

Ad hoc reviews are submitted in the Proposal Evaluation System (PES) in Research.gov instead of in FastLane.

Introduction: Providing Reviewer Profile Information

NSF requires all *ad hoc* reviewers to have an NSF account in Research.gov and complete a quick, one-time registration process to provide reviewer profile information to access PES.

***Ad hoc* reviewers cannot access PES for proposal review activities until these tasks are completed.** Visit [Research.gov Account Management – Reviewer](#) for more information and training resources.

Each *ad hoc* reviewer must complete the following steps to access PES:

- Open [Research.gov](#) and select the **Register** function at the top of the Research.gov screen to create a new NSF account and to obtain an NSF ID. **Note:** Reviewers with an existing NSF account in Research.gov will skip this step. Each individual user of NSF systems (e.g., Research.gov) should not have more than one NSF ID as stipulated in the [Proposal & Award Policies & Procedures Guide](#) Chapter I.
- Sign into [Research.gov](#) and then click the **Provide Reviewer Profile Information** link under Reviews & Meetings on the Research.gov homepage.
- Enter the unique **invitation code** emailed to you (*see screenshot below*) or enter the **email address** where you received the *ad hoc* proposal review request and follow the instructions to provide reviewer profile information. Once completed, you will be able to access your assigned reviews in PES.

Example System-generated Provide Review Profile Information Email

Instructions

From: noreply@nsf.gov <noreply@nsf.gov>
Sent: Saturday, March 25, 2023 12:14 AM
To: Apple, Anna <AnnaTestApple@gmail.com>
Subject: NSF - Action Needed: Provide Reviewer Profile Information

Dear Anna Apple,

NSF now requires all meeting participants to manage profile information in Research.gov. You will not be able to participate until you have completed this one-time process. You may need to provide additional information such as organizations and demographics.

To provide reviewer profile information (including any prior reviewer history):

1. Navigate to [Provide Reviewer Profile Information](#), also found under "Reviews & Meetings" on "My Desktop."
([Sign in](#) to Research.gov required.)
2. Enter the Invitation Code below:

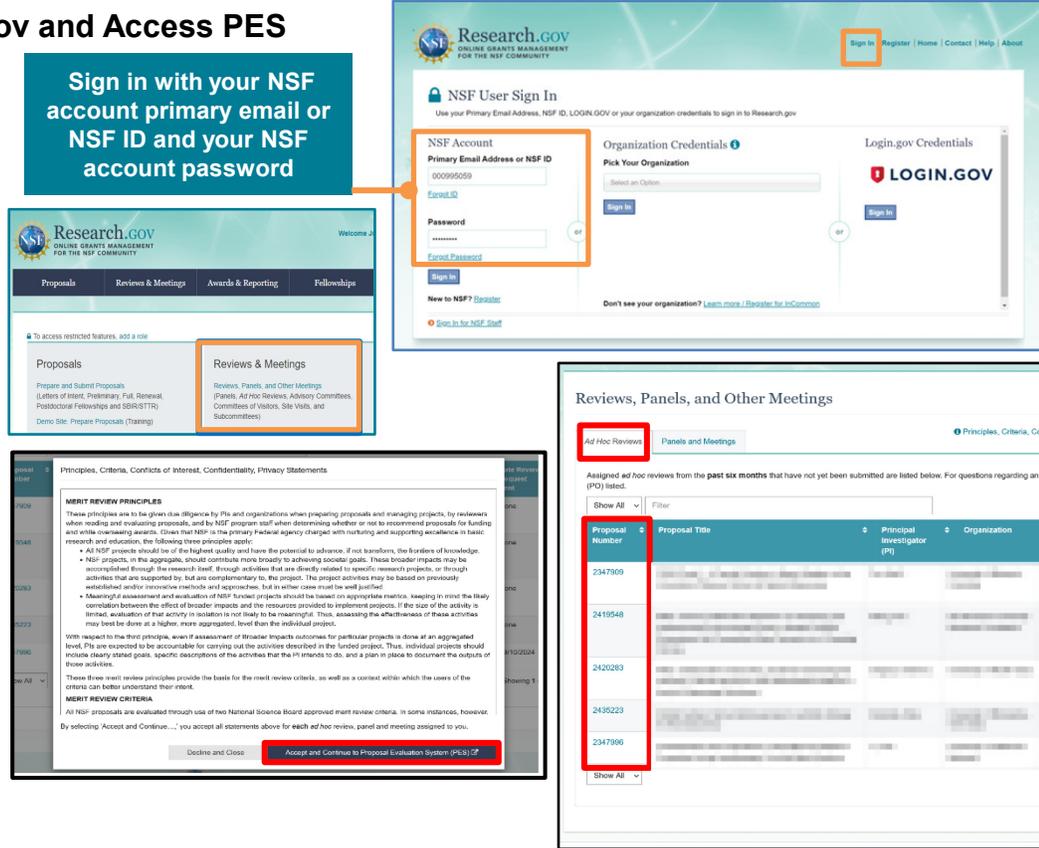
Invitation Code:
23805D1PAU

If you feel that you received this in error, please contact Peggy Miller at pmiller@nsf.gov.

PES Instructions

Step 1: Sign into Research.gov and Access PES

- Open [Research.gov](https://www.research.gov) using one of the recommended browsers: Chrome, Edge, Firefox, or Safari.
- Click **Sign In** located at the top of the screen to enter NSF account credentials.
- You will be on the Research.gov homepage after signing in.
- Click the **Reviews, Panels and Other Meetings** link under Reviews and Meetings.
- Select the *Ad Hoc Reviews* tab
- Select a Proposal Number
- Review the Merit Review Principles, Criteria, and Privacy Act and Public Burden Statements and click **Accept and Continue to Proposal Evaluation System (PES)**.

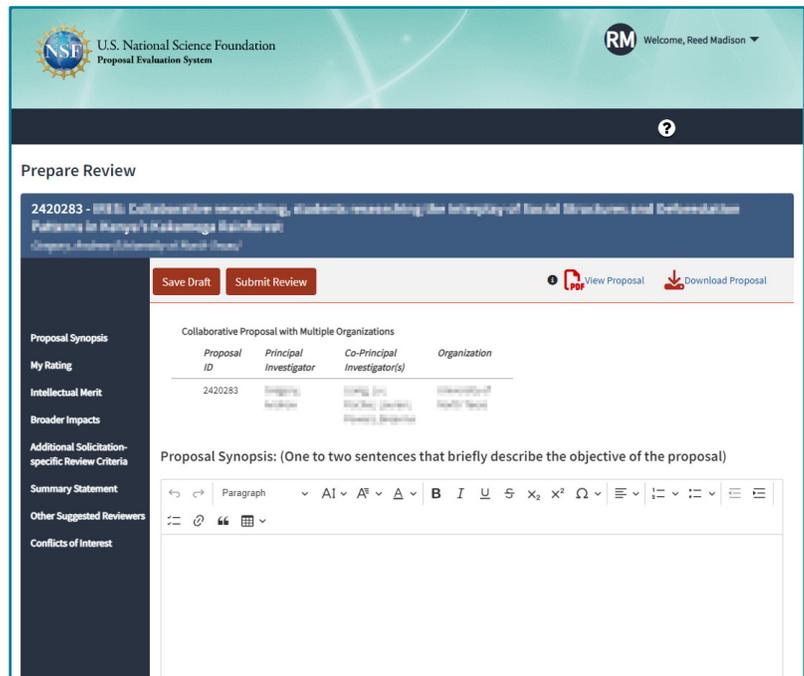


The screenshots illustrate the initial steps of the process. The first shows the Research.gov homepage with the 'Sign In' button highlighted. The second shows the 'NSF User Sign In' page where users enter their Primary Email Address or NSF ID and Password. The third shows the 'Reviews, Panels, and Other Meetings' section with the 'Ad Hoc Reviews' tab selected. The fourth shows a list of assigned ad hoc reviews with a table of proposal numbers and titles.

