

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.

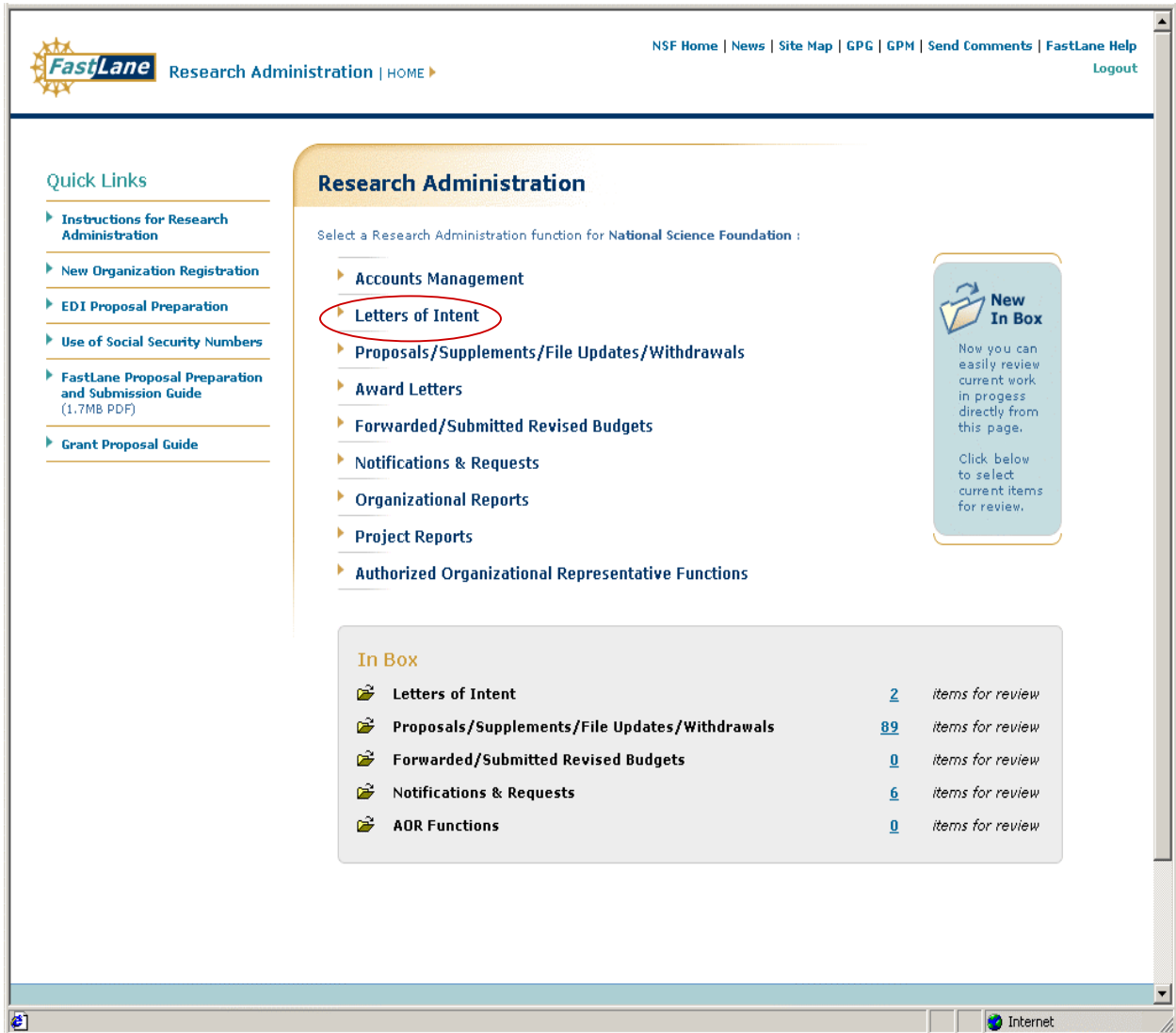


Figure 1. Research Administration Page

3. Click on **Letters of Intent** (circled in Figure 1).
4. The *Edit LOI List Page* (Figure 2) will appear.

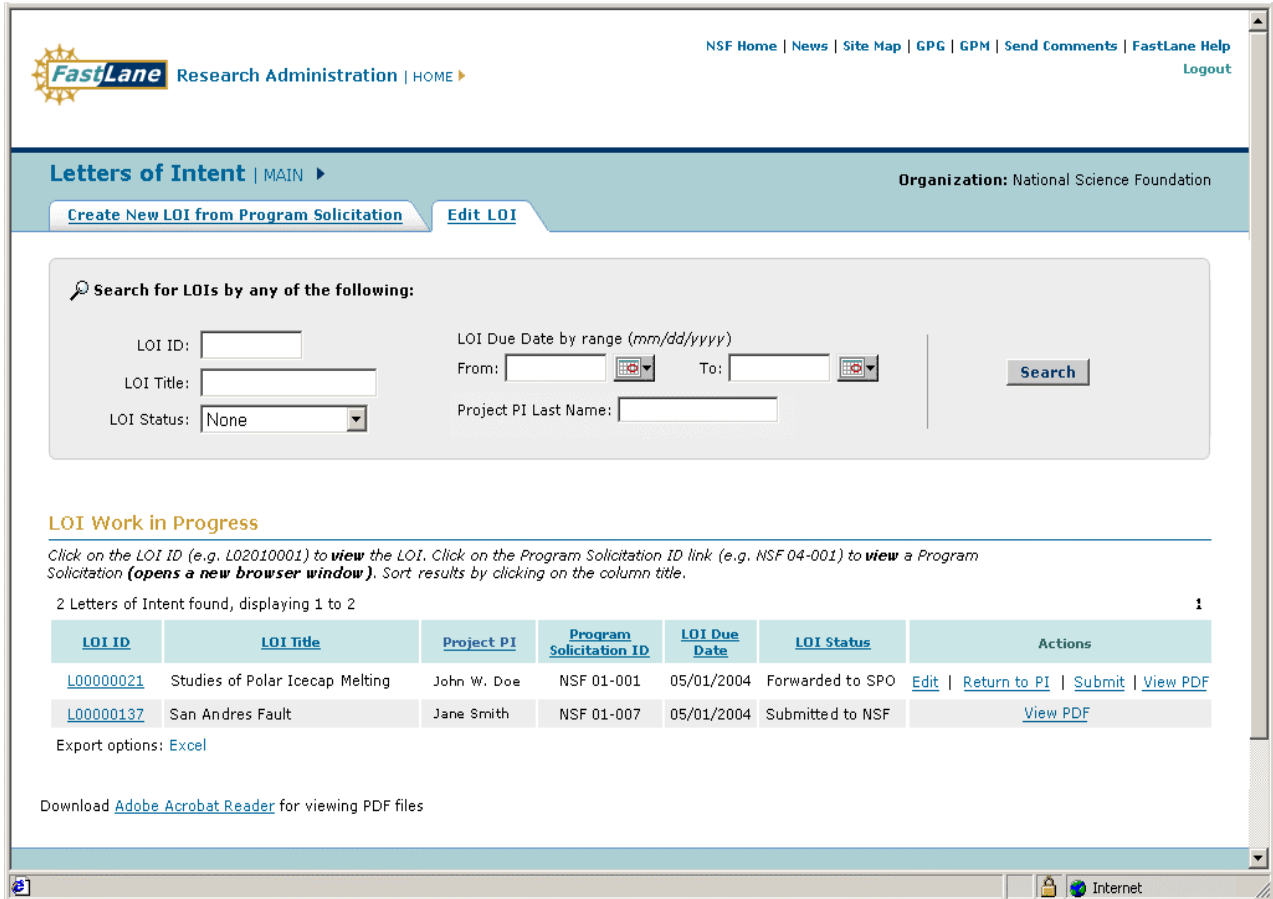


Figure 2. Edit LOI List Page

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)

