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|  | **Respondent and Organization Profile** |
|  | Question |  Answers |
| 1. | In what capacity do you primarily interact with NSF? | **Select one of the following:** 1. Principal Investigator (PI) / Co-Principal Investigator (Co-PI)
2. Other Authorized User (OAU)
3. Sponsored Projects Office (SPO) staff
4. Authorized Organizational Representative (AOR)
5. Other (Please specify): ­­­­­­­­­­\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
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| 2. | Which of the following best describes your current organizational affiliation?  | **Select one of the following:** 1. Large research university
2. Primarily undergraduate institution
3. Community college
4. Minority serving institution
5. Other non-profit organization
6. For-profit organization
7. Other (Please specify): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
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| **Roles** |
|  | Question |  Answers |
| 3. | NSF currently offers several roles in FastLane and Research.gov that give users access to various functions to conduct business with NSF. This includes Principal Investigator (PI)/Co-Principal Investigator (Co-PI), Sponsored Projects Office (SPO), Authorized Organizational Representative (AOR), Other Authorized User (OAU), and financial management roles. Are there staff at your organization who require FastLane or Research.gov access to do their jobs, but who don’t have defined system roles granting them the appropriate level of access? | **Select one of the following:** a. No, the current selection of roles covers all staff at my organization who do business with NSFb. Yes (Please describe the roles of the individuals and the activities associated with those roles): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

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| **Proposal Submission Modernization (PSM)** |
|  | Question |  Answers |
| 4. | When the SPO returns a proposal to the PI using the "Return to PI" feature, what access, if any, does the SPO need to the proposal?  | Select one of the following: a. The SPO does not need to view the proposal until the PI forwards it back to the SPO (Current approach)b. The SPO needs read-only access to the proposalc. The SPO needs read/write access to the proposald. Other (Please specify): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| 5. | What access, if any, should the AOR have to a proposal immediately after it is created? | Select one of the following:a. AORs need read-only accessb. AORs need read/write accessc. The AOR’s access level should be configurable by the PId. The AOR should not have access until after the SPO forwards it (Current approach)e. Other (Please specify): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| 6. | As an SPO or AOR, do you need to have the ability to lock part or all of a proposal you are reviewing?  | Select one of the following:a. I need to lock the entire proposalb. I need to lock only the budget in the proposalc. I need to lock certain sections in the proposal (Please specify the sections) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_d. I do not need to lock my proposalse. Not applicable – I am not an SPO or AOR |
| 7. | If you have a dual role of PI/SPO or PI/AOR, how would you prefer to see your information organized?  | Select one of the following:a. Separate pages – one for PI documents, one for SPO or AOR documentsb. One landing page – separate sections for PI documents and SPO or AOR documentsc. One landing page – PI and SPO/AOR documents all combinedd. Not applicable – I do not anticipate having a dual rolee. Other (Please specify): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| 8. | As an SPO or AOR with read-only access to a proposal, would this mockup show all the information you need?Mockup - <http://d2dpv5.axshare.com/proposal_forms_-_view_only.html> **Password: gr@nts** | Select one of the following: a. Yes, the information is sufficientb. Unsurec. No, changes are needed (Please explain):\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| 9. | How should post-proposal submission actions (withdrawals, budget revisions, proposal file updates) be organized? | Select one of the following: a. All actions associated with the relevant submitted documentMockup –<http://d2dpv5.axshare.com/submitted_documents.html> **Password: gr@nts** b. Separate sections for budget revisions and proposal file updates (Current approach)c. Other (Please specify): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| 10. | In addition to the Principal Investigator (PI), who needs to be able to **initiate a proposal file update** on a previously submitted proposal? | Select all that apply: a. Co-Principal Investigator (Co-PI)b. Other Authorized User (OAU)c. Sponsored Project Office (SPO)d. Authorized Organizational Representative (AOR)e. None of the above |
| 11. | In addition to the Principal Investigator (PI), who needs to be able to **initiate a budget revision** for a previously submitted proposal? | Select all that apply:a. Co-Principal Investigator (Co-PI)b. Other Authorized User (OAU)c. Sponsored Project Office (SPO)d. Authorized Organizational Representative (AOR)e. None of the above |
| 12. | If you work for multiple organizations, do you need a consolidated view of proposal information for all your organizations? | Select one of the following: a. No, I would rather view information for each organization separatelyb. Yes, I would like to see all information combined in one tablec. Yes, I would like to see the information on the same page but in different viewsd. Not applicable - I work for only one organization |
| 13. | How important is it to know who last modified each proposal section on the main proposal screen?  | Select one of the following: a. Very Importantb. Moderately Importantc. Not importantd. Not sure |

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| **Duplicative Accounts** |
|  | Question |  Answers |
| 14. | Are you aware of any individuals at your organization who have more than one NSF account they use to log in to FastLane and Research.gov? | **Select one of the following:** a. Nob. Yes - **Conditional question:** You indicated that you are aware of individuals at your organization that have more than one NSF account. Please tell us the reason(s) they created more than one account: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |

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|  | **General Feedback / Satisfaction** |
| \*Note: Questions 15 and 16 will be included in the survey launched to NSF ERA Forum participants only. These two questions will not be used for the FDP session.  |
|  | Question |  Answers |
| 15. | Were you satisfied with the second NSF Electronic Research Administration Forum held today? | **Select one of the following:** 1. Satisfied
2. Neutral
3. Not Satisfied - **Conditional question:** You indicated “Not Satisfied” with the second NSF ERA Forum. Could you please share any suggestions for improvement? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
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| 16. | Please share any topics of interest you would like to focus on at future NSF Forums. | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |