



H E L P   D O C U M E N T A T I O N

## FastLane Help System

### Prepare a Proposal Functions



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## **Prepare a Proposal Functions**

### **Proposal Functions Introduction**

You have these options for working on proposals:

- Create a new proposal
- Create a template for a proposal
- Create a new proposal from a template
- Edit a proposal
- Assign a PIN to a proposal
- Check a proposal for completeness
- Allow or Remove SPO access to a proposal
- Copy a submitted proposal
- Delete a proposal template

## Create a New Proposal

1. On the **FastLane Home Page** screen, log in to Proposals, Awards, and Status as a PI (see [PI/Co-PI Login](#)). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management** screen displays (Figure 1).

### Principal Investigator(PI)/Co-Principal Investigator(Co-PI) Management

What Do You Want To Work On?

- [Proposal Functions](#)
- [Award And Reporting Functions](#)
- [Change PI Information](#)

**Figure 1** Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management screen. The Proposal Functions link is circled.

2. Click **Proposal Functions** (Figure 1). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Proposal Functions** screen displays (Figure 2).

### Principal Investigator(PI)/Co-Principal Investigator(Co-PI) Management

Proposal Functions

- [Letters of Intent](#)
- [Proposal Preparation](#)
- [Proposal Status](#)
- [Revise Submitted Proposal Budget](#)
- [Proposal File Update](#)

**Figure 2** Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Proposal Functions screen. The Proposal Preparation link is circled.

- Click **Proposal Preparation** (Figure 2). The **Principal Investigator (PI) Information** screen displays (Figure 3).

### Principal Investigator (PI) Information

Notice: In the January 2002 Grant Proposal Guide (GPG), NSF published revised proposal preparation guidelines. Review the latest [Project Summary Section of the Grant Proposal Guide \(opens new window\)](#) and [Project Description Section of the Grant Proposal Guide \(opens new window\)](#) for more information. PIs were instructed that they must address both merit review criteria in the preparation of proposals submitted to NSF. The GPG now reflects that proposers must clearly address, in separate statements within the one-page limitation, both of the NSF merit review criteria in the Project Summary. The GPG also reiterates that broader impacts resulting from the proposed project must be addressed in the Project Description and described as an integral part of the narrative.

Examples illustrating activities likely to demonstrate broader impacts are available electronically on the NSF website at: [http://www.nsf.gov/pubs/2004/nsf04136examples.pdf \(opens new window\)](http://www.nsf.gov/pubs/2004/nsf04136examples.pdf).

These changes should be carefully considered by PIs when preparing proposals for submission to NSF. Effective October 1, 2002, proposals that do not address the two merit review criteria in separate statements in the project summary will be returned without review.

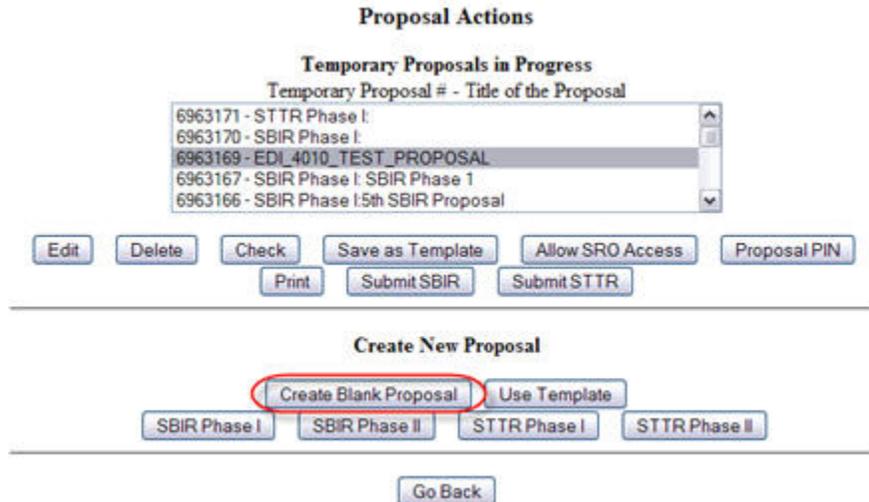
Edit PI Information   Prepare Proposal   View Submitted  
Go Back

Name	Terry Demo	
Organization	NSF 4102852000	
Department	Division of Information Systems	
Address	4201 Wilson Boulevard Arlington, VA 22230	Phone (703) 292-1000 Fax (703) 292-3000 EMail <a href="mailto:tdemo@nsf.gov">tdemo@nsf.gov</a>
Country	US	
Gender	Do not wish to provide	
Citizenship	Do not wish to provide	Degree Year 2004
Ethnicity	Do not wish to provide	Degree PhD
Disability Status		
Race	White	
Serving or ever served on a Federally Funded Project as a PI or Co-PI -	No	

Edit PI Information   Prepare Proposal   View Submitted

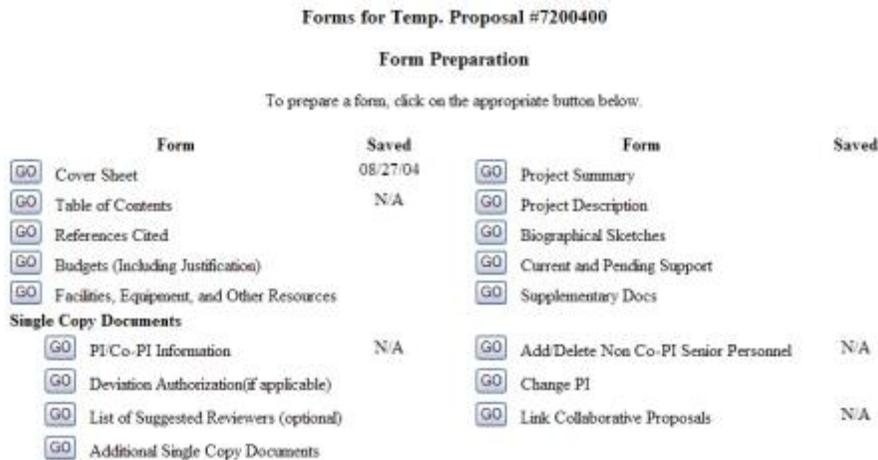
**Figure 3 Principal Investigator (PI) Information screen. The Prepare Proposal buttons are circled.**

- Click either one of the **Prepare Proposal** buttons (Figure 3). The **Proposal Actions** screen displays (Figure 4).



**Figure 4 Proposal Actions screen. The Create Blank Proposal button is circled.**

5. Click the **Create Blank Proposal** button (Figure 4). The **Form Preparation** screen displays (Figure 5). See [Prepare Proposal Forms](#) for instructions on how to work on all the proposal forms on the **Form Preparation** screen.