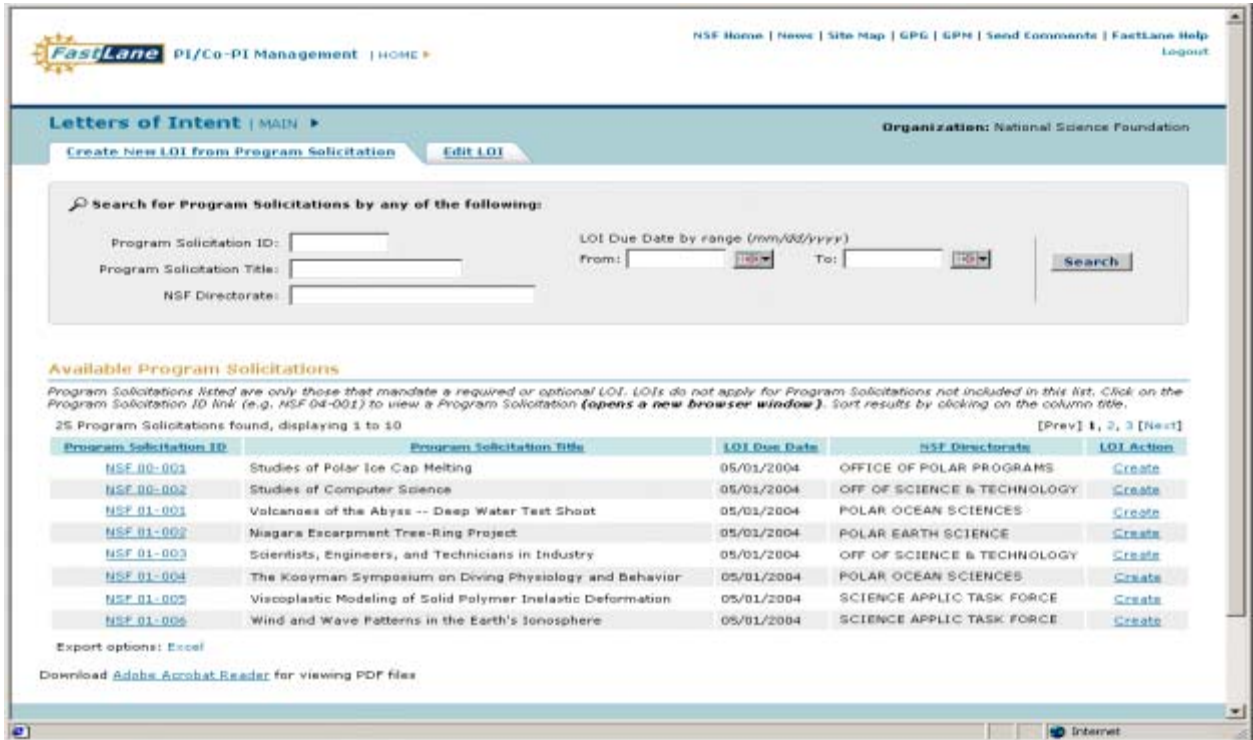


Figure 3. Create New LOI from Program Solicitation Tab

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.

FastLane PI/Co-PI Management | HOME > NSF Home | News | Site Map | GPG | GPH | Send Comments | FastLane Help
Logout

Letters of Intent | MAIN > Organization: National Science Foundation

Create New LOI from Program Solicitation Edit LOI

Create LOI
Required fields are preceded by an asterisk(*)

• **WARNING:** You have already created an LOI for this Solicitation. Additional LOI's may not be considered by NSF.

LOI Due Date: 02/01/2004
Program Solicitation ID: [NSF 00-001](#)
Program Solicitation Title: Studies of Polar Icecap Melting

Project Information:

* Project Title:

* Synopsis:
(max 2500 chars)

Other comments:
(max 2500 chars)

Organizational Attribute:

Is this project part of a
Homeland Defense Initiative?
(max 50 chars)

What is the position title of the
POC for this LOI at their
respective organization?
(max 50 chars)

If the POC is at a university,
what is their area of study?
(max 50 chars)

Internet

Figure 4. Create LOI Page (top)

The screenshot displays a web form titled "Point of Contact for NSF Inquiries:". It features two radio buttons: "Use this (user) name as point of contact" (selected) and "Use this (alternate) name as point of contact". The selected option is populated with: First Name: Jane, Middle Initial: J., Last Name: Doe, Telephone Number: 703-555-1212, Email Address: jdoe@nsf.gov, and Department: DIS. The alternate option has empty input fields for the same fields.

Below this is the "Project PI:" section with input fields for First Name, Middle Initial, Last Name, and Organization Name.

The "Cross Directorate/Multi-disciplinary LOI:" section contains three dropdown menus for Primary, Secondary, and Tertiary Divisions, all set to "Please Select...".

Two sections, "Other Senior Project Personnel:" and "Participating Organizations:", each have a table with a header (Personnel Name / Organization Name) and a note "(Click 'Add Personnel' / 'Add Organization' below)". Below each table is a button: "Add/Edit Personnel" (circled in red) and "Add Organization". Both sections include a note: "(Min of 1 required for this LOI, Max of 4)".

At the bottom are "Cancel", "Save", and "Forward to SPD" buttons. The footer contains NSF contact information and a "Privacy and Security" link.

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).

Letters of Intent | MAIN ▶ Organization: National Science Foundation

Create New LOI from Program Solicitation Edit LOI

Create LOI - Add Other Senior Project Personnel
Required Fields are preceded by an asterisk(*)

LOI ID: L8493943
Program Solicitation ID: NSF 02-428
Program Solicitation Title: Studies of Polar Icecap Melting

Other Senior Project Personnel:

FastLane Personnel Search (Adds personnel from the FastLane user tables)

* First Name: John
Middle Initial: W
* Last Name: Doe
* Organization Name:
* Department:
* City:
* State: Please Select One
* Country: United States

Return to Form Add to List
(Min of 1 required for this LOI, Max of 4)

If you have added new personnel above, click "Add to List" before editing or deleting existing personnel below. Data entered above will not be saved until "Add to List" is pressed.

Personnel Name	Action
Doe, John	Edit Delete
Miracle, Jane	Edit Delete

National Science Foundation
4201 Wilson Boulevard, Arlington, Virginia 22230, USA
Tel: 703-292-6111, FIRS: 800-877-8339 | TDD: 703-292-5090

Privacy and Security

Internet

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.

The screenshot shows a web form titled 'Updated Create LOI Screen Page [bottom]'. At the top, there is a dropdown menu for 'Tertiary Division' with the text 'Please Select...'. Below this, the form is divided into two main sections: 'Other Senior Project Personnel' on the left and 'Participating Organizations' on the right. The 'Other Senior Project Personnel' section has a table with two rows: 'John W Doe' and 'Jane Miracle'. Below the table is a button labeled 'Add/Edit Personnel' and a note '(Min of 1 required for this LOI, Max of 4)'. The 'Participating Organizations' section has a text input field for 'Organization Name' with a note '(Click "Add Organization" below)'. Below the input field is a button labeled 'Add Organization', which is circled in red. Below this button is a note '(Min of 1 required for this LOI, Max of 4)'. At the bottom of the form, there are three buttons: 'Cancel', 'Save', and 'Forward to SPD'. The footer of the page contains the National Science Foundation logo and contact information: '4201 Wilson Boulevard, Arlington, Virginia 22230, USA', 'Tel: 703-292-8111, FRS: 800-877-8339 | TDD: 703-292-5080', and a 'Privacy and Security' link. The browser's address bar shows 'Internet'.

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).

The screenshot displays the 'Add/Edit Participating Organization' page. At the top, there is a navigation bar with 'FastLane Research Administration | HOME' and a menu with 'NSF Home | News | Site Map | EPG | EPH | Contact Us | FastLane Help | Logout'. Below this is a sub-header 'Letters of Intent | MAIN' and a breadcrumb 'Organization: National Science Foundation'. The main content area is titled 'Create LDI - Add/Edit Participating Organization' with a note that required fields are marked with an asterisk. It contains sections for 'Program Solicitation Information' (LOI ID: L00050144, Program Solicitation ID: NSF 99-074, Program Solicitation Title: Text Program Solicitation), 'Participating Organization' (with a search link and a text box for 'Organization Name'), and 'Existing Organizations' (with a table showing 'None Entered Yet'). A 'Return to Form' link and an 'Add to List' button are also present. A footer note suggests downloading Adobe Acrobat Reader for PDF files.

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).

FastLane Research Administration | HOME | NSF Home | News | Site Map | GPS | GPH | Contact Us | FastLane Help | Logout

Letters of Intent | MAIN | Organization: National Science Foundation

Create New LOI from Program Solicitation | Edit LOI

FastLane Organization Search
Required Fields are preceded by an asterisk (*)

* Organization Name:
(At least 3 letters)

Begins with
 Ends with
 Contains

Cancel | Search Organization

Download [Adobe Acrobat Reader](#) for viewing PDF files

National Science Foundation
4201 Wilson Boulevard, Arlington, Virginia 22230, USA
Tel: 703-292-5111, FHS: 800-877-8339 | TDD: 703-292-5090

Privacy and Security

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).

