

**EPSCoR Research Infrastructure Improvement (RII)****EPSCoR Research Fellows (ERF)****2026 ANNUAL and FINAL REPORT GUIDELINES**

*There are no changes from the 2025 annual reporting guidelines.*

**A) Annual and Final Report deadlines**

Annual reports are due at NSF 90 days before the anniversary date of the award start date as specified in the NSF Award Document. Please keep in mind that reports take approximately four weeks on average to process and approve and often take longer if NSF EPSCoR requires revisions. If the report is not approved by the anniversary award date, it will be classified as overdue. Overdue reports will delay pending NSF actions with which the Principal Investigator (PI) are associated as PIs or co-PIs. If a No-Cost Extension is needed, PIs are encouraged to contact their managing Program Officer (PO) to discuss this process and its impact on the report deadline.

**B) Preparing and submitting the report – general considerations**

The following step-by-step instructions will help guide you in completing and submitting your annual report to EDOCS (OMB No. 3145-0243) and Research.gov. Feel free to contact the project's managing Program Officer for programmatic questions and [edocs-help@nsf.gov](mailto:edocs-help@nsf.gov) for EDOCS technical questions. Visit the EDOCS Website (<https://edocs.epscor.nsf.gov>) to view FAQs, training videos, and other helpful documents and links.

If you encounter technical issues while working with Research.gov, please contact their Help Desk, 7 AM - 9 PM ET, Monday - Friday (except federal holidays) at [rgov@nsf.gov](mailto:rgov@nsf.gov) or 1-800-381-1532. The EDOCS help desk not have the ability to monitor activity in Research.gov, so they are unable to provide support within that system. However, they are happy to assist EDOCS users as best as they can to ensure that users upload the appropriate documents and complete each section in Research.gov per NSF's instructions.

**C) Beginning your work with the EDOCS system**

All PIs should have received a welcome email containing instructions for logging into EDOCS and entering project participant information. If you have not received an EDOCS email please contact [edocs-help@nsf.gov](mailto:edocs-help@nsf.gov) to get your account set up.

To begin data entry, log on to EDOCS and enter the requested information for your EPSCoR project participants. Make sure to select the user role for each project participant. The system will send each of them an individual login email. This will enable them to complete their data entry<sup>1</sup>. The PI is responsible for verifying the project

data reported by the project participants in EDOCS. Once all data have been entered and the report narrative and supporting documentation have been uploaded into EDOCS, the PI may submit the report for review and approval by NSF EPSCoR POs by clicking the “Submit Report” button located at the bottom of the EDOCS home page. Only PIs can submit the report.

**D) Required Sections in EDOCS (please insert N/A in fields where you have nothing to report).**

**Trainees:** Add your postdoctoral researcher, graduate or undergraduate students who have worked on the project.

**Aims & Accomplishments:** Describe overall project goals and objectives; what was accomplished under these goals and objectives during the current reporting period.

**Reporting Documents:** The Narrative Report is the only additional document that is required. Provide a summary (2 pages or less) of the key accomplishments achieved during the report period, addressing the NSF criteria of intellectual merit and broader impacts, and program specific criteria. Additional reporting documents are not required, but you may choose to provide optional highlights or other materials relevant to your project as separate uploads in this section.

**International Experiences:** Country, attendee, start and end dates

**Institutional Visits:** Institution, length of visit, attendee

**Collaborations:** Title, institution, total number of collaborators, outcomes

**Honors/Recognitions:** Provide if applicable: Title, awardee, funding type, status

**Grants/Contracts/Proposals:** Provide information on additional proposals or funding that is related to or a direct result of the EPSCoR Research Fellows project. Include: Title, PI/Awardee, contributors, and funding type.

**Products:** Journals or conference papers, conference presentations, patent applications that resulted from project funding. Include: Title, contributors, product type.

**Technology Transfer & Startup Activity:** Provide if applicable

**Trainee Plan:** Provide if applicable. Include a brief description of activities to recruit and retain trainees (e.g. post-doc, graduate student, or undergraduate involved in the project).

**Changes/Problems:** Provide a brief description of any issues that may have affected the project’s progress towards achieving the stated goals and objectives.

**My Experiences:** Provide a reflection on the PI’s professional/personal experience of the fellowship. (For example: benefits, professional development, challenges, other

information that conveys what the PI gained from this ERF grant.)

