

Quick Start Instructions for Panelists Using the Proposal Evaluation System (PES) to Prepare and Submit Panel Reviews

Thank you for contributing to NSF's merit review process. We've made several enhancements to our processes in recent months. Our recent updates focus on safeguarding sensitive information, including proposals, while adopting the **Proposal Evaluation System (PES)**, our modernized proposal review system in Research.gov.

PES replaced the Interactive Panel System (IPS) module in FastLane and is used by reviewers to prepare and submit panelist reviews and/or to prepare for panel discussion. Some panels at NSF are set up to only prepare the panel summary with input from the panel discussion. Individual proposals in a panel may have reviews submitted by other individuals not participating in the panel. In either case, the panel summary is prepared collaboratively in PES. **This guide is for panelists preparing and submitting panelist reviews and participating in the panel discussion.**

Before You Can Access PES

NSF requires that all panelists complete the following one-time account management tasks before Research.gov will allow the panelist to access PES:

- ✓ Register for an NSF account in Research.gov
- ✓ Enroll in multifactor authentication (MFA) method to sign into Research.gov
- ✓ Complete a quick process to provide reviewer profile information

Panelists are also required to register for the panel meeting and record daily attendance in the Travel and Reimbursement System.

Please follow Steps 1 – 7 and Step 9 in the [How Panel Reviewers Access Assigned Proposals and Panels](#) guide to complete the above-referenced tasks. Step 8 is covered in more detail in this guide.

Help Resources

- Review the [PES video tutorial](#) and [frequently asked questions](#) on the Research.gov [About Proposal Evaluation System \(PES\)](#) page to help you navigate PES.
- Click the “About PES” link on the PES toolbar to navigate to the [About Proposal Evaluation System \(PES\)](#) page at any time to access PES help resources.
- Visit the [Meetings at NSF](#) page for information on participating in meetings at NSF.
- Refer to the [Account Management Reviewer](#) page for additional reviewer information.

Questions?

- For IT system-related questions including for reviewer profile, MFA enrollment, PES access, and meeting sign-in, 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 rgov@nsf.gov.
- Non-technical system (IT) questions about proposal reviews, panel summaries, etc. should be directed to the NSF managing Program Officer.

PES Instructions






PES Step 1: Access Proposals to Review

- Access assigned proposals to prepare and submit your reviews for the panel. By default, up to 50 proposals are displayed at a time on the Proposal List page. Alternatively, you can adjust the view to see '10' or 'All' proposals on the Proposal List page by clicking on the Items per page caret.
- **Click the Full Proposal PDF icon** in the Actions column on the Proposal List page to view the proposal in a new tab and download the full proposal PDF. You can also click the Proposal ID hyperlink.
- **Click the Edit Review icon** in the Actions column on the Proposal List page to navigate to the Prepare Review page
- Follow the instructions provided by the NSF managing Program Officer regarding submission of individual reviews.
- Use the Search bar and enter your name to filter the list proposals assigned to you to review (visible if Other Assigned Panelists column is enabled). Otherwise use the My Role column to view proposals by your role.



*Proposal List Page:
Expanded Proposal
Row View*






Full Proposal PDF icon

Edit Review icon

Proposal List						
Panel: P252864s 08/11/2025 to 08/15/2025						
Actions	Discussion Order	Proposal ID	Principal Investigator	My Role	Panel Summary Stage	Edits/Comments By
	1	2536903		Primary	Not Started	
	2	2536905		Secondary	Not Started	
	3	2542348		Secondary	Not Started	
	4	2543670		Panelist	Not Started	
	5	2451888		Primary	Not Started	

Proposal:			
Proposal ID	Principal Investigator	Co-Principal Investigator(s)	Organization
2451888			