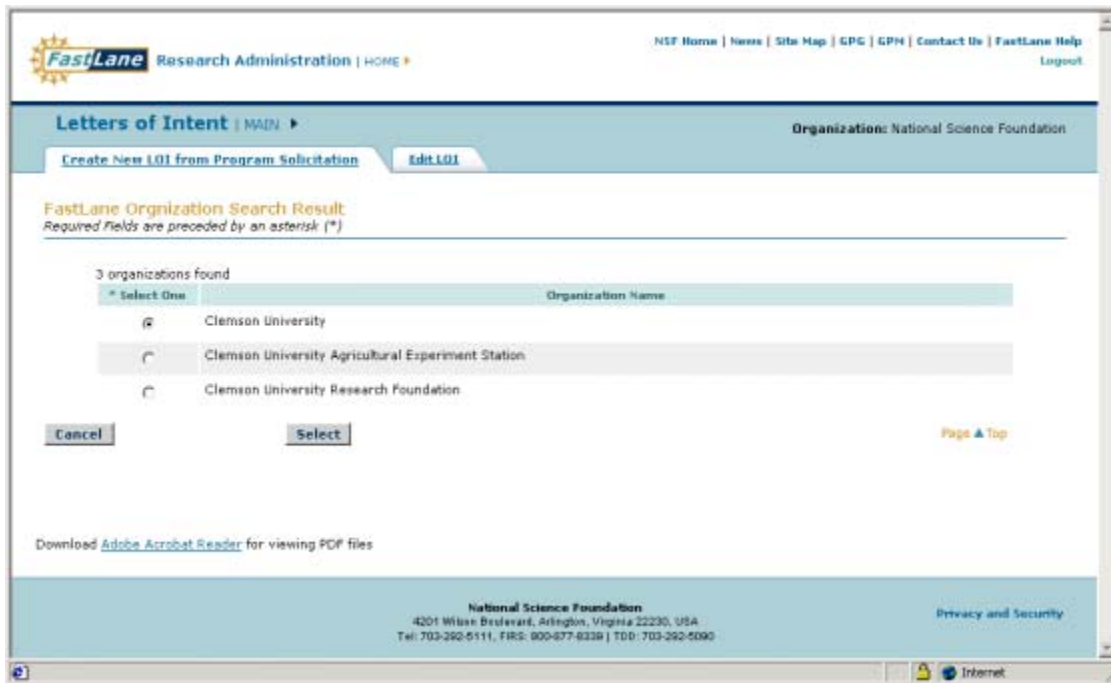


Figure 10. Organizational Search Results Page

- 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).

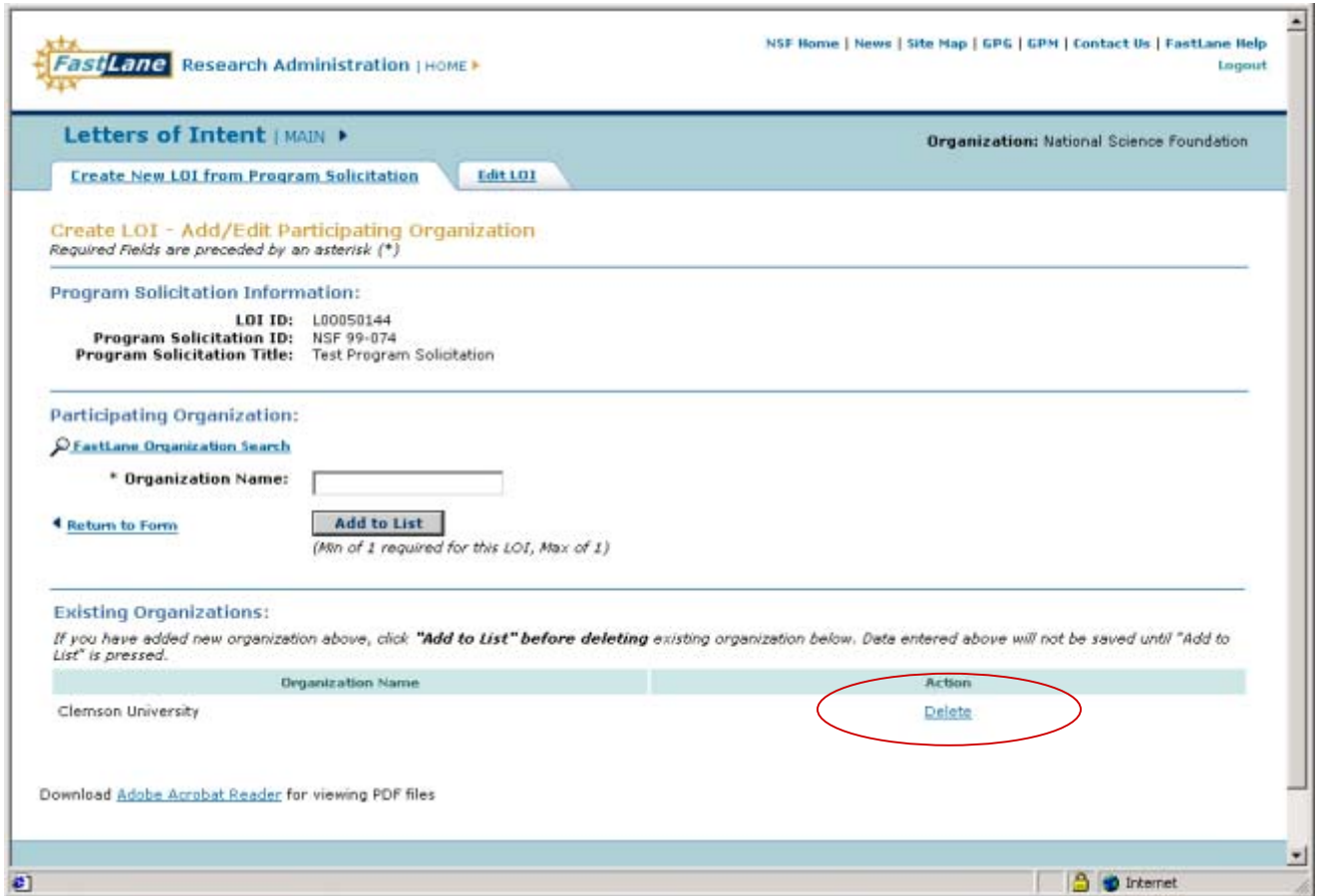


Figure 11. Add/Edit Organizations Page

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*.

