

The Proposal Evaluation System (PES) is the replacement for the Interactive Panel System (IPS) module in FastLane. Panelists now access all reviewer functions in Research.gov and will no longer log into FastLane.

# Introduction: Providing Reviewer Profile Information

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

Panelists cannot access PES for proposal review activities or complete meeting registration in the Travel and Reimbursement System until these tasks are completed. Visit <u>Research.gov Account Management –</u> <u>Reviewer</u> for more information and training resources.

#### Each panelist must complete the following steps to access PES and register for the meeting:

- Open <u>Research.gov</u> 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 <u>Research.gov</u> 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 you can enter the email address
  NSF program staff used to email you about your meeting. 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.

#### From: noreply@nsf.gov <noreply@nsf.gov> Sent: Saturday, March 25, 2023 12:14 AM To: Apple, Anna <<u>AnnaTestApple@gmail.com</u>> Subject: NSF - Action Needed: Provide Reviewer Profile Information Dear Anna Apple, Instructions 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 **Invitation Code** 23805D1PAU If you feel that you received this in error, please contact Peggy Miller at pmiller@nsf.gov.

#### Example System-generated Provide Review Profile Information Email



### Prior to the Panel: Meeting Registration

All panelists and Federal Advisory Committee Act (FACA) meeting participants must complete a one-time process to provide reviewer profile information and register for their meeting in the Travel and Reimbursement system prior to the meeting. Follow the instructions in the email sent to you by program staff to initiate the reviewer registration process. View the <u>Provide Reviewer Profile Information</u> video and refer to the <u>Research.gov Account Management Reviewer</u> page for more information. To access the Travel and Reimbursement System, you will need to sign in to the Research.gov homepage at <u>www.research.gov</u>, click the Reviews, Panels, and Other Meetings link, and follow the instructions below. View the Tips for Reviewers video for additional guidance: https://tipsforreviewers.nsf.gov.

1	Sign in to the <u>Research.gov</u> homepage, then click on the "Reviews, Panels, and Other Mostings" link to be pavigated	Proposals  To access restricted fee	Reviews & Meetings	Awards & Reporting	Fellowships & Opportunities	Manage Financials	Administration
	to the "Reviews, Panels, and Other Meetings" page.	Proposals Prepare and Submit F (Letters of Intent, Prel Postdoctoral Fellowsh Demo Site: Prepare P	roposals minary, Full, Renewal, ips and SBIR/STTR) roposals (Fraining)	Reviews & Meetin eviews, Panels, and Other (Panels, Ad Hoc Reviews, A Committees of Visitors, Site Subcommittees)	<b>19S</b> Advisory Committees, Visits, and	Awards & Reportin Project Reports @ Demo Site: Project Reports Notifications & Requests @ Award Documents @ Supplemental Funding Requ	IG : (Training) ests (including Career-
	Reviews, Panels, and Other Meetings link					Life Balance) Demo Site: Supplemental F (Training)	Funding Requests

In the Reviews, Panels, and Other Meetings screen, click Panels and Meetings:

Proposals Re- Hame - Reviews, Panals, and Other Meet Reviews, Panals, a	views & Meetings Awards & Reporting	Fellowships & Manage Fi Opportunities	nancials Administration		
Assigned Ad Hoc reviews from th	e past six months that have not yet been submitted are lis	led below. For questions regarding an assigned	I review, contact the Program Officer		Panels and Meetings
(PO) listed. Show All  Filter			Showing 0 - 0 of 0		
Proposal Number Pro	posal Title Principal Investigator (PI) Or	panization Program Officer (PO)	Date Review Request Sent		
	There are current	y no reviews			
Show All 🗸			Showing 0 - 0 of 0		

3

In the Panels and Meetings tab, click the Meeting ID for the panel or meeting you have been invited to participate in by NSF staff:

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ws	Panels and Meeti	ngs						e	B Reviews and Meeting Typ
Select a Meet	ting ID below to re year following the	gister or check-in for the meeti meeting. For questions regard	ing, prepare your r ding a meeting, co	review, join your vir intact the Program	tual meeting, or sut Officer (PO) listed.	mit informatio	on for travel or	reimbu	irsement. Meetings are
how All	✓ All Meeting	s v	Filter						Showing 1 - 5 of 5
Meeting ID	Meeting Na	me	٠	Program Office	r (PO)	٥	Meeting Status ①	•	Meeting Date(s) 🗘
P242646	Panel: Mee	ting after ACPT refresh					Active		07/05/2024 - 07/26/2024
242656	Panel: FLTF	R SSO - Current Meeting			-		Active		08/20/2024 - 07/13/2024
P242657	Panel: FLTF	R SSO - Future Meeting					Upcoming		07/31/2024 - 08/08/2024
P242655	Panel: FLTF	R SSO - Past Meeting					Past		06/24/2024 - 06/27/2024
P242650	Panel: Past	Meeting after ACPT refresh					Past		06/24/2024 - 06/25/2024

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# Prior to the Panel: Meeting Registration

After clicking on the panel or meeting, you are taken	Meeting: Panel - P242656				
to the Meeting Details page with instructions and links.	Name: FLTR SSO - Curren Type: Meeting: Panel Meeting Date(s) Program Officer:	4 Meeing Meeing Statu: Active			
	Helpful Links Meetings at NSF Help C	Steps for the Meeting			
	Virtual Panelist Survey 2*	Prior to the Meeting			
	Guidance for Reviewers of CAREER Proposals (2)	Review legal notices: Merit Review Principles, Merit Review Criteria, and Privacy Act and Public Burden Statements			
		Register for Meeting, provide banking information for reimbursement, and make travel arrangements: Travel and Reimbursement 🗷			
Click Travel and Reimbursement.		Download Conflicts of Interest Form 1230P C			
		Access proposals and prepare reviews: Proposal Evaluation System 2			
		Day(s) of the Meeting and Following			
		Check into the meeting daily: Meeting Attendance Check-In 🕃			

5 You will be directed to a page titled Travel and Reimbursement | MAIN.

There are two steps to the meeting registration process. In Step 1, you will answer the Participant Registration Questions. In Step 2, you will verify your personal banking information and provide travel details, if applicable.

**Note:** NSF has created a Reviewer Orientation Briefing video to assist you in completing the proposal review process. Click on this button to view this video first if you have not viewed it in the past 12 months. Otherwise, skip to Step 1 of the registration process. Click on the link labeled Step 1 "Participant Registration Questions."

Research.gov Politific dawn's MANAGIMINT Politific dawn's MANAGIMINT Travel and Reimbursement ( 1940)	Sign Out Disone)   Context   Heatings at HOF Holy   Alexat	Reviewer Orientation Briefing
This website will enable you to input personal and banking information required for reimbursement and to make travel arrangements. Use of this	Participant Name: Slater, Philip Meeting 10:5248955	video Button
system will expedite the processing of your travel reimbursement. To begin the process, we have a few questions you need to answer. If you have	NSF has created an orientation video to assist you in completing the proposal review process. If you have not watched this video in the rate of the review process. the video before starting the review process.	
questions, please contact the following meeting contact, <u>pbhardwagensf.gov</u> who will be able to assist you.	When you click the link to start the video, a window will appear requesting your name and email address. Dust information helps hSF understand who has received the orientation. NSF staff should enter their NSF email address. During the video, you will also be associated answer three simple quiz cuestions. If you have questions, please emails pare/who@insf.gov.	
The next screen will allow you to enter or update your home address and financial institution information for our financial system. This is required by the Debt Collection Improvement Act our 1996 to transmit your total reimbursement electronically to the institution of your choice. This law also requires that you provide your social security number.	Crientation video:     The Art and Science of Reviewing Proposals (?	Step 1
Your social security number will be in a secure database with limited access. Submission of this information is voluntary, however it is required for payment.	You are required to validate your personal and banking information for each meeting you attend.	
It is a federal travel regulation that all travel arrangements must be made through NSF's travel agent via 855-696-7941 or <u>nsf@clazumano.com</u>	In order for NSF to reimburse you, please complete the registration process by clicking on Step 2 helewer validate your personal and banking	
	Pericipant Registration Question     Perical Banking/Contact Information	Step 2 (if applicable)
		(il applicable)

After clicking on the link for Step 1, you will be directed to the Participant Registration Questions where you will complete the Participant Registration questionnaire. Please answer all questions truthfully and certify by clicking on Continue. In Step 2, in the screens that follow, if applicable, you will be asked to verify your Social Security Number and provide personal contact information and banking information. This information is required so that NSF may process your reimbursement/compensation.

