Contents

Introduction

To conduct financial activities with NSF, you must be assigned Financial Functions User (FFU) permissions through FastLane. FFU permissions are assigned by your organization's Financial Administrator. Once you are an FFU, you can use the Award Cash Management Service to:

1. Request Payments for NSF awards.
2. View award and organization payment history and financial information.

How to Become a Financial Function User (FFU)

Before you can access the FastLane financial functions, you must become an FFU; this involves three steps:

1. A **Sponsored Project Office (SPO)** representative in your organization—with permissions to add, modify, and delete users and to initialize/change passwords—gives an individual in your organization the **Financial Administrator** permission. The Financial Administrator is usually a member of your organization's Finance Office, such as the Controller or Deputy Controller. (If necessary, the SPO can also be the Financial Administrator.)

2. The **Financial Administrator** gives permissions to one or more of your organization's authorized FastLane users to perform financial functions. An individual performing these functions is an **FFU**. (If necessary, the Financial Administrator can also be an FFU).

3. The **FFU** conducts financial functions with NSF on behalf of your organization.

The table below summarizes the roles of the FastLane Contact, the Financial Administrator, and the FFU.

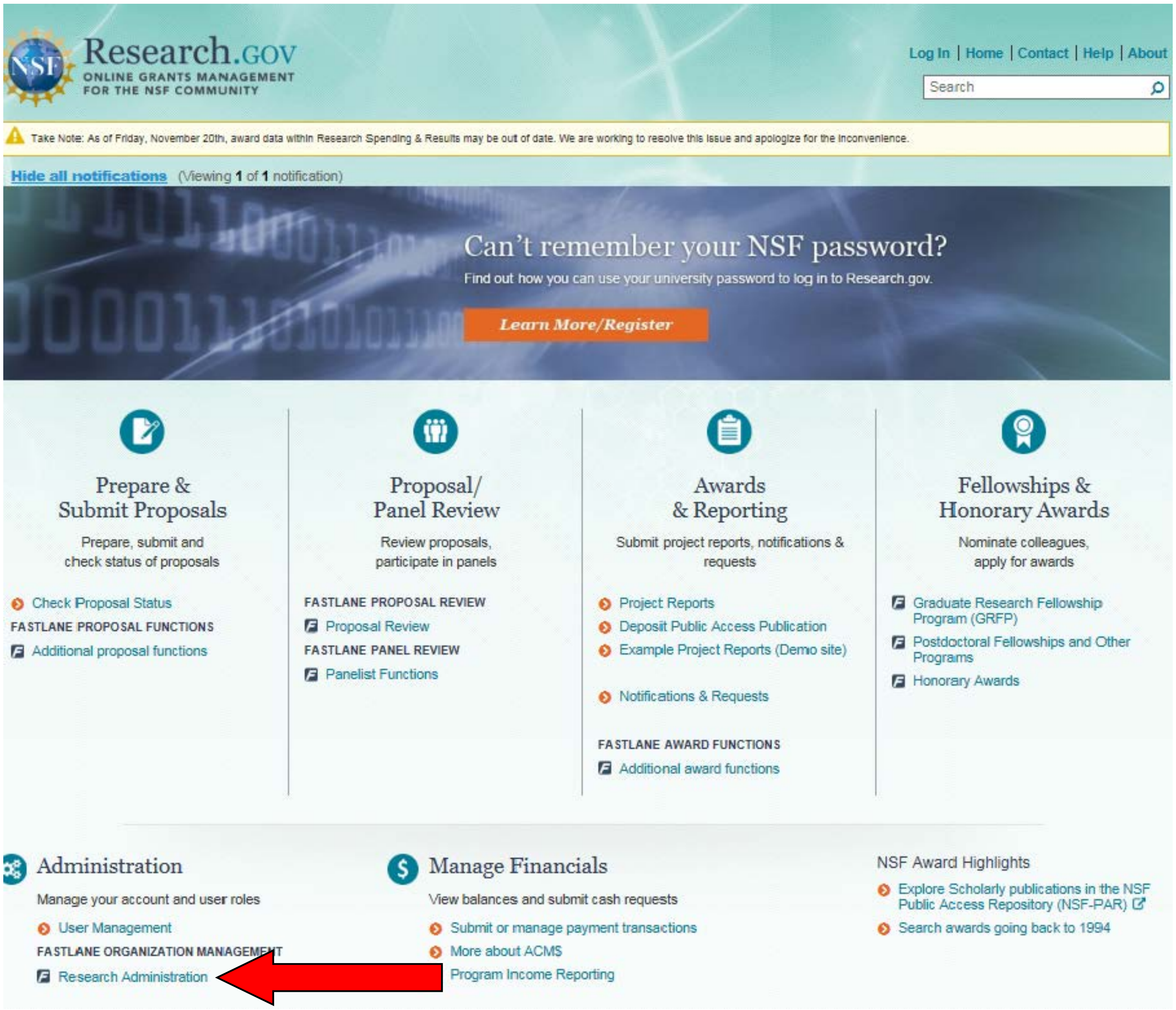
Who	Where to Log On in FastLane	Role
FastLane Contact/SPO: the person in your organization who has all FastLane Research Administration permissions.	Research Administration	• Add, modify & delete • Designates the Financial Administrator- can designate self as Financial Administrator, if necessary. • Authorizes individuals as FastLane users to whom the Financial Administrator can assign permissions for financial functions. • Set and reset passwords. • Withdraw authorization from the Financial Administrator.
Financial Administrator: individual in your organization, usually from the Finance or Business Office, such as, the Controller or Deputy Controller	Research Administration	• Assigns financial function permissions to one or more individuals. • Withdraws permissions to perform financial functions. • Grants permissions to perform financial functions to self. • *Cannot reset passwords*
Financial Functions User: one or more individuals who have permission to carry out one or more financial functions	Financial Functions	• Can perform financial functions as authorized by Financial Administrator: o ACM$ Awardee Preparer o ACM$ Awardee Financial Representative o ACM$ Awardee Certifier