Panelist Name			
Organization		Review Rating	Submitted Review
		E (Draft)	
		V	

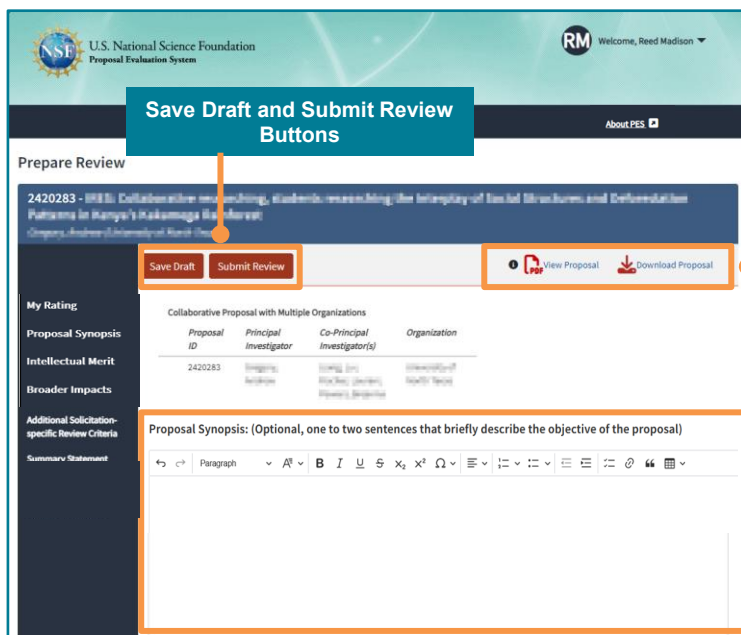
Other Reviewer Name			
Organization		Review Rating	Submitted Review
		G	
		G	
		G	
		E/V	
		E	

PES Step 2: Prepare Your Proposal Reviews in PES

- If the proposal is collaborative, an icon to the right of the proposal ID will appear. When expanding the row (see Step 4), the following lead and collaborative proposal information will display: Proposal Title, Proposal ID, Principal Investigator, co-Principal Investigator, and Organization.
- 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.
- The **Save Draft** button saves any reviews and/or ratings you have entered. Selecting the **Save Draft** button 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." After the panelist review is submitted once, the Save Draft button will no longer appear. If you edit your review after the first submission and do not click Submit, the review will show as a Draft on the Proposal List page. Please make sure to click Submit after making any changes so that the latest draft shows in the system and to other panel participants.

Quick Start Instructions for Panelists Using the Proposal Evaluation System (PES) to Prepare and Submit Panel Reviews

PES Review Form & Proposal Synopsis Section



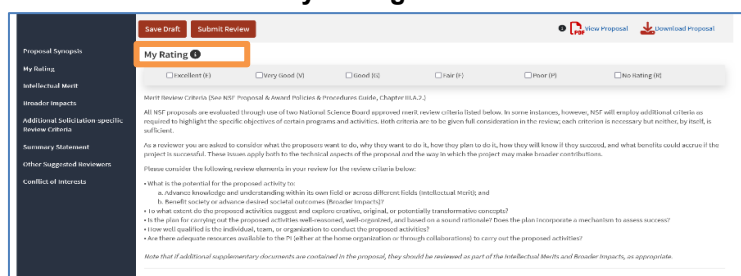
- Prepare a response for each of the following review form template in PES. Sections with an asterisk are required.

- My Rating
- Proposal Synopsis
- *Intellectual Merit
- *Broader Impacts
- Additional Solicitation-specific Review Criteria
- *Summary Statement

