

Register for an NSF Account to Begin Using FastLane and Research.gov

NSD

Account Management

Register for an NSF Account to Begin Using FastLane and Research.gov

To submit proposals to the National Science Foundation (NSF) and conduct other award-related activities using NSF systems, you must 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.

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

- Access the <u>NSF ID Lookup</u> page to search for an existing NSF account.
- If you forgot your password for an established NSF account, <u>click here</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. <u>Click here</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 to this email account, even if you were to ever change organizations.

- Check the boxes to confirm you are not a robot and 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 and then 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!

Step 4: Add a New Role

 Now that you have an NSF account, you can add roles to your account profile. <u>Click here</u> for detailed instructions.

| Account Registration | | |
|--|--|---|
| | | |
| Forget/Legis Lip your NRF ID? | pecifies that each individual user of NSF systems should not i | tave more than one NSF ID (Chapter I.G.4 |
| | | |
| * Required Fields | | |
| Prefix First Name | Middle Name/Initial Last Name | Suffix |
| Select Prefix 💌 | | Select Suf |
| Attornata Name(5) Nekwene, meiden name, etc. | | |
| | | |
| | | |
| Primary Email Provide NSF account password recovery | * Confirm Primary Email | |
| | | |
| Secondary Email 9 | Confirm Secondary Email | |
| | | |
| | | |
| ORCID ID 😳 16-sigks in: 1234-1234-1234-1234 | Phone Number | Extension |
| | | |
| NSF asks for demographic data relating to gender, ethnicity/state and benefiting everyone regardless of demographic category, and to ensi- vecancies, and other research and educational opportunities as ever | ire that those in under-represented groups have the same known | weldge of and access to programs, meeting |
| * Gender (Please selections) | * Ethnicity (Please select one) | |
| O Male | O Hapanic or Latino O | |
| O Female | O Not Hispenic or Letina | |
| O De net wish to provide | O Do not wish to provide | |
| · Race (Pience select al that apply) | * Do you have a disability? (Please select one) | |
| Race Delintions | O What is considered a disability? | |
| C American Indian or Alaska Native | C Yes | |
| Asian | ○ No | |
| Black or Attican American | O Do not wish to provide | |
| Native Havailan or Other Pacific Islander | | |
| C Willia | | |
| Other (Please specify) | | |
| De not wish to provide | | |

Preview Account Registration Review your information for accuracy Dr. Prefix: First Name: John Middle Name/Initial Last Name: Doe Suffix .Ir Alternate Name(s): Johnny Doe Primary Email: johndoe@testemail.com Secondary Email: john@doe.net ORCID ID: () Phone Number: (123) 456-7890 Extension: 2 Gender Do not wish to provide Do not wish to provide Race Ethnicity Do not wish to provide Disability Do not wish to provide Edit Figure 3

Figure 2

| Account Registration Confirmation |
|--|
| |
| Your account has been successfully created. |
| An activation email was sent to: Claude7575@1.com |
| Your NSF ID is: 000900873 |
| 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. |
| |

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



Working at Multiple Organizations or Moving to Another Organization



Account Management

Working at Multiple Organizations or Moving to Another Organization

It is National Science Foundation (NSF) policy that only one NSF account is allowed per user. If you already have an NSF account, you MAY NOT register for a new NSF account even if you are working at multiple organizations, moving to another organization, or working as an Unaffiliated Principal Investigator (PI). 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 an Unaffiliated PI

- You can have multiple organizations associated with your NSF account, and you can add new roles from different organizations to your existing NSF account.
 - For more information about adding a role from a new organization or adding the Unaffiliated Principal Investigator role, <u>click here</u>.
- 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, <u>click here</u>.
- 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, <u>click here</u>.

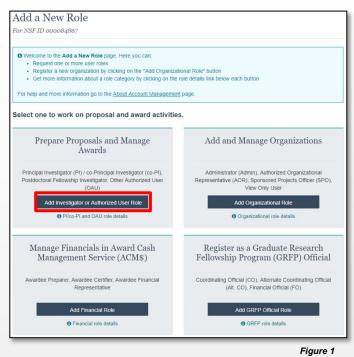
Adding a PI role at a new organization to your existing NSF account

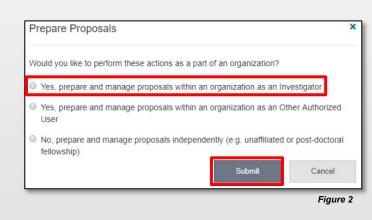
- Click "Sign In" located at the top right of <u>Research.gov</u> page.
- Enter your NSF ID and password and click "Sign In".
- · Click "My Profile" located at the top right of the screen.
- Click "Add New Role" from the left navigation bar.
- To request the Investigator role, click the blue "Add Investigator or Authorized User Role" button located in the "Prepare Proposals and Manage Awards" box and a five-step role request wizard will display. (Figure 1)
- Select "Yes, prepare and manage proposals with an organization" and click "Submit". (Figure 2)

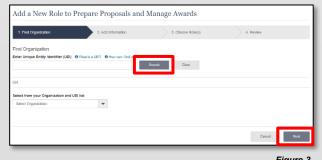
Step 1: Find Organization

- 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 may select the SAM UEI associated with your existing organization from the dropdown menu.
- Verify the correct organization is displayed and click "Next".

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









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)

| 1. Find Organization 🛩 | 2. Ad | d Information 3. Cho | ose Role(s) | 4. Review | |
|---|--------------|--|-------------|----------------|------|
| | | contact information for the selected organizatio see to update the contact information, all other | | | |
| Add Information | | | | | |
| The contact information will be used for all o | ommunication | as when performing in approved roles for this or | ganization | | |
| * Required | | | | | |
| | | | | | |
| Your Contact Details | | | | | |
| Work Phone Number | | * Work Email 0 | | | |
| (090) 909-0909 | | kim1@onn.com 👻 | | | |
| Your Degree Information * Degree Type AB - Associate in Science Your Work Address * Country | - | * Degree Year 2017 💌 | | | |
| Select Country | ÷ | | | | |
| * Street Address | | Street Address (Line 2) | Depa | artment Name | |
| | | | | | |
| * City | | * State | • Po | stal Code | |
| | | Select State | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | ancel Previous | Next |

Figure 4

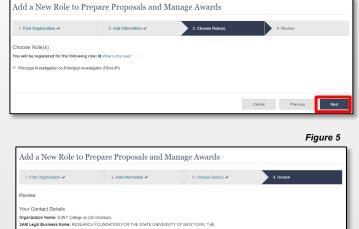
Success

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



Helpful Tips

- Your primary email address is used for notifications about your NSF account such as password resets.
- 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 prepopulated if you already have a Principal Investigator (PI) role at another organization. If you update this section, the change will be reflected in your PI role at all organizations.
- By default, the latest PI role will be set to primary.



| organization name: contributings at our restaury | | | |
|--|--------|----------|--------|
| SAM Legal Business Name: RESEARCH FOUNDATION FOR THE STATE UNIVERSITY OF NEW YORK, THE | | | |
| Role: Principal Investigator / co-Principal Investigator | | | |
| Work Email: mjordan@nsf.gov | | | |
| Work Phone Number: (123) 867-5309 | | | |
| Your Degree Information | | | |
| Degree Type: DPhil - Doctor of Philosophy | | | |
| Degree Year: 2020 | | | |
| | | | |
| Your Work Address | | | |
| Country: United States | | | |
| Street Address: 1234 Street Address | | | |
| Street Address (Line 2): | | | |
| Department Name: | | | |
| City: Alexandria | | | |
| State: California | | | |
| Postal Code: 90036 | | | |
| | | | |
| | | | |
| | | | |
| | Cancel | Previous | Submit |
| | | | |

Figure 6

| Add a New Role to Prepare Proposals and Man | age Awards |
|---|--|
| Success - your request has been forwarded to the organization contact(s) below. Check | the status of this request on the <u>View My Roles</u> page. |
| Organization Contact(s) | Organization Contact Type |
| Cariolo, Ian | Administrator |
| BRIGGS, VICTOR B | SAM POC |
| HALE-MORRIS, SHIRLEE K | SAM POC |
| MORRIS, SHIRLEE K | SAM POC |
| Continue to My Profile > | |
| Add Additional Roles > | |



Navigating the Account Management Links

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 Help Desk at 1-800-381-1532 or <u>rgov@nsf.gov</u>.