Proposal Number	Proposal Title	Principal Investigator (PI)	Organization
2347909			
2419548			
2420283			
2435223			
2347996			

Step 2: Prepare Your Proposal Reviews in PES

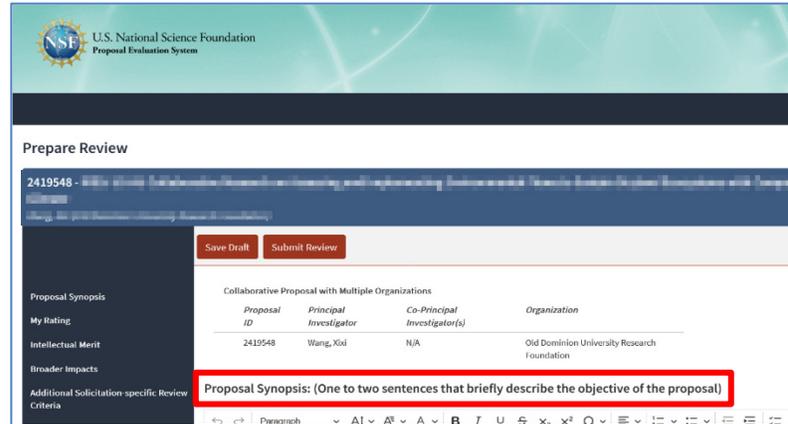
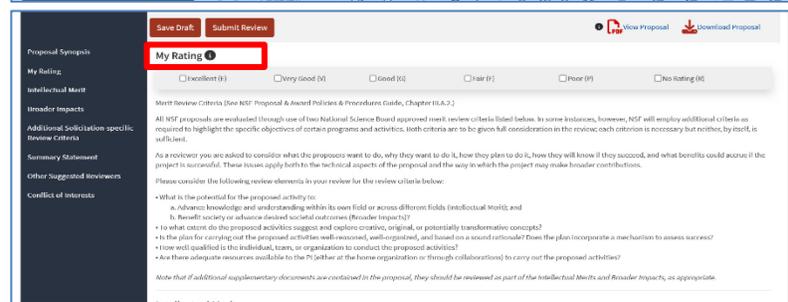
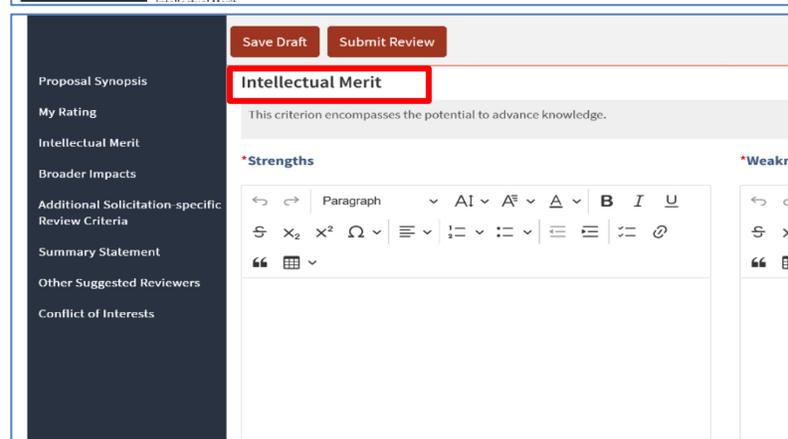
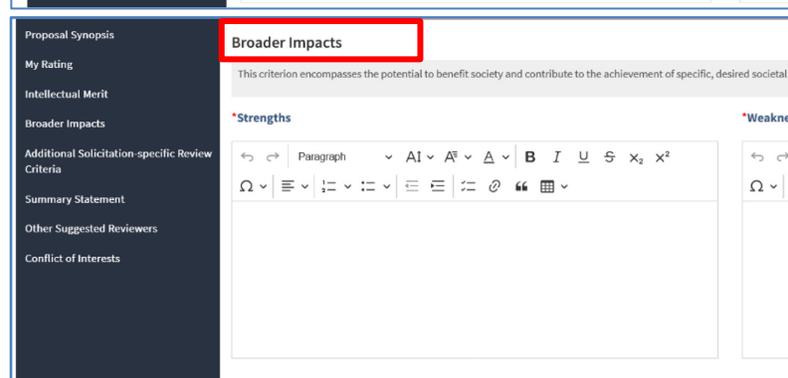
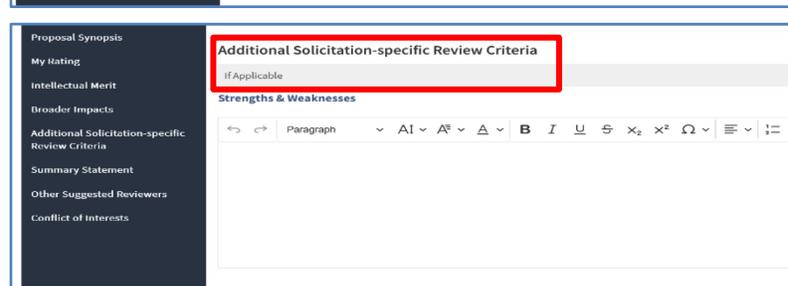
- Review the PES video tutorial and frequently asked questions (FAQs) on the Research.gov [About Proposal Evaluation System \(PES\)](#) page to help you navigate the new system.
- Prepare a response for each of the PES review form sections (an asterisk denotes default required fields):
 - Proposal Synopsis
 - My Rating
 - *Intellectual Merit
 - *Broader Impacts
 - Additional Solicitation-specific Review Criteria
 - Summary Statement
 - Other Suggested Reviewers
 - Conflict of Interest



