



Graduate Research Fellowship Program
Coordinating Official User Guide

November 15, 2008

Version 1.18

Document Change Record

Version Number	Date	Description
1.5	February 23, 2005	Updated the following Figures: 2, 4, 9, 10, 13, 16, 17, 19, 23, 26, 27,28 and 37. Updated 2.1.1 and 5.1 user instructions.
1.6	October 22, 2005	Updated sections 2.1.1, 2.1.2,2.1.3.
1.7	December 3, 2005	Updated sections 3.1, 5.1, 5.2, 6, 7, 8.1, 8.2, and 9.
1.8	January 21, 2006	Updated 2.1.2.
1.9	May 20, 2006	Updated sections 2.2, 3, 4, 5, 6, 7, 8, 8.1, 8.2, and 9.
1.10	August 5, 2006	Updated sections 8, 8.1, and 8.2
1.11	March 3, 2007	Reorganized sections under CO and GRFP FO tasks. Updated Sections: 2.1.3, 2.2, 3, 3.1, 3.4, 3.8, 3.9 Added Sections: 4, 4.1, 4.2., 4.2.1, 4.2.2
1.12	June 9, 2007	Updated Sections: 3.1, 3.8, 4.1, 4.2, 4.2.1, 4.2.2
1.13	October 20, 2007	Updated Figures: 3, 6
1.14	December 15, 2007	Updated Section 3.3
1.15	May 19, 2008	Reorganized previously FO tasks under CO tasks. Updated Sections: 3.1, 3.2.1, 3.6, 3.7, 3.8
1.16	July 31, 2008	Updated Sections: 3.7 and 3.8
1.17	September 12, 2008	Updated Figure 70
1.18	November 15, 2008	Updated Sections 3.7.5 and 3.8.1

TABLE OF CONTENTS

1	CONVENTIONS USED IN THIS GUIDE	1
2	GETTING ACCESS	2
2.1	LOGGING IN	2
2.1.1	<i>Retrieving a Forgotten Password</i>	3
2.1.2	<i>Changing Your Password</i>	4
2.1.3	<i>Mandatory Password Change</i>	5
2.1.4	<i>Logging Out</i>	5
2.2	UNDERSTANDING YOUR PROFILE	6
3	COORDINATING OFFICIAL TASKS	7
3.1	UNDERSTANDING YOUR TASK LIST	7
3.2	MANAGING TENURE REQUESTS	10
3.2.1	<i>Approving Tenure Change Requests</i>	10
3.2.2	<i>Disapproving Tenure Requests</i>	13
3.3	MANAGING TRAVEL ALLOWANCE REQUESTS	16
3.3.1	<i>Approving Travel Allowance Requests</i>	16
3.3.2	<i>Disapproving Travel Allowance Requests</i>	19
3.4	MANAGING ACTIVITY REPORT COMPLETION	22
3.5	VERIFYING SATISFACTORY PROGRESS/RESERVE STATUS	23
3.5.1	<i>Verifying Satisfactory Progress</i>	24
3.5.2	<i>Verifying Unsatisfactory Progress</i>	26
3.5.3	<i>Submitting Reserve Verifications</i>	28
3.6	VIEWING THE FELLOWSHIP YEAR FELLOWS REPORT	30
3.7	MANAGING BUDGET REQUEST SUBMISSION ACTIVITIES	32
3.7.1	<i>Submitting a Grants Roster Report and Verifying the Financial Summary</i>	33
3.7.2	<i>Viewing Grants Roster Reports and Financial Summaries</i>	39
3.7.3	<i>Viewing and Understanding Budget Request PDFs</i>	40
3.7.4	<i>Understanding Report Versions</i>	41
3.7.5	<i>Understanding Report Statuses</i>	41
3.8	MANAGING PROGRAM EXPENSE REPORTS	42
3.8.1	<i>Submitting a Program Expense Report</i>	43
3.8.2	<i>Viewing Program Expense Reports</i>	47
3.9	VIEWING FELLOW INFORMATION	50

1 CONVENTIONS USED IN THIS GUIDE

The names of on-screen features appear in bold.

EXAMPLE: Click on the **Search** tab.

Uniform Resource Locators (URLs) are underlined and are in blue font.

EXAMPLE: Type the following address in your browser's address bar:
<http://fastlane.nsf.gov>.

Many software features and some business processes are explained in a reference table format. An on-screen term appears in the left column and a description of the term appears in the right column.

EXAMPLE:

Feature	Description
Fellow ID	The Fellow ID is the number assigned to you when you become a fellow.

The following three conventions serve as both examples and descriptions:

WARNING: Warnings provide information designed to prevent critical errors from occurring. If you see a warning, stop and read it before continuing.

NOTE: While Notes do not describe critical information, we suggest that you stop and read them, too. The information in a note can prevent minor errors from occurring. Other notes simply provide information designed to deepen your understanding of a software feature.

TIP: Tips provide information designed to increase your productivity.

2 GETTING ACCESS

2.1 Logging In

1. Access the GRFP application by typing the following address into your browser address bar: <http://www.fastlane.nsf.gov/grfp>



Figure 1: GRFP Officials Log In

2. Type your last name in the Last Name field.
3. Type your SSN (or pseudo SSN) in the SSN field.
4. Type your password in the Password field.
5. Click the Login button.

The GRFP home page appears with your Task List and current Profile.

2.1.1 Retrieving a Forgotten Password

1. Click on the Forgot Password link found under the Login button.

The retrieve password screen is displayed.



NSF

FastLane

Home News Comments nsf.gov

More Information

FastLane Site Map

Password Reset

Social Security Number: [Privacy Act](#)

Your Last Name:

E-Mail:

Note: Self-reset of passwords by Financial Administrators and Financial Users is not allowed due to tighter security requirement. If you are a Financial Administrator or a Financial User, please contact appropriate person in your Sponsored Research Office who has password reset authority to reset your password for you.

Figure 2: Forgot Password Screen

2. Type your SSN in the SSN field.
3. Type Your Last Name into Your Last Name field.
4. Type your email address in the Email Address field.
5. Click on the Submit button.

A confirmation screen will be displayed and the system will email you a temporary password to the email address you provided.

2.1.2 Changing Your Password

1. Select the Change Password link from the upper-right navigation bar.

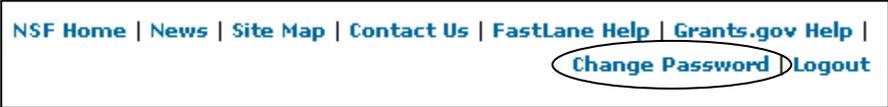


Figure 3: Change Password Link

The Rules of Behavior page will be displayed. This page is used to ensure that you understand the rules of behavior involved with interacting with a government computer system. You are required to read and accept the rules of behavior before continuing through the change password.

2. Click the “I have read and accept the Rules of Behavior”, and click the Accept button (pictured below).

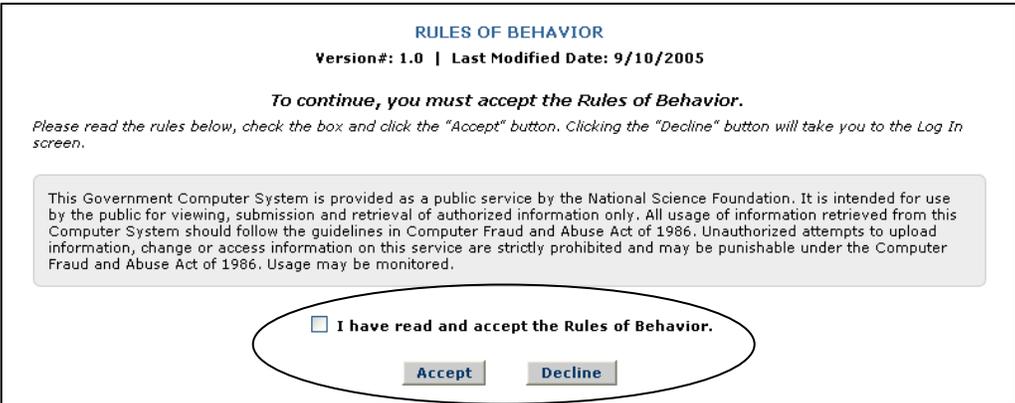


Figure 4: Rule of Behavior

The Change Password screen is displayed.

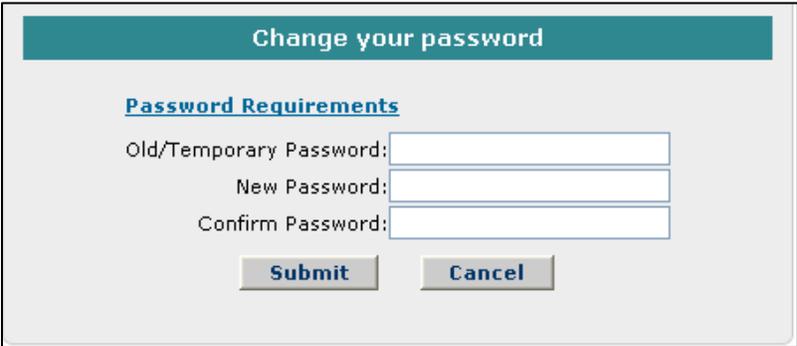


Figure 5: Change Password Screen

3. Enter your Old/Temporary Password, your New Password, and Confirm your New Password.
4. Click the Submit button

A confirmation screen is displayed indicating you have successfully changed your password. You may select the CO Home Page link to return to your task list.

NOTE: Password length must be between 6 and 20 characters. The password must contain at least one alphabetic and one numeric character. Passwords are not case sensitive. You cannot reuse the last three passwords you have used. Passwords expire every 365 days. Passwords for users with Financial Functions permissions expire.

2.1.3 Mandatory Password Change

A Mandatory Password Change is required under any of the following conditions:

- a. You have not voluntarily or optionally changed your password prior to its expiration date every 180 days.
- b. Your password has expired (every 180 days) or will expire within in 10 days.
- c. You forgot your password and FastLane reset it.
- d. You have already Self-Registered in GRFP.

2.1.4 Logging Out

Once you have logged into the GRFP application, a Logout link is available in the upper-right navigation bar.

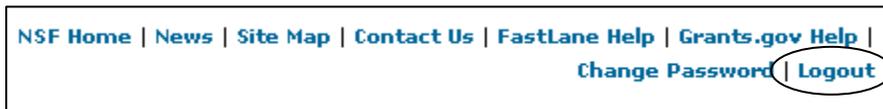


Figure 6: Logout Link

To exit the application at any time, click on the Logout link. The web browser returns to the GRFP login page.

2.2 Understanding Your Profile

Your profile area details your current user profile information. Contact your SRO to make a request for changes to your profile. The list below describes each feature in your profile.



Figure 7: My Profile Screen

The list of all fields available in your profile and a description of each is described below:

Feature	Description
Organization	The Organization field indicates the university/college for which you are designated as a Coordinating Official or GRFP Financial Official. This field is not editable and may not be changed through the application.
Name	The Name field includes your first name, middle initial, last name, suffix, and maiden name. Your first and last names are required fields.
Email	The Email field is your primary email address and is used to send all system-generated and GRFP related emails. Please ensure your email address is kept up-to-date so that all electronic correspondence reaches you in a timely manner.
Phone	The Phone field is your primary phone number and will be used by GRFP for any telephone correspondence. Please ensure this phone number is kept up-to-date so that NSF may contact you, if needed.

3 COORDINATING OFFICIAL TASKS

Coordinating Officials and their alternates manage all fellowship related activities with the exception of the Program Expense Report which is adjusted and submitted by GRFP Financial Officials. Once you have logged in as a Coordinating Official, you will see links to all the tasks administered by a Coordinating Official through the FastLane system in your Task Lists.

3.1 Understanding Your Task List

Your task list area has two different sections. The “Task List” contains tasks that are pending your approval or that are currently due. These actions include: verify satisfactory progress/reserve status, approving tenure requests, approving travel requests, viewing a list of activities reports not yet submitted, adjusting/submitted a Program Expense Report, and budget request submission activities for the upcoming year.

The “Optional Task List” contains features that you may use and access at anytime. This functionality includes: viewing your organization’s fellows for the current fellowship year, submitting Program Expense Reports for prior years, viewing grants roster reports, viewing Program Expense Reports, and viewing fellow information.