Version 1.6, Updated May 2nd, 2022



Research.gov

The Account Management system includes pages for Administrators to manage user and organization information and pages for users to self-manage their roles and profile information. Access these pages and the updated functionality by signing in to <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 Primary Email Address or 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 in to Research.gov in January 2022. Use of Login.gov to sign in to Research.gov is optional, and the research community is still able to use their NSF Account or their university-issued credentials through the InCommon integration to sign in to Research.gov. A user who has an NSF account linked to their organizational credentials or Login.gov credentials available on the **"NSF User Sign In"** page (Figure 2) will also be navigated to the **"My Profile"** menu tab after signing in to Research.gov This guide provides instructions for only the **"NSF Account"** sign in option.

Where do the left navigation bar links take me?

Account Management Link

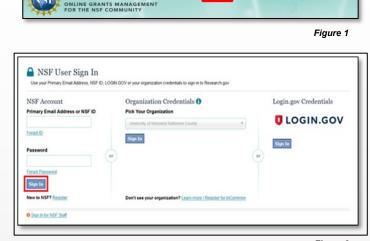
My Profile / View/Edit My

Change Password

View My Roles

View My

Profile



Sign In Register | Home | Contact | Help | Ab



bar links take me? Functionality View and edit your profile, demographic and academic information Change your Research.gov and FastLane password 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. |
|----------------|--|

| y Users | You will only see this link if you're an Administrator of an organization. |
|---------|--|
| | |

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
organizationAbout Account Management
Access job aids, instructional videos, and FAQs to guide you through the Account
Management functionalityProposals, Awards, & StatusAccess the FastLane Proposals, Awards, & Status page. This page will open in a new tab.

Research Administration Access the FastLane Research Administration page. This page will open in a new tab.



View and Edit My NSF Account Profile Information



Hide Menu

My Roles

View/Edit Profile Change Passwor

View My Roles Add a New Role My Organizations View My Users Quick Links

About Account Ma

Once you have a National Science Foundation (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.

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 Primary Email Address or 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)

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)

<u>Important Note</u>: 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.



| Research.gov | Welcome Claude Elton Logout (Home) | My Profile Contact Help About |
|--------------|--------------------------------------|-----------------------------------|
| | | Figure 3 |

My Profile

Figure 2

tions, you car

iaure 6

| | | _ | Contact information | Demographic Information | Protessional Informa | tion |
|----------|--|---|---|--|------------------------------|------------------------|
| | My Profile For NSFID 000071916 | | This is your information for you do so on the View My Roles p * Required Prefix | ur NSF account. If you need to chang age. | e your contact information a | t one of your organiza |
| | Contact Information Demographic Information Professional Information This is your information for your NSF account. If you need to change your contact information at one of your organizations, you can do so on the View My Roles page. Name Name Steven P Rider Alternate Name(s) None Provided Provided Provided Secondary Email () Frovided Phone Number (003) 685-9970 Edd | | Select Prefix V · First Name Suren Suffix Select Suffix V Alternate Name(s) (Noinnam · Primary Email © For NSF A Issien@iesting.com Secondary Email © Phone Number (503) 595-5970 Seve Cancel | | | ast Name |
| nagement | Figure 5 | | | | | F |
| & Status | | | | | | |
| tration | | | | | | |
| Figure 4 | | _ | | 1 | | |



To ensure compliance with NSF's policy of allowing only one NSF account per user, you will not be able to save any email addresses to your account profile that are associated with another NSF account.



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.

Step 3: Edit your Demographic Information

- Click "Edit" at the bottom of the Demographic Information tab in the My Profile page. (Figure 7)
- Enter your updated demographic information for Gender, Race, Ethnicity and Disability status and click "Save". (Figure 8)

Important Notes:

- Submission of the requested ٠ demographic information is required. Until responses to all demographic questions are provided, the "Save" button will be disabled. (Figure 8)
- The "Other" option for Race question will prompt a free text field for entry. (Figure 8)



| pportunities in science and insure that those in under-re | technology are fairly reaching and bene presented groups have the same know | d disability to gauge whether our programs and other fifting everyone regardless of demographic category; and ledge of and access to programs, meetings, vacancies, a more information, read why this information is being requ |
|--|--|--|
| Required | | |
| Gender (Please select one |) | |
| Male | | |
| Female | | |
| Do not wish to provide | | |
| Race (Please select all that | t apply) | |
| Race Definitions | | |
| American Indian or Alask | a Native | |
| Asian | | |
| Black or African American | | |
| Native Hawaiian or Other | Pacific Islander | |
| 2 White | | |
| Other (Please specify) | | |
| | | |
| Do not wish to provide | | |
| Ethnicity (Please select or | (a) | |
| Hispanic or Latino 0 | | |
| Not Hispanic or Latino | | |
| Do not wish to provide | | |
| Do you have a disability? | (Please select one) | |
| What is considered a disa | | |
| Yes | | |
| No | | |
| Do not wish to provide | | |
| | | |
| | | |



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.

Step 4: Edit your Professional Information

- Click "Edit" at the bottom of the Professional Information tab in the My Profile page. (Figure 9)
- Enter your updated professional information and click "Save". (Figure 10)

| Contact Information | Demographic Information | Professional Information | |
|---------------------|-------------------------|--------------------------|--|
| DRCID ID 💿 | | | |
| None Provided | | | |

| ID O 10 digits ie. 1234-1234-1234 |
|-----------------------------------|
| iD 🕲 18 digits ie. 1234-1234-1234 |
| D 🕼 18 digits ie. 1234-1234-1234 |
| |
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| |



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 on page 9)
- Within the **Contact Information** tab in the **My Profile** page, click "Pending Your Verification" located to the right of the primary email address. (Figure 6)
- Select "Click here to Resend the verification link email." (Figure 7)
- A new verification email will be sent to your pending primary email address (i.e., the updated email address entered in Step 2 on Page 9).

Important Note: 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 on page 9)

How do I change my password?

