

## 11 Letters of Intent for the SPO

This chapter is intended to be used for guidance on the Research Administration module of FastLane only. PIs should use the Letters of Intent for the PI User Guide located under the Proposals, Awards and Status section of the FastLane Help page.

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) appears.

Figure 1. Research Administration Page

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

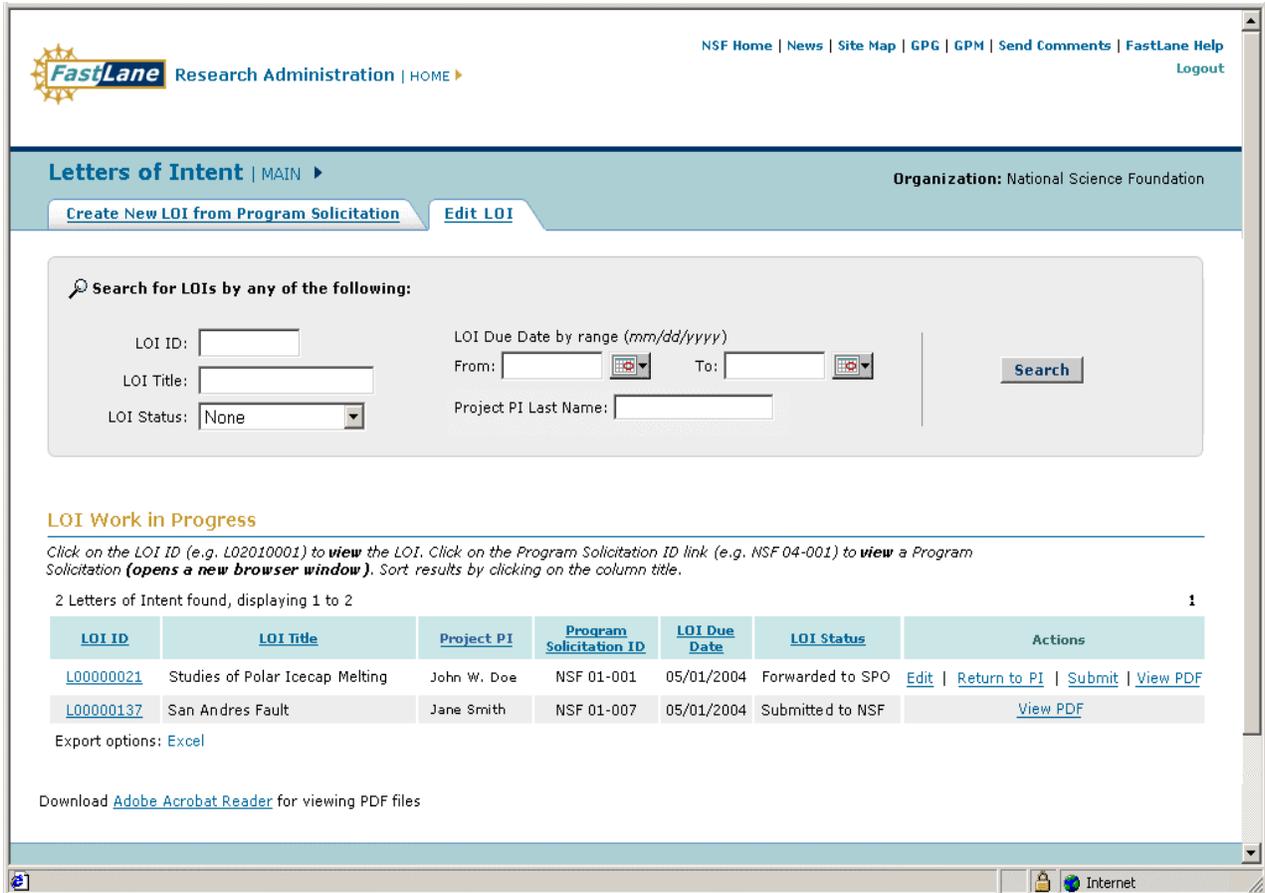


Figure 2. Edit LOI List Page

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
  - Project PI
  - LOI Due Date

- 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 14 of the User Guide)
- c) Delete a LOI. (Go to Page 18 of the User Guide)
- d) Edit a LOI. (Go to Page 20 of the User Guide)
- e) Return a LOI to a PI. (Go to Page 23 of the User Guide)
- f) Submit a LOI. (Go to Page 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) appears. The PI can search for particular solicitations by the following:
  - Program Solicitation ID
  - Program Solicitation Title
  - LOI Due Date by range (mm/dd/yyyy)
  - NSF Directorate

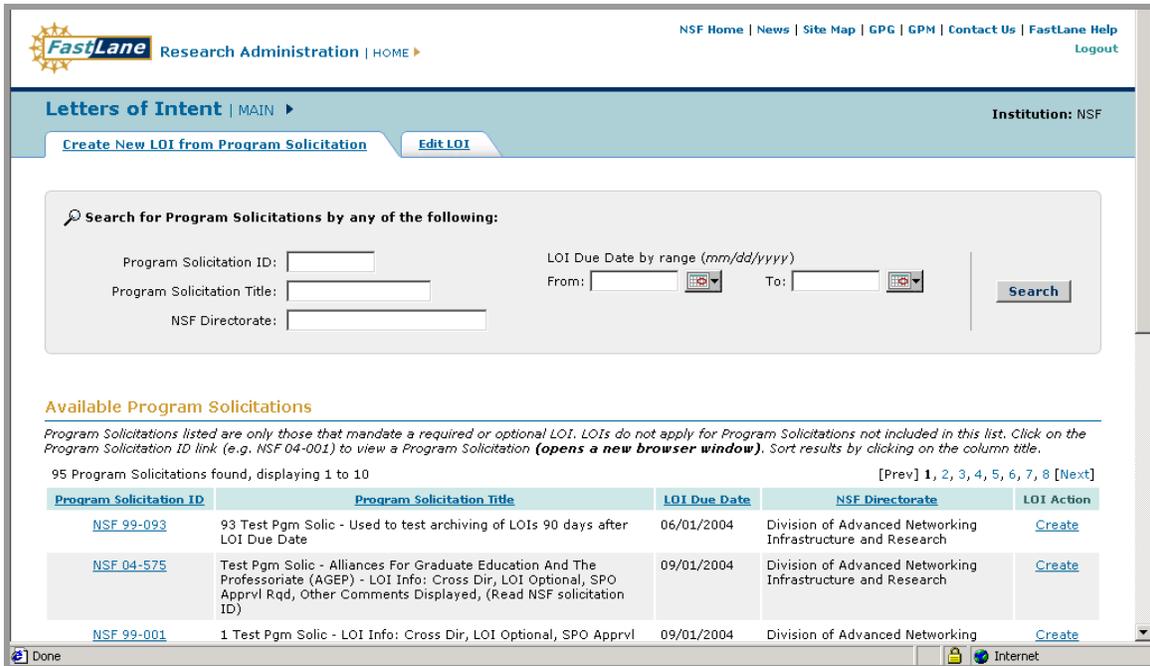


Figure 3. Create New LOI from Program Solicitation Tab

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* appears (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 no questions or up to three questions.