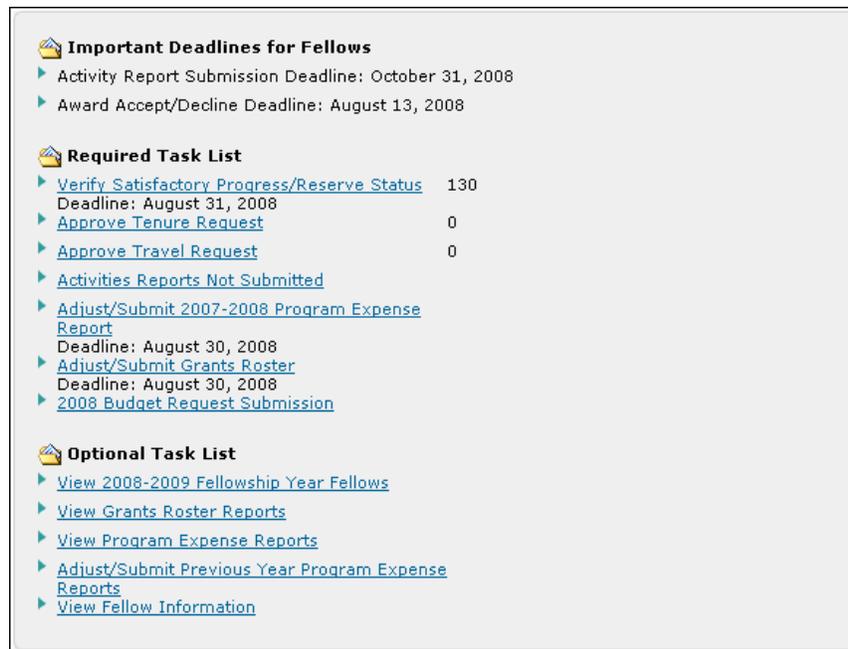


Figure 8: CO Task List

The list of all possible tasks that may appear in your task list and a description of each is provided below:

Feature	Description
Verify Satisfactory Progress/Reserve Status	The Verify Satisfactory Progress/Reserve Status task needs to be completed each year for fellows at your organization who are on tenure or on reserve. For fellows on tenure, this task allows you to submit a satisfactory or unsatisfactory rating for each fellow that is eligible to declare for the coming year. For fellows on reserve, you must submit a reserve verification. This task is available approximately January through May of each year.
Approve Tenure Requests	The Approve Tenure Requests task must be completed each time a fellow has submitted a tenure, organization, or field of study change request that requires your approval. The number of requests pending your approval is displayed next to the task.
Approve Travel Requests	The Approve Travel Requests task must be completed each time a fellow has submitted a travel request that requires your approval. The number of requests pending your approval is displayed next to the task.
Activities Reports Not Submitted	The Activities Reports Not Submitted provides a report of all fellow activities reports that have not yet been submitted. You may use this task to keep track of fellow progress on completing Activities Reports.
Adjust/Submit current year Program Expense Report	The Adjust/Submit Program Expense Report task must be completed once a year for new Program Expense Reports. This task allows you to view, adjust, and validate the yearly costs for the fellows at your organization.
Adjust/Submit Prior Year Program Expense Reports	Program Expense Reports for the four fiscal years prior the most recent fiscal year can be adjusted and resubmitted at any point. This task allows you to view, adjust, and validate the yearly costs for the fellows at your organization.

Feature	Description
Adjust/Submit Grants Roster Report	<p>Grants Roster Reports must be completed each year for the upcoming fellowship year. This task allows you to view, adjust, and validate the projected costs for all fellows that will be at your organization in the upcoming year.</p> <p>As part of Grants Roster submission, a Financial Summary for your organization must be verified. The Financial Summary provides details of your organization's current award as well as expenses against the award and projected costs for the upcoming year. These figures are used to calculate a budget request estimate for the upcoming year.</p>
Budget Request Submission Activities	<p>Budget Request Submission Activities are activities which must be completed annually to produce a budget request for funding for the upcoming fellowship year. Includes activities such as Adjust/Submit Grants Roster Report.</p>
View Fellowship Year Fellows Report	<p>The View Fellowship Year Fellows Report task is available at all times. This task allows you to view a report of all fellows at your organization for the current fellowship year.</p>
View Grants Roster Report	<p>The View Grants Roster Report task is available at all times. This task allows you to view the current Grants Roster Report as well as previous Grants Roster Reports for your organization beginning with the 2008-2009 Fellowship Year.</p>
View Program Expense Reports	<p>The View Program Expense Reports task is available at all times. This task allows you to view all versions of the Program Expense Reports that exist for your organization. You may use this task to keep track of the details and status of Program Expense Reports that are modified and submitted by GRFP Financial Officials.</p>
View Fellow Information	<p>The View Fellow Information task is available at all times. This task allows you to view information on fellows associated with your organization. You may use this feature to view the fellow's tenure records, previous tenure change requests, and previous travel requests.</p>

3.2 Managing Tenure Requests

Fellows may submit tenure change requests for their current year's tenure at any time during the year. Fellows may also request tenure changes while they are declaring their tenure plans for the next year. A tenure request includes changes to the fellow's organization, field of study, or tenure status. When a fellow at your organization submits a tenure request, you will be required to approve or disapprove the request. Once the fellow has submitted the request, you will be notified via email that a request has been submitted for your approval. After receiving the email notification, you may log into the GRFP application to review and take action on the request. Your task list will display the number of tenure requests pending your approval next to the Approve Tenure Request link.

The screenshot shows a web interface with three main sections: 'Important Deadlines for Fellows', 'Required Task List', and 'Optional Task List'. The 'Required Task List' section contains a table of tasks with their respective counts. The 'Approve Tenure Request' link and its count '0' are circled in red.

Task Name	Count
Verify Satisfactory Progress/Reserve Status	130
Approve Tenure Request	0
Approve Travel Request	0
Activities Reports Not Submitted	
Adjust/Submit 2007-2008 Program Expense Report	
Adjust/Submit Grants Roster	
2008 Budget Request Submission	

Figure 9: Approve Tenure Requests Link

3.2.1 Approving Tenure Change Requests

When you select to approve tenure change requests, a list of all pending requests is displayed. Once you select a request to approve, the details of the request will be displayed and you will have the option to approve or disapprove the request.

To Approve a Tenure Change Request:

1. Select Approve Tenure Request link from your Task List.

The list of all pending requests is displayed, including the fellow's name, fellow id, the tenure year the request is for, and the request date. The list of requests can be sorted by clicking any of the column headings in order to sort the list by that column.

If You Wish to Search for a Specific Request:

- 1. Enter the fellow ID or the last name of the fellow whose request you wish to search for in the Search box area.

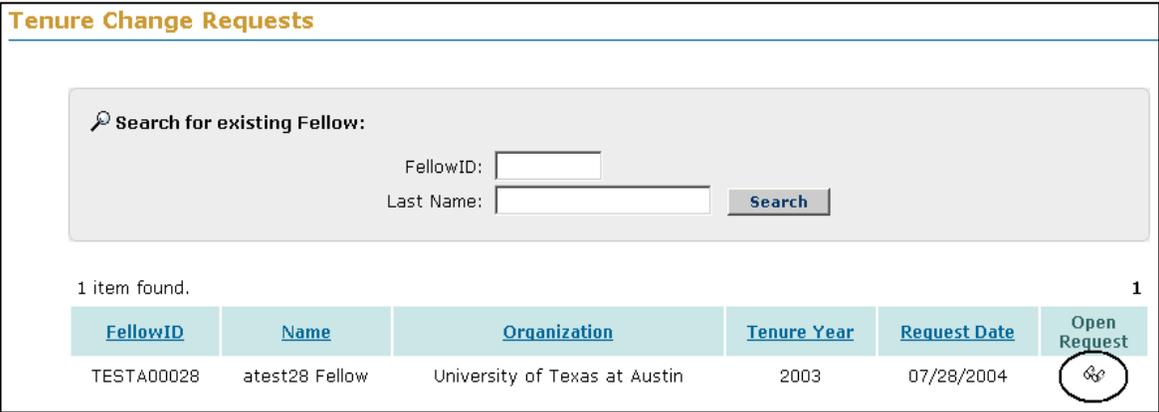


A search form titled "Search for existing Fellow:" with a magnifying glass icon. It contains two input fields: "FellowID:" and "Last Name:". To the right of the "Last Name:" field is a "Search" button.

Figure 10: Tenure Requests Search Box

- 2. Click the Search button.

The matching results are displayed in the requests list.



A screenshot of the "Tenure Change Requests" page. At the top, there is a search box identical to Figure 10. Below the search box, it says "1 item found." followed by a table with 6 columns: FellowID, Name, Organization, Tenure Year, Request Date, and Open Request. The first row of data is: TESTA00028, atest28 Fellow, University of Texas at Austin, 2003, 07/28/2004. The "Open Request" column for this row contains an icon of a document with a checkmark, which is circled in red.

FellowID	Name	Organization	Tenure Year	Request Date	Open Request
TESTA00028	atest28 Fellow	University of Texas at Austin	2003	07/28/2004	

Figure 11: Pending Tenure Requests List and Open Request Icon

- 3. Open a request by clicking on the open request icon.

The request details are displayed. The information that is displayed in the request details will vary depending on the type of tenure change request the fellow has submitted. In all cases, the old organization, field of study, or tenure status will be displayed as well as the requested changes. For organization and tenure status changes, an effective date and tenure year start date will also be displayed.

Tenure Change Requests

Current Fellow Status

Fellow ID: TESTJ00011 Tenure Months Used: 12 Organization: University of Florida	Name: Fellow jtest11 Reserve Months Used: 0 Field of Study: Engineering - Computer Engineering	Fellow Status: Active Forfeit Months Used: 0 Travel Allowance Used: \$0.00	Tenure Status: On Tenure Year Awarded: 2004
---	---	---	--

Request Summary

New Field Of Study: Geosciences - Geophysics
Effective Date: 09/01/2005

Reason for Request

test test test

Figure 12: Example Tenure Status Change Request

4. Click the Approve button.

If you are approving an organization change or a tenure status change, an additional screen is displayed. This screen asks you to input the amount of stipend and cost-of-education allowance you will be paying the fellow prior to their transfer. If you are approving a field of study change, this screen will not be displayed.

Request Summary

Tenure Year: 2004
New Field Of Study: Engineering - Computer Engineering
New Tenure Status: On Reserve
Previous Tenure Status: On Tenure
Effective Date: 09/01/2004

Reason for Request

This is not a change; computer engineering has always been my field. I am spending next year working in industry, with the hopes of gaining some inspiration for future graduate research. I have not worked in industry yet, and I think the experience may help me find a PhD topic.

Stipend and Cost of Education Questions

When a Fellow requests to transfer institutions or go on deferral at the beginning of a tenure year and therefore will not use any months of tenure at your institution, then you should enter \$0 for the stipend and COE amounts. However, if the Fellow makes a request to transfer institutions or go on deferral after the start of the tenure year, then you should enter in the stipend and COE amounts you plan to pay the fellow by prorating these amounts based on the months of tenure they will use at your institution.

How much of the fellow's stipend do you plan to pay for the tenure year in which this change occurs?

How much of the fellow's cost-of-education allowance do you plan to pay for the tenure year in which this change occurs?

Figure 13: Stipend and COE Questions

5. Enter the stipend and COE amounts.

WARNING: Enter the stipend and COE amounts you plan to pay the fellow for the tenure year the change has been requested for. If a fellow is requesting a change to their organization or going on deferral for the next tenure year, you should enter \$0 for the stipend and COE amounts.

6. Click the Submit button.
7. A confirmation screen is displayed indicating you have successfully approved the tenure request. You may select the CO Home Page link to return to your home page and task list. Once you have approved the tenure request, it will be forwarded to NSF for review and approval and the request will no longer appear in your pending tenure requests list. An email will also be sent to the fellow indicating that their CO has approved the request and that the request has been forwarded to NSF for approval.

NOTE: Mid-Year requests involving an Organization change require approval by Coordinating Officials at both Organizations prior to NSF approval. Start of Year requests involving an Organization change only require the approval of the Proposed Organization prior to NSF approval.

