



Account Management Guide



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Register for a New NSF Account



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

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

- Access the [Forgot NSF ID](#) page to search for an existing NSF account.
- If you forgot your password for an established NSF account, use [Forgot Password](#) 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 after signing in. See [View and Edit My NSF Account Profile Information](#) for detailed information on “**My Profile**” functions.
- If you do not have an existing NSF account, proceed to Step 2.



Figure 1

Step 2: Access the Account Registration page

- Open [Research.gov](#)
- Click “**Register**” located at the top of the screen. (Figure 1)

Figure 2

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, especially if you were to ever change organizations.

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

Figure 4



Step 4: Add a new organization role

- Now that you have an NSF account, you can add organizational roles to your account profile. For detailed instructions, see [Add a New Organizational Role](#).

Important Note: Reviewers, GRFP Applicants, GRFP Fellows, and fellowship reference letter writers will not add an organizational role. GRFP-specific Account Management training resources including guides and FAQs are available on the [GRFP Account Management page](#).



Working at Multiple Organizations or Moving to Another Organization



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

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

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

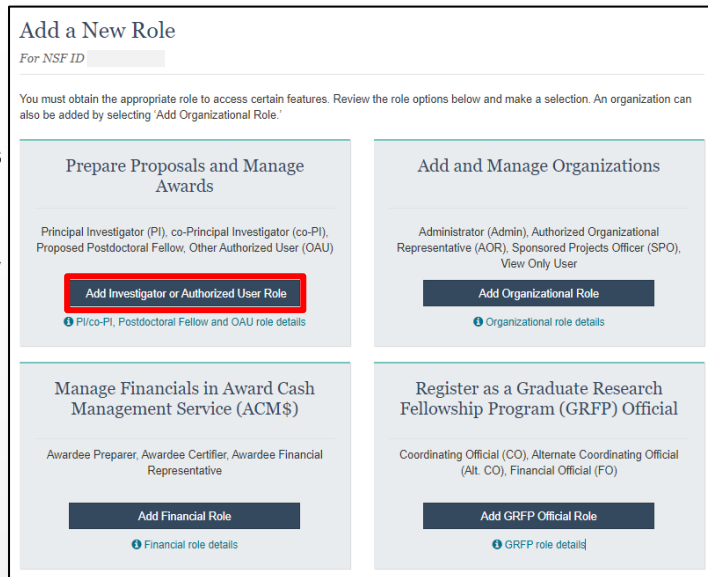


Figure 1

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

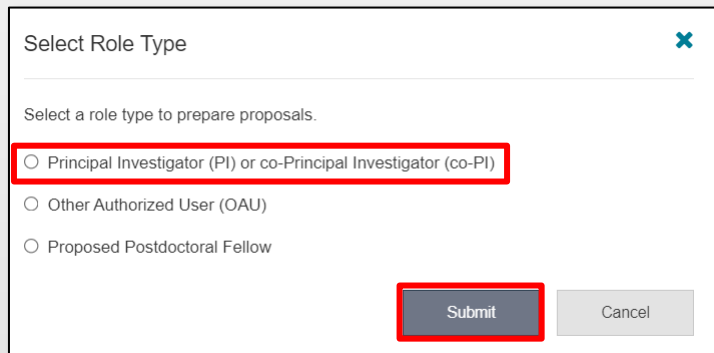


Figure 2

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 can select the SAM UEI associated with your existing organization from the drop-down menu.
- Verify the correct organization is displayed and click “Next”.

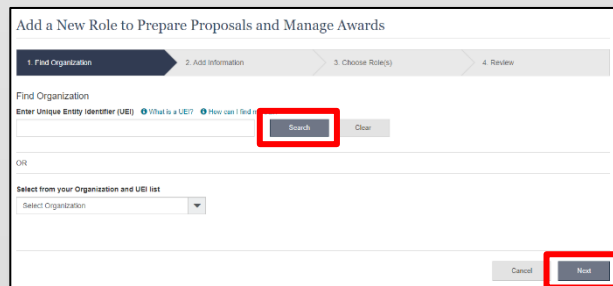


Figure 3

Note: For more information about SAM UEIs, please visit [SAM.gov](#) 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!

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



Helpful Tips

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

Figure 4

Figure 5

Figure 6

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

Figure 7



Navigating the Account Management Links



The Account Management System includes screens for Administrators to manage user and organization information and screens for users to self-manage their organizational roles and profile information. Access these screens and the functionality by signing into [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 credentials (e.g., NSF ID and password) and click “**Sign In.**” (Figure 2)
- Click on “**My Profile**” located at the top right of the screen. (Figure 3)



Figure 1

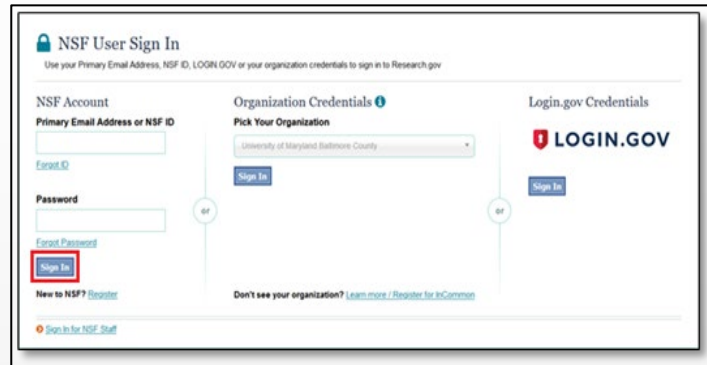


Figure 2



Figure 3

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

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 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 have an organization-approved Administrator role for an organization registered with NSF.</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



View and Edit My NSF Account Profile Information



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

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

Step 1: Access the View/Edit My Profile page

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

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)



Figure 1

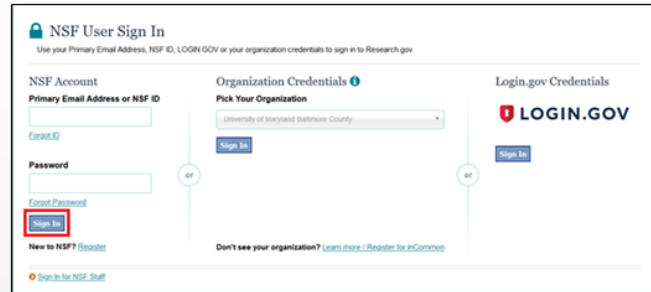


Figure 2



Figure 3

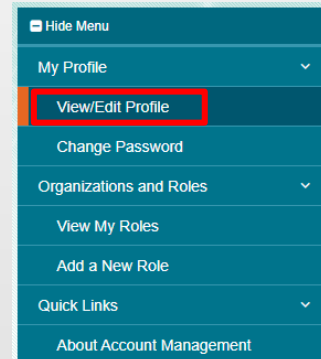


Figure 4



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 Notes:

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

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.



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

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

Important Notes:

- **Submission of the requested demographic information is required for PI/co-PIs, GRFP Fellows, and reviewers. Until responses to all demographic questions are provided, the “Save” button will be disabled.** (Figure 8)
- **The “Other” option for the race question will open an optional free text field for entry.** (Figure 8)
- **Users who are not PI/co-PIs, GRFP Fellows, or reviewers will not have the Demographic Information tab within “My Profile.”** (Figure 9)

My Profile
For NSF ID [redacted]

Contact Information | **Demographic Information** | Academic/Professional Information

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, vacancies, and other research and educational opportunities as everyone else. For more information, read the [Privacy Act Statement](#).

Gender
Unspecified, or another gender identity

Race
White

Ethnicity
Not Hispanic or Latino

Do you have a disability?
No

Edit

Figure 7

My Profile
For NSF ID [redacted]

Contact Information | **Demographic Information** | Academic/Professional Information

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, vacancies, and other research and educational opportunities as everyone else. For more information, read the [Privacy Act Statement](#).

*** Required**

*** Gender (Please select one)**

Male

Female

Unspecified, or another gender identity

Do not wish to provide

*** Ethnicity (Please select one)**

Hispanic or Latino

Not Hispanic or Latino

Do not wish to provide

*** Race (Please select all that apply)**

Race Definitions

American Indian or Alaska Native

Asian

Black or African American

Native Hawaiian or Other Pacific Islander

White

Other (Please specify) [text field]

Do not wish to provide

*** Do you have a disability? (Please select one)**

What is considered a disability?

Yes

No

Do not wish to provide

Save | Cancel

Figure 8

My Profile
For NSF ID [redacted]

Contact Information | **Academic/Professional Information**

Name
TestFel INTTEST

Alternate Name(s)
None Provided

Primary Email Address ⓘ For NSF Notifications and Password Recovery
testest@gmail.com

Secondary Email Address ⓘ Alternative Account Verification
None Provided

Phone Number
None Provided

Edit

Figure 9



Step 4: Edit your Academic/Professional Information

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

Important Notes:

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

My Profile
For NSF ID [redacted]

Contact Information | Demographic Information | **Academic/Professional Information**

Update your profile information here. If you have a role at an organization, you can update your organization-specific information on [View My Roles](#)

NSF asks for professional information to enable program officials to manage reviewer selection, as well as related merit review functions. For more information, read the [Privacy Act Statement](#).

Highest Degree
ScD - Doctor of Science (1989)

Area(s) of Expertise
Zoology
Agricultural Engineering

ORCID ID
None Provided

Websites
Websites may be used for NSF selection of reviewers.
test.org

Edit

Figure 10

My Profile
For NSF ID [redacted]

Contact Information | Demographic Information | **Academic/Professional Information**

Update your profile information here. If you have a role at an organization, you can update your organization-specific information on [View My Roles](#)

NSF asks for professional information to enable program officials to manage reviewer selection, as well as related merit review functions. For more information, read the [Privacy Act Statement](#).

* Required

Degree

* Highest Degree * Year Completed
ScD - Doctor of Science 1989

Area(s) of Expertise

Select up to five items that best describe your area(s) of expertise.
If your area of expertise is not listed, you may add your own by selecting "Other (Please specify)."

* Area(s) of Expertise Add up to five

1. Zoology

2. Agricultural Engineering

+ Add Area of Expertise

Professional References

ORCID ID 16-digits i.e., 1234-1234-1234-1234
[input field]

Websites (e.g., Organizational faculty, staff profile, or professional website, LinkedIn, Google Scholar)
Websites may be used for NSF selection of reviewers.
test.org
[input field]

+ Add Website

Save Cancel

Figure 11

Area(s) of Expertise

Select up to five items that best describe your area(s) of expertise.
If your area of expertise is not listed, you may add your own by selecting "Other (Please specify)."