FastLane Research Administration | HOME

NSF Home | News | Site Map | GPG | GPM | Contact Us | FastLane Help  
Logout

Letters of Intent | MAIN

Institution: NSF

Create New LOI from Program Solicitation Edit LOI

### Create New LOI

Required Fields are preceded by an asterisk (\*)

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**Program Solicitation Information:**

LOI Due Date: 09/01/2004  
Program Solicitation ID: [NSF 99-002](#)  
Program Solicitation Title: 2 Test Pgm Solic - LOI Info: Cross Dir, LOI Optional, SPO Apprvl Rqd, Other Comments Displayed

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**Project Information:**

LOI ID: N/A  
\* Project Title:   
\* Synopsis:   
(max 2,500 chars)

Done Internet

Figure 4. Create LOI Page (top)

**Point of Contact for NSF Inquiries:**

Use this (user) name as point of contact

First Name: Jane  
 Middle Initial: J.  
 Last Name: Doe  
 Telephone Number: 703-555-1212  
 Email Address: jdoe@nsf.gov  
 Department: DIS

Use this (alternate) name as point of contact

First Name:   
 Middle Initial:   
 Last Name:   
 Telephone Number:   
 Email Address:   
 Department:

---

**Project PI:**

First Name:  Organization Name:   
 Middle Initial:   
 Last Name:

---

**Cross Directorate/Multi-disciplinary LOI:**

Primary Division:   
 Secondary Division:   
 Tertiary Division:

---

**Other Senior Project Personnel:**

Personnel Name   
 (Click "Add Personnel" below)

(Min of 1 required for this LOI, Max of 4)

**Participating Organizations:**

Organization Name   
 (Click "Add Organization" below)

(Min of 1 required for this LOI, Max of 4)

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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

Internet

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 are created by the PO and are customized for the solicitation. There may be no questions or up to three 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* appears (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:   
Middle Initial:   
\* Last Name:   
\* Organization Name:   
\* Department:   
\* City:   
\* State:   
\* Country:

[Return to Form](#)   
(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	<a href="#">Edit</a>   <a href="#">Delete</a>
Miracle, Jane	<a href="#">Edit</a>   <a href="#">Delete</a>

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Tel: 703-292-5111, FIRS: 800-877-8339 | TDD: 703-292-5090

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**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 appear under the Other Senior Project Personnel list.

The screenshot displays 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:" and "Participating Organizations:". The "Other Senior Project Personnel:" section contains a table with two rows: "John W Doe" and "Jane Miracle". Below the table is a button labeled "Add/Edit Personnel" with the text "(Min of 1 required for this LOI, Max of 4)" underneath. The "Participating Organizations:" section contains a text input field for "Organization Name" with the text "(Click 'Add Organization' below)" underneath. Below the input field is a button labeled "Add Organization" which is circled in red. Below the button is the text "(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 includes the National Science Foundation logo and contact information: "National Science Foundation, 4201 Wilson Boulevard, Arlington, Virginia 22230, USA, Tel: 703-292-5111, FIRS: 800-877-8339 | TDD: 703-292-5090". There is also a "Privacy and Security" link and an "Internet" icon in the bottom right corner.

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* appears (Figure 8).

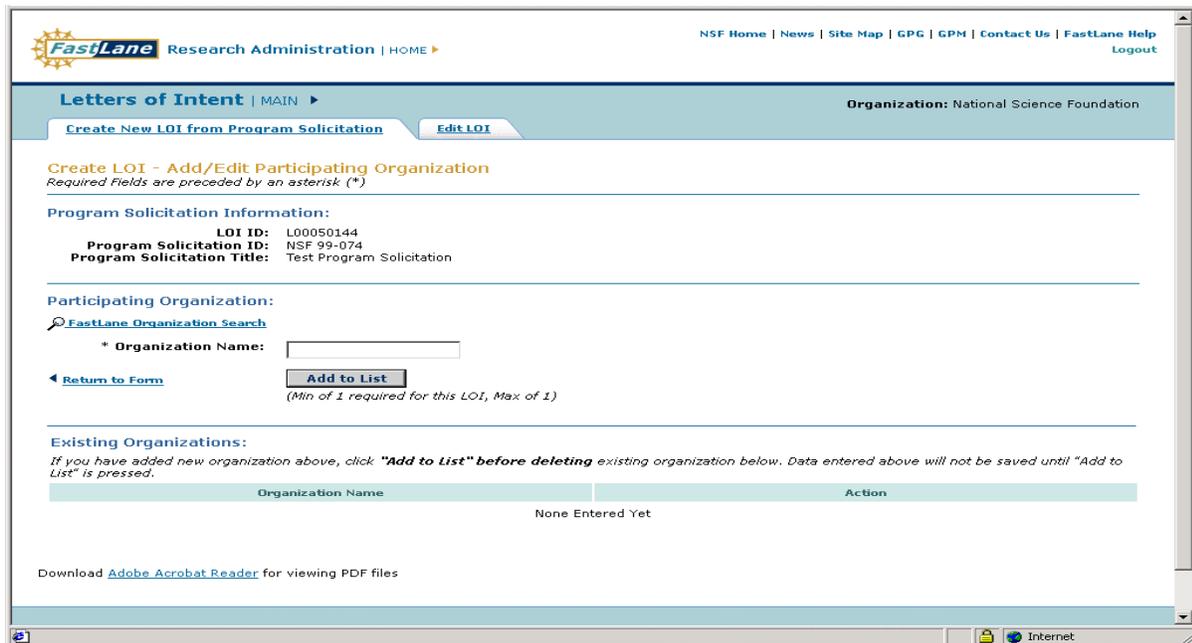


Figure 8. Add/Edit Participating Organization Page

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).

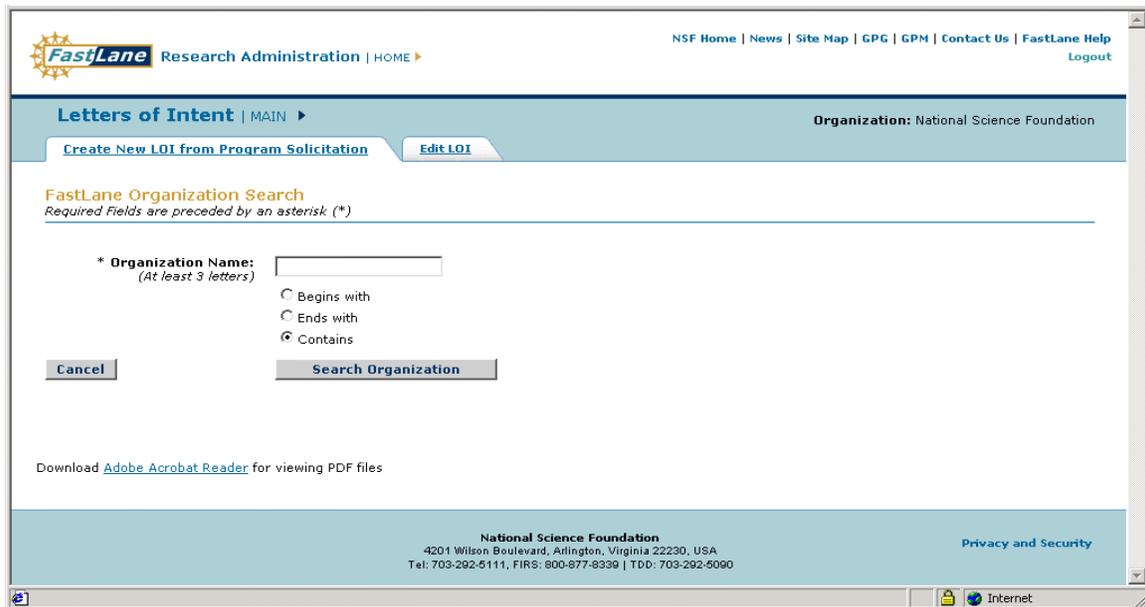


Figure 9. Organization Search Page

- a. Enter at least three letters of the organization you wish to locate and click on 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).

