11b Letters of Intent for the SPO

Chapter 11b, Letters of Intent (LOIs) for the SPO, is to be used by a SPO only. PIs should use Chapter 11a.

The LOI provides a snapshot and concise summary about the goals of a forthcoming proposal project by the Sponsored Project Officer (SPO) in response to a solicitation from NSF. The following conditions apply for LOIs:

1. Program solicitations vary in their requirements. Regardless of the distinctions in LOI requirements, they are all successfully managed in FastLane. Distinctions in program solicitations include:

   a. Program solicitations may allow PIs to directly submit an LOI.

   b. Program solicitations may allow SPOs to create an LOI.

   c. Program solicitations may mandate LOIs requiring SPO approval.

2. More than one LOI can be created for a single program solicitation.

3. The SPO will be able to create a second LOI for a single solicitation, even if that particular solicitation allows for only one LOI to be submitted per SPO. However, a permissive warning message will appear and inform the SPO that he/she has already submitted a LOI for that particular solicitation.

4. LOIs cannot be created for program descriptions.

5. SPOs can Edit, Submit, View or Return LOIs forwarded to them by PIs. However, SPOs cannot delete LOIs forwarded to them from PIs. Only the originator of the LOIs (in this case, the PI) can delete.

6. SPOs can Create, Edit, Delete, and Submit LOIs they have created.

7. SPOs have access to view all LOIs within their organization. These include LOIs that PIs have submitted directly to NSF.

Access the LOI Module

To access the LOI Module, complete the following steps:

1. Login to FastLane and select Research Administration.

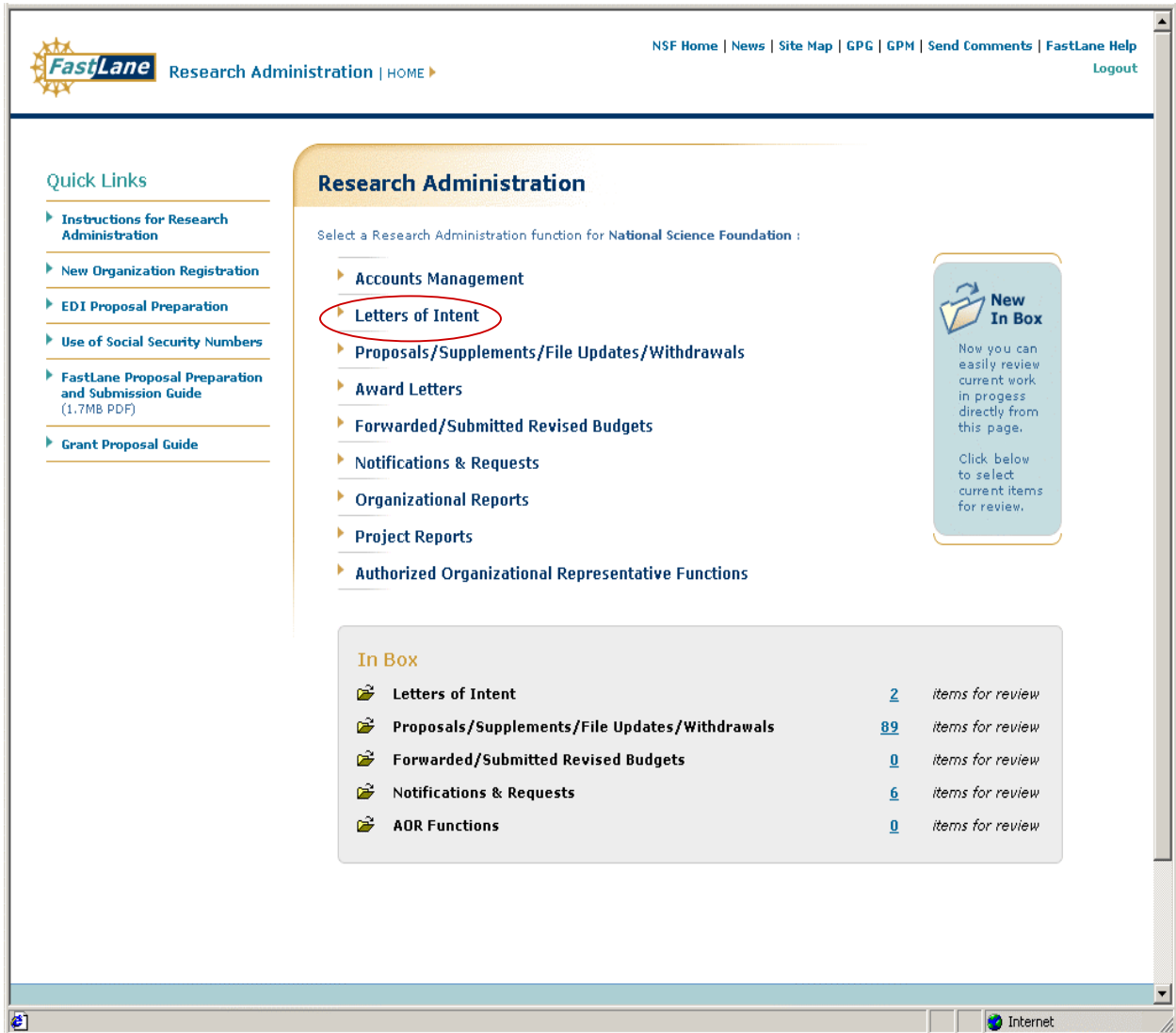2. The *Research Administration Page* (Figure 1) will appear.

Figure 1. Research Administration Page

3. Click on **Letters of Intent** (circled in Figure 1).

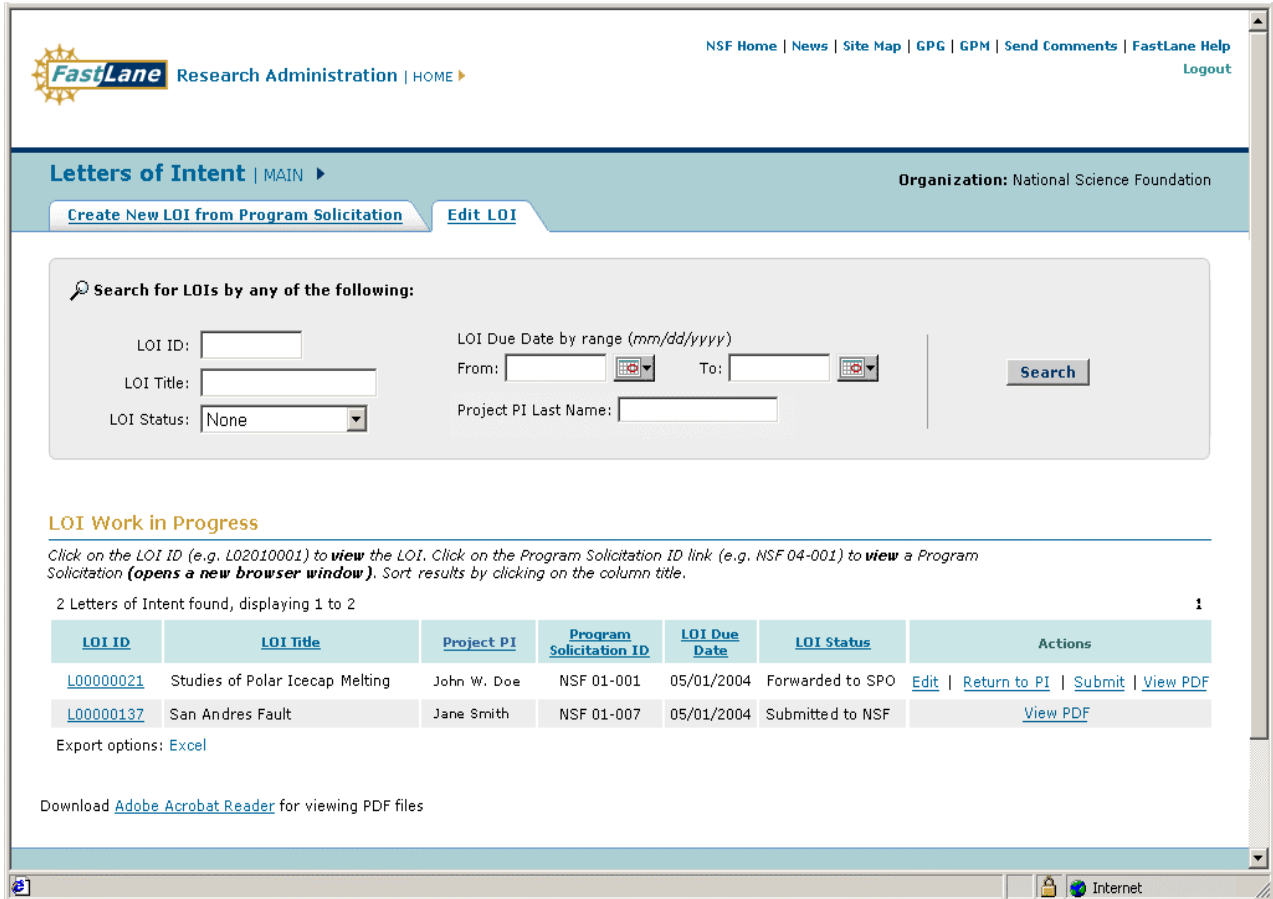4. The *Edit LOI List Page* (Figure 2) will appear.

Figure 2. Edit LOI List Page

5. The SPO can search for a particular LOI by the following:

   - LOI ID
   - LOI Title
   - LOI Status
   - LOI Due Date by range (mm/dd/yyyy)
   - Project PI Name

6. LOIs will appear and can be sorted by the following:

   - LOI ID
   - LOI Title
   - LOI Due Date
   - Project PI

- LOI Status (Forwarded, Submitted, Saved)

7. The SPO may have the following options:

   a) Create a New LOI.

   b) View a LOI. (Go to Page 11b-14 of the User Guide)

   c) Delete a LOI. (Go to Page 11b-18 of the User Guide)

   d) Edit a LOI. (Go to Page 11b-20 of the User Guide)

   e) Return a LOI to a PI. (Go to Page 11b-23 of the User Guide)

   f) Submit a LOI. (Go to Page 11b-27 of the User Guide)

Create a New LOI

1. Click **Create New LOI from Program Solicitation** tab.

2. The *Create New LOI from Program Solicitation Tab* (Figure 3) will appear. The PI can search for particular solicitations by the following:

   - Program Solicitation ID
   - Program Solicitation Title
   - NSF Directorate
   - LOI Due Date by range (mm/dd/yyyy)
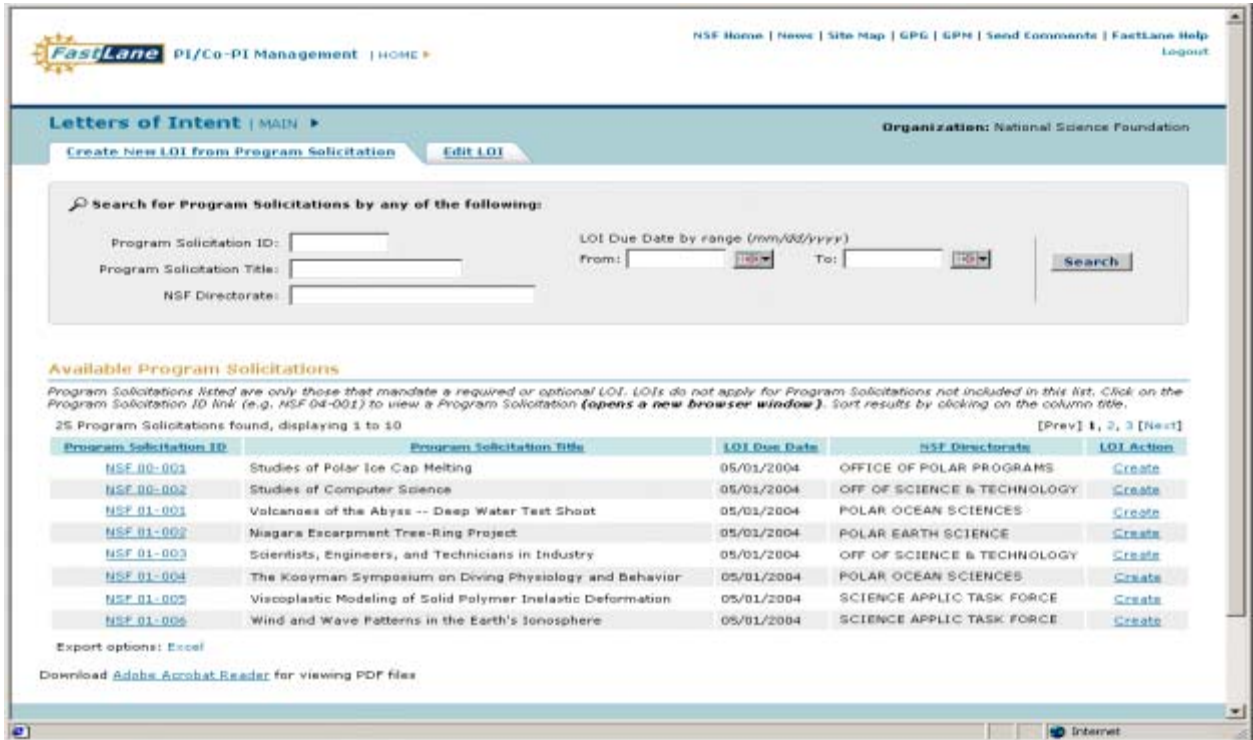
Figure 3. Create New LOI from Program Solicitation Tab

3. Available Program Solicitations appear and can be sorted by the following:

   - Program Solicitation ID
   - Program Solicitation Title
   - LOI Due Date
   - NSF Directorate

4. Click on a Program Solicitation ID to view a particular program solicitation. Close the pop-up window once finished viewing the solicitation to return to the Program Solicitation List.

5. Click **Create** in the LOI Action column to create a new LOI for the chosen Program Solicitation.

6. The *Create LOI Page* will appear (top of screen - Figure 4, bottom of screen - Figure 5). Note: The three questions at the bottom of Figure 4 are dynamic text fields related to a particular solicitation. The contexts of these questions vary depending on the solicitation. When creating a LOI, the PI may see none or up to three questions.

Figure 4. Create LOI Page (top)

Figure 5. Create LOI Page (bottom)

7. Enter in Project Title (required), Synopsis (required), and Other Comments (optional).

8. Select an Organizational Attribute (optional) from the drop-down menu.

9. Enter in responses to the questions in the appropriate boxes (if applicable). Note: These questions derive from the PO and are customized for the solicitation. There may be zero or three of these questions.

10. Select the NSF Point of Contact. You can use the logged-in name as a contact or an alternate. If alternate is selected, enter in his/her First Name, Middle Initial, Last Name, Telephone Number, E-Mail Address, and Department. The NSF Point of Contact can also be the PI.

11. Enter Project PI First Name, Middle Initial, Last Name, and Organization Name (required). The Project PI may also be the same person as the NSF Point of Contact.

12. Select Primary, Secondary, or Tertiary Directorate/Divisions from the provided drop-down lists (if applicable). Note: These fields will only appear if the solicitation is a cross-directorate or encompasses multiple disciplines.

13. Click on **Add/Edit Personnel** (circled in Figure 5) in the Other Senior Project Personnel section of the page to add project personnel.

14. The *Other Senior Project Personnel Page* will appear (Figure 6).

Figure 6. Other Senior Project Personnel Page

15. Enter in the following for Other Senior Project Personnel (as specified):

     a)   First Name
     b)   Middle Initial (optional)
     c)   Last Name
     d)   Organization Name

e)   Department
f)   City
g)   State
h)   Country

16. Click **Add to List** to add the person to Other Senior Project Person. Repeat Steps 13 through 15 if you are entering in more than one Other Senior Project Personnel.

17. Click **Edit** or **Delete** next to the added persons name (circled in Figure 6) if you wish to edit or delete a previously entered entry.

18. Click **Return to Form** to return to the *Updated Create LOI Page [bottom]* (Figure 7). The newly added project personnel will appear under the Other Senior Project Personnel list.

Figure 7. Updated Create LOI Screen Page [bottom]

19. Click **Add Organization** (circled in Figure 7) in the Participating Organizations section of the Updated *Create LOI Page [bottom]* (Figure 7).

20. The *Add / Edit Participating Organizations Page* will appear (Figure 8).

Figure 8. Add/Edit Participating Organization Page

21. Enter in the Organization Name in the text box and click **Add to List**. Go to Step 18.

    Or

    Click **FastLane Organization Search** Link. The *Organization Search Page* appears (Figure 9).