## E) Entry of “Prescribed Phrases” into Research.gov

All awardees **MUST** complete the EDOCS data entry as well as minimal entry of prescribed phrases in research.gov. Failure to provide these reports on a timely basis will delay NSF review and processing of pending proposals for all identified PIs and co-PIs on a given award. Log on to Research.gov and complete the Annual Report for your EPSCoR project by entering a series of prescribed phrases into the appropriate text boxes. RII ERF awards do not use Research.gov for submission of Annual Report contents, but Research.gov is used to indicate that the report has been submitted. To submit the notification of a completed Annual Report to Research.gov, provide the following information under each of the category tabs located at the top of the Report Content screen within the Project Report section of Research.gov.

1. **Cover tab:** Review and verify all the information about the project (Project title, PD/PI name, etc.) displayed in the **Cover** screen. If any corrections are required, contact the Research.gov Help Desk, 7 AM - 9 PM Eastern Time, Monday through Friday (except federal holidays) at [rgov@nsf.gov](mailto:rgov@nsf.gov) or 1-800-381-1532.
2. **Accomplishments tab:**
  - a) Under the **Accomplishments** tab, manually insert (do not cut-and-paste to avoid an error message) the following statement in the first box labeled **What are the major goals of the project?**: “In accordance with the instructions provided to EPSCoR Principal Investigators, the Annual Project Report has been submitted separately to the NSF EPSCoR Data Outcome Collection System (EDOCS). The managing EPSCoR PO will review the contents of the report within EDOCS and subsequently transfer and approve the report in the appropriate NSF internal system.”
  - b) Next, there are four boxes under the question **What was accomplished under these goals (you must provide information for at least one of the 4 categories below)?** In the first box labeled **Major Activities**, manually insert (do not cut-and-paste to avoid an error message) the same statement identified above: “In accordance with the instructions provided to EPSCoR Principal Investigators, the Annual Project Report has been submitted separately to the NSF EPSCoR Data Outcome Collection System (EDOCS). The managing EPSCoR PO will review the contents of the report within EDOCS and subsequently transfer and approve the report in the appropriate NSF internal system.”
  - c) Leave the remaining three boxes (**Specific Objectives**, **Significant Results**, and **Key Outcomes or Other Achievements**) blank.
  - d) In the three boxes under the heading labeled **What opportunities for training and professional development has the project provided?** mark the **Nothing to report** checkboxes on the right-hand side.
  - e) Be sure to select the **Save/Next Section** button at the top of the screen before moving on to the next tab.
3. **Products tab:** Under the **Products** tab, do not enter any information. Select the **Nothing to report** checkboxes for each of the five items beneath the question **What has the project produced?** Select the **Save/Next Section** button at the top

of the screen before moving on to the next tab.

**4. Participants tab:**

- a) Under the **Participants** tab, in the section labeled **What individuals have worked on the project?**, enter the names of the EPSCoR PI and Co-PIs.
- b) For the section labeled **What other organizations have been involved as partners?**, select the **Nothing to report** checkbox on the right-hand side of the screen.
- c) For the section labeled **Have other collaborators or contacts been involved?**, select **No**.
- d) Select the **Save/Next Section** button at the top of the screen before moving on to the next tab.

**5. Impact tab:** Mark the **Nothing to report** checkbox on the right-hand side for each of the eight questions. Select the **Save/Next Section** button at the top of the screen before moving on to the next tab.

**6. Changes/Problems tab:** Mark the **Nothing to report** checkbox on the right-hand side for each of the six questions. Select the **Save/Next Section** button at the top of the screen before moving on to the next tab.

**7. Special Requirements tab:** Mark the **Nothing to report** checkbox on the right-hand side. Select the **Save/Next Section** button at the top of the screen before moving on to the next tab.

**8. Certify and submit:** Check the **Certification** checkbox and click the **Submit Report** button.

**Note:** In instances where “nothing to report” is entered in the report submission space in Research.gov, note that the relevant information (e.g., project accomplishments, contributions, publications, products) is included in the Annual or Final Report submitted in EDOCS.

## **F) EPSCoR Program Officer Approval**

The EPSCoR PO will review your report for content, formatting, and clarity. Reports may be returned to you for additions, corrections, or suggested revisions. If no revisions are necessary, the POs will approve the submission in EDOCS and Research.gov. Overdue reports (from this or any other NSF award) will cause a “block” to be placed on all funding, approval, and administrative actions for all NSF awards associated with both the PI and Co-PIs.