



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 [NSF ID Lookup](#) page to search for an existing NSF account.
- If you forgot your password for an established NSF account, [click here](#) 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 [Research.gov](#) homepage. [Click here](#) for detailed information on “My Profile” functions.
- If you do not have an existing NSF account, proceed to Step 2.



Figure 1

Account Registration

NSF Proposal & Award Policies & Procedures Guide (PAPPG) specifies that each individual user of NSF systems should not have more than one NSF ID (Chapter 1.6.4 NSF ID). [Registration on gov.nsf.gov](#)

*** Required Fields**

Profile
 First Name Middle Name/Initial Last Name Suffix

Alternate Name(s) (Nickname, maiden name, etc.)

* Primary Email For NSF account password recovery Confirm Primary Email
 Secondary Email Confirm Secondary Email

ORCID ID ORCID iD: 1234-1234-1234-1234 Phone Number Extension

NSF asks for demographic data relating to gender, ethnicity/race and disability to gauge whether our programs and other opportunities in science and technology are fairly reaching and benefiting everyone regardless of demographic category, and to ensure that those in under-represented groups have the same knowledge of and access to programs, meetings, resources, and other research and educational opportunities as everyone else. For more information, read this information on being represented.

Gender (Please select one)
 Male Female

Ethnicity (Please select one)
 Hispanic or Latino Not Hispanic or Latino

Race (Please select all that apply)
 American Indian or Alaska Native Asian Black or African American Native Hawaiian or Other Pacific Islander White Other (Please specify) Do not wish to provide

Disability (Please select one)
 Do not wish to provide Yes No Do not wish to provide

I'm not a robot I confirm that I am at least 13 years of age

Save & Preview

Step 2: Access the Account Registration page

- Open [Research.gov](#)
- 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)

Important Note: 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 [Research.gov](#) 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!

Figure 2

Preview Account Registration

Review your information for accuracy.

Prefix: Dr.

First Name: John

Middle Name/Initial:

Last Name: Doe

Suffix: Jr.

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

Race: Do not wish to provide

Ethnicity: Do not wish to provide

Disability: Do not wish to provide

Submit

Figure 3

Account Registration Confirmation

Your account has been successfully created.

An activation email was sent to: [Claude7575@t.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.

Figure 4

Step 4: Add a New Role

- Now that you have an NSF account, you can add roles to your account profile. [Click here](#) for detailed instructions.



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, [click here](#).
- 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, [click here](#).
- 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, [click here](#).

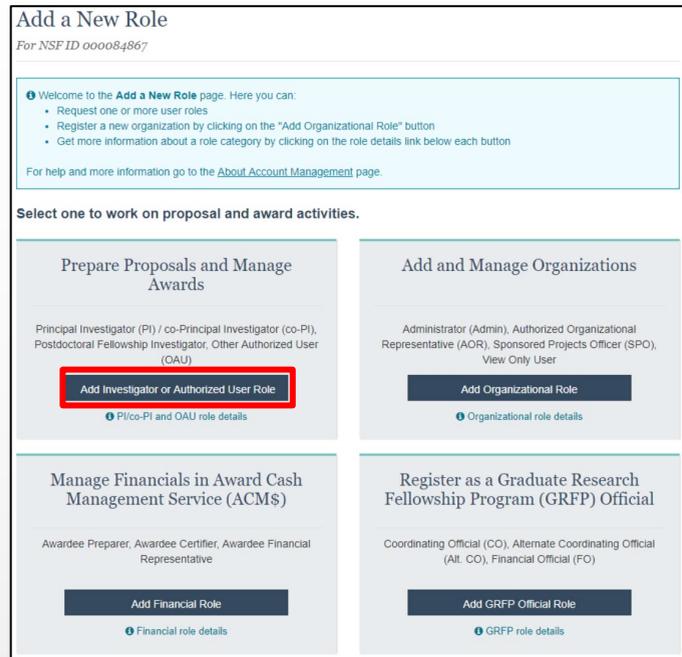


Figure 1

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

- Click “**Sign In**” located at the top right of [Research.gov](#) page.
- Enter your 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)

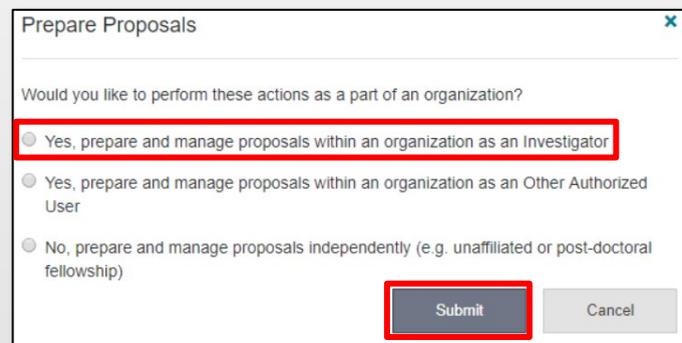


Figure 2

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**”.

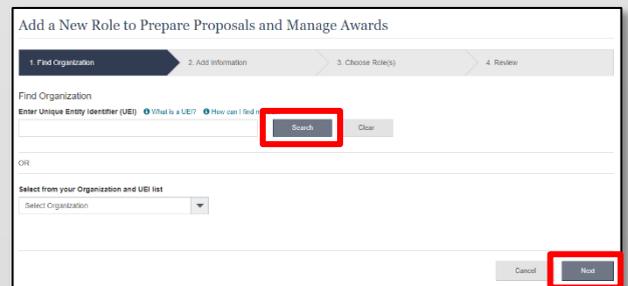


Figure 3

Note: For more information about the SAM UEIs, please [click here](#) 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)

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.

Figure 4

Figure 5

Figure 6

Organization Contact(s)	Organization Contact Type
Carolo, Ian	Administrator
BRIGGS, VICTOR B	SAM POC
HALE-MORRIS, SHIRLEE K	SAM POC
MORRIS, SHIRLEE K	SAM POC

Figure 7



Navigating the Account Management Links



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 [Research.gov](https://www.research.gov) and clicking on the “My Profile” link in the top right.