**Figure 5 Form Preparation screen.**

See also:

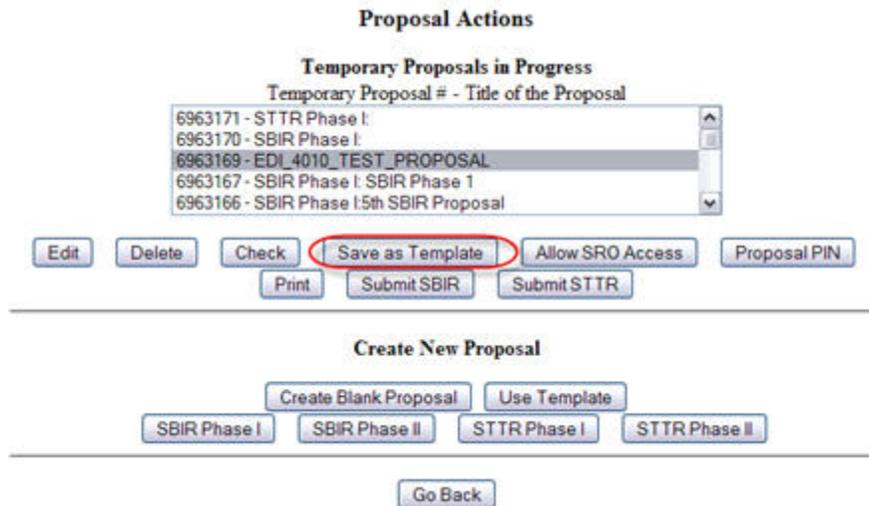
- Prepare proposal forms
- Create a template for a proposal
- Create a new proposal from a template
- Edit a proposal
- Assign a PIN to a proposal
- Check a proposal for completeness
- Allow or Remove SPO access to a proposal
- Copy a submitted proposal
- Delete a proposal template

Prepare a Proposal Functions

## Create a Template for a Proposal

Once you have created a new proposal, you can save the proposal as a template for use in creating proposals in the future.

1. Access the **Proposal Actions** screen (Figure 1) (see Steps 1 through 4 of [Create a New Proposal](#) or of [Edit a Proposal](#)).



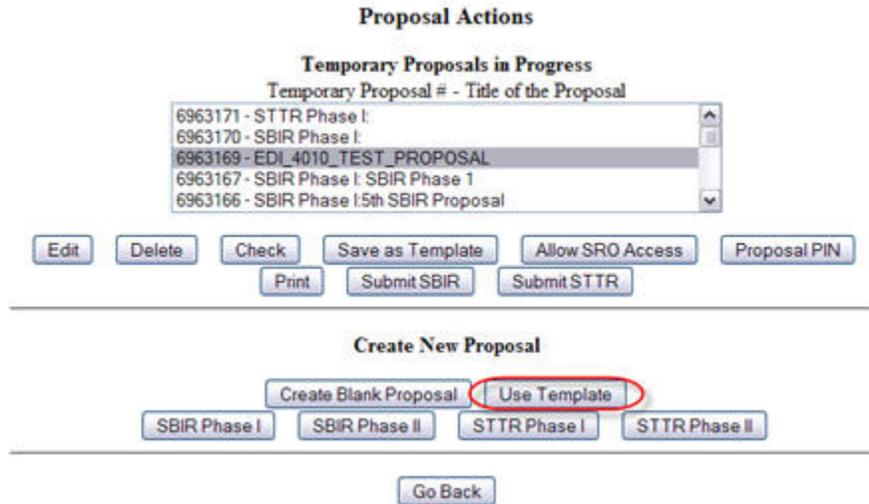
**Figure 1 Proposal Actions screen. The Save as Template button is circled.**

2. Highlight the proposal you want to save as a template from the **Temporary Proposals in Progress** list (Figure 1).
3. Click the **Save as Template** button (Figure 1). The **Template Proposal Has Been Created** screen displays (Figure 2) with the message that a template has been created from the proposal.

Template Proposal T000352 has been created.

**Figure 2 Template Proposal Has Been Created screen.**

4. Click the **OK** button (Figure 2). The **Proposal Actions** screen displays (Figure 3).



**Figure 3 Proposal Actions screen. The Use Template button is circled.**

5. Click the **Use Template** button (Figure 3) to find the template. The **Template Proposals** screen displays (Figure 4). The template that you created from the proposal is now in the **Current Templates** list.



**Figure 4 Template Proposals screen with the template (circled) you created from the proposal in the Current Templates list.**

See also:

- Prepare proposal forms
- Create a new proposal
- Create a new proposal from a template
- Edit a proposal
- Assign a PIN to a proposal
- Check a proposal for completeness
- Allow or Remove SPO access to a proposal
- Copy a submitted proposal
- Delete a proposal template

## Create a New Proposal from a Template

1. On the **FastLane Home Page** screen, log in to Proposals, Awards, and Status as a PI (see [PI/Co-PI Login](#)). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management** screen displays (Figure 1).

### Principal Investigator(PI)/Co-Principal Investigator(Co-PI) Management

What Do You Want To Work On?

- [Proposal Functions](#)
- [Award And Reporting Functions](#)
- [Change PI Information](#)

**Figure 1** Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management screen. The Proposal Functions link is circled.

2. Click **Proposal Functions** (Figure 1).The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Proposal Functions** screen displays (Figure 2).

### Principal Investigator(PI)/Co-Principal Investigator(Co-PI) Management

Proposal Functions

- [Letters of Intent](#)
- [Proposal Preparation](#)
- [Proposal Status](#)
- [Revise Submitted Proposal Budget](#)
- [Proposal File Update](#)

**Figure 2** Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Proposal Functions screen. The Proposal Preparation link is circled.

3. Click **Proposal Preparation** (Figure 2). The **Principal Investigator (PI) Information** screen displays (Figure 3).

## Principal Investigator (PI) Information

Notice: In the January 2002 *Grant Proposal Guide* (GPG), NSF published revised proposal preparation guidelines. Review the latest [Project Summary Section of the Grant Proposal Guide \(opens new window\)](#) and [Project Description Section of the Grant Proposal Guide \(opens new window\)](#) for more information. PIs were instructed that they must address both merit review criteria in the preparation of proposals submitted to NSF. The GPG now reflects that proposers must clearly address, in separate statements within the one-page limitation, both of the NSF merit review criteria in the Project Summary. The GPG also reiterates that broader impacts resulting from the proposed project must be addressed in the Project Description and described as an integral part of the narrative.

Examples illustrating activities likely to demonstrate broader impacts are available electronically on the NSF website at: [http://www.nsf.gov/pubs/2004/nsf042/boxesamples.pdf \(opens new window\)](http://www.nsf.gov/pubs/2004/nsf042/boxesamples.pdf).

These changes should be carefully considered by PIs when preparing proposals for submission to NSF. Effective October 1, 2002, proposals that do not address the two merit review criteria in separate statements in the project summary will be returned without review.

