

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 [Research.gov Account Management – Reviewer](#) for more information and training resources.

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

- 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 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.

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:

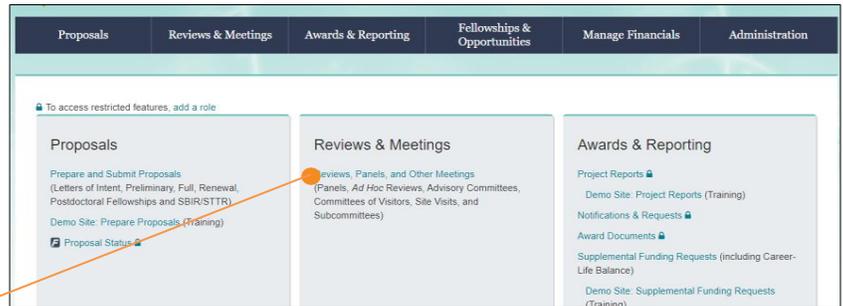
23805D1PAU

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

Prior to the Panel: Meeting Registration

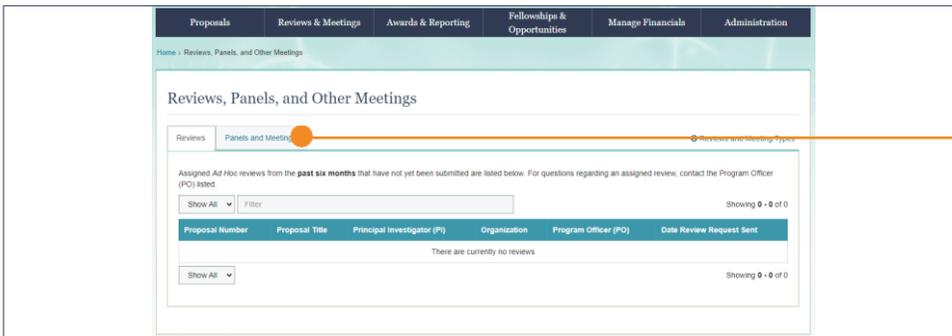
All panelists and Federal Advisory Committee Act (FACA) meeting participants must complete a one-time process to provide reviewer profile information and register for their meeting in the Travel and Reimbursement system prior to the meeting. Follow the instructions in the email sent to you by program staff to initiate the reviewer registration process. View the [Provide Reviewer Profile Information](#) video and refer to the [Research.gov Account Management Reviewer](#) page for more information. To access the Travel and Reimbursement System, you will need to sign in to the Research.gov homepage at www.research.gov, 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 [Research.gov](#) homepage, then click on the “Reviews, Panels, and Other Meetings” link to be navigated to the “Reviews, Panels, and Other Meetings” page.



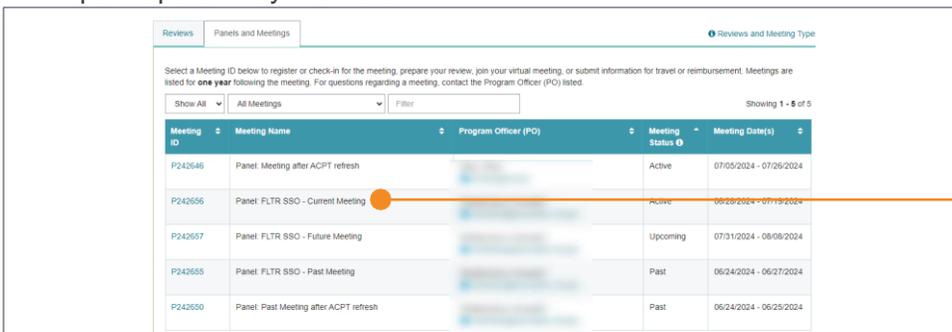
Reviews, Panels, and Other Meetings link

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



Panels and Meetings

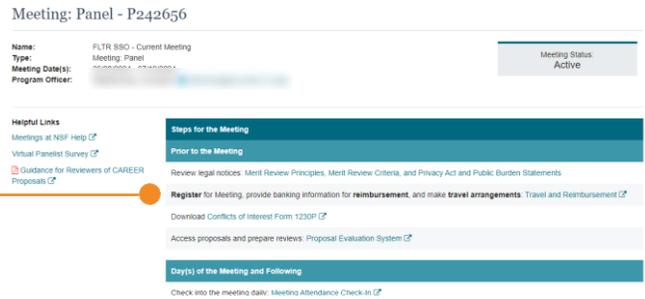
- 3 In the Panels and Meetings tab, click the Meeting ID for the panel or meeting you have been invited to participate in by NSF staff:



Specific panel

Prior to the Panel: Meeting Registration

4 After clicking on the panel or meeting, you are taken to the Meeting Details page with instructions and links.

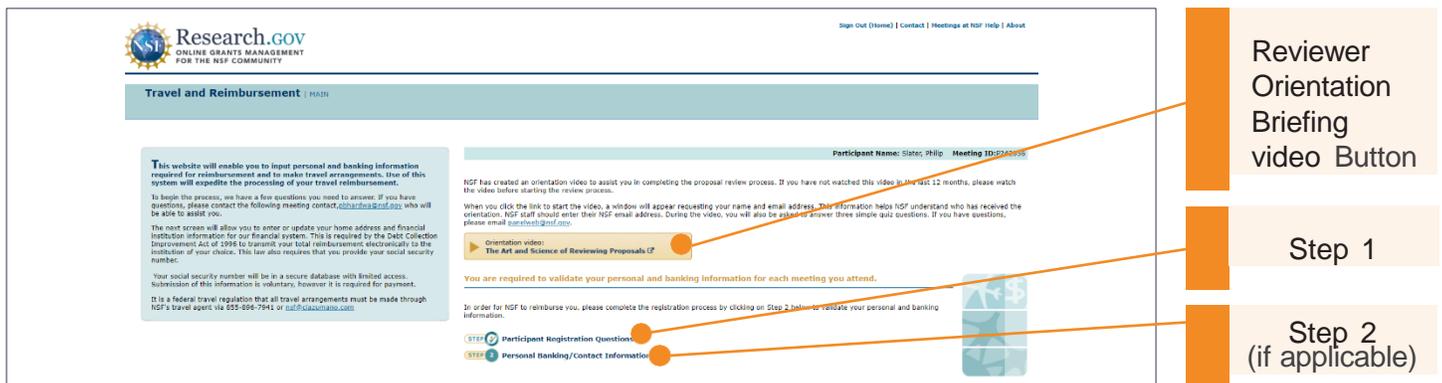


Click **Travel and Reimbursement**.

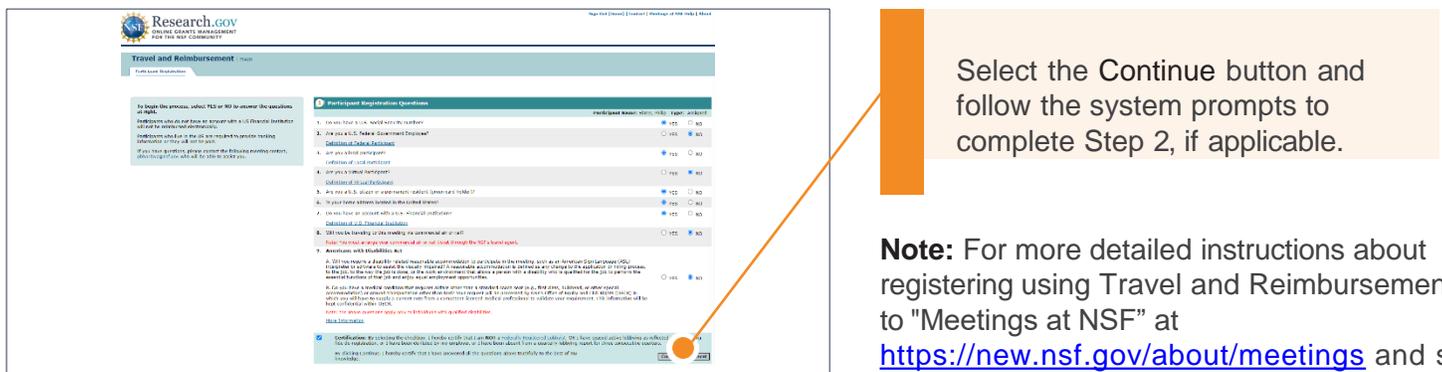
5 You will be directed to a page titled Travel and Reimbursement | MAIN.

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."



6 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.



