



Quick Reference Guide

Recent GRFP System enhancements (Release date July 31, 2008)

The GRFP system has been enhanced to provide further functionality for Coordinating Officials. The new enhancements will:

- Provide the ability for Coordinating Officials (CO) to view a Financial Summary with Award information, financial expenditure total as recorded in the NSF Financial Accounting System, and summaries of past program expense reports. This information will be used in preparing your budget request for the upcoming Fellowship Year.
- Provide enhanced ability for Coordinating Officials (CO) to Adjust fellow records in the Program Expense Reports*.
- Display Open and Deadline dates for important tasks in the CO task menu.

* **Note:** The annual **Expenditure Report** has been renamed **Program Expense Report**



Changes to the CO Task Menu

New options are available to Coordinating Officials in both the **Task** and **Optional Task** lists:

Important Deadlines for Fellows 1

- 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 2
- Approve Tenure Request 0
- Approve Travel Request 0
- Activities Reports Not Submitted
- Adjust/Submit 2007-2008 Program Expense Report 3
Deadline: August 30, 2008
- Adjust/Submit Grants Roster 5
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 4
- View Fellow Information

- GRFP COs can now view upcoming **Important Deadlines** for their GRFP Fellows.
- Reports that have specific windows for submission now display **Deadline** and **Open** dates to allow for greater visibility in planning.
- GRFP COs can now adjust/submit their most current year's **Program Expense Report** from their **Required Task List**.
- Program Expense Reports** for previous years can be adjusted and submitted from the **Optional Task List**.
- GRFP COs can now access their Grants Roster report from the **Adjust/Submit Grants Roster** link or the **Budget Request Submission** link.

Adjusting Fellow Records in Expense Report

The ability to adjust fellow records from the Program Expense report has been expanded to allow adjustment of fellowship status and months.

To select a Fellow's record from the Program Expense Report, select **Adjust** next to the Fellow whose record you wish to change.

1 *Current Fellowship Status: On Reserve

Months on Tenure:

Months on Reserve:

Months on Forfeit:

Months Unaccounted For: 2

1. You may change the **Fellow's current Tenure Status, Tenure Months, Reserve Months and Forfeit Months**

2. You must select **Calculate** to auto calculate the **Stipend** and **COE** amounts based on Tenure months.

Fellowship Year Status: On Reserve

3 Adjusted Stipend:

Adjusted COE:

Adjusted Travel:

Adjusted Other:

3. You may adjust Stipend and COE amounts (up to maximums). Any variances will require an explanation in the **Comments** section.

- Changes will be reflected in the Fellow's record when the **Expense Report** is approved by NSF.
- Records that have been adjusted will display a **Y** in the Adj column on the Expense Report and any comments entered will be displayed.
- To view the **Expense Report** without any adjustments, select **View Program Expense Report without All Adjustments**



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Reviewing Your Financial Summary

You may now review a Financial Summary for your Organization's GRFP award prior to submitting your Grants Roster for the upcoming Fellowship Year. The Financial Summary summarizes the balance of your Organization's current GRF Award as well as the cumulative fellowship expenses recorded related to 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 funding ceiling that NSF will budget to your organization for the upcoming Fellowship Year.

To access your Financial Summary, select **Review Financial Summary and Submit Grants Roster** on your Grants Roster screen

1 Current Primary Award ID:	0757737	Financial Summary Help
2 Award Effective Date:	10/01/2007	
3 Award Expiration Date:	09/30/2012	
4 Cumulative Award Amount:	\$81,000.00	View History 5
6 Carryover from Other Award(s):	\$1,500,000.00	View Other Awards 7 Carryover Explanation:
8 Total Amount Available:	\$1,581,000.00	
	9 Program Level Expenses	10 Institution Level Drawdowns FFR Submitted as recorded in NSF FAS
	\$9,112,500.00 View	\$42,240.00
		11 Variance
		\$9,070,260.00
12 Annual Surplus/(Deficit):	(\$7,531,500.00)	\$1,538,760.00
13 Projected Grants Roster Expenses:	\$283,500.00 Edit	
14 Maximum Budget Request: (Projected Grants Roster Expenses +/- Surplus or Deficit from Program Level Expenses stated above)	\$7,815,000.00	15 Temp Prop ID: <input type="text"/>
Comments (to be displayed as a portion of budget justification): (Must be less than 800 characters.)	<input type="text"/>	

- 1. Current Primary Award ID:** The NSF Award ID of your Organization's most current Award as determined by NSF.
- 2. Award Effective Date:** The effective date of your Current Primary Award.
- 3. Award Expiration Date:** The expiration date of your Current Primary Award.
- 4. Cumulative Award Amount:** Cumulative amount issued by NSF to date to your Organization under your Current Primary Award.
- 5. View History:** Displays a history of the amounts (referred to as amendments) issued under the Current Primary Award.
- 6. Carryover from Other Award(s):** Amount carried over from previous/other Award into the Current Primary Award. This amount is determined by the GRF Program Office in conjunction with your organization's Coordinating Official.