Figure 9. Organization Search Page

a.   Enter at least three letters of the organization you wish to locate and one radio button (begins with, ends with, or contains) to correspond within the organization.

b.   Click **Search Organization**.

c.   An Organization *Search Results Page* will appear (Figure 10).
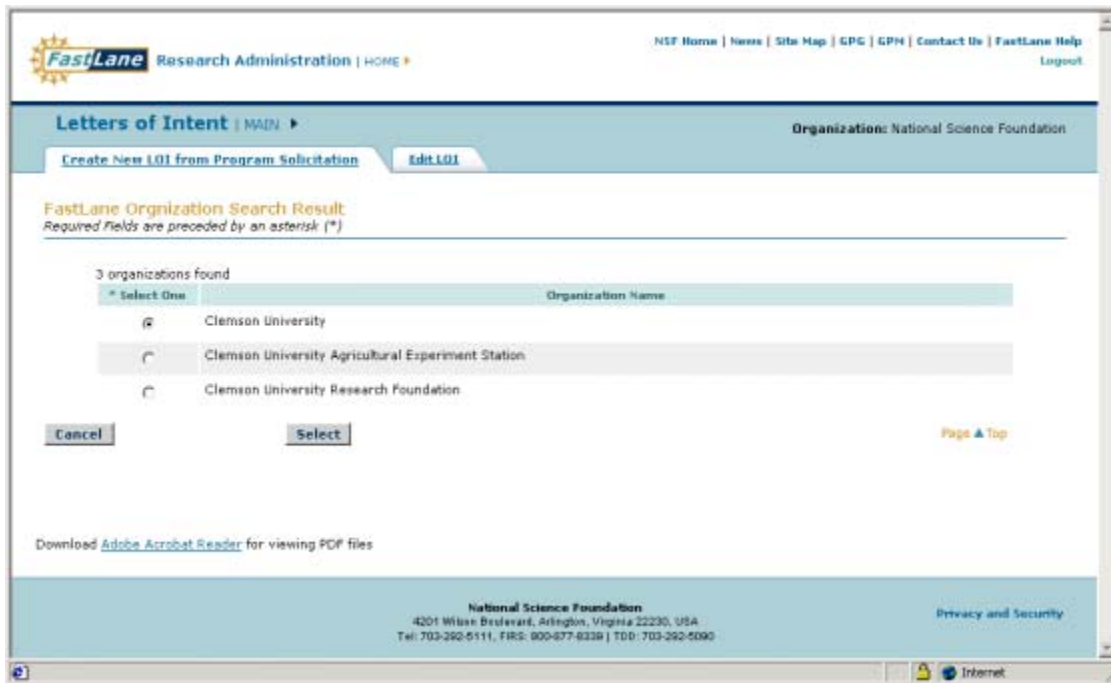
Figure 10. Organizational Search Results Page

> d.   Click on the radio button of the organization that meets your search criteria and click on **Select**.

> e.   The Organization Name will appear in the text box on the *Add/Edit Participating Organizations Page* (Figure 8). Click **Add to List**.

22.   The *Add / Edit Participating Organizations Page* will appear with the added organization displayed at the bottom of the page (Figure 11).
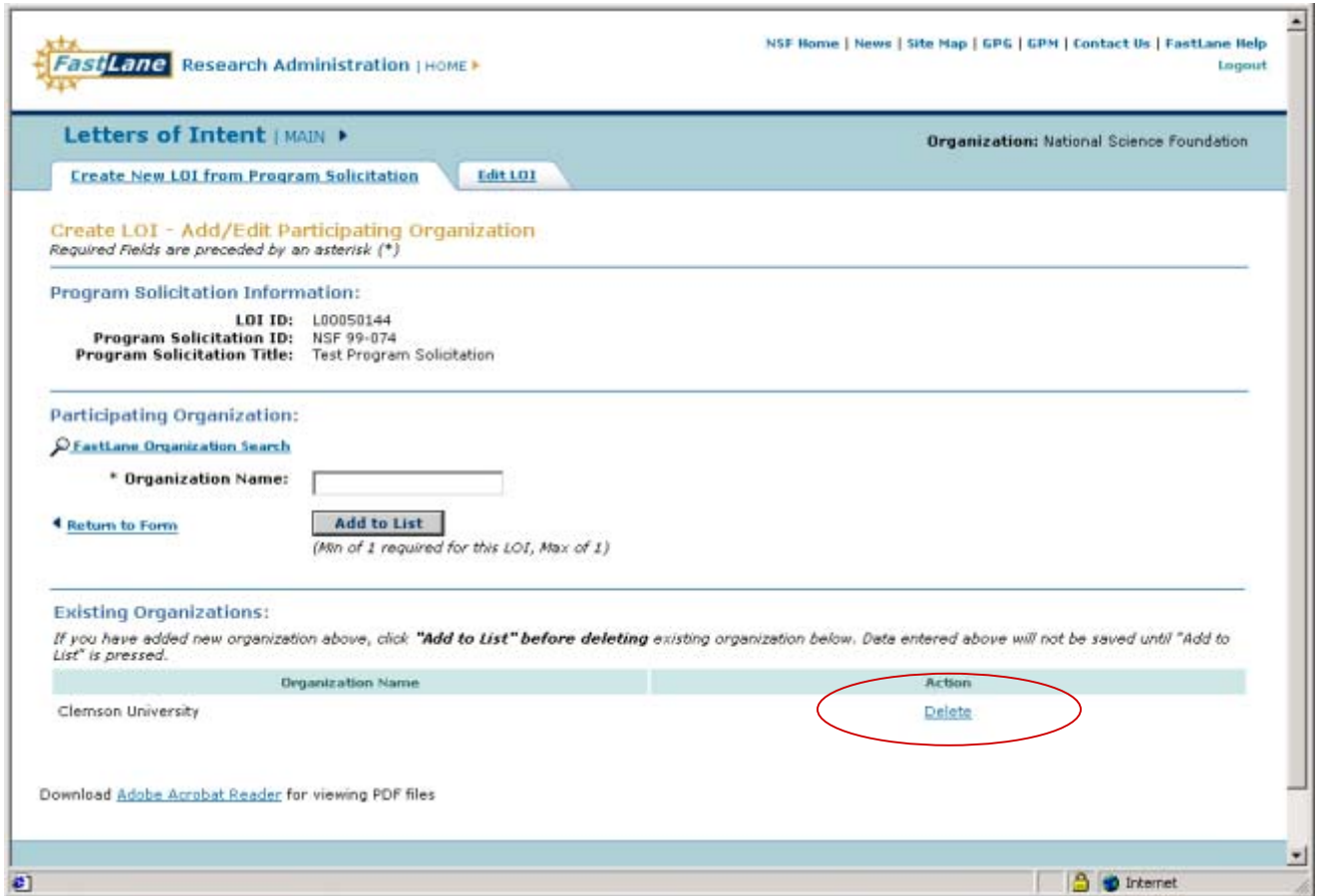
Figure 11. Add/Edit Organizations Page

23. Click **Return to Form** link or repeat steps 19 through 22 to add additional Participating
    Organizations. To delete Participating Organizations, click **Delete** (circled in Figure 11).

24. Click **Save** to retain all work. Return to Step 4 of *Access the LOI Module* on Page 11b-3
    in the User Guide.

    Or

    Click **Cancel** to end the LOI creation or edit. Return to Step 4 of *Accessing the LOI
    Module* on Page 11b-3 in the User Guide.

    Or

    Click **Submit** to submit the LOI to NSF. Go to Submit a LOI Section on Page 11b-27 of
    the User Guide.

View a LOI

SPOs can view all LOIs within their organization, regardless of the LOI status. These LOIs include those that have been submitted to NSF by PIs within their organization. For PI submitted LOIs, SPOs can only view the LOIs.