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Travel and Reimbursement   New Triticiant Instantion		
To brain the process select PLS or NO to ensure the spectrum	(3) Participant Registration Questions	
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Participants who do not have an account with a US Finandial Institution will not be extended advertised rule:	1. Do you have a U.S. Social Security members	🗮 905 - C 80
Participants who live in the US are required to provide banking	3. Are you a U.S. Federal Government Employee*	O 944 8 80
information or they will not be pain.	California di Factoria Refectanti	
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	8. Do you have a week a continue two requires alteriar server have settedned over note (or, sited over, haddend, or other experience) and the context of the setted over th	16
	Name the above questions apply only to individuals with qualified disabilities.	
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	we dicking continue, a bondue certify that a have answered all the savestions above much also to the best of my interviewes.	CA AVM

Select the Continue button and follow the system prompts to complete Step 2, if applicable.

**Note:** For more detailed instructions about registering using Travel and Reimbursement, go to "Meetings at NSF" at <u>https://new.nsf.gov/about/meetings</u> and select your type of visit.

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# **On Panel Days: Meeting Sign-In**

NSF Federal Advisory Committee Act (FACA) meeting participants are required to sign in and record their meeting attendance daily in Meeting Sign-in. You must have completed the one-time process to provide reviewer profile information to sign into the meeting. View the <u>Provide Reviewer Profile</u> <u>Information</u> video and refer to the <u>Research.gov Account Management Reviewer</u> page for more information. To access Meeting Sign-in, you will need to sign in to the Research.gov homepage at <u>www.research.gov</u>, click the Reviews, Panels, and Other Meetings link, and then follow the instructions below.

Sign in to the Research.gov Fellowships & Opportunities Reviews & Meetings Awards & Reporting Manage Financials Administration Proposals homepage, then click on the "Reviews, Panels, and Other To access restricted features, add a role Meetings" link to be navigated **Reviews & Meetings** Awards & Reporting Proposals to the "Reviews, Panels, and Prepare and Submit Proposals (Letters of Intent, Preliminary, Full, R eviews, Panels, and Other Meetings Panels, Ad Hoc Reviews, Advisory Con Project Reports Other Meetings" page. Demo Site: Project Reports (Training) Postdoctoral Fellowships and SBIR/STTR Committees of Visitors, Site Visits, and Subcommittees) Notifications & Requests Demo Site: Prepare Proposals (Training) Award Documents Proposal Status Reviews, Panels, and Other ntal Funding Requests (including Caree Life Balance) Meetings link Site: Su ntal Funding Re

In the Reviews, Panels, and Other Meetings screen, click Panels and Meetings:

Home	Proposals Reviews, Panels, and Other I	Reviews & Meetings Meetings	Awards & Reporting	Fellowships & Opportunities	Manage Financ	als Administration
Re	eviews, Panels	s, and Other N	leetings			
R J	Assigned Ad Hoc reviews fro	om the past six months th	hat have not yet been submitted an	e listed below. For question	s regarding an assigned revie	Contact the Program Officer
[	Show All 👻 Filter					Showing 0 - 0 of 0
	Proposal Number	Proposal Title Pri	incipal Investigator (PI)	Organization Prog	ram Officer (PO) Da	e Review Request Sent
	Show All 👻		There are cun	rently no reviews		Showing 0 - 0 of 0

<sup>3</sup> In the Panels and Meetings tab, find and click the panel or meeting you need:

Reviews Pan	tels and Meetings			Reviews and Meeting Type		
Select a Meeting listed for one yea	ID below to register or check-in for the meeting, prepar ar following the meeting. For questions regarding a mee	re your review, join your virtual meeting, or subr ting, contact the Program Officer (PO) listed.	nit information for travel or reim	oursement. Meetings are		
Show All 👻	All Meetings			Showing 1 - 5 of 5		
Meeting ≎ ID	Meeting Name	Program Officer (PO)	♦ Meeting ↑ Status ●	Meeting Date(s) 🗘		
P242646	Panel: Meeting after ACPT refresh		Active	07/05/2024 - 07/26/2024		
P242656	Panel: FLTR SSO - Current Meeting		Active	00/20/2024 - 07/10/2024		Specific p
P242657	Panel: FLTR SSO - Future Meeting		Upcoming	07/31/2024 - 08/08/2024	_	
P242655	Panel: FLTR SSO - Past Meeting		Past	06/24/2024 - 06/27/2024		
P242650	Panel: Past Meeting after ACPT refresh		Past	06/24/2024 - 06/25/2024		