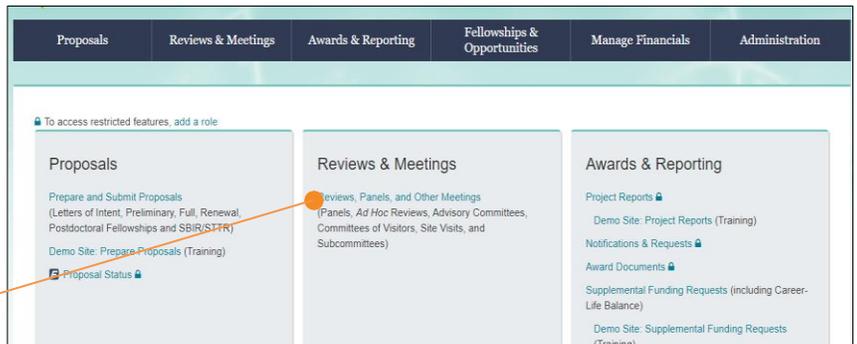
Note: For more detailed instructions about registering using Travel and Reimbursement, go to "Meetings at NSF" at <https://new.nsf.gov/about/meetings> and select your type of visit.

On Panel Days: Meeting Sign-In

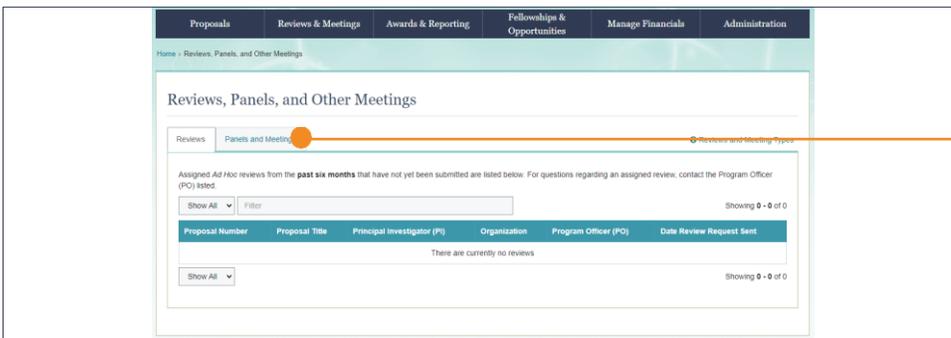
NSF Federal Advisory Committee Act (FACA) meeting participants are required to sign in and record their meeting attendance daily in Meeting Sign-in. You must have completed the one-time process to provide reviewer profile information to sign into the meeting. View the [Provide Reviewer Profile Information](#)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

- 1 Sign in to the [Research.gov](#) homepage, then click on the “Reviews, Panels, and Other Meetings” link to be navigated to the “Reviews, Panels, and Other Meetings” page.

Reviews, Panels, and Other Meetings link

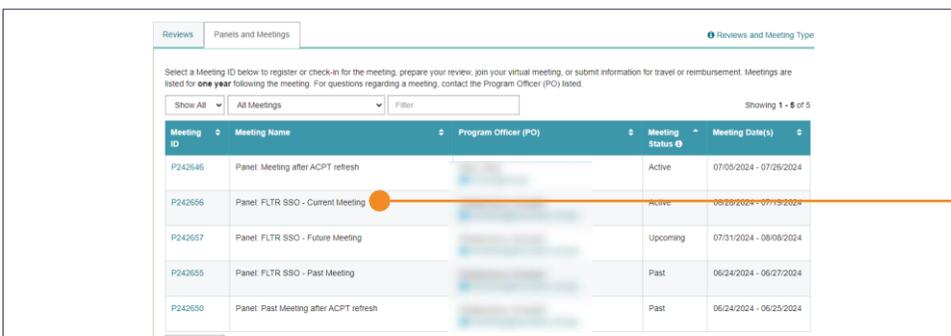


- 2 In the Reviews, Panels, and Other Meetings screen, click Panels and Meetings:



Panels and Meetings

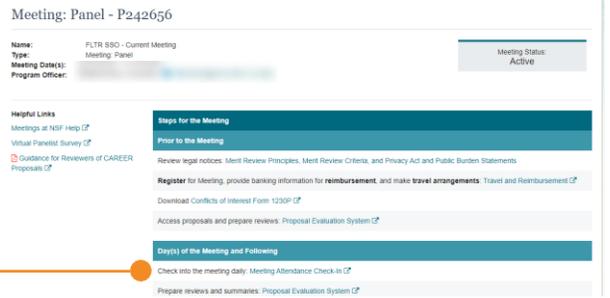
- 3 In the Panels and Meetings tab, find and click the panel or meeting you need:



Specific panel

On Panel Days: Meeting Sign-In

- 4 After clicking on the panel or meeting, you are taken to the Meeting Details page with instructions and links.