NOTE: The fellow's tenure details will reflect the last approved status, whether the request is to occur immediately or occur in the future. If it is a tenure change request that has been approved to occur immediately, it will be reflected as such in the Current Fellow Status. If it is a tenure change request that has been approved to happen in the future (ex. The fellow is currently on tenure as of November but as of January they will be on reserve), the tenure details will reflect that they are on reserve (the last approved status), while the Current Fellow Status will reflect that they are on tenure (current status).

3.2.2 Disapproving Tenure Requests

In some cases, it may be necessary to disapprove a change a fellow has requested. When you disapprove a fellow's change request, an email is sent to the fellow with the disapproval notification and reason.

To Disapprove a Tenure Change Request:

1. Select the Approve Tenure Request link from your Task List.

The list of all pending requests is displayed, including the fellow’s name, fellow id, the tenure year the request is for, and the request date. The list of requests can be sorted by clicking any of the column headings in order to sort the list by that column.

Tenure Change Requests

Search for existing Fellow:

FellowID:

Last Name:

1 item found. 1

FellowID	Name	Organization	Tenure Year	Request Date	Open Request
TESTA00028	atest28 Fellow	University of Texas at Austin	2003	07/28/2004	

Figure 14: List of Pending Tenure Change Requests

- 2. Select a request to view by clicking the open request icon.

The request details are displayed. The information that is displayed in the request details will vary depending on the type of tenure change request the fellow has submitted. In all cases, the old organization, field of study, or tenure status will be displayed as well as the requested changes. For organization and tenure status changes, an effective date and tenure year start date will also be displayed.

- 3. Click the Disapprove button.

The Disapproval Reason screen is displayed with a field available for you to enter the reason you are disapproving the change request. The reason you enter in this screen will be sent in a disapproval notification email that is sent to the fellow.

Request Summary

New Tenure Status: On Reserve
Previous Tenure Status: On Tenure
Effective Date: 11/20/2003

Reason for Request

This is an example of the tenure change request reason that a fellow may enter.

Disapproval Reason

Figure 15: Tenure Change Request Disapproval Reason Screen

4. Enter a disapproval reason.

NOTE: The disapproval reason must be less than 255 characters.

5. Click the Submit button.

A confirmation screen is displayed indicating you have successfully disapproved the tenure request. You may select the CO Home Page link to return to your home page and task list. The request will no longer appear in your pending requests list. Once you have disapproved the tenure request, an email will be sent to the fellow informing them that their tenure change request has been disapproved. For mid-year change requests involving an Organization change, an email will also be sent to the Coordinating Official from the other Organization.

3.3 Managing Travel Allowance Requests

Fellows may request one-time travel allowances at any time when their status is either on tenure or on reserve, regardless of the number of tenure months used. When a fellow at your organization submits a travel allowance request, you will be required to approve or disapprove the request. Once the fellow has submitted the request, you will be notified via email that a request has been submitted for your approval. After receiving the email notification, you may log into the GRFP application to review and take action on the request. Your task list will display the number of travel requests pending your approval next to the Approve Travel Request link.

The screenshot shows a web interface with three main sections: 'Important Deadlines for Fellows', 'Required Task List', and 'Optional Task List'. The 'Required Task List' section contains a table of tasks with their respective counts. The 'Approve Travel Request' link is circled in red.

Task	Count
Verify Satisfactory Progress/Reserve Status	130
Deadline: August 31, 2008	
Approve Tenure Request	0
Approve Travel Request	0
Activities Reports Not Submitted	
Adjust/Submit 2007-2008 Program Expense Report	
Deadline: August 30, 2008	
Adjust/Submit Grants Roster	
Deadline: August 30, 2008	
2008 Budget Request Submission	

Figure 16: Approve Travel Requests Link

TIP: For an explanation of travel allowances and rules regarding the travel allowance please refer to the GRFP Information Booklet.

3.3.1 Approving Travel Allowance Requests

When you select to approve travel allowance requests, a list of all pending requests is displayed. Once you select a request to approve, the details of the request will be displayed and you will have the option to approve or disapprove the request.

To Approve a Travel Allowance Request:

1. Select the Approve Travel Request link from your task list.

The list of all pending requests is displayed, including the fellow's name, fellow id, the tenure year the request is for, and the request date. The list of requests can be sorted by clicking any of the column headings in order to sort the list by that column.

If You Wish to Search for a Specific Request:

- 1. Enter the fellow ID or the last name of the fellow whose request you wish to search for.

Travel Allowance Requests

Search for existing Fellow:

FellowID:

Last Name:

Figure 17: Travel Requests Search

- 2. Click the Search button.

The matching results are displayed in the requests list.

Travel Allowance Requests

Search for existing Fellow:

FellowID:

Last Name:

1 item found. 1

<u>FellowID</u>	<u>Name</u>	<u>Organization</u>	<u>Tenure Year</u>	<u>Request Date</u>	<u>Open Request</u>
TESTJ00020	jtest20 Fellow	University of Florida	2004	02/24/2005	

Figure 18: Matching Search Results List

3. Open a request by clicking on the open request icon.

The travel request details are displayed. The request details include the fellow’s departure and return information as well as a description of their plans while on travel.

The screenshot displays the 'Travel Allowance Requests' interface. At the top, there is a section titled 'Current Fellow Status' which is divided into four columns of information:

- Fellow ID:** TESTA00023
- Tenure Months Used:** 24
- Organization:** University of Texas at Austin
- Name:** Fellow atest23
- Reserve Months Used:** 24
- Field of Study:** Engineering - Computer Engineering
- Fellow Status:** Active
- Forfeit Months Used:** 0
- Travel Allowance Used:** \$0.00
- Tenure Status:** On Reserve
- Year Awarded:** 2001

Below this is the 'Request Summary' section, which is split into two columns:

- Departure Information:**
 - Date: 10/31/2005
 - City: Richmond
 - State: VA
 - Country: US
- Destination Information:**
 - Return Date To US: 02/22/2006
 - City: Paris
 - Country: FR

The 'Reason for Request' section contains the text: 'Travel plans would be entered here.'

At the bottom of the form, there are three buttons: 'Approve', 'Disapprove', and 'Cancel'.

Figure 19: Travel Request Details

4. Click the Approve button.

A confirmation screen is displayed indicating you have successfully approved the travel request. You may select the CO Home Page link to return to your home page and task list. Once you have approved the travel request, it will be forwarded to NSF for review and approval and the request will no longer appear in your pending travel requests list. An email will also be sent to the fellow indicating that their CO has approved the request and that the request has been forwarded to NSF for approval.

3.3.2 Disapproving Travel Allowance Requests

In some cases, it may be necessary to disapprove a travel request a fellow has submitted. When you disapprove a fellow's travel request, an email is sent to the fellow with the disapproval notification and reason.

To Disapprove a Travel Request:

- 1. Select the Approve Travel Request link from your task list.

The list of all pending requests is displayed, including the fellow's name, fellow id, the tenure year the request is for, and the request date. The list of requests can be sorted by clicking any of the column headings in order to sort the list by that column.

The screenshot shows a web interface titled "Travel Allowance Requests". At the top, there is a search bar with the text "Search for existing Fellow:". Below this, there are two input fields: "FellowID:" and "Last Name:", followed by a "Search" button. Below the search bar, it says "1 item found." and a small number "1" in the top right corner. Below this is a table with the following data:

FellowID	Name	Organization	Tenure Year	Request Date	Open Request
TESTJ00020	jtest20 Fellow	University of Florida	2004	02/24/2005	&g

Figure 20: List of Pending Travel Requests

2. Open a request by clicking the open request icon.

The travel request details are displayed. The request details include the fellow's departure and return information as well as a description of their plans while on travel.

Travel Allowance Requests

Current Fellow Status

Fellow ID: TESTA00023 Tenure Months Used: 24 Organization: University of Texas at Austin	Name: Fellow atest23 Reserve Months Used: 24 Field of Study: Engineering - Computer Engineering	Fellow Status: Active Forfeit Months Used: 0 Travel Allowance Used: \$0.00	Tenure Status: On Reserve Year Awarded: 2001
---	--	---	---

Request Summary

Departure Information: Date: 10/31/2005 City: Richmond State: VA Country: US	Destination Information: Return Date To US: 02/22/2006 City: Paris Country: FR
---	--

Reason for Request

Travel plans would be entered here.

Figure 21: Travel Request Details

3. Click the Disapprove button.

The Disapproval Reason screen is displayed with a field available for you to enter the reason you are disapproving the travel request. The reason you enter in this screen will be sent in the disapproval notification email that is sent to the fellow.

Request Summary	
Departure Information: Date: 01/01/2004 City: test State: AL Country: US	Destination Information: Return Date To US: 05/01/2004 City: test Country: US
Reason for Request	
I want to travel.	
Disapproval Reason	
(Must be less than 255 characters.)	
<input type="text"/>	
<input type="button" value="Submit"/> <input type="button" value="Cancel"/>	

Figure 22: Travel Request Disapproval Reason Screen

4. Enter a disapproval reason.

5. Click the Submit button.

A confirmation screen is displayed indicating you have successfully disapproved the travel request. You may select the CO Home Page link to return to your home page and task list. The request will no longer be available in your pending requests list. Once you have disapproved the travel request, an email will be sent to the fellow informing them that their travel allowance request has been disapproved.

3.4 Managing Activity Report Completion

Coordinating Officials can track fellow’s completion of annual activity reports using the Activities Reports Not Submitted report system.

1. In your Coordinating Official Task list, click Activities Reports Not Submitted.

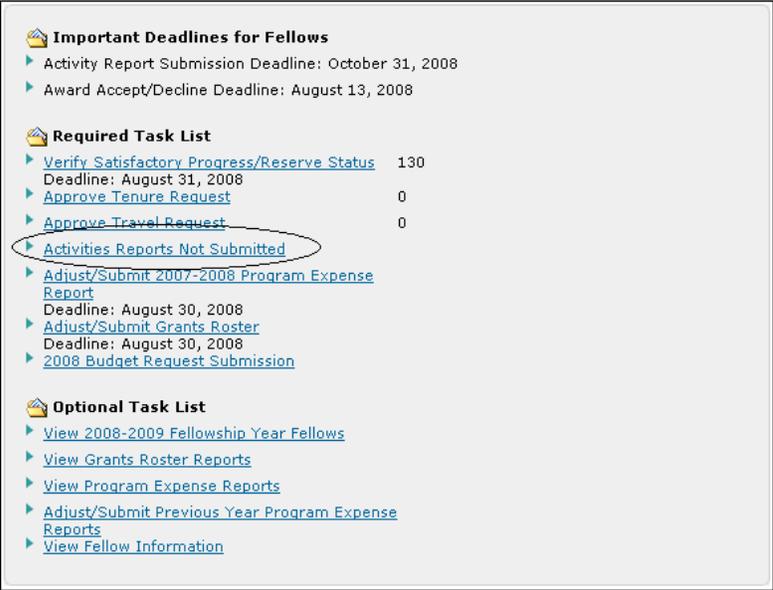


Figure 23: Activities Reports Not Submitted Link

2. Select an academic year in the dropdown list to search, and click the Search button.



Figure 24: Activities Reports Not Submitted Academic Year Search

A list of the fellows who have not yet submitted their Activity Report for that tenure year displays.

Academic Year 2007-2008

7 Fellows found, displaying 1 to 7 1

Fellow ID	Fellow Name	Months on Tenure for 2007-2008	Months on Reserve for 2007-2008	Award Year	Current Organization
TESTA00024	atest24, Fellow	12	0	2006	University of Texas at Austin
TESTA00025	atest25, Fellow	12	0	2006	University of Texas at Austin
TESTA00026	atest26, Fellow	12	0	2006	University of Texas at Austin
TESTA00027	atest27, Fellow	12	0	2006	University of Texas at Austin
TESTA00028	atest28, Fellow	0	12	2006	University of Texas at Austin
TESTA00031	atest31, Fellow	12	0	2005	University of Texas at Austin
TESTA00034	atest34, Fellow	12	0	2004	University of Texas at Austin

Export options: [Excel](#)

Figure 25: Activities Reports Not Submitted Report

3.5 Verifying satisfactory progress/reserve status

Each year, you are required to submit either a satisfactory or unsatisfactory rating for each of the fellows that are on tenure at your organization that are eligible to declare for the coming year. You must also submit a reserve verification for all fellows who are on reserve at your organization.

You will be notified via email each year to alert you as to when progress may be verified. Once you have received the email notification, you may logon to the GRFP application and the Verify Satisfactory Progress/Reserve Status link will be available in your task list. The task list will also display the number of fellows that have pending ratings.

