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Introduction

As a SBIR grant recipient in order to process payment requests and view grant financial information with NSF, you must be assigned a Financial Functions User (FFU) role through FastLane. FFU roles are assigned by your organization's Financial Administrator. Once you are an FFU, you can use the Award Cash Management Service (ACM$) to:

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

How to Become a Financial Function User (FFU)

Becoming a FFU; this involves two steps:

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

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

FFU Roles:

1. The **ACM$ Awardee Preparer** is the financial/administrative person that initially prepares the payment transaction request in ACM$. The Awardee Preparer forwards the payment transaction request to a Certifier for certification and submission to NSF. The Preparer also has the capability to complete award and transaction searches and view the payment transaction history.

2. The **ACM$ Awardee Certifier** is the approving official for the payment transaction request. This person normally holds a management/supervisory role and has the organizational authority to approve payments and/or expenses. For smaller organizations with limited staff sizes the Certifier can also be the ACMS Preparer. The

Certifier also has the capability to complete award and transaction searches and view the payment transaction history.

3. The **ACM$ Awardee Financial Representative** is the organizational staff member that has view only access to ACM$, this person cannot prepare or certify cash request transactions. The Financial Representative has the capability to complete award and transaction searches and view the payment transaction history.

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

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

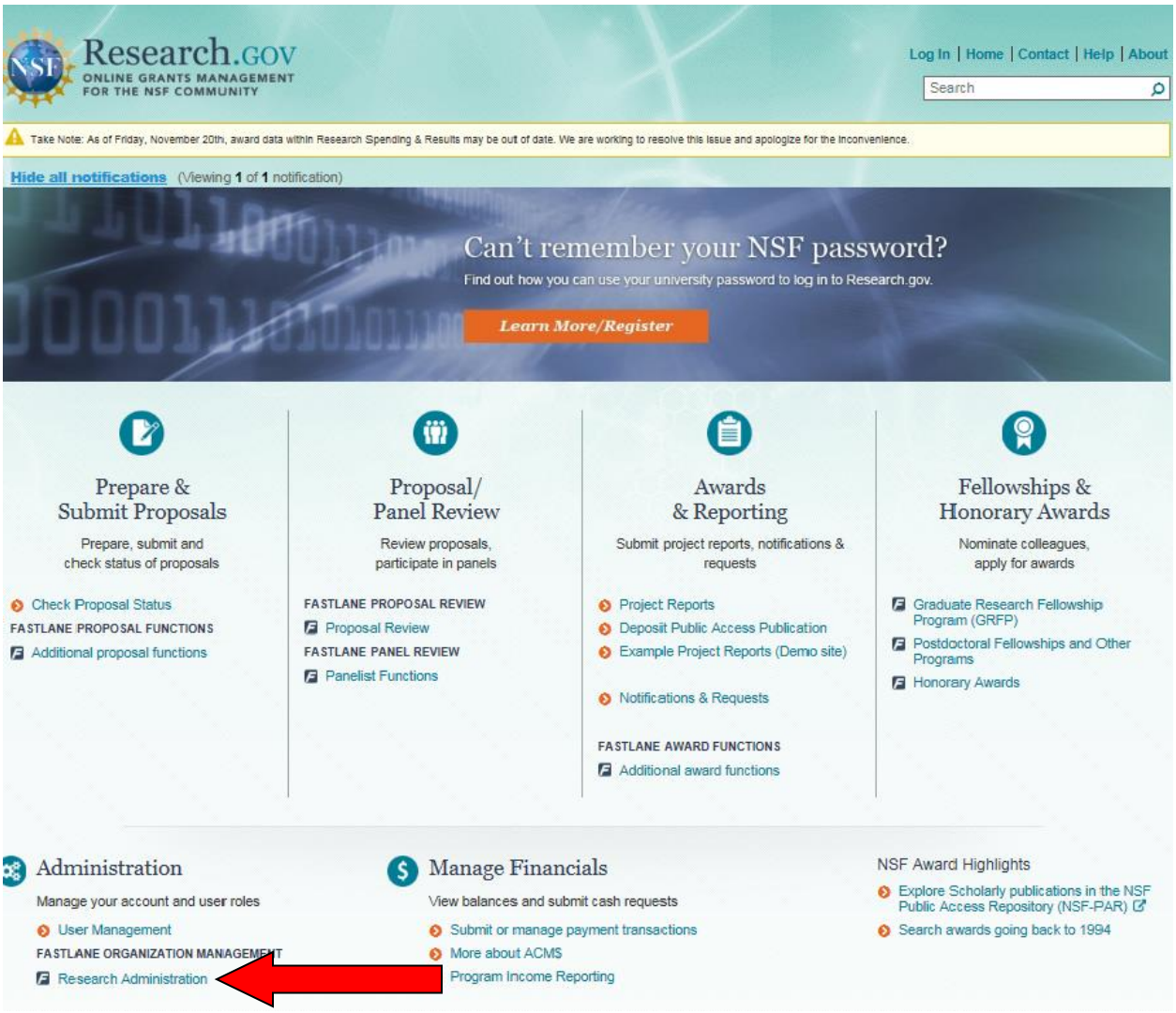
Assigning the Financial Administrator Role

