FastLane Proposal Preparation

1. PI receives password from Office of Sponsored Research.

2. PI accesses FastLane homepage <**www.fastlane.nsf.gov**>.

3. PI clicks on Proposal Preparation.

4. PI types in last name, SSN, and password, then clicks on **Proposal Preparation** button.

5. PI checks the information on the PI Information screen and updates if necessary by clicking on the **Edit PI Info** button. This information will be automatically pulled into any proposal on which he/she is a PI or Co-PI.

6. PI scrolls down the page and clicks on **Prepare Proposal** button.

7. If this is the first time to access, a screen appears, "**Create New Proposal?**" Click the **OK** button to continue.

8. On the Proposal Actions screen, either click on **Create Blank Proposal** button, or highlight proposal in progress then click on a special program button such as the **Edit** button. Under the dialog box are buttons -- **Edit, Delete, Check, Save as Template, Allow SRO Access, Proposal PIN**, and **Print**. Click on a proposal in progress and then click on one of these button. ***NOTE**: The SRO can not view/edit/submit a proposal until the PI clicks on the **Allow SRO Access** Button.*

9. The Form Selector screen appears. On the right side of the screen are Navigation buttons to access quickly all the parts of the proposal. Note the proposal in progress number in case the FastLane Help Desk (1-800-673-6188) must be called.

10. The first form to create is the Cover Sheet. Click on the **Go** button.

11. **Cover Sheet.** The Cover Sheet, is divided into four sections – Awardee/Performing Organization, Program Announcement, NSF Unit Consideration, and Remainder of Cover Sheet. Fill out as many fields as possible and click on the **OK** button to save.
    a. **Awardee/Performing Organization Selection**. Click on **GO** button to correct. When finished selecting a new institution, click on the **Go Back** button.

    b. **Program Announcement/Solicitation/Program Description No., or In response to Grant Proposal Guide (GPG).** Click on the items in the dialog box. Click on the Select button. When a program announcement is selected, only the appropriate division(s) and program(s) for that program announcement will come up for selection as the NSF unit to consider the proposal. If the proposal is not in response to a program announcement, when a program is selected to consider the proposal, the correct division will be given. If the divison is selected first, only the appropriate programs under that division will show.

c. NSF Unit Consideration. If previous step is done, this option is not necessary. Sometimes, the Program Announcement has more than one area of interest. In that case, a choice must be made here.

d. Remainder of the Cover Sheet.

C1. The program announcement is automatically pulled in.
C2. Date. Click on the pop down. If more than one date is available, click on the appropriate date.
C3. EIN/TIN is automatically filled in.
C4 If this is a renewal or an accomplishment based renewal, click on appropriate radio button and type in award number.
C5. If this is a preproposal, click the toggle box so a check mark appears. If this is a full proposal in response to a submitted preproposal, type in the proposal number.
C6. Type in Title of Proposed Project.
C7. If the the budget form is not going to be filled in, type in Requested Amount. Otherwise, the dollar amount will automatically fill in when the budget year(s) are saved. Type in Proposed Duration in months. Type in Requested Starting Date making sure to use the format mm/dd/yy.
C8. Click appropriate boxes. For experiments on Vertebrate Animals and Human Subjects leave the box empty if the institution's board approval is pending. The box only takes a date. It will be assumed that the approval is pending.
C9. Click the toggle box if high resolution pictures are part of the proposal. This obligates the researcher to mail the required number of complete proposals to the program office. A screen will appear telling how many copies are required.
C10. Type in the SSNs of Co-PIs. These people must be on the NSF mainframe PI table. Also Co-PIs are alphabetized once the Cover Sheet is saved. If SSN will not save, add the Co-PI to both the organization's FastLane User table and the NSF PI table using Institutional Management of FastLane. If the Co-PI is not with the organization, email the Co-PI information to fastlane@nsf.gov and ask that the person be added into the NSF PI table. In the email request include PI's full name, SSN, phone, FAX, e-mail address, organization. Also, once the cover sheet is saved, the names of the Co-PIs will be alphabetized.
C11. Type in AOR information. If this is not known, the SRO can type in this information at time of submission.
C12. Type in AOR phone and FAX numbers. Type in only numbers--No (), -, ., or commas.