* Area(s) of Expertise Add up to five * Other (Please specify)

1. Other (Please specify) Marine Biology

+ Add Area of Expertise

Figure 12



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

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

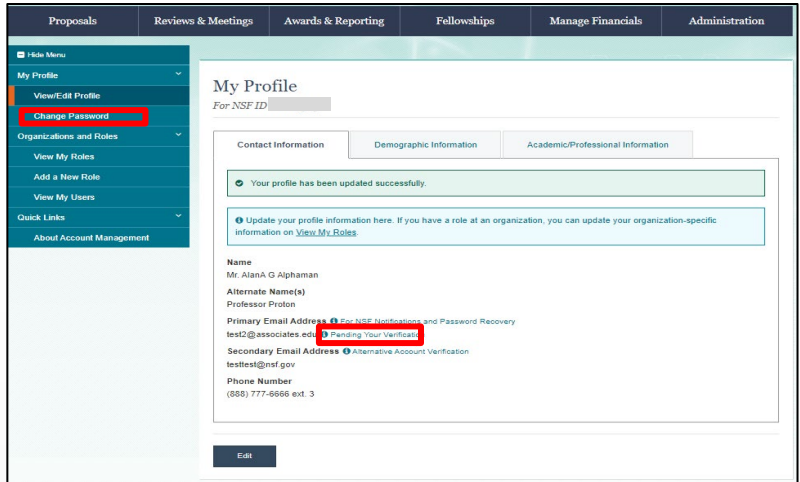


Figure 13

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 in the [View and Edit My NSF Account Profile Information](#) job aid)

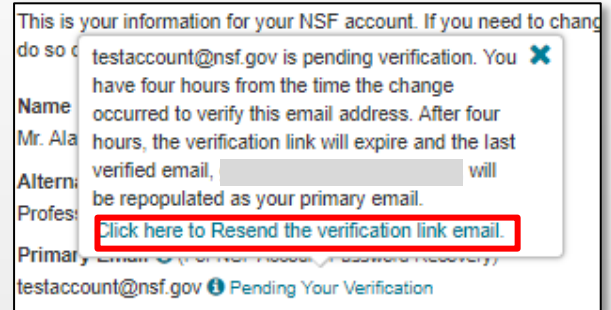


Figure 14



How do I change my password?

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

Figure 15

Figure 16



Register a New Organization



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

Follow the step-by-step process below to register a new organization with NSF. There is also a [Register a New Organization with NSF](#) video tutorial.

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

- Open [Research.gov](https://research.gov)
- Click **“Sign In”** located at the top right of the screen.
- Enter your credentials (e.g., NSF ID and password) and click **“Sign In.”**
- Click **“My Profile”** located at the top right of the screen.
- Click **“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 your organization is already registered with NSF and has a new UEI, please do not register the organization again. Instead, please contact the NSF IT Service Desk at 1-800-381-1532 or rgov@nsf.gov to update the organization’s UEI. (Figure 2)
 - If you need help registering in the System for Award Management (SAM), go to [SAM.gov](https://sam.gov).
 - Note that completion of the SAM registration process may take up to one month. Please check [SAM.gov](https://sam.gov) for information about any delays of SAM.gov registrations, validations and UEI issuance.

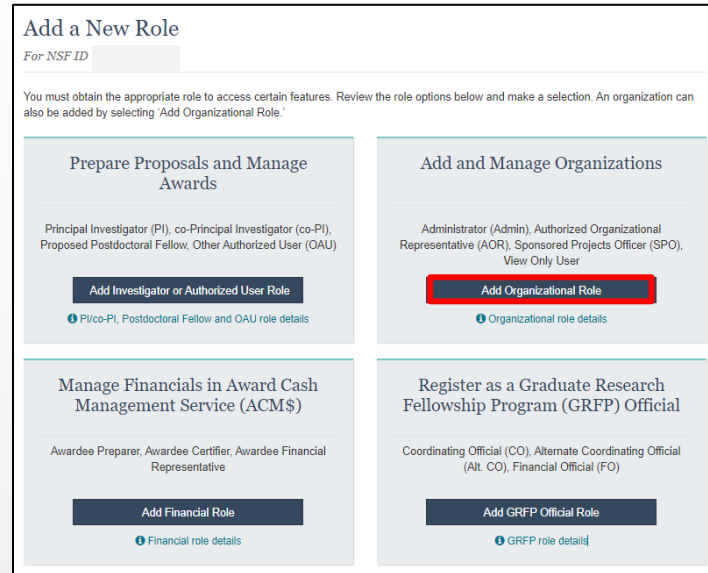


Figure 1

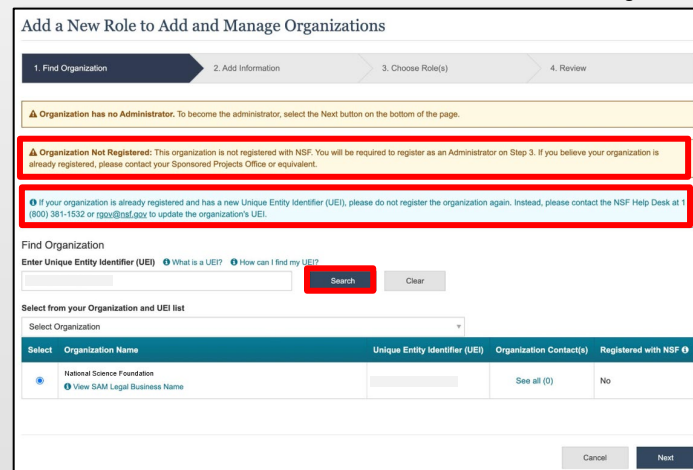


Figure 2

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.



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

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

Add a New Role to Add and Manage Organizations

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

Add Information

Your Contact Details

* Work Phone Number * Work Email For Admin Requests
Select Work Email

Award and Organization Contact Information

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

* Organization Phone Number Organization Fax Number * Organization Email For Award Notices

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

Your Contact Details

Organization Name: National Science Foundation
SAM Legal Business Name: National Science Foundation
Role: Administrator
Work Email: nsftest@nsf.gov
Work Phone Number: (111) 111-1111

Award and Organization Contact Information

Organization Short Name: test organization
Organization Type: Consortium - Non-Acad and Acad Orgs
Time Zone: America/Denver (SMT-7:00)
Organization Phone Number: (111) 111-1111
Organization Fax Number: (111) 111-1111
Organization Email: nsftest@nsf.gov

Cancel Previous **Submit**

Figure 5

Helpful Tip

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

Add a New Role to Add and Manage Organizations

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
DOE, JANE	SAM POC

Continue to My Profile >
Add Additional Roles >

Figure 6



How does a subrecipient organization register with NSF?

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

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



Add a New Organizational Role



To work on NSF proposal and award activities in Research.gov or via Grants.gov, a user must have an organization-approved role at an organization registered with NSF. To request a role from your organization, you must sign into [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 organizational role categories: Investigator, Organizational, Financial, and GRFP Official. Users should click the appropriate dark blue **Add Role** button (e.g., **Add Investigator or Authorized User Role** to request a PI role) to request the specified role and to proceed with the role wizard. Note that beneath each dark blue **Add Role** button, there is an information link (e.g., [PI/co-PI, Postdoctoral Fellow and OAU role details](#)) which provides additional information about the specific role. The table below outlines the role request options grouped by category.

If you need this organizational role(s)	To perform these functions	Select this “Add Role” Button
<ul style="list-style-type: none"> Principal Investigator (PI) Co-Principal Investigator (co-PI) Proposed Postdoctoral Fellow 	<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 Organizational 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

Important Notes:

- Reviewers, GRFP Applicants, GRFP Fellows, and fellowship reference letter writers will not add an organizational role. GRFP-specific Account Management training resources including guides and FAQs are available on the [GRFP Account Management page](#). Reviewers should follow the [Provide Reviewer Profile Information](#) aid for detailed instructions to complete their Reviewer Profile.
- Foreign Financial Disclosure Report (FFDR) Preparer role can only be assigned by Administrators and cannot be requested by users through the Account Management System. If you believe you should have this role and do not, please reach out to your organization’s Administrator.



Role Request Wizard Steps

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

Step 1: Find Organization

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

Note: For more information about System for Award Management (SAM) UEIs, go to [SAM.gov](#), or contact your Sponsored Projects Office (SPO).

- If your organization is not registered in SAM, go to [SAM.gov](#). Note that completion of the SAM registration process may take up to one month. Please check [SAM.gov](#) for information about any delays of SAM.gov registrations, validations and UEI issuance.

Step 2: Add Information

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

Note: If you are requesting a Principal Investigator or Proposed Postdoctoral Fellow role, you will need to enter additional data. Please see the following job aids for detailed instructions: [Add a New Organization-Approved Role – Principal Investigator](#) or [Add a New Organizational Role – Proposed Postdoctoral Fellow](#). 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.

