



National Science Foundation  
OFFICE OF INFORMATION & RESOURCE MANAGEMENT

# Proposal Submission Modernization (PSM) at NSF

September 22, 2016

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Human Resource Management  
Information Systems  
Chief Information Officer



# Agenda

Introduction and Proposal Initiation Wizard

Personnel, Roles, and Proposal Invitations

Exercise: Personnel

Budget and Budget Justification

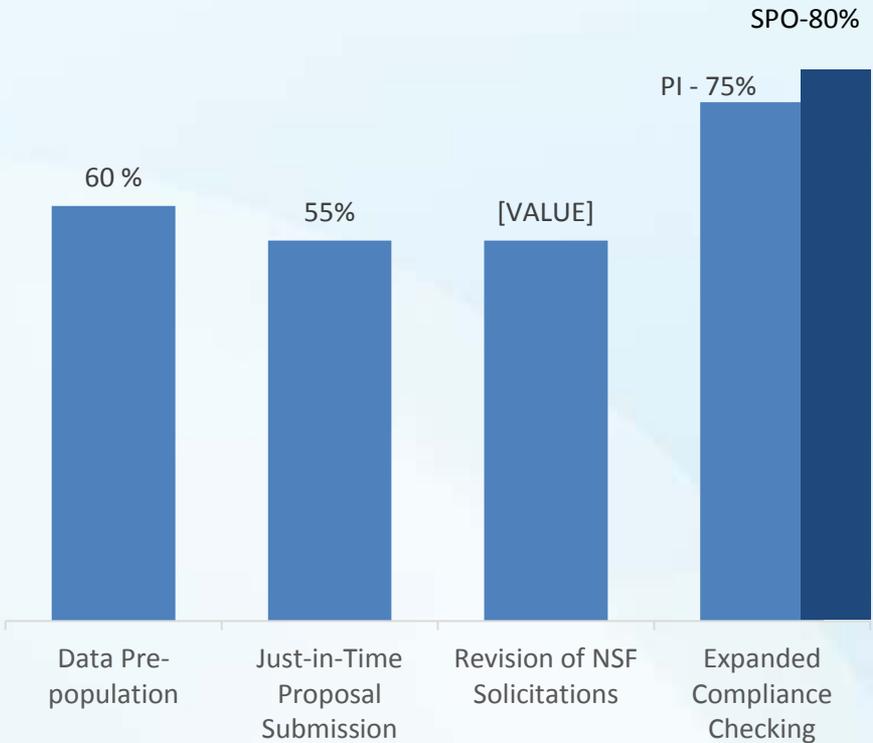
Exercise: Budget

# PSM Survey Summary Findings

## The problem statement



## Suggestions for potential solutions

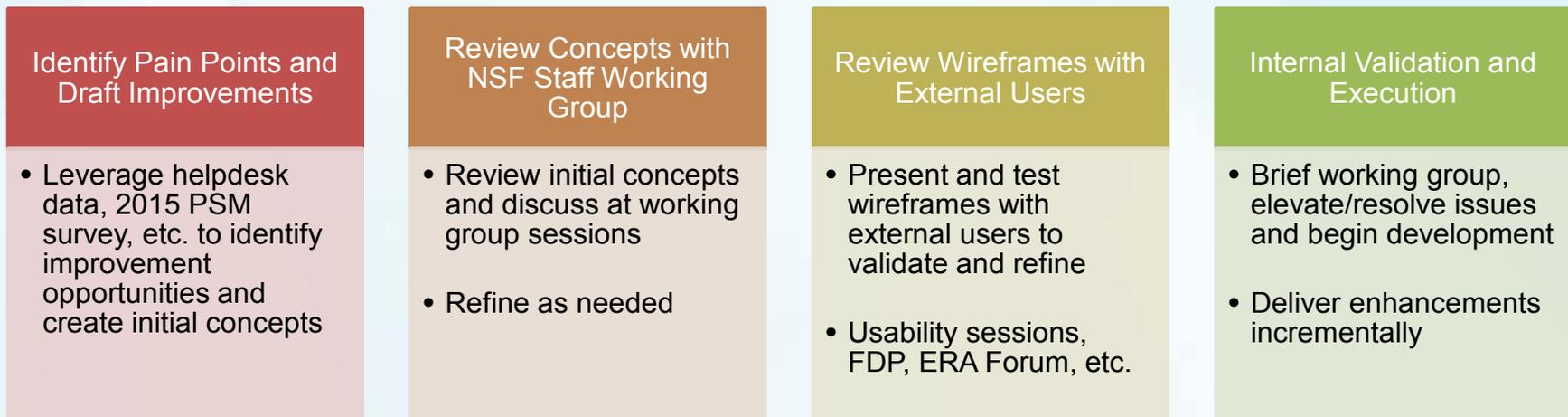


## PSM Vision

- Modernize the applications supporting the merit review process and the user experience via the development of a new application
- Reduce the administrative burden to the research community and NSF staff associated with preparation, submission, and management of proposals
- Increase efficiencies in proposal preparation, submission, and management
- Improve data quality
- Capture proposal content in a way that supports data analysis