# **On Panel Days: Meeting Sign-In**



Review your Reimbursement Profile and complete the sign-in process. Step 1. Step 2. Research.gov ONLINE GRANTS MANAGEM FOR THE NSF COMMUNITY ting Sign-in You must sign-in to this meeting in order to be eligible for rei Hello Reimbursement Protect Please sign-in If your R please d Welcome ! How did you travel to the n is page to sign in for each day of the g. Please select your mode of ortation to and from the meeting and the riate attendance type and click Sign-in. Personally Owned Vehicle Call Burshared Co O Other O Not Applicable O Local Transportation will you return from t O Personally Owned Vehicle O NSF Purchased Commercial Air/Rail O Self Purchased Commercial Air/Ra Step 3. Other ing Attendance MEETING DATE 06/28/2024 Not Available 06/29/2024 Not Available 06/30/2024 Not Available 07/01/2024 Not Available 07/16/2024 able 07/17/2024 railable 07/18/2024 07/19/2024 Sign-i Step 5. Step 4.

- 1. Review your Reimbursement Profile. The Meeting Sign-in screen will display your current registration status as well as the type of reimbursement for which you are eligible. This status was determined when you registered for the meeting in Research.gov. For more information on the meaning of a term, click on the corresponding hyperlink.
- If your reimbursement profile is incorrect, click the link to update your answers to the registration questions.
- 3. Select your mode of transportation to and from the meeting, and your Attendance Type for the current day.
- 4. Click Sign-in, to complete the meeting process for that day.
- 5. The system will display a confirmation message. You can close the tab or window to return to the meeting details page.



Quick Start Instructions for Panelists Using the Proposal Evaluation System (PES)

# **PES Instructions**



#### Step 2: Prepare Your Proposal Reviews in PES

- Review the PES video tutorial and frequently asked questions (FAQs) on the Research.gov <u>About Proposal</u> <u>Evaluation System (PES)</u> page to help you navigate the new system.
- Access assigned proposals to prepare for panel and/or submit your reviews.
- Click the Full Proposal PDF icon in the Actions column to view in a new tab and download the full proposal PDF.
- Click the Edit Review icon in the Actions column to be directed to the Prepare Review page.
- Follow the instructions provided by your Program Officer regarding submission of individual reviews.

Full Proposal PDF icon

Edit Review icon

Panel- 0741168- DFS	May Delesse Demo (14	130   04/20/2024 to 05/10/2024
Actions	Discussion Order	Panel Summary Stage
•	1	Approved
•	2	Ready for Approval
•	3	Approved
• 🕞 g 2/	4	Not Started
•	5	Ready for Comments
•		Not Started
• . 6	7	Not Started
• C 🕑 🗁	8	Not Started
•	9	Not Started
< ∩ αℓ +.		Not Startad

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Expand

#### 3 : Accessing Other Reviews in PES Step

- · Click the caret to the left to access additional Proposal car information not shown in the Proposal row. Once expanded, the Review column on the right side allows you to select and view reviews from the other panelists, as allowed by the panel meeting rules.
- If the proposal is a lead with "Collaborative Proposals," information on the lead and collaborative proposal(s) will be displayed: Proposal Title, Proposal ID, Principal Investigator, co-Principal Investigator, and Organization. The box on the right will show the name and organization of panelists who have conflicts of interest with a particular proposal. The lower section displays reviewer information, including Panelist Name, Organization, Review Rating, and Review. Ad hoc and other reviews are also available as applicable.
- Click on the "View Panelist Review" icon to open a new tab to read the review (read-only).
- If you do not see a review from a specific panelist, it could be that the panelist has not checked a rating or clicked the "Submit to System" button to make it visible to others, or that the meeting rules prevent panelists from viewing reviews of others at the time in which you are checking (e.g., prior to the panel).