Access the left navigation bar in Account Management

- Open [Research.gov](https://www.research.gov)
- 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)



Figure 1



Figure 2

Important Note: NSF enabled [Login.gov](https://www.login.gov) to sign in to [Research.gov](https://www.research.gov) in January 2022. Use of [Login.gov](https://www.login.gov) to sign in to [Research.gov](https://www.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](https://www.research.gov). A user who has an NSF account linked to their organizational credentials or [Login.gov](https://www.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](https://www.research.gov). This guide provides instructions for only the “**NSF Account**” sign in option.



Figure 3

Where do the left navigation bar links take me?

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

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 [Research.gov](https://www.research.gov)
- 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)

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

Step 2: Edit your Contact Information

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

Important Note: 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.



Figure 1



Figure 2



Figure 3

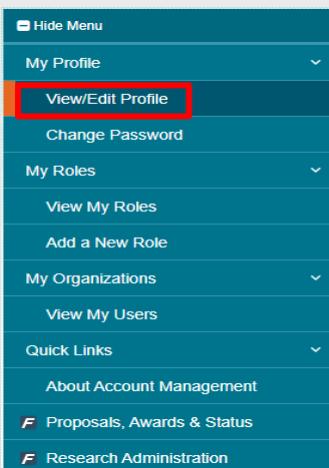


Figure 4

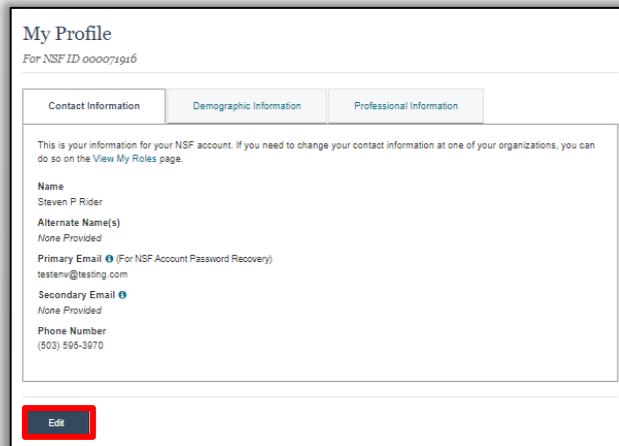


Figure 5

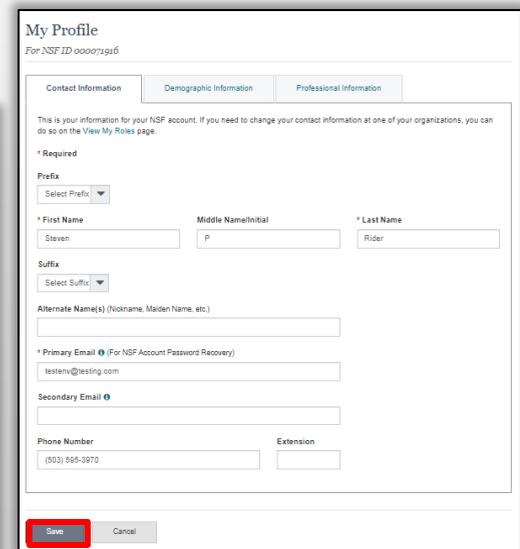


Figure 6



Helpful Tip

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.



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 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)

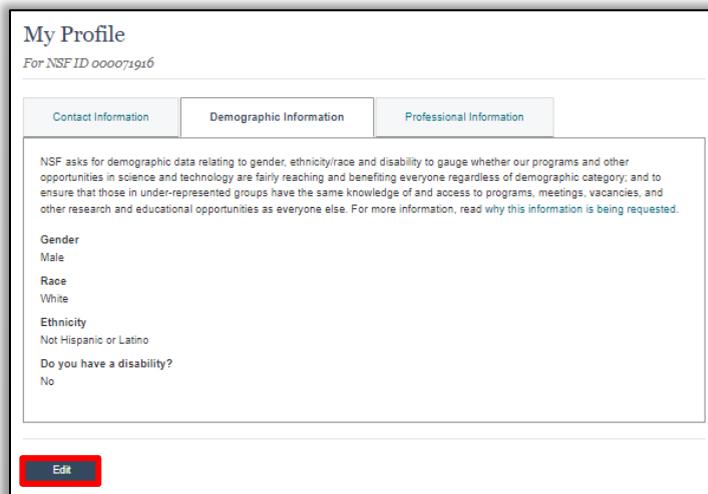


Figure 7

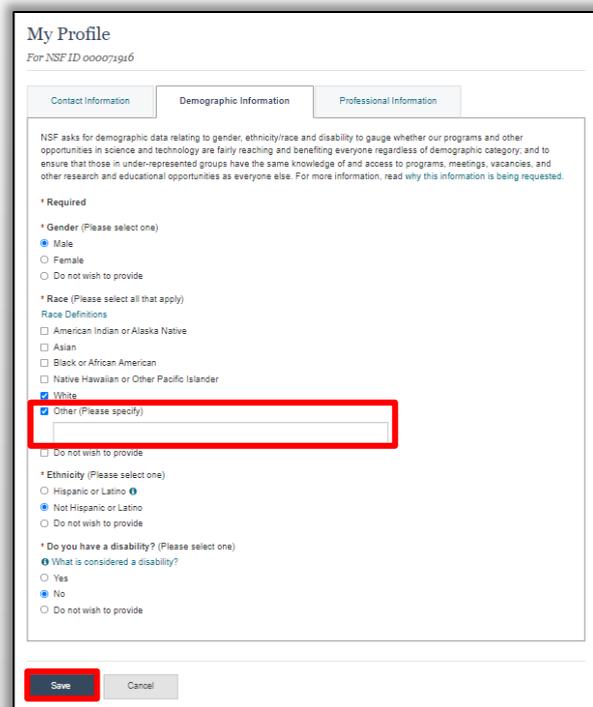


Figure 8



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)