# PSM Agile Concept Development

- PSM is following an agile process to develop, review, and refine wireframes (webpage mockups) that leverages knowledge of the existing pain points
- External users are engaged throughout the process to ensure the overall approach, workflows, and wireframes are consistent with user needs
- Development of features and enhancements will be deployed incrementally (future pilot activity)



**Research.gov**  
ONLINE GRANTS MANAGEMENT FOR THE NSF COMMUNITY

Log in | Home | Contact | Help | About

Search

**Online grants management for the NSF community**  
Research.gov is the modernization of FastLane, providing the next generation of grant management capabilities for the NSF research community.

[More](#)

**Prepare & Submit Proposals**

Prepare, submit and check status of proposals

- Prepare Proposals
- Check Proposal Status

**FASTLANE PROPOSAL FUNCTIONS**

- Additional proposal functions

**Proposal/ Panel Review**

Review proposals, participate in panels

**FASTLANE PROPOSAL REVIEW**

- Proposal Review

**FASTLANE PANEL REVIEW**

- Panelist Functions

**Awards & Reporting**

Submit project reports, notifications & requests

- Project Reports
- Deposit Public Access Publication
- Example Project Reports (Demo site)

**Fellowships & Honorary Awards**

Nominate colleagues, apply for awards

- Graduate Research Fellowship Program (GRFP)
- Postdoctoral Fellowships and Other Programs
- Honorary Awards

**Administration**

Manage your account and user roles

- User Management

**FASTLANE ORGANIZATION MANAGEMENT**

- Research Administration

**Manage Financials**

View balances and submit cash requests

- Submit or manage payment transactions
- More about ACMS
- Program Income Reporting

**NSF Award Highlights**

- Explore Scholarly publications in the NSF Public Access Repository (NSF-PAR)
- Search awards going back to 1994

• Users access proposal preparation via Research.gov



Welcome Alan Alphaman | [Logout \(Home\)](#) | [My Profile](#) | [Contact](#) | [Help](#) | [About](#)

[My Desktop](#)

[Prepare & Submit Proposals](#)

[Awards & Reporting](#)

[Manage Financials](#)

[Administration](#)

My Desktop > Proposal Preparation

## Proposal Preparation

What would you like to work on?

### Create New Proposal

Get started by answering a few questions to enable NSF to customize your proposal interface and compliance rules.

Create New Proposal

What information will need to be provided?

### In Progress Proposals

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

Work with In Progress Proposals

0 In Progress Proposal(s)

### Submitted Proposals

View, download or withdraw proposals that have previously been submitted to NSF.

View Submitted Proposals

0 Submitted Proposal(s)

- After logging in to Research.gov, the user may start a new proposal as well as access draft or submitted proposals

My Desktop > Proposal Preparation > Create New Proposal

• Indicator shows required proposal setup process steps

## Create New Proposal

- 1. Funding Opportunity
- 2. Where to Apply
- 3. Proposal Type
- 4. Submission Type
- 5. Title & Collaborative Info

### Select Funding Opportunity

Show 10

Showing 1 to 10 of 288 | < < Prev 1 2 3 4 5 Next > >

Select	Funding Opportunity Number ⓘ	Funding Opportunity Title
<input type="radio"/>	NSF 16-1	Grant Proposal Guide - GPG
		Origin of Life
		Origin of Life
		Division of Physics: Investigator-Initiated Research Projects
<input type="radio"/>	NSF 16-560	GeoPRISMS Program
<input type="radio"/>	NSF 16-559	Robert Noyce Teacher Scholarship Program
<input type="radio"/>	NSF 16-558	Mathematical Sciences Postdoctoral Research Fellowships
<input type="radio"/>	NSF 16-556	Tectonics
<input type="radio"/>	NSF 16-555	Small Business Technology Transfer Program Phase I (STTR)
<input type="radio"/>	NSF 16-554	Small Business Innovation Research Program Phase I

• Opportunities may be filtered and/or sorted to aid selection

• Only "live" funding opportunities are available

Show 10

Showing 1 to 10 of 288 | < < Prev 1 2 3 4 5 Next > >

Previous
Next

My Desktop > Proposal Preparation > Create New Proposal

## Create New Proposal

- Funding opportunity selection triggers customized options in subsequent screens

1. Funding Opportunity ✓

2. Where to Apply

3. Proposal Type

4. Submission Type

5. Title & Collaborative Info

### Select Where to Apply

Select where within NSF you would like to send your proposal. Depending on the funding opportunity, you may make one or multiple selections. When you have saved your selection(s), click 'Next' to continue.