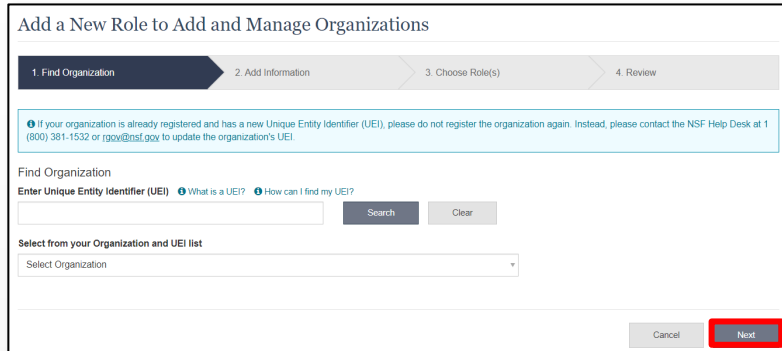


Figure 2

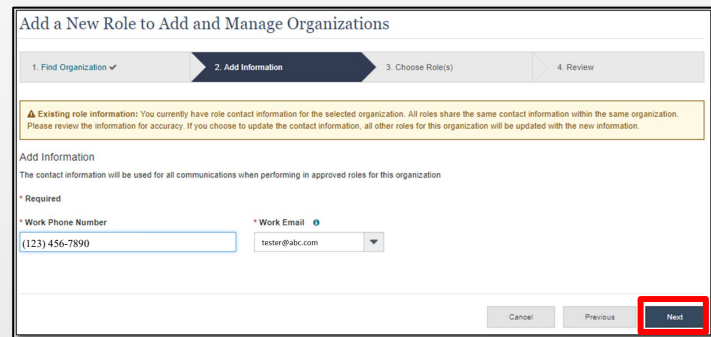


Figure 3



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), especially 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 Organizational Role(s)

- Select a role(s) and click **“Next”**. (Figure 4)

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

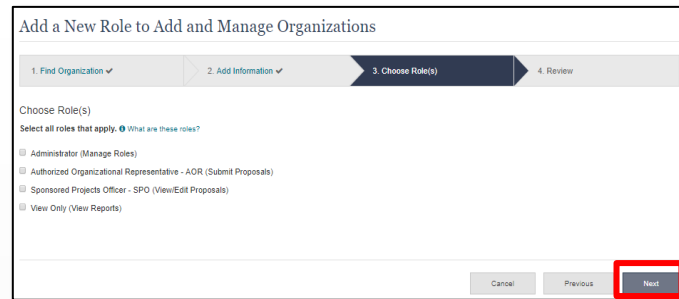


Figure 4

Step 4: Review and Submit

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

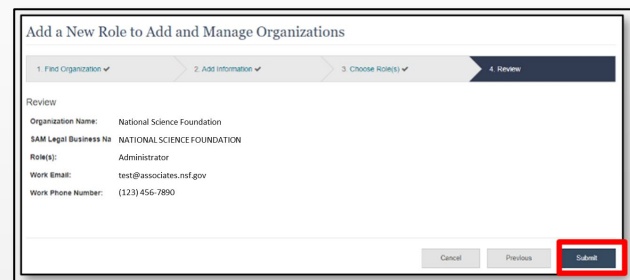


Figure 5

Success!

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

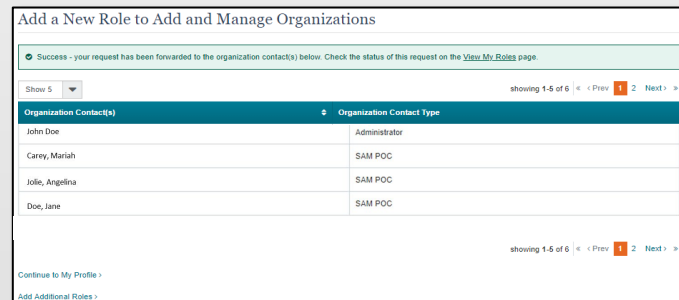


Figure 6



Helpful Tips

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



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



To work on NSF proposal and award activities in Research.gov or via Grants.gov, a Principal Investigator (PI)/co-Principal Investigator (co-PI) must have an organization-approved Investigator role. After requesting a role, your organization's Administrator will receive the request electronically to approve or disapprove it. To request an organization-approved role, you must sign into [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 an organization-approved Investigator role, click the blue **"Add Investigator or Authorized User Role"** button located in the "Prepare Proposals and Manage Awards" box. (Figure 1)
- Select **"Principal Investigator (PI) or co-Principal Investigator (co-PI)"**, click **"Submit"** (Figure 2) and a four-step role request wizard will display. (Figure 3)

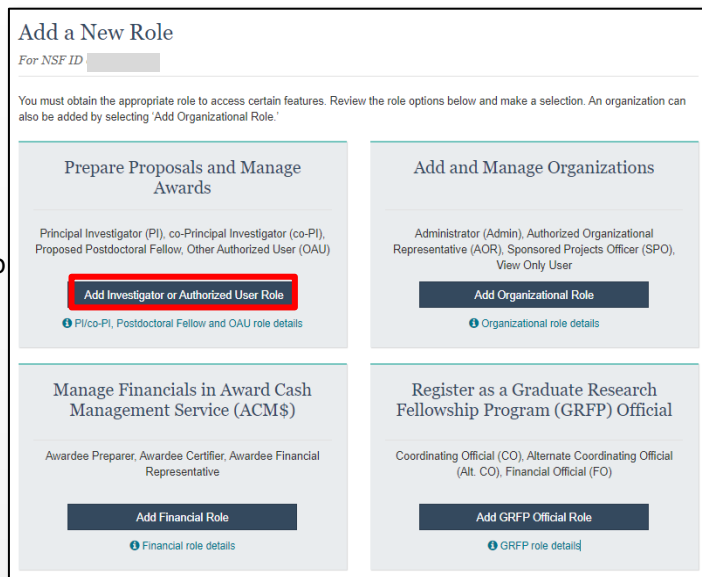


Figure 1

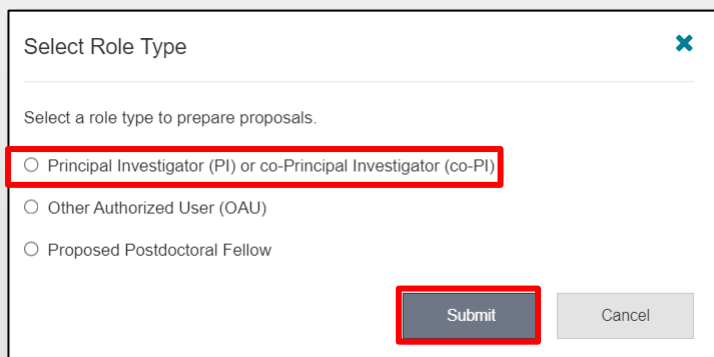


Figure 2

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, select the UEI associated with your existing organization from the drop-down menu. This step is the same whether your organization is a prime or subrecipient.
- Verify the correct organization is displayed in the results section and click **"Next"**.

Note: For more information about SAM UEIs, go to [SAM.gov](https://www.sam.gov). or contact your Sponsored Projects Office (SPO).

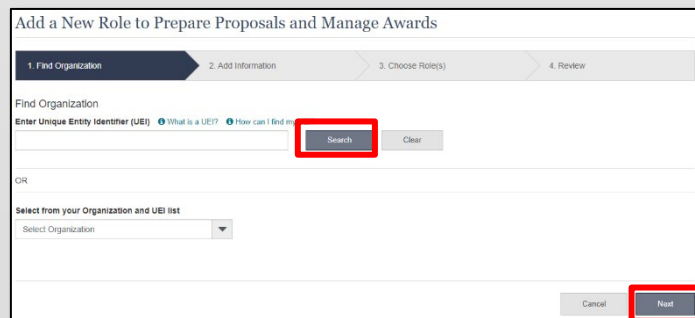


Figure 3



Step 2: Add Information

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

Important Note: Your demographic information will not be shared with the listed organizational contacts while reviewing and approving your role request.

Step 3: Choose Role(s)

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

Step 4: Review and Submit

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

Success!

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



Helpful Tips

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

Figure 4

Figure 5

Figure 6

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

Figure 7



Add a New Organizational Role – Proposed Postdoctoral Fellow



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

To request an organizational Investigator role, 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. Then select the “Add a New Role” option from the left navigation bar.

Access the Add a New Role page

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

Two-Step Process

Step 1: Add Information

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

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

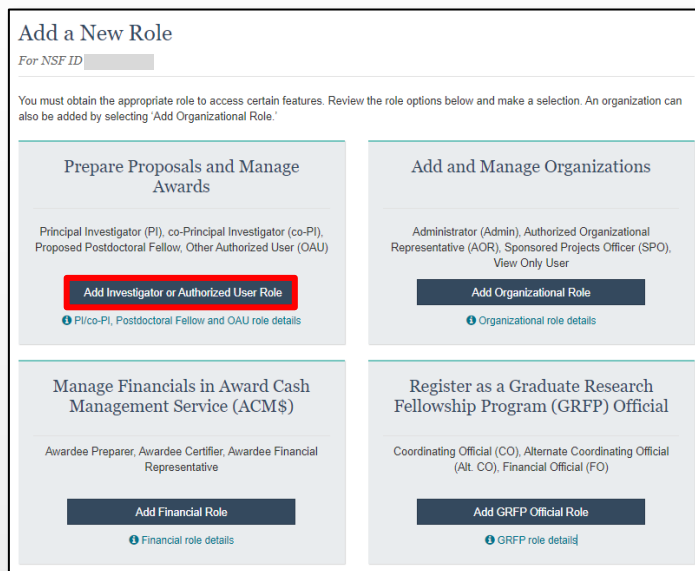


Figure 1



Helpful Tips

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

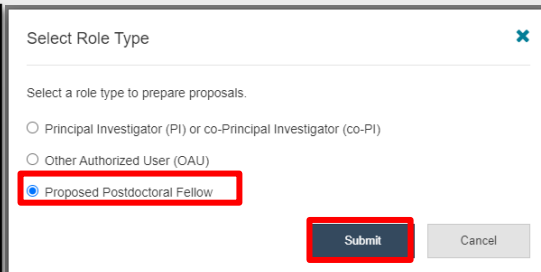


Figure 2



Add a Proposed Postdoctoral Fellow Role

* Required

Your Contact Details

* Work Phone Number: (111) 111-1111

* Work Email: John_doe@afbc.com

Your Degree Information

The degree information entered here will be used to populate the printed Cover Sheet of your proposals to NSF.

* Highest Degree Type: AS - Associate in Science

* Degree Year: 2005

Your Work Address

* Country: United States

* Time Zone: Pacific/Pago_Pago (GMT-11:00)

* Street Address: 123 Test St

Street Address (Line 2): Suite 100

* City: Alexandria

* State: Vermont

* Postal Code: 12345

Your Demographic Information

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, vacancies, and other research and educational opportunities as everyone else. For more information, read the Privacy Act Statement.