1. To view a PDF version of a LOI, click **View PDF** of an LOI you wish to view (circled in Figure 12). A PDF version of the LOI will appear (Figure 13). Click **Back** on your browser to return to the *Edit LOI List Page*.
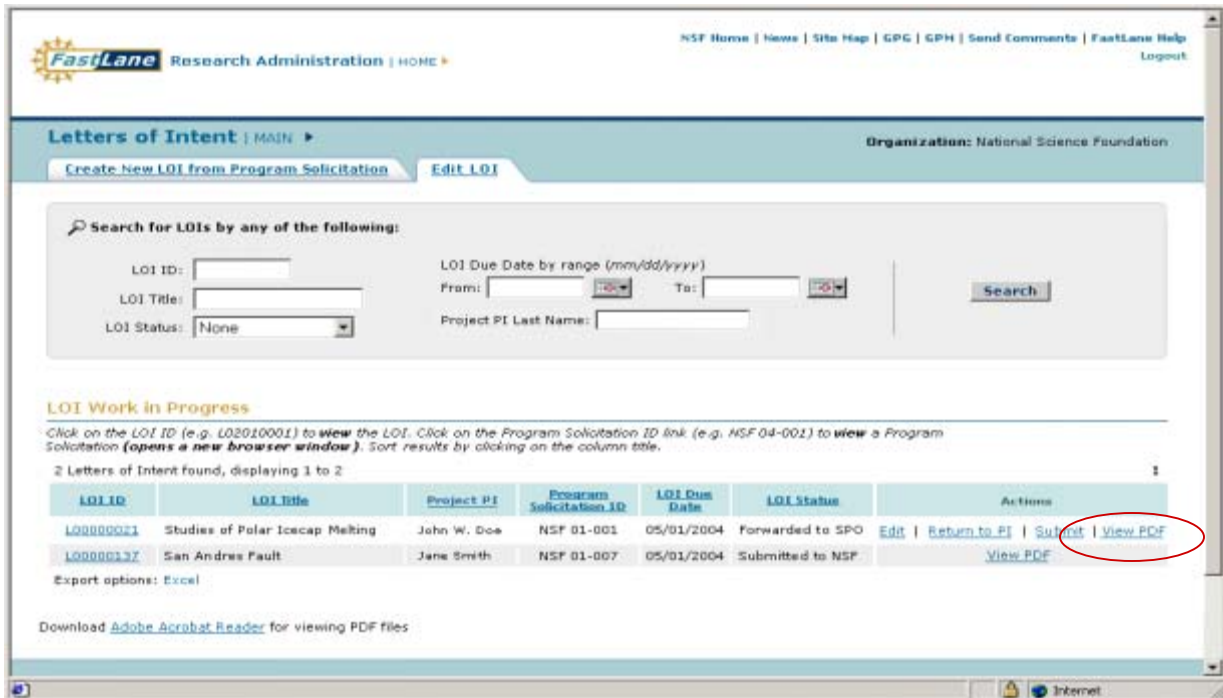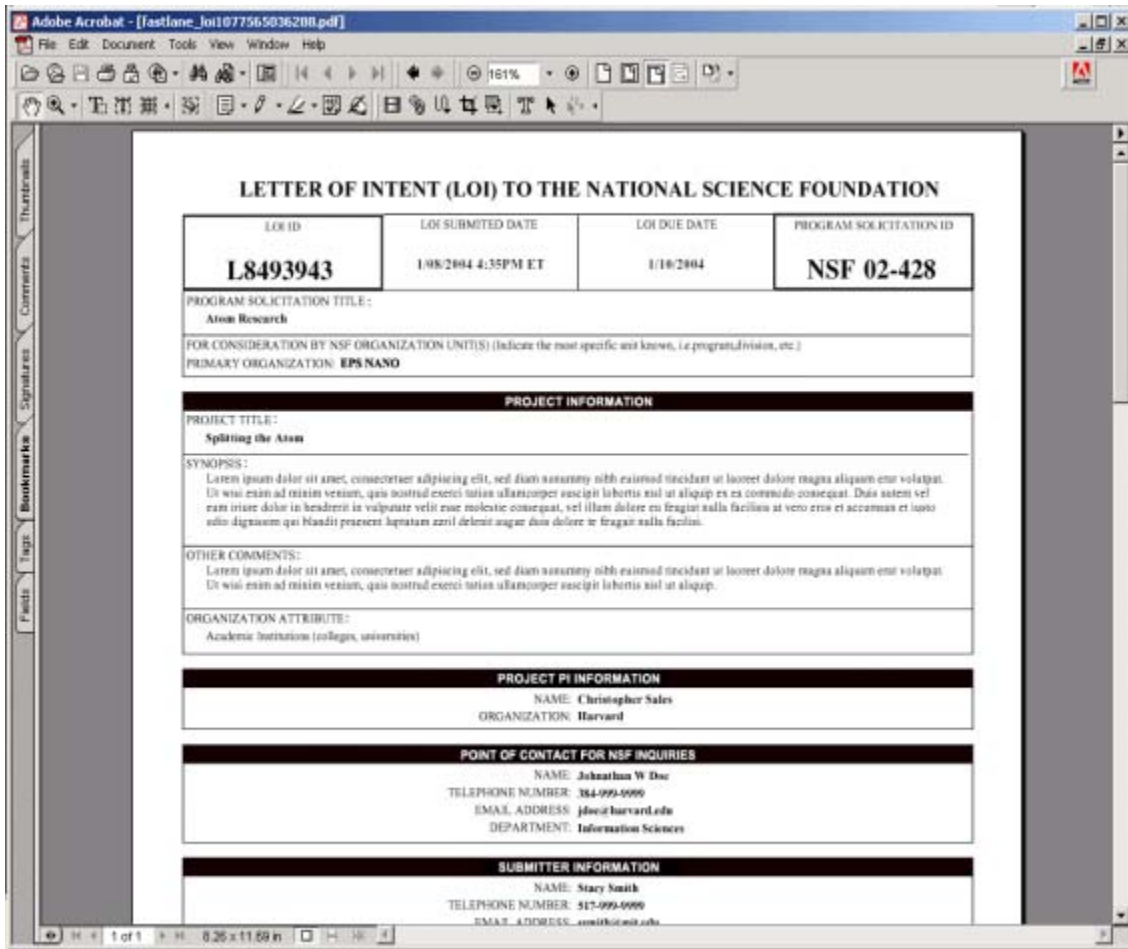

Figure 12. Edit LOI List Page

Figure 13. LOI PDF

2. To view a HTML version of a LOI, click on the LOI ID link of an LOI you wish to view (circled in Figure 14).
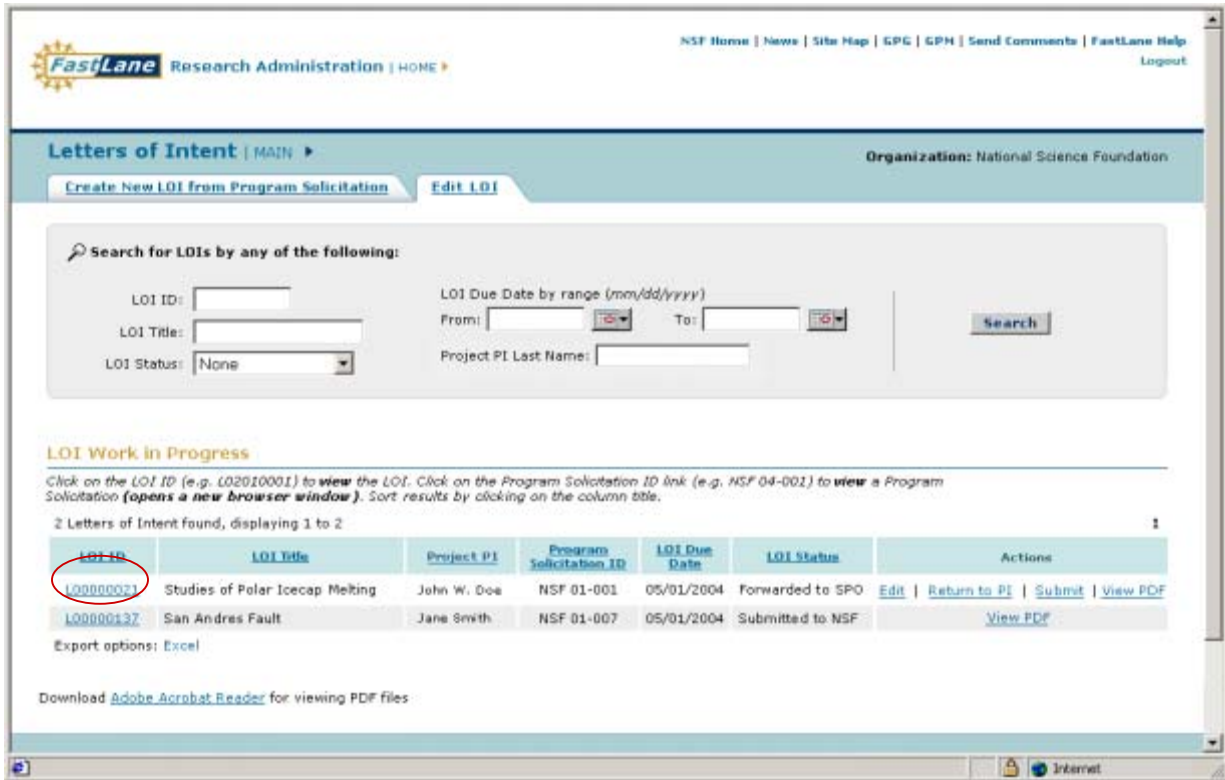
Figure 14. Edit LOI List Page