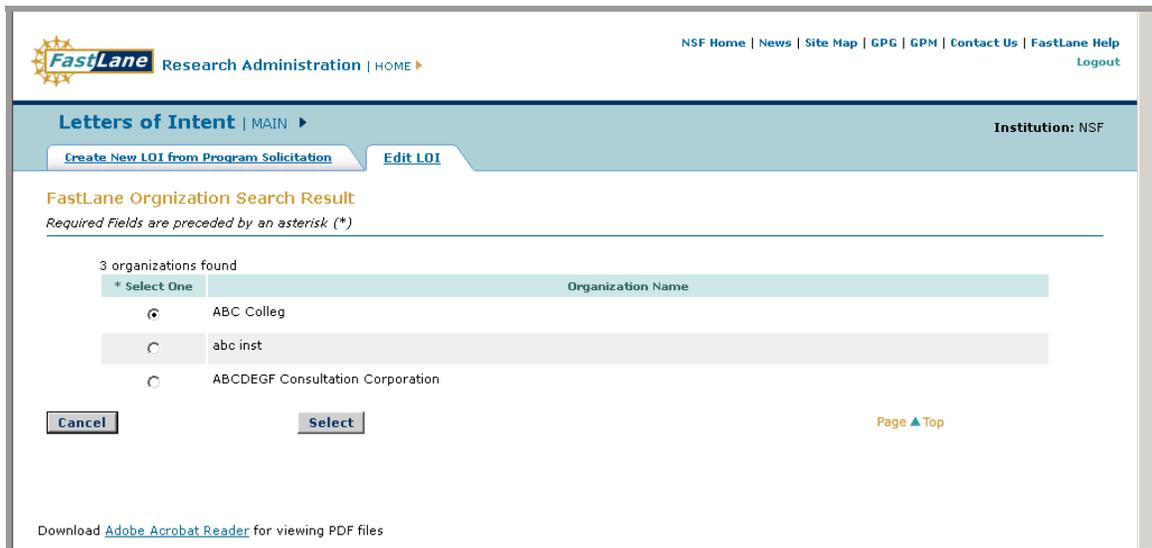


Figure 10. Organizational Search Results Page

- d. Click on the radio button of the organization that meets your search criteria and click on **Select**.
  - e. The Organization Name appears in the text box on the *Add/Edit Participating Organizations Page* (Figure 8). Click **Add to List**.
22. The *Add / Edit Participating Organizations Page* appears with the added organization displayed at the bottom of the page (Figure 11).

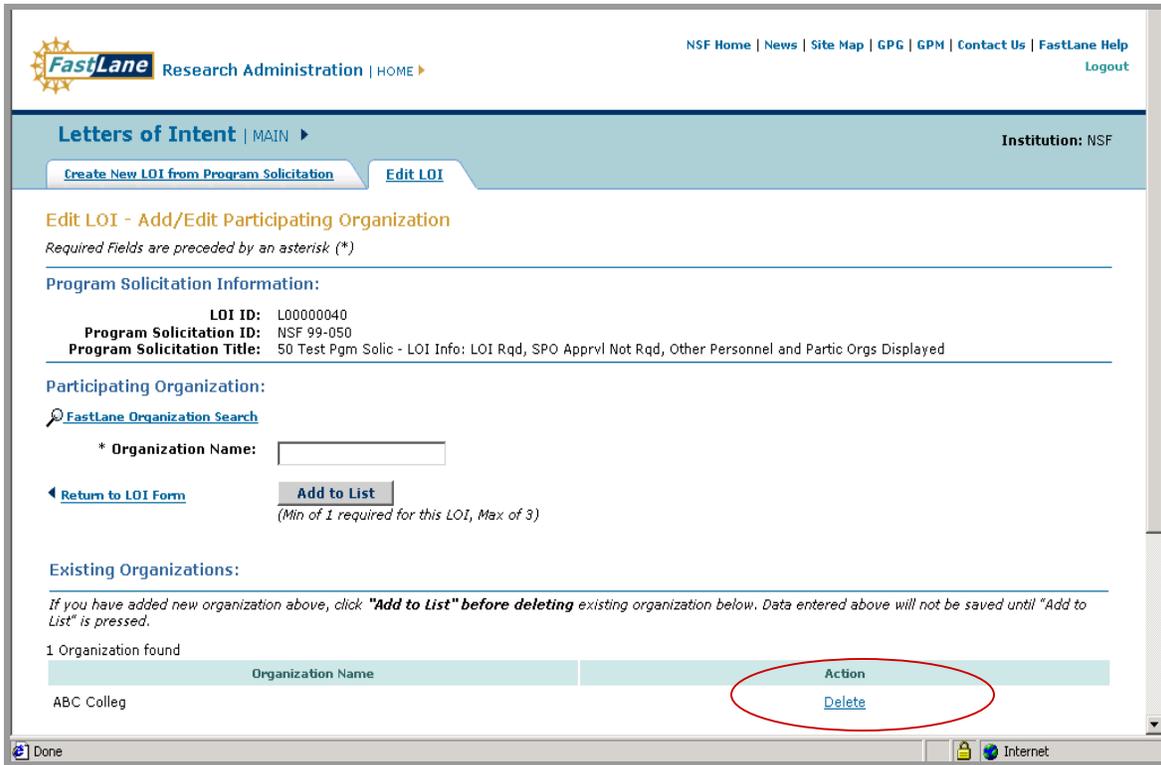


Figure 11. Add/Edit Organizations Page

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 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 3 in the User Guide.

Or

Click **Submit** to submit the LOI to NSF. Go to Submit a LOI Section on Page 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*.