View Proposal and Download Proposal Icons

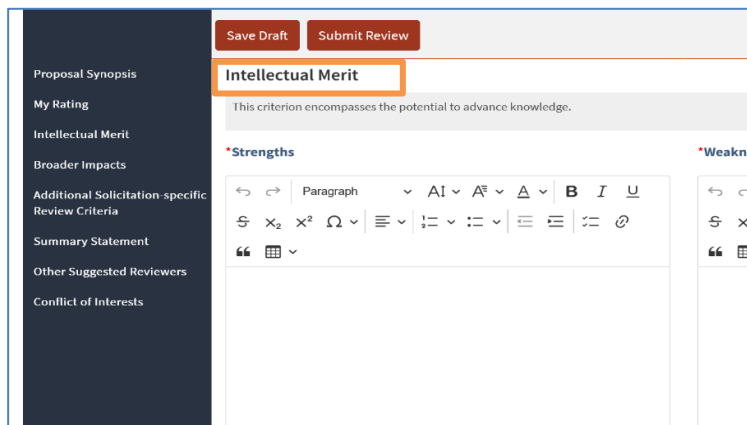
- View the definition of each rating by hovering over the information tip next to the My Rating header.
- Select a rating(s) in the **My Rating** section.
- Assigned reviewers can rate the proposal with one or up to two ratings depending on the rules set by the NSF managing Program Officer.
- You may also choose not to provide a rating. Select No Rating (R) to indicate that you are only submitting a review and not a rating.
- If no rating is selected, you will see a warning asking if you would like to submit a rating. **Reviews without ratings will not be visible to panelists or NSF staff in PES.**
- As you scroll down the page, the My Rating section will be floating to ensure you have access to it throughout composing your review.
- Enter a brief proposal summary in the **Proposal Synopsis** section or leave it blank.
- This is an optional text box by default.

My Rating Section

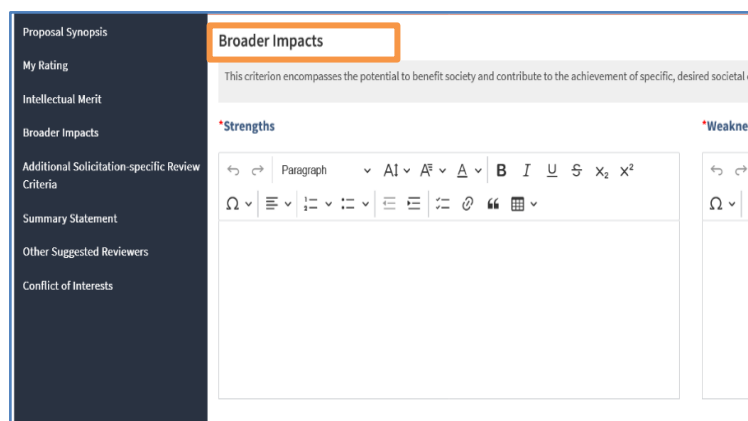


- **Intellectual Merit** and **Broader Impacts** are required sections.
- A red asterisk (*) indicates a required input field.

Intellectual Merit Section

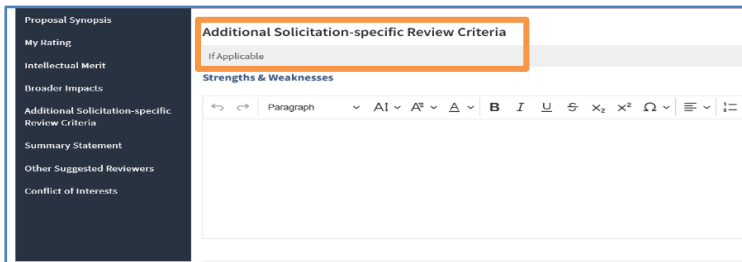


Broader Impacts Section



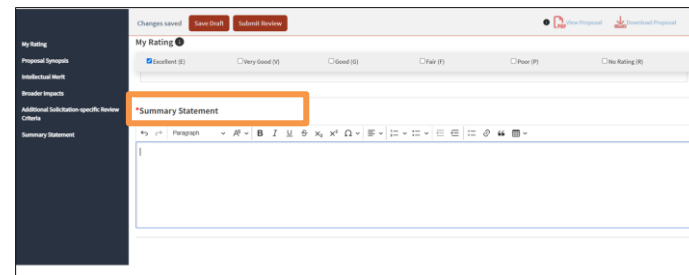
Quick Start Instructions for Panelists Using the Proposal Evaluation System (PES) to Prepare and Submit Panel Reviews

Additional Solicitation-specific Review Criteria Section



- The Additional Solicitation-specific Review Criteria section will only display for solicitations that include additional review criteria.
- This is a required section if it's applicable to the solicitation.