<input type="button" value="Edit PI Information"/>	<input type="button" value="Prepare Proposal"/>	<input type="button" value="View Submitted"/>
<input type="button" value="Go Back"/>		

Name	Terry Demo		
Organization	NSF 4102852000		
Department	Division of Information Systems		
Address	4201 Wilson Boulevard Arlington, VA 22230	Phone	(703) 292-1000
		Fax	(703) 292-3000
		E-Mail	tdemo@nsf.gov
Country	US		
<hr/>			
Gender	Do not wish to provide		
Citizenship	Do not wish to provide	Degree Year	2004
Ethnicity	Do not wish to provide	Degree	PhD
Disability Status			
Race	White		
Serving or ever served on a Federally Funded Project as a PI or Co-PI -	No		

<input type="button" value="Edit PI Information"/>	<input type="button" value="Prepare Proposal"/>	<input type="button" value="View Submitted"/>
--	---	---

**Figure 3 Principal Investigator (PI) Information screen. The Prepare Proposal buttons are circled.**

4. Click either one of the **Prepare Proposal** buttons (Figure 3). The **Proposal Actions** screen displays (Figure 4).

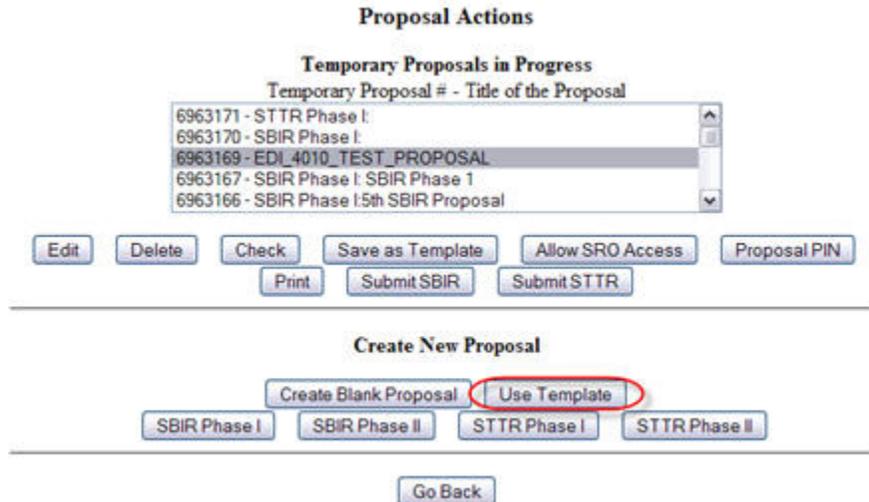


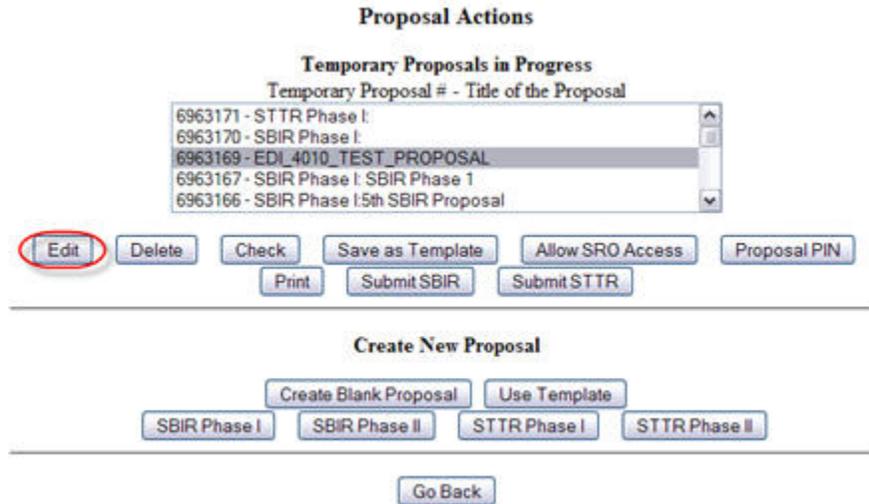
Figure 4 Proposal Actions screen. The Use Template button is circled.

5. Click the **Use Template** button (Figure 4). The **Template Proposals** screen displays (Figure 5).



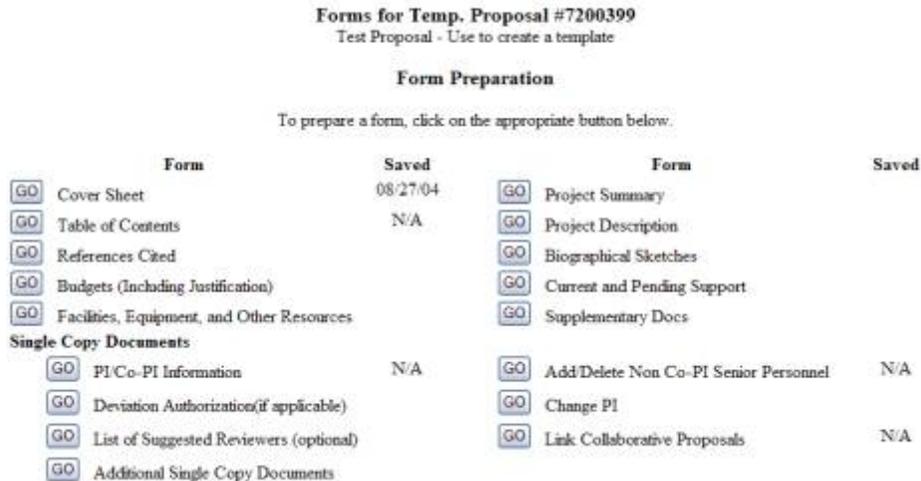
Figure 5 Template Proposals screen. The Use button is circled.

6. Highlight a template in the **Current Templates** list (Figure 5).
7. Click the **Use** button (Figure 5). The **Proposal Actions** screen displays (Figure 6) with the template now listed as a proposal in the **Temporary Proposals in Progress** list.



**Figure 6 Proposal Actions screen with the template now appearing in the list of Temporary Proposals in Progress. The Edit button is circled.**

8. Highlight the proposal in the **Temporary Proposals in Progress** list (Figure 6).
9. Click the **Edit** button (Figure 6). The **Form Preparation** screen for that proposal displays (Figure 7).



**Figure 7 Form Preparation screen for the proposal that you selected as a template.**

10. Edit the proposal as you require. See [Prepare Proposal Forms](#) for instructions on completing all the proposal forms on the **Form Preparation** screen (Figure 7).

See also:

- Prepare proposal forms
- Create a new proposal
- Create a template for a proposal
- Edit a proposal

## pd\_prepare\_proposal\_functions

- Assign a PIN to a proposal
- Check a proposal for completeness
- Allow or Remove SPO access to a proposal
- Copy a submitted proposal
- Delete a proposal template

## Edit a Proposal

1. On the **FastLane Home Page** screen, log in to Proposals, Awards, and Status as a PI (see [PI/Co-PI Login](#)). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management** screen displays (Figure 1).

### Principal Investigator(PI)/Co-Principal Investigator(Co-PI) Management

What Do You Want To Work On?

- ▶ [Proposal Functions](#)
- ▶ [Award And Reporting Functions](#)
- ▶ [Change PI Information](#)

**Figure 1** Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management screen. The Proposal Functions link is circled.

2. Click **Proposal Functions** (Figure 1). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Proposal Functions** screen displays (Figure 2).

### Principal Investigator(PI)/Co-Principal Investigator(Co-PI) Management

#### Proposal Functions

- ▶ [Letters of Intent](#)
- ▶ [Proposal Preparation](#)
- ▶ [Proposal Status](#)
- ▶ [Revise Submitted Proposal Budget](#)
- ▶ [Proposal File Update](#)

**Figure 2** Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Proposal Functions screen. The Proposal Preparation link is circled.

3. Click **Proposal Preparation** (Figure 2). The **Principal Investigator (PI) Information** screen displays (Figure 3).

## Principal Investigator (PI) Information

**Notice:** In the January 2002 *Grant Proposal Guide (GPG)*, NSF published revised proposal preparation guidelines. Review the latest [Project Summary Section of the Grant Proposal Guide \(opens new window\)](#) and [Project Description Section of the Grant Proposal Guide \(opens new window\)](#) for more information. PIs were instructed that they must address both merit review criteria in the preparation of proposals submitted to NSF. The GPG now reflects that proposers must clearly address, in separate statements within the one-page limitation, both of the NSF merit review criteria in the Project Summary. The GPG also reiterates that broader impacts resulting from the proposed project must be addressed in the Project Description and described as an integral part of the narrative.