The Authorized Organizational Representative (AOR) designates a Financial Administrator by giving an individual the Financial Administrator permission in the Accounts Management

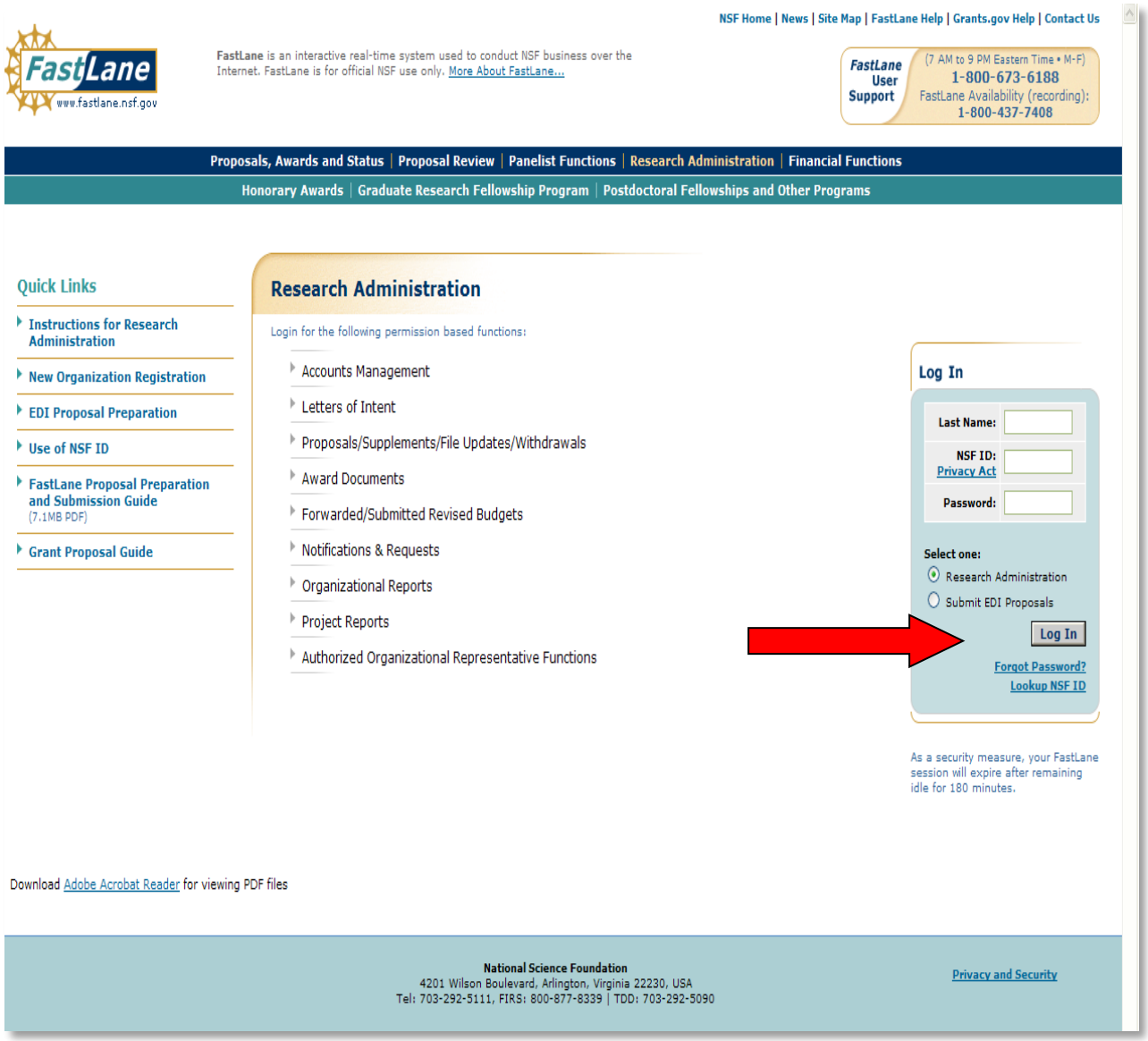
application of Research Administration. The AOR can do this in two ways: **1. Add a new User**, and **2. Modify a User Profile.**