C12. Click on the **OK** button to save Cover Sheet.

12. **PI/Co-PI information**. This screen can not be updated. The PI and any Co-PI must access Proposal Preparation screen or click on **Edit PI Info** on the home page and update his/her information on the PI Information.
    a. Click on the **GO** button.
    b. Click on the **OK** button to return to Form Selector screen.

13. **Project Summary, Project Description, Bio Sketches, References Cited, Current and Pending support, Supplementary Docs, Budget Justification, Facilities, and Equipment and other Resources.** All but the Project Description allow either attachment of a PDF file, a word processing document, or the use of the dialog box. For the Project Description, a PDF file or a word processing document must be attached. To use the dialog box, either type directly into the or prepare the text on a word processor and then copy/paste the text into the box. Click on the **OK** button to save. Follow the guidelines in the Program Announcement when creating these documents. To create the PDF file, please follow directions on **FastLane PDF Creation Hits and Pointers** which is found on the website: www.fastlane.nsf.gov/a1/pdfcreat.htm

14. Add/Delete Non Co-PI Senior Personnel.
   a. Click on **GO** button.
   b. Add the First Name, MI, and Last Name of each person. No SSN is required.
   c. Note that Bio Sketch and Current and Pending Support forms must be filled out for each senior personnel.
   d. Click on **GO BACK** button when completed.

15. **Budget.** Click on **GO** button.
    A. Primary Institution Budget.
      a. Create each Budget year. Access and fill in appropriate boxes.
         1. Add senior personnel. After the year is saved, the personnel will be alphabetized. The PI and all Co-PIs will automatically become senior personnel on the primary budget. They can not be deleted. If The Co-PI is from another organization and will be paid on a subcontract budget, leave months and salary as “0”.
         2. Other personnel must be listed as whole numbers. If a person is only working 4 hours a day on the project, type in the amount to be given as wages and then note this in the Budget Justification.
         3. All equipment costing more than $5000 must be listed. Equipment costing less can be clumped together as Misc. Equipment. It can then be justified under Budget Justification.
         4. Subcontracts will not be automatically pulled in to the primary budget. The subcontract amount for each year must be added together and typed in under Direct Costs Subawards.

5. The indirect cost rate must be a whole number. If the rate is 50%, type in 50.
6. Cost sharing amounts are independent entities. The amount must be subtracted from the item on the budget then justified in the Budget Justification. For example if the university is willing to pay $50,000 for a $250,000 workstation, only $200,000 will be requested for the workstation.

b. Click on the **SAVE** button to save the budget infomation.
c. Click on the **GO BACK**.

B. Subcontract Budgets.

a. Select the subcontract institutions immediately. If one or more are not present, they must be added. It takes 2 days to add a new institution.
b. Once inside the Budget application, click on **Add New Inst** button.
c. Select Subcontract PI from list of senior personnel.
c. Total subcontract budgets for each year and type into the primary institution's year budget in the Subcontracts box (under OTHER DIRECT COSTS).

C. **Spreadsheet Support** (Will not work on UNIX platforms or most MACs)

a. Download template.
b. Access template using Excel.
c. Type into the yellow cells. The red cells are accumulating cells.
d. Save in Excel 5 format. Do not upgrade format to Excel 7.
e. Upload saved template.

D. **Budget Justification** has a 3 page limit. It can be prepared on a word processor and copied into the dialog box, typed in directly, or attached as a PDF file or word processing document.

E. Possible problems.

a. If PI salaries are confidential, create a senior personnel named Total Salaires, add to list of senior personnel on budget year and type in total salary amount.
b. If individual equipment is less than $5000 a piece and one entry is made, make sure to type Misc. Equipment in description box.
c. Type in number for percent of indirect cost. Form will not save if entry box is empty. If the cost rate is 50%, type in 50.
d. Subtract cost sharing amount of entry item. Cost sharing amount will not subtract automatically.

