GRANTS OFFICE
empowering communities

Getting Started with Research.gov: Preparing and Managing NSF Proposals

Webinar Transcript • March 17, 2026

Presented by Chris LaPage and Dr. Elizabeth Shay • Grants Office, LLC

Welcome and Introductions

Chris LaPage:
Hello everyone. My name is Chris LaPage, Chief Services Officer here at Grants Office, and today we will be discussing getting started with Research.gov: preparing and managing NSF proposals.

Housekeeping

Chris LaPage:
Before we get started, I've got a few housekeeping items for you. First, feel free to ask questions at any time during today's event using the Q&A interface on the bottom right portion of your screen. Submit as many questions as you'd like, and we'll get to as many as possible toward the end of the session. If we run out of time and don't have a chance to get to your question, you can email us directly at education@grantsoffice.com, which will be put into the chat for you to access.

If you don't see the Q&A box, look at the three little dots at the bottom of your screen, click there to find more interface options. From there you can select to have the Q&A and other features pop up.

Also, this event is being presented in English. However, we do have captioning with real-time translation available. To access this feature, click on the little closed caption button on the lower left-hand side of your screen. From there you'll be able to select your preferred caption language.

Finally, this session is being recorded. The recording will be available for download at the website provided for this session, and that will be put into the chat by our media coordinator Kate, including the URL so you can access the slides and all the resources we have for today's session, including that recording.

Today's Speaker and Agenda

Chris LaPage:
Again, today we're talking about getting started with Research.gov: preparing and managing National Science Foundation proposals. And with that, on to the show.

We are joined today by the august Dr. Liz Shay, Senior Consultant overseeing our education and research verticals at Grants Office. Liz has a PhD with her thesis work in brain and cognitive sciences. She has nearly two decades of experience in the grant space, having held roles on both the applicant and funder side and, certainly, the consultant side here at Grants Office. I'd like to say thank you, Liz, so much for joining us today to share your knowledge.

Again, if there are any questions for us throughout this event, please send those through the question and answer interface on your screen. We'll get to as many as possible at the end of the event. We've got a jam-packed session for you today that's going to cover a lot of wonderful information. We'll start out with talking through Research.gov — covering everything from required registrations, how to apply through the platform, common pain points, and pitfalls to avoid. We'll also briefly discuss how Grants Office may be able to help you on your grant-seeking journey, and finally, we'll close with Q&A, assuming time allows. Now, enough from me. I'd like to introduce you now to Dr. Liz Shay to discuss Research.gov and NSF application procedures. Thank you.

Introduction to Research.gov

Dr. Elizabeth Shay:
Thank you so much, Chris, and hello, everyone. As we already know, today I'm going to be talking about Research.gov. For those of you who have been around in the National Science Foundation space for quite a while, you might be familiar with FastLane. This is the newer version of that that's being used. And today we're going to talk through some of the details about how it works and how you can use it for your applications.

Research.gov in the Federal Grant Landscape

Dr. Elizabeth Shay:
When we look at the federal landscape, there are 26 federal grant-making agencies, and the National Science Foundation, or NSF, is the host of the Research.gov portal. They're also the only agency that's currently using it as their only source for application submission. Technically you can submit NSF grants through Grants.gov; however, the vast majority of people use Research.gov for NSF grants, and it does tend to be the best option to successfully submit those types of applications.

If you're interested in work that's happening with other agencies and how to submit applications there, last month we did an event on Grants.gov and understanding Grants.gov. Definitely check that one out, because that talks a lot about that particular portal and how it's used for a variety of different grantmakers in the federal space.

What You Can Do on Research.gov

Dr. Elizabeth Shay:
When we look at Research.gov, this is the main page that will be used for your NSF preparation and submission of applications. You'll also be able to check your proposal status, join review panels, see documents related to awarded projects, apply for funding and awards, and nominate others for fellowships and awards.

We're going to not talk about all of these things today, but know that there's a lot of stuff going on in the Research.gov space, so definitely it could be something that's worth wandering around if any of these non-proposal-related things are of interest to you. What exactly you would have access to and what you might be using is really dependent on your specific role at your organization.