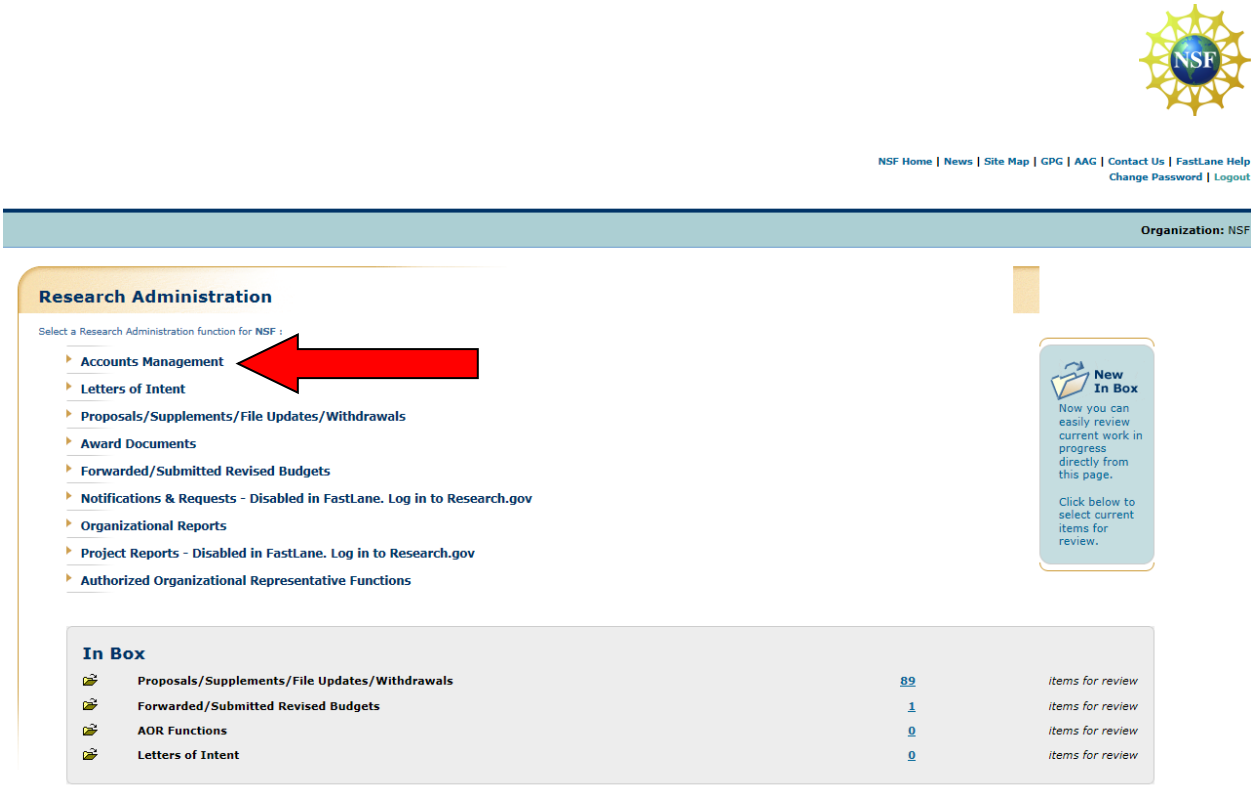
Add New User

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

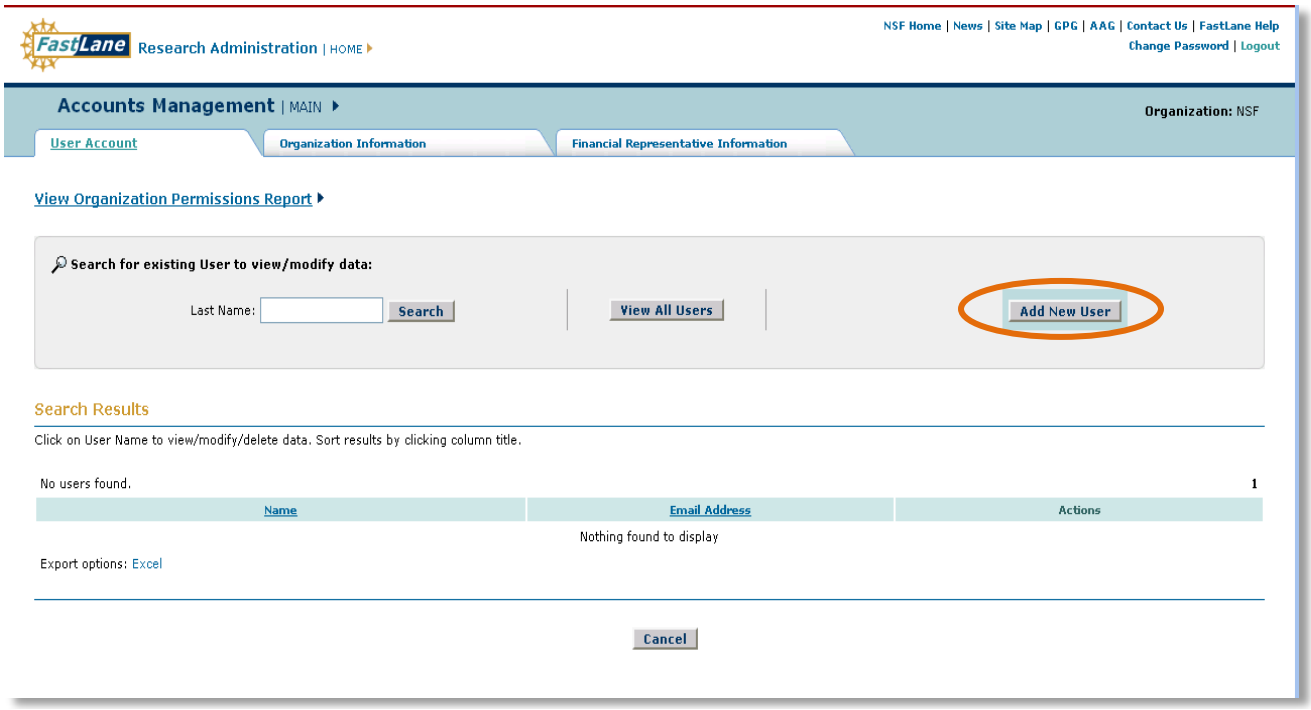


1. On the **Research Administration** screen, log in, then click on **Accounts Management**. The **Accounts Management** screen will display the **User Account** tab by default.





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