Assigning the Financial Administrator Role

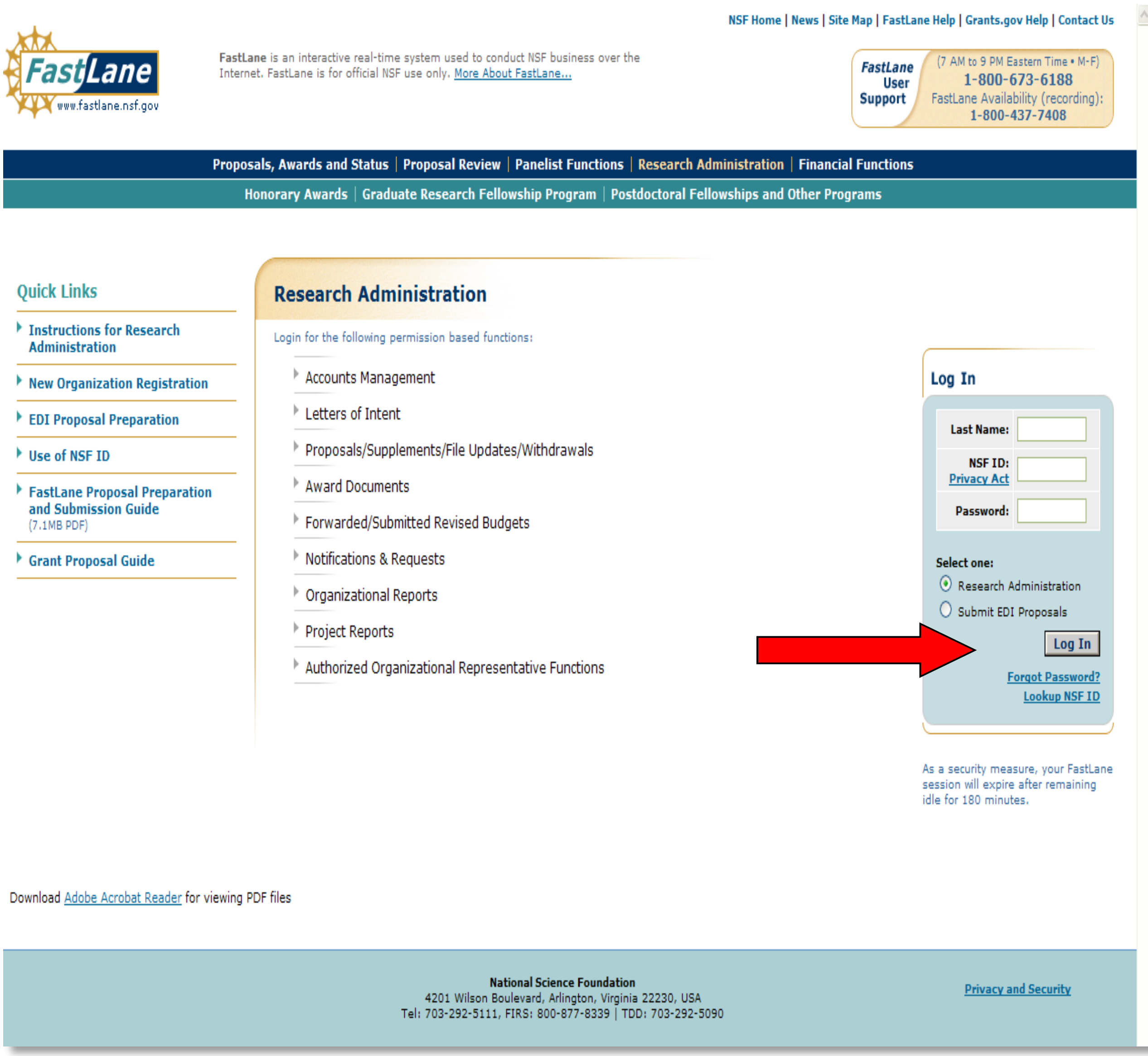
The SPO designates a Financial Administrator by giving an individual the Financial Administrator permission in the Accounts Management application of Research Administration. The SPO can do this in two ways: **1. Add a new User**, and **2. Modify a User Profile.**