3. A HTML version of the LOI will appear (Figure 15). This page can be printed from your Internet browser.
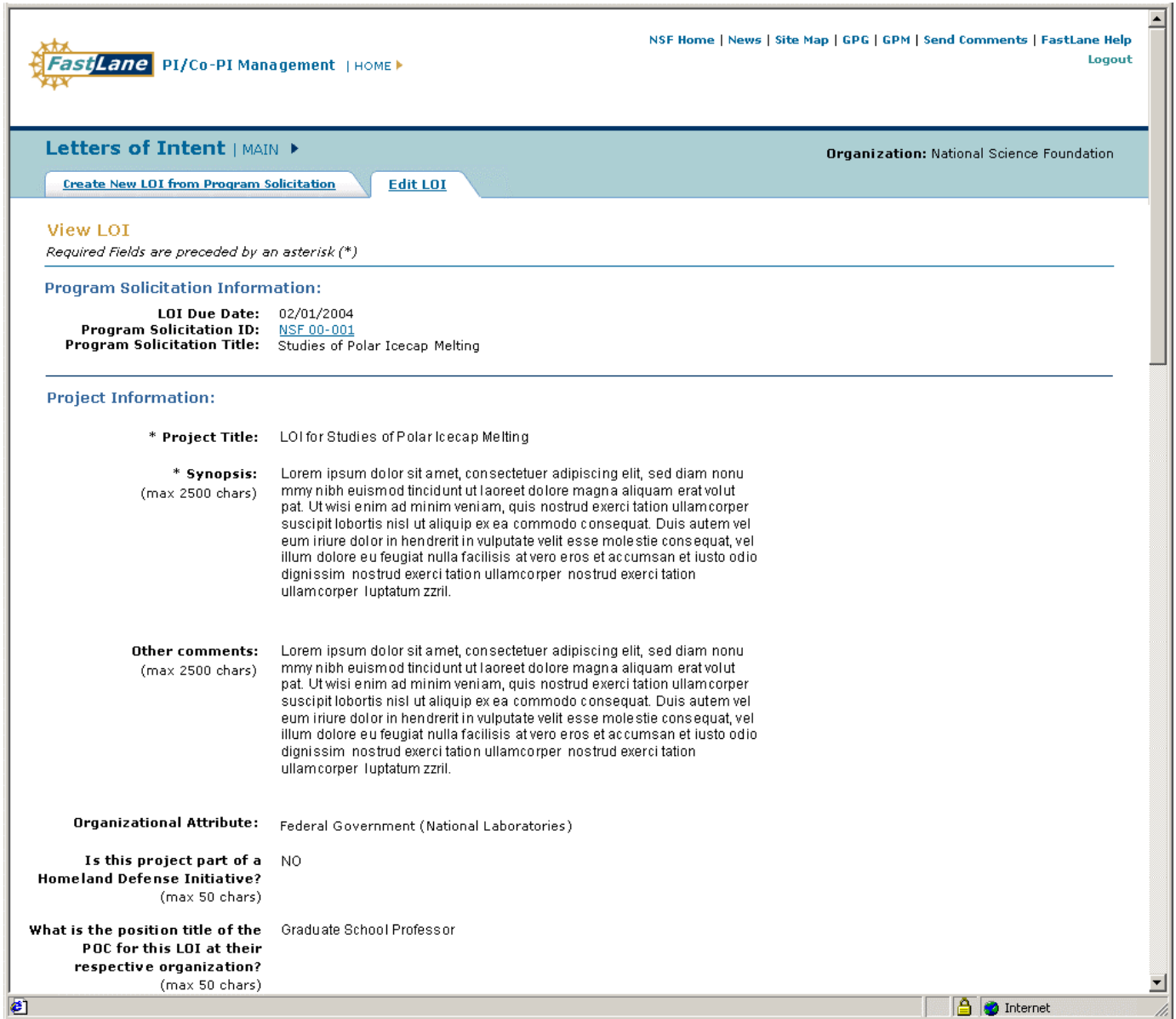
Figure 15. View LOI Page (HTML)

Delete a LOI

A SPO can only delete LOIs that he or she created. A SPO cannot delete a LOI created or forwarded to them from a PI. To delete an LOI, complete the following steps:

1. On the *Edit LOI List Page*, click on the Delete link (circled in Figure 16).
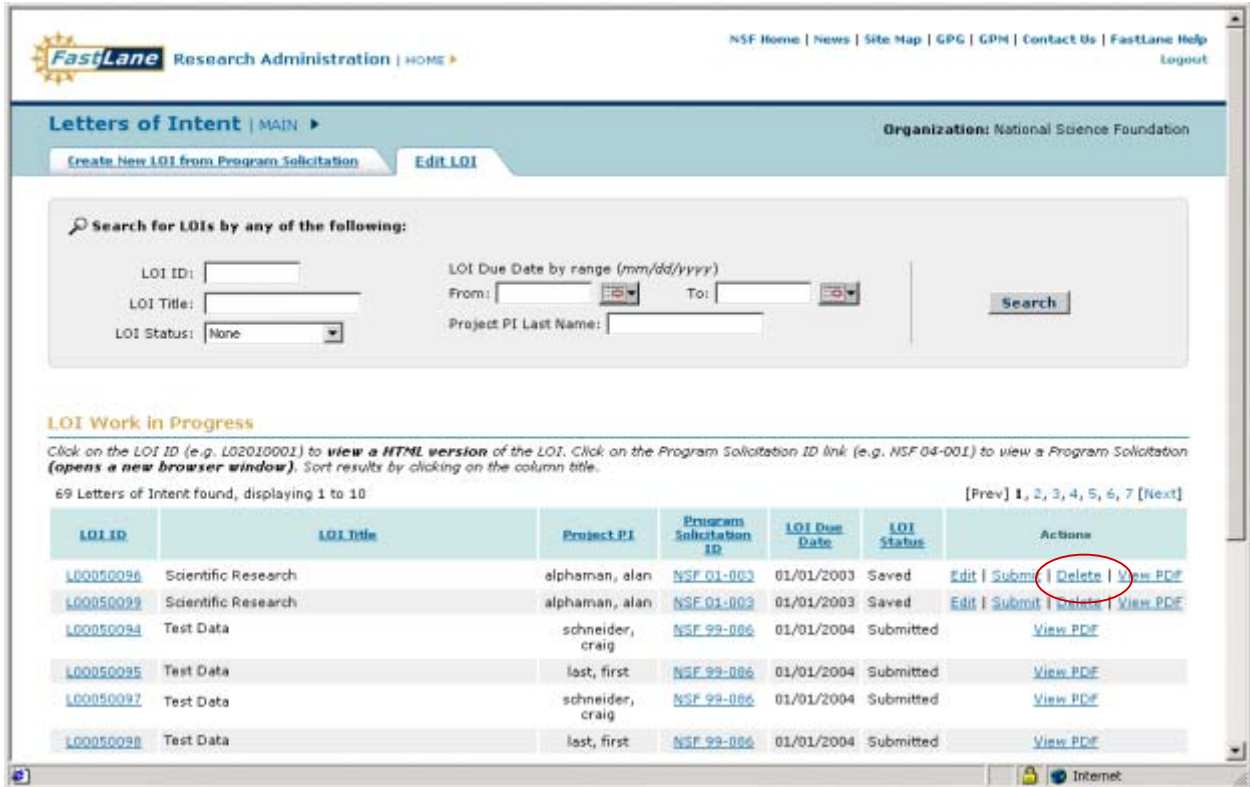
Figure 16. Edit LOI List Page

2. An *Are You Sure Page* (Figure 17) will appear and ask if you wish to continue with your decision. Click **Delete** to delete the LOI and return to the *Edit LOI List Page* (Figure 16). Click **Cancel** to return to the *Edit LOI List Page* (Figure 16).
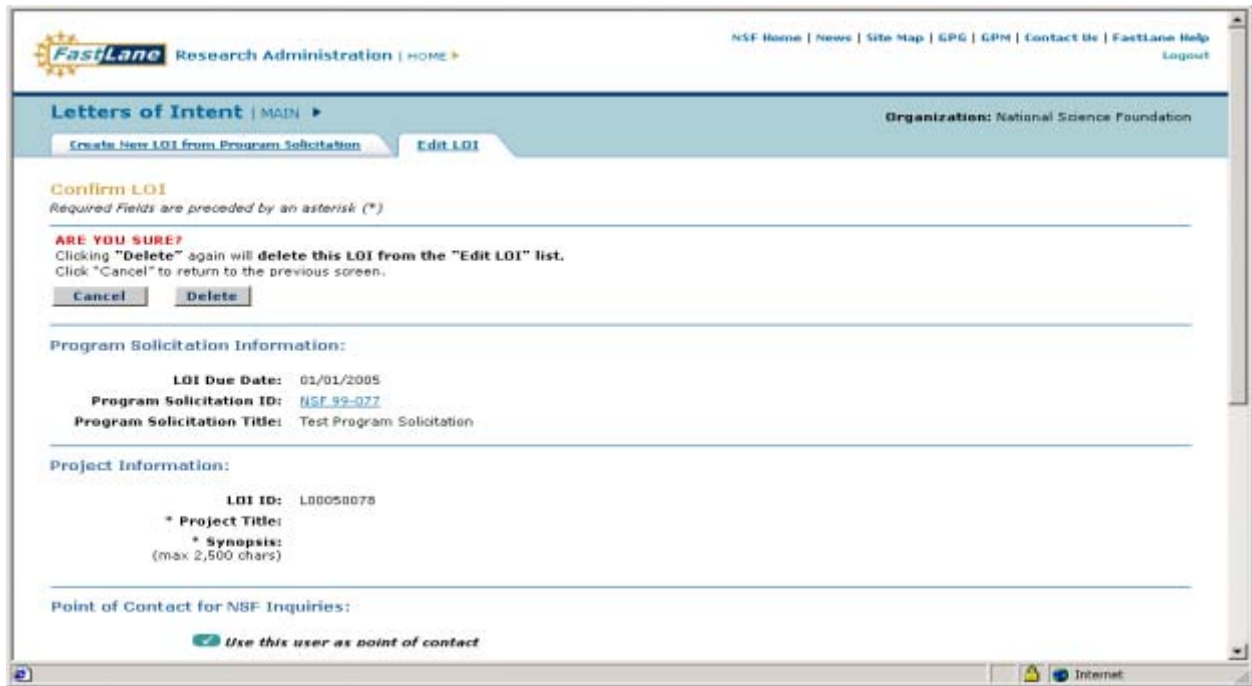
Figure 17. Delete Are Your Sure Page

Edit a LOI

A SPO can edit either a LOI they create or a LOI forwarded to them from a PI. Both scenarios require similar instructions. Complete the following instructions to edit an LOI:

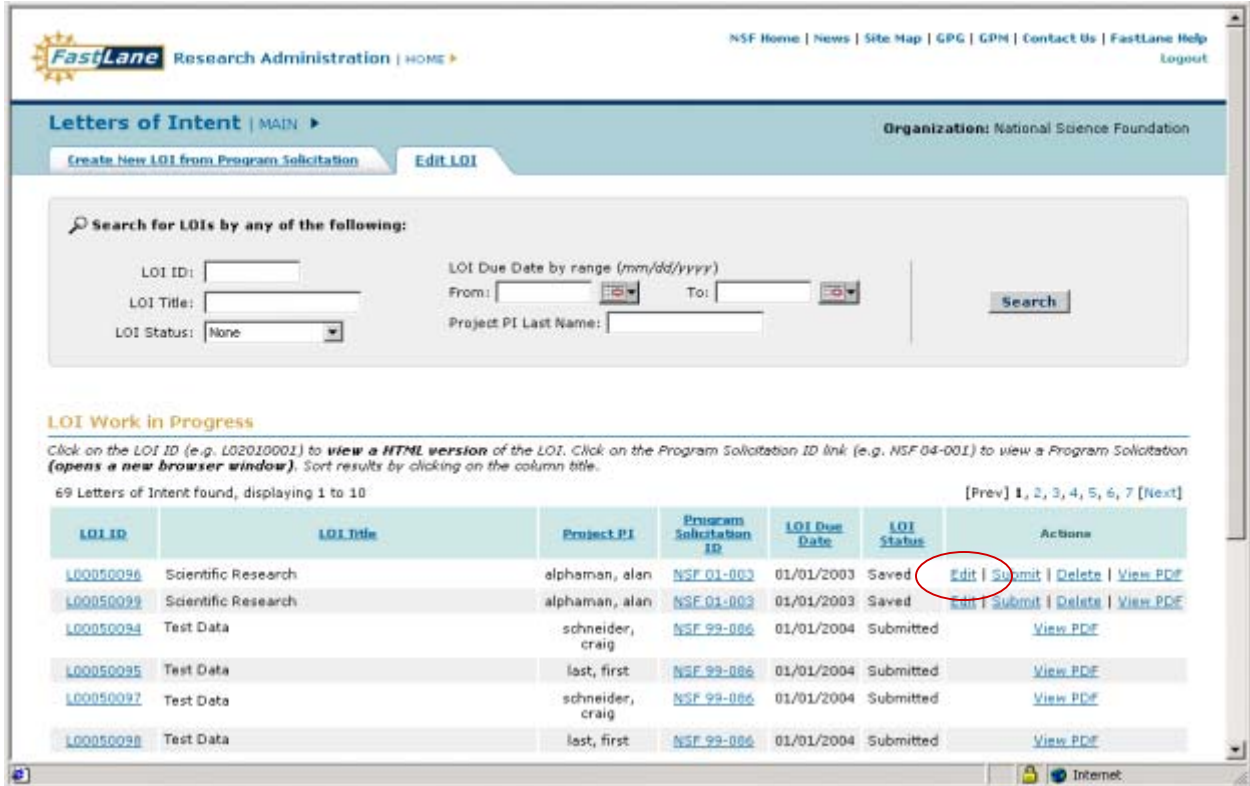1. From the *Edit LOI List Page*, click **Edit** (circled in Figure 18).

Figure 18. Edit LOI List Page

2. The *Edit LOI Page* (Figure 19) will appear.

Figure 19. Edit LOI Page

3. The same text boxes and fields exist when editing an LOI. However, required text entry fields will already be pre-populated. These pre-populated fields can be modified at any time as long as the LOI has not been submitted to NSF:

    i. Project Title
    ii. Synopsis
    iii. Other Comments
    iv. Organization Attributes
    v. Point of Contact for NSF Inquiries Name
    vi. Point of Contact for NSF Inquiries Telephone Number
    vii. Point of Contact for NSF Inquiries Email Address

        viii. Point of Contact for NSF Inquiries Department
         ix. Project PI Name
          x. Project PI Organization
         xi. Primary / Secondary / Tertiary Division (cross directorate – multidisciplinary LOI only)
        xii. Answers to Program Solicitation Questions (if applicable)
       xiii. Other Senior Project Personnel (if applicable)
       xiv. Participating Organizations (if applicable)

4. Click **Save** to retain all changes. The *Edit LOI List Page* (Figure 18) will appear.

   Or

   Click **Cancel** to end the LOI creation or edit. The *Edit LOI List Page* (Figure 18) will appear.

   Or

   Click **Submit** to submit the LOI to NSF (applicable to a SPO's LOI or a LOI forwarded to a SPO from a PI). Go to Submit a LOI Section on Page 4b–27 of the User Guide.

   Or

   Click **Return to PI** to return the LOI to the PI (applicable when the LOI is forwarded to an SPO from a PI). Go to Return a LOI to a PI Section on Page 4b–23 of the User Guide.

Return a LOI to a PI

An SPO can return a LOI to a PI only when the LOI is forwarded to the SPO from a PI. Once a LOI has been submitted to NSF, an SPO cannot return it to the PI.   Complete the following steps:

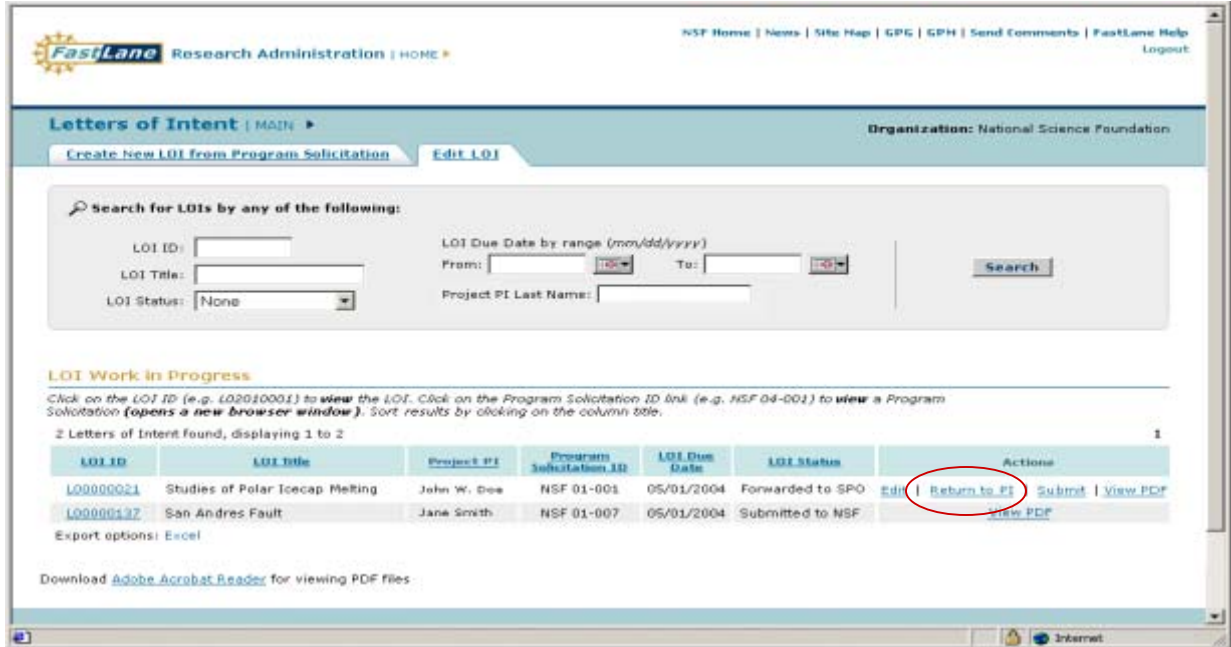1. Click on the Return to PI link on the *Edit LOI List Page* (circled in Figure 20)

Figure 20. Edit LOI List Page

Or

Click **Return to PI** on the *Edit LOI List Page* (circled in Figure 21).