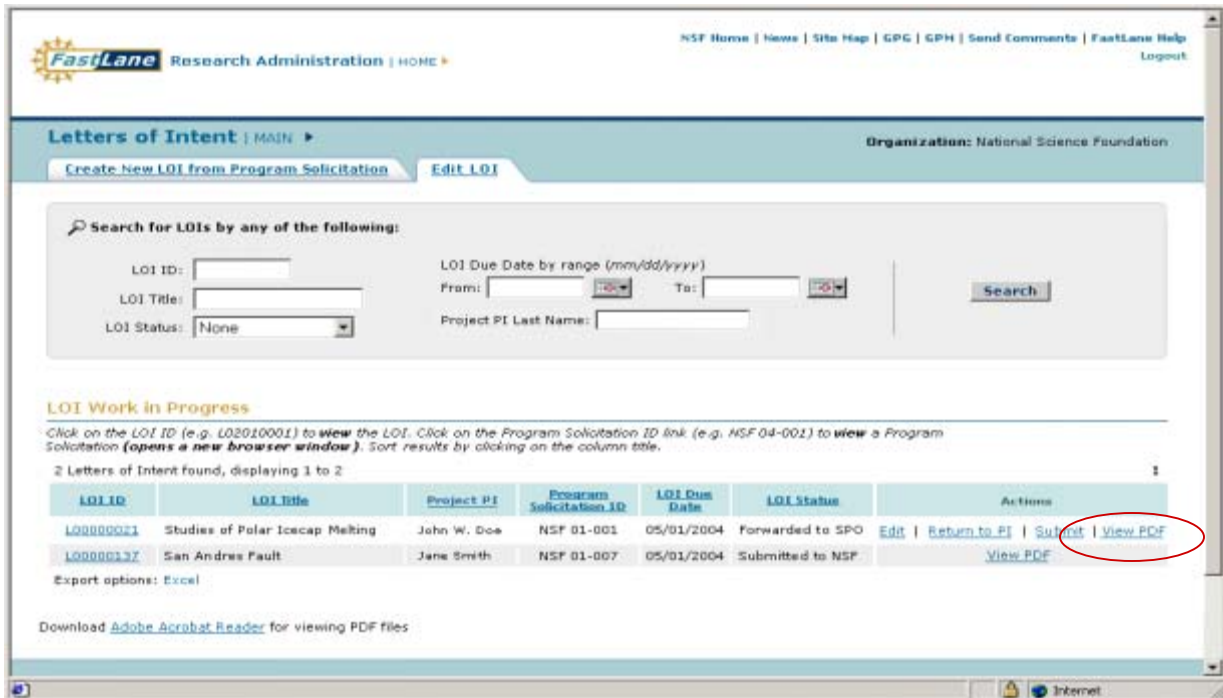


Figure 12. Edit LOI List Page

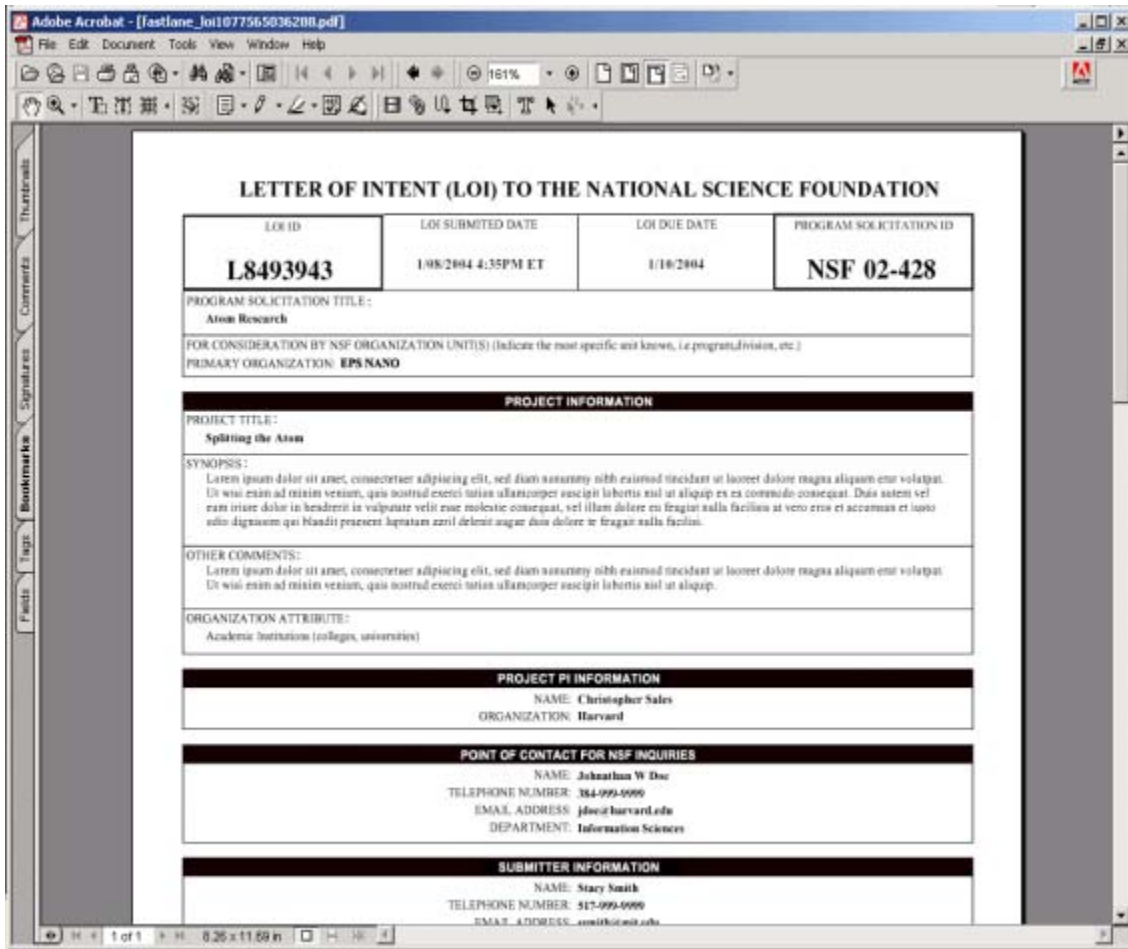


Figure 13. LOI PDF

- 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).