* Gender (Please select one): Unspecified, or another gender identity

* Ethnicity (Please select one): Hispanic or Latino

* Race (Please select all that apply): Asian, Black or African American

* Do you have a disability? (Please select one): Yes

Buttons: Cancel, **Next**

Figure 3

Step 2: Review

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

Add a Proposed Postdoctoral Fellow Role

Review your information for accuracy:

Organization Name: Dbc, John
Role: Proposed Postdoctoral Fellow

Your Contact Details

Work Phone Number: (111) 111-1111
Work Email: John_doe@afbc.com

Your Degree Information

Highest Degree Type: AS - Associate in Science
Degree Year: 2005

Your Work Address

Country: United States
Time Zone: Pacific/Pago_Pago
Street Address: 123 Test St
Street Address (Line 2): Suite 100
City: Alexandria
State: Vermont
Postal Code: 12345

Your Demographic Information

Gender: Unspecified, or another gender identity
Race: Asian, Black or African American
Ethnicity: Hispanic or Latino
Do you have a disability?: Yes

Buttons: Cancel, Previous, **Submit**

Figure 4

Step 3: Confirmation

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

Add a Proposed Postdoctoral Fellow Role

You have successfully added the Proposed Postdoctoral Fellow role. Please note that it can take up to 30 minutes for you to be able to prepare postdoctoral fellowship proposals.

Buttons: [Prepare and Submit Proposals >](#), [Continue to My Profile >](#), [Add Additional Roles >](#)

Figure 5



View My Organizational Roles – Requested Role(s)



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

Individuals who are reviewers will also see reviewer/meeting participant information including reviewer organizational affiliations displayed on this page. Please see the [View My Reviewer/Meeting Participant Information](#) job aid for additional reviewer 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 credentials (e.g., NSF ID and password) and click **“Sign In.”**
- Click **“My Profile”** located at the top right of the screen.
- Click **“View My Roles”** from the left navigation bar.
- Your pending role requests are displayed within the “Requested Role(s)” table

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

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

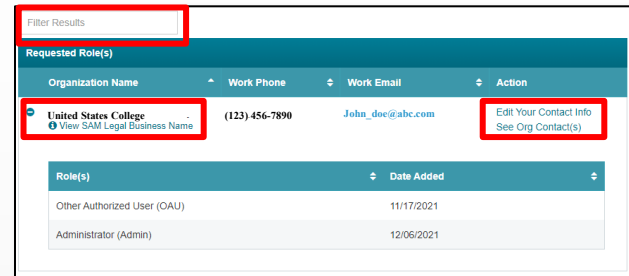


Figure 1

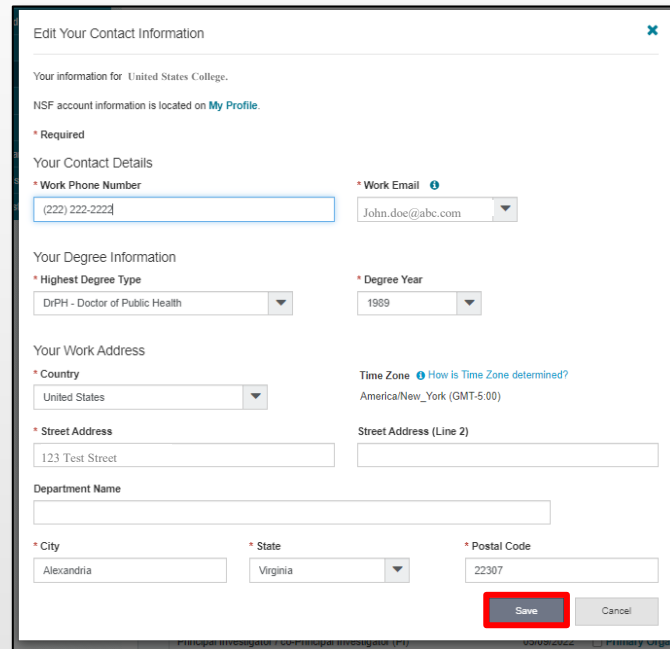


Figure 2



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.



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

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

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

Figure 3

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)

Organization Contact(s)	Organization Contact Type
Doe, John	Administrator
Doe, Jane	Administrator
Apple, Annie	Administrator
Pear, Priscilla	Administrator
Orange, Oliver	Administrator

Figure 4



Helpful Tips

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



View My Organizational Roles – Active Role(s)



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

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

Access the View My Roles page

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

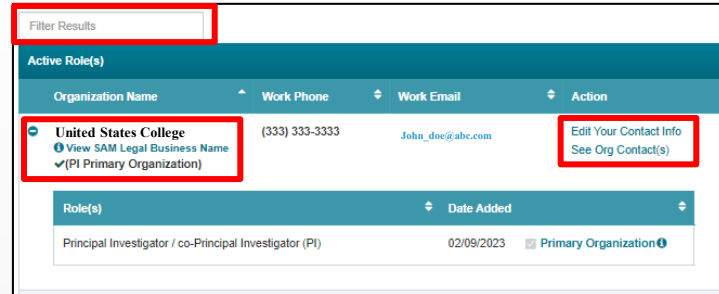


Figure 1

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

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

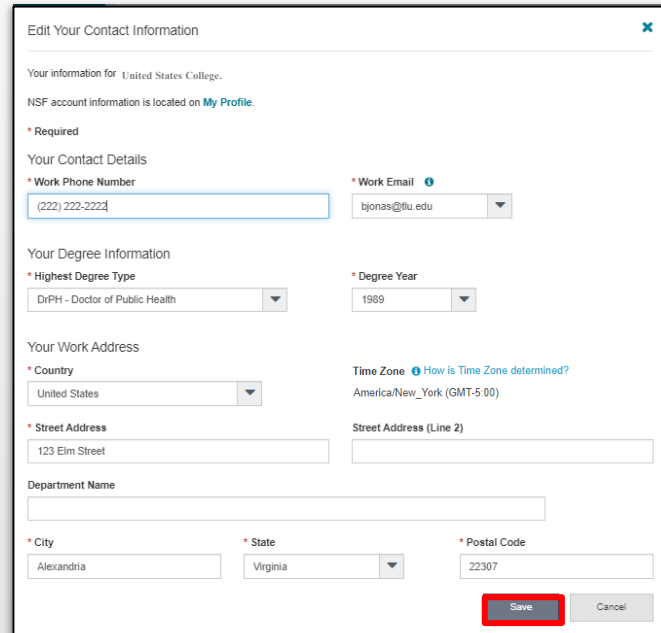


Figure 2



Helpful Tips

- The Active 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.



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

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

Figure 3

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

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

Figure 4

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

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

Organization Contact(s)	Organization Contact Type
Doe, John P.	Administrator
Doe, Jane	Administrator
Apple, Alice	Administrator
Pear, Priscilla	Administrator
Orange, Oliver	Administrator

Figure 5



Helpful Tips

- Each NSF account requires a primary email address and a work email address. (Figure 2 on previous page and Figure 3)
 - Your primary email address is used for important notifications about your NSF account such as password resets. It is critical that you have continued access to this email account (e.g., a Gmail address), especially if you change organizations.
 - Your work email address is associated with all your roles **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 set an organization as my primary organization for proposal submissions?

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

Organization Name	Work Phone	Work Email	Action
+ United States College <small>View SAM Legal Business Name</small> <small>✓(PI Primary Organization)</small>	(999) 999-9999	John_doe@abc.com	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 6



Helpful Tips

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



View My Users – Administrator Dashboard



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

Access the View My Users page

- Open [Research.gov](https://www.research.gov)
- Click “Sign In” located at the top right of the screen.
- Enter your credentials (e.g., NSF ID and password) and click “Sign In.”
- Click “My Profile” located at the top right of the screen.
- Click “View My Users” from the left navigation bar.

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

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

How do I add or remove user roles?

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

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

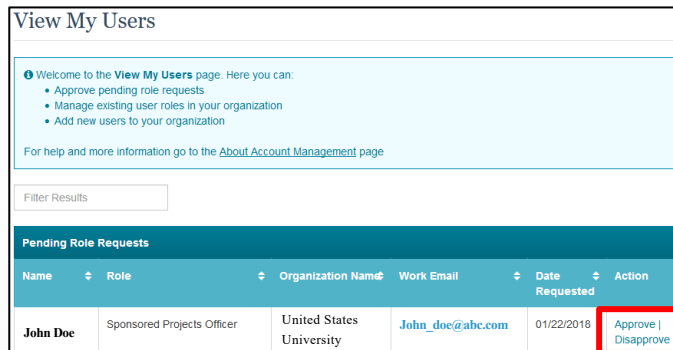


Figure 1

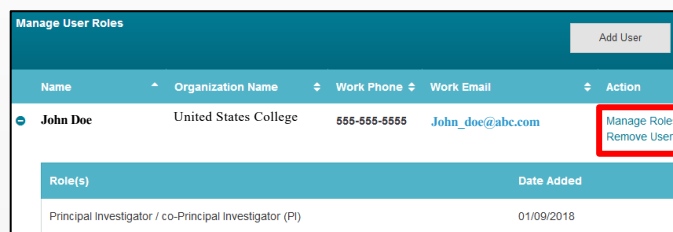


Figure 2

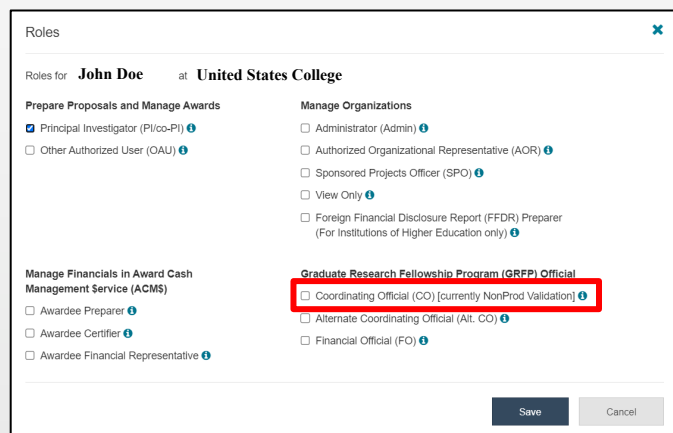


Figure 3



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

Figure 4

Name	Organization Name	Work Phone	Work Email	Action
John Doe	United States College		John_doe@abc.com	Manage Roles Remove User

Role(s)	Date Added
Principal Investigator / co-Principal Investigator (PI) Info Needed	01/18/2018