- Select the "View/Edit My Profile" option. (Refer to Step 1 on page 9)
- Click "Change Password" located in the left navigation bar. (Figure 6)
- Update your password and click "Change Password". (Figure 8)
- Once your password is successfully changed, you will receive a password change notification on the screen. (Figure 9)
- You have successfully changed your password!
- Click "Continue to Research.gov" to keep working. (Figure 9)



Helpful Tip

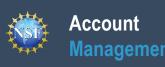
Passwords are valid for 365 days before required renewal.

| Wrwit dit Profile My Profile Vewit dit Profile For NSE ID occord;19.05 Vow My Dicks Contact Information Vow My Dicks Contact Information Add a New Role Contact Information for your NSF account. If you need to change your contact Information at one of your organizations, you can do so on the Your My Roles page. Add a New Role This is your information for your NSF account. If you need to change your contact Information at one of your organizations, you can do so on the Your My Roles page. Nome Steven P Roler Add Account Management Nome Provided Propositi, Arwards & Stabus Prinsing Contact information (Contact Information Information Information) | My Desktop | Proposals | Awards & Reporting | Manage Financials | Administration |
|--|----------------------------|-------------------------------|-------------------------|--|-----------------------------|
| Worktid Public My Profile Durage Drewood For NSETD coccorrgate Wy Rate Add New Fide My Carlier This is your information for your NSF account. If you need to change your cortact information at one of your organizations, you can do so on the Your My Roles page. Mod Account Management This is your information for your NSF account. If you need to change your cortact information at one of your organizations, you can do so on the Your My Roles page. About Account Management Proposite, Anoreth & Status * Research Administration Primary Tenal 0 (Primary Good Verlage Control Verlage Contr | l Hide Menu | | | | |
| Note States Contact Information Demographic Information Professional Information Add a New Role: Voc. My Organizations v Voc. My Organizations (Voc. Professional Information at one of your organizations, you can information to the of your organizations, you can information at States Name Add a New Role: Voc. My Roles page. Name About Account Management Alternate Name(a) Alternate Name(a) Proposale. Analy 5. State One Provided Primary Final 0 (Primary Gold Device) Vol. Worksteine Secondary Final O Primary Final O (Primary Final O Phone Number (503) 1595-5970 Primary Final O | | | | | |
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| Weer My Users Name Oack Links V About Accound Management Alternate Name(s) Proposals Avandes Statue Prinsing Family (6 presents your lower laws) # Research Administration Secondary Email (6 presents your lower laws) Phone Number (505) 565-5870 | | | | nge your contact information at one of | your organizations, you can |
| About Account Management Propositis, Avanda & Status # Propositis, Avanda & Status Press (0,0) # Rescarch Administration O Francing Your Variation More Provide O Francing Your Variation # Rescarch Administration None Provide # Provide Your Variation Provide Your Variation | | | | | |
| Propositi, Avratik & Statin Primary Email O (© Primary You Variation You You Variation You | | | | | |
| None Provided Phone Number (503) 595-3870 | Proposals, Awards & Status | testaccount@nsf.go | | | |
| Edit | Research Administration | None Provided Phone Number | | | |
| | | Edit | | | |



| Change Password | |
|---|--|
| For Research.gov and FastLane | |
| | |
| Enter your temporary password as received to a | change your password. |
| • | |
| Enter your current password and then create a new pas | ssword. |
| NSF ID | |
| 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 |
| Confirm Password | 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 | |
| | Figure 8 |
| Change Password | |
| For Research.gov and FastLane | |
| | |
| Success - Password Changed | |
| | |
| Your password has been successfully changed in Rese | earch.gov and FastLane. |
| in the future, if you need to change your password, click | k the "My Profile" link on the top right of the page and select "Change Password". |
| Continue to Research.gov Continue to FastLan | e |

Note: Most FastLane functions can be reached directly from



Register a New Organization



Organizations must be registered with the National Science Foundation (NSF) to submit proposals using NSF's systems or via Grants.gov. Before a new organization can register with NSF, it must first be registered in the System for Award Management (SAM) at <u>https://www.sam.gov</u> and have a Unique Entity Identifier (UEI). Note that completion of the SAM registration process may take up to two weeks.

Follow the step-by-step process below to register a new organization with NSF.

How do I register a new organization with NSF?

- Open <u>Research.gov</u>
- Click "Sign In" located at the top right of the screen.
- Enter your Primary Email Address or 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 you need help registering in the System for Award Management (SAM), go to <u>https://sam.gov</u>
 - Note that completion of the SAM registration process may take up to two weeks.

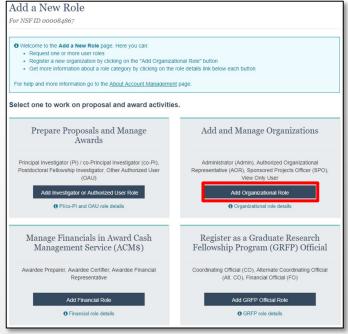


Figure 1

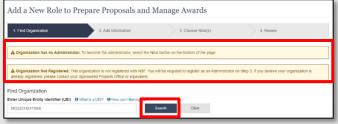


Figure 2



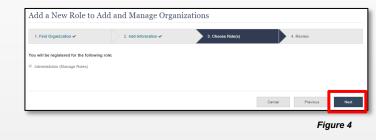
If a new organization is registered with NSF without an Administrator, the first user to request a role will become the organization's first Administrator.



How do I register a new 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 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. Ch | oose Role(s) | 4. Review | |
|---|---|--------------|-------------------------------|---|
| Add Information | | | | |
| The contact information will be used for all co | mmunications when performing in approved roles for this org | anization | | |
| * Required | | | | |
| | | | | |
| Your Contact Details | | | | |
| * Work Phone Number | * Work Email 0 | | | |
| <u> </u> | Select Work Email | | | |
| | | | | |
| Organization Details | | | | |
| | | | | |
| * Organization Short Name | * Organization Type | | * Time Zone 0 | |
| * Organization Short Name | * Organization Type Select Organization Type | • | * Time Zone Select Time Zone | • |
| * Organization Short Name * Organization Phone Number | | • | | • |
| | Select Organization Type | • | Select Time Zone | • |
| | Select Organization Type | • | Select Time Zone | • |
| | Select Organization Type | • | Select Time Zone | ٣ |
| | Select Organization Type | • | Select Time Zone | • |



| 1. Find Organization 🗸 | 2. Add Information 🗸 | 3. Choose Role(s) 🗸 | 4. Review | |
|--------------------------|--|--------------------------|-----------|--|
| Review | | | | |
| Organization Name: | SUNY College at Old Westbury | | | |
| SAM Legal Business Name: | RESEARCH FOUNDATION FOR THE STATE UNIT | VERSITY OF NEW YORK, THE | | |
| Role(s): | Administrator | | | |
| Work Email: | gblock@associates.nsf.gov | | | |
| Work Phone Number: | (123) 867-6309 | | | |
| | | | | |
| | | | | |

Figure 5

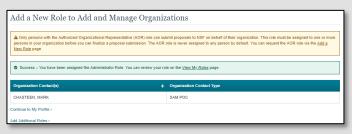


Figure 6



Add a New Role



Account Management

Add a New Role

To work on proposal and award activities on National Science Foundation (NSF) systems, a user must have an organizationapproved role at an organization registered with NSF. To request a role from your organization, you must sign in to <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.

| r NSF ID 000084867 | |
|--|--|
| Welcome to the Add a New Role page. Here you can: Request one or more user roles Register a new organization by clicking on the "Add Organizat Get more information about a role category by clicking on the | |
| For help and more information go to the About Account Managemen | g page. |
| elect one to work on proposal and award activitie | S. |
| Prepare Proposals and Manage Awards | Add and Manage Organizations |
| Principal Investigator (PI) / co-Principal Investigator (co-PI), Postdoctoral Fellowship Investigator, 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 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 Officia (Alt. CO), Financial Official (FO) |
| Add Financial Role | Add GRFP Official Role |
| Financial role details | GRFP role details |

Figure 1 shows the four 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 five-step role wizard. Note that beneath each dark blue **Add Role** button, there is an information link (e.g., PI/co-PI 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 role(s) | To perform these functions | Select this "Add Role" Button |
|--|---|---|
| Principal Investigator (PI) Co-Principal Investigator (co-PI) Unaffiliated Fellowship Principal Investigator | Prepare proposals Manage awards | Add Investigator or Authorized User Role |
| Administrator Sponsored Projects Officer (SPO) Authorized Organization 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 |



Role Request Wizard Steps

No matter the role you choose to add, the same four-step process is followed.