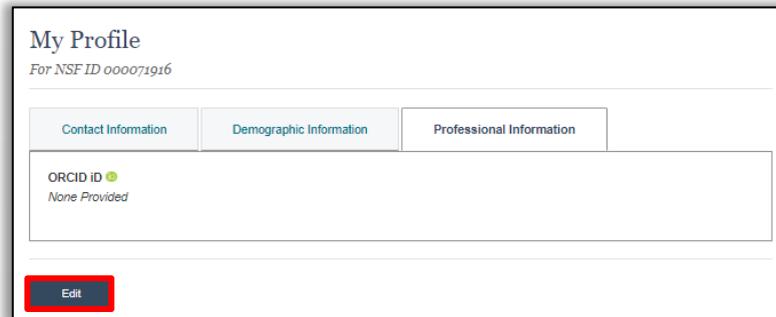


Figure 9

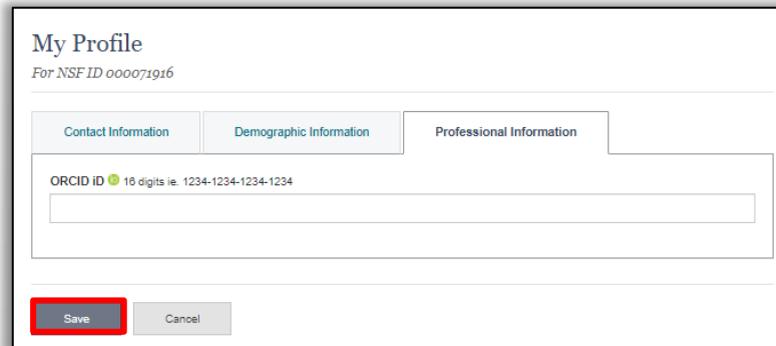


Figure 10



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)

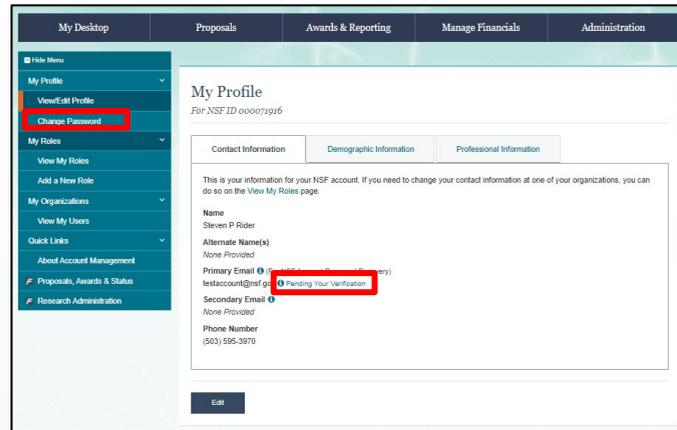


Figure 6

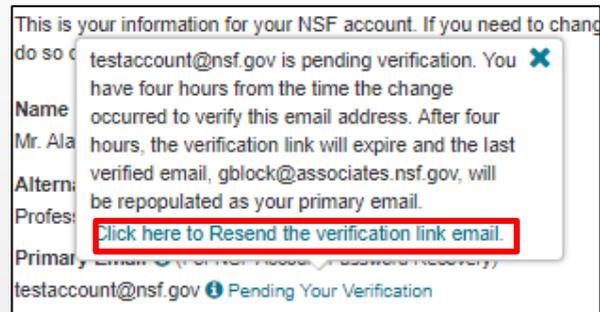


Figure 7

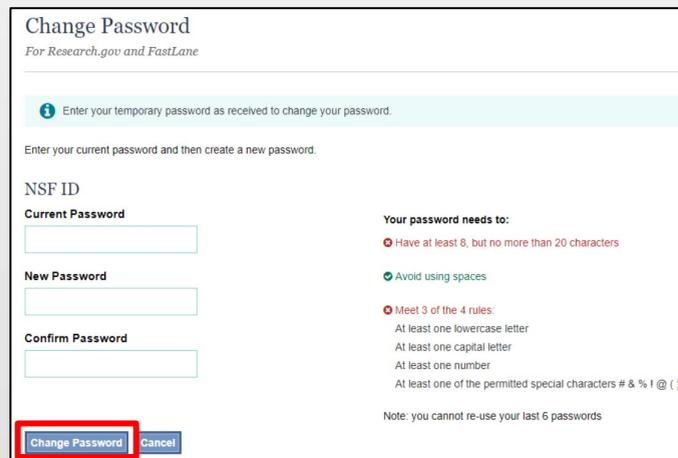


Figure 8



Helpful Tip

Passwords are valid for 365 days before required renewal.

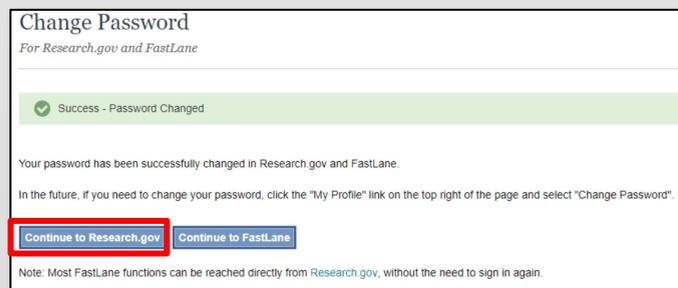


Figure 9



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 <https://www.sam.gov> 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 [Research.gov](https://www.research.gov)
- 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).
 - **Note:** 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 <https://sam.gov>
 - Note that completion of the SAM registration process may take up to two weeks.

