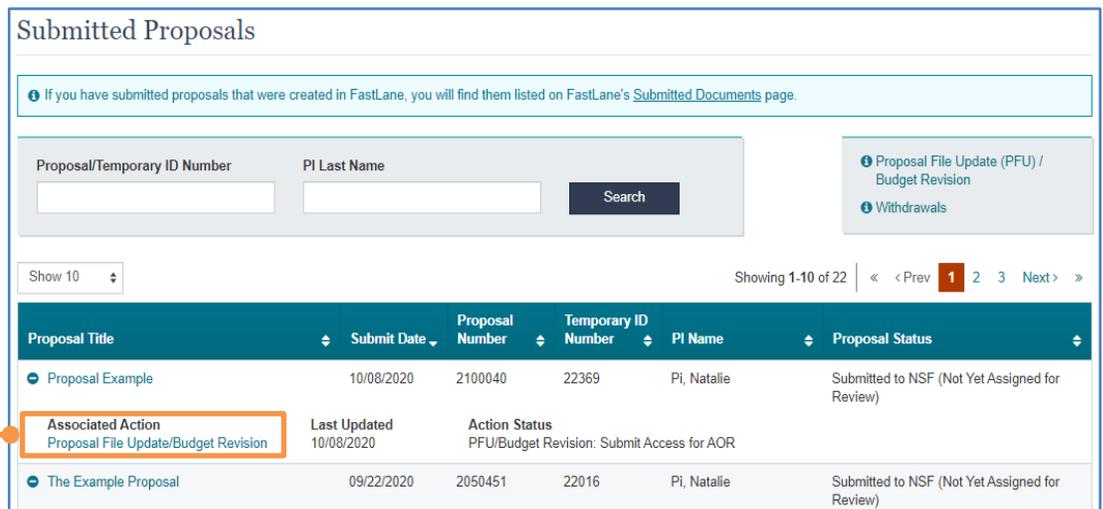
The PI/co-PI must share proposal access with the AOR specifically for the proposal file update/budget revision (i.e., shared access given to the AOR for the submitted proposal does not carry over to the proposal file update/budget revision).

- 1** Select the **View/Update Submitted Proposals** button located in the Submitted Proposals tile to access the proposal file update/budget revision.



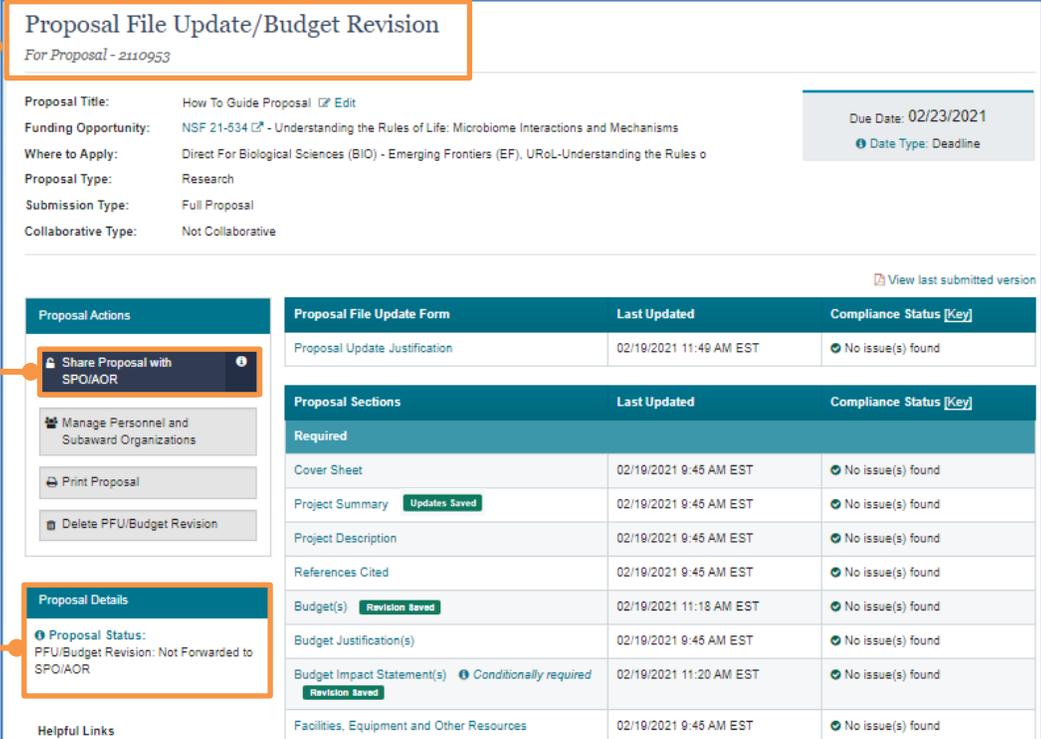
View/Update Submitted Proposals button

- 2** Locate the proposal on the **Submitted Proposals** list and then click on the proposal file update/budget revision link under the proposal Associated Action. You will be navigated to the Proposal File Update/Budget Revision Details page.



