



Contents

Introduction	2
How to Become a Financial Function User	2
Assigning the Financial Administrator Role	3
Add New User	3
User Profile screen	8
Modify a User Profile	8
Assigning the Financial Function User Roles.....	9
Logging In to Research.gov	11
How to Change the Banking (EFT) Information	13
Award Cash Management Service	14



Introduction

To conduct financial activities with NSF, you must be assigned Financial Functions User (FFU) permissions through FastLane. FFU permissions are assigned by your organization's Financial Administrator. Once you are an FFU, you can use the Award Cash Management Service to:

1. Request Payments for NSF awards.
2. View award and organization payment history and financial information.

How to Become a Financial Function User (FFU)

Before you can access the FastLane financial functions, you must become an FFU; this involves three steps:

1. A **Sponsored Project Office (SPO)** representative in your organization—with permissions to add, modify, and delete users and to initialize/change passwords—gives an individual in your organization the **Financial Administrator** permission. The Financial Administrator is usually a member of your organization's Finance Office, such as the Controller or Deputy Controller. (If necessary, the SPO can also be the Financial Administrator.)
2. The **Financial Administrator** gives permissions to one or more of your organization's authorized FastLane users to perform financial functions. An individual performing these functions is an **FFU**. (If necessary, the Financial Administrator can also be an FFU).
3. The **FFU** conducts financial functions with NSF on behalf of your organization.

The table below summarizes the roles of the FastLane Contact, the Financial Administrator, and the FFU.



Who	Where to Log On in FastLane	Role
FastLane Contact/SPO: the person in your organization who has all FastLane Research Administration permissions.	Research Administration	<ul style="list-style-type: none"> • Add, modify & delete • Designates the Financial Administrator- can designate self as Financial Administrator, if necessary. • Authorizes individuals as FastLane users to whom the Financial Administrator can assign permissions for financial functions. • Set and reset passwords. • Withdraw authorization from the Financial Administrator.
Financial Administrator: individual in your organization, usually from the Finance or Business Office, such as, the Controller or Deputy Controller	Research Administration	<ul style="list-style-type: none"> • Assigns financial function permissions to one or more individuals. • Withdraws permissions to perform financial functions. • Grants permissions to perform financial functions to self. • <i>Cannot reset passwords</i>
Financial Functions User: one or more individuals who have permission to carry out one or more financial functions	Financial Functions	<ul style="list-style-type: none"> • Can perform financial functions as authorized by Financial Administrator: <ul style="list-style-type: none"> ○ ACM\$ Awardee Preparer ○ ACM\$ Awardee Financial Representative ○ ACM\$ Awardee Certifier

Assigning the Financial Administrator Role

The SPO designates a Financial Administrator by giving an individual the Financial Administrator permission in the Accounts Management application of Research Administration. The SPO can do this in two ways: **1. Add a new User**, and **2. Modify a User Profile**.

Add New User

Go to *Research.gov* and click on the **Research Administration** link at the bottom of the screen as shown below:



Research.gov
ONLINE GRANTS MANAGEMENT
FOR THE NSF COMMUNITY

Log In | Home | Contact | Help | About

Search

Take Note: As of Friday, November 20th, award data within Research Spending & Results may be out of date. We are working to resolve this issue and apologize for the inconvenience.

[Hide all notifications](#) (Viewing 1 of 1 notification)

Can't remember your NSF password?

Find out how you can use your university password to log in to Research.gov.

[Learn More/Register](#)

Prepare & Submit Proposals

Prepare, submit and check status of proposals

- Check Proposal Status

FASTLANE PROPOSAL FUNCTIONS

- Additional proposal functions

Proposal/ Panel Review

Review proposals, participate in panels

FASTLANE PROPOSAL REVIEW

- Proposal Review

FASTLANE PANEL REVIEW

- Panelist Functions

Awards & Reporting

Submit project reports, notifications & requests

- Project Reports
- Deposit Public Access Publication
- Example Project Reports (Demo site)
- Notifications & Requests