- 7. View other Awards:** Displays a summary of other active GRFP Awards for an Organization including recorded amounts awarded and draw downs.
- 8. Total Amount Available:** Sum of the Cumulative Award Amount (**4**) and the Carryover from Other Award(s) (**6**).
- 9. Program Level Expenses:** Fellowship expenses as reported by the Organization through the GRFP System. Program Level Expenses are cumulative during the award life of your Current Primary Award. If your Organization has not submitted Program Expense Reports during this period, this figure will not be accurate and the reports should be submitted for the missing years to ensure an accurate budget accounting.
- 10. Institution Level Drawdowns:** Financial expenditures as recorded against the Current Primary Award and submitted via the FastLane/Financial Functions.
- 11. Variance:** The difference between the Program Level reported expenses and the FFR/FCTR NSF recorded expenses. This variance likely exists due to the fact that FFR/FCTR expenses and Program Level Expenses have different submission cycles.
- 12. Annual Surplus/(Deficit):** The difference between the Total Amount Available (**8**) and the cumulative Program Level Expenses (**9**). This figure represents the surplus or deficit balance currently available on your current GRFP award.
- 13. Projected Grants Roster Expenses:** Projected expenses for the upcoming fellowship year as reported on your Organization's Grants Roster Report.
- 14. Maximum Budget Request:** The calculated amount your Organization is projected to need to cover your Grants Roster funding projections for the upcoming fellowship year. Calculated by subtracting any surplus or adding any deficit (**12**) (as calculated above) from the projected Grants Roster Expenses (**13**).
- 15. Temp Prop ID:** If your Organization has been notified that it should submit a FastLane proposal for the upcoming year, you may enter the Temp Prop ID as assigned by the FastLane/Proposals, Awards and Status . This ID will be used to track and monitor GRF funding actions in the NSF GRF office.



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Recent GRFP system enhancements (Release date May 19, 2008):

New Coordinating Officials functionality.

- ▶ Combine the functions available to Coordinating and Financial Officials. Former Financial Officials will merge with Alternate Coordinating Officials.
- ▶ Provide ability for Coordinating Officials (CO) to Adjust and Submit Expenditure Reports.
- ▶ Make Grants Rosters available for Coordinating Officials to Adjust and Submit for the upcoming Fellowship Year.
- ▶ Allow CO at New Organization to approve Tenure Change Request when an Organization change is requested by a Fellow.

New Options Available for GRFP

New options are available to Coordinating Officials in both the **Task** and **Optional Task** lists:

Task List

- ▶ [Approve Tenure Request](#) 1
- ▶ [Approve Travel Request](#) 0
- ▶ [Activities Reports Not Submitted](#)
- ▶ [Adjust/Submit Expenditure Report](#) **1**
- ▶ [2008 Budget Request Submission](#) **2**

Optional Task List

- ▶ [View 2007-2008 Fellowship Year Fellows](#) **3**
- ▶ [View Grants Roster Reports](#) **4**
- ▶ [View Expenditure Reports](#)
- ▶ [View Fellow Information](#)

- GRFP COs can now **Adjust and Submit Expenditure Reports** for their Organizations.
- The **Budget Request Submission** link provides a way for you to adjust and submit Grants Roster Reports for the upcoming fellowship year to NSF for Approval.
- The **Fellowship Year Fellows** Report allows you to view a list of all fellows affiliated with your organization for the current Fellowship Year.
- Due to the **Grants Roster Report process change**, users will only be able to access Grants Roster Reports beginning with the 2008-2009 Fellowship Year. To view data on previous years, users should access **Expenditure Reports**.

Accessing Your Grants Roster Report

The **Grants Roster Report** is an annual report that details the projected amount of money that your institution plans to budget for the upcoming Fellowship year. Prior to each Fellowship year, you should review the report, make any adjustments that are needed, and submit the report to NSF.

To Access your **Grants Roster Report**:

- Select the **Budget Request Submission** link from the Task List.

Task List

- ▶ [Approve Tenure Request](#) 1
- ▶ [Approve Travel Request](#) 0
- ▶ [Activities Reports Not Submitted](#)
- ▶ [Adjust/Submit Expenditure Report](#)
- ▶ [2008 Budget Request Submission](#) **1**

- Select the action link next to the **Adjust/Submit Grants Roster Report** activity to open the report.

OVERALL STATUS			
ACTIVITY	DESCRIPTION	STATUS	ACTION
Adjust/Submit Grants Roster Report (Required)	View summary of expenses against current Award and use balance to prepare budget request for next fellowship year.	Unsubmitted	Go 2

- If a report is pending NSF Approval, the report status will be **Submitted** and no action will be available to COs.
- If a report has been returned with adjustments by NSF, the report status will be **Rejected** and the available action will be **Edit Returned Report**.
- If a report has been approved by NSF, the report status will be **Approved** and the available action will be **Resubmit**.



