



## Add a New Organization-Approved Role - Principal Investigator PI/Co-PI



To work on National Science Foundation (NSF) proposal and award activities in Research.gov or via Grants.gov, a Principal Investigator (PI)/co-Principal Investigator (co-PI) must have an organization-approved Investigator role. After requesting a role, your organization’s Administrator will receive the request electronically to approve or disapprove it. To request an organization-approved role, you must sign into [Research.gov](https://www.research.gov) and select the “My Profile” link located on the top right of the screen. Select the “Add a New Role” option from the left navigation bar.

### Access the Add New a Role page

- To request an organization-approved Investigator role, click the blue “Add Investigator or Authorized User Role” button located in the “Prepare Proposals and Manage Awards” box. (Figure 1)
- Select “Principal Investigator (PI) or co-Principal Investigator (co-PI)”, click “Submit” (Figure 2) and a four-step role request wizard will display. (Figure 3)

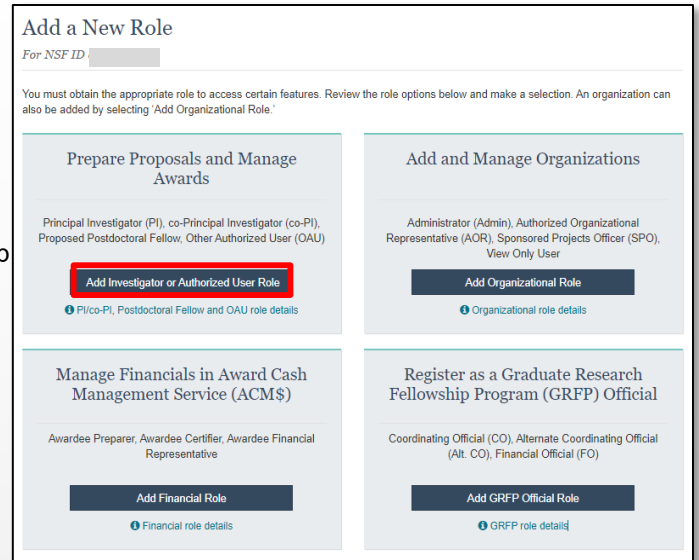


Figure 1

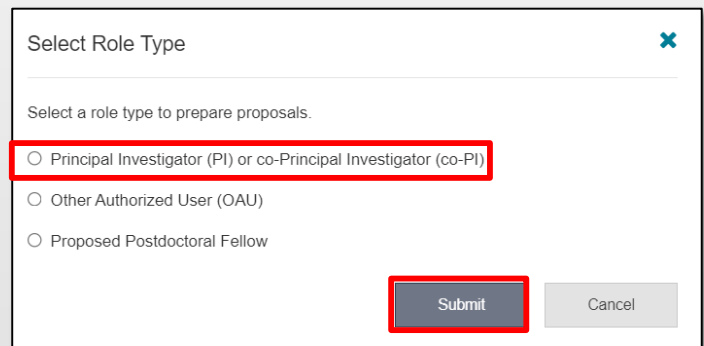


Figure 2

### Four-Step Role Wizard

#### Step 1: Find Organization

- Enter the organization’s Unique Entity Identifier (UEI) and click “Search” (Figure 3). If you already have an organization-approved role at NSF, select the UEI associated with your existing organization from the drop-down menu. This step is the same whether your organization is a prime or subrecipient.
- Verify the correct organization is displayed in the results section and click “Next.”

**Note:** For more information about SAM UEIs, go to [SAM.gov](https://www.sam.gov). or contact your Sponsored Projects Office (SPO).

Cornell UEI: G56PUALJ3KT5

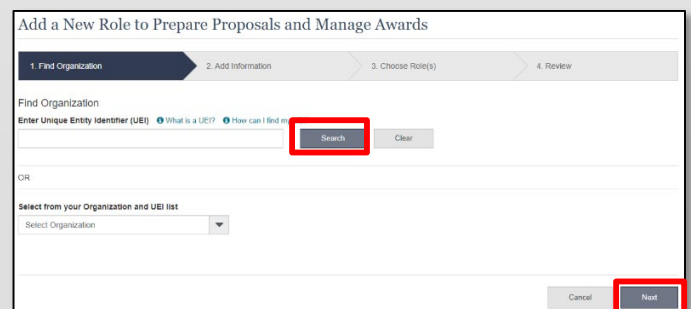


Figure 3



## Step 2: Add Information

- Complete the required fields denoted by a red asterisk (\*) and click “Next.” (Figure 4)

**Important Note:** Your Demographic Information will not be shared with the listed Organizational Contacts while reviewing and approving your role request.