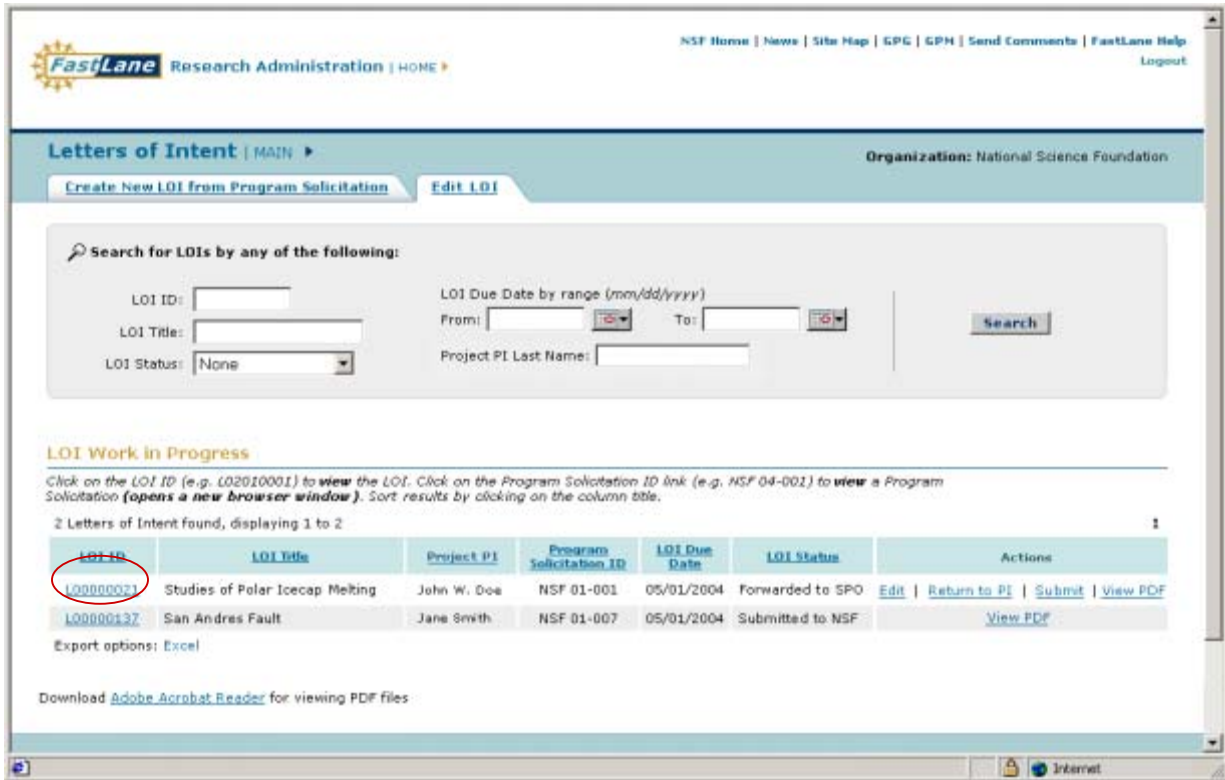


Figure 14. Edit LOI List Page

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

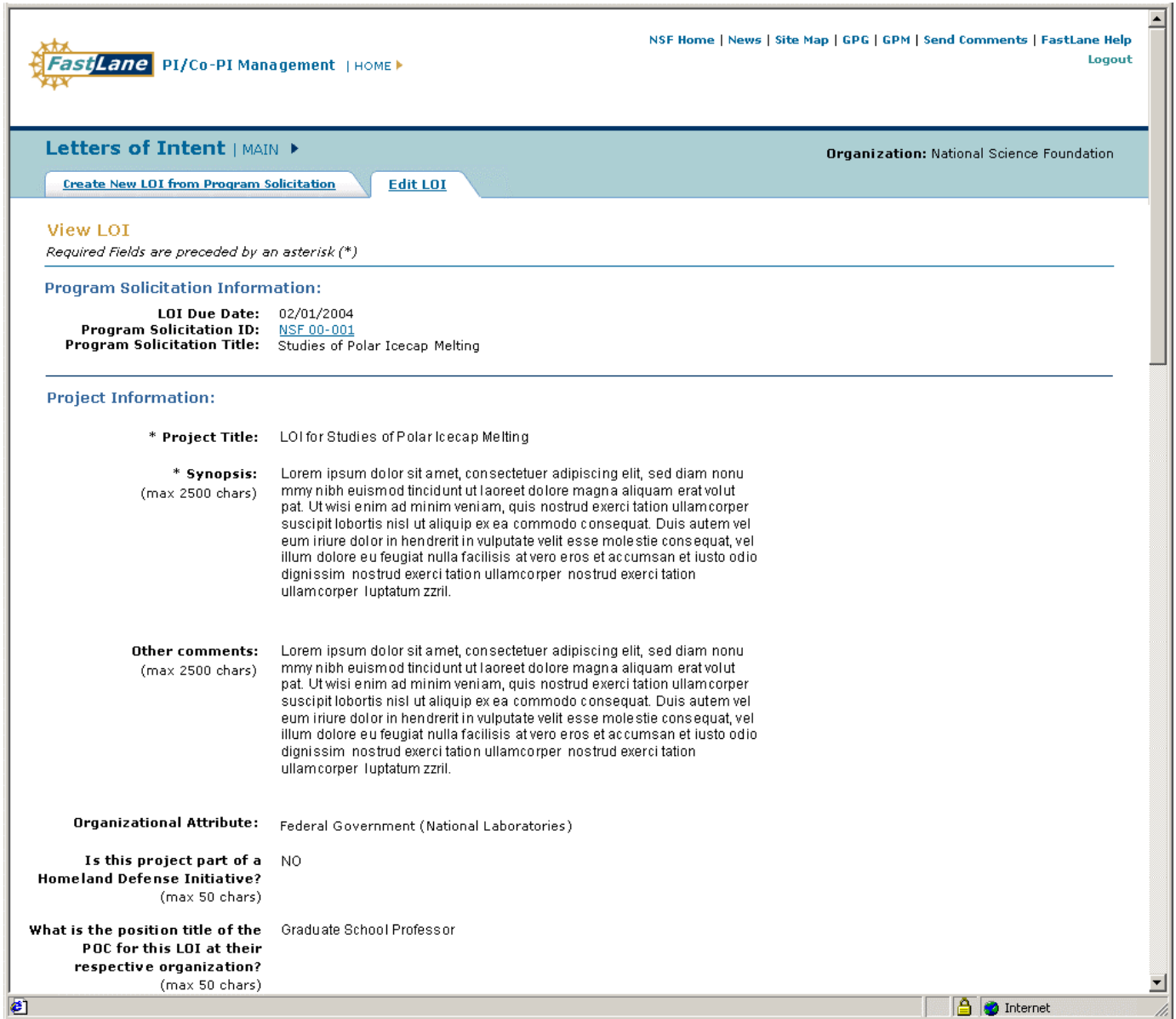


Figure 15. View LOI Page (HTML)

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).

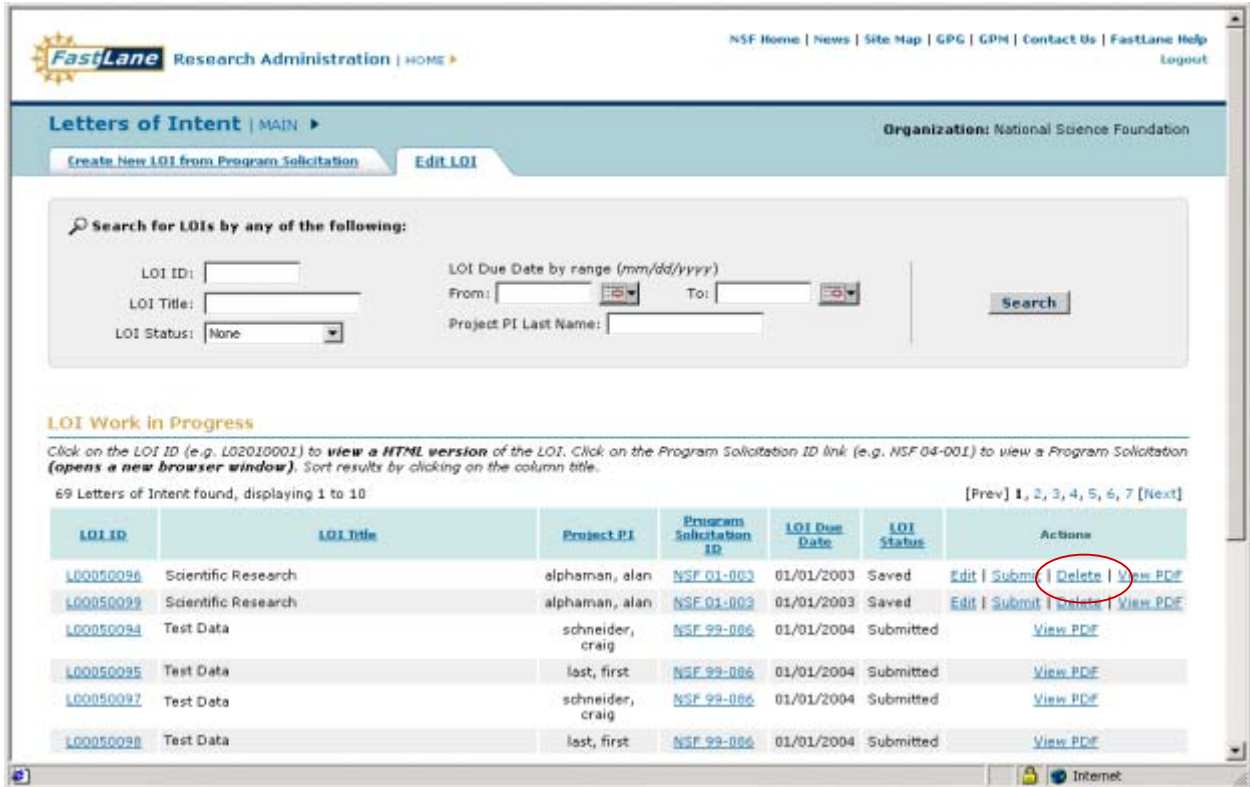


Figure 16. Edit LOI List Page

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).

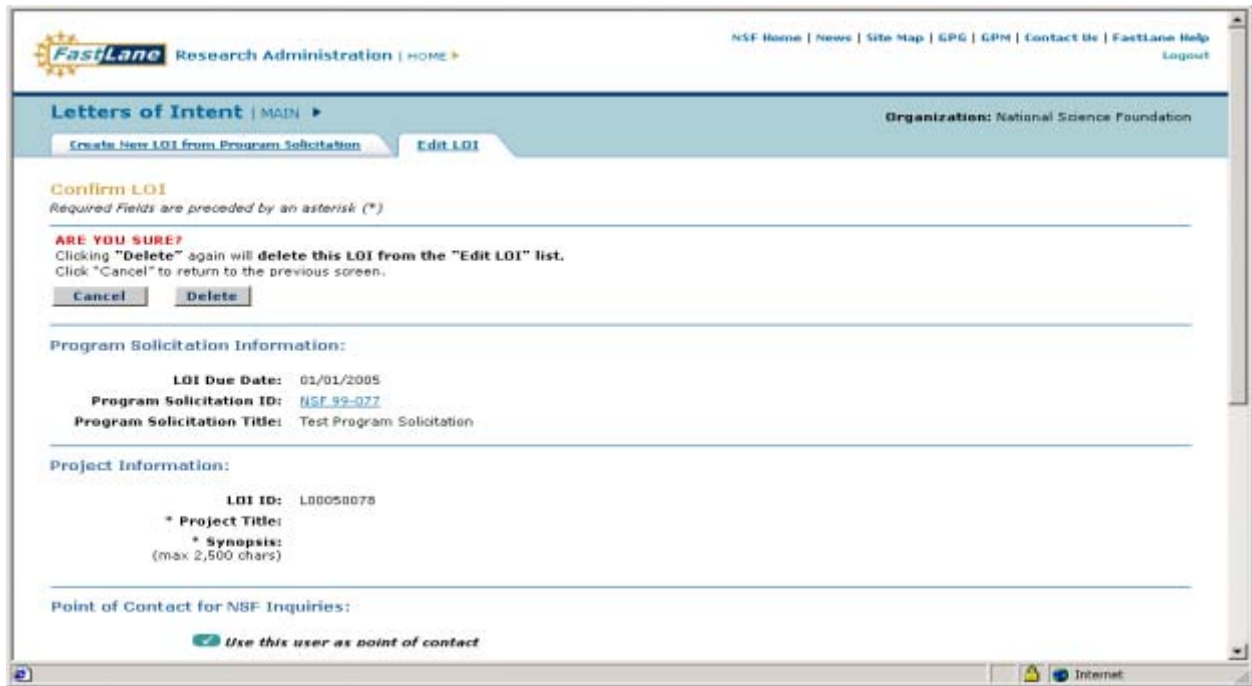


Figure 17. Delete Are Your Sure Page

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).