Figure 21. Edit LOI Page

2. A *Return to PI Are You Sure Page* (Figure 22) will appear and ask if you are sure about your decision.
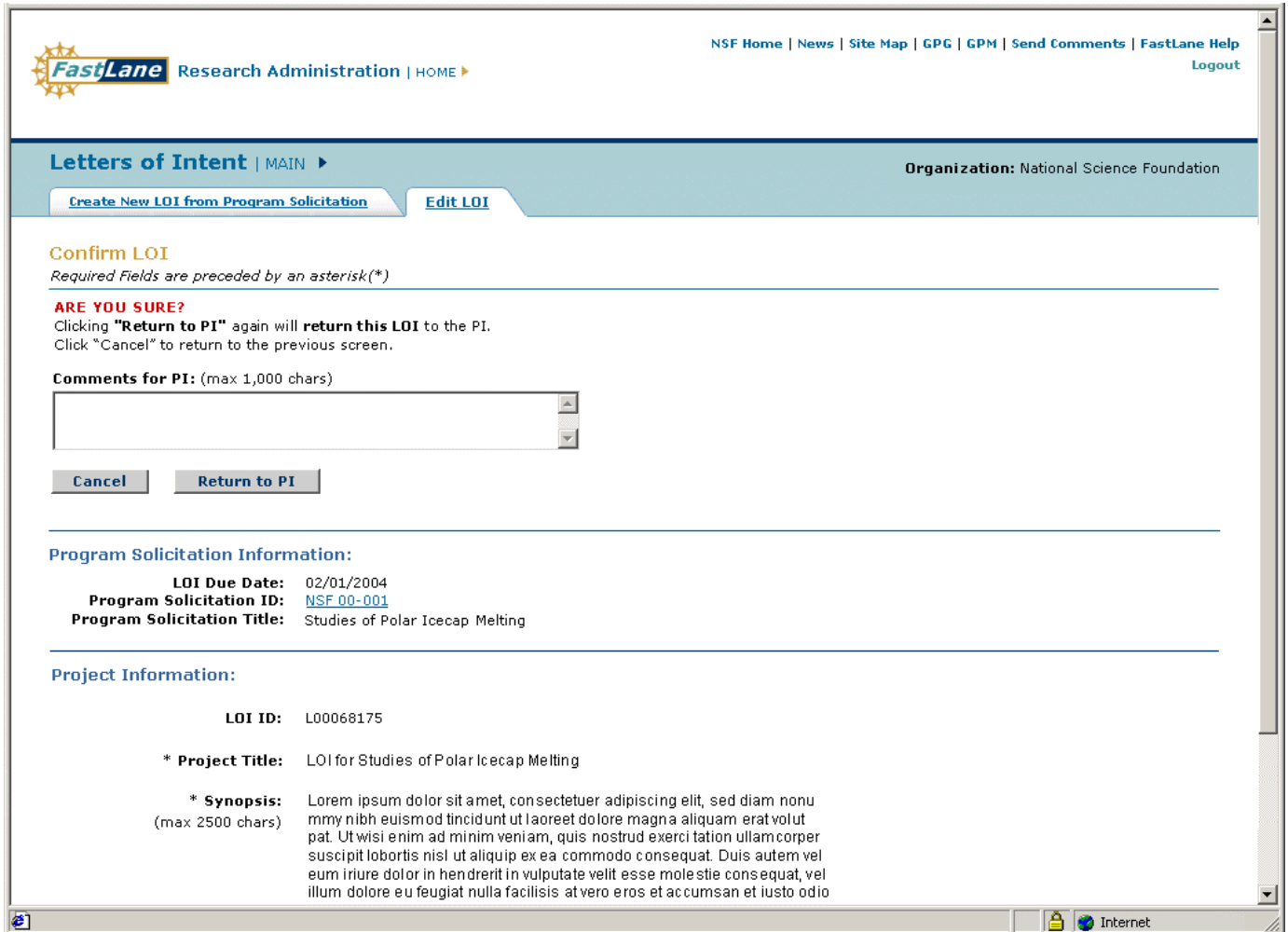
Figure 22. Return to PI Are You Sure Page

3. Enter text in the provided text explaining why the LOI is being returned.

4. Click **Return to PI** to continue or **Cancel** to return to the *Edit LOI List Page* (Figure 20).

5. A *Return Confirmation Page* (Figure 23) will appear. Click **Create New LOI from Program Solicitation List Page** to return to *Create New LOI from Program Solicitation List Page* or **Edit LOI List Page** to return to the *Edit LOI List Page*.
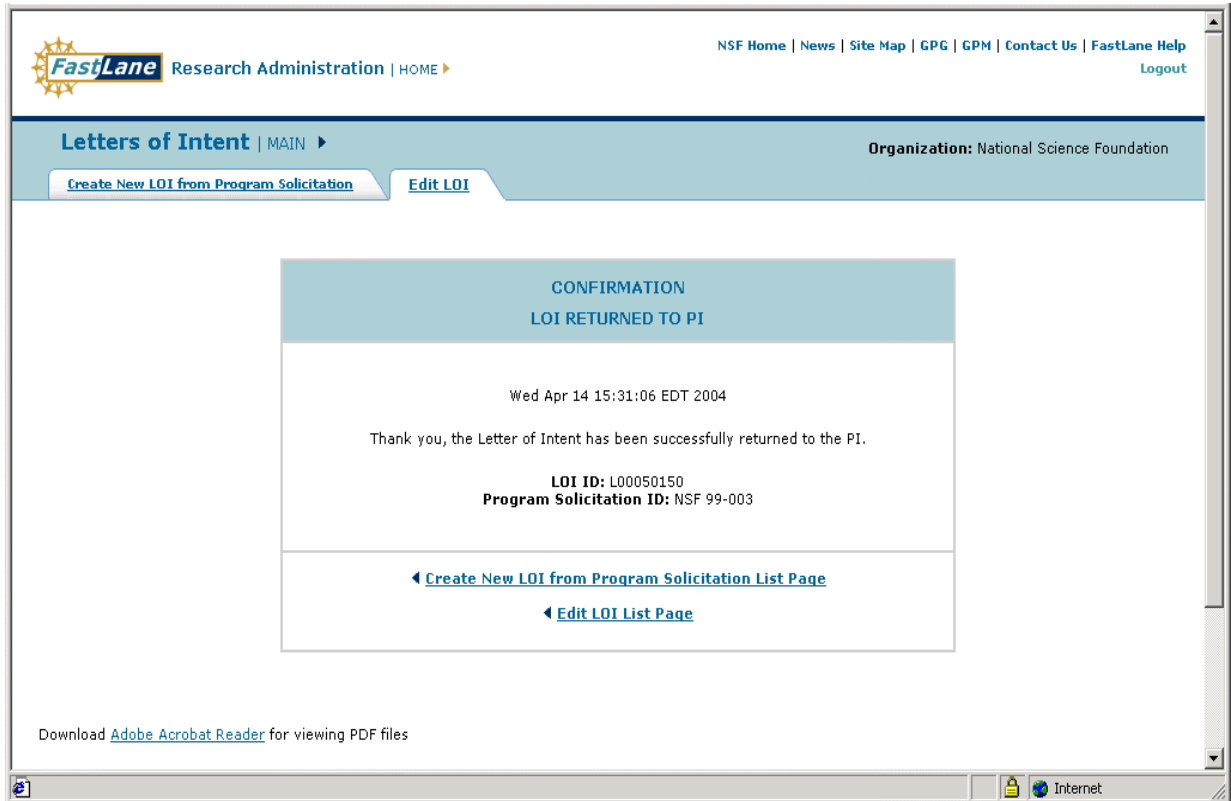
Figure 23. Returned Confirmation Page

Submit a LOI

SPOs can submit a LOI they have created themselves or an LOI forwarded to them by PIs. SPOs cannot submit a LOI that was submitted by a PI to NSF. Complete the following steps to submit an LOI:

1.   Click **Submit** on the *Edit LOI Page* (circled in Figure 24).

Figure 24. Edit LOI Page

Or

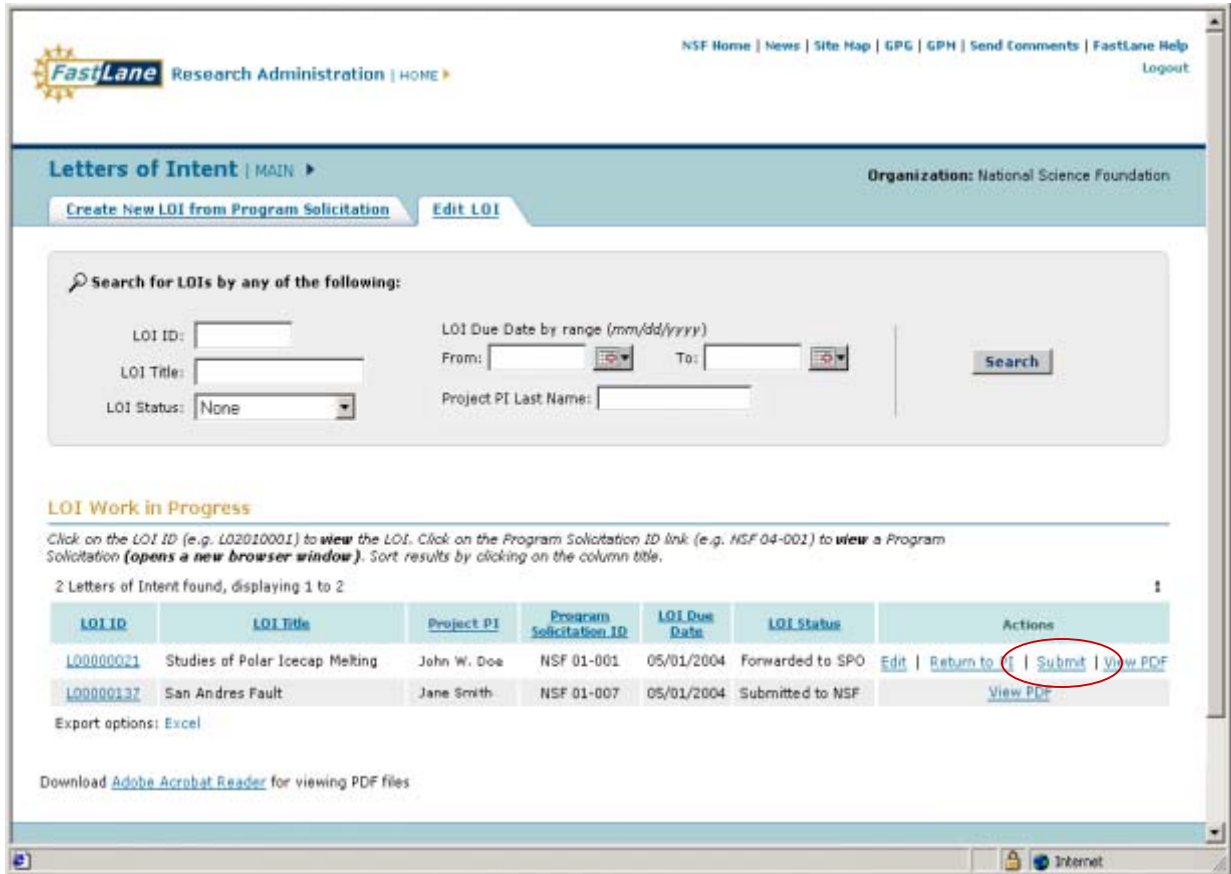Click **Submit** on the *Edit LOI List Page* (circled in Figure 25).