## Step 3: Choose Role(s)

- The “Principal Investigator” role is pre-selected. Click “Next.” (Figure 5)

## Step 4: Review and Submit

- Review your information for accuracy and click “Submit.” (Figure 6)
- If you need to update your PI role request information, select the “Previous” button to return to the previous screens.

## Success

- Your role request is sent to the listed Organization Contacts for review and approval. (Figure 7)
- You have successfully submitted your organizational role request!

Figure 4

Figure 5

Figure 6

Organization Contact(s)	Organization Contact Type
Smith, John	Administrator
John Doe	Administrator
Carey, Mariah	SAM POC
Jolie, Angelina	SAM POC
Doe, Jane	SAM POC

Figure 7



## Helpful Tips

- Your work email address is associated with all your roles at a particular organization. It is used for role request and approval notifications as well as for proposal and award related notifications.
- The Degree Information section will be pre-populated if you previously provided this information. If you update this section, the change will be reflected within the “Academic/Professional Information” tab in My Profile and for all organizations where you have an organizational Investigator role.
- The Demographic Information section will be pre-populated if you previously provided this information. If you update this section, the change will be reflected within the “Demographic Information” tab in My Profile and for all organizations where you have an organizational Investigator role.
- By default, the latest PI role will be set to primary.



## Add a New Organizational Role – Proposed Postdoctoral Fellow



To work on National Science Foundation (NSF) proposal and award activities in Research.gov or via Grants.gov, you must have an organizational Investigator role. Registering for a Proposed Postdoctoral Fellow organizational role creates an organization in Research.gov, but you do not need to register the organization with NSF. You will become the Administrator of the newly created organization; however, other users cannot request organizational roles or affiliate themselves with the organization. You do not need to register the newly created organization with [SAM.gov](http://SAM.gov) or obtain a UEI.

To request an organizational Investigator role, you must sign in to [Research.gov](http://Research.gov) and select the “My Profile” link located on the top right of the screen. Then select the “Add a New Role” option from the left navigation bar.

### Access the Add a New Role page

- To request an organizational Investigator role, click the blue “Add Investigator or Authorized User Role” button located in the “Prepare Proposals and Manage Awards.” (Figure 1)
- Select “Proposed Postdoctoral Fellow”, click “Submit” (Figure 2) and a two-step role request wizard will display. (Figure 3)

### Two-Step Process

#### Step 1: Add Information

- Input data into all required fields that have a red asterisk (\*)

**NOTE:** When a Proposed Postdoctoral Fellow role is created, an institution record is created as well. The time zone selected as part of your initial Proposed Postdoctoral Fellow role request will be used by NSF for proposal submission.

- Click “Next.” (Figure 3)