You'll also see that you can do some other financial kinds of things on the Research.gov portal. This is where you find and manage your financial information for your existing awards, do administration for your organization, and see highlights from the National Science Foundation. These are sections that your Office of Sponsored Programs or other grants managers tend to use. If you are one of those, you might be familiar with this space. If you aren't, you probably are not playing in this area too much. For today's conversation, we're going to be focusing on the application process specifically, so we're not going to be talking about this side of things and the post-award management.

Navigating the Portal

Dr. Elizabeth Shay:
When you first log into the portal, you're going to find lots of different categories of things that you might be doing. I already talked a little bit about those categories, and you see a little bit of a different format once you log in. For today's conversation, we're going to be focused on the proposals section specifically.

When you look at the proposals section, there are a few different areas that you might be interested in. You might want to prepare and submit your proposals. You might want to use their demo site for this, or you might want to check proposal status. If you're unsure about any of these things, definitely the best places to start are the help area — which you can see up in the top right of the page where there's a help section — and the demo site.

The demo site lets you basically mock up what it would look like to prepare your proposals before you do it in practice. It can be a training opportunity if you're not super familiar with the portal, before you figure out all the details of what you're going to be doing. As a note, the demo site can only be viewed if you are logged into the Research.gov portal. And then the other thing to keep in mind is that the demo site does not work with all browsers, so if it's not loading and you just get a little screen of that loading

window for a really long time, you may want to try a different browser and see if you can get it to work better in that particular space.

When we go into the help section that I mentioned, you're going to see a lot of different categories for information. There's a lot of detail here about how you use Research.gov for various different kinds of things, including finances and how you're going to look at results. For today's conversation, because we're talking about proposal preparation, that proposal preparation and submission category is really going to be where you want to focus most of your look at the help topics. It talks about all the other major things as well, so if you're ever curious, it's definitely a good place to start if you're stuck on something. They have a lot of information there.

The Prepare and Submit Proposals Section

Dr. Elizabeth Shay:
When you go inside the portal, the first thing you're going to do when you're getting ready to do this for real is to prepare and submit your proposals. The demo site looks very similar as well. Inside Prepare and Submit Proposals, you can start a new proposal, you can work on one that's already in progress, or you can view submitted proposals and updates on their status.

What you're going to select is going to be based on the requirements of a specific grant program and where you are in the process. You can see there's a little blue box up toward the top of the screen that notes only users with a PI role can prepare new proposals, and only users with a PI, Sponsored Projects Office, or Authorized Organizational Representative role can prepare new letters of intent. So those are definitely things to keep in mind. If you don't have the right role — which we're going to talk about coming up — you're not going to be able to do these things.

You can see from this page that I was on, most of the options under Prepare New are grayed out, and that's because the role I was in was not allowed to prepare new things. When you're starting something new, you're going to obviously use the Prepare New section. If you are already in progress with something, you want to look at it under In Progress so that you're not restarting things again when you already know what you're doing.

It's also really important to note that there is no place on Research.gov to figure out what grants you want to apply for. You're going to need to do that elsewhere before you dig into this particular portal. NSF.gov does have the grants that they're proposing and things that you can apply for. You can also look at Grants.gov, or you can use Grants Office services to help figure out what grants you want to apply for. Then you can view that grant's guidance on the program page so that you know what you're going to need to do once you get into the Research.gov portal. I already mentioned our webinar last month about Grants.gov — that also has some information there about how to navigate that website.

With that, we have the very basics of what Research.gov is. So now I want to dig into the most important steps.

Required Registrations

Dr. Elizabeth Shay:
First things first, we need to talk about registrations. Before you dive into figuring out what you're going to apply for, before you dive into anything else, you're going to have to handle these registrations, as they are the key first step to make your organization even capable of applying for any grants through Research.gov.

Two Systems: SAM.gov and Research.gov

Dr. Elizabeth Shay:
Things to know while you're doing the registration process. First off, there are two systems that you're going to have to keep in mind. If you're applying for an NSF grant opportunity, you must be registered with both SAM.gov and Research.gov. The registration with SAM.gov must be done first. These registration steps are sequential. You need a Unique Entity Identifier, or UEI, through SAM.gov before you can register in Research.gov. In order to even set up your account fully, you're going to need that information. So make sure that you've already registered in SAM.gov.