The screenshot shows a web-based task list interface. It is divided into three sections: 'Important Deadlines for Fellows', 'Required Task List', and 'Optional Task List'. Under 'Important Deadlines for Fellows', there are two items: 'Activity Report Submission Deadline: October 31, 2008' and 'Award Accept/Decline Deadline: August 13, 2008'. The 'Required Task List' section contains several items, each with a count to its right. The first item, 'Verify Satisfactory Progress/Reserve Status', is circled in red and has a count of 130. Other items include 'Approve Tenure Request' (0), 'Approve Travel Request' (0), 'Activities Reports Not Submitted', 'Adjust/Submit 2007-2008 Program Expense Report' (Deadline: August 30, 2008), 'Adjust/Submit Grants Roster' (Deadline: August 30, 2008), and '2008 Budget Request Submission'. The 'Optional Task List' section includes 'View 2008-2009 Fellowship Year Fellows', 'View Grants Roster Reports', 'View Program Expense Reports', 'Adjust/Submit Previous Year Program Expense Reports', and 'View Fellow Information'.

Figure 26: Verify Satisfactory Progress/Reserve Status Link

3.5.1 Verifying Satisfactory Progress

A satisfactory progress rating for a fellow indicates that a fellow is making satisfactory progress in their studies and should be eligible to use tenure the next year. If a fellow is on tenure during the academic year, they must have a satisfactory rating verified for them before they are eligible to use tenure during the next academic year. Under the On Tenure “academic year” tab is the list of fellows that are eligible to use tenure the next year that need their progress verified. The academic year will change each year and will reflect the appropriate academic year for which you should review to verify satisfactory progress by the Fellow.

To Verify Satisfactory Progress:

1. Select the Verify Satisfactory Progress/Reserve Status link from your task list.

A list of all fellows who are on tenure, are eligible to declare for the coming year, and who have pending ratings is displayed. You may sort the list by clicking each of the column headings to sort the list by that column.

The screenshot shows a web interface titled "Verify Satisfactory Progress/Reserve Status". It has two tabs: "On Tenure 2004-2005" (selected) and "On Reserve 2004-2005". Below the tabs is a message: "You may also report that a fellow has not performed satisfactorily. You may choose multiple Fellows at once when reporting a satisfactory rating. However, to report an unsatisfactory rating, you may only select one fellow at a time as you will be asked to provide a brief comment regarding the rating." Below this is a pagination link "[Prev] 2, 3, 4, 5, 6, 7, 8, 9 [Next]". The main content is a table with 135 items found, displaying 106 to 120. The table has columns: "Select All", "Fellow ID", "Fellow Name", "Year Awarded", "Declared for 2005-2006", "Declared Field of Study for 2005-2006", and "Declared Tenure Status for 2005-2006".

Select All	Fellow ID	Fellow Name	Year Awarded	Declared for 2005-2006	Declared Field of Study for 2005-2006	Declared Tenure Status for 2005-2006
<input type="checkbox"/>	TESTY00971	yttest971, Fellow	2004	No	N/A	N/A
<input type="checkbox"/>	TESTY00972	yttest972, Fellow	2004	No	N/A	N/A
<input type="checkbox"/>	TESTY00973	yttest973, Fellow	2004	No	N/A	N/A
<input type="checkbox"/>	TESTY00974	yttest974, Fellow	2004	No	N/A	N/A
<input type="checkbox"/>	TESTY00975	yttest975, Fellow	2004	No	N/A	N/A
<input type="checkbox"/>	TESTY00976	yttest976, Fellow	2004	No	N/A	N/A
<input type="checkbox"/>	TESTY00977	yttest977, Fellow	2004	No	N/A	N/A
<input type="checkbox"/>	TESTY00978	yttest978, Fellow	2004	No	N/A	N/A
<input type="checkbox"/>	TESTY00979	yttest979, Fellow	2004	No	N/A	N/A

Figure 27: Fellow’s Rating List – On Tenure

2. Select the fellow(s) you wish to verify progress for by selecting the checkbox next to the fellow’s name.

If you wish to select all fellows, you may click the Select All button at the top of the checkbox column.

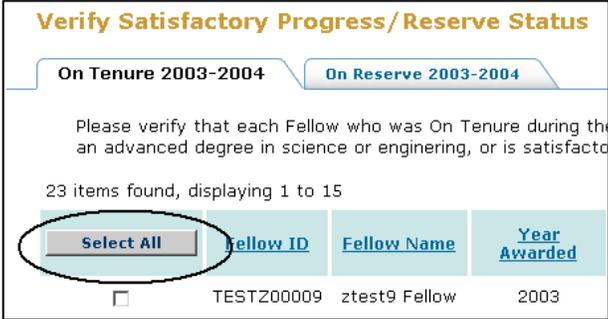


Figure 28: Select All Fellows Button

3. Click the Satisfactory button.

A screen is displayed which lists the selected fellows and the satisfactory progress statement.

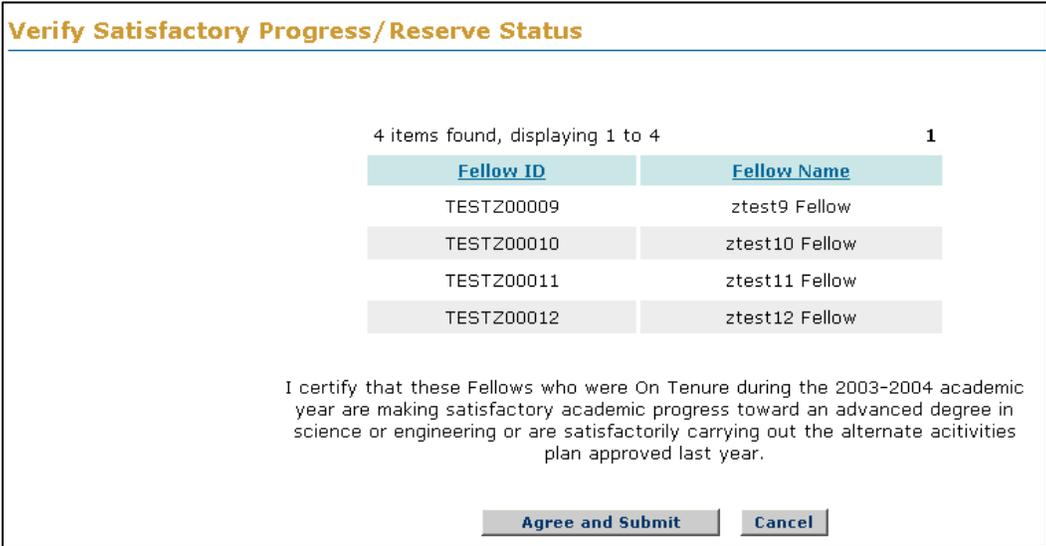


Figure 29: List of Fellows and Satisfactory Rating Statement

4. Click the Agree and Submit button.

A confirmation screen is displayed indicating you have successfully verified satisfactory progress for the selected fellows. You may select the CO Home Page link to return to your home page and task list. Once you verified satisfactory progress for a fellow, that fellow will no longer appear in your pending ratings list.

3.5.2 Verifying Unsatisfactory Progress

An unsatisfactory rating for a fellow indicates that a fellow is not making satisfactory progress in their studies and should be not eligible to use tenure the next year until the issue is resolved. Once you have verified unsatisfactory progress for a fellow, NSF will be notified and may contact you to discuss the rating.

To Verify Unsatisfactory Progress:

- 1. Select the Verify Satisfactory Progress/Reserve Status link from your task list.

A list of all fellows who are on tenure, are eligible to declare for the coming year, and who have pending ratings is displayed. You may sort the list by clicking each of the column headings to sort the list by that column.

Verify Satisfactory Progress/Reserve Status

On Tenure 2004-2005 On Reserve 2004-2005

You may also report that a fellow has not performed satisfactorily. You may choose multiple Fellows at once when reporting a satisfactory rating. However, to report an unsatisfactory rating, you may only select one fellow at a time as you will be asked to provide a brief comment regarding the rating.

135 items found, displaying 106 to 120 [Prev] 2, 3, 4, 5, 6, 7, 8, 9 [Next]

Select All	Fellow ID	Fellow Name	Year Awarded	Declared for 2005-2006	Declared Field of Study for 2005-2006	Declared Tenure Status for 2005-2006
<input type="checkbox"/>	TESTY00971	yttest971, Fellow	2004	No	N/A	N/A
<input type="checkbox"/>	TESTY00972	yttest972, Fellow	2004	No	N/A	N/A
<input type="checkbox"/>	TESTY00973	yttest973, Fellow	2004	No	N/A	N/A
<input type="checkbox"/>	TESTY00974	yttest974, Fellow	2004	No	N/A	N/A
<input type="checkbox"/>	TESTY00975	yttest975, Fellow	2004	No	N/A	N/A
<input type="checkbox"/>	TESTY00976	yttest976, Fellow	2004	No	N/A	N/A
<input type="checkbox"/>	TESTY00977	yttest977, Fellow	2004	No	N/A	N/A
<input type="checkbox"/>	TESTY00978	yttest978, Fellow	2004	No	N/A	N/A
<input type="checkbox"/>	TESTY00979	yttest979, Fellow	2004	No	N/A	N/A

Figure 30: Fellow’s Rating List – On Tenure

- 2. Select the fellow you wish to verify progress for by selecting the checkbox next to the fellow’s name.

- 3. Once the fellow you wish to verify progress is checked off, Click the Unsatisfactory button. The system will then prompt you to enter a reason for the unsatisfactory progress.

Declare Unsatisfactory Progress

* Required Field

Fellow Summary

Fellow ID: TESTY00971
Fellow Name: ytest971, Fellow
Year Awarded: 2004
Declared for year 2005: No
Declared Field Of Study: N/A
Declared Tenure Status: N/A

***Reasons for Unsatisfactory Progress**
(Must be less than 255 characters.)

I certify that this fellow, who was On Tenure during the 2004-2005 academic year, is **NOT** making satisfactory academic progress toward an advanced degree in science or engineering, or is **NOT** satisfactorily carrying out the alternate activities plan approved last year.

Figure 31: Declaring Unsatisfactory Progress

- 4. Enter the reasons for unsatisfactory progress in the Unsatisfactory Progress Field (no more than 255 characters).
- 5. Press the Agree and Submit Button

A screen is displayed that confirms that you have successfully submitted an unsatisfactory rating for a fellow.

Fellowship Administration | HOME

CONFIRMATION

Submit Fellow's Rating for - Co jco
You have successfully submitted an unsatisfactory rating for Fellow ytest971.

[CO Home Page](#)

Figure 32: Confirmation of Unsatisfactory Rating

- 6. Click the Agree and Submit button.

A confirmation screen is displayed indicating you have successfully submitted an unsatisfactory progress for the selected fellow. You may select the CO Home Page link to return to your home page and task list. Once you verified unsatisfactory progress for a fellow, an email will be sent to NSF. NSF may then contact you to provide additional information regarding the fellow and reason for the rating.

3.5.3 Submitting Reserve Verifications

Each year, a reserve verification must be submitted for fellows who are on reserve at your organization. A reserve verification indicates that the fellow has been on reserve during the academic year and has not used any of their tenure. Under the On Reserve “academic year” tab is the list of fellows that are on reserve that need a pending reserve status verified. The academic year will change each year and will reflect the appropriate academic year for which you should review to verify reserve status by the Fellow.

To Submit a Reserve Verification(s):

- 1. Select the Verify Satisfactory Progress/Reserve Status link from your task list.
- 2. Select the On Reserve tab to display the list of fellows pending reserve verifications.