Meeting: Panel - P242656

Name: FLTR 850 - Current Meeting
Type: Meeting, Panel
Meeting Date(s):
Program Officer:

Meeting Status: Active

Helpful Links

- Meetings at NSF Help
- Virtual Panelist Survey
- Guidance for Reviewers of CAREER Proposals

Steps for the Meeting

Prior to the Meeting

- Review legal notices, Meet Review Principles, Meet Review Criteria, and Privacy Act and Public Burden Statements
- Register for Meeting, provide banking information for reimbursement, and make travel arrangements, Travel and Reimbursement
- Download Conflicts of Interest Form 1230P
- Access proposals and prepare reviews: Proposal Evaluation System

Days of the Meeting and Following

- Check into the meeting daily: Meeting Attendance Check-in
- Prepare reviews and summaries: Proposal Evaluation System

- 5 Review your Reimbursement Profile and complete the sign-in process.



Step 1.

Step 2.

Step 3.

Step 4.

Step 5.

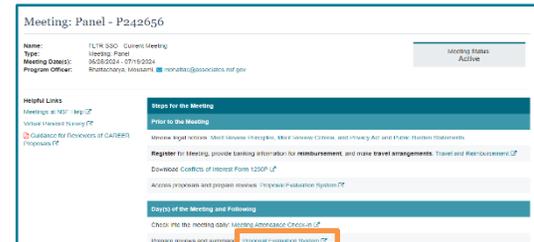
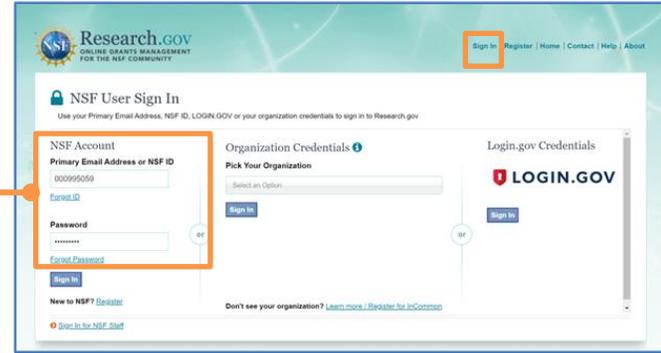
1. Review your Reimbursement Profile. The Meeting Sign-in screen will display your current registration status as well as the type of reimbursement for which you are eligible. This status was determined when you registered for the meeting in Research.gov. For more information on the meaning of a term, click on the corresponding hyperlink.
2. 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.

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 Panels and Meetings tab
- Select a Meeting ID
- Review the Merit Review Principles, Merit Review Criteria, and Privacy Act and Public Burden Statements and click **Accept and Continue**
- Click the **Proposal Evaluation System** link under the Day(s) of the Meeting and Following header.

Sign in with your NSF account primary email or NSF ID and your NSF account password



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.
- 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

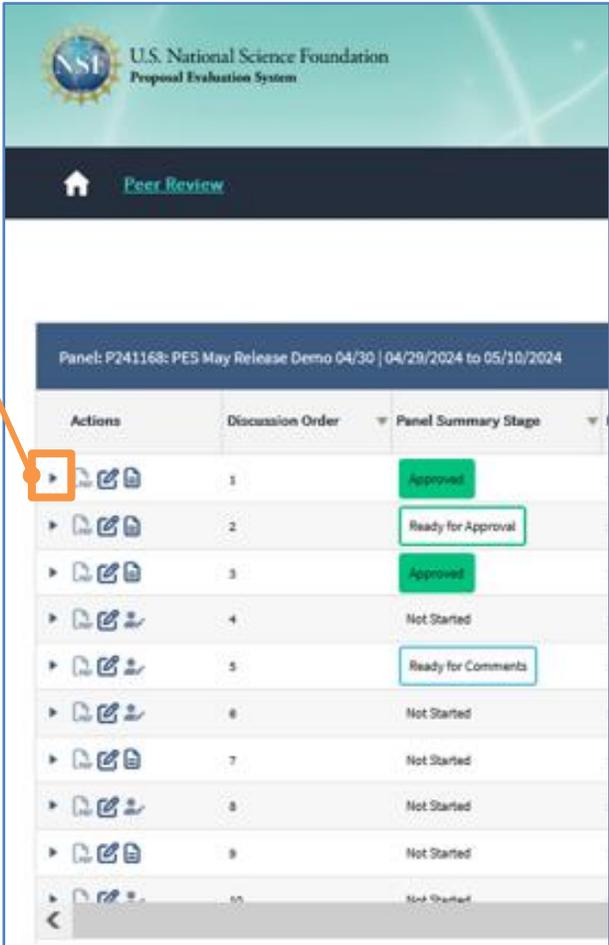
Edit Review icon

Actions	Discussion Order	Panel Summary Stage
	1	Approved
	2	Ready for Approval
	3	Approved
	4	Not Started
	5	Ready for Comments
	6	Not Started
	7	Not Started
	8	Not Started
	9	Not Started
	10	Not Started

Step 3 : Accessing Other Reviews in PES

- Click the caret to the left to access additional 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).

Expand Proposal car



Panel: P242395: PES Approval Rules Validation - III | 05/07/2024 to 05/22/2024

Actions	Discussion Order	Comments By	Proposal ID	Principal Investigator	Proposal Title	Conflict of Interest	Organization	Lead Panelist
	1			in Ping	Collaborative Proposal with Multiple Organizations	N/A	University of Texas at Austin	Sherry Liu

Proposal: Collaborative Proposal with Multiple Organizations

Proposal ID	Principal Investigator	Co-Principal Investigator(s)	Organization
Lead	in Ping	in Ping	University of Texas at Austin
	in Ping	in Ping	University of Texas at Austin

Users with Conflict of Interest

Panelist Name	Organization
No information	

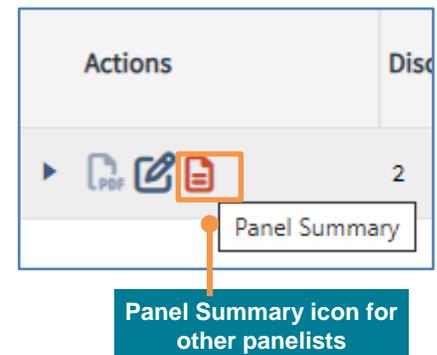
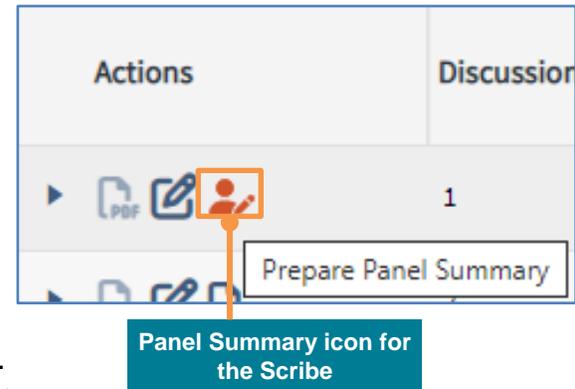
Panelist Name	Organization	Review Rating	Review
Sherry Liu	University of Texas at Austin	F/G	
in Ping	University of Texas at Austin	G/N	
in Ping	University of Texas at Austin	F	

Other Reviewer Name	Organization	Review Rating	Review View Concatenated Ad Hoc Reviews
in Ping	University of Texas at Austin	G	
in Ping	University of Texas at Austin	F/G	