Examples illustrating activities likely to demonstrate broader impacts are available electronically on the NSF website at: [http://www.nsf.gov/pubs/2004/nsf04/bic-examples.pdf \(opens new window\)](http://www.nsf.gov/pubs/2004/nsf04/bic-examples.pdf)

These changes should be carefully considered by PIs when preparing proposals for submission to NSF. Effective October 1, 2002, proposals that do not address the two merit review criteria in separate statements in the project summary will be returned without review.

Name	Terry Demo		
Organization	NSF 4102852000		
Department	Division of Information Systems		
Address	4201 Wilson Boulevard Arlington, VA 22230	Phone	(703) 292-1000
		Fax	(703) 292-3000
		EMail	tdemo@nsf.gov
Country	US		
Gender	Do not wish to provide		
Citizenship	Do not wish to provide	Degree Year	2004
Ethnicity	Do not wish to provide	Degree	PhD
Disability Status			
Race	White		
Serving or ever served on a Federally Funded Project as a PI or Co-PI.	No		

**Figure 3 Principal Investigator (PI) Information screen. The Prepare Proposal buttons are circled.**

- Click either one of the **Prepare Proposal** buttons (Figure 3). The **Proposal Actions** screen displays (Figure 4).

### Proposal Actions

**Temporary Proposals in Progress**

Temporary Proposal # - Title of the Proposal

6963171 - STTR Phase I	▲
6963170 - SBIR Phase I	▼
6963169 - EDI_4010_TEST_PROPOSAL	
6963167 - SBIR Phase I: SBIR Phase 1	
6963166 - SBIR Phase I: 5th SBIR Proposal	▼

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### Create New Proposal

**Figure 4 Proposal Actions screen. The Edit button is circled.**

5. Highlight the proposal you want to edit from the **Temporary Proposals in Progress** list (Figure 4).
6. Click the **Edit** button (Figure 4). The **Form Preparation** screen displays (Figure 5) for that proposal. See [Prepare Proposal Forms](#) for instructions on how to work on all the forms on the **Form Preparation** screen.

**Forms for Temp. Proposal #7200395**  
GPG Testing AGAIN

**Form Preparation**

To prepare a form, click on the appropriate button below.

Form	Saved		Form	Saved
<input type="button" value="GO"/> Cover Sheet	08/26/04		<input type="button" value="GO"/> Project Summary	
<input type="button" value="GO"/> Table of Contents	N/A		<input type="button" value="GO"/> Project Description	
<input type="button" value="GO"/> References Cited			<input type="button" value="GO"/> Biographical Sketches	
<input type="button" value="GO"/> Budgets (Including Justification)			<input type="button" value="GO"/> Current and Pending Support	
<input type="button" value="GO"/> Facilities, Equipment, and Other Resources			<input type="button" value="GO"/> Supplementary Docs	
<input type="button" value="GO"/> Proposal Classification				
<b>Single Copy Documents</b>				
<input type="button" value="GO"/> PI/Co-PI Information	N/A		<input type="button" value="GO"/> Add/Delete Non Co-PI Senior Personnel	N/A
<input type="button" value="GO"/> Deviation Authorization(if applicable)			<input type="button" value="GO"/> Change PI	
<input type="button" value="GO"/> List of Suggested Reviewers (optional)			<input type="button" value="GO"/> Link Collaborative Proposals	N/A
<input type="button" value="GO"/> Additional Single Copy Documents				

**Figure 5 Form Preparation screen for the proposal you have selected to edit.**

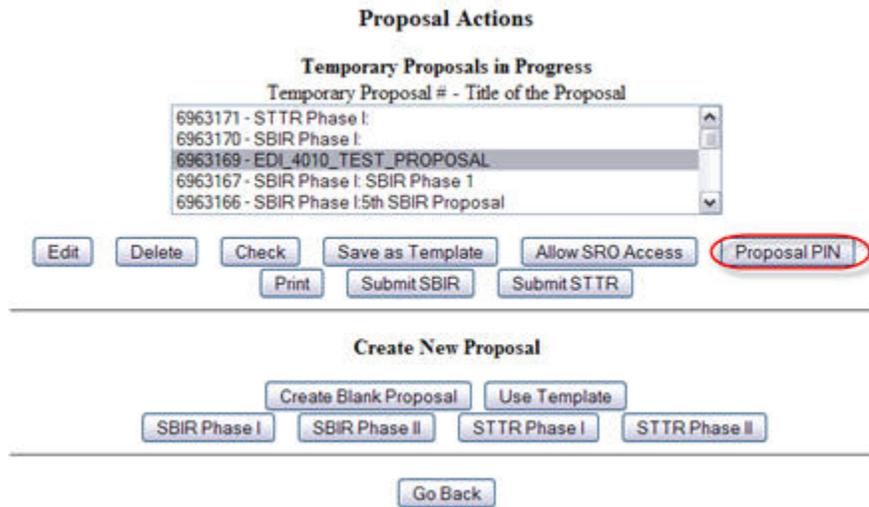
See also:

- Create a new proposal
- Create a template for a proposal
- Create a new proposal from a template
- Assign a PIN to a proposal
- Check a proposal for completeness
- Allow or Remove SPO access to a proposal
- Copy a submitted proposal
- Delete a proposal template

## Assign a PIN to a Proposal

You can assign a Personal Identification Number (PIN) to a proposal. An Other Authorized User (OAU), who is not a PI or Co-PI, needs a proposal's PIN to log in to Proposals, Awards, and Status and work on the proposal (see [OAU Login](#)).

1. Access the **Proposal Actions** screen (Figure 1) (see Steps 1 through 4 of [Create a New Proposal](#), [Edit a Proposal](#), or [Create a New Proposal from a Template](#)).



**Figure 1 Proposal Actions screen. The Proposal PIN button is circled.**

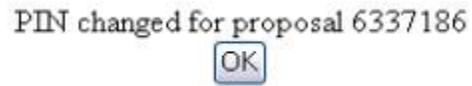
2. In the **Temporary Proposals in Progress** list (Figure 1), highlight the proposal that you want to assign a PIN to.
3. Click the **Proposal PIN** button (Figure 1). The **Proposal PIN Control** screen displays (Figure 2) for that proposal.