The screenshot shows the 'Prepare Review' interface for proposal 2420283. It includes a 'Save Draft' and 'Submit Review' button, a 'View Proposal' link, and a table of proposal details. The 'Proposal Synopsis' section is highlighted, showing a text editor with a rich text toolbar.

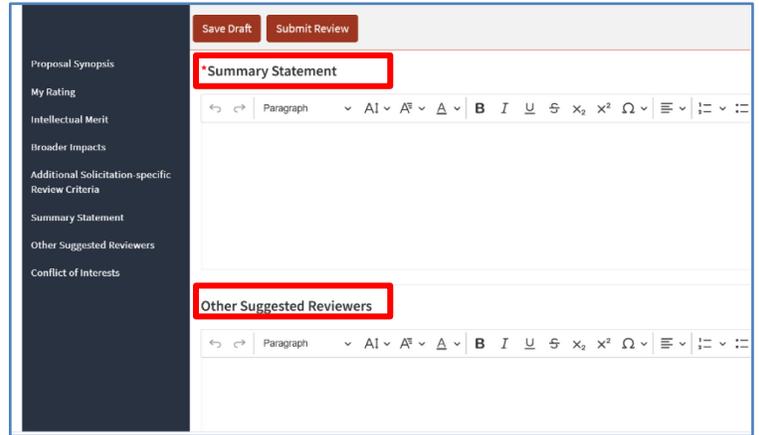
Proposal ID	Principal Investigator	Co-Principal Investigator(s)	Organization
2420283	Imprints Institute	James Kim, Charles Kim, Robert Kim	University of North Carolina

