

NSF Proposal Review Checklist – Quick Guide

Purpose: This checklist is intended to assist DCP research administrators in preparing and reviewing NSF proposals. It provides a high-level compliance checklist and supplemental guidance; however, it does not replace the NSF Proposal & Award Policies & Procedures Guide (PAPPG) or program-specific solicitation requirements.

NSF Proposal Guide: [Proposal & Award Policies & Procedures Guide \(PAPPG\) | NSF - National Science Foundation](#)

- ☐ Review the NSF solicitation and PAPPG requirements.
- ☐ Confirm the solicitation number and any program-specific deviations from the PAPPG.
- ☐ Confirm all personnel have the appropriate Research.gov roles and access required for proposal preparation and submission, including to complete required key personnel documents
 - **Reference:** Research.gov Account Management Guide (for creating and managing NSF accounts): [Account Management Guide | NSF - National Science Foundation](#)
- ☐ Confirm all Key and Senior Personnel have completed the required Financial Conflict of Interest (FCOI) disclosure via [eDisclose](#).
 - Where to verify: UFIRST > SFI Tab
- ☐ Confirm all required personnel have completed Research Security Training.
 - Where to verify: UFIRST > Summary Page
 - How to complete: [Research Security - UF Research](#)
- ☐ Maintain ready access to the [DCP Review & Approval Workflow](#) to ensure that required approvals are obtained when necessary.

Cover Sheet:

- ☐ Confirm Human Subjects and/or Animal Subjects are correctly identified.
 - Use “Pending” if IRB/IACUC approval has not yet been obtained.
 - If an approval date is entered, obtain a copy of the approval for verification.
- ☐ For collaborative proposals, confirm the title begins with “**Collaborative Research:**” when required.

Collaborative Proposals:

- ☐ Confirm the Collaboration method:
 - Single proposal with subawards issued by the lead organization; or
 - Separately submitted collaborative proposals where each institution receives its own NSF award.
- ☐ For Separately submitted collaborative proposals:

- Ensure each non-lead organization provides the required proposal PIN information to the lead institution.
- Confirm all collaborative proposals are properly linked in Research.gov before final submission.

Project Summary

- ☐ Confirm the Project Summary is no more than one page.
- ☐ Confirm the following three required sections are included:
 - Overview
 - Intellectual Merit
 - Broader Impacts

Table of Contents

- ☐ Review the generated Table of Contents for completeness (e.g., page limits)
- ☐ Confirm all required documents are uploaded (e.g., Data Management and Sharing Plan, Mentoring Plan when applicable).

Project Description

- ☐ Confirm page limits based on the solicitation (typically 15 pages unless otherwise specified).
- ☐ Confirm a discussion of Broader Impacts is included as a separate section within the narrative.
- ☐ Confirm no URLs are included in the Project Description.
- ☐ Confirm **Results from Prior NSF Support** is included when required:
 - Applies to PIs and Co-PIs who have received NSF support within the previous five years.
 - Must include separate discussions of Intellectual Merit and Broader Impacts for prior support.

Budget & Budget Justification

- ☐ Confirm senior personnel salary follows NSF's two-month salary policy.

Guidance: If the proposal exceeds the two-month salary limit, include the following justification in the budget justification.

"2-month rule: If this proposal is funded at the requested level, the PI's total salary charged across all active NSF-funded projects will exceed the two-month limit typically allowed for senior personnel. However, the level of effort proposed for this project, combined with the PI's other commitments, reflects the minimum effort necessary to successfully carry out the proposed scope of work. Reducing the PI's effort solely to comply with the two-month rule would compromise the timely and effective completion of the project. Therefore, approval for the excess is requested in accordance with NSF guidelines."

- ☐ Confirm Senior Personnel are removed from Section A of the budget if no salary is requested and no person-months are being committed.
- ☐ Confirm no voluntary committed cost sharing is included in the budget or budget justification.

- ☐ Review for potential CAS concerns (e.g., administrative/clerical salaries, office supplies, routine telephone costs).
- ☐ Confirm the correct UF F&A (IDC) rate and calculations are applied:
 - Exclude tuition,
 - Equipment,
 - Participant Support Costs, and
 - Subaward amounts exceeding \$50,000 from the MTDC base.
- ☐ Confirm graduate tuition is budgeted in the appropriate budget category (Category G: Other Direct Costs) and is included in the budget justification.
- ☐ Confirm all domestic and foreign travel includes adequate justification.
Note: Dependent care costs may be allowable if NSF criteria are met.
- ☐ Confirm computing devices (e.g., desktops, laptops, tablets) are essential and allocable to the project and meet UF CAS requirements.
- ☐ Confirm Budget Justification does not exceed the page limit
 - Prime Proposal: 3 pages
 - Each subaward: Additional 3 pages

Subawards

- ☐ Confirm each subrecipient includes:
 - *Separate subaward budget*
 - *Subaward budget justification*
 - *Required Senior/Key Personnel documents (as applicable)*

Note: Additional subrecipient documentation may be required based on sponsor and institutional requirements.

Participant Support costs

Definition: Participant Support Costs include transportation, per diem, stipends, and other related expenses for participants or trainees (not employees) in connection with NSF-sponsored conferences, meetings, symposia, training activities, or workshops.