FASTLANE AWARD FUNCTIONS

- Additional award functions

Fellowships & Honorary Awards

Nominate colleagues, apply for awards

- Graduate Research Fellowship Program (GRFP)
- Postdoctoral Fellowships and Other Programs
- Honorary Awards

Administration

Manage your account and user roles

- User Management

FASTLANE ORGANIZATION MANAGEMENT

- Research Administration

Manage Financials

View balances and submit cash requests

- Submit or manage payment transactions
- More about ACMS
- Program Income Reporting

NSF Award Highlights

- Explore Scholarly publications in the NSF Public Access Repository (NSF-PAR)
- Search awards going back to 1994

1. On the **Research Administration** screen, log in, then click on **Accounts Management**. The **Accounts Management** screen will display the **User Account** tab by default.



FastLane is an interactive real-time system used to conduct NSF business over the Internet. FastLane is for official NSF use only. [More About FastLane...](#)

[NSF Home](#) | [News](#) | [Site Map](#) | [FastLane Help](#) | [Grants.gov Help](#) | [Contact Us](#)

**FastLane
User
Support**

(7 AM to 9 PM Eastern Time • M-F)
1-800-673-6188
FastLane Availability (recording):
1-800-437-7408

[Proposals, Awards and Status](#) | [Proposal Review](#) | [Panelist Functions](#) | [Research Administration](#) | [Financial Functions](#)

[Honorary Awards](#) | [Graduate Research Fellowship Program](#) | [Postdoctoral Fellowships and Other Programs](#)

Quick Links

- ▶ [Instructions for Research Administration](#)
- ▶ [New Organization Registration](#)
- ▶ [EDI Proposal Preparation](#)
- ▶ [Use of NSF ID](#)
- ▶ [FastLane Proposal Preparation and Submission Guide \(7.1MB PDF\)](#)
- ▶ [Grant Proposal Guide](#)

Research Administration

Login for the following permission based functions:

- ▶ Accounts Management
- ▶ Letters of Intent
- ▶ Proposals/Supplements/File Updates/Withdrawals
- ▶ Award Documents
- ▶ Forwarded/Submitted Revised Budgets
- ▶ Notifications & Requests
- ▶ Organizational Reports
- ▶ Project Reports
- ▶ Authorized Organizational Representative Functions

Log In

Last Name:

NSF ID:
[Privacy Act](#)

Password:

Select one:

- Research Administration
- Submit EDI Proposals

[Forgot Password?](#)
[Lookup NSF ID](#)



As a security measure, your FastLane session will expire after remaining idle for 180 minutes.

Download [Adobe Acrobat Reader](#) for viewing PDF files

National Science Foundation
4201 Wilson Boulevard, Arlington, Virginia 22230, USA
Tel: 703-292-5111, FIRS: 800-877-8339 | TDD: 703-292-5090

[Privacy and Security](#)



Research Administration

Select a Research Administration function for NSF :

- ▶ **Accounts Management**
- ▶ Letters of Intent
- ▶ Proposals/Supplements/File Updates/Withdrawals
- ▶ Award Documents
- ▶ Forwarded/Submitted Revised Budgets
- ▶ Notifications & Requests - Disabled in FastLane. Log in to Research.gov
- ▶ Organizational Reports
- ▶ Project Reports - Disabled in FastLane. Log in to Research.gov
- ▶ Authorized Organizational Representative Functions



New In Box

Now you can easily review current work in progress directly from this page.

Click below to select current items for review.

In Box

	Proposals/Supplements/File Updates/Withdrawals	89	items for review
	Forwarded/Submitted Revised Budgets	1	items for review
	AOR Functions	0	items for review
	Letters of Intent	0	items for review

2. Click the **Add New User** button and the *Add New User* screen will display.

Research Administration | HOME ▶

NSF Home | News | Site Map | GPG | AAG | Contact Us | FastLane Help
Change Password | Logout

Organization: NSF

Accounts Management | MAIN ▶

[User Account](#) | [Organization Information](#) | [Financial Representative Information](#)

[View Organization Permissions Report](#) ▶

🔍 Search for existing User to view/modify data:

Last Name: | |

Search Results

Click on User Name to view/modify/delete data. Sort results by clicking column title.