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

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

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

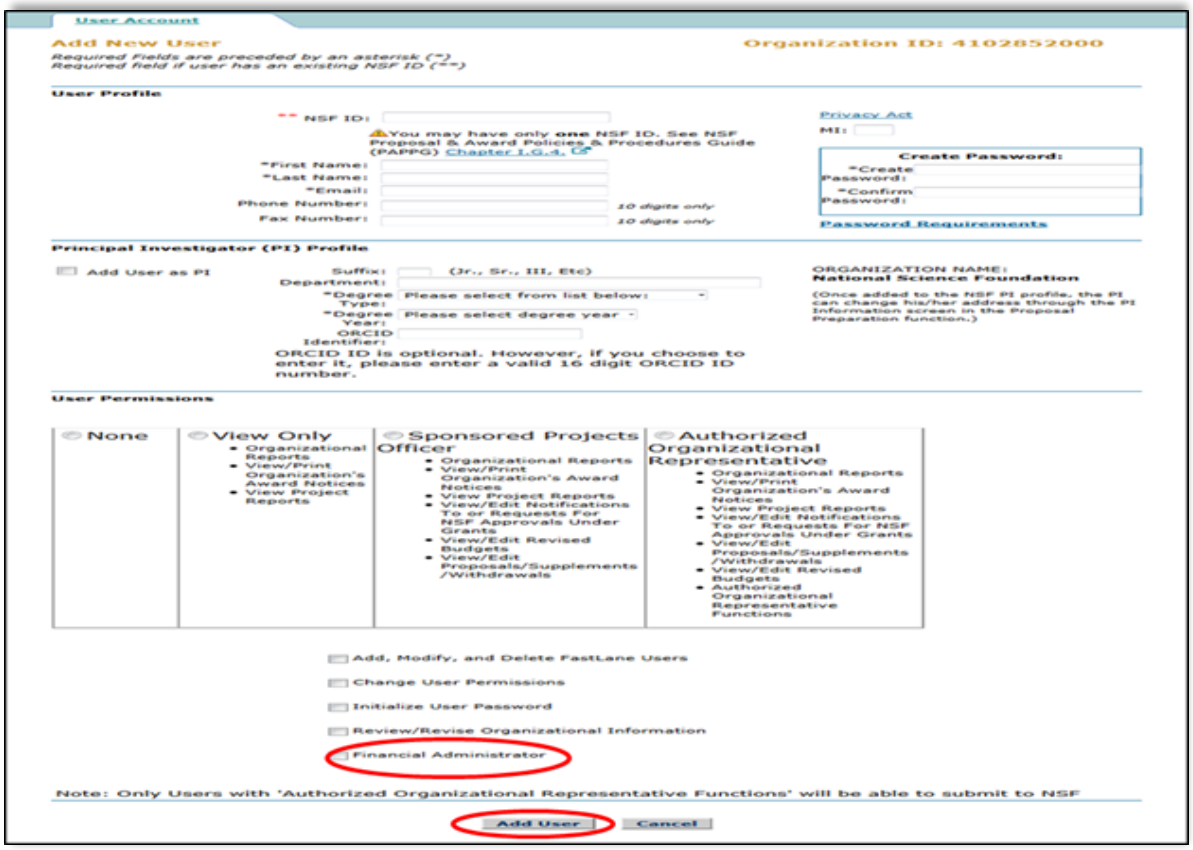
Note: If the new user is a **Principal Investigator (PI)**, complete the *Principal Investigator (PI) Profile* section and click the **Add user as PI** check mark box.