ę	anel: P241168: P	ES May Release Demo 04/3	0   04/29/2024 to 05/30/2
4	Actions	Discussion Order	* Panel Summary Stage
•	. Co	1	Approved
•	R.CO	2	Ready for Approval
Þ	C.CO	3	Approved
,	CC2		Not Started
٠	C.C.*/	5	Ready for Comments
٠	LC2		Not Started
٠	C.CO	1	Not Started
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Actions Discussion Order $ear$ Comments By $ear$ Proposal ID $ear$ Principal Investigator $ear$ Proposal Title $ear$ Conflict of Interest $ear$ Organization $ear$ Lead Panelist $ear$
Proposal:
Collaborative Proposal with Multiple Organizations
Proposal         Principal         Co-Principal         Organization           ID         Investigator         Investigator(s)         The second secon
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#### Step 4: Use PES to Access Reviews and to Collaborate on the Panel Summary

- During the panel, panelists use PES to access reviews and proposals as well as to write, edit, comment on, and approve the panel summary.
- Click on the Panel Summary icon from the Actions column on the Proposal List page to access the panel summary. When hovering over the icon, the Scribe will see a figure with a pencil icon and the text "Prepare Panel Summary." Other panelists will see the text "Panel Summary" with the document icon.
- When writing the panel summary, the Scribe types into the panel summary window. Changes are automatically saved when typing.
   When the the panel summary draft is ready for others to comment on, the Scribe clicks the Submit for Comments button.
- To provide panel summary feedback to the Scribe, non-conflicted participants can:
  - Type edits directly in the panel summary which will display as a track change that the scribe must accept or reject.
  - Highlight panel summary text, click the "Comment" button (upper left plus sign on the toolbar, see figure in next page) and then click on the green check to submit. A listing of who has commented on the panel summary is available on the Proposal List page under the column 'Comments By'.



- The scribe makes edits to the panel summary and resubmits it for comments (i.e., accepts or rejects all changes and resolves all comments). Once there is a clean copy, then the scribe clicks the Submit for Comments button again.
- When everyone is done with comments, they can signal to the Program Officer and scribe during the panel that they are done. This is done outside of PES (e.g., via Zoom chat). The Program Officer may have additional panel summary changes for the Scribe to make.
- If the Program Officer directs the scribe to make additional changes, the scribe can make those changes with track changes turned off (scribe clicks on the pencil icon on the toolbar in the upper left of the document to turn off track changes, see figure in next page) and will click the Submit for Comments button a third time. This produces a clean, updated copy in the system.
- The Program Officer will check that the Recommendation and the clean copy are good to proceed.
- The Program Officer will direct authorized panelist(s) to click the Agree with Panel Summary button at the top.
- After all assigned panelist(s) to a proposal agree with the panel summary, then the authorized panelist(s) or NSF staff will be able approve the panel summary using the **Approve** button.



# Quick Start Instructions for Panelists Using the Proposal Evaluation System (PES)

Panel Summary		Return to Proposal List Page
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Stage: Panel Meeting   Panel Meeting Start - End:	05/06/2024 - 05/31/2024	
	Save Changes Submit for Comments 1 Not Started	Full Proposal 🙊 My Notes
Panel Summary	Panel Summary	
Recommendation		
Approvals		
1 connected user (me)		
<ul> <li>↔ ↔ ⊕ ♥ ♥</li> <li>Undo (Ctrl+Z) Comment</li> <li>Redo (Ctrl+Y) Track cha</li> <li>Comments archive</li> </ul>		Insert table
📑 🗸 Paragraph	~ <i>\</i>	
Track changes	The scribe can click to disable track changes when typing	
Accept all suggestions		
Accept all selected sugge	stions The scribe can click to accept all suggestions at once, accept only those	
Discard all suggestions	selected, reject all suggestions, or reject only those selected	
Discard all selected sugge	estions 🧉	

#### **Additional Training Resources and Questions**

Additional training resources including a video tutorial and FAQs are available on the Research.gov <u>About</u> <u>Proposal Evaluation System (PES)</u> page.

For IT system-related questions including reviewer profile, PES access, and meeting sign-in questions, 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 <u>rgov@nsf.gov</u>. Non-technical questions about proposal reviews, panel summaries, etc. should be directed to the panel's managing Program Officer.