Information across the systems is going to need to match exactly — things like your legal business name, entity details, et cetera. If you ever mess anything up in that process, it kind of all falls apart. So definitely important to make sure that you pay very close attention as you go through these registration processes.

Something that's really important to keep in mind is that it is a slow process, particularly for the SAM.gov component. That registration process requires an annual renewal and it must be active when you're submitting, and that process can take anywhere from two to six weeks or so. So you need to start really early in the process to make sure that you have an active SAM.gov registration prior to doing anything in Research.gov.

We're going to talk a little bit about roles coming up in the future, but roles are assigned in Research.gov, and each of those have specific access and permissions. So you're going to need to update and maintain these roles with intention to make sure that you actually can do the things that you need to be able to do.

Starting with SAM.gov

Dr. Elizabeth Shay:
As we start out this process — I've gone through it at a high level, but digging in a little bit more — we need to start with SAM.gov. Start on the SAM.gov homepage, make sure that's where you are, and click on Get Started. This is going to start the registration process.

If you think your organization might already be registered in SAM.gov but you aren't sure, or you're just curious and want to save your fiscal office or leadership a question, you might want to click the search option to do some investigating. If you want to talk with your internal folks as well, that can also be a good option to learn more information about who to talk to.

As you go into search, you're going to want to enter the name of your organization into the search bar. For example, I did this with Grants Office, and we have an active registration within SAM.gov. We can also, from this page, view our UEI number, and then we can click into the organization name to get some more information.

If you have more than one option here — which does happen sometimes, particularly at larger organizations — it's even more important that you connect with your organizational leadership, or, if you're a university or similar, an Office of Sponsored Programs, to make sure that you are ultimately registering through Research.gov with the correct entity and the correct UEI information.

When we click through for even more information, one of the really key things we can get is the primary point of contact associated with the specific organization. This is who you should be contacting with regards to questions about SAM.gov, or to get you started on the process of getting registered with Research.gov. This search could come up empty, so then you need to check with your fiscal office or your leadership to ask about what the appropriate party is to register for your accounts, to make sure that you have all those pieces in place appropriately prior to trying to do anything in Research.gov.

Registering on Research.gov

Dr. Elizabeth Shay:
Once you've figured it out and you know what UEI you need to focus on, next you need to look into the Research.gov registration process. This starts out pretty simply by going to Research.gov and then clicking the Register button in the top right corner of the page, and this will get you started on the process.

Once you have set up a registration — making sure that you include the correct UEI and that you give your personal information and details, set up a password, and all of those kinds of things — you're going to find that most of the website is locked out for you. There are going to be little lock icons next to all the things you cannot do. Things that you can do would be things like looking at the demo site.

However, the vast majority of things, including submission of proposals, will be locked out for you until you have added a role.

Adding a Role

Dr. Elizabeth Shay:
You should coordinate with your organization administrators for this process to make sure that you do the correct registration roles and then they can approve things. Most people are going to be clicking the Add Investigator or Authorized User role. If you're a Sponsored Programs Officer or similar, you might be on the organizational role side of things.

To get started, if you're doing the Add Investigator or Authorized User role, you're going to click into this and then you need to select your appropriate role. If you're leading research projects, you're likely to be a Principal Investigator or Co-Principal Investigator, and you're going to want to select that option and then hit Submit.

Once you've hit Submit, you're going to want to talk to your organizational representative to make sure that they go into Research.gov and approve you for that role. That's a super important process, because until you are approved, you won't have that role in Research.gov.

That approval process, once they say Approved, usually takes around 30 minutes to update back into your account. So definitely this is another space where you want to make sure to give yourselves time to prepare these kinds of applications and these components, prior to trying to sprint to the finish line on getting a specific application submitted.

Applying via Research.gov

Dr. Elizabeth Shay:
Now that you have a role, it's time to think about how to apply via Research.gov. Going back to this page that we started at earlier, you're going to want to click that Prepare and Submit Proposals option, and then you're going to want to select the right choice under Prepare New.