View Panelist Review

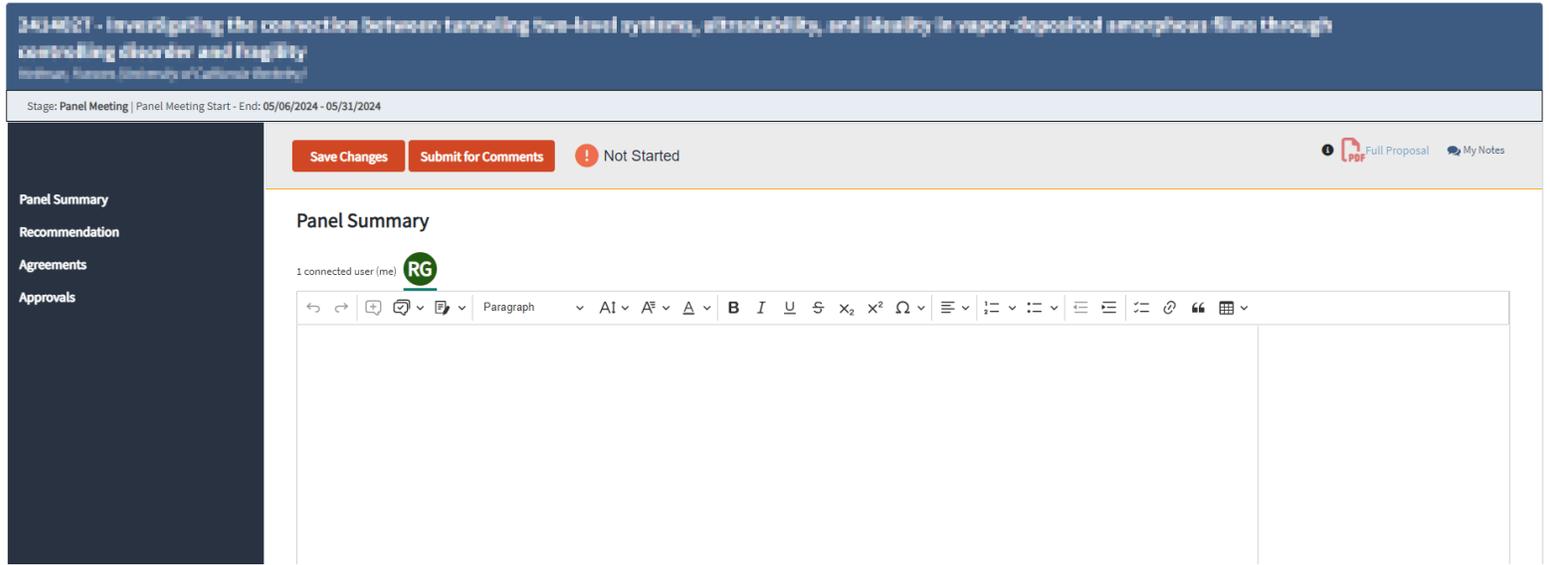
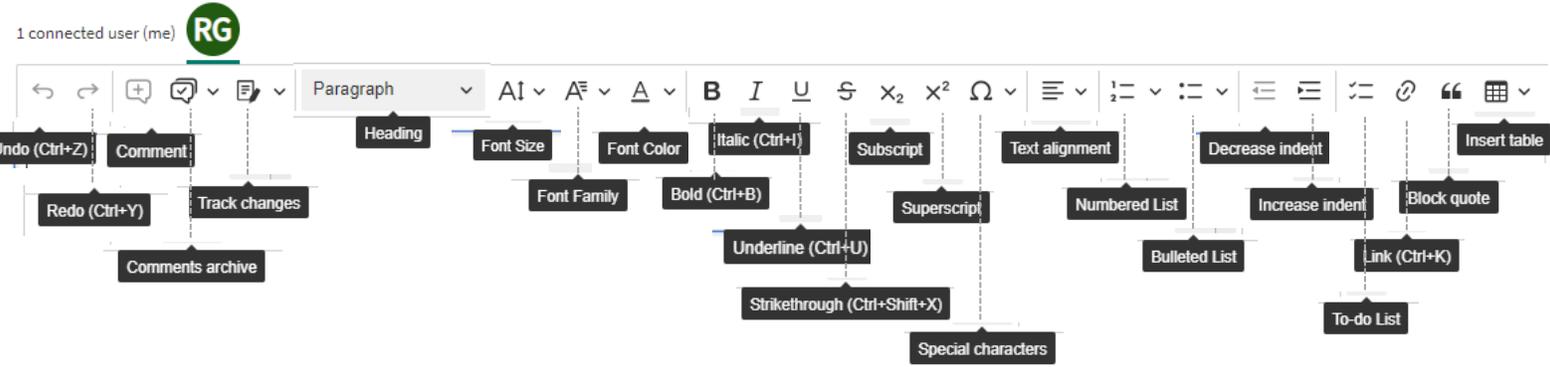
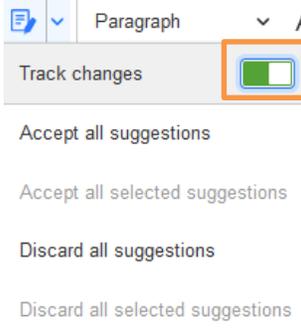
Step 4 : Use PES to Access Reviews and to Collaborate on the Panel Summary

- 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 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.



Panel Summary

[Return to Proposal List Page](#)

The scribe can click to disable track changes when typing

The scribe can click to accept all suggestions at once, accept only those selected, reject all suggestions, or reject only those selected

Additional Training Resources and 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, 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 rgov@nsf.gov. Non-technical questions about proposal reviews, panel summaries, etc. should be directed to the panel's managing Program Officer.