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



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

To work on National Science Foundation (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 <u>Research.gov</u> and select the "**My Profile**" link located on the top right of the screen. Select the "**Add a New Role**" option from the left navigation bar.

Access the Add New a Role page

- To request 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



Four-Step Role Wizard

Step 1: Find Organization

- Enter the organization's Unique Entity Identifier (UEI) and click "Search" (Figure 3). If you already have an organizationapproved role at NSF, 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 <u>SAM.gov</u>. or contact your Sponsored Projects Office (SPO).

Cornell UEI: G56PUALJ3KT5

Figure 2



Figure 3

Additional guidance including FAQs and instructional videos can be found on the Research.gov <u>About Account Management</u>. page. Account management questions may be directed to the NSF Help Desk at 1-800-381-1532 or <u>rgov@nsf.gov</u>. Version 2.2,



Account Managemer

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

Step 2: Add Information

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

<u>Important Note</u>: 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 prepopulated 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.



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Review				
Your Contact Dataila				
rour Contact Details				
Drganization Name: United States Coll RAM Level Pusiness Name: UNITED S	lege			
Role: Principal Investigator / co-Principal Inv	vestigator			
Work Email: John.doe@abc.com				
Work Phone Number: (123) 456-7890				
Your Degree Information				
Highest Degree Type: AS - Associate in Sci	lience			
Degree Year: 2017				
Your Work Address				
Country: United States				
Street Address: 1234 Street Address				
Street Address (Line 2):				
Deparament Name: City: Alexandria				
State: California				
Postal Code: 90036				
Your Demographic Information				
Gender: Male				
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Add a New Organizational Role – Proposed Postdoctoral Fellow



Add a New Organizational Role – Proposed Postdoctoral Fellow

To work on National Science Foundation (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 a UEI.

To request an organizational Investigator role, you must sign in to <u>Research.gov</u> and select the "**My Profile**" link located on the top right of the screen. Then select the "**Add a New Role**" option from the left navigation bar.

Access the Add a New Role page

- To request 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.

Click "Next." (Figure 3)

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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 1



Figure 2

Version 2.2, Updated October 2, 2023



Required			
Your Contact Details			
Work Phone Number	* Work Email O		
(111) 111-1111	John_doe@abc.com	•	
Your Degree Information			
The depree information entered here will be used to a	soculate the printed Cover Sheet of your processis to NS		
Hinhest Degree Type	* Degree Year		
AS - Associate in Science	* 2005	*	
Your Work Address			
Country	* Time Zone 0		
United States	 Pacific/Pago_Pago (GMT-11:00) 	*	
Street Address	Street Address (Line 2)		
123 Test St	Suite 100		
City	* State	* Postal Code	
Alavandria	Vermont	12344	
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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.

Review your information for accuracy. Organization Name: Dae, Jaha Role: Proposed Postdoctoral Fellow Your Contact Details Work Phone Number; (11) 111-1111 Work Review J. Ame Geglate.com

Add a Proposed Postdoctoral Fellow Role

	Cancel	Previous	Submit
Do you have a uisability :: 105			
Ethnicity: Hispanic or Latino			
Race: Asian, Black or African American			
Gender: Unspecified, or another gender identity			
Your Demographic Information			
Postal Code: 12345			
State: Vermont			
City: Alexandria			
Street Address (Line 2): Suite 100			
Street Address: 123 Test St			
Time Zone: Pacific/Pago_Pago			
Country: United States			
Your Work Address			
Degree Year: 2005			
Highest Degree Type: AS - Associate in Science			
Your Degree Information			
Your Degree Information			

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

Viso have successfully added the Proposed Postdoctoral Fellow role. Please note that it can take up to 30 minutes for you to be pare and Submit Proposals > timus to My Profile > Additional Roles >

Figure 5

Figure 4

View My Organizational Roles – Requested Role(s)



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 <u>View My Reviewer/Meeting Participant Information</u> job aid for additional reviewer <u>information</u>.

Access the View My Roles page

- Open <u>Research.gov</u>
- 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.

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)
- <u>Users who have a PI or co-PI role</u> 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 Help Desk at 1 (800) 381-1532 or rgov@nsf.gov. For general guidance on proposal preparation and submission, see the <u>NSF</u> <u>Proposal & Award Policies & Procedures Guide</u>.