#### Funding Opportunity

NSF 16-1 - Grant Proposal Guide - GPG

#### Select Where to Apply ⓘ

##### Select Directorate

Direct For Biological Sciences (BIO) ▼

##### Select Division

Division Of Integrative Organismal Sys (IOS) ▼

##### Select Program

--Select One-- ▼

Save Selection

#### Saved Selections

Select your program on the left. Place selections in the order of importance.

Direct For Biological Sciences (BIO), Division Of Integrative Organismal Sys (IOS), ANIMAL BEHAVIOR

- Similar to today, users may be required to select the applicable UOC(s) ("where to apply")

Previous

Next



My Desktop > Proposal Preparation > Create New Proposal

## Create New Proposal

1. Funding Opportunity ✓

2. Where to Apply ✓

3. Proposal Type

4. Submission Type

5. Collaborative Info & Title

### Select Where to Apply ?

Your proposal will be directed to the following NSF Unit of Consideration. Click 'Next' to continue.

**Funding Opportunity**  
NSF 16-556 - Tectonics

**Directorate**  
Directorate For Geosciences (GEO)

**Division**  
Division Of Earth Sciences (EAR)

**Program**  
TECTONICS

- This is the same UOC screen, but with a different example funding opportunity.
- In such cases, the user simply validates the data before selecting “next”.

Previous

Next



My Desktop > Proposal Preparation > Create New Proposal

## Create New Proposal

1. Funding Opportunity ✓

2. Where to Apply ✓

3. Proposal Type

4. Submission Type

5. Title & Collaborative Info

### Select Proposal Type

What type of proposal will be used? ⓘ

- Research
  - Rapid Response Research (RAPID) Proposals
  - Early-concept Grants for Exploratory Research (EAGER)
  - Research Advanced by Interdisciplinary Research and Engineering (RAISE)
  - Grant Opportunities for Academic Liaison with Industry (GOALI)
  - Ideas Lab
  - Facilitation Awards for Scientists and Engineers with Disabilities (FASSED)
- Conferences
- Equipment
- Travel
- NSF Center Proposals
- Major Research Equipment and Facility Construction Proposals
- Fellowship

- User chooses the applicable proposal type
- Again, the choices shown here will be customized to the funding opportunity

Previous

Next

My Desktop > Proposal Preparation > Create New Proposal

## Create New Proposal

1. Funding Opportunity ✓

2. Where to Apply ✓

3. Proposal Type ✓

4. Submission Type

5. Title & Collaborative Info

### Select Submission Type

What would you like to prepare?

- Letter of Intent
- Preliminary Proposal
- Full Proposal
- Full Proposal related to a Preliminary Proposal
- Renewal
- Accomplishment Based Renewal

- After choosing the proposal type, the user indicates the proposal submission type

Previous

Next

My Desktop > Proposal Preparation > Create New Proposal

## Create New Proposal

1. Funding Opportunity ✓ 2. Where to Apply ✓ 3. Proposal Type ✓ 4. Submission Type ✓ 5. Collaborative Info & Title

### Proposal Collaborative Information & Title

Are you preparing a collaborative proposal involving multiple organizations? ⓘ What is a collaborative proposal?

- Yes, proposals will be submitted separately ⓘ
- Yes, this proposal will be submitted by one organization and funds associated with collaboration will be treated as subawards ⓘ
- No

What type of collaborative proposal are you preparing?

- This is a lead proposal
- This is a non-lead proposal

Proposal Title

Test

• PSM plans to clarify existing FastLane language to address confusion related to collaborative proposals

• This conditional question appears if the user indicates s/he is preparing a separately submitted collaborative proposal

• After providing all setup information, the system will create a tailored user interface and ruleset for automated compliance checks

Previous

Create Proposal



My Desktop > Proposal Preparation > Full Proposal - 1234567

## Full Proposal - 1234567

**Title:** xx [Change]

**Funding Opportunity:** NSF 16-570 [↗](#) - Origin of Life [Change]

**Where to Apply:** Direct For Biological Sciences (BIO) - Emerging Frontiers (EF), CROSS-EF ACTIVITIES

**Proposal Type:** Research [Change]

**Submission Type:** Full Proposal [Change]

• Users may change data provided in the setup process

• Required documents appear first and optional sections follow

**Proposal Actions**

- Allow SPO Access
- Check Proposal Compliance
- Print Proposal
- Delete Proposal

**Collaborative Proposal**

Lead Collaborator [Change]