- If the proposal is a lead with “Collaborative Proposals”, the following information on the lead and collaborative proposal(s) will be displayed: Proposal Title, Proposal ID, Principal Investigator, co-Principal Investigator, and Organization.
- Select the Question Mark icon to navigate to the “[About Proposal Evaluation System](#)” page in Research.gov where you can access FAQs and other training resources.
- Click the View Proposal icon to view the proposal in a new tab and click on the Download Proposal icon to download the full proposal PDF.
- Note that all narrative fields have rich text formatting which allows you to add features such as underlines, strikethroughs, italics, bolding, and highlights. Symbols, superscripts, and subscripts are supported as are different font types and sizes. Use the toolbar to format your response and to add special characters. To eliminate potential copy-paste errors from Microsoft Word, use 'Ctrl + V' to paste copied content into the editor.
- In the top box, enter a brief proposal summary under the "Proposal Synopsis" section or leave it blank. This is an optional text box by default.
- Select a rating in the "My Rating" section. As a reference, PES provides the definition of each rating when hovering over the info tip. Assigned reviewers can rate the proposal with one or two ratings depending on the funding opportunity-specific template set by the managing NSF point of contact for the funding opportunity. You may also choose not to provide a rating. Select 'R' to indicate that you are only submitting a review and not a rating.
- Enter your review in the PES review form for the Intellectual Merit, Broader Impacts, and Additional Solicitation-specific Review Criteria (if section included) sections for the proposal. A red asterisk (*) indicates a required input field.
- The "Save Draft" button saves any reviews and/or ratings you have entered. Selecting 'Save Draft' will display the following warning message: "Your review has been saved, but it is not yet submitted to the system. Please click on the 'Submit Review' button."

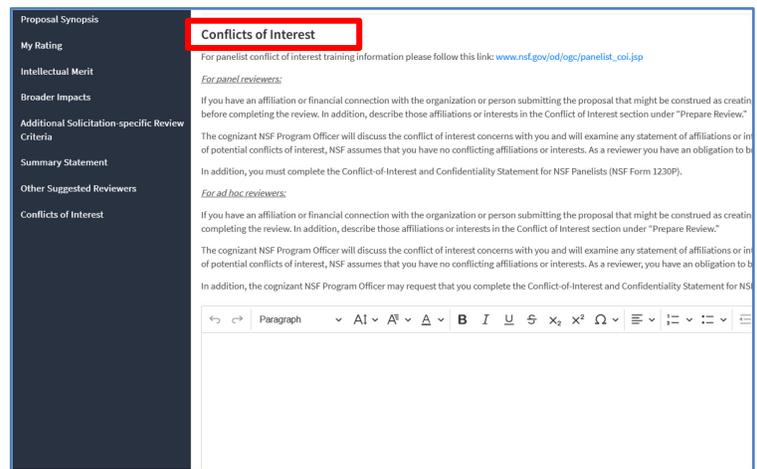






Step 3 : Submitting *Ad Hoc* Reviews in PES

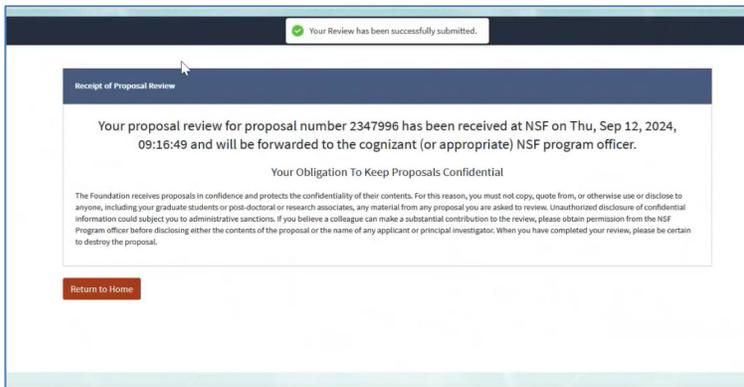
- Enter your review in the form for the Summary Statement, Other Suggested Reviewers, and Conflicts of Interest sections for each proposal. A red asterisk (*) indicates a required input field.
- The "Submit Review" button uploads the review and/or ratings in the system. The review may become visible during future panel discussions involving the proposal if the NSF managing Program Officer sets the meeting rules permissions to allow visibility. If you select "Submit Review" without checking a rating, PES will inform you that you have not rated the proposal and will ask if you would like to continue. You are encouraged to select a rating or select "No Rating (R)".
- Click 'Submit Review' to submit the *ad hoc* review in PES. **It is not possible to edit or change your *ad hoc* review after submission.**
- Following submission, you will see a screen with a message indicating that your review has been successfully submitted.
- Click Return to Home to Return to the Reviews, Panels, and Other Meetings page in Research.gov
- Following submission, an email will be sent to the *ad hoc* reviewer as well as to the managing PO of the proposal with the contents of the review.



