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### 1) PROPOSAL CREATION

1. website: <https://www.fastlane.nsf.gov/fastlane.jsp>
2. know your login password (obtain via Toshua)
3. select 'Proposals, Awards, and Status'
4. complete the "PI/Co-PI Log In" box
5. Select "Log in"
6. Select "Proposal functions"
7. Select "Proposal preparation"
8. Select "Prepare proposal"; the Grant Proposal Guide can be found at [http://www.nsf.gov/publications/pub\\_summ.jsp?ods\\_key=gpg](http://www.nsf.gov/publications/pub_summ.jsp?ods_key=gpg)
9. write down the proposal number
10. create a PIN number
  - On the "Proposal Actions" page, select the "Proposal PIN" button and establish a four digit PIN.
11. Provide proposal ID, PIN, and budget needs to Toshua
12. Work on various sections of proposal using either direct entry or by downloading a completed .pdf, .doc, .dvi, or .ps file. Remember, there are page number, margin and font rules (see Chapter 2 of Grant Proposal Guide) that apply to all parts.
  - Cover sheet (program applying to, title)
  - Project description
  - Project summary-be sure to include broader impact ([http://www.nsf.gov/news/news\\_summ.jsp?cntn\\_id=104268](http://www.nsf.gov/news/news_summ.jsp?cntn_id=104268) and <http://www.nsf.gov/pubs/2002/nsf022/bicexamples.pdf>) and intellectual merit
  - References cited
  - PI/co-PI information
  - Biographical sketches-use the required format; see Chapter 2C2f of Grant Proposal Guide)
13. Toshua will add:

- facilities/equipment
  - basis for the budget justification, or this is available at the Business Office section of the Math website
  - current and pending
14. Add to the budget justification. You should include:
    - If you have a student, what will he/she do for you?
    - Where might you travel domestically? Include the conference or collaborator, and location.
    - Where might you travel internationally? Include the conference or collaborator, and location.
    - Why you need a new computer (if applicable)
    - Why you need to purchase books/other supplies (if applicable)
    - Who you might invite to UIUC as a collaborator, including where they will travel from.
  15. Review proposal. If you need to print, select “print” from navigation bar on right of Form Preparation page.
  16. Tell Toshua when you are ready for Department Chair's approval.
  17. Select “Allow SRO access to review, edit, and submit” in Fastlane. This will give Grants and Contracts (OSPRA) full access.
  18. Sign transmittal form Toshua provides.
  19. The signed transmittal form is given to Department Chair for signature.
  20. The proposal package goes to UIUC OSPRA (aka Grants and Contracts) for review. They will submit to NSF, and you will receive an email when this is done.

## 2) UPDATING THE BUDGET OF A PROPOSAL

1. Go to <https://www.fastlane.nsf.gov/jsp/homepage/proposals.jsp>
2. login as the PI/Co-PI
3. Select “Proposal Functions”
4. Select “Revise Submitted Proposal Budget”
5. Select the proper proposal
6. Select “View”
7. Select “Edit the Budget” and “OK”
8. Make changes as needed, saving as you progress. Be sure to include the budget impact statement.
9. If you want someone else to access the proposal, select “Go Back” and then “Assign a PIN to the Revised Proposal Budget”
  - a. Type a four digit PIN twice
  - b. Select “Assign”
  - c. Select “Go Back”
10. Once completed, select “Forward Budget Revision to Sponsored Research Office”
11. Sign the transmittal form provided by Toshua.
12. The signed transmittal form is given to Department Chair for signature.
13. A copy of the revision will be mailed to OSPRA. OSPRA will approve the changes and submit them to NSF.

### 3) INTERIM REPORT SUBMISSION

1. Go to <https://www.fastlane.nsf.gov/jsp/homepage/proposals.jsp>
2. login as the PI/Co-PI
3. select "Award and Reporting Functions"
4. Select "Project Reports System"
5. Select the "Interim Project Report" tab (if necessary)
6. Select the proper Award Number
7. Under Action, select "Create/Edit" to work on a report.
8. Select "continue"
9. Enter each section of the report and complete as required OR select "attach file" and include a document with all the necessary pieces.
10. When complete, select "submit"

### 4) ANNUAL or FINAL REPORT SUBMISSION

1. Go to <https://www.fastlane.nsf.gov/jsp/homepage/proposals.jsp>
2. login as the PI/Co-PI
3. Select "Award and Reporting Functions"
4. Select "Project Reports System"
5. Select the "Annual/Final Project Report tab" (if necessary)
6. Select the proper Award Number
7. Under Action, select "Create/Edit" to work on a report.
8. Select "continue"
9. Enter each section of the report and complete as required OR select "attach file" and include a document with all the necessary pieces.
10. When complete, select "submit"