Special Consideration: For some educational projects involving local school districts, participants may be employees. These costs may still be classified as Participant Support Costs if payments are made through a stipend or training allowance and the school district maintains an accounting mechanism to differentiate the payments from regular salary.

- ☐ Confirm costs are appropriately classified.
- ☐ Confirm the number of participants is included in the budget.
- ☐ Confirm Participant Support Costs are justified in the budget justification.
- ☐ Review the solicitation for any additional Participant Support Cost requirements.

Reference: [Participant Support Cost Resources - Manage Your Award | NSF - National Science](#)

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References Cited

- ☐ Confirm references include the title and all authors.
Note: “et al.” is not allowed in bibliographic citations.
- ☐ If no References Cited are included, verify the solicitation and/or NSF PAPPG requirements for what documentation, if any, should be provided.

Biographical Sketch (Biosketch)

- ☐ Confirm all PI, Co-PI, and other Senior/Key Personnel complete the Biosketch in Research.gov.
- ☐ Confirm the Biosketch does not exceed two pages per individual.
- ☐ Confirm no more than 10 Products/Publications are included.

Synergistic Activities - Separate document (used to be part of biosketch)

- ☐ Confirm a separate Synergistic Activities document is included for each applicable Senior/Key Personnel.
- ☐ Confirm no more than five Synergistic Activities are listed unless otherwise allowed by the solicitation.
- ☐ If multiple personnel are included, ensure each section clearly identifies the individual.

Current and Pending Support

- ☐ Confirm all PI, Co-PI, and other Senior/Key Personnel complete Current & Pending Support in Research.gov.
- ☐ Confirm the current proposal is listed as Pending Support. (fatal error)
- ☐ Confirm all current and pending projects requiring a commitment of time are included, regardless of funding source or whether salary support is requested.
- ☐ Confirm the following information is included for each entry:
 - Total award amount for the entire project period (including F&A)
 - Person-months committed for each project periodYear should start with the end of the first period and so on.

Definitions:

- **Current Support:** Projects that have been awarded.
- **Pending Support:** The current proposal and all other proposals expected to be submitted within the next six months.
- **Support is defined** as any commitment of the individual’s time (in person-months) for any sponsored project (e.g., Federal, State, local or foreign government agencies, public or private foundations, industrial or other commercial organizations), even if they receive no salary support from the project(s).

Facilities, Equipment and Other Resources:

- ☐ Confirm Facilities, Equipment, and Other Resources are described in narrative format.
- ☐ Confirm only resources directly applicable to the project are included.
- ☐ Confirm no quantifiable financial information is included.
- ☐ If no resources are applicable, upload a document stating “Not Applicable.”

Supplementary Docs:

- ☐ Review the NSF PAPPG and solicitation for any required supplementary documents.
[Proposal & Award Policies & Procedures Guide \(PAPPG\) \(24-1\) | NSF - National Science Foundation](#)

Postdoctoral Researcher & Graduate Student Mentoring Plan:

- ☐ If postdoctoral researchers or graduate students are included, confirm a Researcher Mentoring Plan is uploaded. [NSF 101: The Mentoring plan | NSF - National Science Foundation](#)

Data Management & Sharing Plan:

- ☐ Confirm a Data Management & Sharing Plan is included in every proposal.
- ☐ Confirm the plan does not exceed two pages.
- ☐ For separately submitted collaborative proposals, confirm the lead institution submits one comprehensive Data Management & Sharing Plan covering all collaborators.

[Preparing Your Data Management and Sharing Plan - Funding at NSF | NSF - National Science Foundation](#)

Single Copy Documents:

- ☐ Complete all required Single Copy Documents, as applicable:
 - Information on personnel
 - Authorization to deviate from NSF proposal requirements
 - Suggested reviewers

Final Proposal Review

- ☐ Confirm that all required approvals were obtained in accordance with the [DCP Review and Approval Workflow](#) prior to proposal submission in UFIRST.
- ☐ Review all Research.gov errors and warnings prior to submission.
Reminder: Research.gov error checks do not identify:
 - Solicitation-specific requirements
 - Budget compliance issues
- ☐ Review special proposal types (e.g., RAPID, EAGER, FASED) for additional NSF requirements.
[Proposal & Award Policies & Procedures Guide \(PAPPG\) \(24-1\) | NSF - National Science Foundation](#)

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- ☐ **Confirm the solicitation has been reviewed. Solicitation-specific requirements override this checklist.**

NSF Links & Guides:

- ☐ Website:
 - [Microsoft Word - Research.gov - Granting OAU Access](#)
 - [Proposal & Award Policies & Procedures Guide \(PAPPG\) \(24-1\) | NSF - National Science Foundation](#)
- ☐ Detailed instructions for Research.gov:
 - [Research.gov - Grants Management for U.S. NSF Community](#)
 - [NSF Account Management: Account Registration](#)
 - [Instruction Guide - NSF User Role Request](#)
 - [UF Research - Research.gov-Instruction-Guide.pdf](#)
 - [UF Research - Research.gov - Granting OAU Access](#)
 - [About Proposal Preparation and Submission - Research.gov](#)
 - [Instructions: Research.gov Proposal Submission System](#)