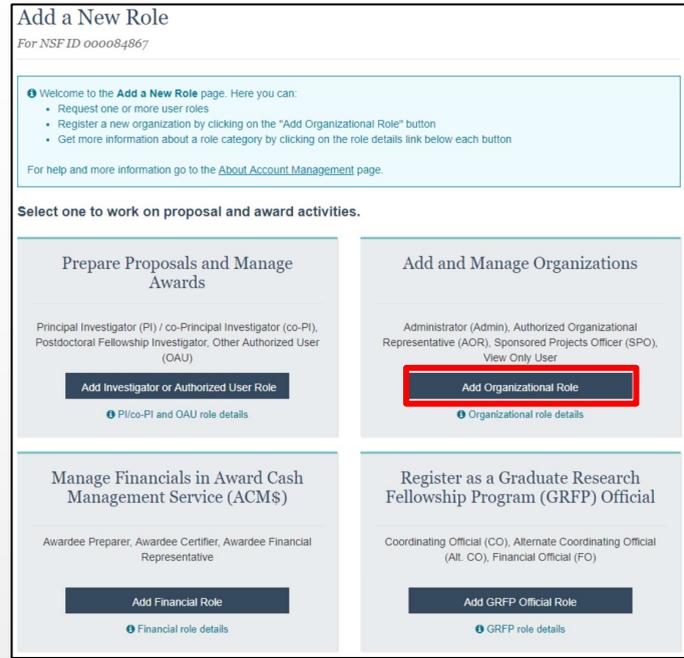


Figure 1

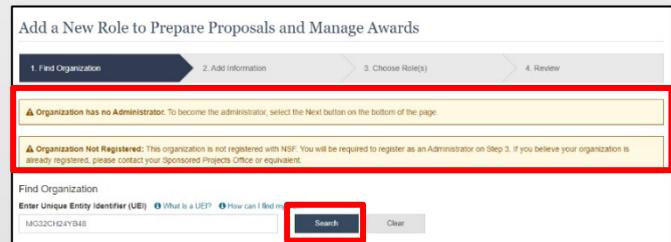


Figure 2



Helpful Tip

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)

Add a New Role to Add and Manage Organizations

1. Find Organization ✓ 2. Add Information 3. Choose Role(s) 4. Review

Add Information
The contact information will be used for all communications when performing in approved roles for this organization

* Required

Your Contact Details

* Work Phone Number * Work Email Select Work Email

Organization Details

* Organization Short Name * Organization Type Select Organization Type * Time Zone Select Time Zone

* Organization Phone Number Organization Fax Number * Organization Email

Cancel Previous **Next**

Figure 3

Add a New Role to Add and Manage Organizations

1. Find Organization ✓ 2. Add Information ✓ 3. Choose Role(s) 4. Review

You will be registered for the following role:

* Administrator (Manage Roles)

Cancel Previous **Next**

Figure 4

Add a New Role to Add and Manage Organizations

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 UNIVERSITY OF NEW YORK, THE
Role(s): Administrator
Work Email: gblack@associates.nsf.gov
Work Phone Number: (123) 867-5309

Cancel Previous **Submit**

Figure 5

Add a New Role to Add and Manage Organizations

⚠ Only persons with the Authorized Organizational Representative (AOR) role can submit proposals to NSF on behalf of their organization. This role must be assigned to one or more persons in your organization before you can finalize a proposal submission. The AOR role is never assigned to any person by default. You can request the AOR role via the [Add a New Role](#) page.

✔ Success - You have been assigned the Administrator Role. You can review your role on the [View My Roles](#) page.

Organization Contact(s)	Organization Contact Type
CHASTEEN, MARK	SAM POC

[Continue to My Profile](#)

[Add Additional Roles](#)

Figure 6



Add a New Role



To work on proposal and award activities on National Science Foundation (NSF) systems, a user must have an organization-approved role at an organization registered with NSF. To request a role from your organization, you must sign in to [Research.gov](https://www.research.gov) 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.

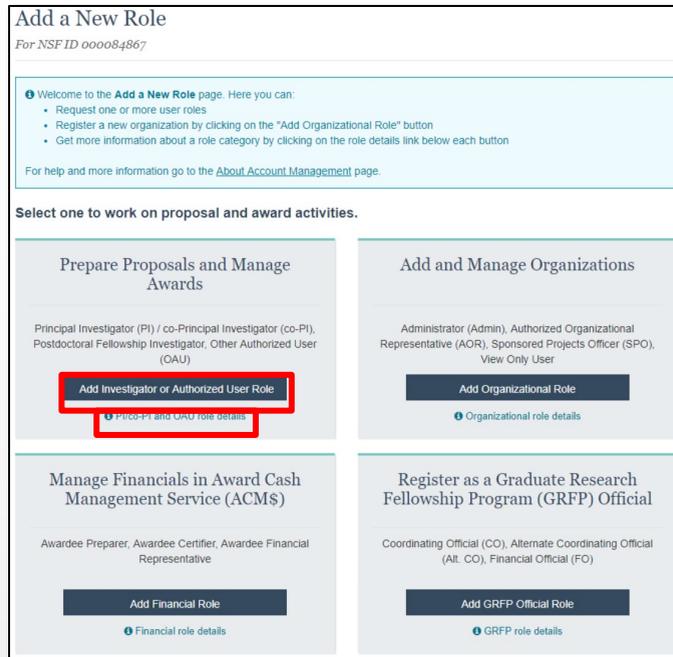


Figure 1

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 by category.

If you need this role(s)	To perform these functions	Select this “Add Role” Button
<ul style="list-style-type: none"> Principal Investigator (PI) Co-Principal Investigator (co-PI) Unaffiliated Fellowship Principal Investigator 	<ul style="list-style-type: none"> Prepare proposals Manage awards 	Add Investigator or Authorized User Role
<ul style="list-style-type: none"> Administrator Sponsored Projects Officer (SPO) Authorized Organization Representative (AOR) View Only 	<ul style="list-style-type: none"> Add a new organization Approve/disapprove roles Assign user roles Add/remove users 	Add Organizational Role
<ul style="list-style-type: none"> Awardee Preparer Awardee Certifier Awardee Financial Representative 	<ul style="list-style-type: none"> Prepare and manage financials in Award Cash Management Service (ACM\$) 	Add Financial Role
<ul style="list-style-type: none"> Graduate Research Fellowship Program (GRFP) Coordinating Official (CO) GRFP Alternate Coordinating Official (Alt. CO) GRFP Financial Official (FO) 	<ul style="list-style-type: none"> Manage GRFP functions 	Add GRFP Official Role
<ul style="list-style-type: none"> Other Authorized User (OAU) 	<ul style="list-style-type: none"> 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 [click here](#) or contact your Sponsored Projects Office (SPO).