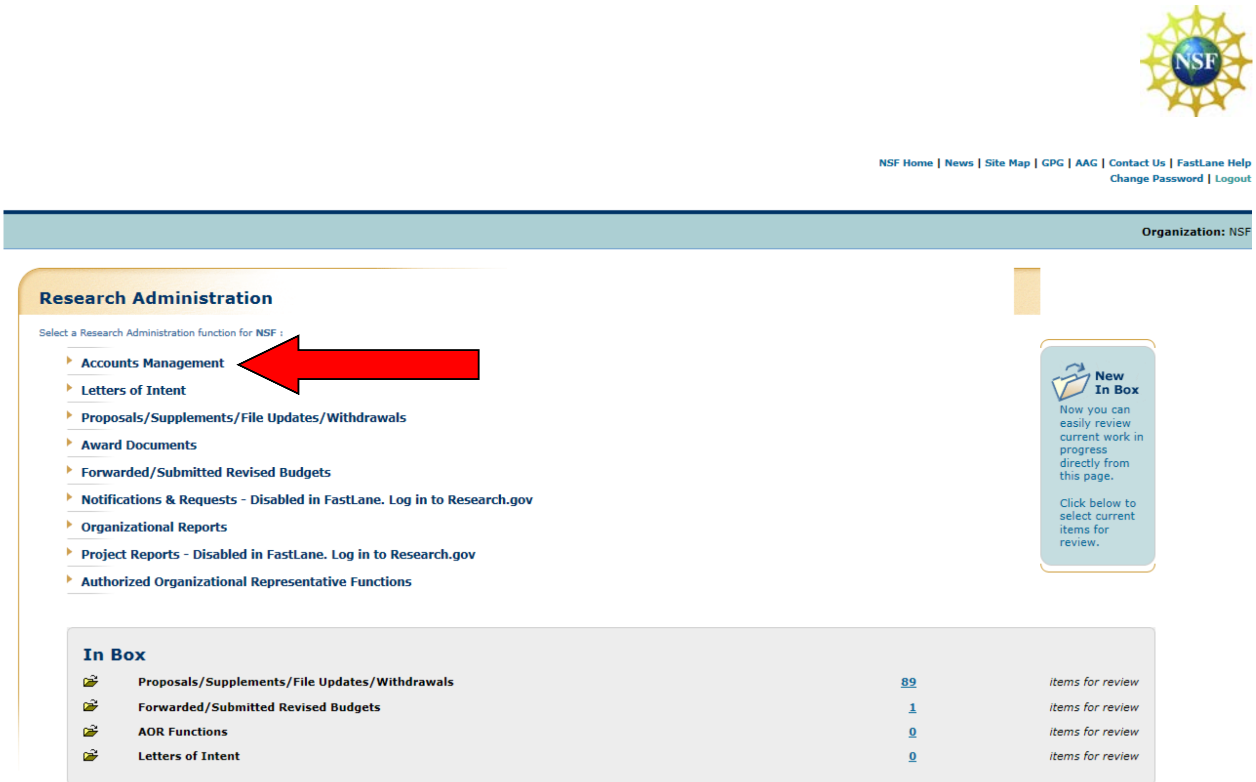
Add New User

Go to *Research.gov* and click on the **Research Administration** link at the bottom of the screen as shown below:

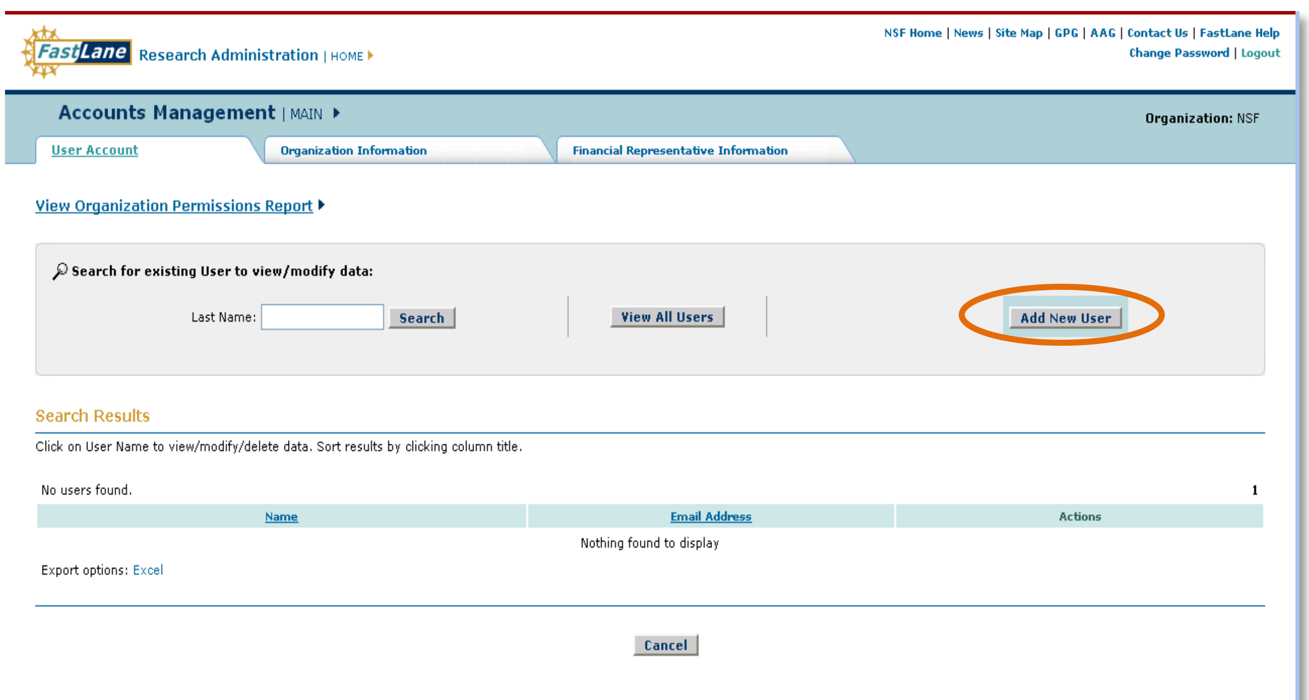


1. On the **Research Administration** screen, log in, then click on **Accounts Management**. The **Accounts Management** screen will display the **User Account** tab by default.


NSF Home | News | Site Map | FastLane Help | Grants.gov Help | Contact Us
FastLane
www.fastlane.nsf.gov
FastLane is an interactive real-time system used to conduct NSF business over the Internet. FastLane is for official NSF use only. More About FastLane...
FastLane User Support
(7 AM to 9 PM Eastern Time • M-F)
1-800-673-6188
FastLane Availability (recording):
1-800-437-7408
Proposals, Awards and Status | Proposal Review | Panelist Functions | Research Administration | Financial Functions
Honorary Awards | Graduate Research Fellowship Program | Postdoctoral Fellowships and Other Programs
Quick Links
Instructions for Research Administration
New Organization Registration
EDI Proposal Preparation
Use of NSF ID
FastLane Proposal Preparation and Submission Guide
(7.1MB PDF)
Grant Proposal Guide
Research Administration
Login for the following permission based functions:
Accounts Management
Letters of Intent
Proposals/Supplements/File Updates/Withdrawals
Award Documents
Forwarded/Submitted Revised Budgets
Notifications & Requests
Organizational Reports
Project Reports
Authorized Organizational Representative Functions
Log In
Last Name:
NSF ID:
Privacy Act
Password:
Select one:
Research Administration
Submit EDI Proposals
Log In
Forgot Password?
Lookup NSF ID
As a security measure, your FastLane session will expire after remaining idle for 180 minutes.
Download Adobe Acrobat Reader for viewing PDF files
National Science Foundation
4201 Wilson Boulevard, Arlington, Virginia 22230, USA
Tel: 703-292-5111, FIRS: 800-877-8339 | TDD: 703-292-5090
Privacy and Security



2. Click the **Add New User** button and the *Add New User* screen will display.



3. In the *User Profile* section, leave the *NSF ID* box blank. NSF will generate an NSF ID for the new user. The following fields must be completed:
   - First Name box (user's first name)

- Last Name box (user's last name)
- Email box (user's email)
- Phone Number box (user's direct line-optional entry)
- Fax Number box (user's fax number-optional entry)

In the *Create a Password* box, create and confirm a password for the new user:

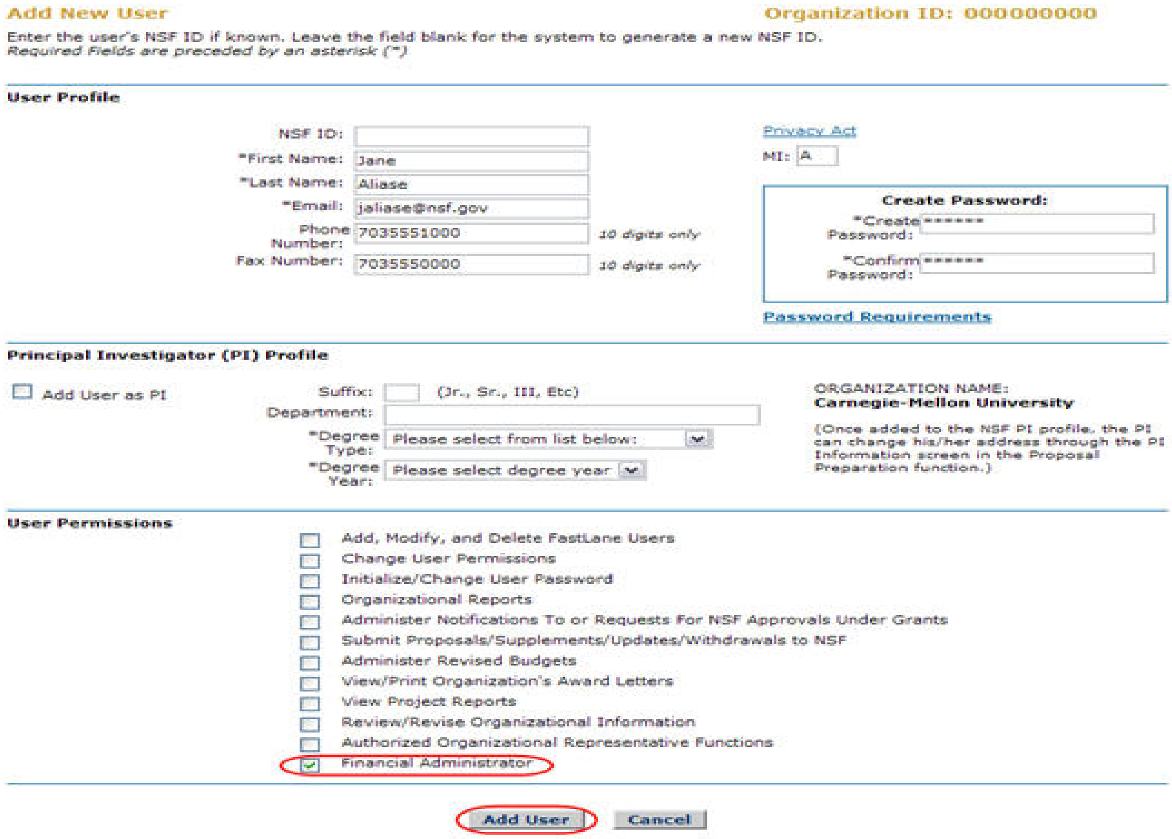
Note: If the new user is a **Principal Investigator (PI)**, complete the *Principal Investigator (PI) Profile* section and click the **Add user as PI** check mark box.