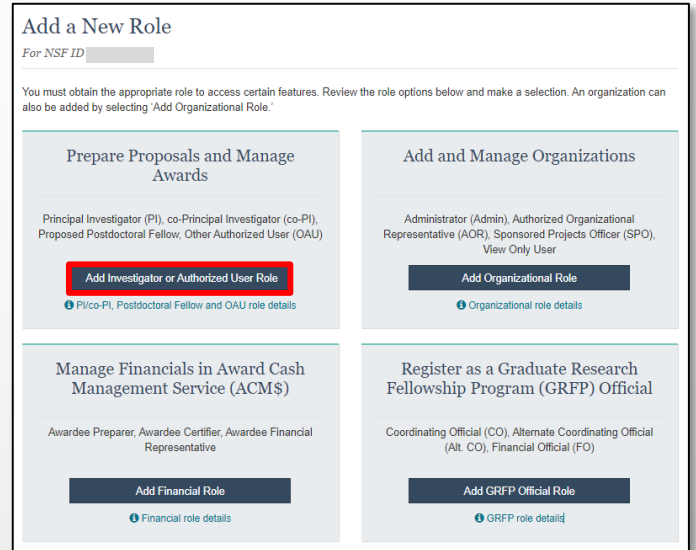


Figure 1



### Helpful Tips

- The third option in the “Select Role Type” modal box (Figure 2) is disabled if you already have an organizational Proposed Postdoctoral Fellow role. To view your current organizational Proposed Postdoctoral Fellow role information, click on “View My Roles” and refer to the Active Roles table.
- Your work email address is associated with all your roles at a particular organization. It is used for role request and approval notifications as well as for proposal and award related notifications.
- The Degree Information section will be pre-populated if you previously provided this information. If you update this section, the change will be reflected within the “Academic/Professional Information” tab in My Profile and for all organizations where you have an organizational Investigator role.
- The Demographic Information section will be pre-populated if you previously provided this information. If you update this section, the change will be reflected within the “Demographic Information” tab in My Profile and for all organizations where you have an organizational Investigator role.
- By default, the latest PI role will be set to primary.

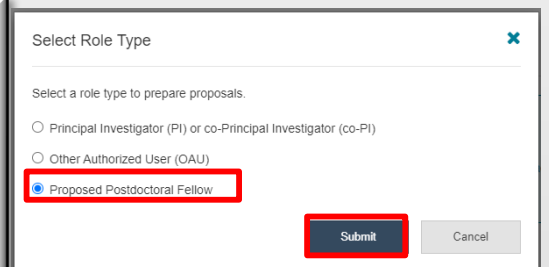


Figure 2



Add a Proposed Postdoctoral Fellow Role

**\* Required**

**Your Contact Details**

\* Work Phone Number: (111) 111-1111

\* Work Email: John.Doe@abc.com

**Your Degree Information**

The degree information entered here will be used to populate the printed Cover Sheet of your proposals to NSF.

\* Highest Degree Type: AS - Associate in Science

\* Degree Year: 2005

**Your Work Address**

\* Country: United States

\* Time Zone: Pacific/Pago\_Pago (GMT-11:00)

\* Street Address: 123 Test St

Street Address (Line 2): Suite 100

\* City: Alexandria

\* State: Vermont

\* Postal Code: 12345

**Your Demographic Information**

NSF asks for demographic data relating to gender, ethnicity/race and disability to gauge whether our programs and other opportunities in science and technology are fairly reaching and benefiting everyone regardless of demographic category; and to ensure that those in under-represented groups have the same knowledge of and access to programs, meetings, vacancies, and other research and educational opportunities as everyone else. For more information, read the Privacy Act Statement.

\* Gender (Please select one):  Male,  Female,  Unspecified, or another gender identity,  Do not wish to provide

\* Ethnicity (Please select one):  Hispanic or Latino,  Not Hispanic or Latino,  Do not wish to provide

\* Race (Please select all that apply):  American Indian or Alaska Native,  Asian,  Black or African American,  Native Hawaiian or Other Pacific Islander,  White,  Other (Please specify),  Do not wish to provide

\* Do you have a disability? (Please select one):  What is considered a disability?,  Yes,  No,  Do not wish to provide

Buttons: Cancel, **Submit**

Figure 3

## Step 2: Review

- Review your information for accuracy and click **“Submit.”** (Figure 4)
- If you need to update your role request information, select the **“Previous”** button to return to the previous screen.

Add a Proposed Postdoctoral Fellow Role

Review your information for accuracy.

Organization Name: Dvc, Joba  
Role: Proposed Postdoctoral Fellow

**Your Contact Details**

Work Phone Number: (111) 111-1111  
Work Email: John.Doe@abc.com

**Your Degree Information**

Highest Degree Type: AS - Associate in Science  
Degree Year: 2005

**Your Work Address**

Country: United States  
Time Zone: Pacific/Pago\_Pago  
Street Address: 123 Test St  
Street Address (Line 2): Suite 100  
City: Alexandria  
State: Vermont  
Postal Code: 12345

**Your Demographic Information**

Gender: Unspecified, or another gender identity  
Race: Asian, Black or African American  
Ethnicity: Hispanic or Latino  
Do you have a disability?: Yes

Buttons: Cancel, Previous, **Submit**

Figure 4

## Step 3: Confirmation

- View the success message to confirm you have successfully added the Proposed Postdoctoral Fellow organizational role. (Figure 5)

Add a Proposed Postdoctoral Fellow Role

You have successfully added the Proposed Postdoctoral Fellow role. Please note that it can take up to 30 minutes for you to be able to prepare postdoctoral fellowship proposals.

Prepare and Submit Proposals >

Continue to My Profile >

Add Additional Roles >

Figure 5



## View My Organizational Roles – Requested Role(s)



The View My Roles page shows the roles you have requested which are pending approval or disapproval from your organization’s Administrator as well as your existing approved roles. You may view Organization Contact(s) and edit your organization contact information by following the step-by-step process below.

Individuals who are reviewers will also see reviewer/meeting participant information including reviewer organizational affiliations displayed on this page. Please see the [View My Reviewer/Meeting Participant Information](#) job aid for additional reviewer information.

## Access the View My Roles page

- Open [Research.gov](https://www.research.gov)
- Click **“Sign In”** located at the top right of the screen.
- Enter your credentials (e.g., NSF ID and password) and click **“Sign In.”**
- Click **“My Profile”** located at the top right of the screen.
- Click **“View My Roles”** from the left navigation bar.

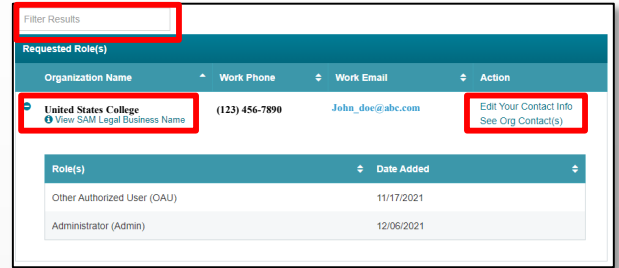


Figure 1

## How do I change organization contact information for a PI or co-PI role?

- Locate the organization and click **“Edit Your Contact Info”** in the **“Action”** column located on the right side of Requested Role(s) table. (Figure 1)
- Users who have a PI or co-PI role will see the screen depicted in Figure 2 and can edit their contact details, degree information, and work address. Then click **“Save.”**
- Time zone and proposal deadlines are determined by the submitting organization’s time zone, not your individual working location. Changing your work address will not change your time zone. To update your time zone, please contact the NSF Help Desk at 1 (800) 381-1532 or [rgov@nsf.gov](mailto:rgov@nsf.gov). For general guidance on proposal preparation and submission, see the [NSF Proposal & Award Policies & Procedures Guide](#).

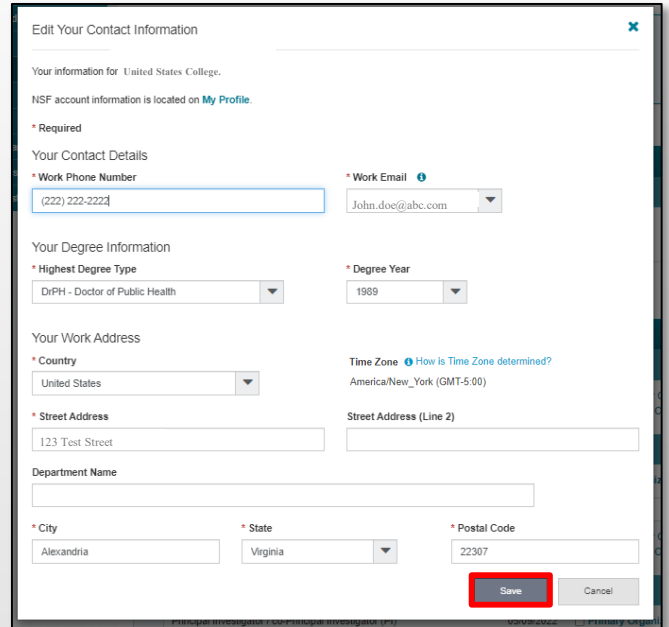


Figure 2



### Helpful Tips

- The Requested Role(s) table depicted in Figure 1 can be filtered, sorted, and expanded:
  - Filter on any information contained in the table by typing into the Filter Results box in the upper left corner.
  - Sort data in ascending or descending order by clicking the arrows located next to the column names.
  - Expand and collapse the organization name to display and hide roles.