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

Figure 2

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: [Add a New Role – Principal Investigator and Add a New Role – Unaffiliated Principal Investigator](#).
- 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.

Figure 3



Helpful Tips

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 **at a particular organization**. 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.

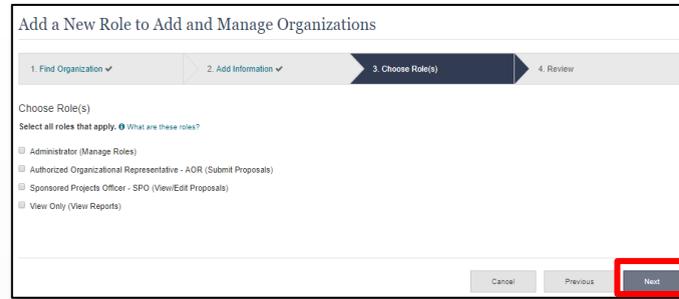


Figure 4

Step 4: Review and Submit

- Review your information for accuracy and click **“Submit”**. (Figure 5)

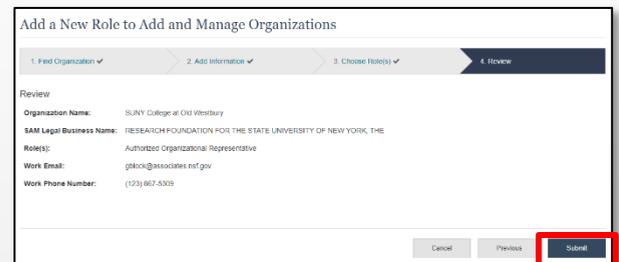


Figure 5

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)!



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



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 [Research.gov](https://www.research.gov) 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)

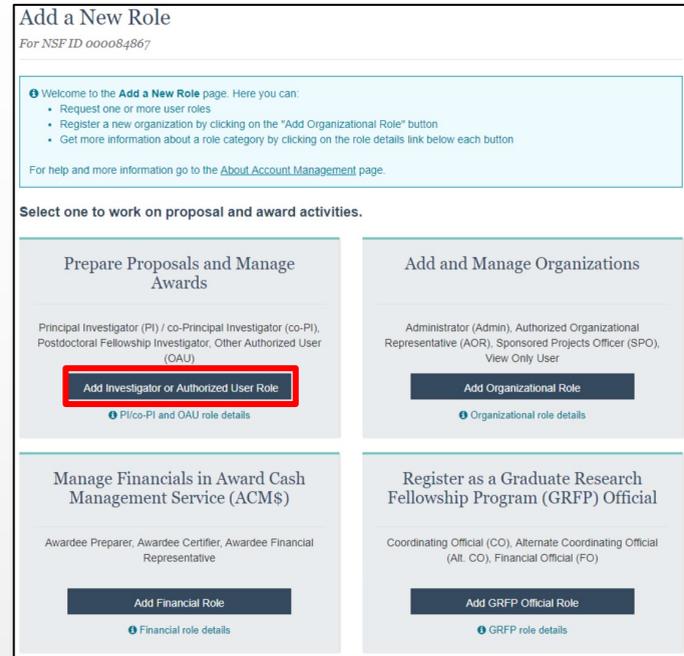


Figure 1

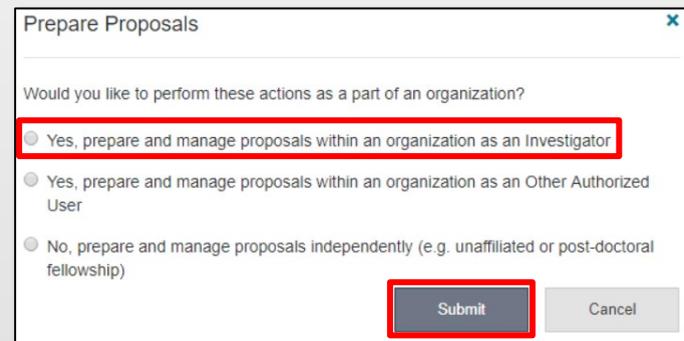


Figure 2

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 organization-approved 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 [click here](#) or contact your Sponsored Projects Office (SPO).

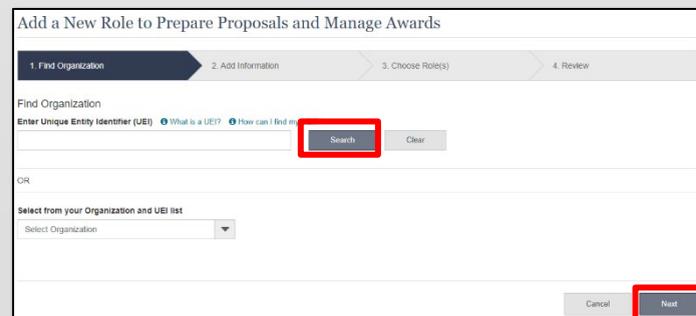


Figure 3



Step 2: Add Information

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

Step 3: Choose Role(s)

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

Step 4: Review and Submit

- Review your information for accuracy and click “Submit”. (Figure 6)

Success

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

Add a New Role to Prepare Proposals and Manage Awards

1. Find Organization | 2. Add Information | 3. Choose Role(s) | 4. Review

Existing role information: You currently have role contact information for the selected organization. All roles share the same contact information within the same organization. Please review the information for accuracy. If you choose to update the contact information, all other roles for this organization will be updated with the new information.

Add Information
The contact information will be used for all communications when performing in approved roles for this organization.

*** Required**

Your Contact Details

* Work Phone Number: (222) 222-2222 | * Work Email: adiyeh_all@tah.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 Name

* City | * State: Select State | * Postal Code

Cancel Previous **Next**

Figure 4

Add a New Role to Prepare Proposals and Manage Awards

1. Find Organization | 2. Add Information | 3. Choose Role(s) | 4. Review

Choose Role(s)
You will be registered for the following role: What is this role?