No users found. 1

Name	Email Address	Actions
Nothing found to display		

Export options: [Excel](#)

3. In the *User Profile* section, leave the *NSF ID* box blank. NSF will generate an NSF ID for the new user. The following fields must be completed:

- First Name box (user's first name)



- Last Name box (user's last name)
- Email box (user's email)
- Phone Number box (user's direct line-optional entry)
- Fax Number box (user's fax number-optional entry)

In the *Create a Password* box, create and confirm a password for the new user:

Note: If the new user is a **Principal Investigator (PI)**, complete the *Principal Investigator (PI) Profile* section and click the **Add user as PI** check mark box.

- Type any suffix for the user (PI)
 - Specify a department from the *Department* drop-down list (optional entry)
 - Specify a degree type from the *Degree* drop-down list
 - Select appropriate degree year
4. Click the *check mark* box for Financial Administrator within the *User Permissions* section.
 5. Click the **Add User** button – the *View Add User Profile* screen will display showing all profile information and permissions of the new user.



User Profile screen

Add New User Organization ID: 000000000

Enter the user's NSF ID if known. Leave the field blank for the system to generate a new NSF ID.
Required Fields are preceded by an asterisk ()*

User Profile

NSF ID:

*First Name:

*Last Name:

*Email:

Phone Number: 10 digits only

Fax Number: 10 digits only

[Privacy Act](#)
MI:

Create Password:

*Create Password:

*Confirm Password:

[Password Requirements](#)

Principal Investigator (PI) Profile

Add User as PI

Suffix: (Dr., Sr., III, Etc)

Department:

*Degree Type: ▼

*Degree Year: ▼

ORGANIZATION NAME:
Carnegie-Mellon University

(Once added to the NSF PI profile, the PI can change his/her address through the PI Information screen in the Proposal Preparation function.)

User Permissions

- Add, Modify, and Delete FastLane Users
- Change User Permissions
- Initialize/Change User Password
- Organizational Reports
- Administer Notifications To or Requests For NSF Approvals Under Grants
- Submit Proposals/Supplements/Updates/Withdrawals to NSF
- Administer Revised Budgets
- View/Print Organization's Award Letters
- View Project Reports
- Review/Revise Organizational Information
- Authorized Organizational Representative Functions
- Financial Administrator**

6. Click the **Confirm Add User** button –NSF ID displays on notification.

CONFIRMATION

Add User Data for - jack wilshere

User has been successfully added to the FastLane system.

User Permissions have been successfully added.

User Financial Permissions have been successfully added.

Please note your NSF ID generated by the system is **000706199**

[Account Management Main](#)

Modify a User Profile

1. Go to the FastLane home page and click on **Research Administration**. The Research Administration home page displays with a listing of functions. Login using your last name, NSF ID number, and password.



2. On the **Research Administration** screen, click **Accounts Management**. The **Accounts Management** screen will display with the **User Account** tab as default.
3. Search for the User whose profile you need to modify.
4. On the **Accounts Management** screen, click **Modify** on the row for the user whose profile you want to modify.

The screenshot shows the 'Accounts Management' interface for the 'NSF' organization. The 'User Account' tab is selected. A search bar is highlighted with a red circle, containing the text 'Search for existing User to view/modify data:'. Below the search bar, the text 'Last Name: wilshere' is entered, followed by a 'Search' button. To the right are 'View All Users' and 'Add New User' buttons. Below the search bar, the 'Search Results' section is displayed. It shows '1 user found.' and a table with the following data:

Name	Email Address	Actions
wilshere, jack	jwil@gmail.com	View Modify Delete

Export options: Excel

Cancel

5. The **Modify User Profile** screen displays showing the individual's permissions.
6. In the **User Permissions** section, click the check mark box for Financial Administrator.
7. Click the **Modify User** button, and the **View Modify User Profile** screen will display.
8. Click the **Confirm Changes** button and the **Confirmation** screen will display.
9. Click **Account Management Main**, and the **Accounts Management Main** screen will again be displayed with the **User Account** tab as default.