Summary Statement Section

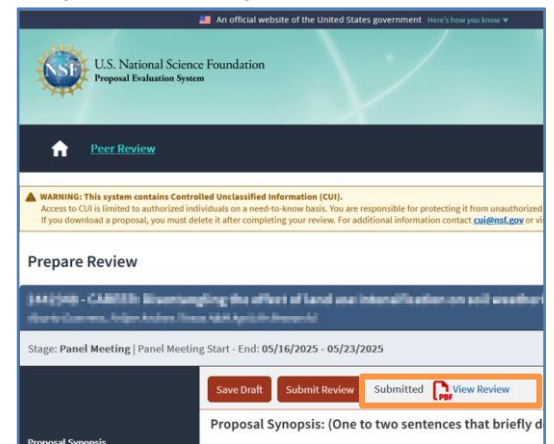


- Complete the Summary Statement section for each proposal.
- A red asterisk (*) indicates a required input field.

PES Step 3 : Submit Your Proposal Reviews in PES

- The **Submit Review** button uploads the review and/or rating to the system.
 - Proposal reviews will be available to view by other reviewers if the NSF managing Program Officer sets the meeting rule permissions to allow visibility.
 - If you click the **Submit Review** button 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 the **Submit Review** button to submit your proposal review to NSF.
- You will see an on-screen message indicating that your review was successfully submitted, and you can click the 'View Review' link to view a copy of the review after submitting.
- Click the **Return to Proposal List Page** button at the top right of the Prepare Review screen to go back to the Proposal List page in PES.
- Following review submission, an email will be sent to the primary Program Officer of the proposal with the contents of the review.

Prepare Review Page: Submitted Review

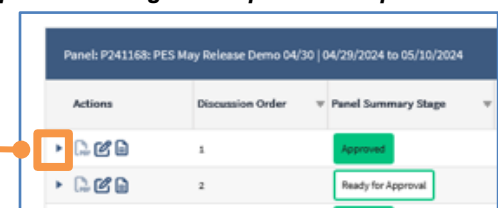


PES Step 4 : Access Reviews Prepared by Other Panelists and Reviewers

- Click the **Expand Proposal** caret in the Actions column on the Proposal List page to access additional fields in the proposal row and the proposal reviews prepared by other panelists and reviewers.

Expand Proposal
Caret

Proposal List Page: Unexpanded Proposal Row View



Quick Start Instructions for Panelists Using the Proposal Evaluation System (PES) to Prepare and Submit Panel Reviews

Proposal List Page: Expanded Proposal Row View

Proposal List

Panel: P252864 | 08/11/2025 to 08/15/2025

Actions	Discussion Order	Proposal ID	Principal Investigator	My Role	Panel Summary Stage	Edits/Comments By	Proposal Title
	1	2536903		Primary	Not Started		
	2	2536905		Secondary	Not Started		
	3	2542348		Secondary	Not Started		
	4	2543670		Panelist	Not Started		
	5	2451888		Primary	Not Started		

Collaborative Proposal Information (if applicable)

Proposal ID	Principal Investigator	Co-Principal Investigator(s)	Organization
2451888			

Conflict of Interest Information

Panelist Name	Organization
No records found	

Panelist Reviews

Panelist Name	Organization	Review Rating	Submitted Review
		E (Draft)	
		V	

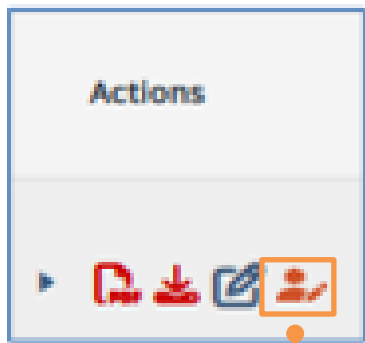
Reviews by Other Reviewers

Other Reviewer Name	Organization	Review Rating	Submitted Review
		G	
		G	
		G	
		E/V	
		E	