### 5) REQUESTING A NO-COST EXTENSION FOR THE FIRST TIME

1. Go to <https://www.fastlane.nsf.gov/jsp/homepage/proposals.jsp>
2. login as the PI/Co-PI
3. Select "Award and Reporting Functions"
4. Select "Notifications and Requests"
5. Under Prepare New, select an award number, and then "prepare new"
6. Under Grantee Notification Types (left side), select "Grantee Approved No-Cost Extension"
7. At the bottom of the page, select "Prepare"
8. Complete Revised Expiration Date, Justification, and Explanation for late request (if applicable) boxes.
9. Select "Save" and select "Forward the request to the SPO"

#### 6) REQUESTING A NO-COST EXTENSION FOR THE SECOND TIME

1. Go to <https://www.fastlane.nsf.gov/jsp/homepage/proposals.jsp>
2. login as the PI/Co-PI
3. Select “Award and Reporting Functions”
4. Select “Notifications and Requests”
5. Under Prepare New, select an award number, and the “prepare new”
6. Under Grantee Request Types (on the right), select “NSF Approved No-Cost Extension”
7. At bottom of page, select “Prepare”
8. Complete Revised Expiration Date, Remaining Funds, Justification, Plan for use of unobligated funds, and Explanation for late request (if applicable) boxes.
9. Select “Save” and select “Forward the request to the SPO”

#### 7) REQUESTING A REBUDGET IF NO PARTICIPANT COSTS ARE INVOLVED

1. Work with Toshua to create an Excel file with columns for account codes, original budget, revised budget, and change between budgets (credit/debit). Current available funding is not needed.
2. Write a description of the need for the rebudget.
3. Send description to Toshua so she can obtain Department Chair approval.
4. Wendy will send all three items to Grants and Contracts.

#### 8) REQUESTING A REBUDGET IF PARTICIPATION COSTS ARE INVOLVED

1. Go to <https://www.fastlane.nsf.gov/jsp/homepage/proposals.jsp>
2. login as the PI/Co-PI
3. Select “Award and Reporting Functions”
4. Select “Notifications and Requests”
5. Under Prepare New, select an award number, and then “prepare new”
6. Under Grantee Request Types (right side), select “Reallocation of Funds Budgeted for Participant of Trainee Support Costs”
7. At bottom of page, select “Prepare”
8. Complete information (original amount budgeted, revised budget, justification)
9. Save and select “Forward the request to the SPO”

#### 9) TO REPORT AN ABSENCE OF THE PI (ie. sabbatical or other leave)

1. Go to <https://www.fastlane.nsf.gov/jsp/homepage/proposals.jsp>
2. login as the PI/Co-PI
3. Select “Award and Reporting Functions”
4. Select “Notifications and Requests”

5. Under Prepare New, select an award number and then “prepare new”
6. If you will be off-campus or off-payroll for under 3 months, select “Short-Term Absence of the PI/PD (Up to Three Months)” from under Grantee Notification Types (the left side)
7. If you will be off-campus or off-payroll for longer than 3 months, select “Long-Term Absence of the PI/PD (Over Three Months)” under Grantee Request Types (on the right side).
8. Select “Prepare”
9. Complete information as needed
10. Save and select “Forward the request to the SPO”

#### 10) TO CHANGE OBJECTIVE OR SCOPE

1. Go to <https://www.fastlane.nsf.gov/jsp/homepage/proposals.jsp>
2. login as the PI/Co-PI
3. Select “Award and Reporting Functions”
4. Select “Notifications and Requests”
5. Under Prepare New, select an award number, and then “prepare new”
6. Under Grantee Request Types (right side of page), select “Changes in Objective or Scope”.
7. Select “Prepare”
8. Complete information (Proposed change, justification)
9. Save and select “Forward the request to the SPO”

#### 11) TO REQUEST SUPPLEMENTAL FUNDING

1. Go to <https://www.fastlane.nsf.gov/jsp/homepage/proposals.jsp>
2. login as the PI/Co-PI
3. Select “Award and Reporting Functions”
4. Select “Supplemental Funding Request”
5. Select an award number and “Prepare Supplemental Funding Request”
6. Select “Edit” if started, or “Create New Supplemental Funding Request” if one doesn’t already exist.
7. Complete information (summary, justification, budget as provided by Toshua, etc.)
8. Select “Go Back” when done.
9. Select “Allow SRO Access”
10. Sign transmittal form provided by Toshua.
11. The signed transmittal form is given to Department Chair for signature.
12. The supplemental funding request goes to UIUC OSPRA (aka Grants and Contracts) for review. They will submit to NSF, and you will receive an email when this is done.

## 12) PI TRANSFER

1. Go to <https://www.fastlane.nsf.gov/jsp/homepage/proposals.jsp>
2. login as the PI/Co-PI
3. Select “Award and Reporting Functions”
4. Select “Notifications and Requests”
5. Under Prepare New, select an award number and “Prepare new”
6. Select “PI Transfer” (right side) and “Prepare”
7. Complete requested information (new organization, start date of change, funds remaining, reason).
8. Save and select “Forward the request to the SPO”