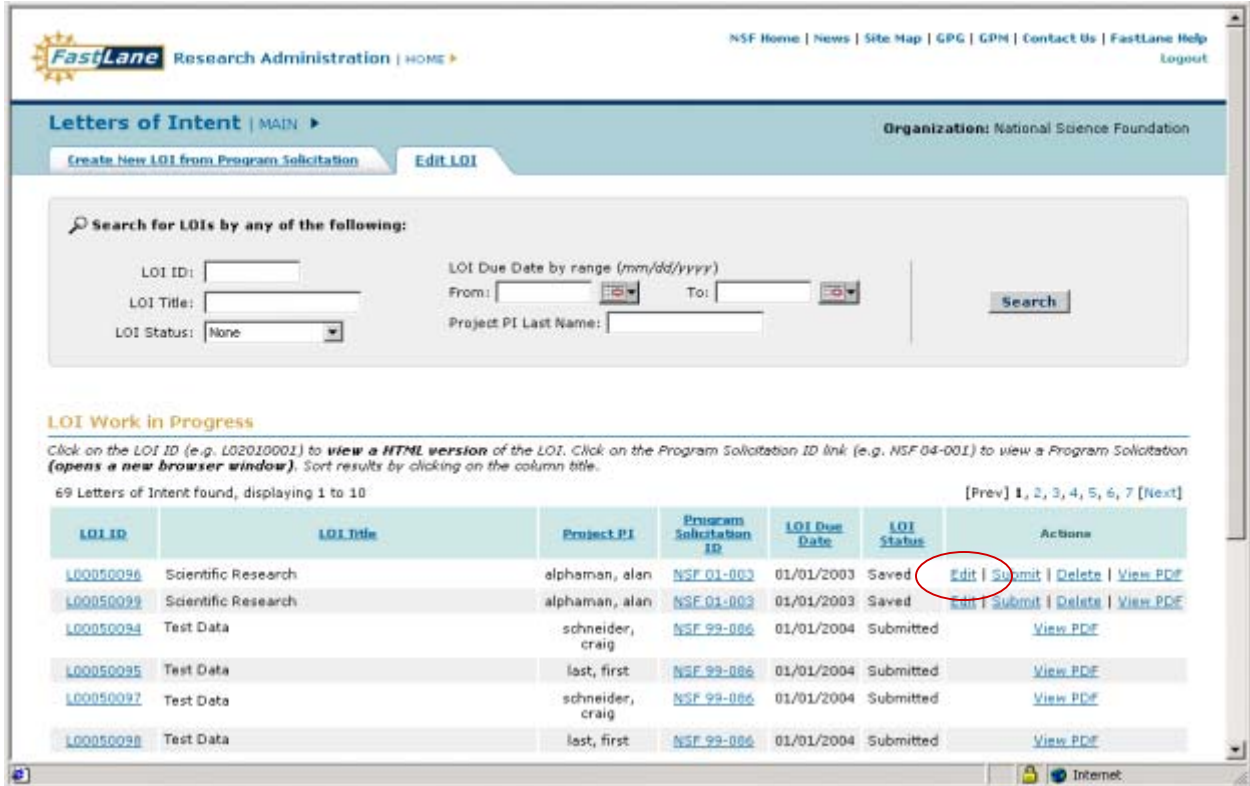


Figure 18. Edit LOI List Page

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

NSF Home | News | Site Map | GPC | GPH | Send Comments | FastLane Help
Logout

FastLane Research Administration | HOME ▶

Letters of Intent | MAIN ▶ Organization: National Science Foundation

Create New LOI from Program Solicitation Edit LOI

Edit LOI
Required Fields are preceded by an asterisk (*)

LOI ID: L00000021
LOI Due Date: 02/01/2004
Program Solicitation ID: [NSF 00-001](#)
Program Solicitation Title: Studies of Polar Icecap Melting

Project Information:

* Project Title: LOI for Studies of Polar Icecap Melting

* Synopsis: (max 2500 chars)
Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat. Ut wisi enim ad minim veniam, quis nostrud exerci tation ullamcorper suscipit lobortis nisl ut aliquip ex ea commodo consequat. Duis autem vel eum iriure dolor in hendrerit in vulputate velit esse molestie consequat, vel illum dolore eu odio dignissim qui blandit praesent luptatum zzril.

Other comments: (max 2500 chars)
Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat. Ut wisi enim ad minim veniam, quis nostrud exerci tation ullamcorper suscipit lobortis nisl ut aliquip ex ea commodo consequat. Duis autem vel eum iriure dolor in hendrerit in vulputate feugiat nulla facilisis at vero eros et accumsan et iusto odio dignissim qui blandit praesent luptatum zzril.

Organizational Attribute: Federal Government (National Laboratories)

Is this project part of a Homeland Defense Initiative? (max 50 chars)
NO

What is the position title of the POC for this LOI at their respective organization? (max 50 chars)
Graduate School Professor

If the POC is at a university, what is their area of study? (max 50 chars)
Oceanography

Internet

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)

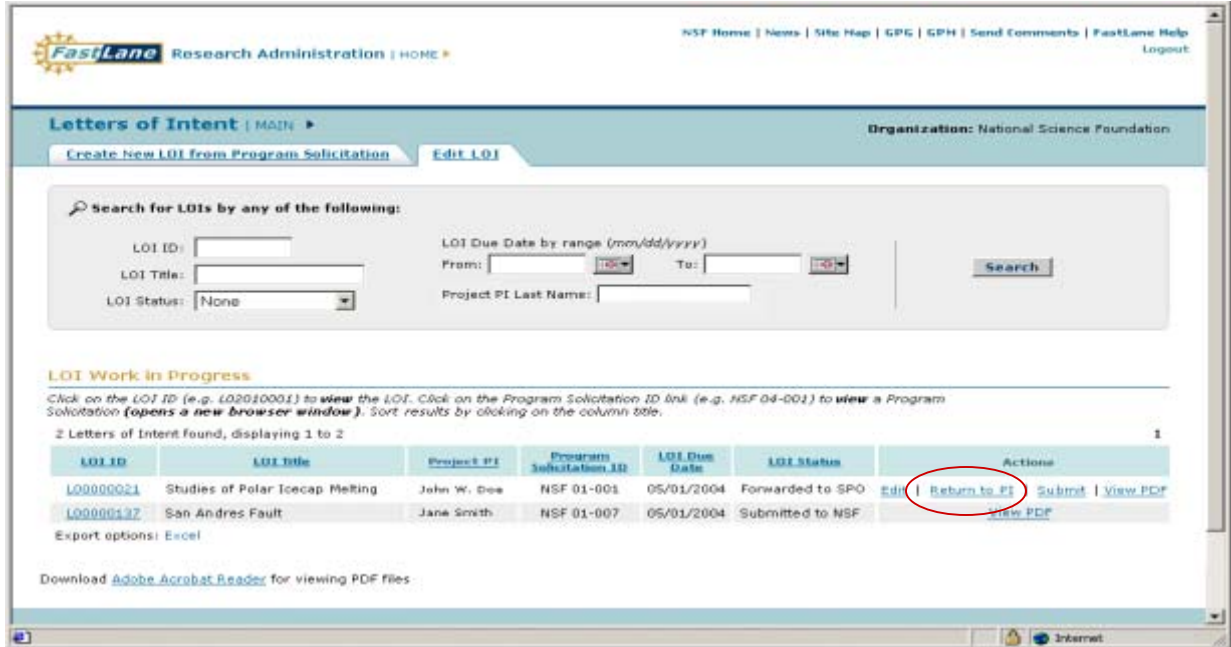


Figure 20. Edit LOI List Page

Or

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

The screenshot displays a web form titled "Point of Contact for NSF Inquiries:". It features two radio button options: "Use this user as point of contact" (selected) and "Use this (alternate) name as point of contact". The first option is populated with: First Name: Jay, Middle Initial: A, Last Name: Sebastian, Telephone Number: (703) 555-1212, and Email Address: sebastian_jay@bah.com. The second option has empty input fields for First Name, Middle Initial, Last Name, Telephone Number, and Email Address.

Below this is the "Project PI:" section with input fields for First Name (Jay), Middle Initial (A), Last Name (Sebastian), and Organization Name (NSF).

The "Cross Directorate LOI/Multi-Disciplinary LOI:" section contains three dropdown menus for Primary, Secondary, and Tertiary Divisions, all set to "DIV OF ADVANCED NETWORK INFRA & RESEARCH".

At the bottom, there are four buttons: "Cancel", "Save", "Submit", and "Return to PI". The "Return to PI" button is circled in red.

At the very bottom, there is a link to "Download Adobe Acrobat Reader for viewing PDF files" and a taskbar showing the Internet browser icon.

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.