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

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

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

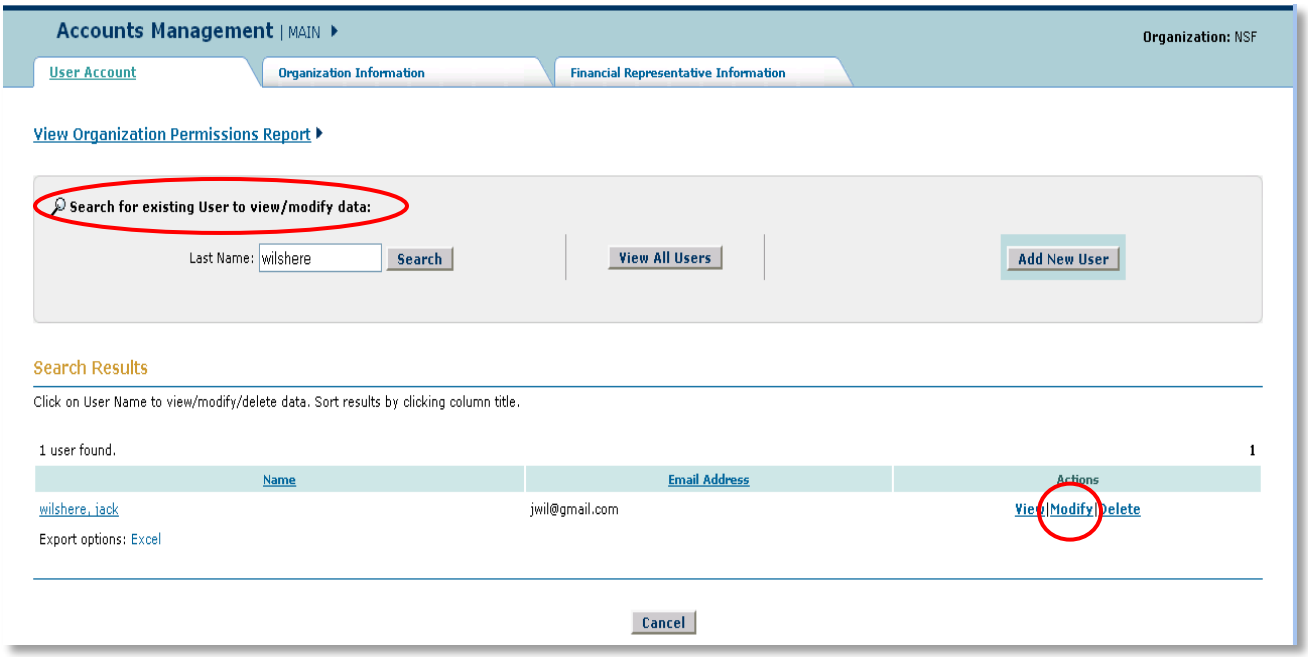
User Profile screen



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

Modify a User Profile

1. Go to *Research.gov,* click on the **Research Administration** link at the bottom of the screen.
2. On the FastLane home page and click on **Research Administration**. The Research Administration home page displays with a listing of functions. Login using your NSF ID and password.
3. On the **Research Administration** screen, click **Accounts Management**. The **Accounts Management** screen will display with the **User Account** tab as default.
4. Search for the User whose profile you need to modify.
5. On the **Accounts Management** screen, click **Modify** on the row for the user whose profile you want to modify.