The SPO Representative has now completed the required steps. The Financial Administrator must follow step two below to complete the financial setup.

Assigning the Financial Function User Roles

The Financial Administrator gives permissions to one or more of your organization's authorized users to perform Financial Functions. The Financial Administrator is the only user who can assign permissions for Financial Functions to an individual in your organization. If the individual



is not yet a user, have the SPO or another individual with Add, Modify, and Delete User permissions add the person as a user by completing the processes for **Add a New User** under Step 1 above.

To assign Financial Function permissions to an existing user:

1. Go to the FastLane home page and click on **Research Administration**. The Research Administration home page displays with a list of functions. Login using your NSF ID, last name and password.
2. Click on **Accounts Management**. The User Account tab screen displays as default.
3. On the User Account tab screen, search for the user you want to designate as a Financial Functions User (FFU).
 - a. On the **Accounts Management** screen on the **User Account** tab, click **Modify** on the row for the user you want to make an FFU. The **Modify User Profile** screen will display.
 - b. In the **Financial Permissions** section, click the check mark box for any number or all of the financial permissions shown in the screen below. Institutions should have at least one user with the following financial permissions:
 - ACM\$ Awardee Preparer
 - ACM\$ Awardee Certifier
 - ACM\$ Awardee Financial Representative

Financial Permissions

<input type="checkbox"/>	Financial Report Preparer
<input type="checkbox"/>	Financial Report Certifier
<input type="checkbox"/>	Cash Request
<input type="checkbox"/>	Cash Request History
<input type="checkbox"/>	Grantee EFT Certifier
<input type="checkbox"/>	Grantee EFT Preparer
<input type="checkbox"/>	Grantee EFT History
<input type="checkbox"/>	ACM\$ Awardee Financial Representative
<input type="checkbox"/>	ACM\$ Awardee Preparer
<input type="checkbox"/>	ACM\$ Awardee Certifier

A single user can act as the preparer and certifier simultaneously. *As mentioned, all permissions will be assigned by the Financial Administrator*



Logging In to Research.gov

If you have been added as a new user and given financial permissions. You can now perform those financial functions for which you have permission.

1. Go to the **Research.gov** home page, click on “Submit or manage payment transactions.” The Research.gov Log-in screen appears.

The screenshot displays the Research.gov home page with the following sections:

- Online grants management for the NSF community**
Research.gov is the modernization of FastLane, providing the next generation of grant management capabilities for the NSF research community.
[More](#)
- Prepare & Submit Proposals**
Prepare, submit and check status of proposals
Check Proposal Status
FASTLANE PROPOSAL FUNCTIONS
Additional proposal functions
- Proposal/ Panel Review**
Review proposals, participate in panels
FASTLANE PROPOSAL REVIEW
Proposal Review
FASTLANE PANEL REVIEW
Panelist Functions
- Awards & Reporting**
Submit project reports, notifications & requests
Project Reports
Deposit Public Access Publication
Example Project Reports (Demo site)
Notifications & Requests
FASTLANE AWARD FUNCTIONS
Additional award functions
- Fellowships & Honorary Awards**
Nominate colleagues, apply for awards
Graduate Research Fellowship Program (GRFP)
Postdoctoral Fellowships and Other Programs
Honorary Awards
- Administration**
Manage your account and user roles
User Management
FASTLANE ORGANIZATION MANAGEMENT
Research Administration
- Manage Financials**
View balances and submit cash requests
Submit or manage payment transactions (highlighted with a red arrow)
More about ACM\$
Program Income Reporting
- NSF Award Highlights**
Explore Scholarly publications in the NSF Public Access Repository (NSF-PAR) (awards going back to 1994)

2. Enter your last name, NSF ID Number, and password.

- a. Click on **Log in**.
- b. You will see your Research.gov **My Desktop** page.



 **Research.gov**
ONLINE GRANTS MANAGEMENT
FOR THE NSF COMMUNITY

[Log In](#) | [Home](#) | [Contact](#) | [Help](#) | [About](#)

NSF User Log In

There are 2 ways to log in to Research.gov. Use your **NSF ID** or your **organization credentials**.