Proposal File Update/Budget Revision

3 Select the Share Proposal with SPO/AOR button for the proposal file update/budget revision.



Header indicates proposal file update/budget revision

Share Proposal with SPO/AOR button

Proposal status will change after proposal access is updated

Proposal File Update/Budget Revision
For Proposal - 2110953

Proposal Title: How To Guide Proposal Edit
 Funding Opportunity: NSF 21-534 - Understanding the Rules of Life: Microbiome Interactions and Mechanisms
 Where to Apply: Direct For Biological Sciences (BIO) - Emerging Frontiers (EF), URoL-Understanding the Rules of
 Proposal Type: Research
 Submission Type: Full Proposal
 Collaborative Type: Not Collaborative

Due Date: 02/23/2021
Date Type: Deadline

View last submitted version

Proposal Actions	Proposal File Update Form	Last Updated	Compliance Status [Key]
<input checked="" type="checkbox"/> Share Proposal with SPO/AOR <input type="checkbox"/> Manage Personnel and Subaward Organizations <input type="checkbox"/> Print Proposal <input type="checkbox"/> Delete PFU/Budget Revision	Proposal Update Justification	02/19/2021 11:49 AM EST	<input checked="" type="checkbox"/> No issue(s) found

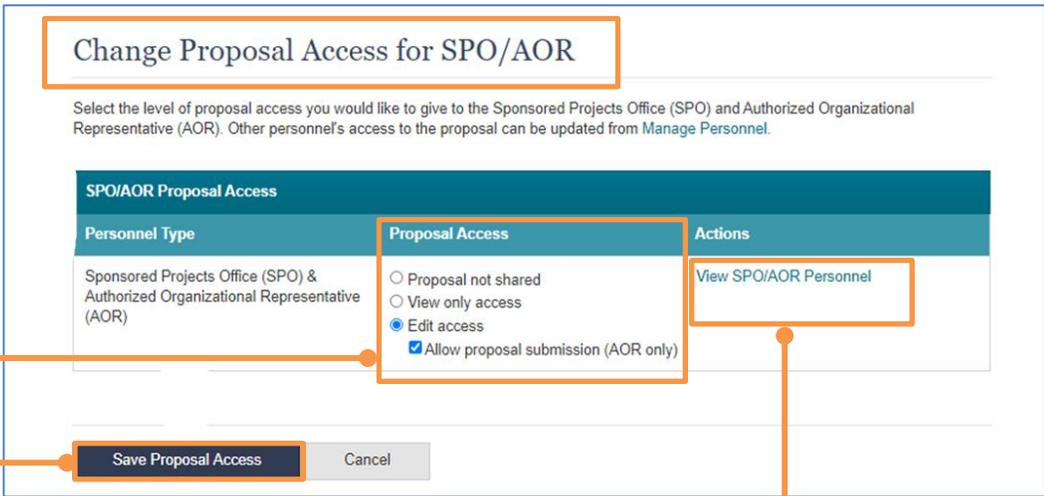
Proposal Sections	Last Updated	Compliance Status [Key]
Required		
Cover Sheet	02/19/2021 9:45 AM EST	<input checked="" type="checkbox"/> No issue(s) found
Project Summary <input checked="" type="checkbox"/> Updates Saved	02/19/2021 9:45 AM EST	<input checked="" type="checkbox"/> No issue(s) found
Project Description	02/19/2021 9:45 AM EST	<input checked="" type="checkbox"/> No issue(s) found
References Cited	02/19/2021 9:45 AM EST	<input checked="" type="checkbox"/> No issue(s) found
Budget(s) <input checked="" type="checkbox"/> Revision Saved	02/19/2021 11:18 AM EST	<input checked="" type="checkbox"/> No issue(s) found
Budget Justification(s)	02/19/2021 9:45 AM EST	<input checked="" type="checkbox"/> No issue(s) found
Budget Impact Statement(s) <input checked="" type="checkbox"/> Conditionally required <input checked="" type="checkbox"/> Revision Saved	02/19/2021 11:20 AM EST	<input checked="" type="checkbox"/> No issue(s) found
Facilities, Equipment and Other Resources	02/19/2021 9:45 AM EST	<input checked="" type="checkbox"/> No issue(s) found

Proposal Details
 Proposal Status: PFU/Budget Revision: Not Forwarded to SPO/AOR

Helpful Links

4 Select the SPO/AOR Proposal Access options for the proposal file update/budget revision.

- Click the Save Proposal Access button to continue.
- SPO/AOR proposal file update/budget revision access permissions can be updated by the PI/co-PI as needed during proposal preparation using these same steps.