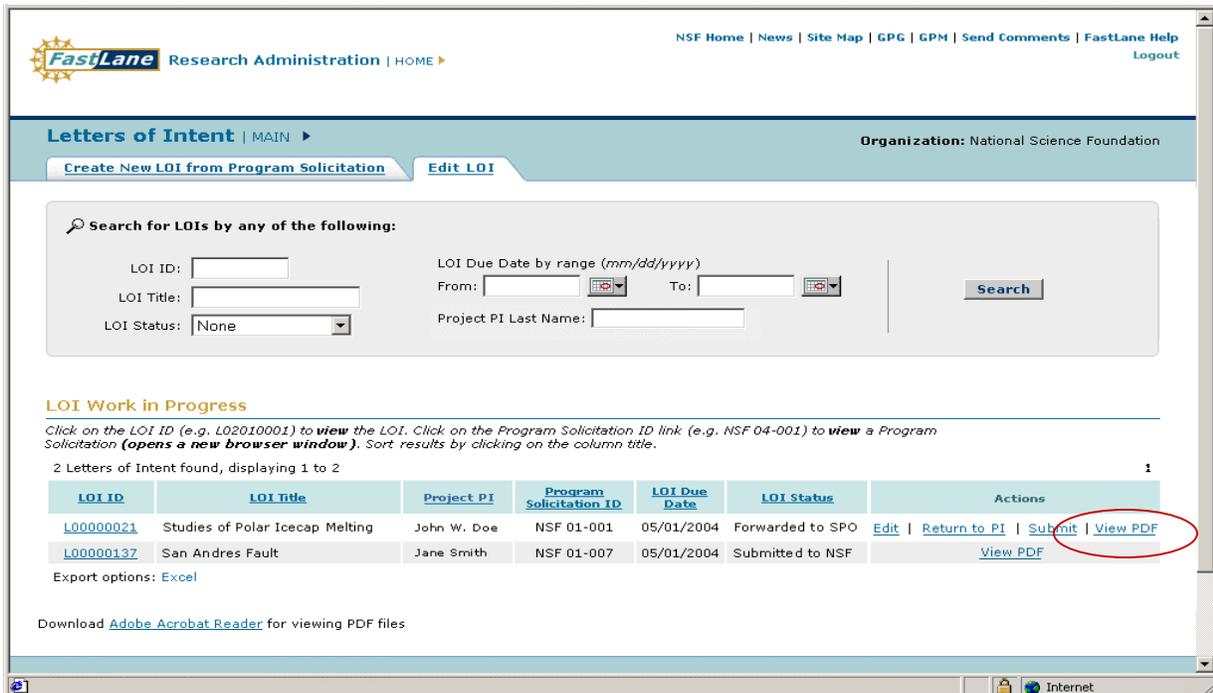


Figure 12. Edit LOI List Page

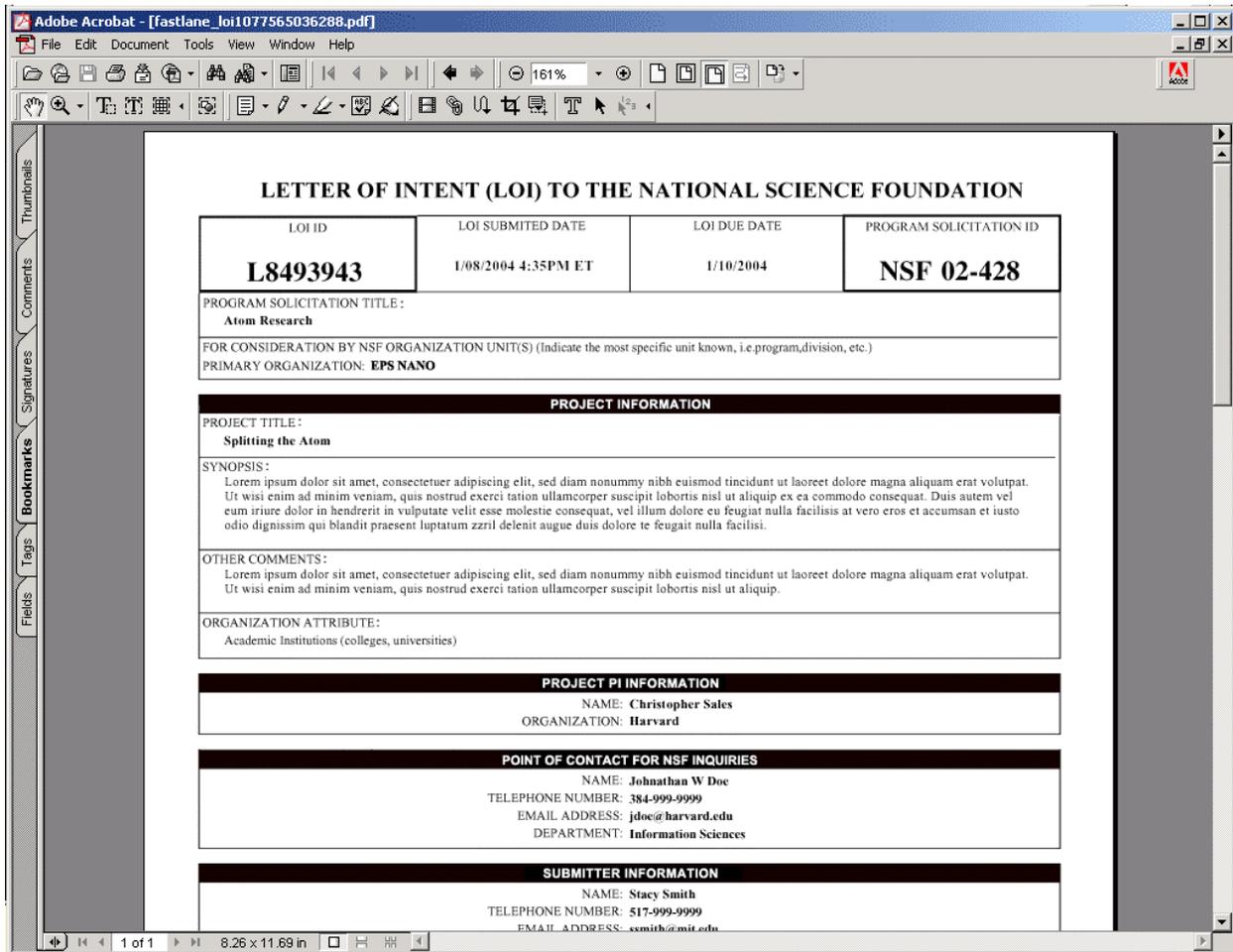


Figure 13. LOI PDF

- 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).

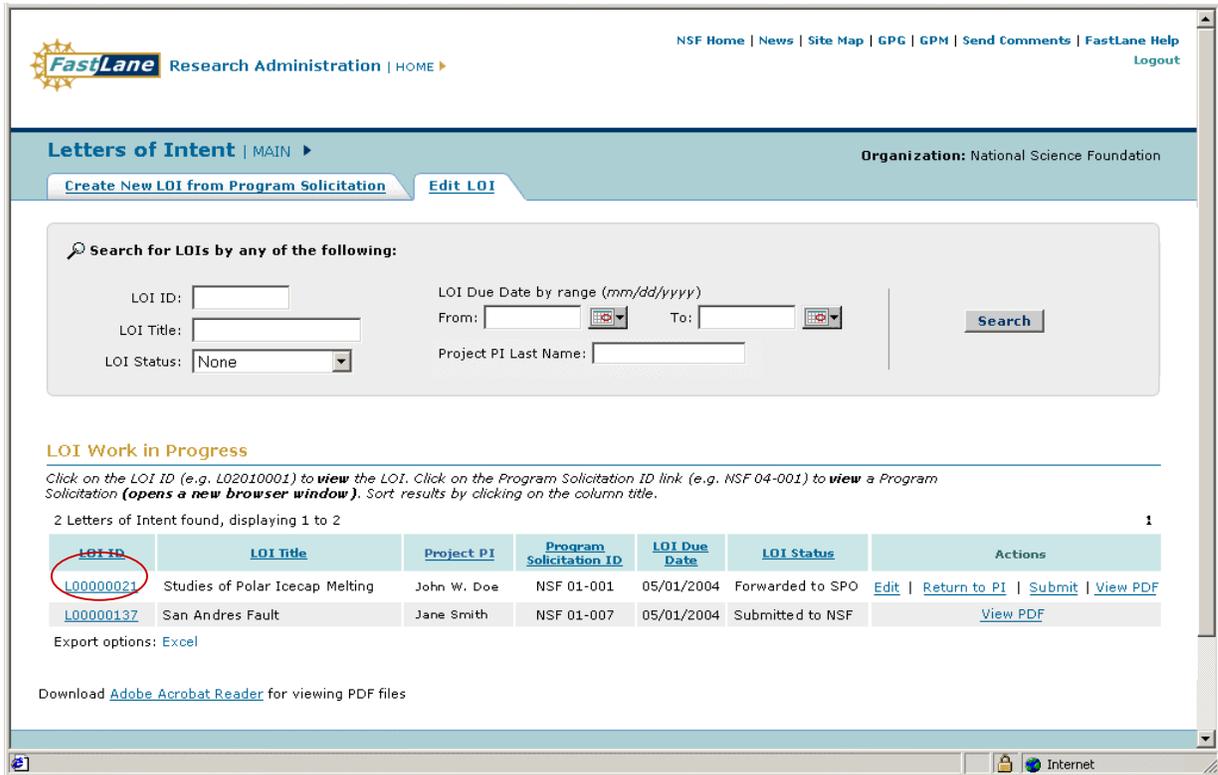


Figure 14. Edit LOI List Page

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

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Letters of Intent | MAIN ▾

Institution: NSF

Create New LOI from Program Solicitation Edit LOI

◀ [Return to Edit LOI list](#)

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**Program Solicitation Information:**

**LOI Due Date:** 09/01/2004  
**Program Solicitation ID:** [NSF 99-001](#)  
**Program Solicitation Title:** 1 Test Pgm Solic - LOI Info: Cross Dir, LOI Optional, SPO Apprvl Rqd, Other Comments Displayed

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**Project Information:**

**LOI ID:** L00000029  
**\* Project Title:** Organizational Theories of Management  
**\* Synopsis:** The unifying goal of this project area is to develop approaches for better understanding the causal linkages and other critical relationships associated with human and social dynamics. Both empirical and formal-theoretical approaches are relevant, as are models that combine approaches. To encourage synergies of this sort, Boston University will emphasize modeling interdisciplinary Organizational theory research activities that will incorporate at least one the following modeling approaches: Theoretical approaches that build on mathematical representations that include (but are not limited to) ideas from game theory, adaptive (least squares) and Bayesian learning, structural equation models, dynamic stochastic modeling, and dynamical system approaches. Innovative empirical approaches that include (but are not limited to) applied statistical procedures or experimental procedures. The direct linking of theoretical approaches with experimental or empirical tests. This includes the development of new and better models through an interactive and iterative use of the component theoretical and empirical approaches.  
**Other Comments:** This is a Letter of Intent from Terry Demo at Boston University for NSF 99-001.