**Figure 2 Proposal PIN Control screen.**

4. Type the PIN in the boxes provided (Figure 2).

5. Click the **OK** button (Figure 2). The **PIN Changed for Proposal** screen displays (Figure 3).



**Figure 3 PIN Changed for Proposal screen.**

6. Click the **OK** button (Figure 3). The **Proposal Actions** screen displays (Figure 1).

See also:

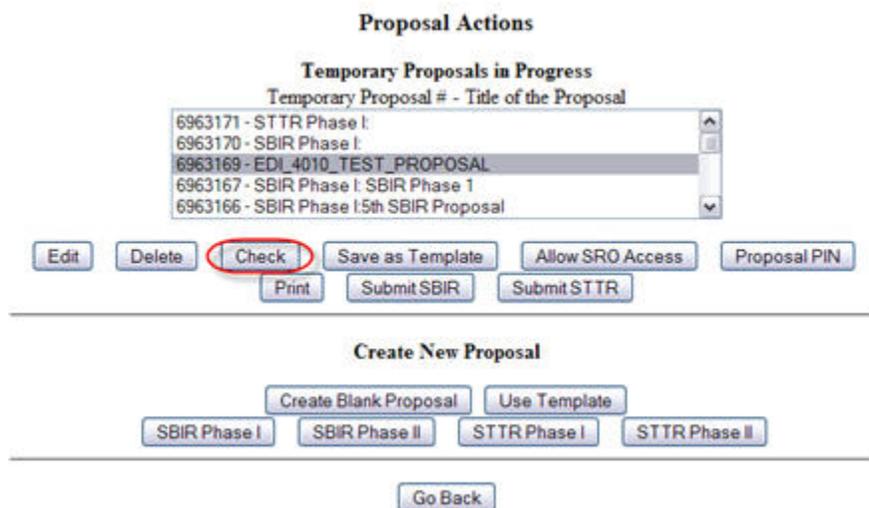
- Create a new proposal
- Create a template for a proposal
- Create a new proposal from a template
- Edit a proposal
- Check a proposal for completeness
- Allow or Remove SPO access to a proposal
- Copy a submitted proposal
- Delete a proposal template

## Check a Proposal for Completeness

You can check the progress of a proposal's preparation through the **Check** function. This is especially helpful if numbers of peoples—Co-PIs and Other Authorized Users—are working on the proposal.

The results tell you what documents are missing and which of those missing documents are required for NSF consideration of the proposal.

1. Access the **Proposal Actions** screen (Figure 1) (see Steps 1 through 4 of [Create a New Proposal](#) or of [Edit a Proposal](#)).



**Figure 1 Proposal Actions screen. The Check button is circled.**

2. Highlight the proposal that you want to check from the **Temporary Proposals in Progress** list (Figure 1).
3. Click the **Check** button (Figure 1).
4. The **Proposal Check Status** screen displays (Figure 2) with a list of those proposal forms that have not yet been filled out. Those forms that NSF requires for submission are marked with a red asterisk.

**PROPOSAL CHECK STATUS**

*Note: An asterisk (\*) indicates that the item listed will prevent submission*

<b>General Proposal Section</b>	
<b>Description</b>	
	The Proposal Classification Form has not been filled out (*)
	The Project Description form has not been filled out
	The Budget Justification for the Awarding Institution has not been filled out {
<b>PDF Section</b>	
<b>Description</b>	
	PDF files (if any) verified as PDF compliant.
<b>Cover Sheet Section</b>	
<b>Description</b>	
	Cover Sheet passed.
<b>Current and Pending Support Section</b>	
<b>Description</b>	
	Persons for whom there is no current and pending support form:
	Alan Alphaman
	Detail of current and pending support forms passed.

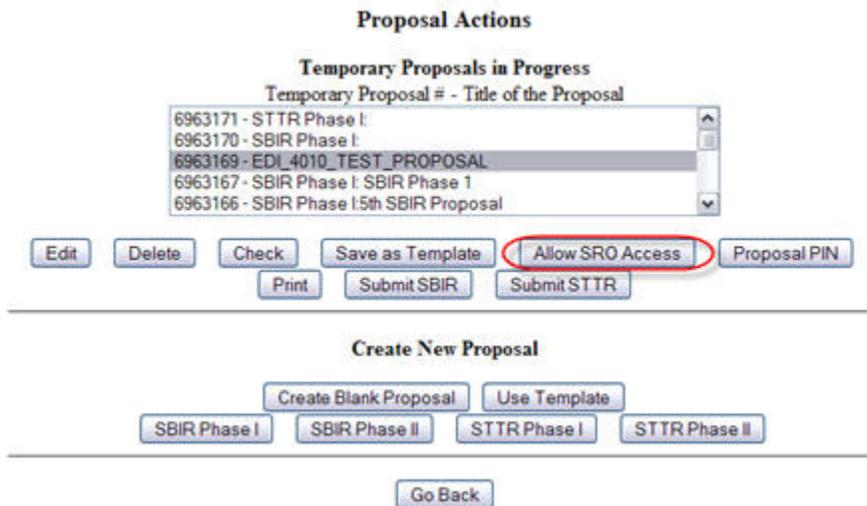
**Figure 2 Proposal Check Status screen.**

- Create a new proposal
- Create a template for a proposal
- Create a new proposal from a template
- Edit a proposal
- Assign a PIN to a proposal
- Allow or Remove SPO access to a proposal
- Copy a submitted proposal
- Delete a proposal template

## Allow or Remove SPO Access to Proposal

### Allow or Remove Sponsored Project Office (SPO) Access to a Proposal

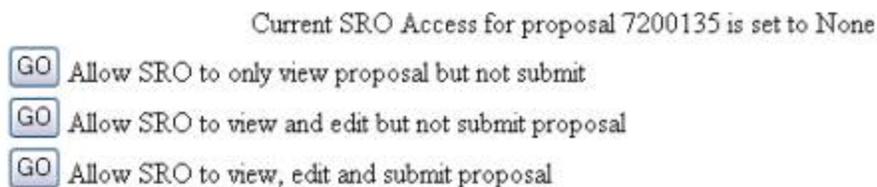
1. Access the **Proposal Actions** screen (Figure 1) (see Steps 1 through 4 of [Create a New Proposal](#) or of [Edit a Proposal](#)).



**Figure 1 Proposal Actions screen. The Allow SPO Access button is circled.**

2. Highlight the proposal you want to give the SPO access to in the **Temporary Proposals in Progress** list (Figure 1).
3. Click the **Allow SPO Access** button (Figure 1). The **Sponsored Project Office (SPO) Access Control** screen displays (Figure 2) with these control options:
  - [Allow SPO to only view proposal but not submit](#)
  - [Allow SPO to view and edit but not submit proposal](#)
  - [Allow SPO to view, edit, and submit proposal](#)

### Sponsored Research Office (SRO) Access Control



**Figure 2 Sponsored Project Office (SPO) Access Control screen.**

*If the SPO already has access to a proposal, the **Sponsored Project Office (SPO) Access Control** screen displays as in Figure 3 with these options:*

- [Allow SPO to only view proposal but not submit](#)

- Allow SPO to view and edit but not submit proposal
- Remove all SPO access to this proposal

### **Sponsored Research Office (SRO) Access Control**

Current SRO Access for proposal 7200135 is set to Edit and View

- Allow SRO to only view proposal but not submit
- Allow SRO to view, edit and submit proposal
- Remove all SRO access to this proposal

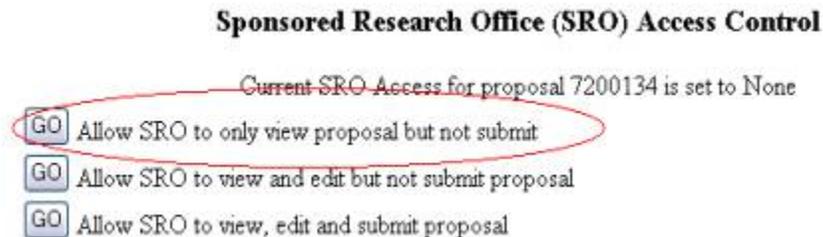
**Figure 3 Sponsored Research Office (SPO) Access Control screen if the SPO already has access to the proposal.**

See also:

- Create a new proposal
- Create a template for a proposal
- Create a new proposal from a template
- Edit a proposal
- Assign a PIN to a proposal
- Check a proposal for completeness
- Copy a submitted proposal
- Delete a proposal template

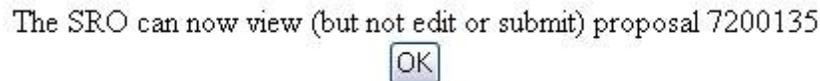
## Allow Sponsored Project Office (SPO) to Only View a Proposal But Not Submit

1. Access the **Sponsored Project Office (SPO) Access Control** screen (Figure 1) (see [Allow or Remove SPO Access to a Proposal](#)).