NSF ID

Last Name:

NSF ID: [Forgot my NSF ID](#)

Password: [Change / Reset my password](#)

or

Organization credentials

Select your organization from the drop-down menu below, to be taken to the InCommon Log In page for your organization.

Pick your organization:

If you don't see your organization listed -
[Learn more](#) / [Register for InCommon](#)

[Log In for NSF Staff](#) [Log In for NSF Visitors](#)

- To access the ACM\$ click on the **Award Cash Management Service** link under Research.gov Services & Tools or the **Award Cash Management Service** link under your ACM\$ Dashboard.



Research.gov POWERING KNOWLEDGE AND INNOVATION

Home | Contact Us | Site Map | Help | My Profile | Logout | January 24, 2013

MY DESKTOP

Research.gov Services & Tools
Find Reviewers
Research Spending & Results
Policy Library
NSF Staff RSS Feeds
Award Cash Management Service
Research.gov Labs
About Labs
Proposal Compliance Review
Conflict Screening
Proposal Search
Document Search
Award Manager
NSF Services
eJacket
PIMS
Inside FastLane

What We Do
What is Research.gov?
NSF Staff Services
News
SEE Innovation

FEEDBACK
Tell Us What You Think

Find Reviewers **Award Manager** **Results**

Alerts
Award Manager, Panel Reporting and HRM Reporting Utility may be intermittently unavailable.
Research.gov will be undergoing maintenance January 24, 7:00 to 9:00 PM Eastern Standard Time (EST). Users will not be able to modify preferences or register a Visitor account during this time.
For additional assistance, contact IT Help Central - 7 AM to 7 PM EST, Monday through Friday at 703.292.HELP (4357), toll free at 800.711.8084 or by emailing ithelpcentral@nsf.gov.

My Desktop
Explore the new NSF Research.gov Desktop, an intuitive and flexible online workspace for NSF staff. The first new tools to be offered on the Desktop, Find Reviewers and What We Do, help to illustrate the kinds of exciting tools and services for staff that are possible through Research.gov. Try out the Desktop today and tell us what you think! NSF needs your feedback and input to help shape this workspace and the new tools that it offers.
The ultimate goal for the Desktop is to provide staff with an integrated location where they can access the resources needed to support their program work – a seamless experience for completing a variety of mission functions! The Desktop will provide easy, centralized access to the services, tools, and grants management information you need, including:
• Existing information (such as Principal Investigator and Reviewer data) provided in a single view, which can be utilized in dynamic ways previously not possible
• New information that was previously hard to find or inaccessible
• Brand-new tools and services, as well as existing business applications
• Instructional materials and job aids
Desktop Services Available:
Find Reviewers showcases the possibilities that exist in this environment for dynamic new tools and services and increased access to important information. Find Reviewers helps staff find and identify qualified reviewers by marrying information from a variety of sources to provide a comprehensive view of available reviewers.

Print Page Adjust Font Size: A A A

My Links Edit

Project Reports
Learn about the [transition of project reporting](#) from FastLane to Research.gov.

Events
January 28 - 29, 2013
[FDP General Meeting Conference](#)
March 8, 2013
[Webinar: Project Reports on Research.gov: What's in it for Me?](#)
Outreach

How to Change the Banking (EFT) Information

NSF disburses funds to your organization's bank account on the basis of the banking information you have submitted to the System for Award Management SAM. Before you can request a payment transaction you insure your SAM registration, to include the banking information is active and up to date. The SAM user guide is at:

https://www.sam.gov/sam/SAM_Guide/SAM_User_Guide.htm



Award Cash Management Service

ACM\$ is the financial service for award payments that requires the submission of award level payment amounts each time funds are requested. ACM\$ is accessed through www.research.gov. ACM\$ allows grantee institutions to submit cash requests and adjustments to open and closed awards, as well as access award level information on payments and award balances.

Use the links below to access ACM\$ user information.

[*ACM\\$ Getting Started Guide*](#)

[*ACM\\$ Permissions Guide*](#)