Links(s): Not linked

Link Collaborative Proposals

**Other Authorized Users**

Proposal shared with:

0 Authorized Users

Share with Other Authorized User

**Helpful Links**

- View submitted proposals
- Contact IT Help Central
- Proposal and Award Policies and Procedures Guide (PAPPG) [↗](#)

Proposal Sections	Status	Last Updated	Compliance Status
<b>Required</b>			
Cover Sheet	<input type="radio"/> Not started		Not checked
Personnel and Associated Documents <b>!</b>	<input type="radio"/> Not started		Not checked
Project Summary	<input type="radio"/> Not started		Not checked
Project Description	<input type="radio"/> Not started		Not checked
References Cited	<input type="radio"/> Not started		Not checked
Budgets	<input type="radio"/> Not started		Not checked
Budget Justification	<input type="radio"/> Not started		Not checked
Facilities, Equipment, and Other Resources	<input type="radio"/> Not started		Not checked
Data Management Plan	<input type="radio"/> Not started		Not checked
Collaboration Plan	<input type="radio"/> Not started		Not checked
Management Plan	<input type="radio"/> Not started		Not checked
<b>Conditionally Required</b>			
Postdoctoral Mentoring Plan <b>!</b>	<input type="radio"/> Not started		Not checked
Deviation Authorization <b>!</b>	<input type="radio"/> Not started		Not checked
<b>Optional</b>			
Letters of Support	<input type="radio"/> Not started		Not checked
RUI Impact Statement	<input type="radio"/> Not started		Not checked
Suggested Reviewer List <b>!</b>	<input type="radio"/> Not started		Not checked

Due to our agile process, you may notice that the following slides show a slightly different version of this screen



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# Personnel

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# Proposal - 7654321

Title: Supporting Faculty in Quantitative Undergraduate Biology Education and Synthesis Save

Funding Opportunity: NSF 16-505 - Faculty Early Career Development Program [\[Change\]](#)

Where to Apply: Biological Sciences (BIO) - Environmental Biology (DEB), Thermal Transport Processes [\[Change\]](#)

Proposal Type: Research Advanced by Interdisciplinary Research and Engineering (RAISE) [\[Change\]](#) Submission Type: Full Proposal [\[Change\]](#)

**Proposal Actions**

- Allow SPO Access
- Check Proposal Compliance
- Print Proposal
- Delete Proposal

**Collaborative Proposal**  
Lead Proposal [\[Change\]](#)  
Link(s): Not linked  
Link Collaborative Proposals

**Personnel Access**  
**Your role:**  
Principal Investigator (PI)  
**1** other user(s) have access  
Manage Personnel

Proposal Sections	Last Updated	Compliance Status
<b>Required</b>		
<a href="#">Cover Sheet</a>		Not checked
<a href="#">Senior Personnel Documents</a> <span>i</span>		Not checked
<a href="#">Project Summary</a>		Not checked
<a href="#">Project Description</a>		Not checked
<a href="#">References Cited</a>		Not checked
<a href="#">Budgets</a>		Not checked
		Not checked
		Not checked
<a href="#">Data Management Plan</a>		Not checked
<a href="#">Collaboration Plan</a>		Not checked
<a href="#">Management Plan</a>		Not checked

- Proposal access is managed via a separate action



- After navigating from the proposal forms page, the PI may add Co-PIs, Sr Personnel, and OAUs (“assistants”) to the proposal
- Adding an individual to the proposal prompts an invitation to join the proposal process

## Manage Personnel

Filter by Name, Role or Organization

### Senior Personnel

Add Senior Personnel

Personnel Name	Role	Organization	Actions
Jane Smith	Principal Investigator	Brown University	<a href="#">Change Role</a>   <a href="#">Edit PI Profile</a>



### Assistant(s)

Add Assistant

No assistants have been added

- OAUs are not expected to utilize a proposal PIN to access proposals

- The PI will perform a search by user ID or email address
- Unlike today, Other Senior Personnel need to be registered with NSF before being added to a proposal

### Add Senior Personnel

What role will the Senior Personnel be on the proposal?

Co - Principal Investigator
  Other Senior Personnel

Search for Senior Personnel:

NSF ID  OR Email

### Add Senior Personnel

What role will the Senior Personnel be on the proposal?