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 dropdown menu to select the UEI associated with your NSF-registered organization.
- Verify the correct organization is displayed in the results section and click "Next". (Figure 2)

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

 If your organization is not registered in the System for Award Management (SAM) go to <u>https://www.sam.gov</u>. Note that completion of the SAM registration process may take up to two weeks.

Step 2: Add Information

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

Notes:

- If you are requesting a Principal Investigator role, you will need to enter additional data. Please see the following job aids for detailed instructions: <u>Add a New</u> <u>Role – Principal Investigator and Add a New Role –</u> <u>Unaffiliated Principal Investigator.</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 pre-populated with your work phone number and email.

| 1. Find Organization | 2. Add Information | 3. Choose Role(s) | 4. Review | |
|-------------------------------------|---|-------------------|-----------|-------|
| ind Organization | | | | |
| | What is a UEI? O How can I find my UEI? | 100 L | | |
| | | Search Clear | | |
| | | | | |
| R | | | | |
| elect from your Organization and UB | El list | | | |
| Select Organization | - | | | |
| | | | | |
| | | | | |
| | | | Cancel | Next |
| | | | Californ | 11030 |

| dd a New Role to Add and | l Manage Organizati | ons | | | |
|--|---|-------------------------|--------|----------|-------------|
| 1. Find Organization V | 2. Add Information | 3. Choose Role(s) | 4. | Review | |
| Existing role information: You currently have r lease review the information for accuracy. If you c | | | | | janization. |
| Id Information | | for this second set | | | |
| e contact information will be used for all communic equired | itions when performing in approved role | s for this organization | | | |
| fork Phone Number | * Work Email 0 | | | | |
| 202) 121-2222 | icariolo@mit.edu | - | | | |
| | | | | | |
| | | | | | |
| | | | Cancel | Previous | Next |
| | | | | Fig | ure 3 |



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), even 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 Role(s)

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

Note: Depending on the selected role, please be aware that some corresponding 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. O What | are these roles? | | | |
| Administrator (Manage Roles) | | | | |
| Authorized Organizational Representational Representation | sentative - AOR (Submit Proposals) | | | |
| Sponsored Projects Officer - SPC | (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 Rolo(s) 🗸 | 4. Review | |
|--------------------------|--|---------------------------|-----------|--|
| Review | | | | |
| Organization Name: | SUNY College at Old Westbury | | | |
| SAM Legal Business Name: | RESEARCH FOUNDATION FOR THE STATE UN | IVERSITY OF NEW YORK, THE | | |
| Role(s): | Authorized Organizational Representative | | | |
| Work Email: | gblock@associates.nsf.gov | | | |
| Work Phone Number: | (123) 867-5309 | | | |
| | | | | |
| | | | | |
| | | | | |

Success

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

| Show 5 💌 | | showing 1-5 of 6 « < Prev 1 2 | Ne |
|-------------------------|---|-------------------------------|----|
| Organization Contact(s) | ٥ | Organization Contact Type | |
| Endres, Paul | | Administrator | |
| Sahin-Sariisik, Asli | | Administrator | |
| CARROLL, MAYLON | | SAM POC | |
| GOCH, ADAM | | SAM POC | |
| LIVADAS, JERRY | | SAM POC | |
| | | showing 1-6 of 6 « < Prev 1 2 | Ne |

Figure 6

Helpful Tips

An email will be sent to the work email address you used to request a role on whether or not 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, to follow-up on your role request.



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

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 Help Desk at 1-800-381-1532 or <u>rgov@nsf.gov</u>.

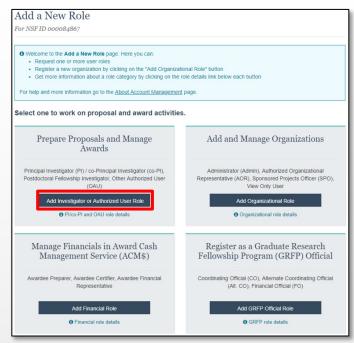
Version 1.6, Updated May 2nd, 2022

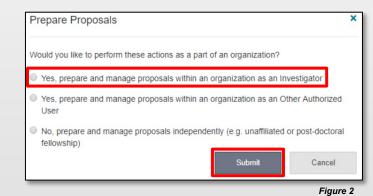


To work on proposal and award-related activities on National Science Foundation (NSF) systems, a Principal Investigator (PI)/ co-Principal Investigator (co-PI) must have the Investigator role at an organization. After requesting a role, your organization's Administrator will receive the request electronically to approve or disapprove it. To request a role, you need to sign in to <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 the Investigator role, click the blue "Add Investigator or Authorized User Role" button located in the "Prepare Proposals and Manage Awards" box and a five-step role request wizard will display. (Figure 1)
- Select "Yes, prepare and manage proposals with an organization" and click "Submit". (Figure 2)



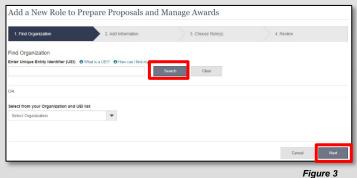


Four-Step Role Wizard

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 you may select the UEI associated with your existing organization from the dropdown menu.
- Verify the correct organization is displayed in the results section and click "Next".

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





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

Step 2: Add Information

Account

Management

 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 Organization Contacts for review and approval. (Figure 7)
- You have successfully submitted a role request!

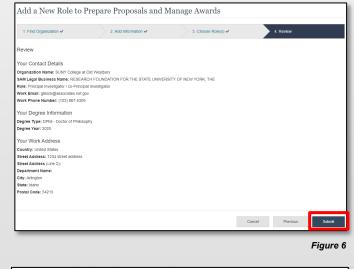
| 1. Find Organization 🗸 | | 2. Add | Information 3. Choose Ro | le(s) | 4. Review |
|---|--------|---------|---|---------------|---------------|
| | | | ntact information for the selected organization. All ro to update the contact information, all other roles for | | |
| Add Information The contact information will be used for all Required | oommun | cations | when performing in approved roles for this organization | on | |
| Your Contact Details | | | Work Email | | |
| (222) 222-2222 | | | adiyeh_ali@bah.com 🔻 | | |
| Your Degree Information * Degree Type AS - Associate in Science | | • | * Degree Year 2017 💌 | | |
| Your Work Address * Country | | | | | |
| Select Country | - | | | | |
| * Street Address | | | Street Address (Line 2) | Department N | ame |
| * City | | | * State | * Postal Code | |
| | | | Select State 🖤 | | |
| | | | | | |
| | | | | Cancel | Previous Next |

| Choose Role(s) | | | |
|---|----------------------------|--|--|
| ou will be registered for the following | role: O What is this role? | | |
| Principal Investigator/ co-Principal Inve | stigator (Pl/co-Pl) | | |
| | | | |
| | | | |

Figure 5

Y 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 prepopulated if you already have a Principal Investigator (PI) role at another organization. If you update this section, the change will be reflected in your PI role at all organizations.
 - By default, the latest PI role will be set to primary.