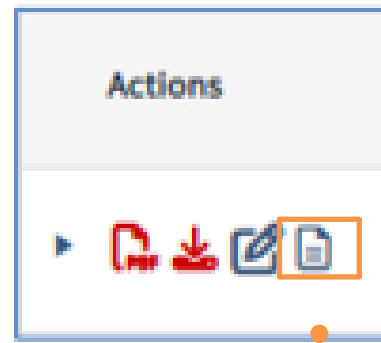
- Click the **Expand Proposal caret** in the Actions column on the Proposal List page to access additional fields in the proposal row and the proposal reviews prepared by other reviewers.
 - **Collaborative Proposal Information:** Proposal ID(s), Principal Investigator(s), and Organization(s) of the Collaborative Proposals, if applicable
 - **Panelist Reviews:** Panelist Name(s), Organization(s), Review Rating(s), and a button to View Review
 - **Reviews by Other Reviewers:** Other Reviewer Name(s), Organization(s), Review Rating(s), and a button to View Review
- If the proposal is collaborative, the following lead and collaborative proposal information will display Proposal Title, Proposal ID, Principal Investigator, co-Principal Investigator, and Organization.
- If a conflict of interest has been identified, the Conflict of Interest section will show the name and organization of panelists who have a conflict of interest with a particular proposal
- The lower portion of the Proposal List page displays the panelist reviews and reviews by other reviewers such as *ad hoc* reviewers.
- Click on the **View Panelist Review icon** to open a new tab to access the proposal review in read-only mode.
- If you do not see a review from a specific panelist, it could be that the panelist has not checked a review rating, has not clicked the "Submit Review" button to make their review visible to others, or that the meeting rules prevent panelists from viewing reviews of others during certain periods (e.g., prior to the panel).
- If a panelist has submitted a review but then makes any changes to it without submitting again, the previously submitted review will show as a draft in the expanded row. A panelist will need to submit their edited review for the latest version to be recorded as submitted in the system.

PES Step 5 : Use PES to Collaborate on the Panel Summary

- During the panel, panelists use PES to write, edit, comment on, and agree with the content of 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 “Prepare Panel Summary” text.
 - Panelists other than the Scribe will see the document icon and "Panel Summary" text.