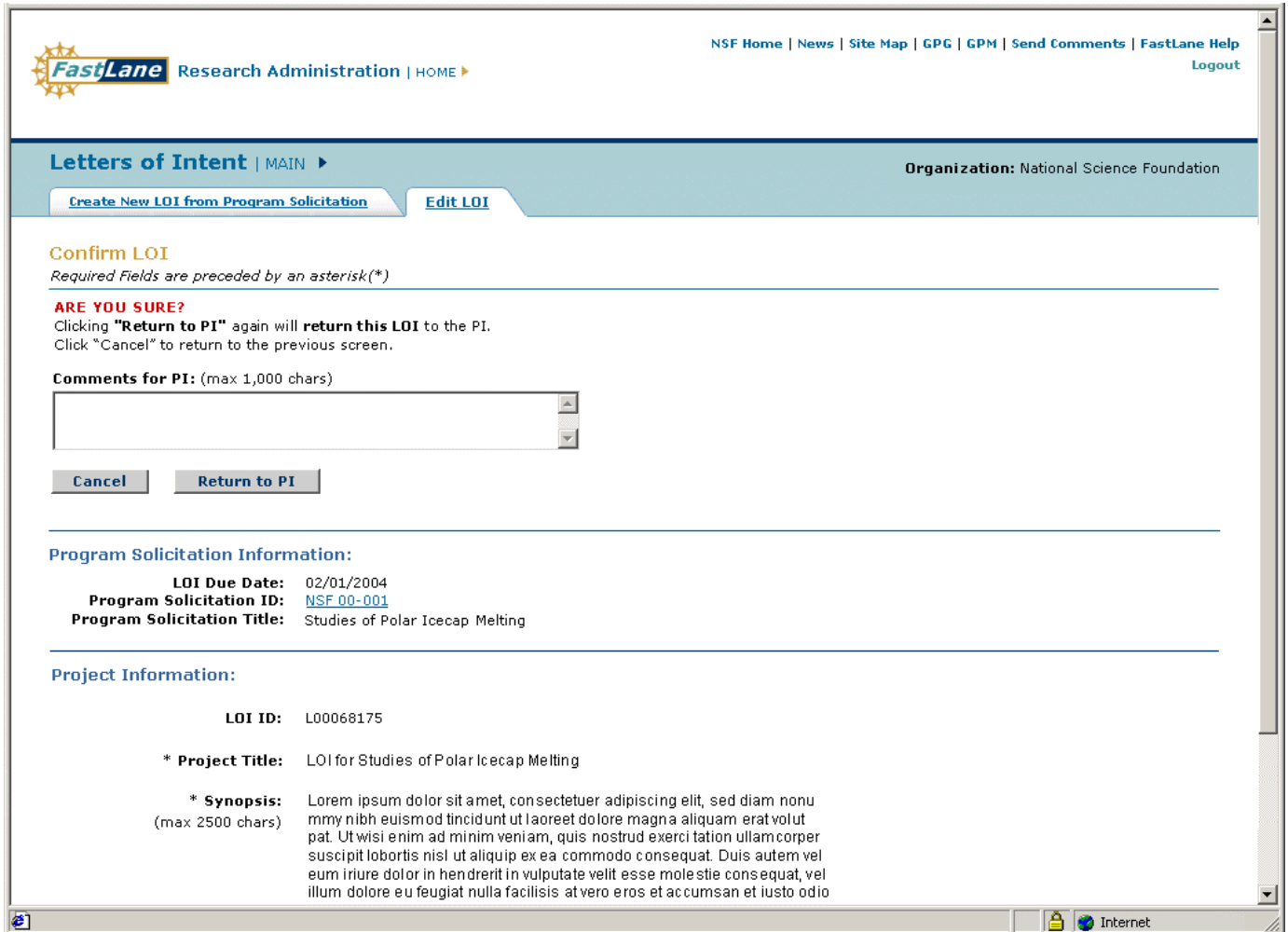


Figure 22. Return to PI Are You Sure Page

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*.

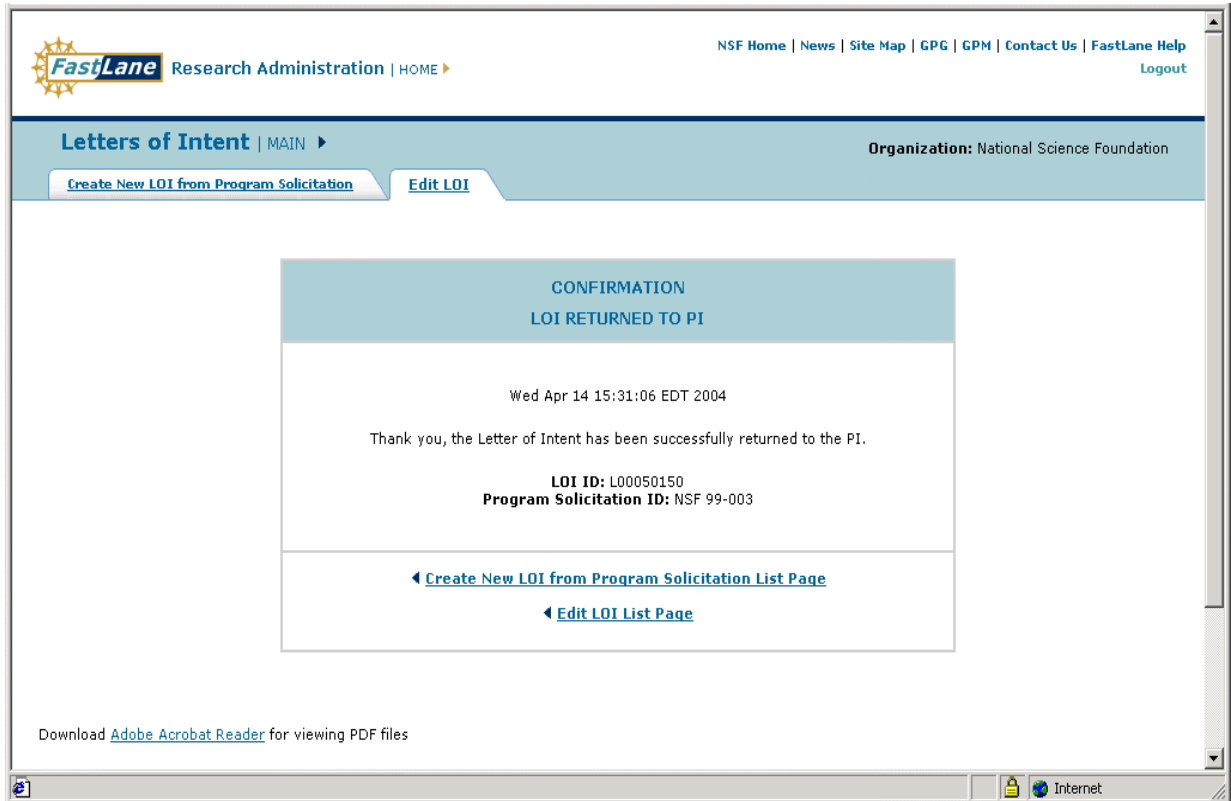


Figure 23. Returned Confirmation Page

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).

The screenshot shows a web form titled "Point of Contact for NSF Inquiries:". It has two radio button options: "Use this user as point of contact" (selected) and "Use this (alternate) name as point of contact". The first option has fields for First Name (Jay), Middle Initial (A), Last Name (Sebastian), Telephone Number (703) 555-1212, and Email Address (sebastian_jay@bah.com). The second option has empty fields for First Name, Middle Initial, Last Name, Telephone Number, and Email Address.

Below this is the "Project PI:" section with fields for First Name (Jay), Middle Initial (A), Last Name (Sebastian), and Organization Name (NSF).

Next is the "Cross Directorate LOI/Multi-Disciplinary LOI:" section with three dropdown menus for Primary, Secondary, and Tertiary Divisions, all set to "DIV OF ADVANCED NETWORK INFRA & RESEARCH".

At the bottom are four buttons: "Cancel", "Save", "Submit", and "Return to PI". The "Submit" button is circled in red.

At the very bottom, there is a link to "Download Adobe Acrobat Reader for viewing PDF files" and a system tray showing "Internet".