Co - Principal Investigator
  Other Senior Personnel

Search for Senior Personnel:

NSF ID  OR Email

Select	Co-PI Name	NSF ID	Email	Organization
<input checked="" type="radio"/>	Samantha Jones	33333333	s*****@*****.edu	Brown University

- The user validates the individual's identity and formally adds her to the proposal



## Manage Personnel

Filter by Name, Role or Organization

### Senior Personnel

Add Senior Personnel

Personnel Name	Role	Organization	Actions
Jane Smith	Principal Investigator	Brown University	<a href="#">Change Role</a>   <a href="#">Edit PI Profile</a>
 Samantha Jones	Other Senior Personnel	Brown University	<a href="#">Change Role</a>   <a href="#">Remove from Proposal</a>

### Assistant(s)

Add Assistant

No assistants have been added



**From:** PSMemail@nsf.gov  
**Date:** August 3, 2016  
**Subject:** You have been added to a proposal

- The added individual may receive a notification that s/he has been added to a NSF proposal

Jane Smith has added you, in the role of Other Senior Personnel, to the following proposal:

**7654321 - Supporting Faculty in Quantitative Undergraduate Biology Education and Synthesis**

Please sign into Research.gov where the proposal will be available from your listing of In Progress proposals.

[Sign into Research.gov](#)

If you feel this request is in error, please click the link below to remove yourself from the proposal.

[Please remove me from this proposal](#)

- S/he may remove herself/himself from the proposal

## Proposal Preparation

What would you like to work on?

- The added Co-PI could be notified via an automatic alert and/or auto-generated email

### Create New Proposal

Get started by answering a few questions to enable NSF to customize your proposal interface and compliance rules.

**Create Proposal**

*i* What information will need to be provided?

### In Progress Proposals

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

**Work with In Progress Proposals**

3 In Progress Proposals are available

### Submitted Proposals

View, download or withdraw proposals that have previously been submitted to NSF.

**View Submitted Proposals**

0 Submitted Proposals are available

## Proposal Alerts

Alert	Date Posted	Actions
-------	-------------	---------



You have been added to proposal 7654321 - Supporting Faculty in Quantitative Undergraduate Biology Education and Synthesis, as Other Senior Personnel 7/25/2016

[View / Edit Proposal](#)  
[Decline Invitation](#)

- Similar to today, co-PIs and OAUs would continue to have full proposal access
- Other Senior Personnel would also have system access

## Proposal - 7654321

**Title:** Supporting Faculty in Quantitative Undergraduate Biology Education and Synthesis Save

**Funding Opportunity:** [NSF 16-505](#) - Faculty Early Career Development Program [\[Change\]](#)

**Where to Apply:** Biological Sciences (BIO) - Environmental Biology (DEB), Thermal Transport Processes [\[Change\]](#)

**Proposal Type:** Research Advanced by Interdisciplinary Research and Engineering (RAISE) [\[Change\]](#)      **Submission Type:** Full Proposal [\[Change\]](#)

### Proposal Actions

[Allow SPO Access](#)

[Check Proposal Compliance](#)

[Print Proposal](#)

[Delete Proposal](#)

### Collaborative Proposal

Lead Proposal [\[Change\]](#)

Link(s): Not linked

[Link Collaborative Proposals](#)

### Personnel Access

**Your role:**  
Principal Investigator (PI)

1 other user(s) have access

[Manage Personnel](#)

### Proposal Sections

Last Updated

Compliance Status

#### Required

[Cover Sheet](#)

[Senior Personnel Documents](#)

[Project Summary](#)

[Project Description](#)

[References Cited](#)

[Budgets](#)

[Budget Justification](#)

[Facilities, Equipment, and Other Resources](#)

[Data Management Plan](#)

[Collaboration Plan](#)

[Management Plan](#)

- Within this new section is a listing of all person-specific proposal documents





- This layout allows a singular view of all documents required for each named senior project personnel

## Senior Personnel Documents

Expand all | Collapse all  Manage Personnel

Personnel Name	Role	Organization
Jane Smith	Principal Investigator	Brown University
<b>Documents</b>		
	<b>Last Updated</b>	<b>Compliance Status</b>
Biographical Sketch		
Current & Pending	09/07/2016	Error(s)
Results from Prior NSF Support		
Collaborators & Other Affiliations	08/30/2016	No issues found
Samantha Jones	Other Senior Personnel	Brown University

- Results from Prior NSF Support has been separated from the Project Description

Check Compliance Preview / Print



# Proposal - 7654321

Title: Supporting Faculty in Quantitative Undergraduate Biology Education and Synthesis Save

Funding Opportunity: [NSF 16-505](#) - Faculty Early Career Development Program [\[Change\]](#)

Where to Apply: Biological Sciences (BIO) - Environmental Biology (DEB), Thermal Transport Processes [\[Change\]](#)

Proposal Type: Research Advanced by Interdisciplinary Research and Engineering (RAISE) [\[Change\]](#) Submission Type: Full Proposal [\[Change\]](#)



### Proposal Actions

[Allow SPO Access](#)

[Check Proposal Compliance](#)

[Print Proposal](#)

[Delete Proposal](#)

### Collaborative Proposal

Lead Proposal [\[Change\]](#)