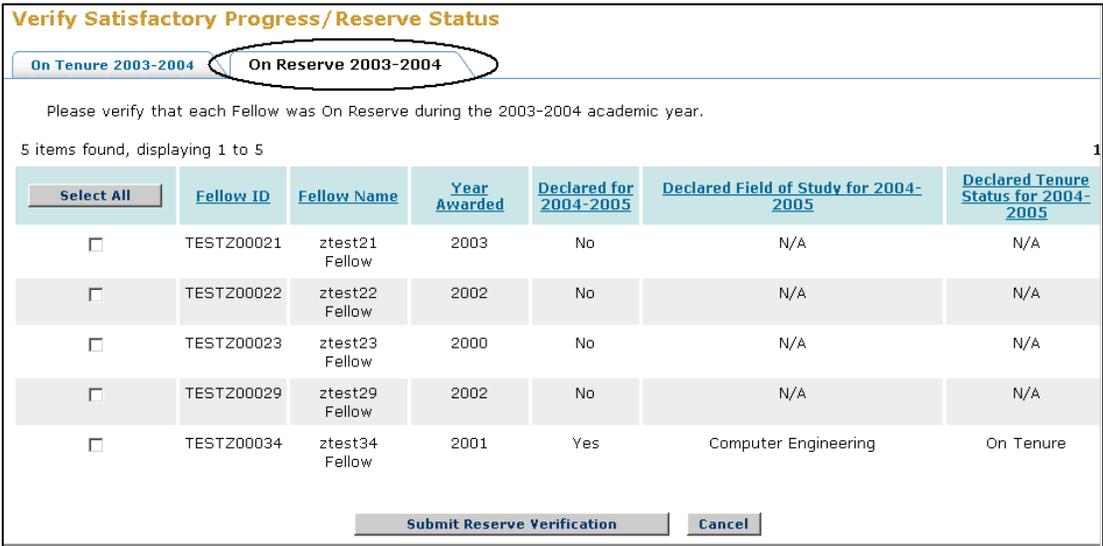


Figure 33: On Reserve Tab

- 3. Select the fellow(s) you wish to submit a verification for by selecting the checkbox next to the fellow’s name.

If you wish to select all fellows, you may click the Select All button at the top of the checkbox column.



Figure 34: Select All Fellows Button

4. Click the Submit Reserve Verification button.

A screen is displayed which lists the selected fellows and the reserve verification statement.



Figure 35: List of Fellows and Reserve Verification Statement

5. Click the Agree and Submit button.

A confirmation screen is displayed indicating you have successfully submitted reserve verifications for the selected fellows. You may select the CO Home Page link to return to your home page and task list. Once you have submitted a reserve verification for a fellow, the fellow will no longer appear in your pending verifications list.

3.6 Viewing the Fellowship Year Fellows Report

The Fellowship Year Fellows Report is a real time report that details the fellows who are currently affiliated with your organization for the current tenure year as well as each fellow's eligibility for the next year of tenure. You may view the report at any time using the Fellowship Year Fellows Report link in your task list. All changes that are made to a fellow's tenure for the current year will be reflected in this report upon approval of the changes.

Important Deadlines for Fellows

- ▶ Activity Report Submission Deadline: October 31, 2008
- ▶ Award Accept/Decline Deadline: August 13, 2008

Required Task List

- ▶ [Verify Satisfactory Progress/Reserve Status](#) 130
Deadline: August 31, 2008
- ▶ [Approve Tenure Request](#) 0
- ▶ [Approve Travel Request](#) 0
- ▶ [Activities Reports Not Submitted](#)
- ▶ [Adjust/Submit 2007-2008 Program Expense Report](#)
Deadline: August 30, 2008
- ▶ [Adjust/Submit Grants Roster](#)
Deadline: August 30, 2008
- ▶ [2008 Budget Request Submission](#)

Optional Task List

- ▶ [View 2008-2009 Fellowship Year Fellows](#)
- ▶ [View Grants Roster Reports](#)
- ▶ [View Program Expense Reports](#)
- ▶ [Adjust/Submit Previous Year Program Expense Reports](#)
- ▶ [View Fellow Information](#)

Figure 36: Fellowship Year Fellows Report Link

TIP: It is recommended that you regularly check your fellows report to ensure that the list of fellows associated with your organization and their statuses is accurate. Any inconsistencies should be reported to NSF for resolution.

To View the Fellowship Year Fellows Report:

1. Select the View Fellowship Year Fellows Report link from your task list.

The current Fellowship year’s Fellows Report is displayed. The report includes the fellow’s tenure information for the current tenure year and indicates whether they are currently eligible for tenure for the next academic year. The report also displays whether they have declared tenure for the next academic year. You may sort the report by any of the columns by clicking the column heading.

Boston College | 2008-2009

344 items found, displaying 1 to 15 [Prev] 1, 2, 3, 4, 5, 6, 7, 8 [Next]

Fellow ID	Fellow Name	Field of Study	Tenure Start	Tenure Months Used	Reserve Months Used	Forfeit Months Used	Tenure Status	Declared tenure for 2009-2010	Eligible for 2009-2010 Tenure
-----------	-------------	----------------	--------------	--------------------	---------------------	---------------------	---------------	-------------------------------	-------------------------------

Figure 37: Sortable Column Headings

If you would like to print the report, you can select the View PDF Print Format link. The report will be displayed in a separate window in Adobe PDF format.

Fellows Report

To view this report in PDF format, click "View PDF". A new browser window will open.
To print the PDF, use your browser's print function in the new window.

Notes:
-Report year begins June 1st.
-To view a list of Fellows for prior Fellowship Years, please view the associated Program Expense Report for that year.
-This report does not reflect changes made to Fellow records that have not yet been approved by the GRF Program Office.

Boston College | 2008-2009

344 items found, displaying 16 to 30 [Prev] 1, 2, 3, 4, 5, 6, 7, 8 [Next]

Fellow ID	Fellow Name	Field of Study	Tenure Start	Tenure Months Used	Reserve Months Used	Forfeit Months Used	Tenure Status	Declared tenure for 2009-2010	Eligible for 2009-2010 Tenure
TESTE00021	etest21, Fellow	Engineering - Computer Engineering		0	12	0	Undeclared - not rolled over	No	Yes
TESTE00022	etest22, Fellow	Engineering - Computer Engineering		0	24	0	Undeclared - not rolled over	No	Yes
TESTE00023	etest23, Fellow	Engineering - Computer Engineering		24	24	0	Undeclared - not rolled over	No	Yes
TESTE00024	etest24, Fellow	Engineering - Computer Engineering	Fall	24	0	0	On Tenure	No	Yes
TESTE00025	etest25, Fellow	Engineering - Computer Engineering	Fall	24	0	0	On Tenure	No	Yes
TESTE00026	etest26, Fellow	Engineering - Computer Engineering	Fall	24	0	0	On Tenure	No	Yes

Figure 38: Fellowship Year Fellows Report

NOTE: A fellow is eligible for tenure for the next academic year if they have used less than 36 months of tenure and have a satisfactory rating for the current academic year. For further details on eligibility, please refer to the NSF GRFP Coordinating Officials' Guide.

3.7 Managing Budget Request Submission Activities

The Grants Roster Report is an annual report that details the projected amount of money that your institution plans to obligate to students for the upcoming Fellowship year. Prior to each Fellowship year, you are required to access the report, make any adjustments that are needed, and submit the report to NSF. Each Organization is allowed up to two approved Grants Roster reports per Fellowship Year. After submission and approval of your Organization's 2nd Grants Roster Report, the option to modify and submit a Grants Roster report will no longer be available. Any subsequent changes to Fellow records should be reflected in the Program Expense Report for that year.

When submitting a Grants Roster report, you will be required to verify your Organization's Financial Summary. The Financial Summary details the balance of your Organization's current GRF Award as well as the cumulative expenses recorded against this Award. This information combined with projected expenses for the upcoming year (as per the Grants Roster Report) are used to calculate a Maximum Budget Request. This Maximum Budget Request is your Organization's projected need for funding for the upcoming Fellowship Year.

When you log onto the GRFP system, the Grants Roster report will be accessible using either the Budget Request Submission link or Adjust/Submit Grants Roster Report link in your task list. You may use this link to review, submit, adjust, and re-submit previously submitted Grants Roster Reports for the upcoming Fellowship Year.



Figure 39: Budget Request Submission Link

In addition to adjusting and submitting Grants Roster Reports, you may also view Grants Roster Reports at any time using the View Grants Roster Reports link available in your optional task list. Each time you make changes to an grants roster report to submit to NSF for approval, the changes that you submit are saved as a unique report version that can be reviewed at a later date. This task allows you to review the current version of each Grants Roster Report and the version history of each report for your university.



Figure 40: View Grants Roster Report Link

3.7.1 Submitting a Grants Roster Report and Verifying the Financial Summary

If there are no changes when you review your Grants Roster report, you may chose to submit the report with no adjustments. If you wish to make adjustments to your Grants Roster Reports (previously approved, rejected or unsubmitted), you can change line item values and submit the modified report to NSF for review. Any changes made to Fellow records will be reflected in the associated fellow records following NSF approval of the Grants Roster report.

To View and Adjust a Grants Roster Report

1. Select the Budget Request Submission link from your task list.

The Budget Request Submission Activities screen is displayed. This screen contains a list of budget request submission activities that should be completed prior to each Fellowship Year. Alternatively you may select the Adjust/Submit Grants Roster link to directly access your Grants Roster Report.



Figure 41: Budget Request Activities Screen

2. Click the Edit link for the Adjust/Submit Grants Roster Report activity.

The Grants Roster Report for the upcoming fellowship year is displayed

Grants Roster Report

Duke University | 2008-2009 | Version # 1

52 items found, displaying 1 to 15 [Prev] 1, 2, 3, 4 [Next]

Fellow ID	Fellow Name	Tenure Months	Tenure Start	Fellowship Year Status	Field of Study	Stipend	COE	Travel	Total	Action
TESTG00034	gtest34, Fellow	12	Fall	On Tenure	Engineering - Computer Engineering	\$30,000.00	\$10,500.00	\$0.00	\$40,500.00	Adjust
TESTG00031	gtest31, Fellow	12	Fall	On Tenure	Engineering - Computer Engineering	\$30,000.00	\$10,500.00	\$0.00	\$40,500.00	Adjust
TESTG00028	gtest28, Fellow	0	Fall	On Reserve	Engineering - Computer Engineering	\$0.00	\$0.00	\$0.00	\$0.00	Adjust
TESTG00027	gtest27, Fellow	12	Fall	On Tenure	Engineering - Computer Engineering	\$30,000.00	\$10,500.00	\$0.00	\$40,500.00	Adjust
TESTG00026	gtest26, Fellow	12	Fall	On Tenure	Engineering - Computer Engineering	\$30,000.00	\$10,500.00	\$0.00	\$40,500.00	Adjust
TESTG00025	gtest25, Fellow	12	Fall	On Tenure	Engineering - Computer Engineering	\$30,000.00	\$10,500.00	\$0.00	\$40,500.00	Adjust

Figure 42: Grants Roster Report and Adjust Link

3. Select the Adjust link next to the fellow’s record for which you wish to adjust tenure status or costs.

The fellow’s current tenure status, stipend, COE, and travel costs are displayed in editable form.

Adjust Grants Roster Report

Duke University | 2008-2009

1 item found. 1

Fellow ID	Fellow Name	Tenure Months	Tenure Start	Fellowship Year Status	Field of Study	Stipend	COE	Travel	Total
TESTG00034	gtest34, Fellow	12	Fall	On Tenure	Engineering - Computer Engineering	\$30,000.00	\$10,500.00	\$0.00	\$40,500.00

*Current Fellowship Status: Fellowship Year Status:

Months on Tenure: Adjusted Stipend:

Months on Reserve: Adjusted COE:

Months on Forfeit: Adjusted Travel:

Months Unaccounted For: *(Dollar signs and commas are not allowed)*

* Comments:
(Must be less than 800 characters.)

Figure 43: Adjust Fellow Tenure Status and Cost Screen

4. Enter your adjustments to the tenure status, stipend, COE, and/or travel costs and your comments regarding the adjustment.

5. If you made changes to tenure status or tenure months, you must select Calculate to calculate the appropriate stipend and COE amounts for that fellow before saving the changes.

Note: Stipend amounts are calculated using a prorated value per month. COE amounts are calculated based on the number of months on Tenure. If a fellow is On Tenure for 6 months or greater, the COE amount is \$10,500. If a fellow is On Tenure for less than 6 months, the COE amount is \$0.00. If you make changes to the calculated amounts, you will be required to enter a comment explaining the variance.

6. Click the Save button

The adjusted report is displayed. The adjusted fellow records are flagged with a Y in the Adj column. If you wish to view the original report without any adjustments reflected, you may click the View Grants Roster Report Without All Adjustments button available at the bottom of the page.