Principal Investigator (PI/Co-PI)

Cancel Previous **Next**

Figure 5

Add a New Role to Prepare Proposals and Manage Awards

1. Find Organization | 2. Add Information | 3. Choose Role(s) | 4. Review

Review

Your Contact Details
Organization Name: SUNY College at Old Westbury
SAM Legal Business Name: RESEARCH FOUNDATION FOR THE STATE UNIVERSITY OF NEW YORK, THE
Role: Principal Investigator (PI/Co-PI)
Work Email: glbeck@associates.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: Arlington
State: Idaho
Postal Code: 54213

Cancel Previous **Submit**

Figure 6

Add a New Role to Prepare Proposals and Manage Awards

Success - your request has been forwarded to the organization contact(s) below. Check the status of this request on the [View My Roles](#) page.

Organization Contact(s)	Organization Contact Type
Adiyeh, All	Administrator
Collum, Kimberly	Administrator
GLENN, CHANCE GLENN M	SAM POC
JONES, LATONIA	SAM POC
O'BEMBE, BARATUNDE	SAM POC

Continue to My Profile >
Add Additional Roles >

Figure 7



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 – 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 [Research.gov](https://www.research.gov) 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

Figure 2



Helpful Tips

- 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.

Figure 3



Step 2: Review

- Review your information for accuracy and click **“Submit”**. (Figure 4)

Unaffiliated PI

Review your information for accuracy.

Organization Name: Elton, Claude
Role: Unaffiliated Principal Investigator

Your Contact Details
Work Phone Number: 2342425555
Work Email: Claude7575@t.com

Your Degree Information
Degree Type: Bachelor of Agriculture
Degree Year: 2009

Your Work Address
Country: American Samoa
Time Zone: Pacific/Pago_Pago
Street Address: 1
Street Address (Line 2): 2
City: 3
Postal Code: 444444

Figure 4

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 proposals.

[Continue to My Profile >](#)

[Add Additional Roles >](#)

Figure 5



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)



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 [Research.gov](https://www.research.gov)
- 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.

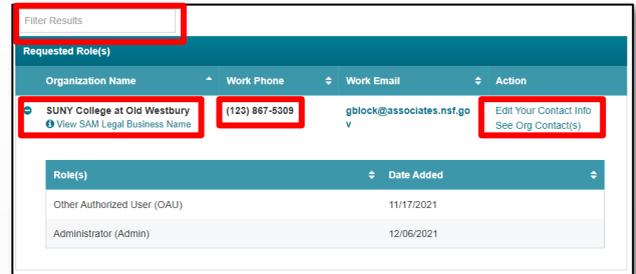


Figure 1

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)
- Users who have non-Principal Investigator roles will see the screen depicted in Figure 2 and can edit their work phone number and work email address. Then click **“Save”**. (Figure 2)

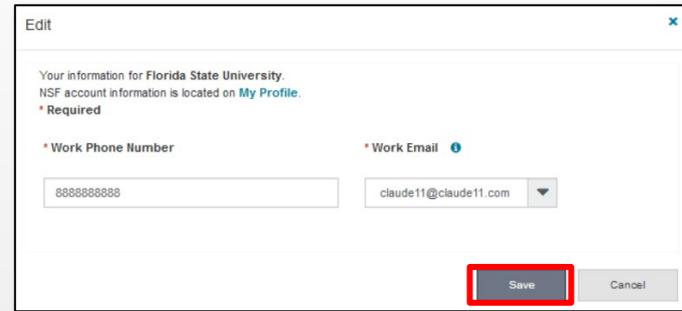


Figure 2



Helpful Tips

- The Requested Role(s) table depicted in Figure 1 can be filtered, sorted, and expanded:
 - Filter on any information contained in the table by typing into the Filter Results box in the upper left corner.
 - Sort data in ascending or descending order by clicking the arrows located next to the column names.
 - Expand and collapse the organization name to display and hide roles.
- 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 **at a particular organization**. This email address is used for role request and approval notifications as well as for proposal and award related notifications.



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)
- Users who have an affiliated Principal Investigator role 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)

Edit

Your contact information for University of Washington
Account information is located on My Profile

Your Contact Details

* Work Phone Number: 7039840341

* Work Email: test_user2@tester.com

Your Degree Information

* Degree Type: Master of Information Systems

* Degree Year: 2008

Your Work Address

* Country: United States

* Street Address: 10001 test dr.

Street Address (Line 2): line 2

Department Name: [Empty]

* City: herndon

* State: Virginia

* Postal Code: 20171

Buttons: Cancel, Save

Figure 3



Helpful Tips

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

Organization Contact(s)

Show 5

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 [Research.gov](https://www.research.gov)
- 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.

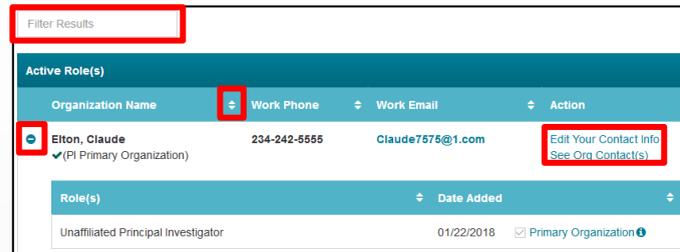


Figure 1

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)
- Users who have non-Principal Investigator roles will see the screen depicted in Figure 2 and can edit their work phone number and work email address. Then click “**Save**”. (Figure 2)

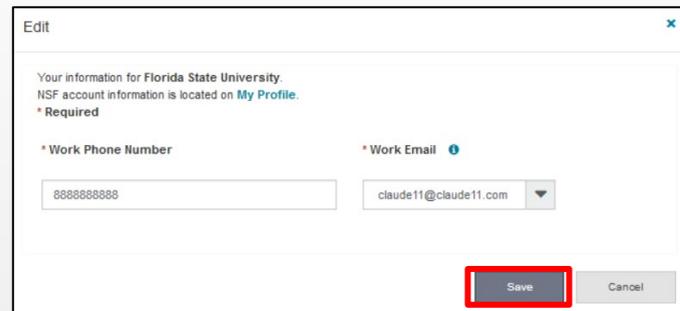


Figure 2



Helpful Tips

- The Requested Role(s) table depicted in Figure 1 can be filtered, sorted, and expanded:
 - Filter on any information contained in the table by typing into the Filter Results box in the upper left corner.
 - Sort data in ascending or descending order by clicking the arrows located next to the column names.
 - Expand and collapse the organization name to display and hide roles.
- 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 **at a particular organization**. This email address is used for role request and approval notifications as well as for proposal and award related notifications.



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)
- Users who have an affiliated Principal Investigator role 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)

Edit

Your contact information for University of Washington
Account information is located on My Profile

Your Contact Details

* Work Phone Number: 7039840341

* Work Email: test_user2@tester.com

Your Degree Information

* Degree Type: Master of Information Systems

* Degree Year: 2008

Your Work Address

* Country: United States

* Street Address: 10001 test dr.

Street Address (Line 2): line 2

Department Name:

* City: herndon

* State: Virginia

* Postal Code: 20171

Buttons: Cancel, Save

Figure 3



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 **at a particular organization**. This email address is used for role request and approval notifications as well as for proposal and award related notifications.

Organization Contact(s)

Show 5

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



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

- **Prerequisites:** 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, [click here](#).
- 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.

Filter Results			
Active Role(s)			
Organization Name	Work Phone	Work Email	Action
MOHOLLAND TRANSFER, INC. View SAM Legal Business Name ✓(PI Primary Organization)	(999) 999-9999	gblock@associates.nsf.gov	Edit Your Contact Info See Org Contact(s)
Role(s)		Date Added	
Other Authorized User (OAU)		11/29/2021	
Principal Investigator / co-Principal Investigator (PI)		11/29/2021	<input checked="" type="checkbox"/> Primary 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



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 [Research.gov](https://www.research.gov)
- 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)

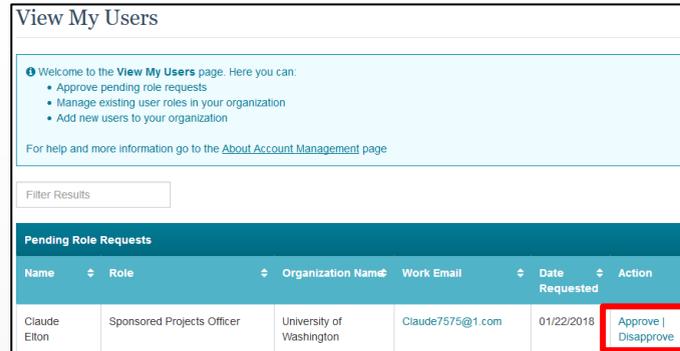


Figure 1

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.



Figure 2

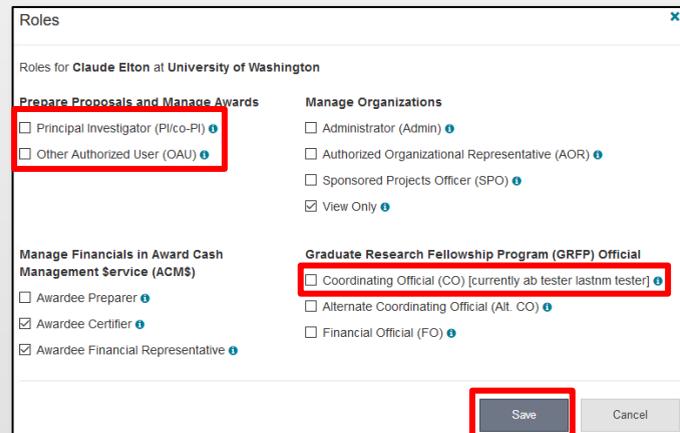


Figure 3

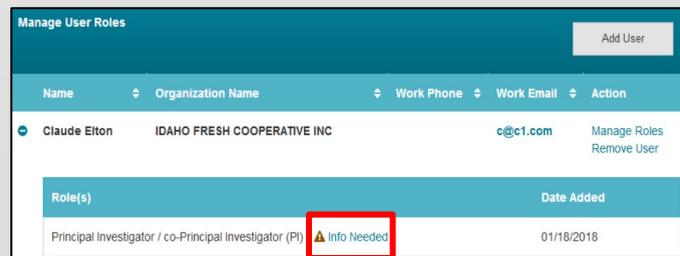


Figure 4

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



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)

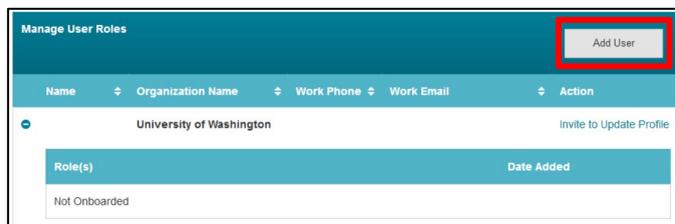


Figure 5



Figure 6

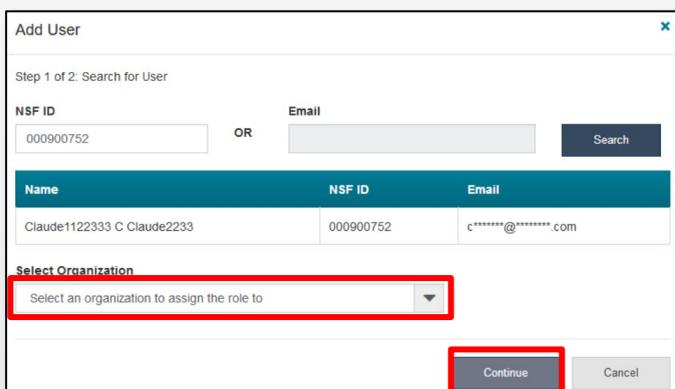


Figure 7

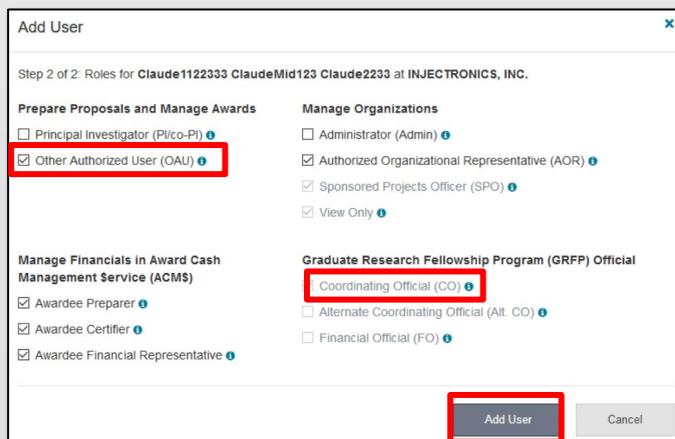


Figure 8



Helpful Tip

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.