Add a New Role to Prepare Proposals and Manage Awards

| Irganization Contact(s) | Organization Contact Type | |
|-------------------------|---------------------------|--|
| diyeh, Ali | Administrator | |
| Colburn, Kimberly | Administrator | |
| ILENN, CHANCE GLENN M | SAM POC | |
| ONES, LATONIA | SAM POC | |
| BEMBE, BABATUNDE | SAM POC | |



Add a New Role – Unaffiliated / Postdoctoral Fellowship Principal Investigator



Add a New Role – Unaffiliated / Postdoctoral Fellowship Principal Investigator

To work on proposal and award-related activities on National Science Foundation (NSF) systems, you must have an Investigator role even if you are working independently and are not affiliated with an organization. To request an Investigator role, you need to 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

- To request the Investigator role, click the blue "Add Investigator or Authorized User Role" button located in the "Prepare Proposals and Manage Awards" box and a three-step process will display. (Figure 1)
- Select "No, prepare and manage proposals independently (e.g. Unaffiliated or post-doctoral fellowship)" and click "Submit". (Figure 2)

Three-Step Process

Step 1: Add Information

Input data into all required fields that have a red asterisk (*) and click "Next". (Figure 3)

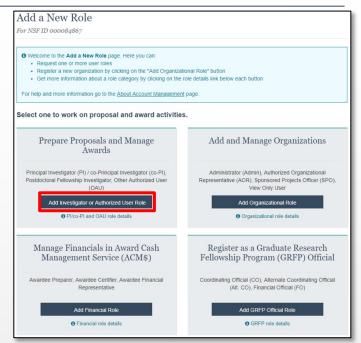
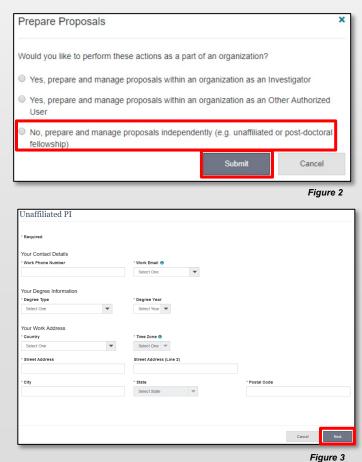


Figure 1



Helpful Tips

:0:

- The third option in the "Prepare Proposals and Manage Awards" modal box (Figure 2) is disabled if you already have an Unaffiliated PI role. To view your current Unaffiliated PI 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 prepopulated if you already have a Principal Investigator (PI) role at any other organization. If you update this section, the change will be reflected in your PI role at all organizations.
- By default, the latest PI role will be set to primary.



Step 2: Review

• Review your information for accuracy and click "**Submit**". (Figure 4)