Panel Summary icon for the Scribe



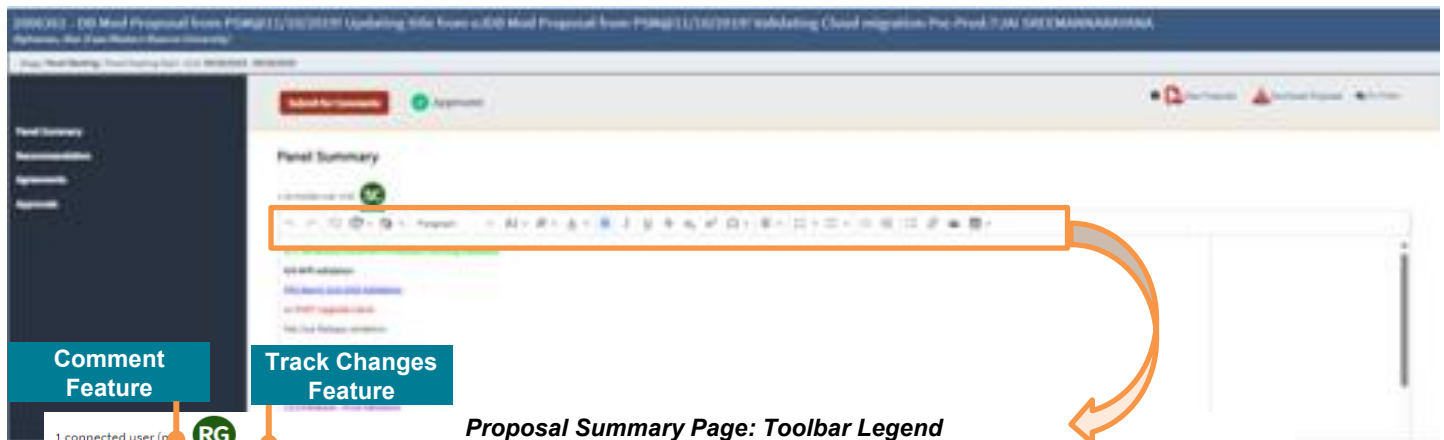
Panel Summary icon for other panelists

- When writing the panel summary, the Scribe types directly into the PES panel summary window. Changes are automatically saved when typing. **When the draft panel summary is ready for others to review and comment on, the Scribe clicks the “Submit for Comments” button.**
- To provide panel summary feedback, non-conflicted participants can:
 - Type edits directly in the panel summary which will display as track changes that the Scribe must accept or reject.
 - Add a comment to the panel summary by highlighting the panel summary text, clicking the "Comment" feature on the toolbar, and then clicking on the green check to submit. A listing of the individuals who have commented on the panel summary is available in the “Edits/Comments By” column on the Proposal List page.
- The Scribe makes edits to the panel summary (i.e., accepts or rejects all changes, replies to all comments and/or deletes all comments). **Once there is a clean copy, the agreements process can begin.**
- When everyone is done with comments and edits and there is a clean copy, they can signal to the Program Officer and Scribe during the panel that they are finished. 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 will 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). This produces a clean copy.

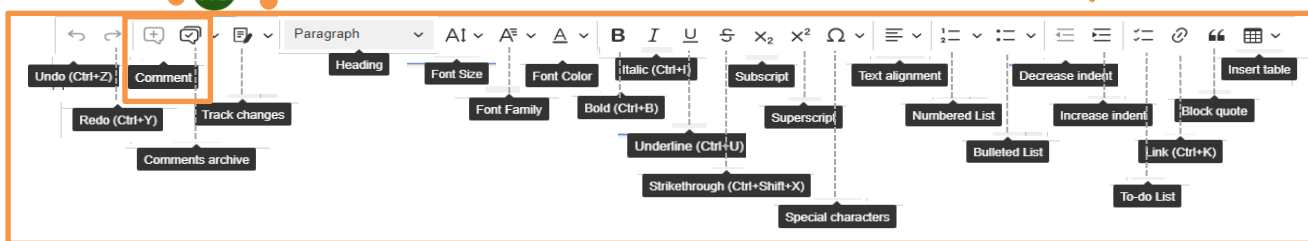
Quick Start Instructions for Panelists Using the Proposal Evaluation System (PES) to Prepare and Submit Panel Reviews

- The Program Officer will check that the Recommendation and the clean copy are good to proceed further, and the scribe will click '**Ready for Agreements**'.
- Assigned panelist(s) will review summaries '**Ready for Agreements**' and click "Agree with Panel Summary" button at the top to indicate their agreement that the Panel Summary reflects the panel discussion.
- 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.