Link(s): Not linked

[Link Collaborative Proposals](#)

### Personnel Access

Your role:  
Principal Investigator (PI)

1 other user(s) have access

[Manage Personnel](#)

Proposal Sections	Last Updated	Compliance Status
<b>Required</b>		
<a href="#">Cover Sheet</a>		Not checked
<a href="#">Senior Personnel Documents</a>		Not checked
<a href="#">Project Summary</a>		Not checked
<a href="#">Project Description</a>		Not checked
<a href="#">References Cited</a>		Not checked
<a href="#">Budgets</a>		Not checked
<a href="#">Budget Justification</a>		Not checked
<a href="#">Facilities, Equipment, and Other Resources</a>		Not checked
<a href="#">Data Management Plan</a>		Not checked
<a href="#">Collaboration Plan</a>		Not checked
<a href="#">Management Plan</a>		Not checked



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# Break-Out: Personnel

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# Budget and Budget Justification

People | Place | Technology  
Your Success is Our Success!

Administrative Services  
Human Resource Management  
Information Systems  
Chief Information Officer



# Proposal - 7654321

Title: Supporting Faculty in Quantitative Undergraduate Biology Education and Synthesis [\[Change\]](#)

Funding Opportunity: [NSF 16-505](#) - Faculty Early Career Development Program [\[Change\]](#)

Where to Apply: Biological Sciences (BIO) - Environmental Biology (DEB), Thermal Transport Processes [\[Change\]](#)

Proposal Type: Research Advanced by Interdisciplinary Research and Engineering (RAISE) [\[Change\]](#) SubmissionType: Full Proposal [\[Change\]](#)

### Proposal Actions

[Allow SPO Access](#)

[Check Proposal Compliance](#)

[Print Proposal](#)

[Delete Proposal](#)

### Collaborative Proposal

Lead Proposal [\[Change\]](#)

Link(s): Not linked

[Link Collaborative Proposals](#)

### Personnel Access

#### Your role:

Principal Investigator (PI)

3 other user(s) have access

[Manage Personnel](#)

Proposal Sections	Status	Last Updated	Compliance Status
<b>Required</b>			
<a href="#">Cover Sheet</a>	<input type="radio"/> Not started		Not checked
<a href="#">Senior Personnel Documents <span>i</span></a>	<input type="radio"/> Not started		Not checked
<a href="#">Project Summary</a>	<input type="radio"/> Not started		Not checked
<a href="#">Project Description</a>	<input type="radio"/> Not started		Not checked
<a href="#">References Cited</a>	<input type="radio"/> Not started		Not checked
<a href="#">Budgets</a>	<input type="radio"/> Not started		Not checked
<a href="#">Budget Justification</a>	<input type="radio"/> Not started		Not checked
<a href="#">Facilities, Equipment, and Other Resources</a>	<input type="radio"/> Not started		Not checked
<a href="#">Data Management Plan</a>	<input type="radio"/> Not started		Not checked
<a href="#">Collaboration Plan</a>	<input type="radio"/> Not started		Not checked
<a href="#">Management Plan</a>	<input type="radio"/> Not started		Not checked

- Budget and Budget Justification are separate sections in PSM

### Helpful Links

- Required
- Cover Sheet
- Personnel and Associated Documents
- Project Summary
- Project Description
- References Cited
- > Budgets
- Budget Justification
- Management Plan
- Conditionally Required
- Postdoctoral Mentoring Plan
- Deviation Authorization
- Optional
- Letters of Collaboration
- RUI Impact Statement
- Suggested Reviewer List

My Desktop > Proposal Preparation > Proposal - 7

## Budgets

For Organization 1 i

**\$ 73,800**  
Total Requested Amount

• The budget automatically displays Year 1. User may add additional years

Add Year

Expand all rows | Collapse all rows

Direct Costs	Year 1 Months   Funds	Total Funds Requested
<b>A. Senior Personnel</b> <span style="font-size: small;">i</span>		<b>\$ 50,000</b>
Jane Smith	12   \$ 20,000	\$ 20,000
Terri Demo	12   \$ 20,000	\$ 20,000
Helen Anderson	9   \$ 10,000	\$ 20,000
<b>B. Other Personnel</b>		<b>\$ 16,000</b>
<input type="text" value="1"/> Postdoctoral Scholars	12   \$ 12,000	\$ 12,000
<input type="text" value="0"/> Other Professionals	\$	\$ 0
<input type="text" value="2"/> Graduate Students	\$ 4,000	\$ 4,000
<input type="text" value="0"/> Undergraduate Students	\$	\$ 0
<input type="text" value="0"/> Secretarial - Clerical	\$	\$ 0
<input type="text" value="0"/> Other	\$	\$ 0
<b>C. Fringe Benefits</b>		<b>\$ 500</b>
	\$ 500	\$ 500
<b>Total Salaries, Wages &amp; Fringe Benefits (A-C)</b>	<b>\$ 66,500</b>	<b>\$ 66,500</b>
<b>D. Equipment (over \$5000)</b>		<b>\$ 5350</b>
<input type="text" value="1"/> Measuring instrument	\$ 5350	\$ 5350

• The concept of person-months has been streamlined

• This screenshot does not capture all line items, though they largely replicate FastLane.