Figure 5



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

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

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

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

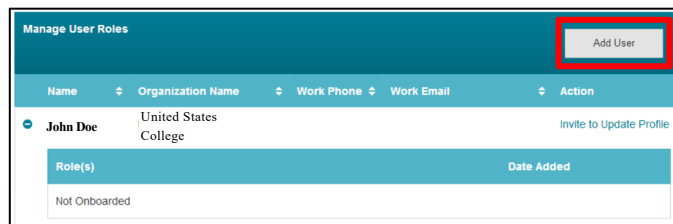


Figure 6

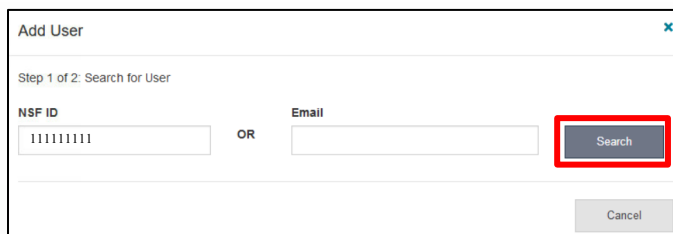


Figure 7

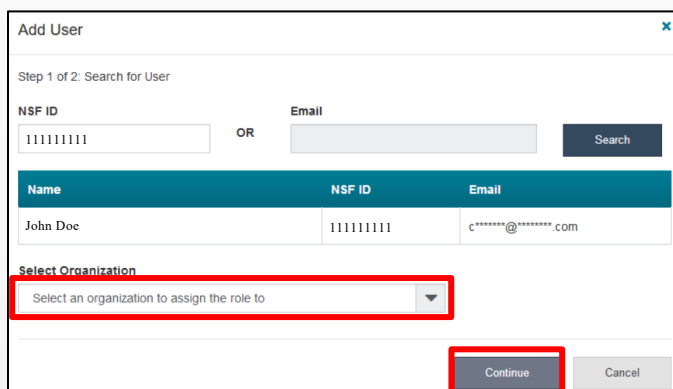


Figure 8

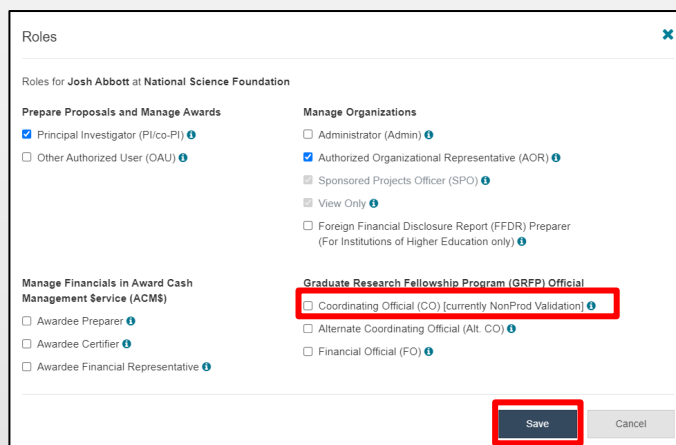


Figure 9



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

Figure 10

Name	Organization Name	Work Phone	Work Email	Action
John Doe	United States College		John_doe@abc.com	Manage Roles Remove User

Role(s)	Date Added
Principal Investigator / co-Principal Investigator (PI) Info Needed	01/18/2018

Figure 11



Helpful Tip

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



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

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

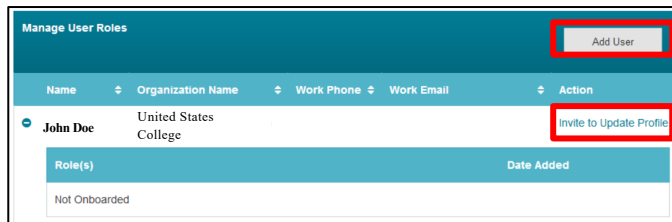


Figure 12

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

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

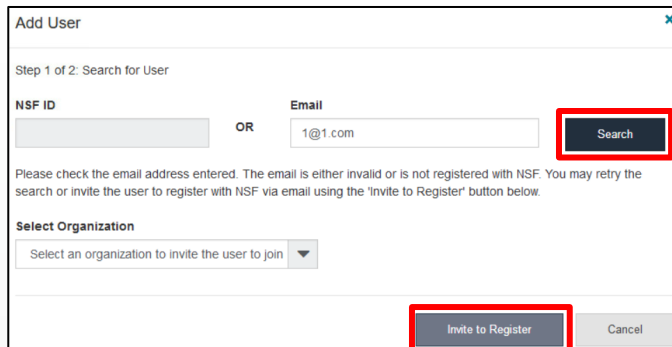


Figure 13

How do I remove a user from my organization?

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

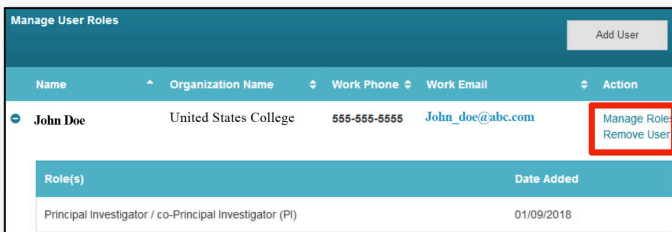


Figure 14

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

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

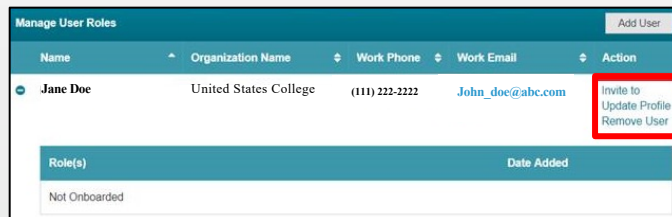


Figure 15

- Click “Remove User.” (Figure 16)



Figure 16



Helpful Tip

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



Migrate Your Existing NSF Account



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

How will the system prompt me to verify my information 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 if you have a PI role, 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 the Account Management System in Research.gov, please refer to the [View and Edit My NSF Account Profile Information](#) job aid.

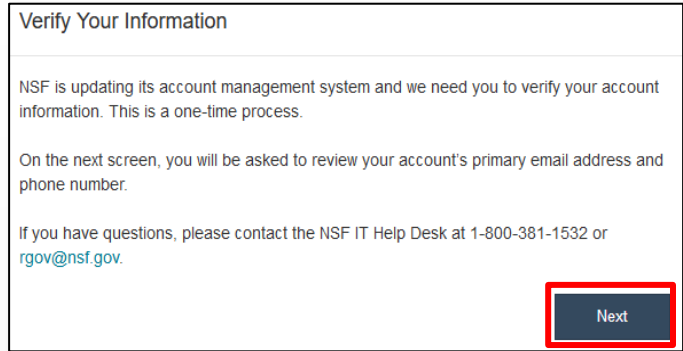


Figure 1

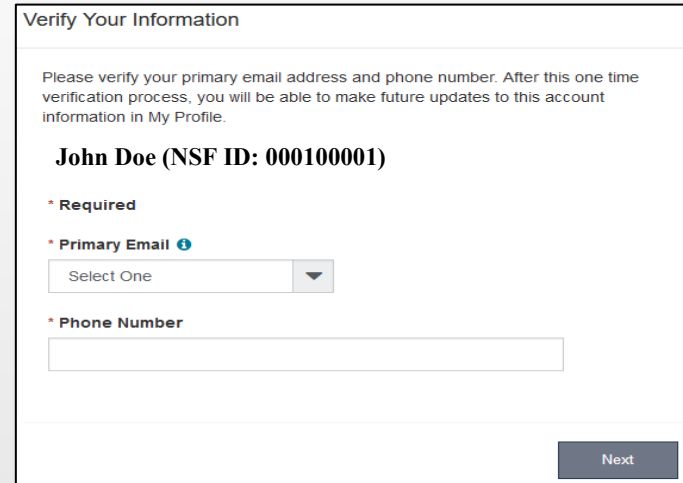


Figure 2

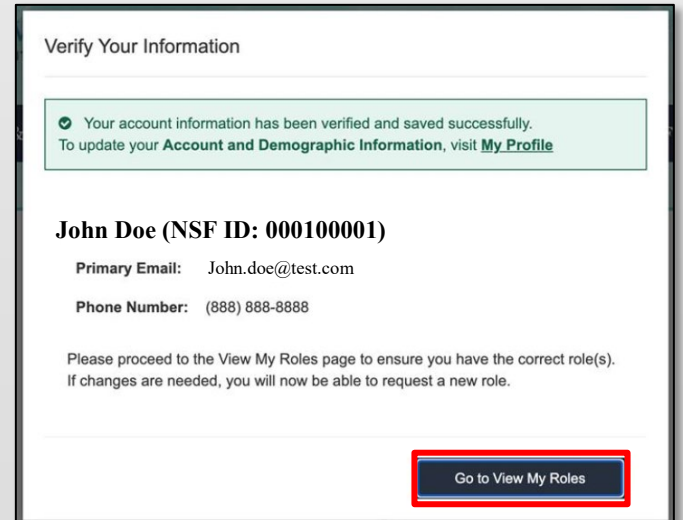


Figure 3



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

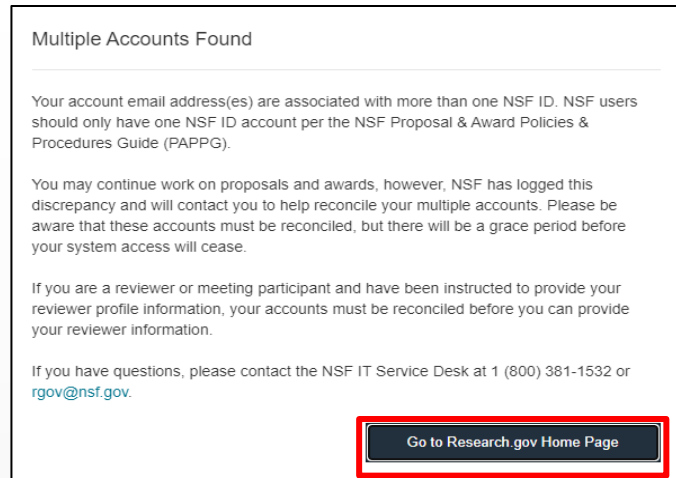


Figure 4

My grace period has expired. What do I do?