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

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

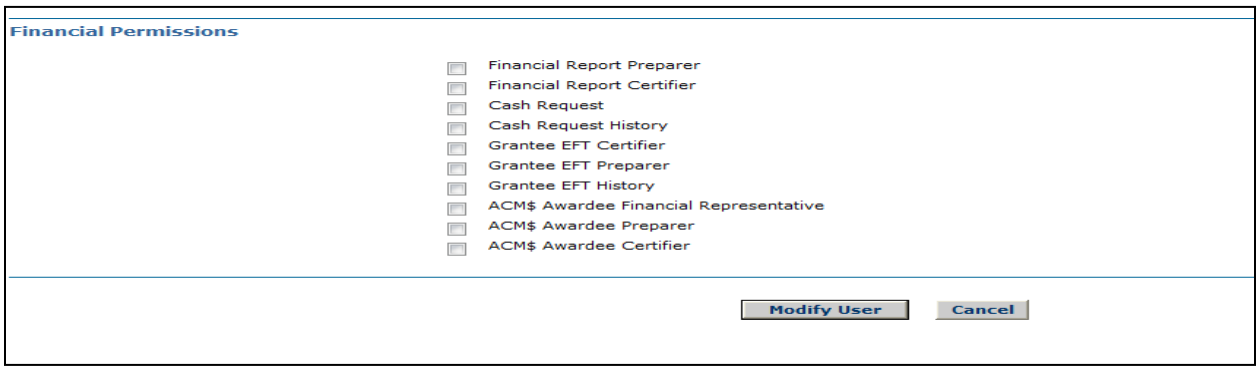
Assigning the Financial Function User Roles

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

To assign Financial Function permissions to an existing user:

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

        - ACM$ Awardee Preparer
        - ACM$ Awardee Certifier

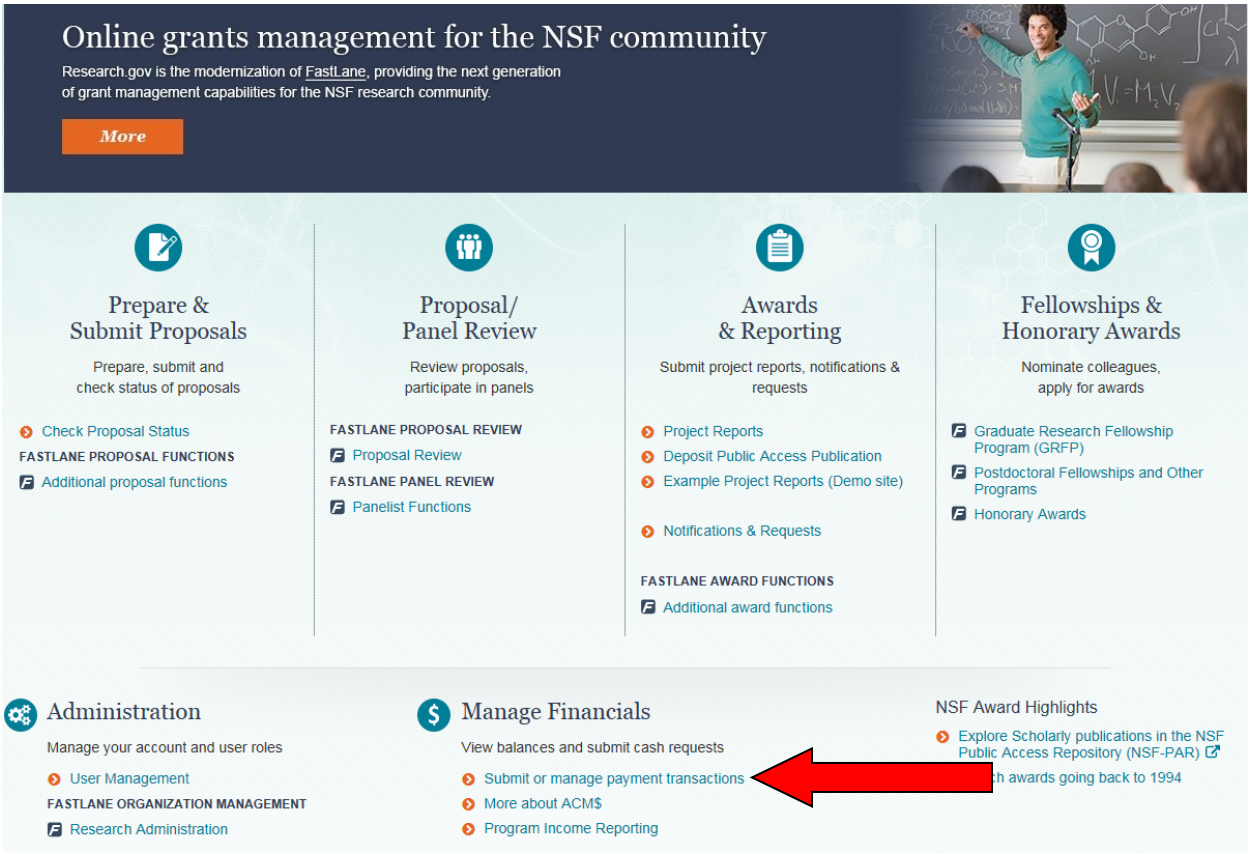


A single user can act as the preparer and certifier simultaneously. *As mentioned, all permissions must be assigned by the Financial Administrator*

Logging In to Research.gov

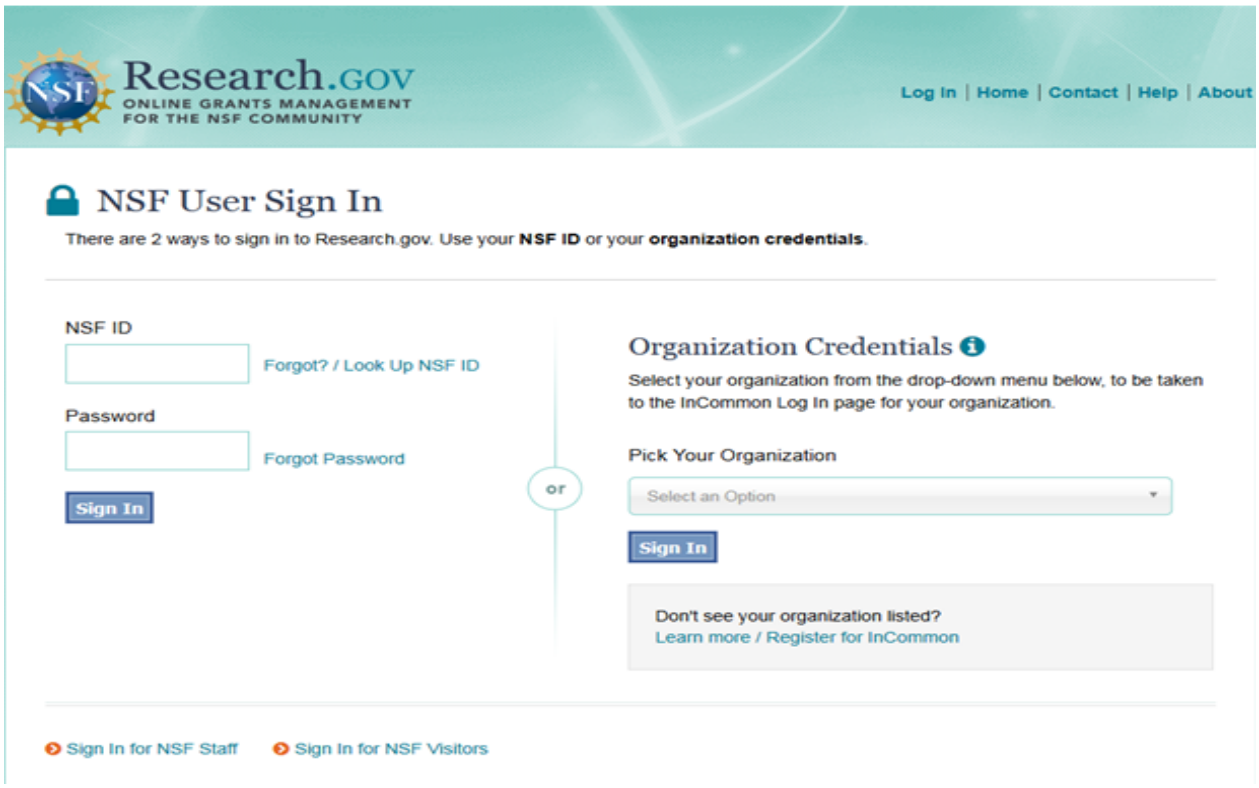
If you have been added as a new user and given financial permissions. You can now perform those financial functions for which you have permission.