| Review your information for accuracy. Organization Name: Etion, Claude Revie Unantification Name: Etion, Claude Your Contact Ectabilis Work Final: Claude 7973@1 com Sperse Type: Bancher of Agriculture Degree Spers: B | Organization Name: Elfon. Claude Rele: Umilliand Principal Investigator Your Contact Details Work Inmait: Guade/777/g01 com Your Degree Information Degree Yes: Bancor of Agriculture Degree Yes: Bancor of Agriculture Degree Yes: Bancor of Agriculture Degree Yes: Bancor of Agriculture Degree Steel Address I Street Address I Three Address I Three Address I | | | | Figure 4 |
|---|---|---------------------------------------|--|----------|----------|
| Organization Name: Etion, Claude Rele: Unaffiliated Principal Investigator Your Contact: Defails Work Phone Number: 234225555 Work Email: Claude://7370g11.com Your Degree Information Degree Yep: Eachier of Agriculture Degree Y | Organization Name: Etco, Caude Rele: Unaffiliated Principal Investigator Your Contact Defails Work Prince Number: 234245555 Your Work Email: Caude: 25750g 1 com Your Degree Information Degree Year: 200 Your Work Address Country: American Samo Time Zone: ProuticPago_Pago Street Address 1 Street Address 1 Street Address 1 | | | Previous | Submit |
| organization Name: Etion, Claude Rele: Unaffiliated Principal Investigator Your Contact Defails Work Phone Number: 23422555 Work Remark: Claude: 27570gf L com Your Degree Information Degree Yap: Sobiets of Agriculture Degree Yap: 200 Your Work Address Country: American Samo Time Zone: PracticPage_Page Street Address 1 Street Address 1 Street Address 1 | Organization Name: Etion, Claude Rele: Unaffiliated Principal Investigator Your Contact Details Work Prone Number: 234245555 Your Work Finad: Claude: 25750g 1 com Your Degree Information Degree Year: 200 Your Work Address Country: Anotic Pago_Pago Street Address 1 Street Address 1 Street Address 1 Street Address 1 | | | | _ |
| Organization Name: Eton, Claude Rel: Unaffiliated Principal Investigator Your Contact Details Work Prone Number: 234245555 Your Work Finad: Claude: 25750g 1 com Your Degree Information Degree Year: 200 Your Work Address Country, Anercan Samo Time Zone: ProuticPago_Pago Street Address 1 Street Address 1 Street Address 1 | Organization Name: Eton, Claude Rel: Unaffiliated Principal Investigator Your Contact Details Work Prone Number: 234245555 Your Work Finad: Claude: 25750g 1 com Your Degree Information Degree Year: 200 Your Work Address Country, Anercan Samo Time Zone: ProuticPago_Pago Street Address 1 Street Address 1 Street Address 1 | | | | |
| Organization Name: Eton, Claude Rel: Unaffiliated Principal Investigator Your Contact Details Work Prone Number: 234245555 Your Work Finad: Claude: 25750g 1 com Your Degree Information Degree Year: 200 Your Work Address Country, Anercan Samo Time Zone: ProuticPago_Pago Street Address 1 Street Address 1 Street Address 1 | Organization Name: Eton, Claude Rel: Unaffiliated Principal Investigator Your Contact Details Work Prone Number: 234245555 Your Work Finad: Claude: 25750g 1 com Your Degree Information Degree Year: 200 Your Work Address Country, Anercan Samo Time Zone: ProuticPago_Pago Street Address 1 Street Address 1 Street Address 1 | | | | |
| Organization Name: Etco, Caude Rele: Unaffiliated Principal Investigator Your Contact Defails Work Prince Number: 234245555 Your Work Email: Caude: 25750g 1 com Your Degree Information Degree Year: 200 Your Work Address Country: American Samo Time Zone: ProuticPago_Pago Street Address 1 Street Address 1 Street Address 1 | Organization Name: Etco, Caude Rele: Unaffiliated Principal Investigator Your Contact Defails Work Prince Number: 234245555 Your Work Email: Caude: 25750g 1 com Your Degree Information Degree Year: 200 Your Work Address Country: American Samo Time Zone: ProuticPago_Pago Street Address 1 Street Address 1 Street Address 1 | Postal Code: 444444 | | | |
| Organization Name: Elion: Claude Rele: Unaffilland Principal Investigator Your Contact Details Work Brank: Claude/276(g)1 com Your Degree Information Degree Yeek: Exote Address Degree Yeek: 2009 Your Work Address Geantry: American Samoat Time Zone: Pracific Amoat Time Zone: Pracific Amoat Street Address (Ind 2; 2) | Organization Name: Elion: Claude Rele: Unaffilland Principal Investigator Your Contact Details Work Brank: Claude/276(g)1 com Your Degree Information Degree Yeek: Exote Address Degree Yeek: 2009 Your Work Address Geantry: American Samoat Time Zone: Pracific Amoat Time Zone: Pracific Amoat Street Address (Ind 2; 2) | | | | |
| Organization Name: Etion, Caude Rele: Unafiliated Principal Investigator Your Contact Details Work Prince Number: 234245555 Work Finale: Caude: 27730g1 com Your Degree Information Degree Type: Stankier of Apriculture Degree Year: 2000 Your Work Address Country: American Samoa Time Zone, Pactic/Pago_Pago | Organization Name: Etion, Caude Rele: Unafiliated Principal Investigator Your Contact Details Work Prince Number: 234245555 Work Finale: Caude: 27730g1 com Your Degree Information Degree Type: Stankier of Apriculture Degree Year: 2000 Your Work Address Country: American Samoa Time Zone, Pactic/Pago_Pago | | | | |
| Organization Name: Elico, Caude Refe: Unaffillator Principal Investigator Your Contacl Details Work Brank: Clause?276(g)1.com Your Degree Information Degree Type: Bachtor of Agriculture Degree Type: Bachtor of Agriculture Degree Yay: Dog Pergree Yay: Dog Degree Yay: Dog | Organization Name: Elico, Caude Refe: Unaffillator Principal Investigator Your Contacl Details Work Brank: Clause?276(g)1.com Your Degree Information Degree Type: Bachtor of Agriculture Degree Type: Bachtor of Agriculture Degree Yay: Dog Pergree Yay: Dog Degree Yay: Dog | | | | |
| Organization Name: Etion, Claude Rele: Unaffiliated Principal Investigator Your Contract Details Work Brank trubuck 2375@1 con Your Degree Information Degree Name: Contract of Agriculture Degree Name: Contract of Agriculture Degree Name: Contract of Agriculture Degree Name: Contract of Agriculture | Organization Name: Etion, Caude Refe: Unaffliated Principal Investigator Your Contract Details Work Email: Claude/575(g): com Your Degree Information Degree Name: One Degree Var:: com | | | | |
| Organization Name: Eton, Claude Rate: Unafiliated Principal Investigator Your Contract Details Work Innai: Claude/77/2011 com Your Degree Information Opegree Information Opegree Year: 2009 | Organization Name: Eton. Caude Refe: Unamiliand Principal Investigator Your Contract Details Work Imaak: Caude/757/801 Loom Your Degree Information Degree Speciation of Apruture Degree Yeea: 2009 | Country: American Samoa | | | |
| Organization Name: Etion, Claude Rele: Unatiliated Principal Investigator Your Contact, Details Work Mone: Number: 232425555 Work Email: Claude/7575@t.com Your Degree Information Degree Type: Buchetor Agriculture | Organization Name: Etco, Caude Rele: Unatilitated Principal investigator Your Contact Details Work Rome Number: 234242555 Work Email: Caude/270(g) 1 com Your Degree Information | Your Work Address | | | |
| Organization Name: Eltor, Caude Rele: Unatiliated Principal Investigator Your Contact. Details Work Rene Namuber: 232425555 Work Email: Claude/375(g) com Pogree Type: Bachelior / Apriculture | Organization Name: Etco, Caude Rele: Unatilitated Principal investigator Your Contact Details Work Rome Number: 234242555 Work Email: Caude/270(g) 1 com Your Degree Information | Degree Year: 2009 | | | |
| Organization Name: Etion, Claude Rele: Unatifiated Principal Investigator Your Contact: Defails Work Phone Number 2342425555 Work Email: Clause?7767261.com Your Degree Information | Organization Name: Etco. Claude Rele: Unafiliated Principal Investigator Your Contact Details Work Prince Number: 234426555 Work Frank: Claude: 27573@1 com Your Degree Information | | | | |
| Organization Name: Etion, Claudo Role: Unatilialed Principal Investigator Your Contact: Defails Work Phone Number: 2342425555 | Organization Name: Eltor, Caude Role: Unatiliated Principal Investigator Your Contact, Details Work Phone Number, 232428555 | - | | | |
| Organization Name: Etion, Claude Role: Unatiliated Principal Investigator Your Contact: Defails Work Phone Number: 2342425555 | Organization Name: Eltor, Caude Role: Unatilitated Principal Investigator Your Contact, Details Work Phone Number, 23/2425555 | - | | | |
| Organization Name: Etion, Claude Role: Unatiliated Principal Investigator Your Contact, Details | Organization Name: Eltor, Claude Role: Unatilitade Principal investigator Your Contact Details | | | | |
| Organization Name: Elton, Claude Rele: Unatilitated Principal Investigator | Organization Name: Eltor, Claude Role: Unatilluido Principal Investigator | | | | |
| Organization Name: Ellon, Claude | Organization Name: Elton, Claude | | | | |
| | | | | | |
| Review your information for accuracy. | Review your information for accuracy. | Organization Name: Elton, Claude | | | |
| | | Review your information for accuracy. | | | |

Step 3: Confirmation

You have successfully added the Unaffiliated Principal Investigator role! (Figure 5)

| Unaffiliated PI |
|--|
| |
| Success! You may now independently prepare proposals or submit post-doctoral fellowship prop |
| Continue to My Profile > |
| Add Additional Roles > |
| |

Figure 5

V Helpful Tips

- Registering for an Unaffiliated / Postdoctoral Fellowship Principal Investigator Role creates an organization in Research.gov.
- You will become the Administrator of the newly created unaffiliated organization; however, other users cannot request roles or affiliate themselves with the organization



View My Roles – Requested Role(s)

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 Help Desk at 1-800-381-1532 or <u>rgov@nsf.gov</u>.

Version 1.6, Updated May 2nd, 2022



The View My Roles page shows the roles you have requested that 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.

Access the View My Roles page

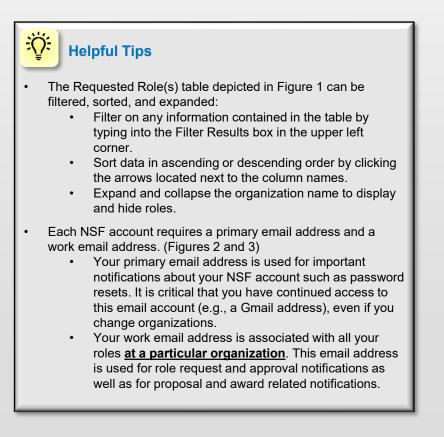
- Open <u>Research.gov</u>
- Click "Sign In" located at the top right of the screen.
- Enter your Primary Email Address or NSF ID and password and click "Sign In".
- Click "My Profile" located at the top right of the screen.
- Click "View My Roles" from the left navigation bar.