## How do I change organization contact information if I have an organizational role other than PI or co-PI?

Locate the organization and click **“Edit Your Contact Info”** in the **“Action”** column located on the right side of Requested Role table. (Figure 1 on previous page)

- Users with organizational roles other than PI or co-PI roles will see the screen depicted in Figure 3 and can edit their work phone number and work email address. Then click **“Save.”**

Figure 3

## Who do I contact at my organization for role request questions?

- Locate the organization and click **“See Org Contact(s)”** in the **“Action”** column located on the right side of Requested Role table. (Figure 1 on previous page)
- The Organization Contacts modal box will appear. (Figure 4)

Figure 4

Organization Contact(s)	Organization Contact Type
Doe, John	Administrator
Doe, Jane	Administrator
Apple, Annie	Administrator
Pear, Priscilla	Administrator
Orange, Oliver	Administrator



### Helpful Tips

- Each NSF account requires a primary email address and a work email address. (Figure 2 on previous page & Figure 3)
  - Your primary email address is used for important notifications about your NSF account such as password resets. It is critical that you have continued access to this email account (e.g., a Gmail address), even if you change organizations.
  - Your work email address is associated with all your roles **at a particular organization**. This email address is used for role request and approval notifications as well as for proposal and award related notifications.



## View My Organizational Roles – Active Role(s)



The View My Roles page shows the roles you have requested which are pending approval or disapproval from your organization’s Administrator as well as your existing approved roles. You may view Organization Contact(s) and edit your organization contact information by following the step-by-step process below. You may set your Primary Organization designation if you have a PI/co-PI role at an organization or are a Proposed Postdoctoral Fellow.

Individuals who are reviewers will also see reviewer/meeting participant information including reviewer organizational affiliations displayed on this page. Please see the [View My Reviewer/Meeting Participant Information](#) job aid for additional reviewer information.

## Access the View My Roles page

- Open [Research.gov](#)
- Click **“Sign In”** located at the top right of the screen.
- Enter your credentials (e.g., NSF ID and password) and click **“Sign In.”**
- Click **“My Profile”** located at the top right of the screen.
- Click **“View My Roles”** from the left navigation bar.

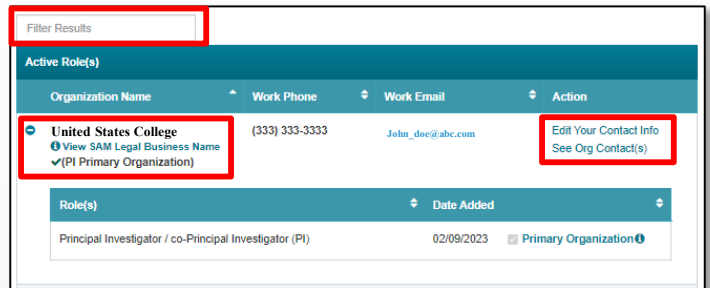


Figure 1

## How do I change organization contact information for a PI or co-PI role?

- Locate the organization and click **“Edit”** in the “Action” column located on the right side of Active Role(s) table. (Figure 1)
- Users who have a PI or co-PI role will see the screen depicted in Figure 2 and can edit their contact details, degree information, and work address. Then click **“Save”**.
- Time zone and proposal deadlines are determined by the submitting organization’s time zone, not your individual working location. Changing your work address will not change your time zone. To update your time zone, please contact the NSF Help Desk at 1 (800) 381-1532 or [rgov@nsf.gov](mailto:rgov@nsf.gov). For general guidance on proposal preparation and submission, see the [NSF Proposal & Award Policies & Procedures Guide](#).

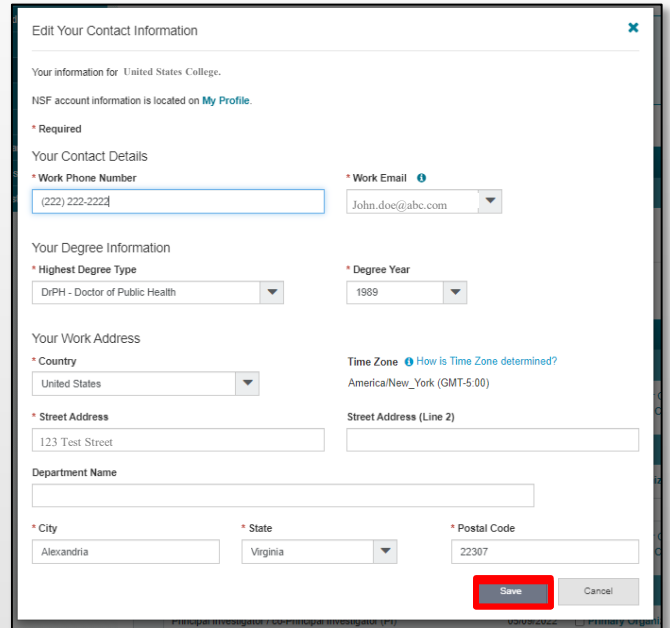


Figure 2



### Helpful Tips

- The Requested Role(s) table depicted in Figure 1 can be filtered, sorted, and expanded:
  - Filter on any information contained in the table by typing into the Filter Results box in the upper left corner.
  - Sort data in ascending or descending order by clicking the arrows located next to the column names.
  - Expand and collapse the organization name to display and hide roles.