**Figure 1 Sponsored Project Office (SPO) Access Control screen. The Go button for Allow SPO to Only View Proposal But Not Submit is circled.**

2. Click the **Go** button for Allow SPO to Only View Proposal But Not Submit (Figure 1). A screen displays (Figure 2) with a message that the SPO can now view but not edit or submit the proposal.



**Figure 2 Screen with the message that the SPO can now view but not edit or submit the proposal.**

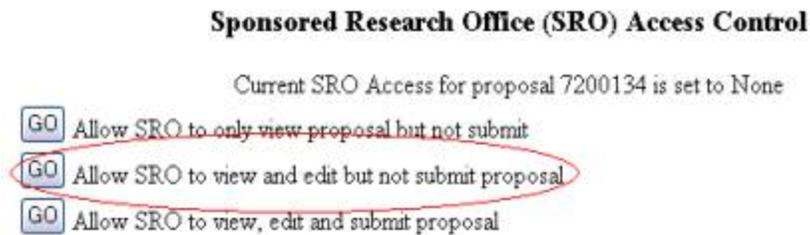
3. Click the **OK** button (Figure 2). The **Proposal Actions** screen displays.

See also:

- Allow SPO to view, edit, and submit a proposal
- [Allow SPO to view and edit but not submit proposal](#)
- [Remove all SPO access to this proposal](#)

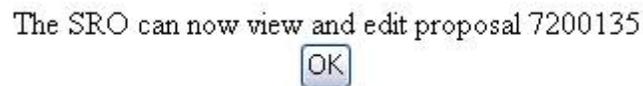
## Allow Sponsored Project Office (SPO) to View and Edit But Not Submit a Proposal

1. Access the **Sponsored Project Office (SPO) Access Control** screen (Figure 1) (see [Allow or Remove SPO Access to a Proposal](#)).



**Figure 1 Sponsored Research Office (SPO) Access Control screen with the Go button for Allow SPO to View and Edit But Not Submit Proposal circled.**

2. Click the **Go** button for Allow SPO to View and Edit But Not Submit Proposal (Figure 1). A screen displays (Figure 2) with a message that the SPO can now view and edit but not submit the proposal.



**Figure 2 Screen with the message that the SPO can now view and edit the proposal.**

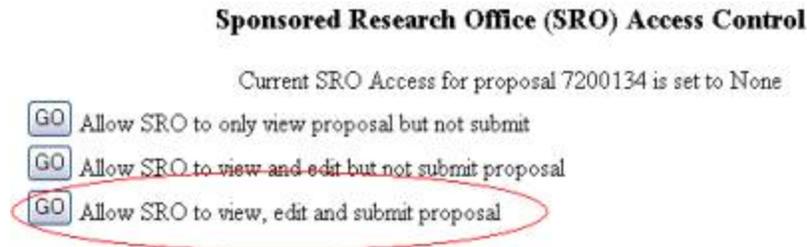
3. Click the **OK** button (Figure 2). The **Proposal Actions** screen displays.

See also:

- [Allow SPO to only view proposal but not submit](#)
- [Allow SPO to view, edit, and submit proposal](#)
- [Remove all SPO access to this proposal](#)

## Allow Sponsored Project Office (SPO) to View, Edit, and Submit a Proposal

1. Access the **Sponsored Project Office (SPO) Access Control** screen (Figure 1) (see [Allow or Remove SPO Access to a Proposal](#)).



**Figure 1 Sponsored Project Office (SPO) Access Control screen. The Go button for Allow SPO to View, Edit, and Submit Proposal is circled.**

2. Click the **Go** button for Allow SPO to View, Edit, and Submit Proposal (Figure 1). A screen displays (Figure 2) with a message that the SPO now has full access to the proposal and with a list of the individuals who will receive emails from FastLane on the proposal's new access status.



**Figure 2 Screen with the message that the SPO now has full access to the proposal and with the list of people the NSF will notify of the SPO's access.**

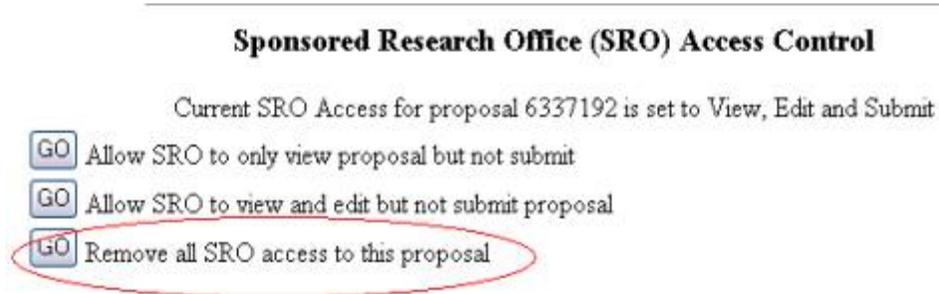
3. Click the **OK** button (Figure 2). The **Proposal Actions** screen displays.

See also:

- [Allow SPO to only view proposal but not submit](#)
- [Allow SPO to view and edit but not submit proposal](#)
- [Remove all SPO access to this proposal](#)

## Remove Sponsored Project Office (SPO) Access to a Proposal

1. Access the **Sponsored Project Office (SPO) Access Control** screen (Figure 1) (see [Allow or Remove SPO Access to a Proposal](#)).



**Figure 1 Sponsored Project Office (SPO) Access Control screen. The Go button for Remove All SPO Access to This Proposal is circled.**

2. On the **Sponsored Research Office (SPO) Access Control** screen (Figure 1), click the **Go** button for Remove All SPO Access to This Proposal. A screen displays (Figure 2) with the message that SPO access to the proposal is blocked.



**Figure 2 Screen with the message that SPO access to the proposal is blocked.**

3. Click the **OK** button (Figure 2). The **Proposal Actions** screen displays.

See also:

- [Allow SPO to only view proposal but not submit](#)
- [Allow SPO to view and edit but not submit proposal](#)
- [Allow SPO to view, edit, and submit proposal](#)

## Copy a Submitted Proposal

1. On the **FastLane Home Page** screen, log in to Proposals, Awards and Status as a PI (see [PI/Co-PI Login](#)). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management** screen displays (Figure 1).

### Principal Investigator(PI)/Co-Principal Investigator(Co-PI) Management

#### What Do You Want To Work On?

- [Proposal Functions](#)
- [Award And Reporting Functions](#)
- [Change PI Information](#)

**Figure 1** Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management screen. The Proposal Functions link is circled.

2. Click **Proposal Functions** (Figure 1). The **Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Proposal Functions** screen displays (Figure 2).

