NSF FastLane How-To

National Science Foundation
FastLane

- ♦ www.fastlane.nsf.gov

- ♦ www.fldev.nsf.gov   (Test Server)

- ♦ Register for NSF FastLane DSR / ERA / NSF FastLane - Register
  http://rgp.ufl.edu/research/

- ♦ Must be on NSF PI database to be a PI or Co-PI

- ♦ USER ASSISTANCE – check UF Fastlane Help list

- ♦ FastLane help desk **1-800-673-6188** or fastlane@nsf.gov

Completed Forms Required By DSR

♦ DSR-1 Signature Page

♦ Conflict of Interest Form(s)

♦ One Full Printed Copy of Completed Proposal
  • Original Signature(s) on Second Page of Cover Sheet

♦ IACUC or IRB Approval, if applicable & available

♦ CAS Justification Form, if applicable

♦ Cost Share Commitment letter, if applicable

NSF FastLane How-To

How to assign a PIN for a proposal kit (PI function):

♦ Hit the *Proposal Preparation or PI / CoPI Login* link on the NSF homepage.

♦ Select *Proposal Functions*.

♦ Select *Prepare Proposal*.

♦ Select the relevant Proposal kit number on the *Proposal Actions* screen.

♦ Click on the *Proposal PIN* button.

♦ Enter your four-digit ACCESS PIN twice.

♦ Click on the OK button.

♦ The assistant may now access the proposal.

How to log in on behalf of a PI for proposal preparation:

♦ At the FastLane Homepage, hit the link called *Other User Login*.

♦ As an assistant logging-in for the PI or Co-PI, you input the following:

   ♦ Your ss# as assistant to PI
   ♦ Your FastLane registration PIN as assistant to PI

   In addition, for the *Login for Other Authorized Users* enter:

   ♦ Proposal Kit number (7-digit no. for set of forms created by PI)
   ♦ Proposal access PIN (4 digit no. created by PI on *Proposal Actions* page)

NSF FastLane How-To

How to complete a cover sheet correctly:

♦ When the investigator logs in, a personal information page appears. He or she can check this info for accuracy and then select *Prepare Proposal*. Then, the PI will see a *Proposal Actions* screen where he or she can select an existing kit of forms (if available) and hit the *Edit* button. Or, if there are no forms, a new kit can be created by hitting the button called *Create Blank Proposal*. This action will assign a seven-digit number to a new set of forms called a "kit," and it will open the *Form Preparation* page of this kit for the user.

♦ *Edit* will bring the PI to the *Form Preparation* page. Note that the *Form Preparation* page is the <u>first</u> window that opens when an assistant uses the guest log-in (i.e., the proposal PIN assigned by PI plus the seven-digit kit number) to work on forms on behalf of a PI.

♦ Select *Go Cover Sheet* on the *Form Preparation* page. The complete cover page consists of three sections: (1) Awardee/Performing Organization Selection, (2) NSF Unit Consideration, and (3) Remainder of the Cover Sheet. All three of these areas must be completed.

♦ Hit *Go Awardee/ Performing Organization Selection* to access the first section of the cover sheet if you need to change the performing institution selection. The awardee organization should always be the University of Florida, and this should appear under the header called Awardee Organization. If it does not, add the University of Florida.

♦ Hit *Go NSF Unit Consideration* to specify the NSF unit that will receive the proposal. Note that this window allows you to select a program, division, and directorate for routing the proposal. The proposal must have at least <u>one</u> NSF unit identified. It is strongly preferred that two or three units are selected that will promote accurate routing of the proposal.

   ♦ Note: you will not be allowed to fill out the remainder of the Cover Sheet until at least one unit is selected.

♦ Hit *Go Remainder of the Cover Sheet.* Enter a program announcement if one applies. These are formatted like this: "NSF 99-01." Also, remember to enter the closing date.

   ♦ Keep in mind that program announcements can potentially cause the entire set of forms in the kit to change. It is very important to enter these at the beginning of the process.

NSF FastLane How-To

♦ The taxpayer ID number for UF = 596002052.

♦ The other parts of the Remainder of the Cover Sheet will require information concerning the proposal type, other federal agencies that the proposals is going to, proposed duration, the project title, and checkboxes pertaining to institutional certifications. Make sure every area of the form is complete.

♦ Also on the Remainder of the Cover Sheet, add Co-PIs and their social security numbers. Make sure these numbers are correct since deleting a social security number could possibly cause you to lose previously entered data (for example, a biosketch) on that person.

♦ Hit *OK* to save information. The *Go Back* button will enable you to return to the *Form Preparation* page, but it will not save data input.

NSF FastLane How-To

How to complete a budget page:

♦ Select *Go Budgets* on the *Form Preparation* menu.

♦ In the Institution Selector window, make sure the University of Florida is highlighted and hit the *Use* button to create a budget page for this project at U. F.

♦ On the right side of the window, click on the budget year you wish to create and hit *Create*.

♦ ***Warning***! When you enter dollar amounts on the budget enter only numbers and NO commas. Digits after the comma will be LOST!