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).

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NSF Home | News | Site Map | GPG | GPM | Contact Us | FastLane Help | Logout

Letters of Intent | MAIN

Organization: National Science Foundation

Create New LOI from Program Solicitation | Edit LOI

Search for LOIs by any of the following:

LOI ID:  LOI Due Date by range (mm/dd/yyyy) From:  To:  Search

LOI Title:  Project PI Last Name:

LOI Status:

LOI Work in Progress

Click on the LOI ID (e.g. L02010001) to view a HTML version of the LOI. Click on the Program Solicitation ID link (e.g. NSF 04-001) to view a Program Solicitation (opens a new browser window). Sort results by clicking on the column title.

69 Letters of Intent found, displaying 1 to 10 [Prev] 1, 2, 3, 4, 5, 6, 7 [Next]

LOI ID	LOI Title	Project PI	Program Solicitation ID	LOI Due Date	LOI Status	Actions
<a href="#">L00050096</a>	Scientific Research	alphaman, alan	<a href="#">NSF 01-003</a>	01/01/2003	Saved	<a href="#">Edit</a>   <a href="#">Submit</a>   <a href="#">Delete</a>   <a href="#">View PDF</a>
<a href="#">L00050099</a>	Scientific Research	alphaman, alan	<a href="#">NSF 01-003</a>	01/01/2003	Saved	<a href="#">Edit</a>   <a href="#">Submit</a>   <a href="#">Delete</a>   <a href="#">View PDF</a>
<a href="#">L00050094</a>	Test Data	schneider, craig	<a href="#">NSF 99-086</a>	01/01/2004	Submitted	<a href="#">View PDF</a>
<a href="#">L00050095</a>	Test Data	last, first	<a href="#">NSF 99-086</a>	01/01/2004	Submitted	<a href="#">View PDF</a>
<a href="#">L00050097</a>	Test Data	schneider, craig	<a href="#">NSF 99-086</a>	01/01/2004	Submitted	<a href="#">View PDF</a>
<a href="#">L00050098</a>	Test Data	last, first	<a href="#">NSF 99-086</a>	01/01/2004	Submitted	<a href="#">View PDF</a>

Figure 16. Edit LOI List Page

2. An *Are You Sure Page* (Figure 17) appears and asks 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).

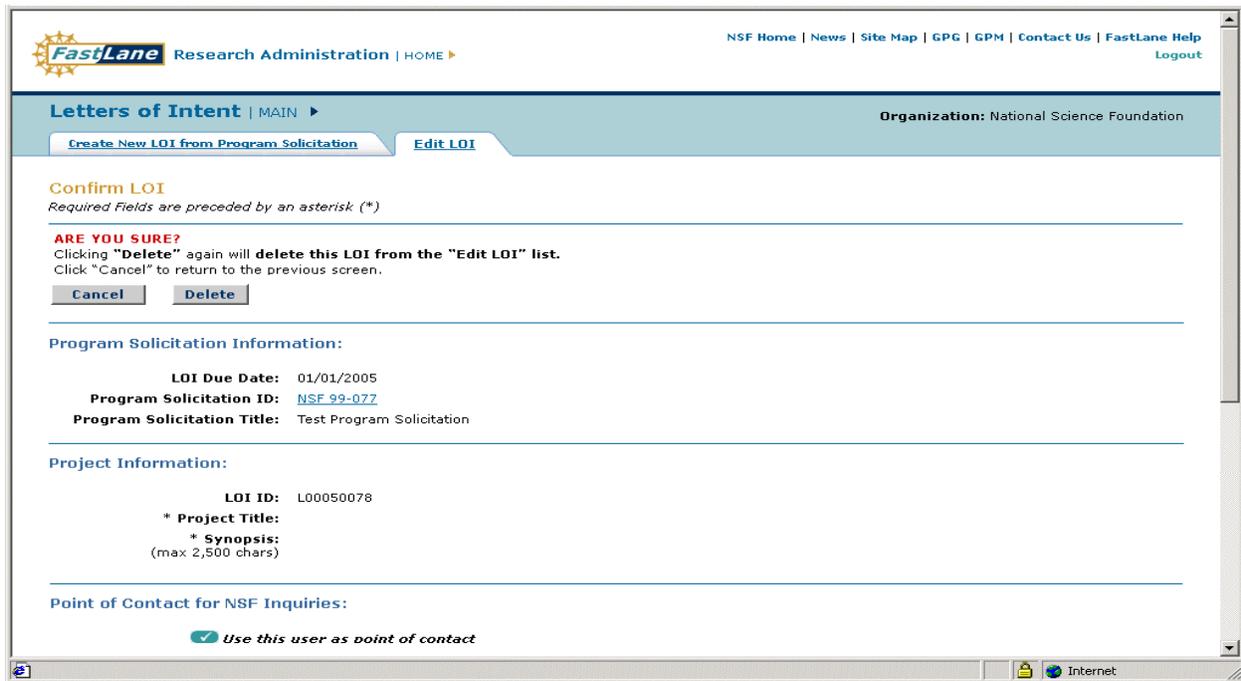


Figure 17. Delete Are Your Sure Page

## Edit a LOI

A SPO can edit either a LOI created within Research Administration or a LOI forwarded by a PI. Both types of LOIs require similar instructions. Complete the following instructions to edit an LOI:

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

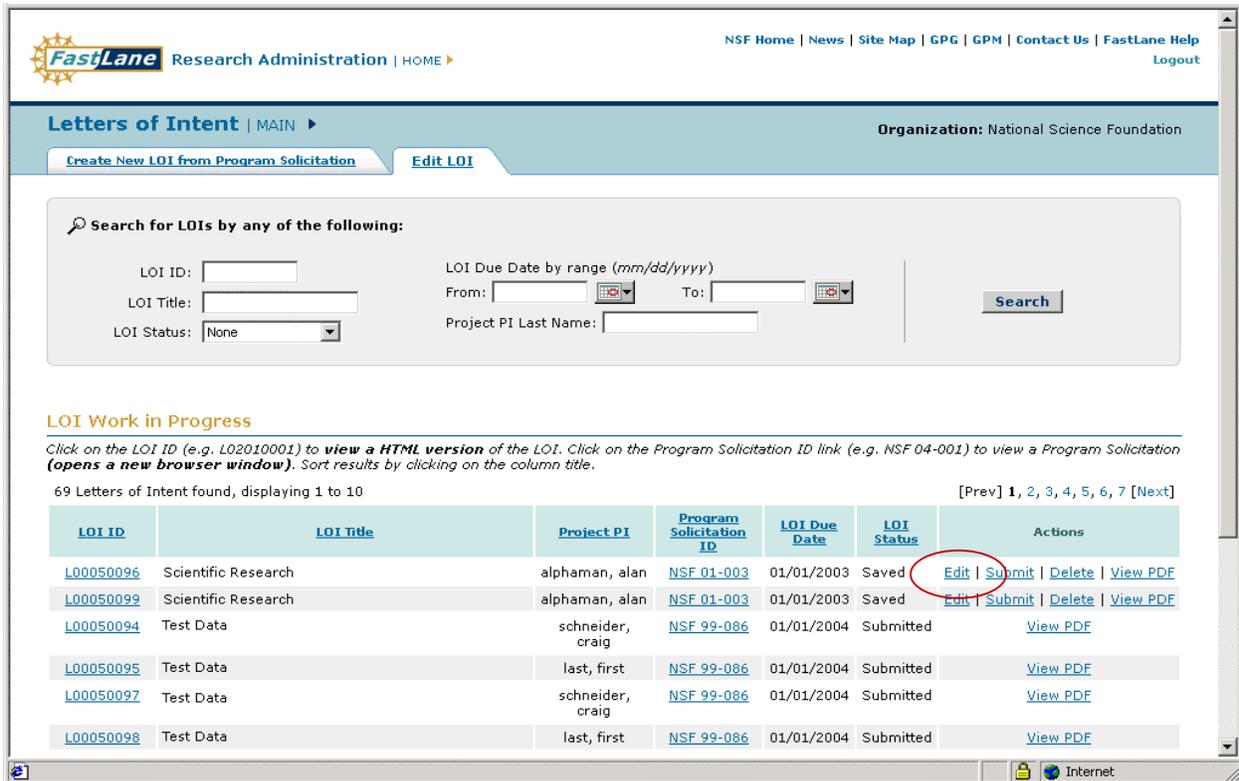


Figure 18. Edit LOI List Page

2. The *Edit LOI Page* (Figure 19) appears.

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NSF Home | News | Site Map | GPG | GPM | Send Comments | FastLane Help  
Logout

Letters of Intent | MAIN

Organization: National Science Foundation

Create New LOI from Program Solicitation Edit LOI

**Edit LOI**  
Required Fields are preceded by an asterik (\*)

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:**

\* **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 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) appears.

Or

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

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)

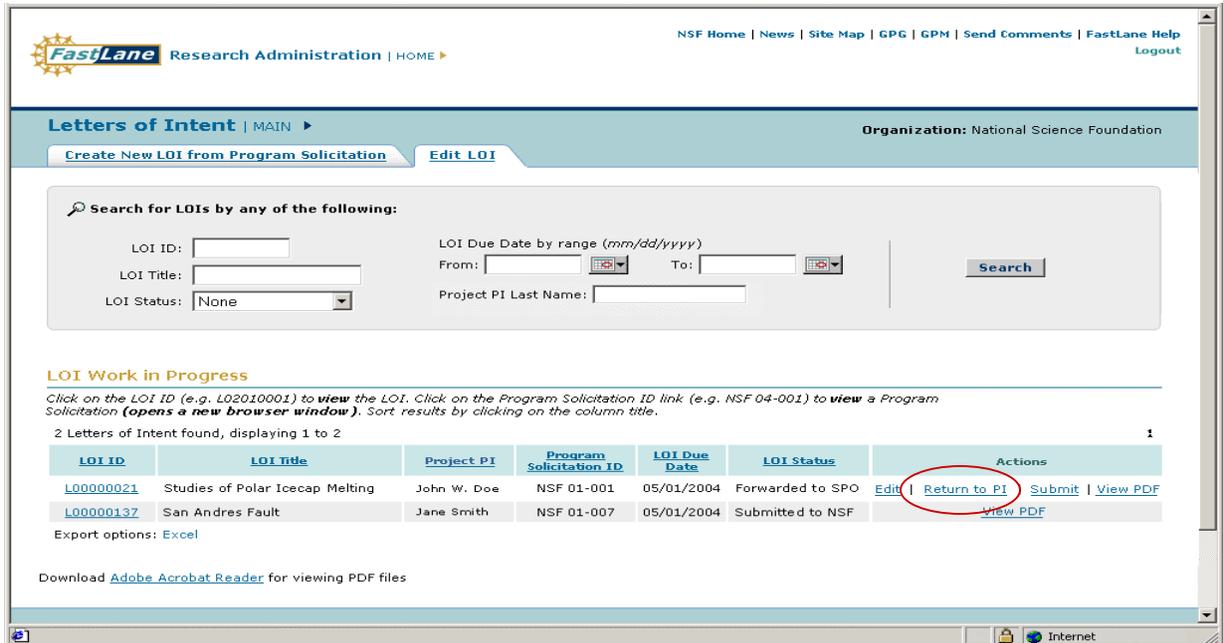


Figure 20. Edit LOI List Page

Or

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

**Point of Contact for NSF Inquiries:**

Use this user as point of contact

**First Name:** Jay  
**Middle Initial:** A  
**Last Name:** Sebastian  
**Telephone Number:** (703) 555-1212  
**Email Address:** sebastian\_jay@bah.com

Use this (alternate) name as point of contact

**\* First Name:**   
**Middle Initial:**   
**\* Last Name:**   
**\* Telephone Number:**   
**\* Email Address:**

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**Project PI:**

**\* First Name:**   
**Middle Initial:**   
**\* Last Name:**

**\* Organization Name:**

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**Cross Directorate LOI/Multi-Disciplinary LOI:**