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

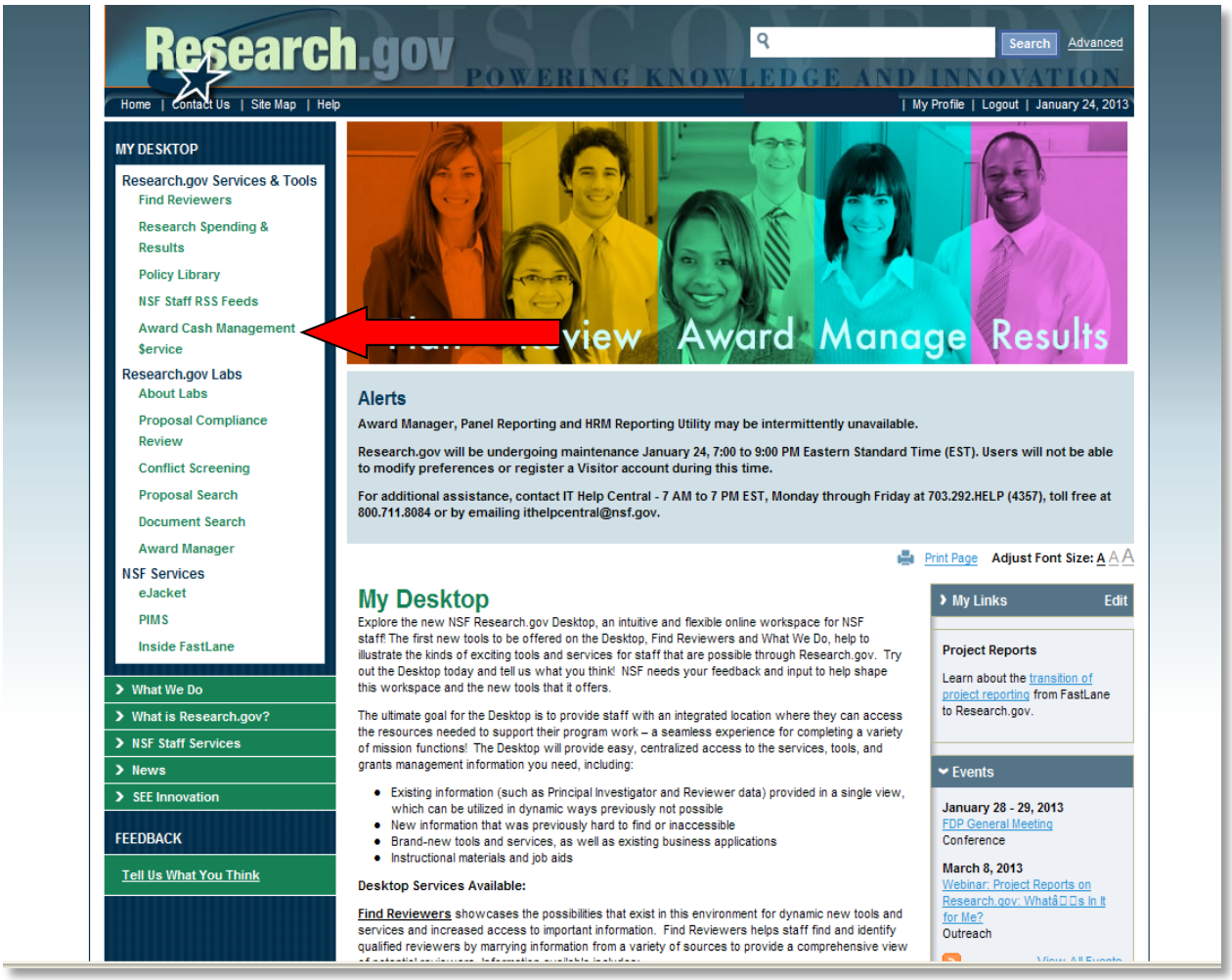


2. Enter your NSF ID and password.

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



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



How to Change the Banking (EFT) Information

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

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

Award Cash Management $ervice

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

Use the links below to access ACM$ user information.

ACM$ Getting Started Guide *ACM$ Permissions Guide*