♦ Enter budget information section by section as it is requested. Remember that there are four separate areas online that must be completed: Senior Personnel, Other Personnel, Equipment, and Indirect Costs.

♦ Caution: Indirect Costs are not totaled until you enter the Rate and Base information. To determine the base, one must deduct any portion of the budget that is not subject to the indirect cost rate.

♦ With the awardee institution or primary budget page, be sure to enter any subcontract budget amounts under the Other Personnel section in the subsection called Other Direct Costs. If multiple subcontracts apply, then this number is the total.

♦ Hit the calculate buttons to enter subtotals on the form.

♦ VERY IMPORTANT: Hit the save button at the bottom of each of the four sections. This will save what you entered.

♦ When the budget year you are working on is complete, then hitting the *Go Back* button at the bottom will enable you to go to other forms or create another budget year.

♦ FastLane creates the cumulative budget for you. You can view all budgets including the cumulative one by choosing the *Print* function and selecting the budget form.

♦ If you want to see the entire budget page as a whole unit, it is necessary to print the budget in the print menu. Hit *Print* in the vertical navigation bar (available from the

NSF FastLane How-To

Form Preparation window). Before the budget page prints, a copy of it will load within Adobe Acrobat if this program is configured correctly on your computer.

How to add or delete non PI/co-PI senior personnel:

♦ Select *Add/Delete Non Co-PI Senior Personnel* on the *Form Preparation* menu.

To Add:

♦ Enter First Name, MI, and Last Name:

♦ Hit the *Add Non Co-Pi Senior Person to Proposal* button.

♦ Name will now appear in the Non Co-PI Senior Personnel Assigned to Proposal box.

♦ When you are finished adding personnel, hit the *Go Back* button to return to the *Form Preparation* page.

♦ Go to the Biosketch form. The name you entered has been added, and he or she will now able to upload a biosketch.

To Delete:

♦ To delete a person from the list, select them in the box called Non Co-PI Senior Personnel Assigned to the Proposal, and hit the *Delete* button.

NOTE: the addition or deletion of persons in the Non PI/Co-PI Senior Personnel List also affects the Budget form and the Current and Pending Support form.

NSF FastLane How-To

How to add a subcontract to the proposal:

◆ **NOTE:** These following items must be complete BEFORE adding a subcontract:
   ◆ Add Subcontract PI as a Non Co-PI Senior Personnel.
   ◆ Subcontract PI will need to have his/her Biographical Information listed on the Biographical Sketches Form.

◆ Go to the *Form Preparation* menu.

◆ Select *Go Budgets*.

◆ Select *Add New Org*.

◆ Type the name of the organization in the locator box and hit *Locate*. If the organization is not listed, then it will need to be registered with NSF FastLane. (See how to register a company or institution in the index to this guide.)

◆ Highlight the organization and hit *Select*.

◆ Select the *Use* button on the Institutional Selector screen to create or modify the subcontract budget.

◆ Select the budget year to be edited.

◆ Go to Senior Personnel, section A, and hit *Add Senior Person* to choose the subcontract PI.

◆ Have Subcontract PI print and sign subcontract budget.

◆ Forward original signatures to UF.

◆ Go to the PI's awardee institution budget (primary budget) and add the Subcontract amount to the field in Other Direct Costs called *Subcontracts*.

NSF FastLane How-To

<u>How to register a company or institution in FastLane:</u>

♦ Subcontracts must be registered FastLane users.

♦ From the FastLane home page, select *Registration Information* from the FastLane Information menu.

♦ Read the *Registration Information* page.

♦ Select *Printable Registration Form.*

♦ Complete form and mail to NSF address provided.

♦ Noninstitutional companies register at this site, also. FastLane is in the process of changing titles from Institution to Company.

NSF FastLane How-To

How to complete the Current and Pending Support Form

♦ From the FastLane home page, select *Proposal Preparation*.

♦ Login and hit *Proposal Preparation.* On the PI information page, hit *Prepare Proposal.*

♦ On the *Proposal Actions* page, either select a proposal and hit *Edit* or hit *Create Blank Proposal.*

♦ On the *Form Preparation* page of the kit you have selected, go to form called *Current and Pending Support.*

♦ Select *New Form* to add each individual person.

♦ NOTE: You must select *New Form* each time for each person. Selecting *New Form* will not delete the previous persons added.

  ♦ *Persons-months Per Year* is time spent on the project.
  ♦ Individuals do not have to be receiving salaries on the project.
  ♦ NSF discourages listing support that is zero in time.
  ♦ The field called *Person-Months-Per-Year* requires that the time amount be equal to or greater than 1 or .01 since an error message will occur if zero is entered.

NSF FastLane How-To

How to access the permanent Proposal PIN number (post-submission project identifying number).

♦ The PI can select *View Submitted* proposals in his or her *Proposal Actions* menu. Assistants who log in on behalf of a PI with a kit number and proposal access PIN cannot view the *Proposal Actions* menu.

♦ Select a submitted proposal.

♦ The number on the left is the FastLane Assigned Proposal #.