Selecting the Right Proposal Choice

Dr. Elizabeth Shay:
In most instances for NSF grants, you're going to want to submit a full proposal, but there are also opportunities where you may need to submit some of these other options. It's really dependent on the specific grant. In order to make sure that you make the correct choice, you're going to need to know what grants you're applying for, and you're going to need to have read the RFP or application guidance so that you know for sure exactly what you should be selecting for each stage of the process. It's really

important that you get this right, because if you don't, you're not going to have any of the correct information in the portal.

Once you've clicked through there, you're going to then have to select a funding opportunity under that Step One, and then you may have some choices about which specific directorate you apply for, which shows up under Step Two. Many grant proposals only have a single directorate associated with that specific program, so you might not have a lot of options. But you're going to want to click through that process to make sure you're selecting things correctly based on the specific branch that you're applying for.

Selecting the Correct Proposal Type

Dr. Elizabeth Shay:
The next complex step is making sure that you select the correct proposal type. In most instances under the National Science Foundation, you're going to be submitting a research grant proposal, but you might have other types of things that you're working on, depending on specific types of projects. For example, you might be proposing a conference, or research infrastructure. Make sure you select the correct type here as well.

Which options are available is going to be dependent on the specific grant that you're applying for. For example, in this instance, I selected Improving Undergraduate STEM Education as my grant funding opportunity, so you can see that SBIRs, for example, are not opportunities under there, but there are a lot of other options. It's really dependent on the specific opportunity, but in most instances, you're going to be submitting a research grant. This is another place where if you choose the wrong option, you're going to end up with the wrong forms. So make sure to get it correct at this point.

Final Proposal Details

Dr. Elizabeth Shay:
Your last step is to fill in a couple of proposal details. First off, you're going to need to select the type of proposal that you're submitting. Again, the most common one is going to be a single proposal, but there are potentially situations where you might be submitting a collaborative proposal where multiple organizations will each be submitting their own proposals working on a unified project. If that's the case, make sure to select the right option, but in most instances, it's going to be a single lead organization submitting a single proposal.

You will also need to fill in your proposal title here, so make sure you've thought about that before you get to this point. This is a really good point to remind you as well that when you're getting to the point of actually selecting to start a new proposal in Research.gov, you should already have thought through some key details about the specific funding opportunity, what type of project you're doing, and what

you're going to call said project with your project team, prior to going through these steps. So make sure that you have those proactive conversations prior to trying to do this process.

Workspace Roles

Dr. Elizabeth Shay:
I've mentioned in passing a few times the workspace roles. This is definitely something really important to keep in mind as you go through that portal and as you get things set up. The specific role that you have is going to have an impact on what you're allowed to do within that workspace or portal.

A PI or Co-PI can create an application. The Authorized Organizational Representative is the one who can actually push Submit. Your Sponsored Projects Officers will be viewing and editing the application. Other Authorized Users is another role that will have more limited view and edit capabilities, and then your administrators are predominantly the ones there to approve roles in Research.gov. So make sure that you know who is involved in what component and make sure that you have all the right people involved in your specific portal workspace. You're for sure going to need at least a Principal Investigator and an Authorized Organizational Representative to be able to get everything done. Technically that could be the same person, but in most instances this is not the same person.

Step-by-Step: How to Apply via Research.gov

Dr. Elizabeth Shay:
So how do you apply via Research.gov? First off, the administrator needs to approve roles for the PI, AOR, Sponsored Projects Officer, and other relevant parties involved in the process. The Principal Investigator should then click Prepare New and develop the appropriate proposal type. Make sure that all participants are involved in the portal once you get there. All participants should complete the application and also check the application for errors. The Principal Investigator will confirm the application is finalized and notify the Authorized Organizational Representative that it's ready to submit, and then the AOR will submit the completed application. So definitely make sure you are considering all these steps through the process and have everyone involved in their specific roles.

Common Pain Points and How to Avoid Them

Dr. Elizabeth Shay:
I want to close out today with some common Research.gov pain points and how to avoid them. There are definitely a few things to keep in mind in this process.