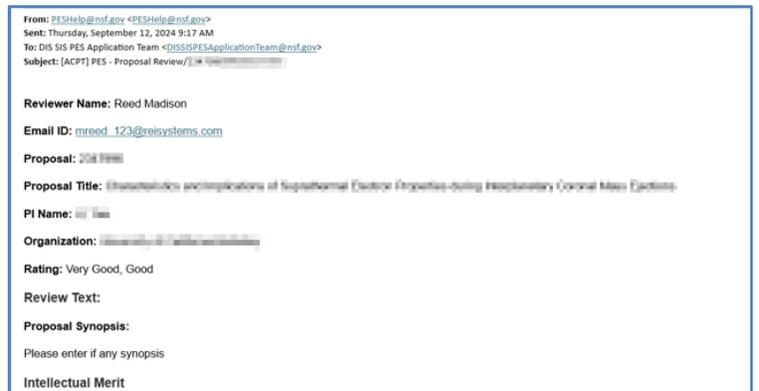
The screenshot shows the PES form interface. On the left is a navigation menu with items: Proposal Synopsis, My Rating, Intellectual Merit, Broader Impacts, Additional Solicitation-specific Review Criteria, Summary Statement, Other Suggested Reviewers, and Conflict of Interest. The main content area has two sections highlighted with red boxes: "Summary Statement" and "Other Suggested Reviewers". Both sections have a rich text editor with a toolbar containing options for Paragraph, text alignment, bold, italic, underline, link, and list creation.



The screenshot shows the PES form interface with the "Conflicts of Interest" section highlighted by a red box. The section contains instructions for panelist reviewers, including a link to a training page (www.nsf.gov/od/ogc/panelist_co.jsp) and detailed information about the cognizant NSF Program Officer's role in discussing conflict of interest concerns. The form also includes a rich text editor for providing details.



The screenshot shows a confirmation page titled "Receipt of Proposal Review". At the top, a green message box says "Your Review has been successfully submitted." The main text states: "Your proposal review for proposal number 2347996 has been received at NSF on Thu, Sep 12, 2024, 09:16:49 and will be forwarded to the cognizant (or appropriate) NSF program officer." Below this, there is a section titled "Your Obligation To Keep Proposals Confidential" with a warning about confidentiality. At the bottom, there is a "Return to Home" button.



The screenshot shows an email notification from PEShelp@nsf.gov. The header includes: From: PEShelp@nsf.gov <PEShelp@nsf.gov>, Sent: Thursday, September 12, 2024 9:17 AM, To: DIS SIS PES Application Team <DISSISPEApplicationTeam@nsf.gov>, Subject: [ACPT] PES - Proposal Review/Evaluation. The body of the email lists reviewer information: Reviewer Name: Reed Madison, Email ID: mreed_123@resystems.com, Proposal: 2347996, Proposal Title: Characterization and Implications of Superthermal Electron Properties during Interplanetary Coronal Mass Ejections, PI Name: [REDACTED], Organization: [REDACTED], Rating: Very Good, Good, Review Text: [REDACTED], Proposal Synopsis: Please enter if any synopsis, and Intellectual Merit: [REDACTED].

Additional Training Resources & Questions

Additional training resources including a video tutorial and FAQs are available on the Research.gov [About Proposal Evaluation System \(PES\)](#) page.

For IT system-related questions including reviewer profile and PES access, please contact the NSF IT Service Desk at 1-800-381-1532 (7:00 AM - 9:00 PM ET; Monday - Friday except federal holidays) or via rgov@nsf.gov. Non-technical questions about proposal reviews, etc. should be directed to the managing Program Officer for the proposal.