Change Proposal Access for SPO/AOR

Select the level of proposal access you would like to give to the Sponsored Projects Office (SPO) and Authorized Organizational Representative (AOR). Other personnel's access to the proposal can be updated from Manage Personnel.

SPO/AOR Proposal Access	Proposal Access	Actions
Personnel Type Sponsored Projects Office (SPO) & Authorized Organizational Representative (AOR)	<input type="radio"/> Proposal not shared <input type="radio"/> View only access <input checked="" type="radio"/> Edit access <input checked="" type="checkbox"/> Allow proposal submission (AOR only)	<input checked="" type="checkbox"/> View SPO/AOR Personnel

Save Proposal Access

Share Access with SPO/AOR options

Select Save Proposal Access to continue

List of SPO/AOR Personnel affiliated with the PI's organization

- 5** After sharing access to the proposal file update/budget revision with the SPO/AOR, a success message will display. **A system-generated email notification will be sent to all SPOs/AORs associated with the PI's organization who are granted new or updated access to the proposal file update/budget revision.** See page 4 for an example of the notification email.

Success message

Share Proposal with SPO/AOR

✔ The proposal access has been successfully changed. An email notification has been sent to each person whose proposal access has been changed. AORs can now access the 'Initiate Proposal Submission' button from the main proposal page. ✕

Share the proposal with the 👤 Sponsored Projects Office (SPO) and 👤 Authorized Organizational Representative (AOR) by changing the assigned access to the proposal. Any errors or warnings associated with proposal 27645 are also shown below.

Current SPO/AOR Proposal Access
Change Proposal Access

The SPO/AOR can be given permission to view or edit the proposal, and the AOR can be given an additional permission to submit.

Sponsored Projects Office (SPO) Edit access	Authorized Organizational Representative (AOR) Edit access with submit
--	---

- i** The Submitted Proposals page displays the proposal file update/budget revision under the associated submitted proposal, together with the status and date of the most recent update.

Submitted Proposals

👤 Proposal File Update (PFU) / Budget Revision
👤 Proposal Withdrawal

Proposal Title	Submit Date	Proposal Number	Temporary ID Number	PI Name	Proposal Status
How To Guide Proposal	02/19/2021	2110953	27645	PI, Natalie	Submitted to NSF (Not Yet Assigned for Review)
Associated Action Proposal File Update/Budget Revision	Last Updated 02/19/2021	Action Status PFU/Budget Revision: Not Forwarded to SPO/AOR			

Example in progress proposal file update/budget revision with access not shared with the SPO/AOR

Submitted Proposals

👤 Proposal File Update (PFU) / Budget Revision
👤 Proposal Withdrawal

Proposal Title	Submit Date	Proposal Number	Temporary ID Number	PI Name	Proposal Status
How To Guide Proposal	02/19/2021	2110953	27645	PI, Natalie	Submitted to NSF (Not Yet Assigned for Review)
Associated Action Proposal File Update/Budget Revision	Last Updated 02/19/2021	Action Status PFU/Budget Revision: Submit Access for AOR			

Example in progress proposal file update/budget revision with submit access granted to the AOR

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.

- **Proposal Preparation FAQs**

Frequently Asked Questions (FAQs) organized by topic are available on the Research.gov [About Proposal Preparation and Submission](#) page left navigation menu.

- **Video Tutorial**

A 16-minute Research.gov Proposal Demo video is posted on the [About Proposal Preparation and Submission](#) page [Video Tutorials](#) section which shows key proposal preparation steps.

- **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. This includes giving view, edit, and/or submit access to the SPO/AOR. However, the demo site does not include real SPO/AOR users, proposals cannot be submitted in the demo site, and no system-generated email notifications will be created or sent. See the demo site FAQs on the Research.gov [About Proposal Preparation and Submission](#) page left navigation menu for information on demo site access and features.

- **Automated Proposal Compliance Checks**

Automated proposal compliance checks triggering an error message will prohibit proposal and proposal file update/budget revision submission to NSF, whereas checks triggering a warning message will still allow proposal and proposal file update/budget revision submission. Expanded compliance checking in Research.gov reduces 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 work on proposals using NSF systems, a PI must have an organization-approved PI role. The PI role can be requested by following the steps on the [Add a New Role – Principal Investigator PI/Co-PI](#) job aid. Information about adding and managing other user roles such as the AOR role required for proposal and proposal file update/budget revision submission can be found on the Research.gov [About Account Management](#) page.

- **NSF Help Desk**

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