Grants Roster Report With Adjustments

Boston College | 2008-2009 | Version #2

7 items found, displaying 1 to 7 1

Fellow ID	Fellow Name	Tenure Months	Tenure Start	Adj Y/N	Adj Comments	Fellowship Year Status	Field of Study	Stipend	COE	Travel	Total	Action
TESTE00028	etest28, Fellow	12	Fall	Y	test	On Tenure	Engineering - Computer Engineering	\$30,000.00	\$10,500.00	\$0.00	\$40,500.00	Adjust
TESTE00024	etest24, Fellow	12	Fall	Y	test	On Tenure	Engineering - Computer Engineering	\$30,000.00	\$10,500.00	\$0.00	\$40,500.00	Adjust
TESTE00034	etest34, Fellow	12	Fall	N		On Tenure	Engineering - Computer Engineering	\$30,000.00	\$10,500.00	\$0.00	\$40,500.00	Adjust
TESTE00031	etest31, Fellow	12	Fall	N		On Tenure	Engineering - Computer Engineering	\$30,000.00	\$10,500.00	\$0.00	\$40,500.00	Adjust

Figure 44: Adjusted Record Flag on the Grants Roster Report with Adjustments Screen

If your Organization already has one approved version of your Grants Roster Report, the subtotal box will display variance details from the 1st approved version of the Grants Roster report.

Sub Total

	# Of Fellows	Stipend	COE	Travel	Total
Total Fellows on Tenure:	7	\$210,000.00	\$73,500.00	\$0.00	\$283,500.00
Total Fellows on Reserve:	0	\$0.00	\$0.00	\$0.00	\$0.00
Total Fellows in Other Fellowship Status:	0	\$0.00	\$0.00	\$0.00	\$0.00
Total:	7	\$210,000.00	\$73,500.00	\$0.00	\$283,500.00
Total 1st Approved Version:	7	\$180,000.00	\$63,000.00	\$0.00	\$243,000.00
Variance from 1st Approved Version:	0	\$30,000.00	\$10,500.00	\$0.00	\$40,500.00

Figure 45: Grants Roster Report Subtotal with Variances

Additionally, a Variance Details box will display detailing the differences in fellow records from the 1st approved version to the current version of the Grants Roster Report.

Variance Details			
	1st Approved Version	Current Version	Variance
Total Fellows on Tenure:	6	7	1
Total Fellows on Reserve:	1	0	1
Total Fellows in Other Fellowship Status:	0	0	0
Total:	7	7	0

Figure 46: Grants Roster Report Variance Details Box

7. Enter your comments on the entire report in the General Comments box.

If you would like to save your adjustments and comments without submitting the report, click the Save Report button. This functionality will allow you to save your work on the report and access the report at a later time for submission.

8. Once you have entered all of your adjustments and are ready to review the Financial Summary, click the Review Financial Summary and Submit Grants Roster Report button.

The Verify Financial Summary screen displays

To Verify a Financial Summary and Submit a Grants Roster Report Review the information presented in the Financial Summary for accuracy.

Financial Summary

Financial Summary | Boston College | 2008-2009

Current Primary Award ID: 0757737 [Financial Summary Help](#)

Award Effective Date: 10/01/2007

Award Expiration Date: 09/30/2012

Cumulative Award Amount: \$81,000.00 [View History](#)

Carryover from Other Award(s): \$1,500,000.00 [View Other Awards](#) **Carryover Explanation:**

Total Amount Available: \$1,581,000.00

	Program Level Expenses	Institution Level Drawdowns FFR Submitted as recorded in NSF FAS	Variance
	\$9,112,500.00 View	\$42,240.00	\$9,070,260.00
Annual Surplus/(Deficit):	(\$7,531,500.00)	\$1,538,760.00	

Projected Grants Roster Expenses: \$283,500.00 [Edit](#)

Maximum Budget Request: \$7,815,000.00 **Temp Prop ID:**

Comments (to be displayed as a portion of budget justification):
(Must be less than 800 characters.)

[Save](#) [Submit Grants Roster Report](#) [Back](#)

Figure 47: Review Financial Summary Screen

- 1. To view details of the Current Primary Award, select the View History link next to the Cumulative Award Amount

Current Primary Award History

Current Primary Award History | Boston College | 2008-2009

Current Primary Award ID: 0757737
Award Effective Date: 10/01/2007
Award Expiration Date: 09/30/2012

Amendment Details

1 item found. 1

Amendment Number	Amendment Effective Date	Award Amount
000	09/25/2007	\$81,000.00

Export options: [Excel](#)

Cumulative Total: \$81,000.00

[Back](#)

Figure 48: View Award History Screen

- 2. To view details of other Active awards for your institution which may be contributing to a carryover balance, select the View Other Awards link next to Carryover from Other Awards



Figure 49: View Other Awards Screen

- 3. To view expenses recorded against your current Award select the View link next to your Program Level Expenses. This link will open the View Program Expense Reports screen to allow you to view your previous Program Expense Reports. To edit your Program Expense Reports, select the appropriate Adjust/Submit Program Expense Reports link from your CO task menu or Optional Task menu.
- 4. To return to the Grants Roster report for the upcoming year and make edits, select the Edit button next to Projected Grants Roster Expenses
- 5. If your Organization has been notified that it must submit a proposal through FastLane for the upcoming Fellowship Year, enter the Temp Prop ID in the Temp Prop ID box.
- 6. Enter any Comments you have for the NSF Program Office pertaining to the Financial Summary
- 7. Select Submit Grants Roster Report to submit the Grants Roster Report and related Financial Summary.



Figure 50: Submit Grants Roster Button

A confirmation screen is displayed indicating you have successfully submitted your Grants Roster Report. You may select the CO Home Page link to return to your home page and task list.

The submitted Grants Roster Report and associated Financial Summary is forwarded to NSF for review and approval. A report in submitted status cannot be modified further until NSF either approves or rejects the report. If NSF disapproves your report, the Coordinating Officials at your university will be notified via email and the report status will change in the Adjust/Submit Grants Roster Reports list.

3.7.2 Viewing Grants Roster Reports and Financial Summaries

To View a Grants Roster Report and its version history:



Figure 51: View Grants Roster Reports Link

1. Select the View Grants Roster Report link from your Optional Task List.

The list of all year’s modified or submitted grants roster reports is displayed, including the current report status, the academic year of the report, and a link to view the version history of the grants roster report for that particular academic year. The list of reports can be searched to find a report from a particular academic year.

Note: Grants Roster reports are only available dating back to the 2008 2009 Fellowship Year. To view information on fellows prior to 2008-2009, access the relevant Grants Roster Reports or the View Fellow Information link.

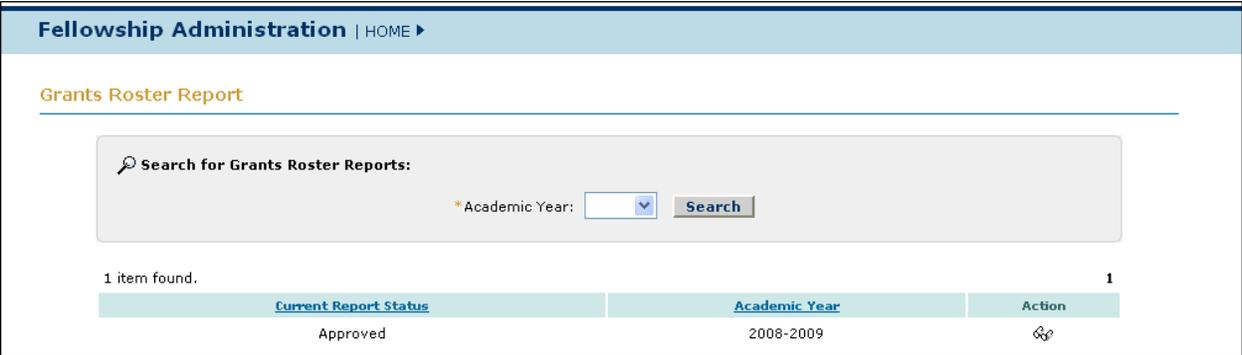


Figure 52: View Grants Roster Reports Screen

2. Select the link next to the academic year's report for which you would like to see a version history.

The View Grants Roster Report screen displays. If a version history exists for the particular report, the version history is listed at the top of the page. The version history lists general report information about each version of the report: adjust/submit date, report status, NSF review date, and a link to view that particular version of the report. The details of the most current version of the report are automatically displayed below. You can toggle back and forth between the various versions of the Grants Roster report by clicking the links in the version history table to view a particular version. Report versions record adjustments made to fellow records and the report status states whether those particular line item adjustments have been approved by NSF.

View Grants Roster Reports

Boston College | Version History 2008-2009

5 items found, displaying 1 to 5 1

Version #	Adjust/Submit Date	Report Status	NSF Review Date	Action
1	07/23/2008	Original		
2	07/23/2008	Rejected	07/24/2008	
3	07/24/2008	Approved	07/24/2008	
4	07/24/2008	Rejected	07/25/2008	
5	07/25/2008	Unsubmitted		Shown Below

Version # 5 | Unsubmitted

7 items found, displaying 1 to 7 1

Fellow ID	Fellow Name	Tenure Months	Adj Y/N	Adj Comments	Fellowship Year Status	Field of Study	Stipend	COE	Travel	Total
TESTE00024	etest24, Fellow	12	Y	; test	On Tenure	Engineering - Computer Engineering	\$30,000.00	\$10,500.00	\$0.00	\$40,500.00
TESTE00028	etest28, Fellow	12	Y	test;	On Tenure	Engineering - Computer Engineering	\$30,000.00	\$10,500.00	\$0.00	\$40,500.00
TESTE00025	etest25, Fellow	12	N		On Tenure	Engineering - Computer Engineering	\$30,000.00	\$10,500.00	\$0.00	\$40,500.00
TESTE00026	etest26, Fellow	12	N		On Tenure	Engineering - Computer Engineering	\$30,000.00	\$10,500.00	\$0.00	\$40,500.00

Figure 53: View Grants Roster Report Screen

3. To view the Financial Summary associated with a particular Grants Roster Report, select the View Financial Summary button.

3.7.3 Viewing and Understanding Budget Request PDFs

If you are requested by the GRF Program Office to submit a FastLane proposal for the upcoming fellowship year, you will need to attach certain PDF documents to the proposal. These PDF documents can be generated through the GRFP system under the Budget Request Activities link in your task list. The PDF documents are also accessible from the Adjust/Submit Grants Roster page. PDF documents will not be available until the Grants Roster has been submitted to NSF for approval.

To access the PDF documents:

1. Select the Budget Request Activities link from the Required Task List

The Budget Request Activities screen is displayed

2. Select the Generate link next to the PDF document you wish to view

The two PDF documents available for generation are summary documents meant to be attached as portions of a FastLane proposal. The two documents are:

- a. Project Description PDF: The Project Summarizes the Grants Roster details and should be attached as the Project Description section of the FastLane proposal.
- b. Budget Summary PDF: Summarizes Budget Request and Financial Summary details which should be attached as the Budget Justification section of your FastLane Proposal. Contains breakdown of Stipend, Subsistence, Travel and Other amounts to be included in Project Budget section of your FastLane Proposal. The Stipend, Subsistence amounts are calculated using the Stipend and COE totals from the Grants Roster and are adjusted for any Surplus that might exist in the Financial Summary. The Other amount represents any deficit that exists in the Financial Summary.

NOTE: If your Organization has not received a request to submit a FastLane proposal for the upcoming year, these PDFs are not relevant to your organization. If you receive a request to submit a FastLane proposal, detailed instructions for submission will be included.

3.7.4 Understanding Report Versions

A new version of an Grants Roster Report starts when a Coordinating Official makes and saves the first line item adjustment to a fellow's record on a Grants Roster Report. The life of one version ends when NSF approves or rejects the report. When/if a Coordinating Official makes and saves additional adjustments to this particular year's Grants Roster Report, a new version will be created for that particular year. The Original version of the report is created the first time a Coordinating Official submits the Grants Roster Report. The Original version is a snapshot report of the fellow's tenure record details for the particular institution and year for which the Grants Roster Report was submitted before any of the Coordinating Official adjustments are approved and used to adjust fellow tenure records.

3.7.5 Understanding Report Statuses

Prior to submission by the Coordinating Official, adjusted and unadjusted Grants Roster Reports are in the status of "Unsubmitted," and are viewable through the Admin Module. If a GRFP Coordinating Official has submitted a Grants Roster Report with or without changes and the report is pending NSF review and approval, it will be displayed with a status of "Submitted". Grants Roster Reports that have previously been reviewed and approved by NSF are displayed with a status of "Approved". When you return a Grants Roster Report, the report is displayed with a status of "Rejected."