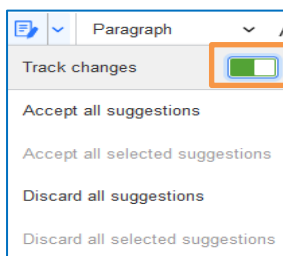
Proposal Summary Page View



Proposal Summary Page: Toolbar Legend



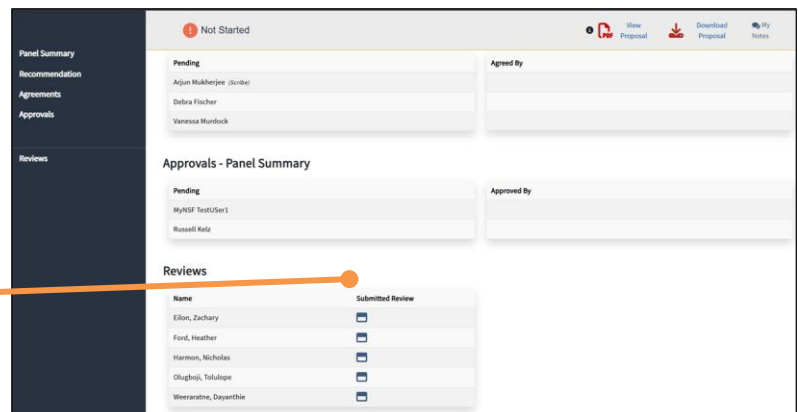
Track Changes Options



The Scribe can click to disable track changes when typing

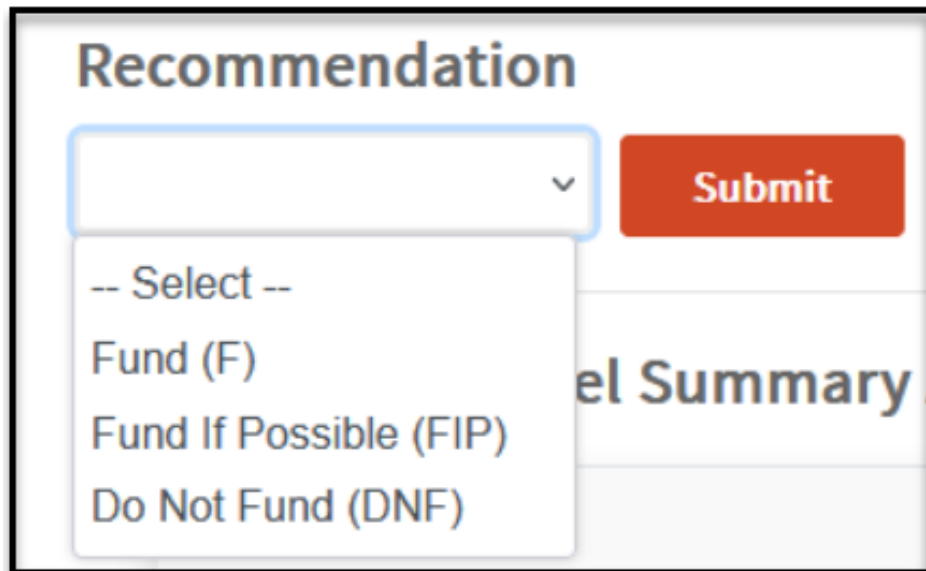
The Scribe can click to accept all suggestions at once, accept only those selected, reject all suggestions, or reject only those selected

Submitted Reviews of the proposal will display at the bottom of the Panel Summary Page



Appendix: Use PES to Submit a Recommendation

- Generally, the Panel Summary page display includes the recommendation scale to choose from.
- The Scribe or other authorized user based on the panel rules set by the managing NSF Program Officer(s) may click the Recommendation field to view/select a choice from the drop-down menu and then click the Submit button.
- The Submit button will update the recommendation but not the panel summary. The recommendation is independent of the panel summary and can be submitted at any time once the panel starts.
- Most panelists have read-only access to the Recommendation drop-down menu.
- Managing NSF Program Officer(s) may authorize a person other than the Scribe to provide recommendations for the panel. That person also will have access to the drop-down menu in the Recommendation field.
- Please note that proposals marked as "Not Discussed in Panel" do not need a panel summary.
- The PES team recommends that if a proposal is marked 'Not Discussed in Panel', the Scribe should remove the panel summary template text if applicable, submit the blank panel summary for comments, and all assigned panelists agree to the blank page, then the panel summary can be approved and reflected in the Proposal List page. The panel summary will remain blank with the recommendation.



The screenshot shows a web interface for submitting a recommendation. At the top, the word "Recommendation" is displayed in a large, bold, blue font. Below it is a dropdown menu with a blue border and a downward arrow on the right. The dropdown menu is open, showing four options: "-- Select --", "Fund (F)", "Fund If Possible (FIP)", and "Do Not Fund (DNF)". To the right of the dropdown menu is a red button with the word "Submit" in white. Below the dropdown menu, the text "el Summary" is partially visible, likely part of "Panel Summary".