### Principal Investigator(PI)/Co-Principal Investigator(Co-PI) Management

#### Proposal Functions

- [Proposal Preparation](#)
- [Proposal Status](#)
- [Revise Submitted Proposal Budget](#)
- [Proposal File Update](#)

**Figure 2** Principal Investigator (PI)/Co-Principal Investigator (Co-PI) Management Proposal Functions screen. The Proposal Preparation link is circled.

3. Click **Proposal Preparation** (Figure 2). The **Principal Investigator (PI) Information** screen displays (Figure 3).

## Principal Investigator (PI) Information

**Notice:** In the January 2002 Grant Proposal Guide (GPG), NSF published revised proposal preparation guidelines. Review the latest [Project Summary Section of the Grant Proposal Guide \(opens new window\)](#) and [Project Description Section of the Grant Proposal Guide \(opens new window\)](#) for more information. PIs were instructed that they must address both merit review criteria in the preparation of proposals submitted to NSF. The GPG now reflects that proposers must clearly address, in separate statements within the one-page limitation, both of the NSF merit review criteria in the Project Summary. The GPG also reiterates that broader impacts resulting from the proposed project must be addressed in the Project Description and described as an integral part of the narrative.

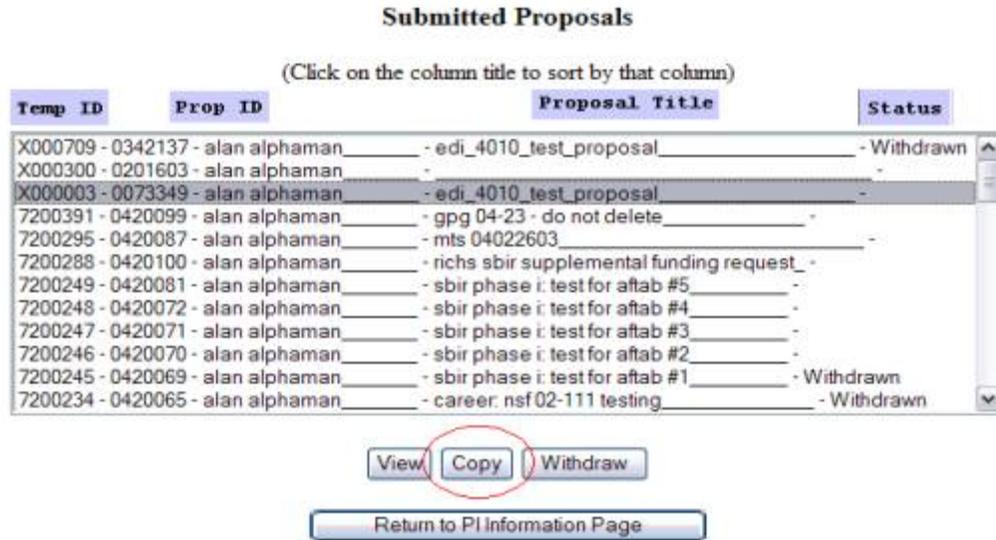
Examples illustrating activities likely to demonstrate broader impacts are available electronically on the NSF website at: [http://www.nsf.gov/pubs/2004/nsf042/bicesamples.pdf \(opens new window\)](http://www.nsf.gov/pubs/2004/nsf042/bicesamples.pdf).

These changes should be carefully considered by PIs when preparing proposals for submission to NSF. Effective October 1, 2002, proposals that do not address the two merit review criteria in separate statements in the project summary will be returned without review.

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Gender	Do not wish to provide		
Citizenship	Do not wish to provide	Degree Year	2004
Ethnicity	Do not wish to provide	Degree	PhD
Disability Status			
Race	White		
Serving or ever served on a Federally Funded Project as a PI or Co-PI -	No		

**Figure 3 Principal Investigator (PI) Information screen. The View Submitted buttons are circled.**

- Click either of the **View Submitted** buttons (Figure 3). The **Submitted Proposals** screen displays (Figure 4).



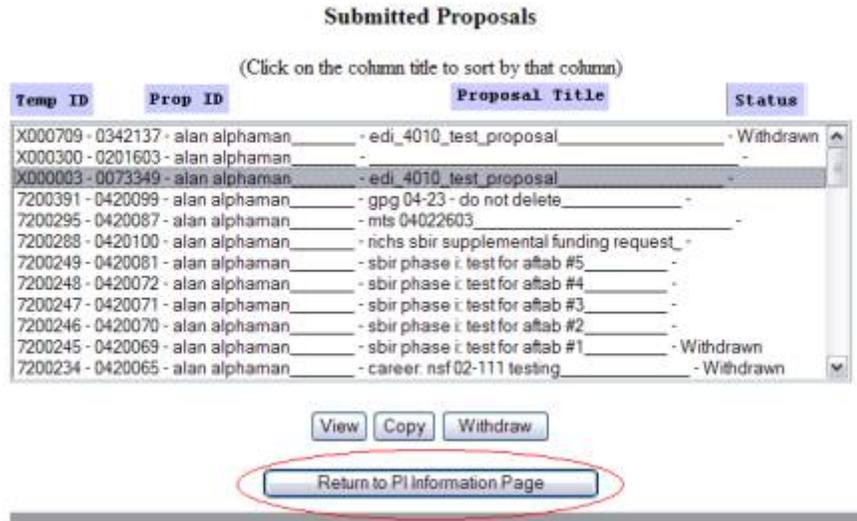
**Figure 4 Submitted Proposals screen. The Copy button is circled.**

- Highlight the proposal you want to copy from the **Submitted Proposals** list (Figure 4).
- Click the **Copy** button (Figure 4). A screen displays (Figure 5) with the message that the proposal you selected is now copied to a new work in progress with a Temporary Proposal Number.



**Figure 5 Screen with the message that the proposal is copied as a new proposal in progress with a Temporary Proposal Number. The OK button is circled.**

- Click the **OK** button (Figure 5). The **Submitted Proposals** screen displays (Figure 6).



**Figure 6 Submitted Proposals screen. The Return to PI Information Page button is circled.**

- To edit the copied proposal, click the **Return to PI Information Page** button (Figure 6). The **Principal Investigator (PI) Information** screen displays (Figure 7).

## Principal Investigator (PI) Information

Notice: In the January 2002 *Grant Proposal Guide* (GPG), NSF published revised proposal preparation guidelines. Review the latest [Project Summary Section of the Grant Proposal Guide \(opens new window\)](#) and [Project Description Section of the Grant Proposal Guide \(opens new window\)](#) for more information. PIs were instructed that they must address both merit review criteria in the preparation of proposals submitted to NSF. The GPG now reflects that proposers must clearly address, in separate statements within the one-page limitation, both of the NSF merit review criteria in the Project Summary. The GPG also reiterates that broader impacts resulting from the proposed project must be addressed in the Project Description and described as an integral part of the narrative.