- Type any suffix for the user (PI)
- Specify a department from the *Department* drop-down list (optional entry)
- Specify a degree type from the *Degree* drop-down list
    - Select appropriate degree year

4. Click the *check mark* box for Financial Administrator within the *User Permissions* section.

5. Click the **Add User** button – the *View Add User Profile* screen will display showing all profile information and permissions of the new user.

User Profile screen

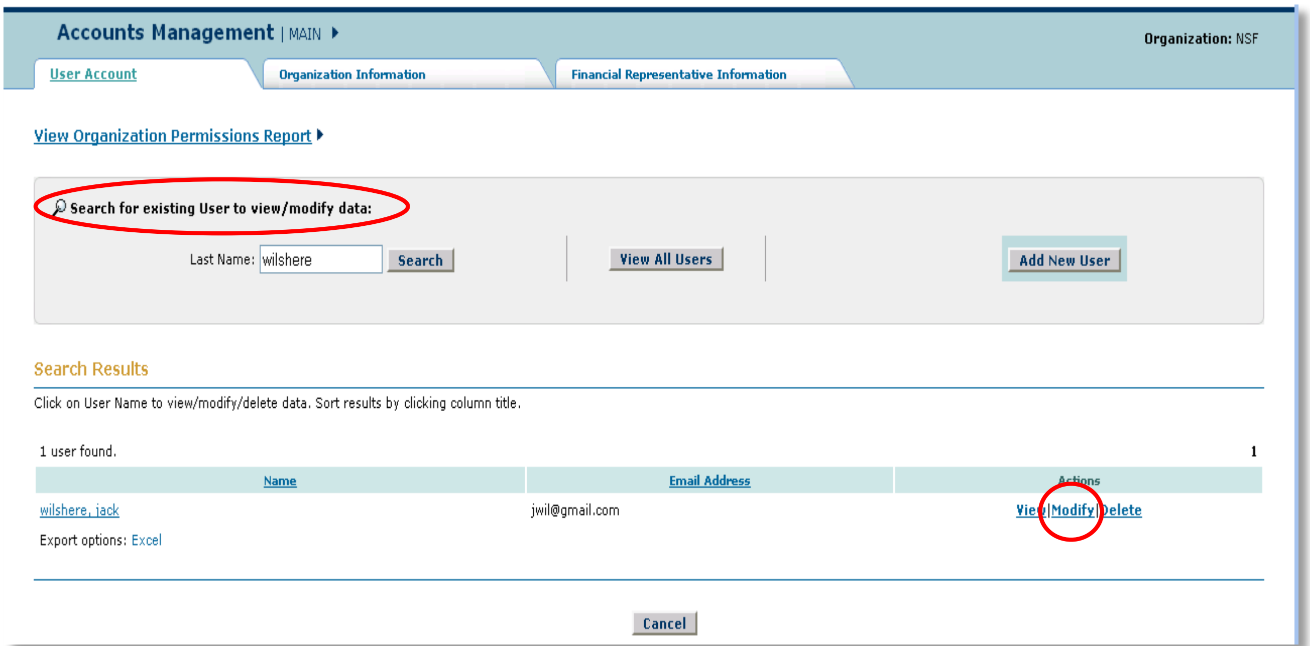


6. Click the **Confirm Add User** button –NSF ID displays on notification.

Modify a User Profile

1. Go to the FastLane home page and click on **Research Administration**. The Research Administration home page displays with a listing of functions. Login using your last name, NSF ID number, and password.

2. On the **Research Administration** screen, click **Accounts Management**. The **Accounts Management** screen will display with the **User Account** tab as default.
3. Search for the User whose profile you need to modify.
4. On the **Accounts Management** screen, click **Modify** on the row for the user whose profile you want to modify.