Figure 24. Edit LOI Page

Or

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

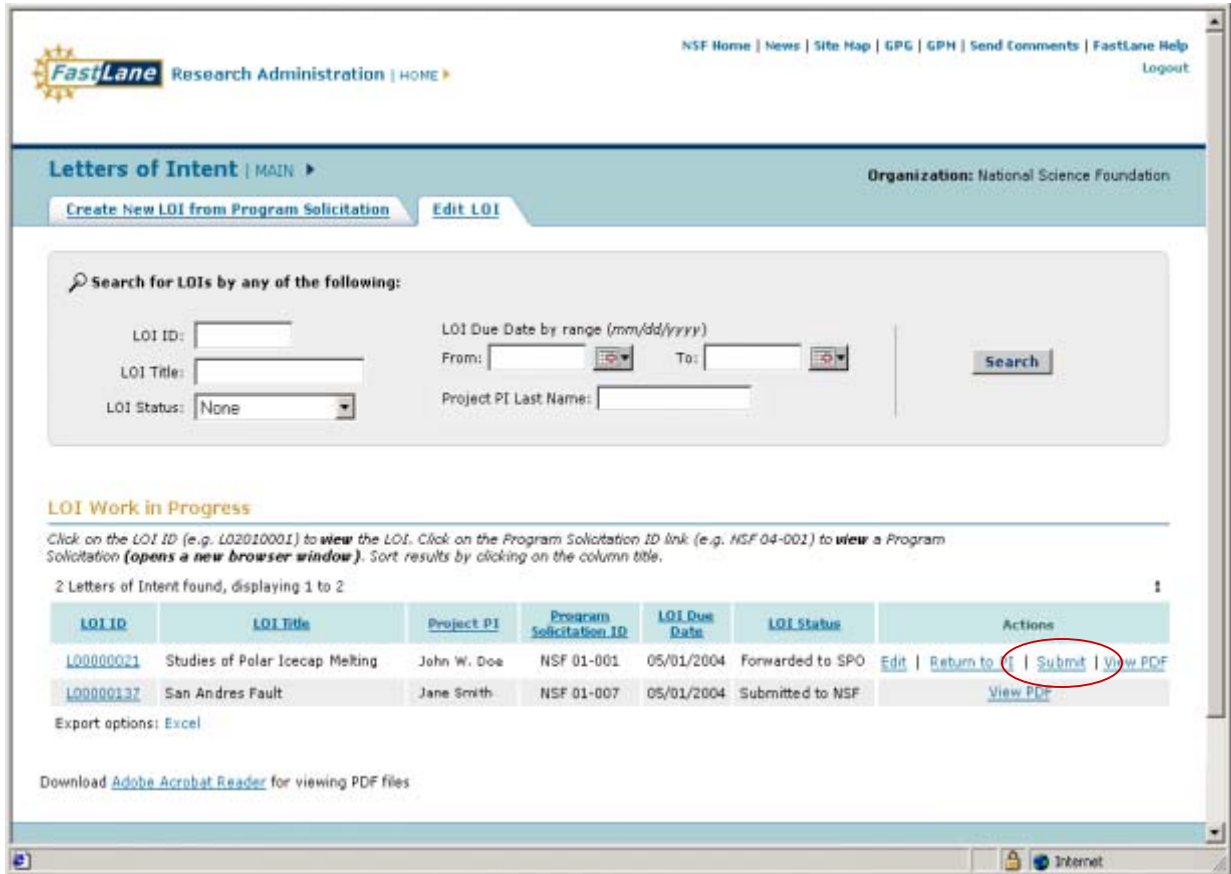


Figure 25. Edit LOI List Page

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).

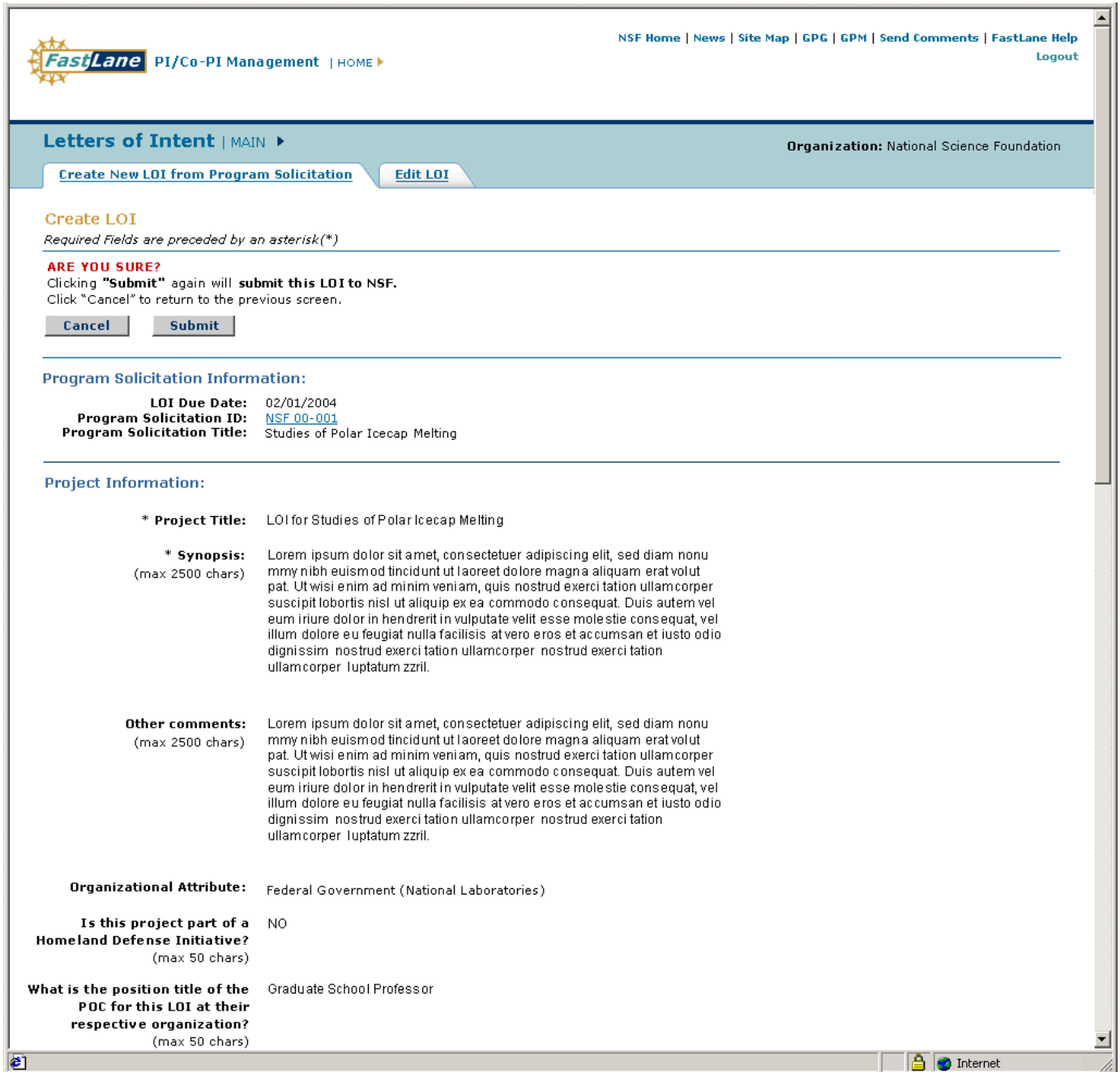


Figure 26. Submit Are You Sure Page

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*.

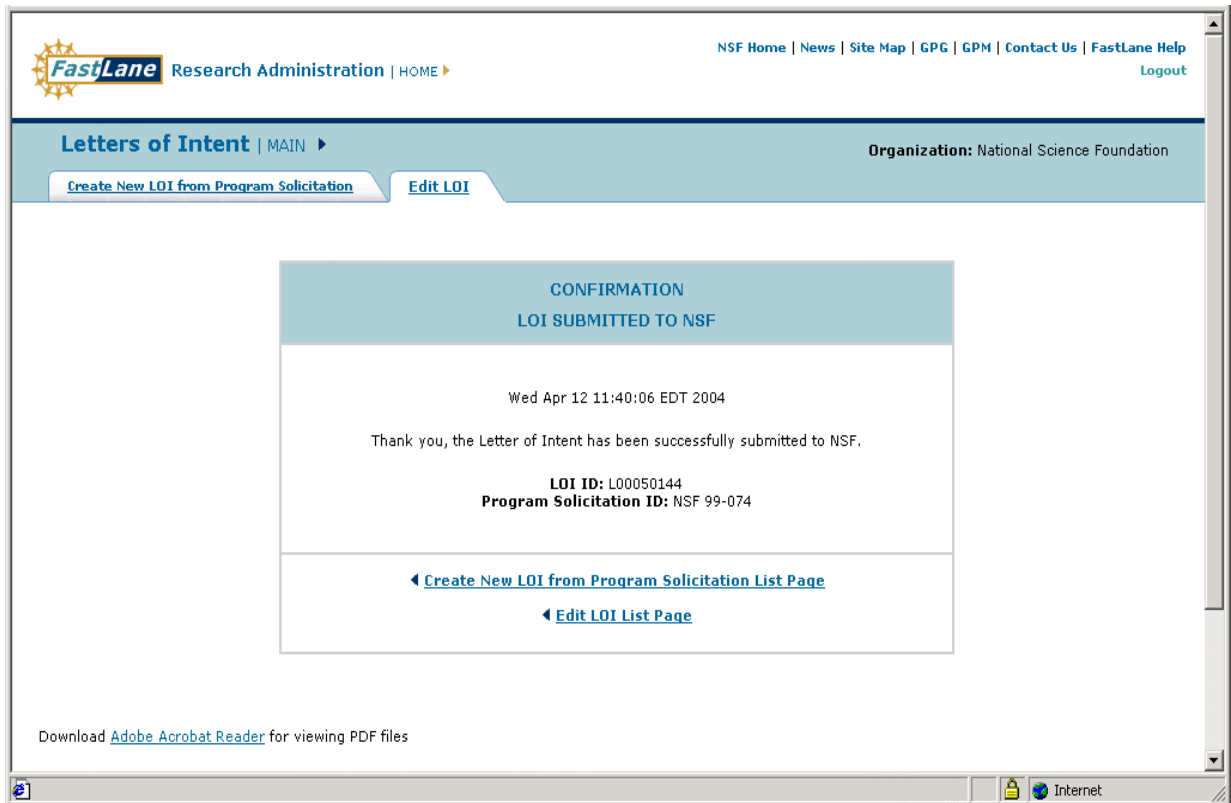


Figure 27. Submit Confirmation Page