16. Project Description.

a. .Click on **GO** button.
b. Click on **Browse** button.
c. Find PDF file or word processing document and double click on it.
d. Click on **Transfer** button.
e. Click on the **Continue** button.
f. Click on the **GO BACK** button to return to Form Selector Screen.

17. Project Summary.

a. Click on **GO** button.
b. Use dialog box or transfer a file.
c. Dialog box: . Type directly into box or prepare the document on a word processor and then copy/paste the document into the box. Click on the **OK** button to save.
d. If a PDF file or word processing document has been prepared, attach it.
e. Click on the **GO BACK** button to return to Form Selector Screen.

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18. References Cited.

a. Click on **GO** button.
b. Use dialog box or transfer a file.
c. Dialog box: . Type directly into box or prepare the document on a word processor and then copy/paste the document into the box. Click on the **OK** button to save.
d. If a PDF file or word processing document has been prepared, attach it.
e. Click on the **GO BACK** button to return to Form Selector Screen.

19. Bio Sketches.

a. Click on **GO** button.
b. Use dialog box or transfer a file.
c. Dialog box: . Type directly into box or prepare the document on a word processor and then copy/paste the document into the box. Click on the **OK** button to save.
d. If a PDF file or word processing document has been prepared, attach it.
e. One PDF file or word processing document containing all the bio sketches may be attached to the PI's name.
f. Click on the **GO BACK** button to return to the Form Selector Screen.

20. Current and Pending Support.

a. Click on **GO** button.
b. Use dialog box or attach transfer a file.
c. Dialog box: . Type directly into box or prepare the document on a word processor and then copy/paste the document into the box. Click on the **OK** button to save.
d. If a PDF file or word processing document has been prepared containing all the current and pending support for that person, attach it. A file containing the current and pending support for everyone can be attached to the PI.
e. Click on the **GO BACK** button to return to the Form Selector Screen.

21. Facilities, Equipment, and Other Resources.

a. Click on **GO** button.
b. Use dialog boxes on form or transfer a file.

c. Dialog box: . Type directly into box under each category or prepare the document on a word processor and then copy/paste the document into the box. Click on the **OK** button to save.
d. If a PDF file or word processing document has been prepared, attach it.
e. Click on the **GO BACK** button to return to the Form Selector Screen.

22. **Link Collaborative Proposals.** If this is a Collaborative Proposal (several organizations working on the same project but submitting their proposals separately), the proposals can be linked together. First the lead organization must be selected. Then the lead organization types in the temporary proposal numbers of the other collaborating organizations.
    a. Click on **GO** button.
    b. On the next screen, type in the temporary proposal number then click on the **Add Collaborative TPI to Proposal** button.
    c. Click on **GO BACK** button to return to Forms Selection Screen

23. Supplementary Docs. More than one supplementary document can be attached as a PDF file or word processing document.
    a. Click on **GO** button.
    b. Attach PDF and word processing files containing scanned Certification Pages, Letters of Intent, etc.
    c. Click on **GO BACK** button to return to the Forms Selection Screen..

24. **Change PI.** The PI can be changed to one of the Co-Pis.
    a. Click on the **GO** button.
    b. Click on the Co-PI who will replace the PI.
    c. Click on the **GO BACK** button to return to the Forms Selection Screen.

OPTIONAL (Single Copy Documents):

1. **List of Suggested Reviewers.**
    a. Click on the **GO** button.
    b. Type in a list of suggested reviewers into a dialog box or prepared on a word processor and copied into the dialog box.
    c. Type in a list of reviewers not to include..
    d. Click on the **GO BACK** button to forms selector screen.

2. **Deviation Authorization.**
    a. Contact Program Office for authorization first.
    b. Click on the **GO** button.
    c. Type into the dialog box or copy and paste into the dialog box.
    d. Click on the **GO BACK** button to return to the dialog box.

BS February 6, 2001