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

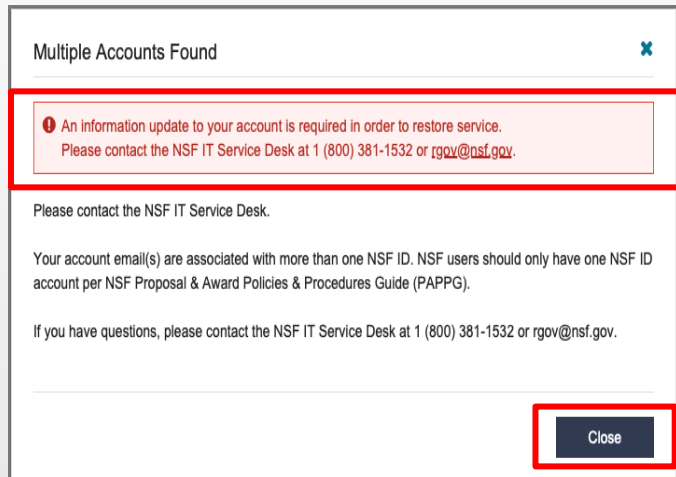


Figure 5

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

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

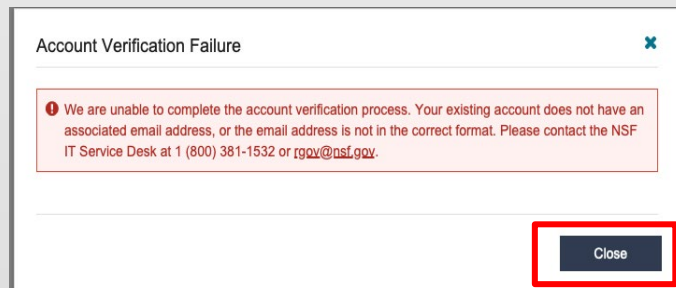


Figure 6



Reviewer Job Aids



Provide Reviewer Profile Information

NSF requires all reviewers and participants in panels, site visits, advisory committees, subcommittees, and committees of visitors to have an NSF account in Research.gov and complete a one-time registration process to provide their reviewer profile information. Until this is completed, reviewers cannot open the Reviews, Panels, and Other Meetings page in order to access proposals for ad hoc reviews, panelist, activities, meeting registration, and meeting sign-in.

Submit Invitation Code or Email Address

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

Verify Your Email Address

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

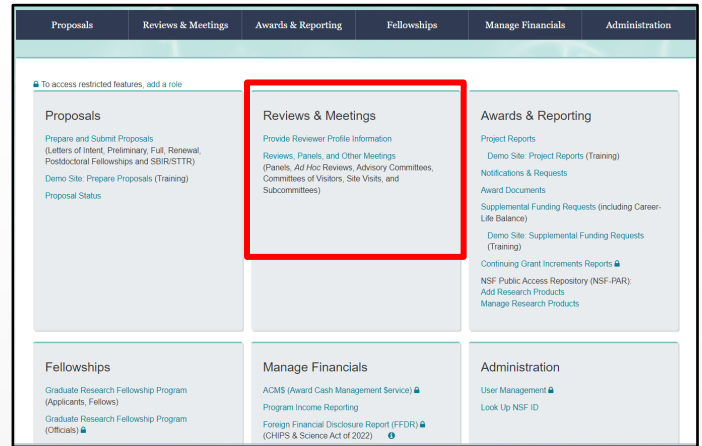


Figure 1

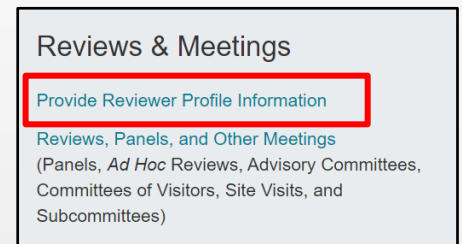


Figure 2

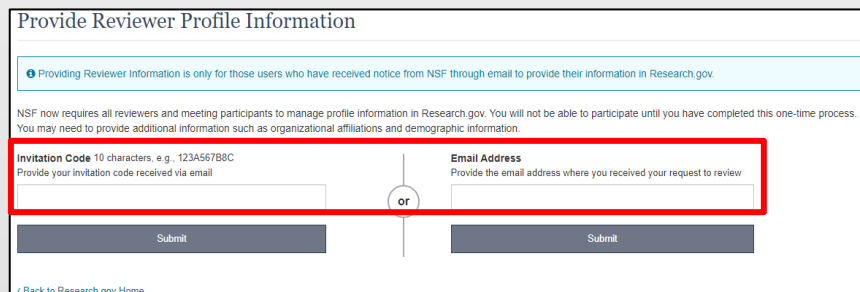


Figure 3

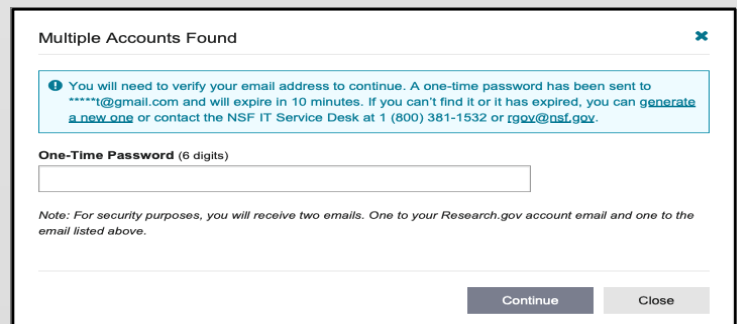


Figure 4



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

Step 1: Organizational Affiliation(s)

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

Important Note: If you already have an organization-approved role (e.g., PI role) at NSF, then “Yes” will be automatically selected by default and the “No” option will be disabled. (Figure 8)

Adding Organization(s)

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

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

Figure 5

Figure 6

Figure 7

Helpful Tips

- Unique Entity Identifiers (UEI) are issued by the System for Award Management (SAM). Please refer to [SAM.gov](https://sam.gov). Note that completion of the SAM registration process may take up to one month.

Figure 8



Step 2: Affiliation Details

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

Figure 9

Figure 10

Figure 11

Step 3: Demographic Information

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

Figure 12



Step 4: Additional Information

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



Helpful Tips

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

Provide Reviewer Profile Information

1. Organizational Affiliation(s) ✓ 2. Affiliation Details ✓ 3. Demographic Information ✓ 4. Additional Information 5. Review & Confirm

Additional Information

* **Required**

NSF asks for professional information to enable program officials to manage reviewer selection, as well as related merit review functions. For more information, read the [Privacy Act Statement](#).

Contact Preferences for Review/Meeting Activities

* **Preferred Email Address for Review/Meeting Activities** ⓘ

CKPoneUAT@gmail.com

CKPoneUATSecondary@gmail.com

Other (Please specify)

* **Preferred Phone Number for Review/Meeting Activities** ⓘ

(111) 111-1111

Other (Please specify)

Do not wish to provide

Figure 13

Degree

* **Highest Degree**

Select Highest Degree ▼

Area(s) of Expertise

Select **up to five** items that best describe your area(s) of expertise. If your area of expertise is not listed, you may add your own by selecting “Other (Please specify).”

* **Area(s) of Expertise** Add up to five

1. Select Area of Expertise ▼

+ Add Area of Expertise

Professional References

ORCID ID ⓘ 16-digits i.e., 1234-1234-1234-1234

Websites (e.g., Organizational faculty, staff profile, or professional website, LinkedIn, Google Scholar)
Websites may be used for NSF selection of reviewers.

+ Add Website

Figure 14



Step 5: Review & Confirm

- Review your information for accuracy and click **“Submit.”** (Figure 15)

Provide Reviewer Profile Information

1. Organizational Affiliation(s) ✓
2. Affiliation Details ✓
3. Demographic Information ✓
4. Additional Information ✓
5. Review & Confirm

Review & Confirm

Organizational Affiliations

<p>TEST University (UEI: XXXXXXXXXXXX) (Primary) View SAM Legal Business Name 123 Alpha Street College of Engineering Austin, TX 12345, US</p>	<p>United States Institute 123 Beta Street College of Law Arlington, TX 12346, US</p>
---	---

Demographic Information

Gender
Male

Race
American Indian or Alaska Native

Ethnicity
Hispanic or Latino

Do you have a disability?
No

Additional Information

Preferred Email Address for Review/Meeting Activities CKPoneUAT@gmail.com	Preferred Phone Number for Review/Meeting Activities (111) 111-1111
Highest Degree AS - Associate in Science (2000)	
Area(s) of Expertise Atmospheric Chemistry	
ORCID iD None Provided	
Websites Websites may be used for NSF selection of reviewers. testsite.com ↗ mysite.com ↗	

Figure 15

Submission Confirmation

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

My Profile

For NSF ID 123456789

You have successfully provided reviewer information for your Research.gov account. You can now access your assigned [Reviews, Panels, and Other Meetings](#).

Contact Information

Demographic Information

Academic/Professional Information

Update your profile information here. If you have a role at an organization, you can update your organization-specific information on [View My Roles](#).

Figure 16



View and Edit My NSF Reviewer Account Profile Information



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

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

Step 1: Access the View/Edit My Profile page

- Open [Research.gov](https://www.research.gov)
- Click “**Sign In**” located at the top right of the screen. (Figure 1)
- Enter your credentials (e.g., NSF ID and password) and click “**Sign In.**” (Figure 2)
- Click “**My Profile**” from the top right of the screen. (Figure 3)

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)



Figure 1

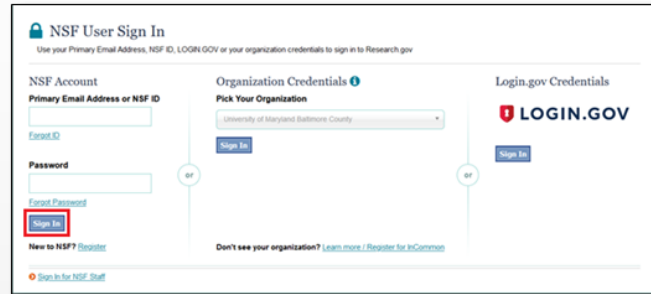


Figure 2



Figure 3

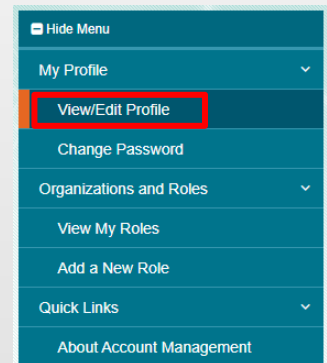


Figure 4



Step 2: Edit your Contact Information

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

Important Notes:

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

My Profile
For NSF ID: [redacted]

Contact Information | Demographic Information | Academic/Professional Information

Update your profile information here. If you have a role at an organization, you can update your organization-specific information on [View My Roles](#).