## Budgets

For Organization 1

\$ 68,800

Total Requested Amount

Expand all | Collapse all

Add Year

Delete Year

### Direct Costs

#### Add Year

Add a new year to the budget by choosing a selection below.

##### Add New Year

Add blank year

Copy from existing year

Select year to copy

Year 1

Add Year

Close

- After choosing to add a year to the budget, the user chooses whether to copy prior year data.

#### B. Other Personnel

1 Postdo

0 Other P

2 Gradua

0 Undergraduate Students

0 Secretarial - Clerical

0 Other

#### C. Fringe Benefits

\$ 500

\$ 500

\$ 500

Total Salaries, Wages & Fringe Benefits (A-C)

\$ 66,500

\$ 66,500

#### D. Equipment

\$ 350

\$ 350

1 Measuring instrument

\$ 350

\$ 350



## Budgets

For Organization 1 ?

**\$ 147,600**  
Total Requested Amount

- The new budget can display all project years on one screen or filter to show select years.

Expand all rows | Collapse all rows

Show columns:  Year 1  Year 2

Add Year

Delete Year

Direct Costs	Year 1 Months   Funds	Year 2 Months   Funds	Total Funds Requested
<b>A. Senior Personnel</b> <span>?</span>	<b>\$ 50,000</b>	<b>\$ 50,000</b>	<b>\$ 100,000</b>
Jane Smith	12   \$ 20,000	12   \$ 20,000	\$ 40,000
Terri Demo	12   \$ 20,000	12   \$ 20,000	\$ 40,000
Helen Anderson	9   \$ 10,000	9   \$ 10,000	\$ 20,000
<b>B. Other Personnel</b>	<b>\$ 16,000</b>	<b>\$ 16,000</b>	<b>\$ 32,000</b>
1 <span>▼</span> Postdoctoral Scholars	12   \$ 12,000	12   \$ 12,000	\$ 24,000
0 <span>▼</span> Other Professionals	\$	\$	\$ 0
2 <span>▼</span> Graduate Students	\$ 4,000	\$ 4,000	\$ 8,000
0 <span>▼</span> Undergraduate Students	\$	\$	\$ 0
0 <span>▼</span> Secretarial - Clerical	\$	\$	\$ 0
0 <span>▼</span> Other	\$	\$	\$ 0
<b>C. Fringe Benefits</b>	<b>\$ 500</b>	<b>\$ 500</b>	<b>\$ 1000</b>
	\$ 500	\$ 500	
<b>Total Salaries, Wages &amp; Fringe Benefits (A-C)</b>	<b>\$ 66,500</b>	<b>\$ 66,500</b>	<b>\$ 133,000</b>
<b>D. Equipment (over \$5000)</b>	<b>\$ 5350</b>	<b>\$ 5350</b>	<b>\$ 10,700</b>
1. Measuring instruments	\$ 5350	\$ 5350	\$ 10,700
<a href="#">+ Add Equipment</a>			
<b>E. Travel</b>	<b>\$ 1000</b>	<b>\$ 1000</b>	<b>\$ 2000</b>

- Budget numbers are summed at the top-right box, far right column, and bottom of budget

- Budget data may be viewed at the category level or at a more detailed level

- NSF is exploring other methods of supporting the budget input - like a wizard

- After clicking on the budget, the user could be given the option of engaging a wizard of proceeding to the main input screen

**Get Started on the Budget**

Select the way you would like to enter your budget information. The guided option is recommended if this is your first time filling out the form. If you change your mind, it's easy to switch to the other view at any time.

Walk step-by-step through a guided questionnaire to enter your budget

**Guide Me**

Enter your budget information directly into the form.

**Go to Form**

Don't show this message again **Close**

Organization 3	1	\$ 0.00	--	Copy Year   Delete Year
<a href="#">+ Add Year</a>	2	\$ 0.00	--	Copy Year   Delete Year

Home > Proposal Management > Full Proposal - 7654321 > Budgets > Budget Year 1

## Budget Year 1

For Organization 1

Switch to Form View

**\$ 1200**  
Total Requested Amount



- At any time user could switch to a traditional form view

Personnel: Senior Personnel

There are currently 3 Senior Personnel listed for this proposal.