Figure 25. Edit LOI List Page

2.   A *Submit Are You Sure Page* will appear (Figure 26) and ask if you are about your decision. Click **Submit** to submit the LOI or **Cancel** to return to the *Edit LOI List Page* (Figure 25).
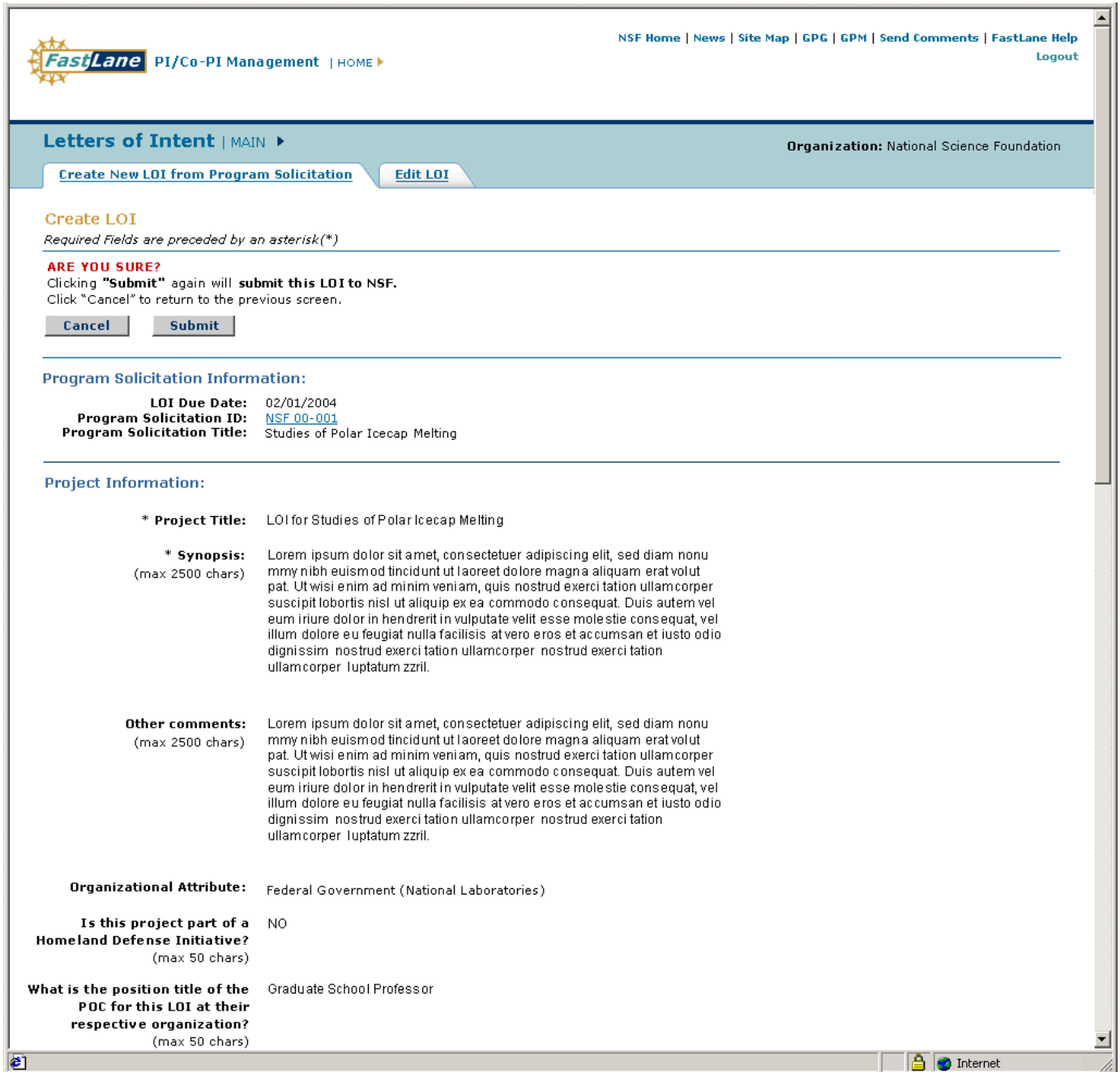
Figure 26. Submit Are You Sure Page

3. A *Submit Confirmation Page* (Figure 27) will appear. Click **Create New LOI from Program Solicitation List Page** to return to the *Program Solicitation List* or **Edit LOI List Page** to return to the *Edit LOI List Page*.
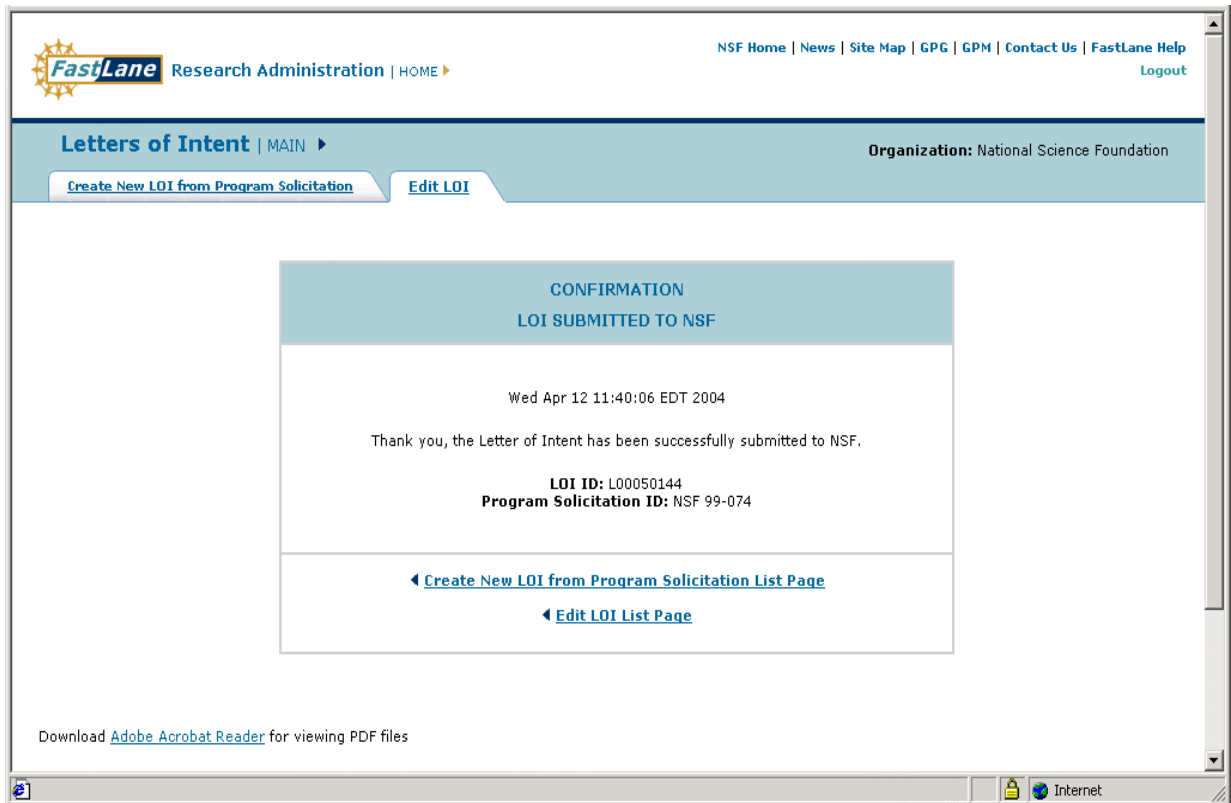
Figure 27. Submit Confirmation Page