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Adjusting and Submitting a Grants Roster Report

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

Fellow ID	Fellow Name	Tenure Months	Current Fellowship Status	Adj Y/N	Adj Comments	Fellowship Year Status	Field of Study	Stipend	COE	Travel	Total	Action
TESTG00025	gtest25, Fellow	0	On Reserve	Y	On reserve	On Reserve	Engineering - Computer Engineering	\$0.00	\$0.00	\$0.00	\$0.00	Adjust
TESTG00028	gtest28, Fellow	12	On Tenure	N		On Tenure	Engineering - Computer Engineering	\$30,000.00	\$10,500.00	\$0.00	\$40,500.00	Adjust
TESTG00024	gtest24, Fellow	12	On Tenure	N		On Tenure	Engineering - Computer Engineering	\$30,000.00	\$10,500.00	\$0.00	\$40,500.00	Adjust
TESTG00031	gtest31, Fellow	12	On Tenure	N		On Tenure	Engineering - Computer Engineering	\$15,000.00	\$10,500.00	\$0.00	\$25,500.00	Adjust
TESTG00034	gtest34, Fellow	6	On Tenure	N		On Tenure	Engineering - Computer Engineering	\$15,000.00	\$5,250.00	\$0.00	\$20,250.00	Adjust

Export options: [Excel](#)

[Fellows Not Yet Declared \(a new browser window will open\)](#)

Sub Total						
	# Of Fellows	Stipend	COE	Travel	Total	
Total Fellows on Tenure:	9	\$182,500.00	\$69,125.00	\$0.00	\$251,625.00	
Total Fellows on Reserve:	2	\$0.00	\$0.00	\$0.00	\$0.00	
Total Fellows in Other Fellowship Status:	134	\$0.00	\$0.00	\$0.00	\$0.00	
Total:	145	\$182,500.00	\$69,125.00	\$0.00	\$251,625.00	

General Comments: (Must be less than 900 characters.)

[View Grants Roster Report Without All Adjustments](#) [Save Report](#) [Submit Report](#) [Cancel](#)

1. To adjust a **Fellow Record**, select the link next to the appropriate Fellow.
2. You may change the **Fellow's Tenure Status, Tenure Months, Reserve Months and Forfeit Months**.
3. Select **Calculate**. This will auto calculate the **Stipend** and **COE** amounts based on Tenure months.
4. After completing steps 1 – 3, you may adjust Stipend and COE amounts (up to maximums). Any variances will require an explanation in the **Comments** section.
5. The **Fellowship Year** status also populates when selecting **Calculate**. Any Fellow with 1 month or greater on tenure will have a Fellowship Year status of **On Tenure**. This status is used for reporting purposes.
6. Select **Save** to save adjustments to record. Changes will be reflected in the Fellow's record when the **Grants Roster** is approved by NSF.

7. Records that have been adjusted will display a **Y** in the Adj column and any comments entered will be displayed.
8. Prior to the tenure declaration deadline, you may view a list of Fellows who were affiliated with your Organization for the previous year but have not yet declared for the upcoming year, by selecting the **Fellows Not Yet Declared** link.
9. To view the **Grants Roster Report** without any adjustments, select **View Grants Roster without All Adjustments**.
10. If you are not prepared to Submit your report, but would like to Save the changes made, select **Save Report**.
11. To submit the Report to NSF for approval select **Submit Report**.

1 item found.

Fellow ID	Fellow Name	Tenure Months	Current Fellowship Status	Fellowship Year Status	Field of Study	Stipend	COE	Travel	Total
TESTG00025	gtest25, Fellow	0	On Reserve	On Reserve	Engineering - Computer Engineering	\$0.00	\$0.00	\$0.00	\$0.00

* **Current Fellowship Status:** On Reserve

Months on Tenure:

Months on Reserve:

Months on Forfeit:

Months Unaccounted For:

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

Adjusted Stipend:

Adjusted COE:

Adjusted Travel:

Note: When NSF receives and reviews your Grants Roster report, they may either approve the report or return the report with adjustments. You will receive email notification if a report is returned with adjustments. You may access the report through the **Budget Request** submission link to review the return and make any adjustments. You will have the option to adjust any records and will need to **Resubmit** the report for approval.



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Tenure Change Request Approval Flows

The approval and notifications process varies depending on the type of **Tenure Change Request** submitted by a Fellow. Please refer to the chart below to determine when an approval is necessary. Any change requests requiring approval will appear in the **Coordinating Official Task List** under Approve Tenure Change.

Type of Tenure Change Request	Current Organization CO	Proposed Organization CO	GRF Program Office
Continuing Fellow @ Tenure Declaration:			
Field of Study or Tenure Status Change	✓	N/A	✓
Organization Change (can also include Field of Study or Tenure Status changes)		✓	✓
Awardee (New Fellow) @ Tenure Declaration:			
Field of Study or Tenure Status Change		N/A	✓
Organization Change (can also include Field of Study or Tenure Status changes)	N/A		✓
Mid-Year Tenure Change Requests:			
Field of Study or Tenure Status Change	✓	N/A	✓
Organization Change (can also include Field of Study or Tenure Status changes)	✓	✓	✓
Key: ✓ - Approval is Required (email is also sent notifying party of change)			
- Email sent, no approval required			