Figure 9

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)

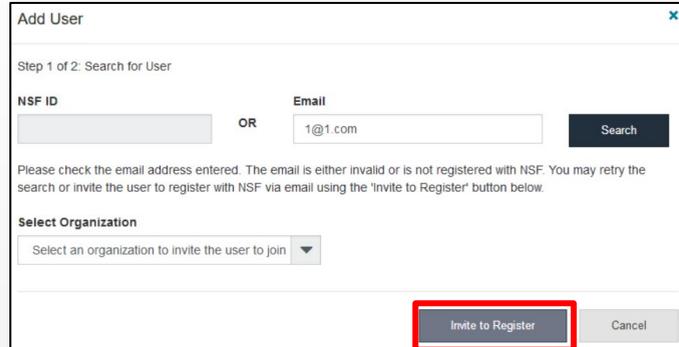


Figure 10

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)

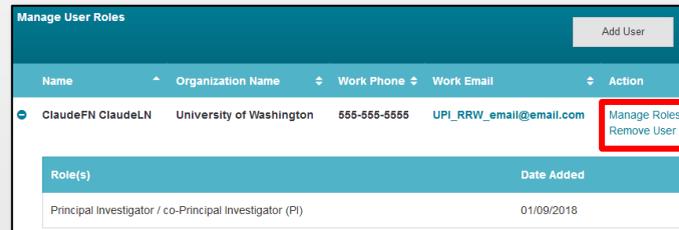


Figure 11

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)



Figure 12

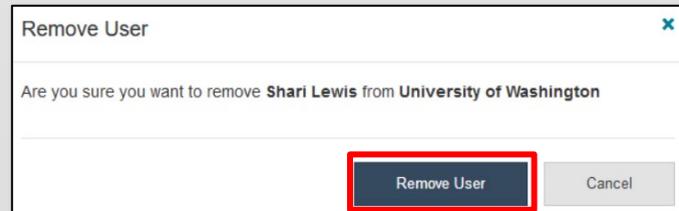


Figure 13



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.



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 so that my account can be migrated?

- You will receive a Verify Your Information pop-up. After you have read it, click “Next”. (Figure 1)
- Select an email address, enter your 10-digit phone number, and click “Next”. (Figure 2)
- Note the information that has been saved as your account's primary email address and phone number. (Figure 3)
- Click “Go to View My Roles” and you will be directed to the View My Roles page to view current active roles for your organization(s). (Figure 3)

Notes:

- Demographic information that had been entered in FastLane will migrate to Research.gov along with the rest of your account and profile information as part of the migration process
- Upon completing the verification process, you will see a green success message at the top of the screen. To View/Edit your account and demographic information, click the My Profile link in the success message. (Figure 3)



Helpful Tip

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.

Figure 1

Figure 2

Figure 3



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)
- **Important Note:** 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.

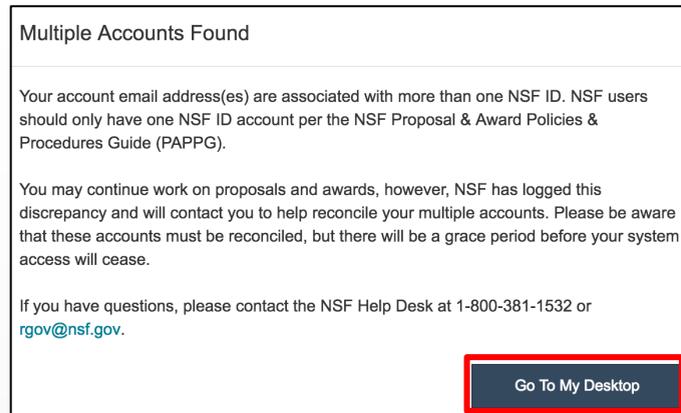


Figure 4

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)

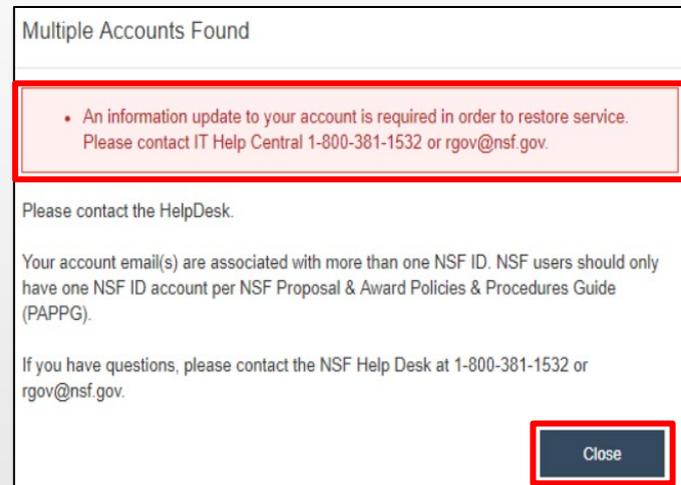


Figure 5

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)

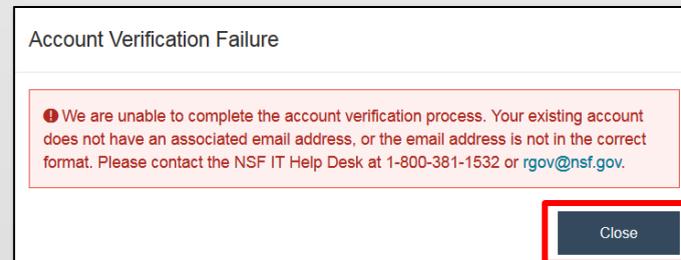


Figure 6