NOTE: If you have saved changes to a Grants Roster Report or submitted a Grants Roster Report to NSF, but NSF has not yet approved the report, it is possible that an NSF Official might modify a tenure record for a fellow for which you have submitted a modification in your Grants Roster Report. If this occurs, the change made by the NSF Official will override the change for this fellow that you have made in your Grants Roster Report, and the adjustment you have made will be removed from the system. If an adjustment you have made is removed in this way, you will receive a notification email. You must then log in and view your Grants Roster Report to ensure that no further adjustments are needed to this fellow's record. If your Grants Roster Report was in Submitted status when this change occurred, the submitted report will be saved off and the status will be set at Rejected. You may then go in to the report, make any necessary adjustments and resubmit.

3.8 Managing Program Expense Reports

Each year you are required to submit a Program Expense Report for your organization that details the costs that were paid to each fellow at your organization for the year. The Program Expense Report includes a detailed cost listing for each fellow, regardless of their tenure status for the year. The NSF will issue the report each year in the fall detailing the costs for the previous academic year. You are required to review the report and make any adjustments that are needed. You are also able to adjust the past five years' Program Expense Reports and resubmit them to the NSF for approval.

Each year, you will receive an email alerting you when the Program Expense Report is available for your review and validation. When you log onto the GRFP system, the Adjust/Submit Program Expense Report link for the most recent fellowship year will be available in your task list. During the time the Expense Report submission period is open, you may use this link to review, submit, adjust, and re-submit previously submitted Program Expense Report.

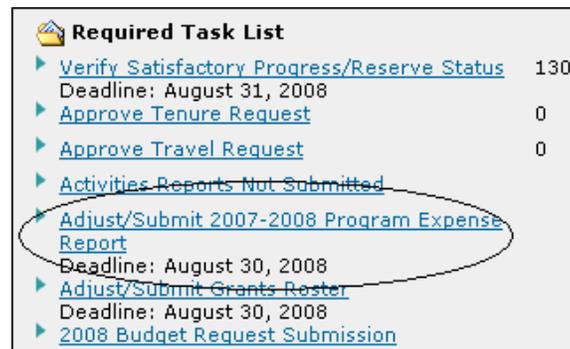


Figure 54: Adjust/Submit Program Expense Report Link

You may also review, submit, adjust and re-submit previously submitted Program Expense Reports for the four fiscal years preceding the current fiscal year. These prior Expense Reports



can be accessed by selecting the Adjust/Submit Previous Year Program Expense Reports link from the Optional Task List

Figure 55: Adjust/Submit Previous Year Program Expense Reports Link

In addition to adjusting and submitting Program Expense Reports, you may also view Program Expense Reports at any time using the View Program Expense Reports link available in your optional task list. Each time you make changes to a Program Expense Report to submit to NSF for approval, the changes that you submit are saved as a unique report version that can be reviewed at a later date. This task allows you to review the current version of each Program Expense Report and the version history of each report for your university.



Figure 56: View Approved Program Expense Reports Link

TIP: For detailed explanation of the Program Expense Report, please refer to the Coordinating Officials' Guide.

3.8.1 Submitting a Program Expense Report

If there are no changes when you review your Program Expense Report, you may choose to submit the report with no adjustments. If you wish to make adjustments to your Program Expense Reports (previously submitted or unsubmitted), you can change line item values and submit the modified report to NSF for review. The NSF will make the necessary adjustments to the fellow's tenure records. When your report has been approved by NSF, the Coordinating

Officials at your university will be notified via email and the report will be available in your Approved Program Expense Reports area.

To Submit a Program Expense Report

- 1. Select the Adjust/Submit Program Expense Report link from your task list.

The Adjust/Submit Program Expense Report screen is displayed. This screen contains a list of the Program Expense Reports that have been generated for your university within the last five years and the associated academic year.

Adjust/Submit Expenditure Reports

** Required Field*

Note: Missing years represent years in which no National Science Foundation Graduate Research Fellows attended the institution. During these years, no expenditure reports are available.

Select Expenditure Report to Adjust:

*Academic Year: 2007

21 items found, displaying 1 to 15 [Prev] 1, 2 [Next]

Report Status	Academic Year	Action
Generated	2007-2008	Adjust/Submit
unsubmitted	2006-2007	Adjust/Submit
unsubmitted	2005-2006	Adjust/Submit
Generated	2004-2005	Adjust/Submit
unsubmitted	2003-2004	Adjust/Submit

Figure 57: Adjust/Submit Program Expense Reports Screen 2

- 2. Click the Adjust/Submit link for the expenditure link and the associated academic year that you wish to submit with adjustments.

The Program Expense Report for the chosen academic year is displayed

Program Expense Report

To view this report in PDF format, click "View PDF". A new browser window will open. To print the PDF, use your browser's print function in the new window.  [View PDF](#)

[Program Expense Report Instructions](#)

Boston College | 2006-2007

118 items found, displaying 1 to 15 [Prev] 1, 2, 3, 4, 5, 6, 7, 8 [Next]

Fellow ID	Fellow Name	Tenure Start	Tenure Months	Adj (Y/N)	Adj Comment	Fellowship Year Status	Field of Study	Stipend	COE	Travel	Other	Total	Adjust
TESTY03750	ytest3750, Fellow	Fall	12	N		On Tenure	Engineering - Computer Engineering	\$30,000.00	\$10,500.00	\$0.00	\$0.00	\$40,500.00	Adjust
TESTY03749	ytest3749, Fellow	Fall	12	N		On Tenure	Engineering - Computer Engineering	\$30,000.00	\$10,500.00	\$0.00	\$0.00	\$40,500.00	Adjust
TESTY03748	ytest3748, Fellow	Fall	12	N		On Tenure	Engineering - Computer Engineering	\$30,000.00	\$10,500.00	\$0.00	\$0.00	\$40,500.00	Adjust
TESTY03747	ytest3747, Fellow	Fall	12	N		On Tenure	Engineering - Computer Engineering	\$30,000.00	\$10,500.00	\$0.00	\$0.00	\$40,500.00	Adjust
TESTY03746	ytest3746, Fellow	Fall	12	N		On Tenure	Engineering - Computer Engineering	\$30,000.00	\$10,500.00	\$0.00	\$0.00	\$40,500.00	Adjust
TESTY03745	ytest3745, Fellow	Fall	12	N		On Tenure	Engineering - Computer Engineering	\$30,000.00	\$10,500.00	\$0.00	\$0.00	\$40,500.00	Adjust

Figure 58: Program Expense Report and Adjust Link

3. Select the Adjust link next to the fellow’s record for which you wish to adjust costs.

The fellow’s current stipend, COE, travel, and other costs are displayed in editable form.

Program Expense Report

Boston College | 2006-2007

1 item found. 1

Fellow ID	Fellow Name	Tenure Start	Tenure Months	Fellowship Year Status	Field of Study	Stipend	COE	Travel	Other	Total
TESTY03750	ytest3750, Fellow	Fall	12	On Tenure	Engineering - Computer Engineering	\$30,000.00	\$10,500.00	\$0.00	\$0.00	\$40,500.00

* Current Fellowship Status: Fellowship Year Status:

Months on Tenure: Adjusted Stipend:

Months on Reserve: Adjusted COE:

Months on Forfeit: Adjusted Travel:

Months Unaccounted For: Adjusted Other:

(Dollar signs and commas are not allowed)

* Comments: (Must be less than 800 characters.)

Figure 59: Adjust Fellow Costs Screen

4. Enter your adjustments to the stipend, COE, travel, and/or other costs and your comments regarding the adjustment.

- Click the Save button.

The adjusted report is displayed. The adjusted fellow records are flagged with a Y in the Adj column. If you wish to view the original report without any adjustments reflected, you may click the View Program Expense Report Without My Adjustments button available at the bottom of the page.

Program Expense Report With My Adjustments

To view this report in PDF format, click "View PDF". A new browser window will open. To print the PDF, use your browser's print function in the new window. 

[Program Expense Report Instructions](#)

Boston College | 2007-2008

233 items found, displaying 1 to 15 [Prev] 1, 2, 3, 4, 5, 6, 7, 8 [Next]

Fellow ID	Fellow Name	Tenure Start	Tenure Months	Adj (Y/N)	Adj Comment	Fellowship Year Status	Field of Study	Stipend	COE	Travel	Other	Total	Adjus
TESTE00010	etest10, Fellow	Fall	3	Y	test	On Tenure	Social Sciences - other (specify) - GRFP Testing	\$7,500.00	\$2,625.00	\$0.00	\$0.00	\$10,125.00	Adjus
TESTE00013	etest13, Fellow	Fall	0	Y	test	On Reserve	Engineering - Computer Engineering	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	Adjus

Figure 60: Adjusted Record Flag on the Program Expense Report With My Adjustments Screen

- Enter your comments on the entire report in the General Comments box.

If you would like to save your adjustments and comments without submitting the report, click the Save Report button. This functionality will allow you to save your work on the report and access the report at a later time for submission.

Once you have entered all your adjustments and comments and are ready to submit the report, you must sign the electronic certification to certify that the Program Expense Report records are an accurate representation of the accrued student expenses over the tenure year.

(Must be less than 255 characters.)

General Comments:

I certify that these expenditures were accrued during the program year indicated above in support of NSF Graduate Fellows at this institution and may be charged against the NSF fellowship grants as noted above. I understand that these funds are subject to audit by the United States Government and I certify that the information on these forms is true and correct.

Electronically signed by: Fo afo
Date e-Signed: 05/31/2007

[View Expenditure Report Without My Adjustments](#) [Save Report](#) [Submit Report](#) [Cancel](#)

Figure 61: Program Expense Report Electronic Certification

- Read and check the certification to agree that the report accurately reflects the expenses generated by NSF Graduate Fellows during the associated tenure year. Make sure that your name displays accurately after "Electronically signed by:" and that the current date is listed.

8. Click the Submit Report button.

A confirmation screen is displayed indicating you have successfully submitted your Program Expense Report. You may select the CO Home Page link to return to your home page and task list.

The submitted Program Expense Report is forwarded to NSF for review and approval. A report in submitted status cannot be modified further until NSF either approves or rejects the report. If NSF disapproves your report, the Coordinating Officials at your university will be notified via email, and the report status will change in the Adjust/Submit Program Expense Reports list.

WARNING: If you have saved changes to a Program Expense Report or submitted a Program Expense Report to NSF, but NSF has not yet approved the report, it is possible that an NSF Official might modify a tenure record for a fellow for which you have submitted a modification in your Program Expense Report. If this occurs, the change made by the NSF Official will override the change for this fellow that you have made in your Program Expense Report, and the adjustment you have made will be removed from the system. If an adjustment you have made is removed in this way, you will receive a notification email. You must then log in and view your Program Expense Report to ensure that no further adjustments are needed to this fellow's record. If your Program Expense Report was in Submitted status when this change occurred, the submitted report will be saved off and the status will be set at Rejected. You may then go in to the report, make any necessary adjustments and resubmit.

3.8.2 Viewing Program Expense Reports

To View a Program Expense Report and its version history:



Figure 62: View Program Expense Reports Link

1. Select View Program Expense Reports link from your Optional Task List.

The list of all year's modified or submitted Program Expense Reports is displayed, including the current report status, the academic year of the report, and a link to view the version history of the Program Expense Report for that particular academic year. The list of reports can be searched to find a report from a particular academic year.

View Program Expense Reports

Note: Missing years represent years in which either no National Science Foundation Graduate Research Fellows attended the institution or the program expense report has not been adjusted or submitted yet.

Search for Program Expense Reports to View:

Academic Year:

1 item found.

Current Report Status	Academic Year	Action
Unsubmitted	2007-2008	

Figure 63: View Program Expense Reports Screen.

2. Select the link next to the academic year's report for which you would like to see a version history.

The View Program Expense Report screen displays. If a version history exists for the particular report, the version history is listed at the top of the page. The version history lists general report information about each version of the report: adjust/submit date, report status, NSF review date, and a link to view that particular version of the report. The details of the most current version of the report are automatically displayed below. You can toggle back and forth between the various versions of the Program Expense Report by clicking the links in the version history table to view a particular version. Report versions record adjustments made by GRFP Financial Officials, and the report status states whether those particular line item adjustments have been approved by NSF.