**Note:**  
If you need to add additional Senior Personnel, please go to the [Personnel](#) section.

- User is provided visual of budget progress

name	Job Title	Calendar Months	=	Academic Months	+	Summer Months	Funds Requested
Helen Anderson	<input type="text"/>	<input type="text"/>		<input type="text"/>		<input type="text"/>	\$ <input type="text"/>
Adam Jones	<input type="text"/>	<input type="text"/>		<input type="text"/>		<input type="text"/>	\$ <input type="text"/>
Derek Rogers	<input type="text"/>	<input type="text"/>		<input type="text"/>		<input type="text"/>	\$ <input type="text"/>

Home > Proposal Management > Full Proposal - 7654321 > Budgets > Budget Year 1

## Budget Year 1

For Organization 1

Switch to  
Form View

\$ 8,650  
Total Requested Amount



Other Direct Costs: Other Direct Costs

Enter the funds requested, if any, for the following:

Funds Requested	Description
<input type="text" value="\$"/>	Materials and Supplies <a href="#">?</a>
<input type="text" value="\$"/>	Publication Costs / Documentation / Distribution <a href="#">?</a>
<input type="text" value="\$"/>	Consultant Services <a href="#">?</a>
<input type="text" value="\$"/>	Computer (ADPE) Services <a href="#">?</a>
<input type="text" value="\$"/>	Subcontracts <a href="#">?</a>
<input type="text" value="\$"/>	Other <a href="#">?</a>

**Note:**  
The requested fund amount should be rounded to the nearest dollar.

• Integrated help features could define line items, link to guidance

Save    Check Budget    Preview / Print Budget    Previous    Next

Home > Proposal Management > Full Proposal - 7654321 > Budgets > Budget: Organization 1

## ★ Budget

For Organization 1

### Instructions to upload Budget:

- Only 1 document can be uploaded
- Accepted file types include: Excel documents, etc.
- Images and other media are not permitted

[Help with Budget](#)

 [Microsoft Excel template \(optional\)](#)

Browse for file to upload

[Browse ...](#)

- NSF could also support a spreadsheet or template upload
- The uploaded document could be processed and integrated into the table interface for final validation.

[Upload](#)

[Cancel](#)



## Budget Justification

For Organization 1

- The Budget Justification provides a visual reminder of the data saved in the Budget

Direct Costs	Year 1 Months	Funds	Year 2 Months	Funds	Total Funds Requested
<b>A. Senior Personnel</b>		<b>\$ 50,000</b>		<b>\$ 50,000</b>	<b>\$ 101,000</b>
Jane Smith	12	\$ 20,000	12	\$ 20,000	\$ 40,000
Terri Demo	12	\$ 20,000	12	\$ 20,000	\$ 40,000
Helen Anderson	9	\$ 10,000	9	\$ 10,000	\$ 20,000
Alex Roberts		\$ 0		\$ 1000	\$ 1000

- The visual is meant to remind users to provide a justification for each applicable budget category

Part time salary for three faculty members is requested to allow these personnel sufficient time to design and test the cell biologically focused modules and to coordinate the training workshop for fellow GGC faculty members and dissemination workshops (Objectives 1 and 4 and Dissemination Plan). The amount requested for each co-PI is 10% of the base salary for a mid-level Assistant Professor at Brown University. The co-PI will have the primary responsibility for designing and piloting the cell biologically focused modules, for workshop organization and coordination.

- Where a budget category includes a funds request, the user is required to provide text

<b>B. Other Personnel</b>		<b>\$ 16,000</b>		<b>\$ 16,000</b>	<b>\$ 32,000</b>
1 Postdoctoral Scholars	12	\$ 12,000	12	\$ 12,000	\$ 24,000
2 Graduate Students		\$ 4000		\$ 4000	\$ 4000

Part time salary is requested for 1 postdoctoral scholar and 2 graduate students to allow sufficient time to assist the other researchers with running the training and dissemination workshops. The postdoctoral scholar will take the lead on coordinating the recruitment, and marketing the workshop. While the graduate students will be engaged with tasks around setting up the workshop, and supporting the needs of the other researchers.



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# Break-Out: Budget / Budget Justification

People | Place | Technology  
Your Success is Our Success!

Administrative Services  
Human Resource Management  
Information Systems  
Chief Information Officer

## Next Steps

- Please fill out the short survey and hand it in before leaving
- To volunteer for future one-on-one usability testing, please let the moderators or me know
- To stay apprised of PSM activities, consider signing up for the NSF Electronic Records Forum.
  - Visit [https://www.nsf.gov/bfa/dias/policy/era\\_forum.jsp](https://www.nsf.gov/bfa/dias/policy/era_forum.jsp) for details.



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