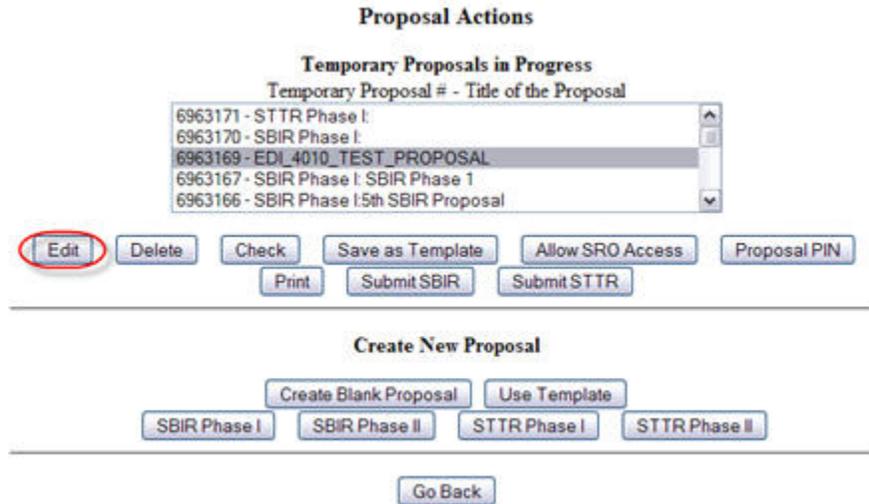
Examples illustrating activities likely to demonstrate broader impacts are available electronically on the NSF website at: [http://www.nsf.gov/pubs/2004/nsf042/bcesamples.pdf \(opens new window\)](http://www.nsf.gov/pubs/2004/nsf042/bcesamples.pdf).

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Country	US		
Gender	Do not wish to provide		
Citizenship	Do not wish to provide	Degree Year	2004
Ethnicity	Do not wish to provide	Degree	PhD
Disability Status			
Race	White		
Serving or ever served on a Federally Funded Project as a PI or Co-PI -	No		

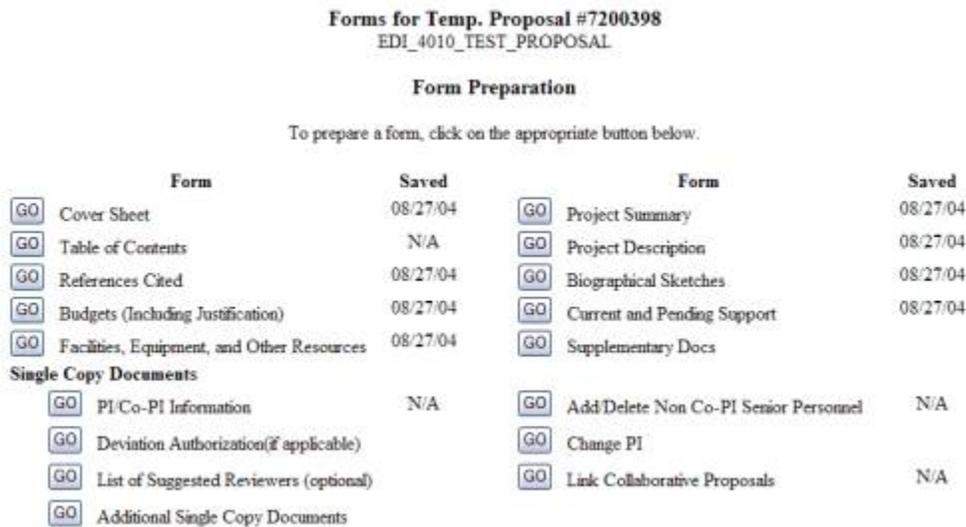
**Figure 7 Principal Investigator (PI) Information screen. The Prepare Proposal buttons are circled.**

- Click one of the **Prepare Proposal** buttons (Figure 7). The **Proposal Actions** screen displays (Figure 8).



**Figure 8 Proposal Actions screen with the newly copied proposal highlighted. The Edit button is circled.**

10. Highlight the copied proposal in the **Temporary Proposals in Progress** list (Figure 8).
11. Click the **Edit** button (Figure 8). The **Form Preparation** screen displays (Figure 9) for the copied proposal. See [Prepare Proposal Forms](#) for instructions on how to work on all the forms in the **Form Preparation** screen.



**Figure 9 Form Preparation screen for the copied proposal.**

See also:

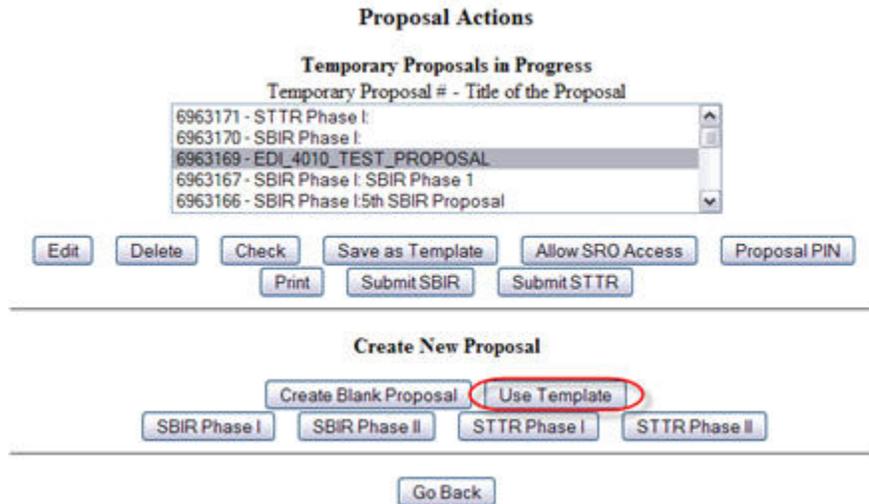
- Create a new proposal
- Create a template for a proposal
- Create a new proposal from a template
- Edit a proposal
- Assign a PIN to a proposal

## pd\_prepare\_proposal\_functions

- Check a proposal for completeness
- Allow or Remove SPO access to a proposal
- Delete a proposal template

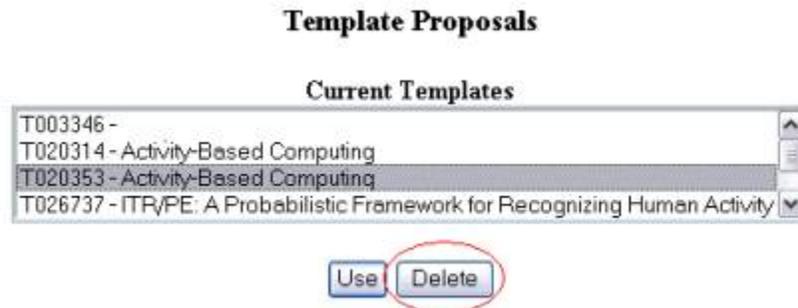
## Delete a Proposal Template

1. Access the **Proposal Actions** screen (Figure 1) (see Steps 1 through 4 of [Create a New Proposal](#) or of [Edit a Proposal](#)).



**Figure 1** Proposal Actions screen. The Use Template button is circled.

2. Click the **Use Template** button (Figure 1). The **Template Proposals** screen displays (Figure 2).



**Figure 2** Template Proposals screen. The Delete button is circled.

3. Highlight the template you want to delete from the **Current Templates** list (Figure 2).
4. Click the **Delete** button (Figure 2). A screen displays (Figure 3) with a message for you to confirm that you want to delete the highlighted template.

Please confirm that you want to delete the template proposal #T000331



**Figure 3** Screen with a message for you to confirm that you want to delete the highlighted template.

5. Click the **OK** button (Figure 3). The **Template Proposals** screen displays as in Figure 2, but with the template removed from the **Current Templates** list.

See also:

- Create a new proposal
- Create a template for a proposal
- Create a new proposal from a template
- Edit a proposal
- Assign a PIN to a proposal
- Check a proposal for completeness
- Allow or Remove SPO access to a proposal
- Copy a submitted proposal

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