**\* Primary Division:**   
**\* Secondary Division:**   
**\* Tertiary Division:**

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Figure 21. Edit LOI Page

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

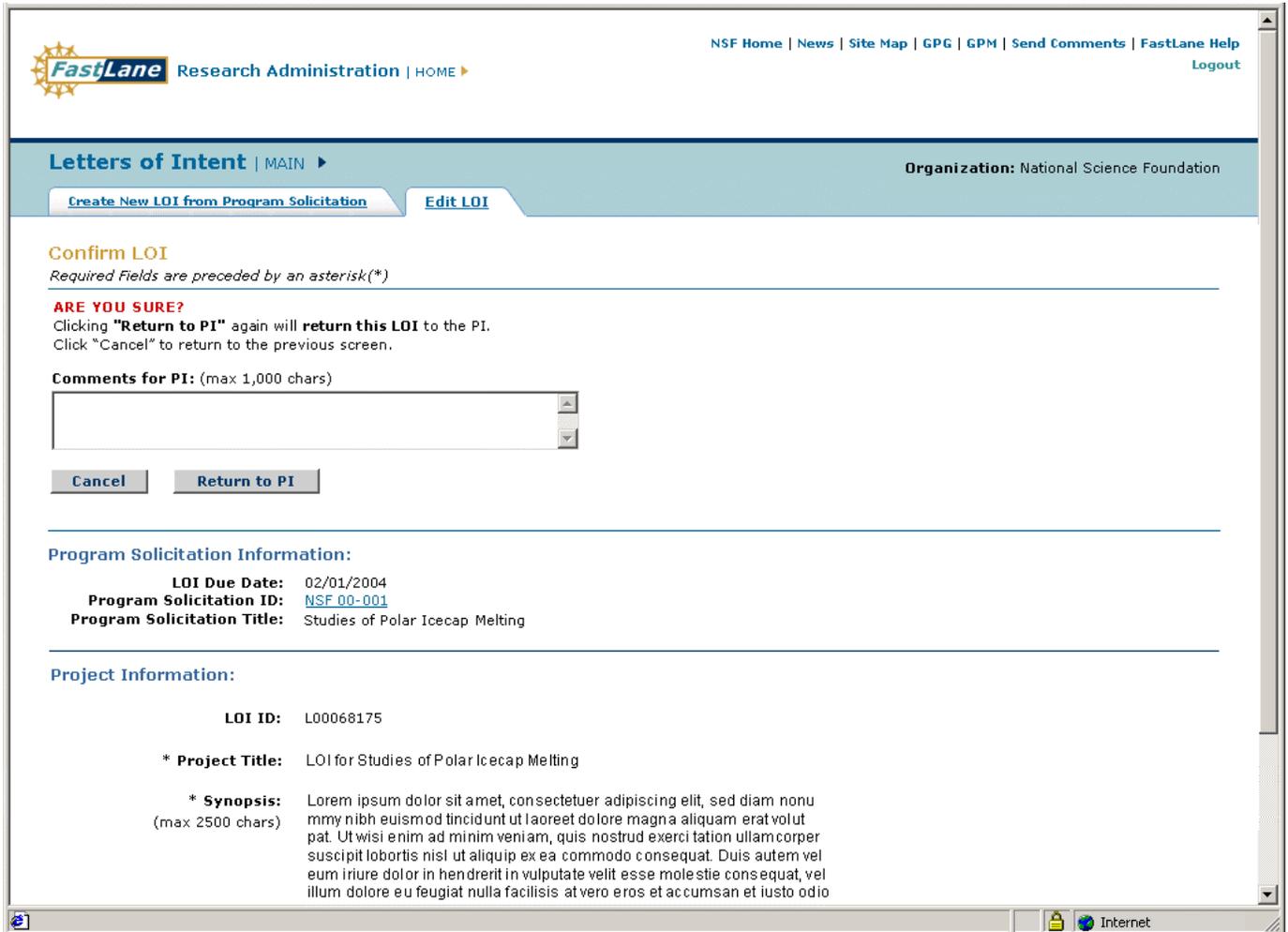


Figure 22. Return to PI Are You Sure Page

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) appears. 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*.

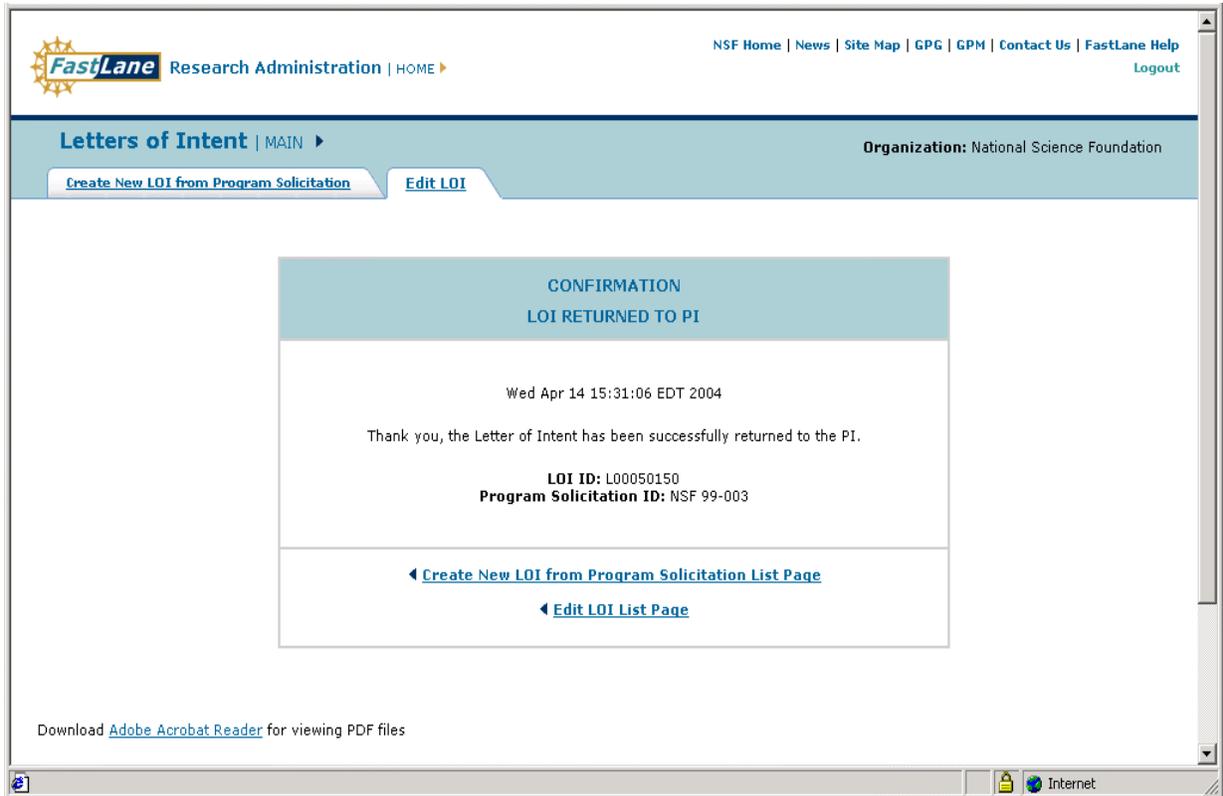


Figure 23. Returned Confirmation Page

## Submit a LOI

SPOs can submit a LOI created within Research Administration or a LOI forwarded by the PI. 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).

Point of Contact for NSF Inquiries:

Use this user as point of contact       Use this (alternate) name as point of contact

First Name: Jay      \* First Name:

Middle Initial: A      Middle Initial:

Last Name: Sebastian      \* Last Name:

Telephone Number: (703) 555-1212      \* Telephone Number:

Email Address: sebastian\_jay@bah.com      \* Email Address:

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Project PI:

\* First Name:       \* Organization Name:

Middle Initial:

\* Last Name:

---

Cross Directorate LOI/Multi-Disciplinary LOI:

\* Primary Division:

\* Secondary Division:

\* Tertiary Division:

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Figure 24. Edit LOI Page

Or

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

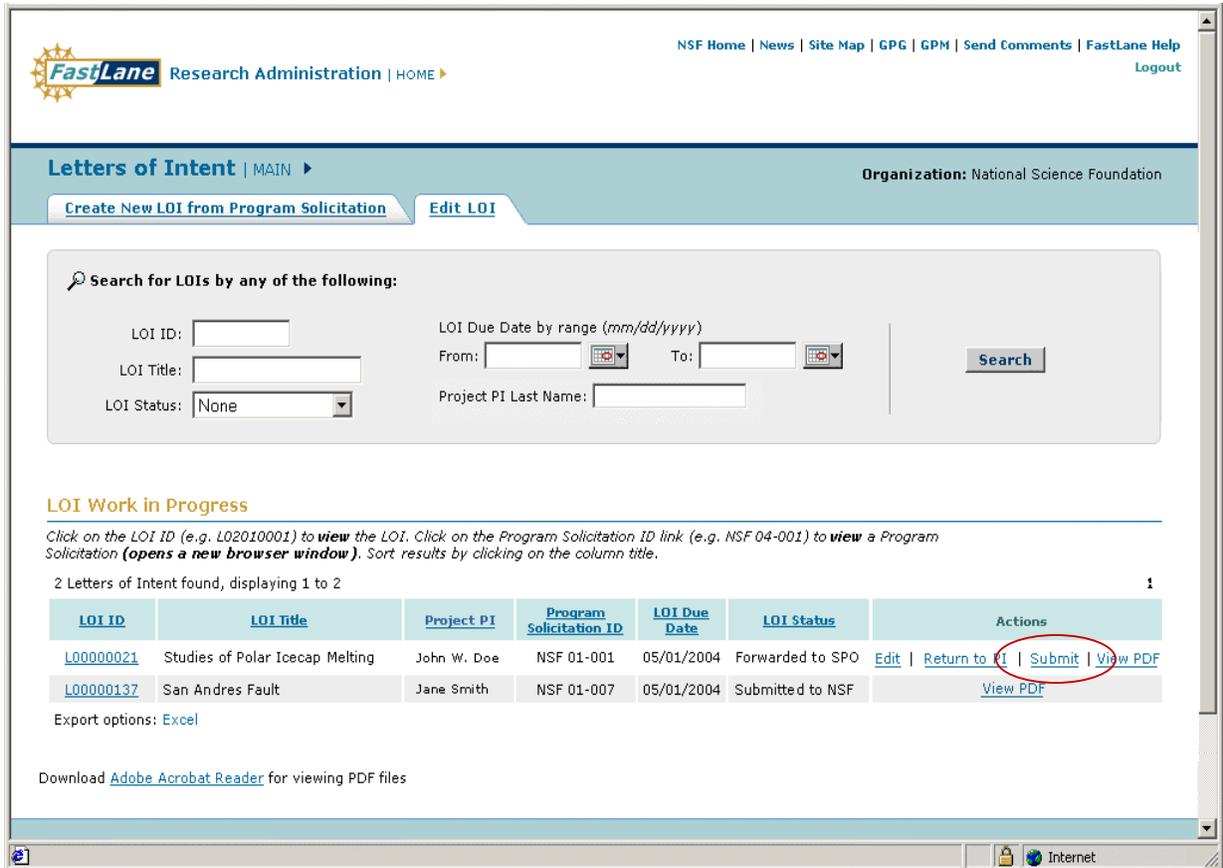


Figure 25. Edit LOI List Page

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

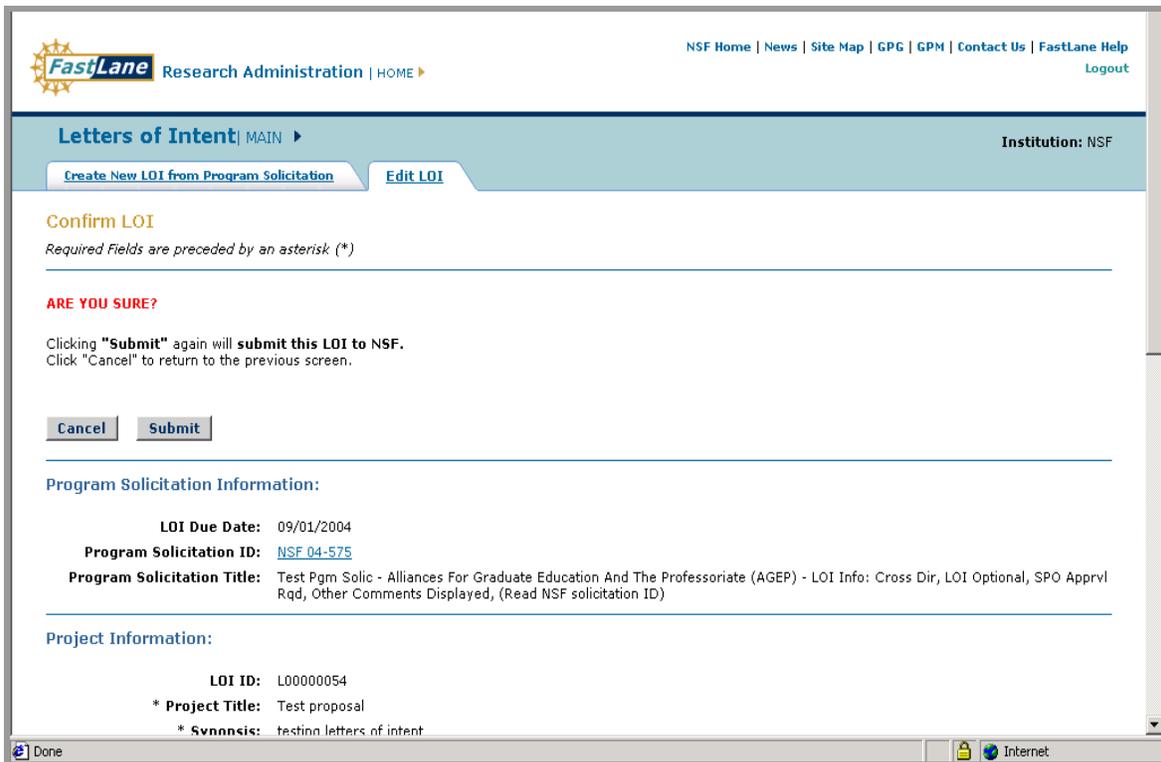


Figure 26. Submit Are You Sure Page

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 click on **Edit LOI List Page** to return to the *Edit LOI List Page*.

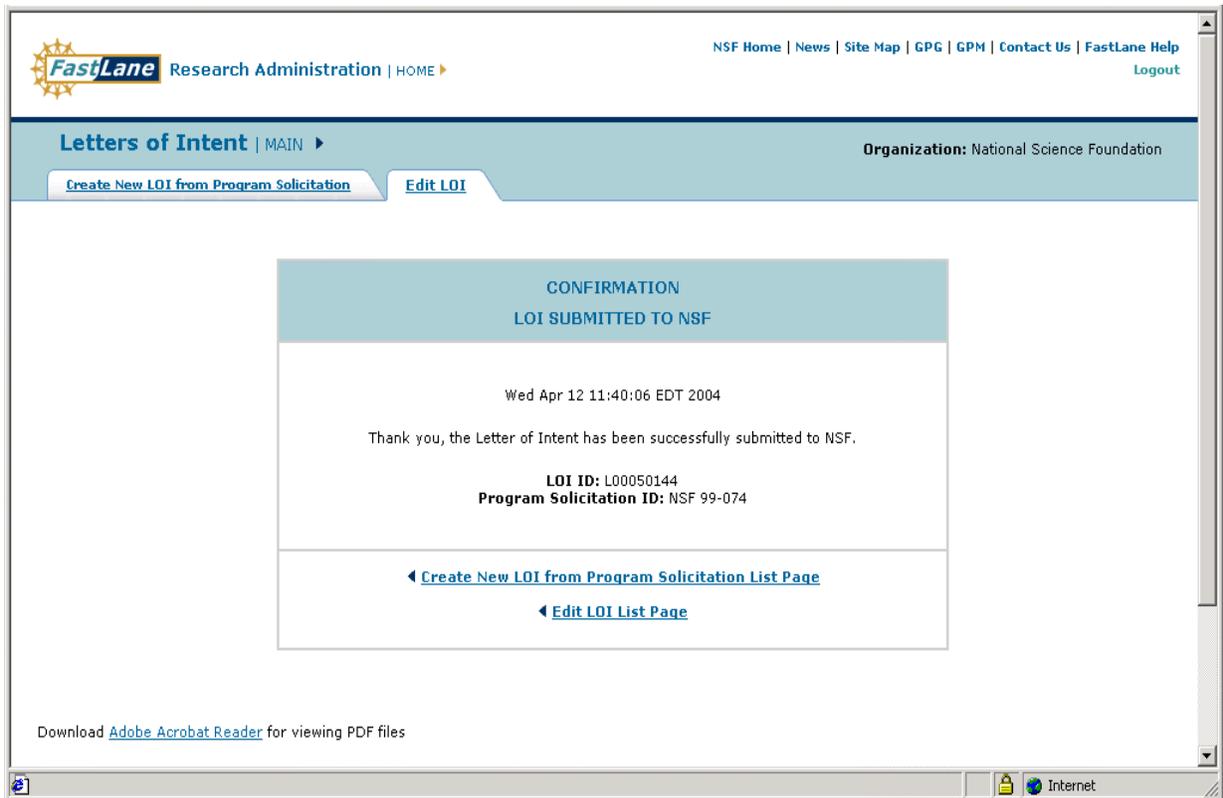


Figure 27. Submit Confirmation Page