Filter Results Requested Role(s) Organization Name Work Phone Work Email Action SUNY College at Old Westbury [123] 857-5308 gblock@associates.nsf.go Edit Your Contact Info See Org Contact(s) Role(s) Date Added Other Authorized User (OAU) 11/17/2021 Administrator (Admin) 12/06/2021 Figure 1

How do I change my organization contact information for a non-Principal Investigator 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)
- <u>Users who have non-Principal Investigator roles</u> will see the screen depicted in Figure 2 and can edit their work phone number and work email address. Then click "**Save**". (Figure 2)

| 888888888 | claude11@claude11.com |
|---|-----------------------|
| Your information for Florida State University. ISF account information is located on My Profi Required Y Work Phone Number | * Work Email 🛛 |





How do I change my organization contact information for a Principal Investigator 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 an affiliated Principal Investigator role</u> will see the screen depicted in Figure 3 and can edit their contact details, degree information, and work 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)

| My Profile | | | | |
|------------|-------------|---|---|---|
| | | | | |
| | * Work Ema | ail O | | |
| | test_user2 | 2@te | ster.com | - |
| | * Degree Ye | ar | | |
| • | 2008 | | | - |
| | Street Addr | ress | (Line 2) | |
| | line 2 | | | |
| | | | | |
| * State | | | * Postal Code | |
| Virginia | • | • | 20171 | |
| | | | | |
| | * State | test_user test_user 2008 Street Addi line 2 | * Degree Year 2008 Street Address line 2 | test_user2@tester.com Degree Year 2008 Street Address (Line 2) line 2 State Postal Code |

🔆 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), even 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.

| Organization Contact(s) | × |
|-------------------------|--|
| | showing 1-5 of 34 < < Prev 1 2 3 4 5 Next> >> |
| Organization Contact(s) | Organization Contact Type |
| Debra Callaway | Administrator |
| Jasmine Campbell | Administrator |
| Lisa Cantore | Administrator |
| Nicky Choi | Administrator |
| Autumn Eck | Administrator |
| | showing 1-5 of 34 《 < Prev 1 2 3 4 5 Next> » |
| | Figure 4 |



View My Roles – Active Role(s)



The View My Roles page shows the roles you have requested that 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. You may set your Primary Organization designation if you have a Principal Investigator role at an organization or you are a Unaffiliated Principal Investigator.

Access the View My Roles page

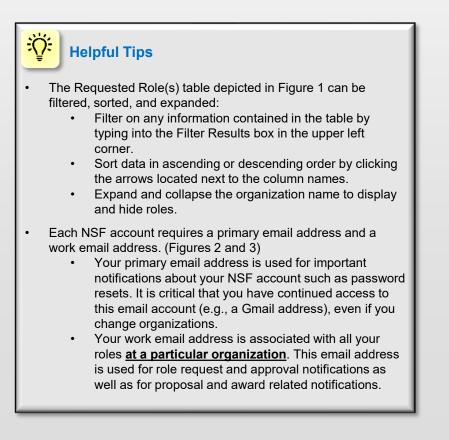
- Open <u>Research.gov</u>
- Click "Sign In" located at the top right of the screen.
- Enter your Primary Email Address or NSF ID and password and click "Sign In".
- Click "My Profile" located at the top right of the screen.
- Click "View My Roles" from the left navigation bar.

How do I change my organization contact information for a non-Principal Investigator 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)
- <u>Users who have non-Principal Investigator roles</u> will see the screen depicted in Figure 2 and can edit their work phone number and work email address. Then click "**Save**". (Figure 2)

| ive Role(s) | | | | | |
|--|--------------|---|-----------|------------|--|
| Organization Name | Work Phone | ¢ | Work Ema | | Action |
| Elton, Claude ✓ (PI Primary Organization) | 234-242-5555 | | Claude757 | 75@1.com | Edit Your Contact Infe See Org Contact(s) |
| Role(s) | | | ¢ | Date Added | |
| Unaffiliated Principal Investigato | r | | | 01/22/2018 | Primary Organization () |

| Edit | | | × |
|---|-----------------------|-----|----------|
| Your information for Florida State University. NSF account information is located on My Profile. * Required | | | |
| * Work Phone Number | * Work Email 🚯 | | |
| 8888888888 | claude11@claude11.com | - | |
| | | | |
| | Sa | ive | Cancel |
| | | _ | Figure 2 |





How do I change my organization contact information for a Principal Investigator role?

- Locate the organization and click **"Edit"** in the "Action" column located on the right side of Requested Roles table. (Figure 1 on previous page)
- <u>Users who have an affiliated Principal Investigator role</u> will see the screen depicted in Figure 3 and can edit their contact details, degree information, and work 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)

| Your contact information for Account information is locate | | | | |
|---|---------------------|---------------------|---------------------------|--|
| Account information is locate | ed on My Profile | | | |
| Your Contact Details | | | | |
| * Work Phone Number | | * Work Email () | | |
| 7039840341 | | test_user2@te | ester.com | |
| | | | | |
| Your Degree Information | tion | | | |
| * Degree Type | | * Degree Year | | |
| Master of Information Sys | stems 💌 | 2008 | | |
| Your Work Address * Country | | | | |
| | | ▼ Street Address | (Line 2) | |
| * Country United States | | Street Address | (Line 2) | |
| * Country United States * Street Address | | | (Line 2) | |
| * Country United States * Street Address 10001 test dr. | | | (Line 2) | |
| * Country United States * Street Address 10001 test dr. | * State | | (Line 2) * Postal Code | |
| * Country United States * Street Address 10001 test dr. Department Name | * State Virginia | | | |
| * Country United States * Street Address 10001 test dr. Department Name * City | | | * Postal Code | |



Helpful Tips

- Each NSF account requires a primary email address and a work email address. (Figures 2 and 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), even 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.

| showing 1-5 of 34 《 < Prev 1 2 3 4 5 Next> |
|--|
| Organization Contact Type |
| Administrator |
| |



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

- <u>Prerequisites</u>: You must have either an approved Principal Investigator (PI) role with an organization or an Unaffiliated Principal Investigator role before you can designate a Primary Organization.
 - If you don't have a Principal Investigator role and would like to add one, <u>click here</u>.
- Open the "**View My Roles**" page and locate the Active Role(s) table. (Figure 5)
- Locate the organization where you have an approved PI role that you would like to set as your Primary Organization. (Figure 5)
- 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 5)
- Locate the Principal Investigator role. (Figure 5)
- Select the "**Primary Organization**" checkbox located to the right of the Date Added field. (Figure 5)
- Notice the green check mark and "PI Primary Organization" label under the organization name. (Figure 5)
- You now have set the organization as the Primary Organization. The Primary Organization is the default for your proposal submissions.

| Filte | er Results | | | | | | |
|-------|--|-----------|-----------------|--------------|-----------------|------|--|
| Acti | ive Role(s) | | | | | | |
| | Organization Name | <u> </u> | Work Phone | Work Er | mail | | Action |
| • | MOHOLLAND TRANSFER, IN View SAM Legal Business N (PI Primary Organization) | | (999) 999-9999 | gblock@ v | ĝassociates.nsi | f.go | Edit Your Contact Info See Org Contact(s) |
| | Role(s) | | | ¢ | Date Added | | ¢ |
| | Other Authorized User (OAU |) | | | 11/29/2021 | | |
| | Principal Investigator / co-Pri | ncipal In | vestigator (PI) | | 11/29/2021 | Prim | ary Organization 🖯 |
| | Administrator (Admin) | | | | 11/29/2021 | | |

Figure 5

🔆 Helpful Tips

- You can only have one Primary Organization.
- Only PIs need to select a Primary Organization.
- By default, the latest PI role added to your profile (including an Unaffiliated PI role) will become the Primary Organization



View My Users – Administrator Dashboard

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 Help Desk at 1-800-381-1532 or <u>rgov@nsf.gov</u>.