5. The **Modify User Profile** screen displays showing the individual's permissions.
6. In the **User Permissions** section, click the check mark box for Financial Administrator.
7. Click the **Modify User** button, and the **View Modify User Profile** screen will display.
8. Click the **Confirm Changes** button and the **Confirmation** screen will display.
9. Click **Account Management Main,** and the **Accounts Management Main** screen will again be displayed with the **User Account** tab as default.

The SPO Representative has now completed the required steps. The Financial Administrator must follow step two below to complete the financial setup.

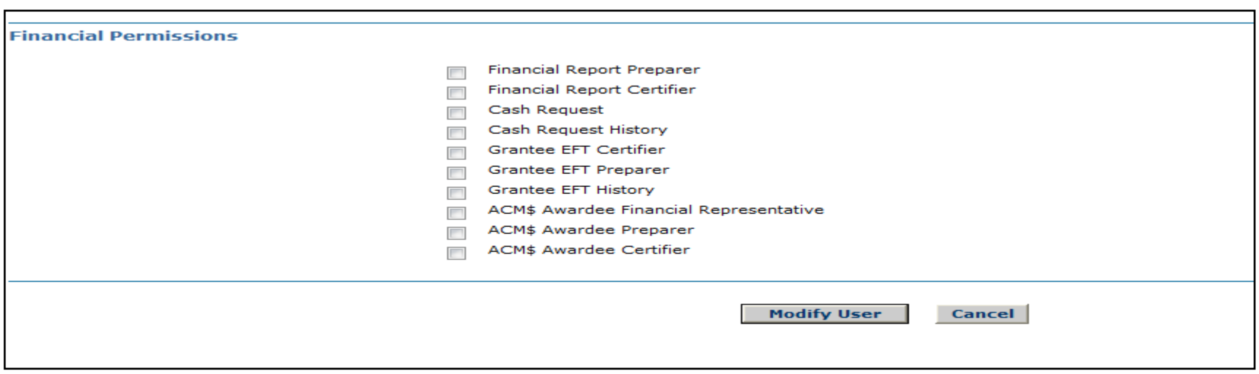
Assigning the Financial Function User Roles

The Financial Administrator gives permissions to one or more of your organization's authorized users to perform Financial Functions. The Financial Administrator is the only user who can assign permissions for Financial Functions to an individual in your organization. If the individual is not yet a user, have the SPO or another individual with Add, Modify, and Delete User permissions add the person as a user by completing the processes for **Add a New User** under Step 1 above.

To assign Financial Function permissions to an existing user:

1. Go to the FastLane home page and click on **Research Administration**. The Research Administration home page displays with a list of functions. Login using your NSF ID, last name and password.
2. Click on **Accounts Management**. The User Account tab screen displays as default.
3. On the User Account tab screen, search for the user you want to designate as a Financial Functions User (FFU).
    a. On the **Accounts Management** screen on the **User Account** tab, click **Modify** on the row for the user you want to make an FFU. The **Modify User Profile** screen will display.
    b. In the **Financial Permissions** section, click the check mark box for any number or all of the financial permissions shown in the screen below. Institutions should have at least one user with the following financial permissions:

        - ACM$ Awardee Preparer
        - ACM$ Awardee Certifier
        - ACM$ Awardee Financial Representative