Organization Name		Work Phone	÷	Work E	mail	•	Action
United States College O View SAM Legal Business Name]	(123) 456-7890		John_do	e@abc.com	[Edit Your Contact Info See Org Contact(s)
Role(s)				¢	Date Added		÷
Other Authorized User (OAU)					11/17/2021		
Administrator (Admin)					12/06/2021		

Edit Your Contact Information			>
Your information for United States College.			
NSF account information is located on My P	rofile.		
* Required			
Your Contact Details			
* Work Phone Number		* Work Email 🚯	
(222) 222-2222		John.doe@abc.c	com 🗸 🔻
DrPH - Doctor of Public Health Your Work Address	•	1989	•
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* Street Address		Street Address (Li	ine 2)
123 Test Street			
Department Name			
* City	* State		* Postal Code
Alexandria	Virginia	-	22307
			Save Cancel





- 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.

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



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)

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

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

- Locate the organization and click "See Org Contact(s)" in the "Action" column located on the right side of Requested Role table. (Figure 1 on previous page)
- The Organization Contacts modal box will appear. (Figure 4)





Helpful Tips

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• Each NSF account requires a primary email address and a work email address. (Figure 2 on previous page & Figure 3)

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

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

View My Organizational Roles – Active Role(s)



View My Organizational Roles – Active 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. You may set your Primary Organization designation if you have a PI/co-PI role at an organization or 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 <u>View My Reviewer/Meeting Participant Information</u> job aid for additional reviewer information.

Access the View My Roles page

- Open <u>Research.gov</u>
- Click "Sign In" located at the top right of the screen.
- Enter your 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.

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)
- <u>Users who have a PI or co-PI role</u> 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 Help Desk at 1 (800) 381-1532 or <u>rgov@nsf.gov</u>. For general guidance on proposal preparation and submission, see the <u>NSF</u> <u>Proposal & Award Policies & Procedures Guide</u>.



Edit Your Contact Information		×
Your information for United States College.		
NSF account information is located on My	Profile.	
* Required		
Your Contact Details		
* Work Phone Number		* Work Email ()
(222) 222-2222		John.doe@abc.com
Your Degree Information * Highest Degree Type DrPH - Doctor of Public Health Your Work Address * Country United States * Street Address	v	* Degree Year 1989 Time Zone @ How is Time Zone determined? America/New_York (GMT-5:00) Street Address (Line 2)
123 Test Street		
Department Name		
* City	* State	* Postal Code
Alexandria	Virginia	22307
тиоран	vesigator / co-Principal	Save Cancel

Figure 2

Figure 1

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.



Account Manageme

View My Organizational Roles – Active Role(s) (continued)

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)
- <u>Users who have a Proposed Postdoctoral Fellow role</u> 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 Help Desk at 1 (800) 381-1532 or <u>rgov@nsf.gov</u>. For general guidance on proposal preparation and submission, see the <u>NSF Proposal & Award Policies &</u> <u>Procedures Guide</u>.

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)
- <u>Users who have roles other than PI, co-PI or Proposed</u> <u>Postdoctoral Fellow roles</u> will see the screen depicted in Figure 4 and can edit their work phone number and work email address. Then click "Save".

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

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

Helpful Tips

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

Your information for Doe, John			
NSF account information is locat	ed on My Profile.		
* Required			
Your Contact Details			
* Work Phone Number		* Work Email ()	
(123) 456-7890		John.doe@abc.com	
* Highest Degree Type AA - Associate in Arts Your Work Address		* Degree Year 2023 These Zeas @ May 1: These Zeas determined?	
Listed States		Time Zone () How is Time Zone determined?	
* Street Address 123 Test Street	Street Address	• Allencarree _ IOA (5001-5.00)	
* City	* State	* Postal Code	
ony			

Edit Your Contact Information X Your information for United States Callege. NSF account information is located on My Profile. * Required * Work Phone Number (123) 456-7890 Jahn.doc@abc.com Stive Cancel

Figure 4



Figure 5

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



Account Managemei

View My Organizational Roles – Active Role(s) (continued)

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

- <u>Prerequisites</u>: 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 <u>Add a New Organization-Approved Role - Principal</u> <u>Investigator PI/Co-PI</u> job aid.
 - If you don't have a Proposal Postdoctoral Fellow role and would like to request one, refer to the <u>Add a New</u> <u>Organizational Role – Proposed Postdoctoral Fellow job</u> 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.

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.

ct	ive Role(s)			
	Organization Name Work Phone	÷	Work Email	
•	United States College (999) 999-9999 View SAM Legal Business Name (PI Primary Organization)		John_doe@abc.com	Edit Your Contact Info See Org Contact(s)
-				
	Role(s)	-	Date Added	÷
	Role(s) Other Authorized User (OAU)		Date Added 11/29/2021	
	Role(s) Other Authorized User (OAU) Principal Investigator (PI)		Date Added 11/29/2021 11/29/2021	e Primary Organization 🔁

Cornell UEI: G56PUALJ3KT5

Figure 6