

Quick Start Instructions for Ad Hoc Reviewers Using the Proposal Evaluation System (PES)

The Proposal Evaluation System (PES) is the replacement for the submission of ad hoc reviews in FastLane. Ad hoc reviewers now access all reviewer functions in Research.gov.

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*) and follow the instructions to provide reviewer profile information. Once completed, you will be able to register for the meeting, access assigned proposals for review in PES, and on panel days sign in to the meeting to record your attendance.

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.

Additional Training Resources & Questions

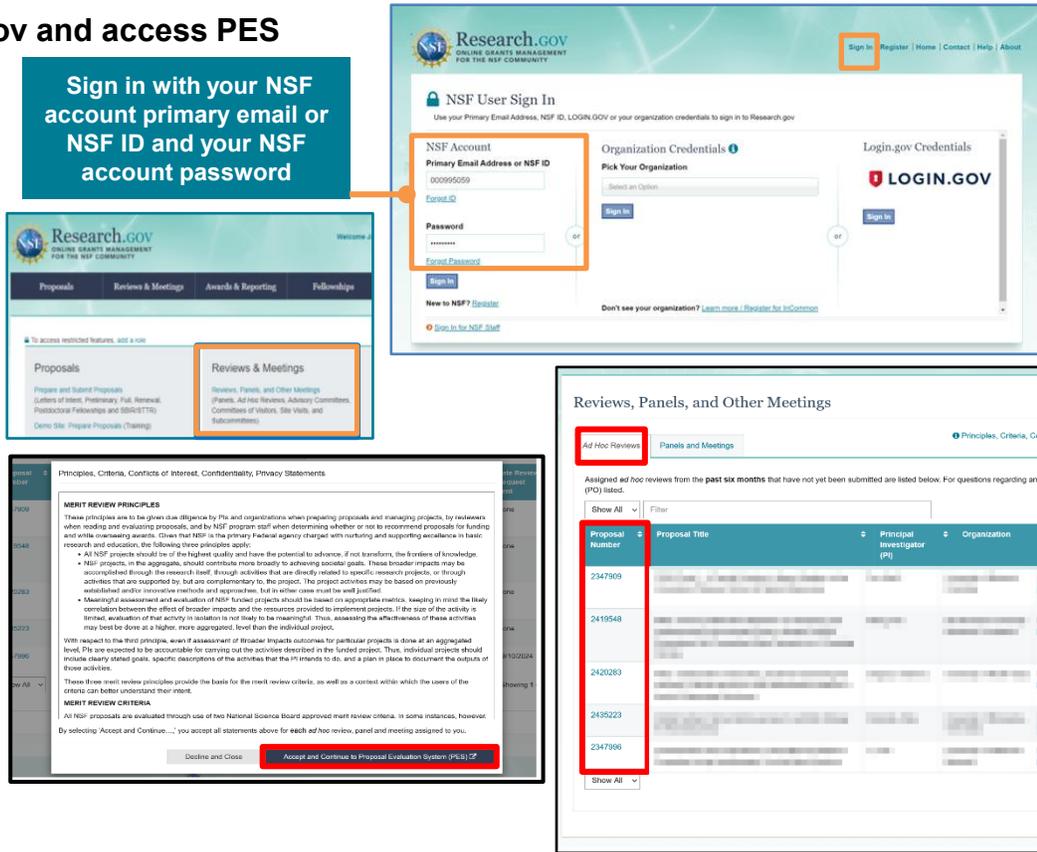
Additional training resources including a video tutorial and FAQs are available on the Research.gov [About Proposal Evaluation System \(PES\)](#) page.

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 system (IT) questions about proposal reviews, etc. should be directed to the managing Program Officer for the proposal.

PES Instructions

Step 1: Sign into Research.gov and access PES

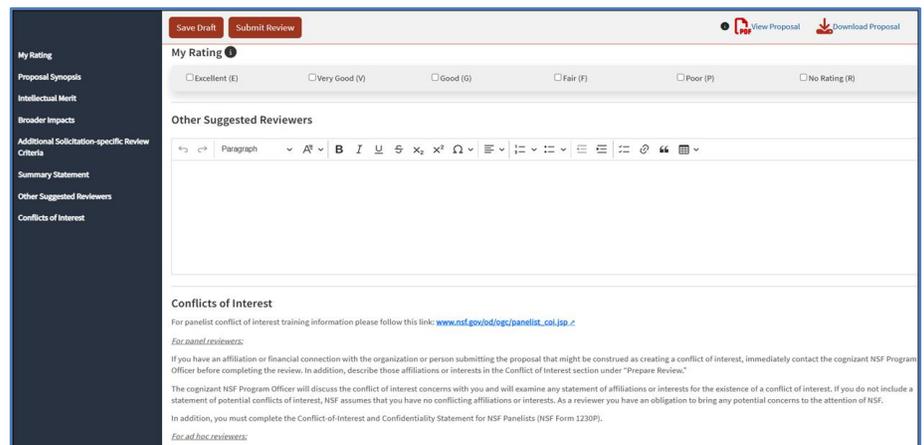
- Open [Research.gov](https://www.research.gov) using one of the recommended browsers: Chrome, Edge, Firefox, or Safari.
- Click **Sign In** located at the top of the screen to enter NSF account credentials.
- You will be on the Research.gov homepage after signing in.
- Click the **Reviews, Panels and 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)**.



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 *ad hoc* review form sections in PES, where * denotes a required field by default:

- My Rating
- Proposal Synopsis
- Intellectual Merit
- Broader Impacts
- *Additional Solicitation-specific Review Criteria
- Summary Statement
- Other Suggested Reviewers
- Conflicts of Interest
- *Intellectual Merit
- *Broader Impacts
- Additional Solicitation-specific Review Criteria
- *Summary Statement
- Other Suggested Reviewers
- Conflict of Interest



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- If the proposal is a lead with “Collaborative Proposals”, information on the lead and collaborative proposal(s) is displayed on the top row below the Prepare Review header: Proposal Title, Proposal ID, Principal Investigator, co-Principal Investigator, and Organization.
- The “About PES” icon will 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 formatting features such as underlines, strikethroughs, italics, bolding, and highlights. Symbols, superscripts, and subscripts are supported as well as different fonts. All responses will use the default paragraph font size and default black text color. Use the toolbar to format your response and add special characters. To eliminate potential copy-paste errors from Microsoft Word, use 'Ctrl + V' to paste copied content into the editor.
- 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 up to two ratings depending on the funding opportunity-specific template set by the managing NSF points 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. A warning message will display if an *ad hoc* reviewer does not include a rating.
- In the next box, enter a brief proposal summary under the "Proposal Synopsis" section or leave it blank. This is an optional text box by default.
- Enter your review in this form for the Intellectual Merit, Broader Impacts, and Additional Solicitation-specific Review Criteria, when included, 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 a warning message that says "Your review has been saved, but it is not yet submitted to the system. Please click on the 'Submit Review' button” **which can only be done one time.**