Registration and Annual Renewal Delays

Dr. Elizabeth Shay:
First off, registration and annual renewal delays are a huge issue. Registering in SAM.gov, as I mentioned, can take a few weeks to complete, so make sure that you have confirmed that you have an active UEI before you're trying to apply. Those renewals are not automatic, so if you're in charge of your organizational SAM.gov registration, make sure you set a reminder for yourself to do that annual renewal process.

Account Setup

Dr. Elizabeth Shay:
Also make sure your accounts are set up appropriately. Ensure that all your accounts are linked to the organizational profile through the correct UEI, and also make sure that you have roles approved by your administrator. Give yourself adequate time to make sure that happens.

Sometimes organizations can end up with folks in the wrong UEI — for example, it might be a research foundation affiliated with a university rather than the university's UEI itself, or things like that. So definitely make sure you've had the conversations to know what the correct organizational profile is, and make sure you save time to set up those roles.

Also, sometimes with the roles, things can get kind of confusing. Not everyone can start an application, not everyone can edit an application, and not everyone can submit an application. Make sure you have that internal coordination happening, and make sure everyone has the appropriate role for the part they will play in the application process.

Don't Rely on Research.gov to Find Grants

Dr. Elizabeth Shay:
Staying only in Research.gov is going to be really tricky for being successful in your grant seeking. Research.gov is really about completing your applications and then doing some post-award management. You want to search NSF.gov or Grants.gov to be able to find the grants in the first place.

Prepare New vs. In Progress

Dr. Elizabeth Shay:
Some folks struggle a little bit with Prepare New versus In Progress. It's just something really important to keep in mind. If somebody else on your research team might also have the ability to start a new application, make sure that you have checked the In Progress section and that you only have one application being set up for a single project, and you're not working on top of each other or creating more work for yourselves.

Selecting the Correct Proposal Type

Dr. Elizabeth Shay:
In terms of some of the other kinds of things, we see issues with people selecting the incorrect proposal type during the creation process. If you accidentally select Research Infrastructure when you meant to select Research, or something like that, you're not going to have the correct forms inside the portal and you're not going to be able to complete the application correctly. So make sure that you have the correct proposal type in mind when you do that setup process.

Do Prep Work Before You Start

Dr. Elizabeth Shay:
During that setup time, you also want to make sure that you do some prep work before you start that process. You're going to need to know some details about your project, as I mentioned, including things like the title before you start your application. So have those conversations early to make sure that you're prepared.

The Compliance Status Checker

Dr. Elizabeth Shay:
Another thing that comes up during the end of the process is compliance. There is a compliance status checker that you can do inside the portal, and this is an extra check that is done automatically by the system to confirm that your application is compliant. It's just looking to make sure that every form is filled in and that every spot that requires an upload has an upload. It's not checking that it's correct or that it's competitive — it's just checking that they're all there. But it's definitely important to use that information as another check on top of what your team is doing for content and areas like that, just to make sure that everything is in there where it's supposed to be.

Internal Deadlines

Dr. Elizabeth Shay:
In terms of deadlines, make sure you set an internal deadline at least 48 hours before the program is due, and aim to submit 24 to 48 hours before the official close of the program. This is because sometimes there are technical issues, and it's extremely rare that you get an extension for them. In most instances, you just are kind of out of luck if you try to hit Submit after the deadline. So make sure you give yourself time to make everything happen, and then you'll be able to confirm that it's submitted before the deadline hits.

Post-Submission Monitoring

Dr. Elizabeth Shay:
On the post-submission side of things, there can sometimes be uncertainty about where you are — has it been reviewed, et cetera. Monitor the application status in the system. Watch for direct communications from NSF in your email or similar, to be able to see exactly what's happening, and so you know where you are in the process. It can sometimes be quite slow to hear back from NSF, so it's nice to be able to check there to know how things are going.

Resources

Dr. Elizabeth Shay:
As I close out today's conversation, I just wanted to mention a few resources that we have. On the SAM.gov side, there are a couple of pages that are really helpful: the registration page, the search page, and the help page. And then on Research.gov, there are two main pages that are most helpful: registration and support. Definitely feel free to check these out after today's conversation as you start to pursue any of your Research.gov-related applications. And with that, I'm going to hand things back to Chris. Thank you.