Version 1.6, Updated May 2nd, 2022



The View My Users page is a dashboard for the organization Administrator to view the organization's pending role requests and manage user tables. Via this dashboard, the Administrator is able to approve or disapprove role requests, add or remove current user roles, add current NSF users to the organization, invite users to create NSF accounts, and invite current users to update their profile 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 Primary Email Address or 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.

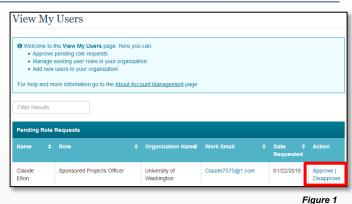
How do I approve or disapprove a role request from a user?

- 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?

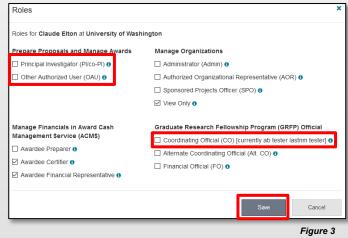
- View the "Manage User Roles" table. (Figure 2)
- Click "Manage Roles" located in the Action column on the right side of the table. (Figure 2)
- Select the appropriate role(s) to assign or remove from the user and click "Save." (Figure 3)
 - *Caution:* Deselecting all roles for a user will remove the user from the organization. (Figure 3)
 - If another user has the Coordinating Official (CO) role, the system will display the current CO's name. (Figure 3)
 - Note: There can only be one CO at an organization, and a CO cannot be removed from the organization unless the role is reassigned to another user.
 - 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.

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









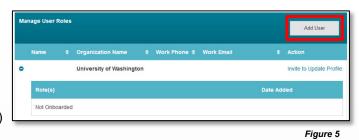
| Ma | nage User Role: | 5 | | | | | Add User | |
|----|---|---|-------------------------|---------------|------------|----------------|-----------------------------|--|
| | Name | ÷ | Organization Name | ¢ | Work Phone | ≎ Work Email 🗢 | Action | |
| • | Claude Elton | | IDAHO FRESH COOPERATIVE | INC | | c@c1.com | Manage Roles Remove User | |
| | Role(s) | | | | | Date Added | | |
| | Principal Investigator / co-Principal Investigator (PI) | | | A Info Needeo | | 01/18/2 | 018 | |

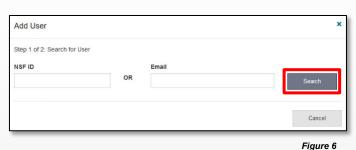


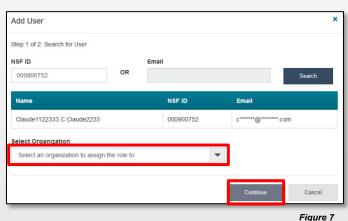
View My Users – Administrator Dashboard (continued)

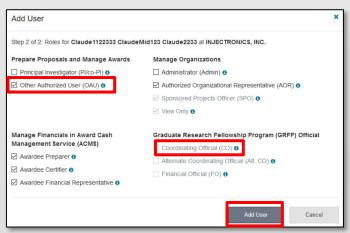
How do I add an existing NSF user as a new user at my organization?

- View the "Manage User Roles" table. (Figure 5)
- Click "Add User." (Figure 5)
- Enter an NSF ID or email address and click "Search". (Figure 6)
- Ensure the intended user name appears.
 - If you are an Administrator for multiple organizations, select an organization from the dropdown menu. (Figure 7)
- Click "Continue". (Figure 7)
- Select the appropriate role(s) to assign to the user. (Figure 8)
 - 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)
 - If a user does not have the required Principal Investigator Degree Information associated to their NSF account and/or does not have a work email address and a work phone number associated with the organization, an "Info Needed" icon will appear next their name and PI role. In addition, this icon will display on the user's View My Roles page. The user must input and save the required information by clicking on the "Edit Your Contact Info" link located in Active Roles table.
 - **Caution:** Deselecting all roles for a particular user will remove the user from the organization. (Figure 8)
 - If another user has the Coordinating Official (CO) role, the system will display that current CO's name. (Figure 8)









Helpful Tip

÷Ö:

To add a user to an organization or to add a 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 and updated their primary email address and phone number.



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 9)
- Click "Invite to Update Profile" located in the Action column.
 (Figure 9)
- An email will be sent to the user informing 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 9)
- Click "Add User". (Figure 9)
- Enter an email address and click "Search". (Figure 10)
- Ensure the correct email address appears. (Figure 10)
 - If you're an Administrator at multiple organizations, select an organization to invite the user. (Figure 10)
- Click "Invite to Register". (Figure 10)

How do I remove a user from my organization?

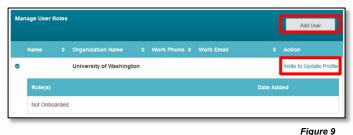
- Locate the "Manage User Roles" table. (Figure 11,12)
- Click "Remove User" located in the Action column. (Figure 11 shows a user who has migrated to the new account management system and Figure 12 shows a user who has not migrated to the new account management system)

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

- A user cannot be removed if they are the current 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's system.
- 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 13)

😳 Helpful Tip

Users must have an updated profile in order to be added to an organization and to be assigned roles. A user can only update their profile if they have successfully migrated their account and verified their primary email address and phone number.

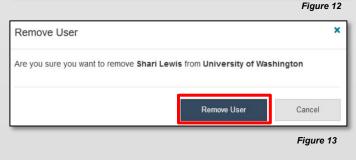


riguie 9

| Add User | | | |
|--|---------------------|---|-------------------------|
| Step 1 of 2: Search for User | | | |
| NSF ID | | Email | |
| | OR | 1@1.com | Search |
| search or invite the user to re | | email is either invalid or is not registe a email using the 'Invite to Register' | may retry the |
| search or invite the user to re | egister with NSF vi | a email using the 'Invite to Register' | nay retry the |
| search or invite the user to research or invite the user to research organization | egister with NSF vi | a email using the 'Invite to Register' | nay retry the |
| search or invite the user to research or invite the user to research or ganization | egister with NSF vi | a email using the 'Invite to Register' | nay retry the Cancel |









Migrate Your Existing NSF Account



Account Management

Migrate Your Existing NSF Account

To migrate your existing NSF account to NSF's new account management system, 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 Help 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 Charles A Bobrow-Strain (NSF ID: 000300002) 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, click the My Profile link in * Phone Number the success message. (Figure 3) **Helpful Tip** ÷O: Ne Figure 2 For instructions on how to make changes to your account profile information after your existing NSF account has been migrated to NSF's new account management system, please refer to the View and Edit My NSF Account Profile Information job aid. Verify Your Information Your account information has been verified and saved successfully To update your Account and Demographic Information, visit My Profile Account Information Primary Email Phone Number (703) 236-1083 x01134 francisquinn@gmail.com 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



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 reading, 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 My Desktop". (Figure 4)
- <u>Important Note:</u> Please be aware that the system will allow you to access My Desktop functionality for an allotted grace period. NSF has set the grace period initially to 30 days.

Multiple Accounts Found

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 & Procedures Guide (PAPPG).

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 your system access will cease.

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

Go To My Desktop

Figure 4

My grace period has expired. What do I do?

- You will receive a Verify Your Information pop-up. After reading 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 Help Desk to reinstate your access to NSF systems. (Figure 5)
- Click "Close". (Figure 5)

Multiple Accounts Found

 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.

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 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 have 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 Help Desk to address this issue. (Figure 6)
- Click "Close". (Figure 6)