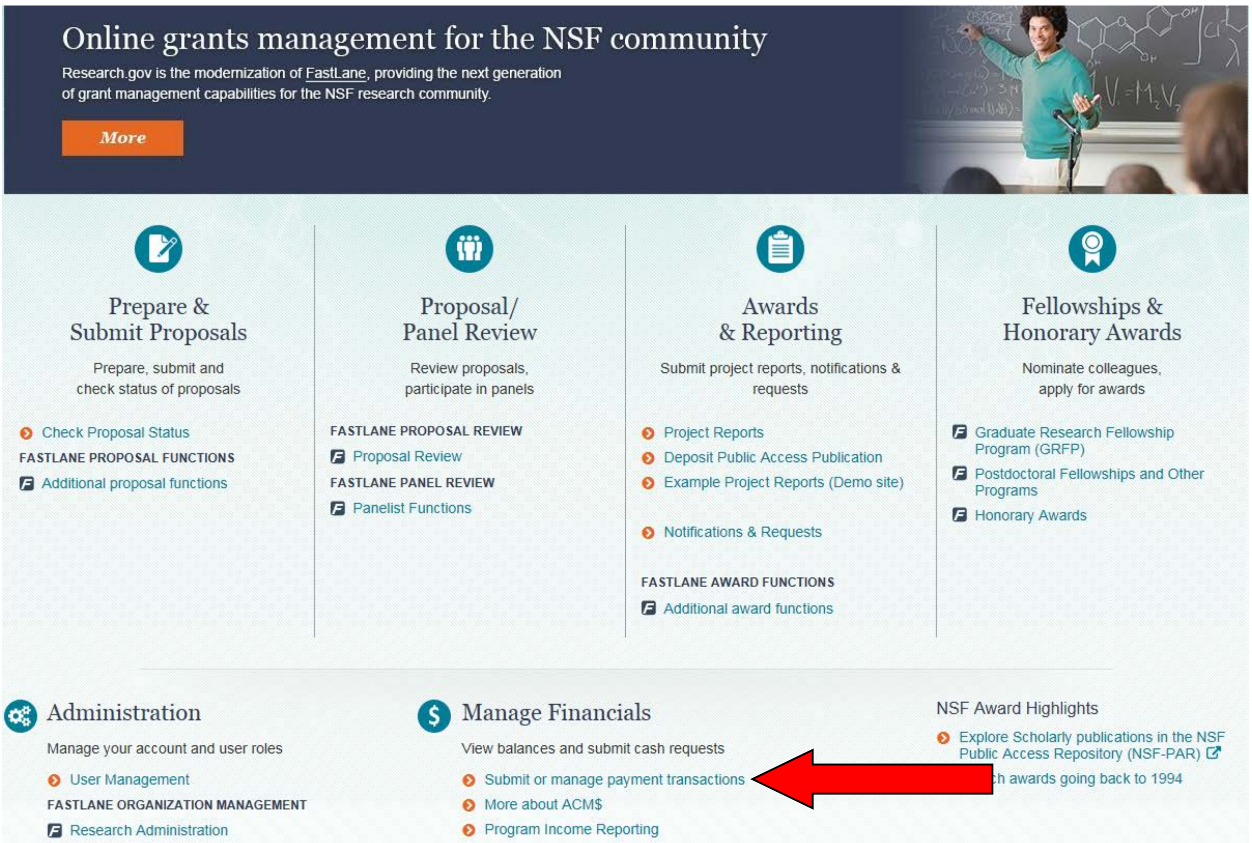


A single user can act as the preparer and certifier simultaneously. *As mentioned, all permissions will be assigned by the Financial Administrator*

Logging In to Research.gov

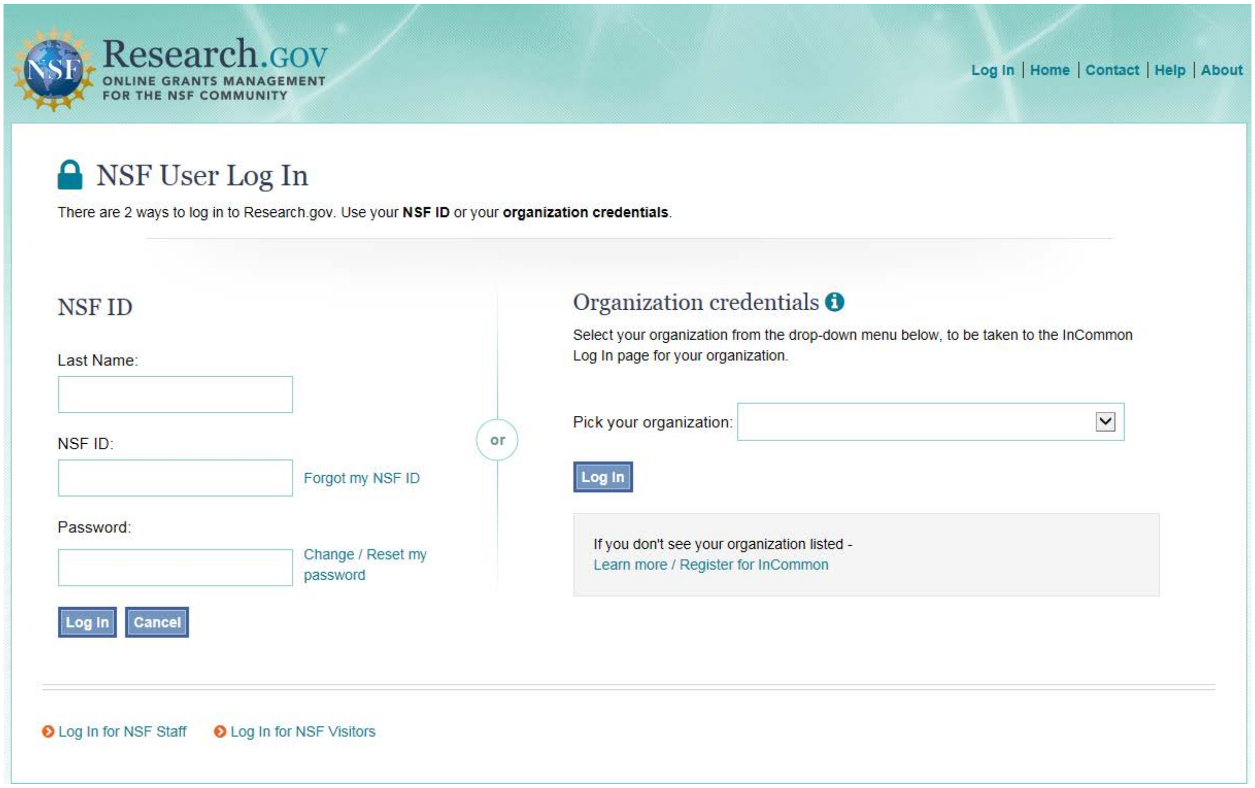
If you have been added as a new user and given financial permissions. You can now perform those financial functions for which you have permission.