Grants Office Services

Chris LaPage:
Thank you so much, Liz, for that incredible information. We want to thank everyone once again for taking time to join us today, and for those celebrating, we wish you a happy St. Patrick's Day.

On that note, when you need more than the luck of the Irish, Grants Office experts are available to help you every step of your grant-seeking journey. We offer everything from prospect development, project development consultation, prospecting of relevant funding opportunities for your projects, to writing, proposal review, and other services.

We also have an all-in-one platform known as Grants Office Communities, which includes a comprehensive database stocked with federal, state, and foundation grant opportunities, and a project management interface that makes it easy for you to collaborate with internal and external colleagues on your projects and grant proposals. You can sign up for a no-cost, no-obligation two-week trial by scanning that QR code.

And again, I want to call your attention, in addition to those paid resources, that we have several no-cost grant seeker support resources — like this webinar today — available on our website www.grantsoffice.com, or by scanning that QR code on the screen. We invite you to check that out. We have a lot of great stuff on there at absolutely no charge.

Q&A Session

Chris LaPage:
With that, I'd like to go ahead and get into some questions that are in the queue. We have time for maybe two questions.

Q1: What is the CAGE number?

Chris LaPage:
First question here comes from Jody S. Appreciate the question. What is the CAGE number?

The CAGE number is something that's part of the SAM.gov registration process. It's actually put together, I believe, by the Defense Logistics Agency for anyone contracting with the federal government. You don't have to do a separate application for that — the Defense Logistics Agency will review that as part of the SAM.gov registration process and assign that code. It mostly identifies the site by location for procurement processes. So at the end of the day, when you get that grant or contract with the federal government, you want to be able to actually receive those dollars from them, and that CAGE code becomes critical to that process.

Q2: Can I use Research.gov for non-NSF research grants?

Chris LaPage:
One more question here: can I use Research.gov for non-NSF research grants? Liz, I'll have you take that one.

Dr. Elizabeth Shay:
Great question. It's complicated, I think, is the short answer there. Research.gov was originally set up with a goal of supporting all research grant applications happening across the federal government, or at a minimum happening across several different agencies.

As it stands right now, NSF is the only agency that is using it as really the one-stop shop to be able to submit an application. However, we do see other agencies — for example, Health and Human Services, or HHS — some of the agencies within that department will use Research.gov for certain application components.

One of the areas where we see it most commonly used is for things like your SciENcv, or CVs. For researchers, the resumes of the research land is frequently used there as a place to submit a kind of standard-format CV across multiple federal agencies. But it's much less common for them to use it for anything beyond that, or for a full application like we're seeing with NSF. However, it could change at any point, and we might end up seeing other agencies take on more components in the Research.gov space. Thank you.

Closing

Chris LaPage:
Thank you so much, Liz. And again, that's all the questions we have time for today. If your question did not get answered, or if you think of one later, please email us at education@grantsoffice.com, and someone will be in contact. Again, thank you to our wonderful speaker, Dr. Liz Shay, for sharing her expertise today.

Remember today's session has been recorded, and along with the slides, will be available on the events resource page by the close of business today. That was dropped in the chat window so you have that link. So if you missed anything, want to share this event with colleagues or acquaintances, or want to come back later for a refresher or to cover something that was discussed on today's event, you can do so at your convenience. We hope you found today's event to be a valuable use of your time, and we look forward to seeing you on a future Grantscast. Thanks, everyone.

— End of Transcript —

Grants Office, LLC • empowering communities • Recorded March 17, 2026

About This Transcript

This transcript was generated using Webex's automatic caption feature and subsequently reformatted with the assistance of artificial intelligence. While we make every effort to ensure accuracy, errors may remain. If you notice a discrepancy, we welcome your corrections — please reach out to education@grantsoffice.com.

Live sign language interpretation is available upon request for future Grantscast® events. To request an interpreter or learn more about accessibility accommodations, please contact accessibility@grantsoffice.com.