## How do I change organization contact information for a Proposed Postdoctoral Fellow role?

- Locate the organization and click **“Edit Your Contact Info”** in the “Action” column located on the right side of Requested Role table. (Figure 1 on previous page)
- Users who have a Proposed Postdoctoral Fellow role will see the screen depicted in Figure 3 and can edit their contact details, degree information, and work address. Then click **“Save.”**
- Time zone is determined by the time zone you selected during your initial role request. Changing your work address will not change your time zone. To update your time zone, please contact the NSF Help Desk at 1 (800) 381-1532 or [rgov@nsf.gov](mailto:rgov@nsf.gov). For general guidance on proposal preparation and submission, see the [NSF Proposal & Award Policies & Procedures Guide](#).

Figure 3

## How do I change organization contact information for all other roles?

- Locate the organization and click **“Edit Your Contact Info”** in the “Action” column located on the right side of Requested Role table. (Figure 1 on previous page)
- Users who have roles other than PI, co-PI or Proposed Postdoctoral Fellow roles will see the screen depicted in Figure 4 and can edit their work phone number and work email address. Then click **“Save”**.

Figure 4

## Who do I contact at my organization for role request questions?

- Locate the organization and click **“See Org Contact(s)”** in the “Action” column located on the right side of Requested Role table. (Figure 1 on previous page)
- The Organization Contacts modal box will appear. (Figure 5)

Organization Contact(s)	Organization Contact Type
Doe, John P.	Administrator
Doe, Jane	Administrator
Apple, Alice	Administrator
Pear, Priscilla	Administrator
Orange, Oliver	Administrator

Figure 5



### Helpful Tips

- Each NSF account requires a primary email address and a work email address. (Figures 2 and 3)
  - Your primary email address is used for important notifications about your NSF account such as password resets. It is critical that you have continued access to this email account (e.g., a Gmail address), even if you change organizations.
  - Your work email address is associated with all your roles **at a particular organization**. This email address is used for role request and approval notifications as well as for proposal and award related notifications.



## How do I set an organization as my Primary Organization for proposal submissions?

- **Prerequisites:** You must have either an organization-approved Principal Investigator (PI) role or a Proposed Postdoctoral Fellow role before you can designate a Primary Organization.
  - If you don't have an organization-approved Principal Investigator role and would like to request one, refer to the [Add a New Organization-Approved Role - Principal Investigator PI/Co-PI](#) job aid.
  - If you don't have a Proposal Postdoctoral Fellow role and would like to request one, refer to the [Add a New Organizational Role – Proposed Postdoctoral Fellow](#) job aid.
- Open the “**View My Roles**” page and locate the Active Role(s) table. (Figure 6)
- Locate the organization where you have an approved PI role that you would like to set as your Primary Organization. (Figure 6)
- If your roles at the organization are not already expanded, click on the plus sign next to the organization name to expand the row. (Figure 6)
- Locate the Principal Investigator role. (Figure 6)
- Select the “**Primary Organization**” check box located to the right of the Date Added field. (Figure 6)
- Notice the green check mark and “PI Primary Organization” label under the organization name. (Figure 6)
- By default, the Organization associated with the latest PI role added to your profile (including a Proposed Postdoctoral Fellow role) will become the Primary Organization.

Organization Name	Work Phone	Work Email	Action
United States College View SAM Legal Business Name ✓(PI Primary Organization)	(999) 999-9999	John_doe@abc.com	Edit Your Contact Info See Org Contact(s)

Role(s)	Date Added
Other Authorized User (OAU)	11/29/2021
Principal Investigator / co-Principal Investigator (PI)	11/29/2021 <input checked="" type="checkbox"/> Primary Organization
Administrator (Admin)	11/29/2021

Cornell UEI: G56PUALJ3KT5

Figure 6



### Helpful Tips

- You can only have one Primary Organization.
- Only PIs need to select a Primary Organization.
- By default, the Organization associated with the latest PI role added to your profile (including a Proposed Postdoctoral Fellow role) will become the Primary Organization.