1. Go to the **Research.gov** home page, click on “Submit or manage payment transactions.” The Research.gov Log-in screen appears.

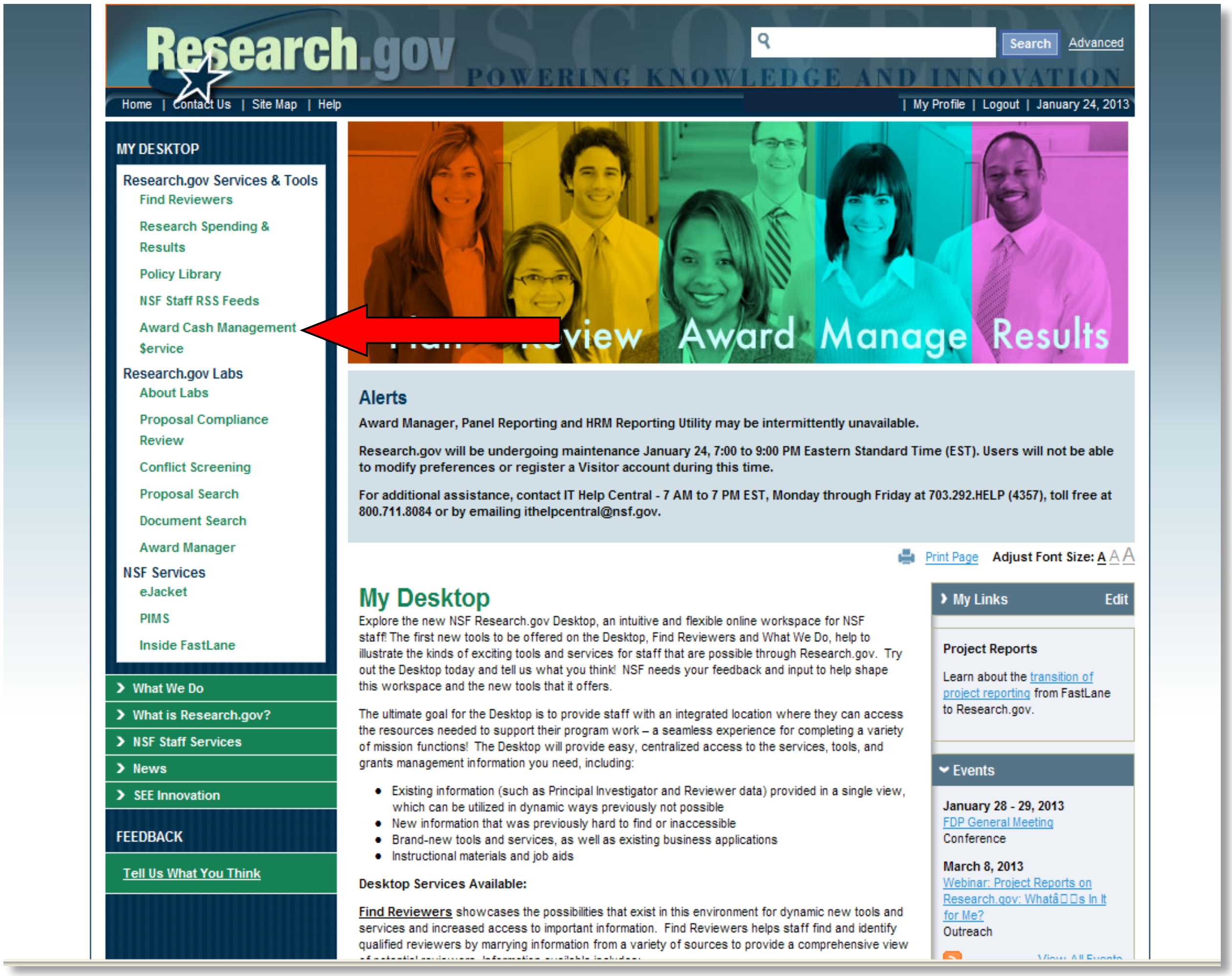


2. Enter your last name, NSF ID Number, and password.

    a. Click on **Log in**.
    b. You will see your Research.gov **My Desktop** page.



3. To access the ACM$ click on the **Award Cash Management Service** link under Research.gov Services & Tools or the **Award Cash Management Service** link under your ACM$ Dashboard.



How to Change the Banking (EFT) Information

NSF disburses funds to your organization's bank account on the basis of the banking information you have submitted to the System for Award Management SAM. Before you can request a payment transaction you insure your SAM registration, to include the banking information is active and up to date. The SAM user guide is at:

https://www.sam.gov/sam/SAM_Guide/SAM_User_Guide.htm

Award Cash Management $ervice

ACM$ is the financial service for award payments that requires the submission of award level payment amounts each time funds are requested. ACM$ is accessed through www.research.gov. ACM$ allows grantee institutions to submit cash requests and adjustments to open and closed awards, as well as access award level information on payments and award balances.

Use the links below to access ACM$ user information.

ACM$ Getting Started Guide *ACM$ Permissions Guide*