The report includes a list of the fellows, their tenure information, and their stipend, COE, travel, and other costs for the year. You may sort the report by any of the columns by selecting the column heading. There is also a summary section at the bottom of the screen that details the total number of fellows for the year and the total costs.

View Program Expense Report

Duke University | Version History 2006-2007

2 items found, displaying 1 to 2 1

Adjust/Submit Date	Report Status	NSF Review Date	Action
07/22/2008	Submitted		Shown Below
07/22/2008	Original		

To view this report in PDF format, click "View PDF". A new browser window will open.
To print the PDF, use your browser's print function in the new window.

[View PDF](#)

Adjust/Submit Date: 07/22/2008 | Submitted

181 items found, displaying 1 to 15 [Prev] 1, 2, 3, 4, 5, 6, 7, 8 [Next]

Fellow ID	Fellow Name	Fellowship Year Status	Adj (Y/N)	Adj Comments	Tenure Start	Tenure Months	Field of Study	Stipend	COE	Travel	Other	Total
TESTY03850	ytest3850, Fellow	On Tenure	N		Fall	12	Engineering - Computer Engineering	\$30,000.00	\$10,500.00	\$0.00	\$0.00	\$40,500.00
TESTY03849	ytest3849, Fellow	On Tenure	N		Fall	12	Engineering - Computer Engineering	\$30,000.00	\$10,500.00	\$0.00	\$0.00	\$40,500.00
TESTY03848	ytest3848, Fellow	On Tenure	N		Fall	12	Engineering - Computer Engineering	\$30,000.00	\$10,500.00	\$0.00	\$0.00	\$40,500.00
TESTY03847	ytest3847,	On Tenure	N		Fall	12	Engineering -	\$30,000.00	\$10,500.00	\$0.00	\$0.00	\$40,500.00

Figure 64: View Program Expense Report Screen.

- 3. If you wish to print the report, select the View PDF Print Format link located at the bottom of the screen.

The Program Expense Report is displayed in a printable, Adobe PDF format in a separate window. You may then print the report using the PDF toolbar.

3.9 Viewing Fellow Information

You may view tenure and travel information about the fellows who are associated with your organization using the View Fellow Information link available in your task list. You may view a fellow’s tenure records for each year, tenure change requests, and travel allowance requests.

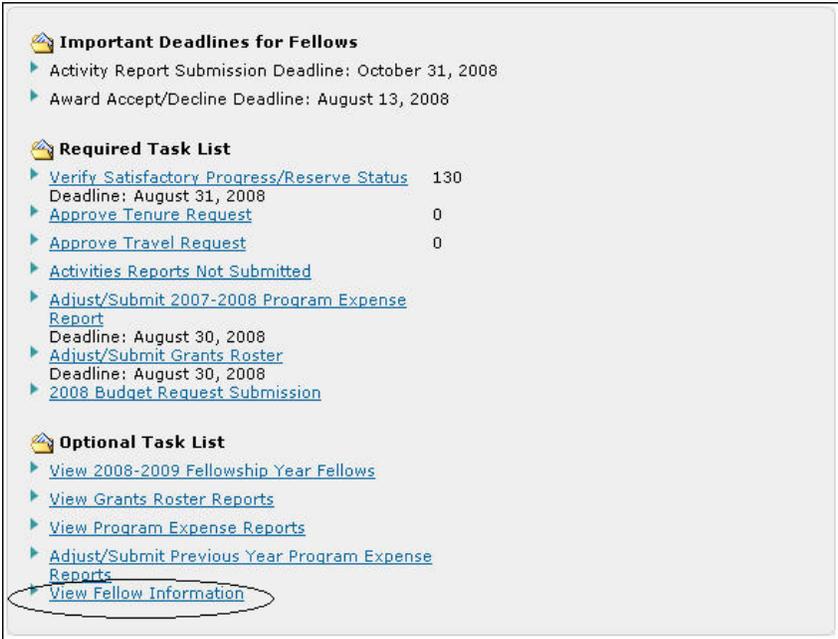


Figure 65: View Fellow Information Link

To View Fellow Information:

1. Select the View Fellow Information link from your task list.

A list of all fellows at your organization is displayed, including the fellow’s name, fellow id, field of study, fellow status, tenure status, and the year they were awarded. You may sort this list by selecting the column heading of any of the columns to sort the list by that column. A search box is also available in this screen if you wish to search for a specific fellow.

Fellow Information | MAIN

Search for existing Fellow by Fellow ID:
FellowID: Search

Search for existing Fellow by Name:
Last Name:
First Name: Search

419 items found, displaying 106 to 120 [Prev] 8, 9, 10, 11, 12, 13, 14, 15 [Next]

Fellow ID	Fellow Name	Organization	Field of Study	Current Fellow Status	Current Tenure Status	Year Awarded	Action
TESTJ00026	jtest26, Fellow	University of Florida	Engineering - Computer Engineering	Active	On Tenure	2004	View
TESTJ00027	jtest27, Fellow	University of Florida	Engineering - Computer Engineering	Active	On Tenure	2004	View
TESTJ00028	jtest28, Fellow	University of Florida	Engineering - Computer Engineering	Active	On Tenure	2004	View
TESTJ00029	jtest29, Fellow	University of Florida	Engineering - Computer Engineering	Active	On Reserve	2003	View
TESTJ00030	jtest30, Fellow	University of Florida	Engineering - Computer Engineering	Active	On Tenure	2004	View

Figure 66: List of Fellows

To Search for a Specific Fellow:

1. Enter a fellow id, fellow last name, and/or fellow first name.
2. Click the Search button.

The matching results are displayed.

🔍 Search for existing Fellow by Fellow ID:

FellowID:

🔍 Search for existing Fellow by Name:

Last Name:
First Name:

419 items found, displaying 106 to 120 [Prev] 8, 9, 10, 11, 12, 13, 14, 15 [Next]

Fellow ID	Fellow Name	Organization	Field of Study	Current Fellow Status	Current Tenure Status	Year Awarded	Action
TESTJ00026	jtest26, Fellow	University of Florida	Engineering - Computer Engineering	Active	On Tenure	2004	View
TESTJ00027	jtest27, Fellow	University of Florida	Engineering - Computer Engineering	Active	On Tenure	2004	View
TESTJ00028	jtest28, Fellow	University of Florida	Engineering - Computer Engineering	Active	On Tenure	2004	View
TESTJ00029	jtest29, Fellow	University of Florida	Engineering - Computer Engineering	Active	On Reserve	2003	View

Figure 67: Search Box and Matching Results List

3. Select a fellow to view by selecting the View link next to the fellow’s record.

The fellow’s record is displayed. There are four tabs of information available for you to view: Profile, Tenure Details, Tenure Changes, and Travel Requests. The fellow’s profile is the tab that will be displayed when you first select to view the fellow’s record.

Fellow Information | MAIN ▶
Fellow etest8 - TESTE00008

Profile | Tenure Details | Activities Reports

User Name

First Name: Fellow
Last Name: etest8
Middle Name:
Previous Last Name 1:
Previous Last Name 2:
Prefix: Mr
Suffix: Jr
System Username: etest8

Figure 68: Fellow Profile Screen

4. Select the Tenure Details tab to view the fellow’s tenure records.

The fellow’s tenure records are displayed. You may sort the list by selecting the column header for the column by which you wish to sort.

Fellow Information | MAIN ▶
Fellow jtest26 - TESTJ00026

Profile | **Tenure Details** | Tenure Changes | Travel Requests

Tenure Records

2 items found, displaying 1 to 2 1

Tenure Year	Organization	Abroad?	Field of Study	Tenure Status	Tenure Year Start	Tenure Months Used	Reserve Months Used	Forfeit Months Used	Stipend Used	COE Used	Travel Used	Action
2004	University of Florida	N	Engineering - Computer Engineering	On Tenure	Fall	12	0	0	\$30,000.00	\$10,500.00	\$0.00	View
2005	University of Florida	N	Engineering - Computer Engineering	On Tenure	Fall	12	0	0	\$30,000.00	\$10,500.00	\$0.00	View

Figure 69: Fellow Tenure Records Screen and View Link

5. Select the View link next to the tenure record for which you wish to view details.

The tenure details for the tenure you record you selected are displayed. There are sections for the school information, tenure information, cost information, and update information.

Fellow Information | MAIN ▶
Fellow jtest26 - TESTJ00026

Profile Tenure Details Tenure Changes Travel Requests

Tenure Year 2004 Details

School Information

Organization: University of Florida
Field Of Study: Engineering - Computer Engineering
Abroad: No

Tenure Information

Tenure Status: On Tenure
Status Effective Date: 09/01/2004
Tenure Year Start: Fall
End Month: August
Months On Tenure: 12
Months On Reserve: 0
Months On Forfeit: 0
Reserve Verified: No
Satisfactory Rating: Not Rated

Cost Information

Stipend Used: \$30000.00
COE Used: \$10500.00
Travel Amount Used: \$0.00
Other: \$
Other Description:

Figure 70: Tenure Record Details Screen

NOTE: The fellow’s tenure details will reflect the last approved status, whether the request is to occur immediately or occur in the future. If it is a tenure change request that has been approved to occur immediately, it will be reflected as such in the Current Fellow Status. If it is a tenure change request that has been approved to happen in the future (ex. The fellow is currently on tenure as of November but as of January they will be on reserve), the tenure details will reflect that they are on reserve (the last approved status), while the Current Fellow Status will reflect that they are on tenure (current status).

- 6. Select the Tenure Changes tab to view previous tenure change requests the fellow has submitted.

The list of tenure changes the fellow has previously requested or which are currently pending is displayed. The list includes the tenure year the change was for, the request date, the fellow’s organization, and the request status. You may sort the list by selecting the column heading of the column by which you wish to sort.

Fellow Information MAIN >				
Fellow atest28 - TESTA00028				
Profile	Tenure Details	Tenure Changes	Travel Requests	
1 item found. 1				
Tenure Year	Request Date	Organization	Request Status	Action
2003	07/28/2004	University of Texas at Austin	Pending	View

Figure 71: List of Tenure Change Requests Screen

- 7. Select the View link next to the tenure change for which you wish to view details.

The request details are displayed, including a request summary, change information, the reason for the request, cost information, and update information.

Fellow Information MAIN >			
Fellow atest28 - TESTA00028			
Profile	Tenure Details	Tenure Changes	Travel Requests
Tenure Changes Details			
Request Summary			
Tenure Year: 2003			
Request Date: 07/28/2004			
Request Status: Pending			
Change Information			
New Organization: Auburn University			
New Field of Study:			
New Tenure Status:			
Effective Date: 08/19/2004			
Reason for Request			
Reason For Request: Test Reason			
Cost Information			
Stipend Used: \$ 2000.00			
COE Used: \$ 1000.00			

Figure 72: Tenure Change Request Details Screen

- 8. Select the Travel Requests tab to view previous travel allowance requests the fellow has submitted.

The list of travel requests the fellow has previously submitted or which are pending is displayed. The list includes the tenure year the request was submitted for, the request date, the fellow’s organization, and the request status. You may sort the list by selecting the column heading of the column by which you wish to sort.

Fellow Information | MAIN >
Fellow jtest10 - TESTJ00010

Profile | Tenure Details | Tenure Changes | **Travel Requests**

1 item found. 1

Tenure Year	Request Date	Institution	Request Status	Action
2003	11/19/2003	University of Florida	approved	View

Figure 73: List of Travel Requests Screen

9. Select the View link next to the travel request for which you wish to view details.

The request details are displayed, including a request summary, change information, the departure information, the return information, the reason for the request, and update information.

Fellow Information | MAIN >
Fellow jtest10 - TESTJ00010

Profile | Tenure Details | Tenure Changes | **Travel Requests**

Travel Requests Details

Request Summary

Tenure Year: 2003
Request Date: 11/19/2003
Request Status: approved

Departure Information

Date: 11/27/2003
City: Washington
State: DC
Country: US

Return Information

Date: 03/06/2004
City: Rome
State:
Country: IT

Reason for Request

Reason For Request: This is example reason for a travel allowance request. It should include a fellow's travel plans as well as the foreign sites they will be traveling to in order to conduct their research.

Update Information

Figure 74: Travel Request Details Screen