Name
Jane Doe

Alternate Name(s)
None Provided

Primary Email Address ⓘ For NSF Notifications and Password Recovery
Jane.DoeUAT@gmail.com

Secondary Email Address ⓘ Alternative Account Verification
None Provided

Preferred Email Address for Review/Meeting Activities ⓘ
Jane.DoeUAT@gmail.com

Phone Number
(222) 222-2222

Preferred Phone Number for Review/Meeting Activities ⓘ
(222) 222-2222

Edit

Figure 5

My Profile
For NSF ID: [redacted]

Contact Information | Demographic Information | Academic/Professional Information

Update your profile information here. If you have a role at an organization, you can update your organization-specific information on [View My Roles](#).

* Required

Prefix
Select Prefix

* First Name Middle Name/Initial * Last Name
Jane Doe

Suffix
Select Suffix

Alternate Name(s) (Nickname, Former Name, etc.)

*** Primary Email Address ⓘ For NSF Notifications and Password Recovery**
Jane.DoeUAT@usauniversity.edu

I understand that I must have ongoing access to my primary email address for account management and password resets, and I may not be able to sign in to Research.gov if I lose access to this address. I also understand that I can provide a work email address for proposal, award, and reviewer notifications on the "View My Roles" page.

Secondary Email Address ⓘ Alternative Account Verification

* Preferred Email Address for Review/Meeting Activities ⓘ
Jane.DoeUAT@gmail.com

Phone Number Extension
(222) 222-2222

Preferred Phone Number for Review/Meeting Activities ⓘ Extension
(222) 222-2222

Save Cancel

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.



Step 3: Edit your Demographic Information

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

Important Notes:

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

My Profile
For NSF ID [redacted]

Contact Information | **Demographic Information** | Academic/Professional Information

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, vacancies, and other research and educational opportunities as everyone else. For more information, read the [Privacy Act Statement](#).

Gender
Unspecified, or another gender identity

Race
White

Ethnicity
Not Hispanic or Latino

Do you have a disability?
No

Edit

Figure 7

My Profile
For NSF ID [redacted]

Contact Information | **Demographic Information** | Academic/Professional Information

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, vacancies, and other research and educational opportunities as everyone else. For more information, read the [Privacy Act Statement](#).

*** Required**

*** Gender (Please select one)**
 Male
 Female
 Unspecified, or another gender identity
 Do not wish to provide

*** Ethnicity (Please select one)**
 Hispanic or Latino
 Not Hispanic or Latino
 Do not wish to provide

*** Race (Please select all that apply)**

Race Definitions
 American Indian or Alaska Native
 Asian
 Black or African American
 Native Hawaiian or Other Pacific Islander
 White
 Other (Please specify) [text field]
 Do not wish to provide

*** Do you have a disability? (Please select one)**
What is considered a disability?
 Yes
 No
 Do not wish to provide

Save Cancel

Figure 8



Step 4: Edit your Academic/Professional Information

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

Important Notes:

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

Figure 9

Figure 10

Figure 11

Figure 12

Figure 13



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

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

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 in the [View and Edit My NSF Reviewer Account Profile Information](#) job aid)

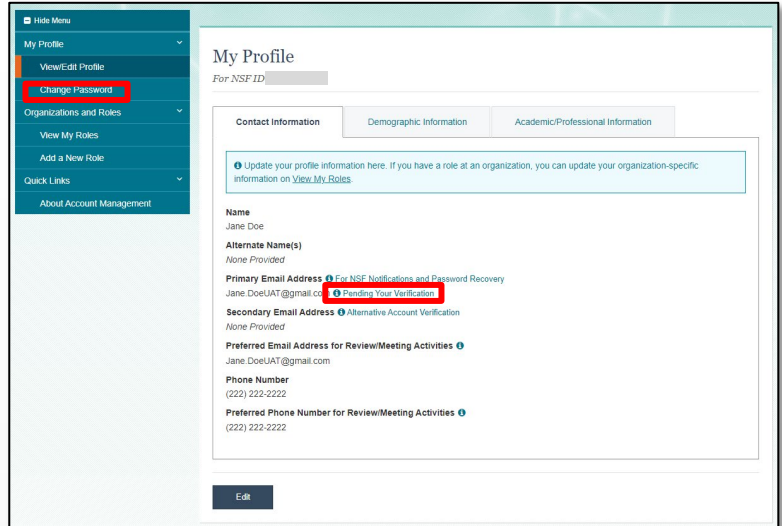


Figure 14

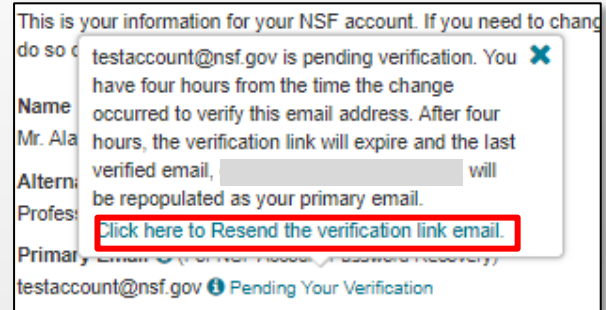


Figure 15



How do I change my password?

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

Change Password

For Research.gov

Enter your current password and then create a new password.

Current Password

New Password

Confirm Password

Your password needs to:

- Have at least 8, but no more than 20 characters
- Avoid using spaces
- Meet 3 of the 4 rules:
 - At least one lowercase letter
 - At least one capital letter
 - At least one number
 - At least one of the permitted special characters # & % ! @ ()

Note: you cannot re-use your last 6 passwords

Change Password

Figure 16

Change Password

For Research.gov

Success - Password Changed

Your password has been successfully changed in Research.gov and FastLane.

In the future, if you need to change your password, click the "My Profile" link on the top right of the page and select "Change Password".

Continue to Research.gov My Desktop

Figure 17



View My Reviewer/Meeting Participant Information



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

Access the View My Roles page

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

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

- Click **“Edit in My Profile”** in the Action column located on the right side of the Reviewer/Meeting Participant Information table. (Figure 1)
- You will be navigated to the **“Contact Information”** tab on My Profile where you can edit your preferred email address or phone number for review/meeting activities. You can update your organizational affiliation(s) on the **“Academic/Professional Information”** tab on My Profile. *Please see the [View and Edit My NSF Reviewer Account Profile Information](#) job aid for detailed instructions on accessing and updating My Profile.*

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

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

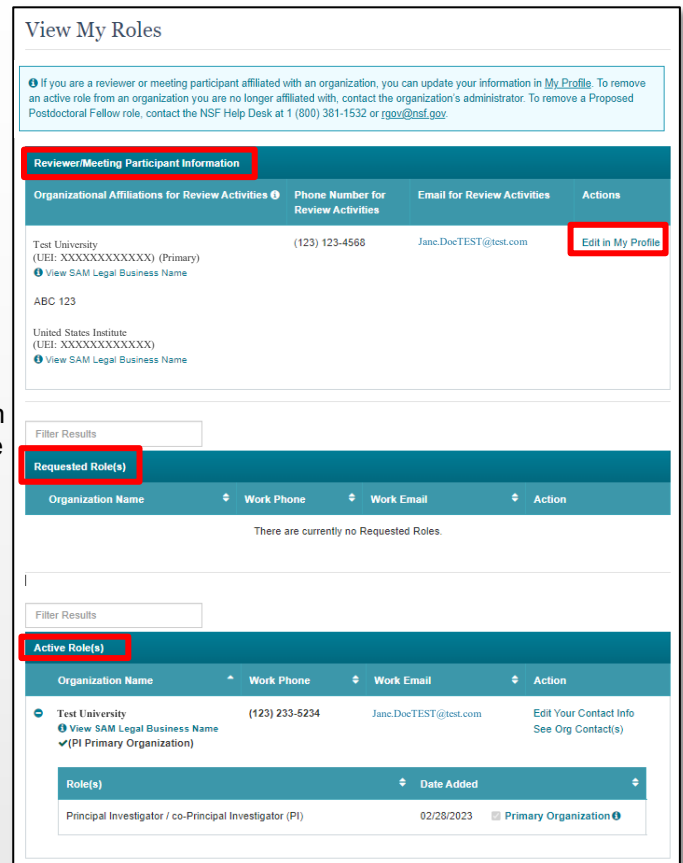


Figure 1



Accessing the Reviews, Panels, and Other Meetings Page



Once you have an NSF account and completed the one-time process to provide your reviewer profile information, you can access your assigned proposals, panels, or meetings via the Reviews, Panels, and Other Meetings page. Follow the step-by-step instructions below to access the assigned proposals, panels or meetings for your review.

Access the Reviews, Panels, and Other Meetings Page through Research.gov Homepage (Not Signed into Research.gov)

- Open [Research.gov](https://www.research.gov)
- Scroll down the page to "Reviews Panels & Other Meetings" (Figure 1)
- Click the **"Reviews, Panels and Other & Meetings"** link. You will be redirected to the Research.gov sign-in page. Upon successful sign in to Research.gov, you will be re-directed to the "Reviews, Panels, and Other Meetings" page (Figure 2).

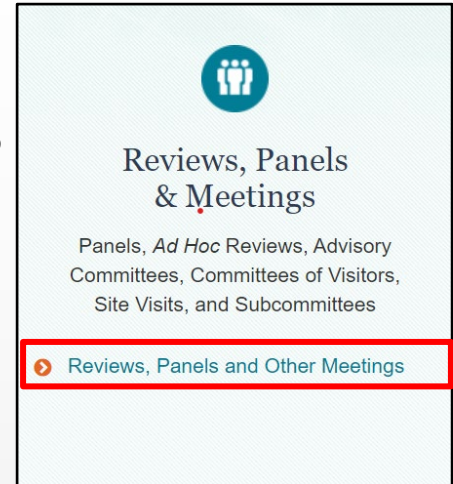


Figure 1

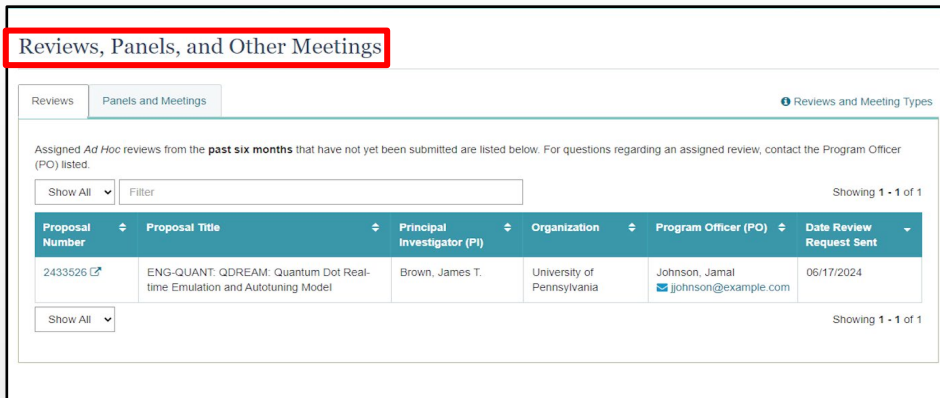


Figure 2

Access the Reviews, Panels, and Other Meetings Page through Research.gov Homepage (Signed In to Research.gov)

- Open [Research.gov](https://www.research.gov)
- Click **"Sign In"** located at the top right of the screen. (Figure 3)
- Enter your credentials (e.g., NSF ID and password) and click **"Sign In."** (Figure 4)
- Click the **"Reviews, Panels, and Other Meetings"** link on the "Reviews & Meetings" tile. (Figure 5)



Figure 3

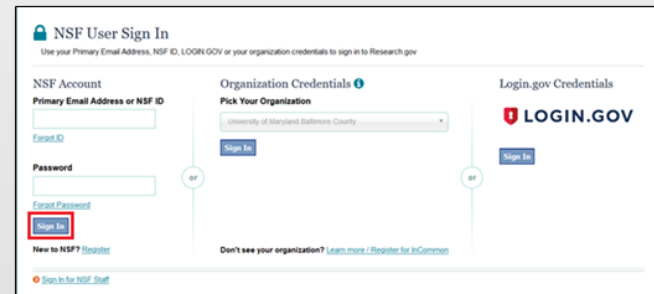


Figure 4

Important Note: You can also access the "Reviews, Panels, and Other Meetings" page by clicking the "Reviews, Panels, and Other Meetings" link under "Reviews and Meetings" on the top navigation bar. (Figure 6)

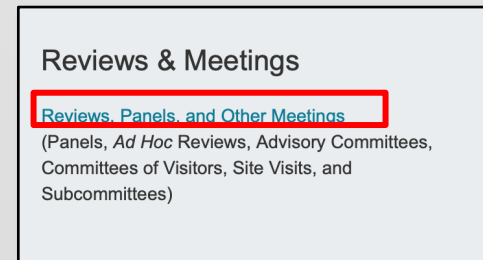


Figure 5

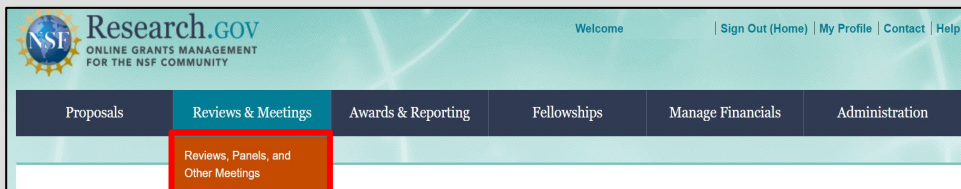


Figure 6



Using the Reviews, Panels, and Other Meetings Page to Access Reviewer Assignments



Reviewers use the “Reviews, Panels, and Other Meetings” page to access *ad hoc* proposals assigned for review and to access panels and meetings they have been invited to participate in by NSF program staff.

View Assigned Ad Hoc Reviews

- From the Reviews tab, click the proposal number in the **Proposal Number** column for the proposal you want to review.(Figure 1)
- The selected proposal for review will display for the reviewer to complete review activities.

Important Note: The “Reviews” table will only populate and display active reviews from the past six months, if the reviewer has linked their account by using completed the one-time process to provide their reviewer profile information. See [View or Edit My NSF Reviewer Account Profile Information](#) to link your reviewer profile to your account in Research.gov.

Reviews, Panels, and Other Meetings

Reviews Panels and Meetings Reviews and Meeting Types

Assigned *Ad Hoc* reviews from the **past six months** that have not yet been submitted are listed below. For questions regarding an assigned review, contact the Program Officer (PO) listed.

Show All Filter Showing 1 - 1 of 1

Proposal Number	Proposal Title	Principal Investigator (PI)	Organization	Program Officer (PO)	Date Review Request Sent
2344732	TEST PROPOSAL: Public Access Post-Release Testing and Troubleshooting	Alphaman, Alan H.	National Science Foundation	Duong, Peggy P. pduong@nsf.gov	07/12/2024

Show All Showing 1 - 1 of 1

Figure 1



View Assigned Panels and Meetings

- From the Panels and Meetings tab, click the meeting ID in the Meeting ID column for the panel or meeting you have been invited to participate in by NSF program staff. (Figure 2)
- The meeting details page will display meeting information, steps to complete for the meeting, and links to helpful resources.
- ***Important Note: Panels and Meetings will only display and be listed for one year following the meeting, if the reviewer has linked their account by using the one-time process to provide their reviewer profile information.***

Reviews, Panels, and Other Meetings

Reviews **Panels and Meetings** Reviews and Meeting Types

Select a Meeting ID below to register or check-in for the meeting, prepare your review, join your virtual meeting, or submit information for travel or reimbursement. Meetings are listed for **one year** following the meeting. For questions regarding a meeting, contact the Program Officer (PO) listed.

Show All [] Filter [] Showing 1 - 5 of 5

Meeting ID	Meeting Name	Program Officer (PO)	Meeting Status	Meeting Date(s)
P242669	Panel: Test FY24 Q4 Panel Meeting	Doe, Jane A. ✉ jadoe@example.com	Active	07/10/2024
C242175	Committee of Visitors: CHE COV Meeting 2024	Demo, Terri ✉ demot@example.com	Upcoming	08/08/2024 - 08/09/2024
V242626	Site Visit: 2DCC-MIP 2024 Site Visit	Example, Emily ✉ emilye@example.com	Upcoming	07/17/2024 - 07/18/2024
P242240	Panel: Capacity 2	Test, James ✉ test_james@example.com	Past	06/20/2024 - 06/21/2024
P242492	Panel: STEM Ed OPRF Panel 2- P242492	Reviewer, Amy I. ✉ reviewerai@example.com	Past	07/01/2024 - 07/05/2024

Show All [] Showing 1 - 5 of 5

Figure 2

i Reviews and meetings only appear for users who have received notice from NSF to provide their information in Research.gov. If you *have* received a request from NSF, [Provide Reviewer Profile Information](#) to see available reviews and meetings.

Figure 3



View the Meetings Details Page

- After clicking the Meeting ID from the Panels and Meetings tab, a Meeting Details page will display according to the meeting type (panel, site visit, committee of visitors, advisory committee, and subcommittee). (Figure 4)
 - Each page type will include meeting details such as meeting name, meeting type, meeting date(s), program officer information, and meeting status (active, upcoming, or past).
 - Each page type will include a “Helpful Links” section and a “Steps for the Meeting” section containing links.

Important Note: Links under “Steps for the Meeting” are meeting type specific and will display according to meeting type (panel, site visit, committee of visitors, advisory committee or subcommittee).

- **Clicking the links for Travel and Reimbursement, Meeting Attendance Check In and the Proposal Evaluation System (panels and sites visits only) will automatically navigate you to the appropriate page without having to enter additional credentials for access.**
- **Committee of visitors (COV) meeting participants will still require an NSF program-provided password to access the COV functionality.**

Meeting: Panel - P242669

Name:	Test FY24 Q4 Panel Meeting	
Type:	Meeting: Panel	Meeting Status: Upcoming
Meeting Date(s):	09/09/2024 - 09/10/2024	
Program Officer:	Doe, Jane A., ✉ jadoe@example.com	

Helpful Links

[Meetings at NSF Help](#) ↗

[Virtual Panelist Survey](#) ↗

[Guidance for Reviewers of CAREER Proposals](#) ↗

Steps for the Meeting

Prior to the Meeting

Review legal notices: Merit Review Principles, Merit Review Criteria, and Privacy Act and Public Burden Statements

Register for Meeting, provide banking information for **reimbursement**, and make **travel arrangements**: [Travel and Reimbursement](#) ↗

Download Conflicts of Interest Form 1230P ↗

Access proposals and prepare reviews: [Proposal Evaluation System](#) ↗

Day(s) of the Meeting and Following

Check into the meeting daily: [Meeting Attendance Check-In](#) ↗

Prepare reviews and summaries: [Proposal Evaluation System](#) ↗

Confirm banking and contact information for **reimbursement**: [Travel and Reimbursement](#) ↗

Figure 4



View the Reviews and Meeting Type Descriptions

- To view the reviews and meeting type descriptions, click the Reviews and Meeting Types link on the Reviews, Panels, and Other Meetings page. (Figure 5)
- A Reviews and Meeting Types modal will display with descriptions. (Figure 6)

Assigned *Ad Hoc* reviews from the **past six months** that have not yet been submitted are listed below. For questions regarding an assigned review, contact the Program Officer (PO) listed.

Show All ▾ Filter Showing 1 - 1 of 1

Proposal Number	Proposal Title	Principal Investigator (PI)	Organization	Program Officer (PO)	Date Review Request Sent
2344732 ↗	TEST PROPOSAL: Public Access Post-Release Testing and Troubleshooting	Alphaman, Alan H.	National Science Foundation	Duong, Peggy P. pduong@nsf.gov	07/12/2024

Show All ▾ Showing 1 - 1 of 1

Figure 5

Reviews and Meeting Types ✕

Reviews

Ad Hoc - Individual assessments of proposals outside the regular panel system, utilized when panel expertise lacks coverage of certain proposal aspects or when proposals arrive outside the typical funding cycle.

Meetings

Panels - A group of experts evaluates proposals submitted to NSF, providing advice and recommendations for financial support.

Site Visit - Evaluation of an organization's compliance with administrative regulations, public policies, and award terms for NSF grants.

Committee of Visitors - Periodic review to assess the quality and integrity of the foundation's program operations and technical matters related to proposal decisions.

Advisory Committee - External committees advising NSF directorates and offices, meeting biannually to review and advise on programs.

Subcommittee - Formed by advisory committees for specific purposes, reporting recommendations to the full committee for discussion.

Close

Figure 6