USDA National Institute of Food and Agriculture
U.S. DEPARTMENT OF AGRICULTURE

NIFA Reporting System User Guide

NIFA Planning, Accountability, and Reporting Staff

Last Updated: June 2026

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ABOUT THE NIFA REPORTING SYSTEM

The NIFA Reporting System (NRS) provides data management and reporting for capacity funded research projects and Extension programs. Primary NRS users include Land-grant Universities, other partner institutions, cooperating state institutions, and NIFA staff.

NRS is managed by the Planning, Accountability, and Reporting Staff (PARS).

CAPACITY FUNDING TYPES INCLUDED IN NRS

The following capacity grant funding is included in NRS:

- Animal Health and Disease Research (AHDR)
- Extension Capacity Fund (1890)
- Extension Capacity Fund (Smith-Lever 3(b) and 3(c))
- McIntire-Stennis
- Renewable Resources Extension Act (RREA)
- Research Capacity Fund (Evans-Allen)
- Research Capacity Fund (Hatch Multistate)
- Research Capacity Fund (Hatch)

Additionally, Smith-Lever Special Needs funds may be used to support Smith-Lever 3(b) and 3(c) Extension programs in NRS.

AREERA FUNDING

The Agricultural Research, Extension, and Education Reform Act of 1998 (AREERA) amended the Smith-Lever Act, the Hatch Act, and the National Agricultural Research, Extension, and Teaching Policy Act of 1977 (the funding authorities for Extension and Research activities) to require approved Plans of Work and Annual Reports of Accomplishment.

AREERA funding includes Hatch, Hatch-Multistate, Evans-Allen, Smith-Lever 3(b)(c), and 1890 Extension funds. Organizations that do not receive AREERA funding are not required to submit a Plan of Work or Annual Report of Accomplishments.

Table 1. AREERA Research and Extension Funding Types in NRS

AREERA Funding Type	1862 Land grant University	1890 Land grant University
Research	Hatch or Hatch Multistate	Evans-Allen (Section 1445)
Extension	Smith-Lever 3(b) and 3(c)	1890 Extension (Section 1444)

REPORT TYPES AND DEADLINES

NRS contains both non-financial and financial reporting for capacity funding. Most reporting follows the federal fiscal year cycle, which runs from October 1 through September 30 of the following year. Annual reporting requirements and typical deadlines are listed below, however official deadlines for each reporting year and any updates or changes for specific reports are always listed on the NIFA Reporting System website.

- **Plan of Work** (Due June 1 before Fiscal Year start) – AREERA only
  What the institution plans to accomplish with capacity funds for the next five years; includes Critical Issues
- **Critical Issues** (included in Plan of Work above) – AREERA only
  Short-, intermediate-, and long-term state challenges aligned with NIFA's science emphasis areas
- Add **Research Projects and Extension Programs**
  - Initiation & Approval throughout the year
- Financial Reporting
  - **Financial Report for Projects and Programs** (Due February 1 after Fiscal Year end)
    Reporting on expenditures and FTEs on projects and programs active during the reporting year.
  - **OGFM Supplemental Form** (Due summer after Fiscal Year end) – specific 1862 LGUs only
    Reporting on specified percentage of Hatch Act and Smith-Lever Act grant funds on multistate Extension and integrated research and Extension activities
- **Results** (Due March 1 after Fiscal Year end)
  Annual and final reporting on accomplishments and impacts for projects and programs; previously called progress reports
- **Annual Report of Accomplishments** (Due May 1 after Fiscal Year end) – AREERA only
  What the institutions in a state have accomplished in the past year including executive summary with update on Critical Issues and highlighted Results from projects and programs

NIFA REVIEW AND REVIEWER INFORMATION

NIFA staff review all submissions for completeness, compliance, and approval. Reports and records that are required to be submitted to NIFA Review will include a NIFA Reviewer Information field on the details page, identifying the NIFA reviewer(s) currently assigned. Reviewer assignments are managed internally by NIFA, are not editable, and are displayed for reference and transparency purposes only.

NIFA Reviewer Information fields appear on the details page for:

- Projects and programs
- Results
- Plan of Work
- Annual Report

Review timelines may vary depending on report type and the need for revisions or additional information.

NRS USER ROLES & PERMISSIONS

To access NRS, all users must first create a Login.gov account and complete identity verification as outlined in the NIFA Reporting System Registration Guide. After verification, an Organizational Administrator (Org

Admin) at your institution will assign your NRS role. If you are unsure who your Org Admin is, please email nrs@usda.gov.

NRS roles determine what a user can view or edit within the system. Additional permissions, such as Organizational or Financial Administrator, can be added to any role within NRS. The following table provides information for all roles and permissions available in NRS for Land-grant Universities, partner organizations and grantees.

FOR ORGANIZATIONAL ADMINISTRATORS

A step-by-step User Management Module tutorial is available in the NRS Learning Community to guide you through adding users, editing roles, assigning permissions, and archiving accounts.

Table 2. Roles and Associated Permissions in NRS

Role	Description	Permissions
Director	The Director role is assigned to senior research or Extension leadership within the organization. Directors are responsible for overseeing NRS reporting, submitting to NIFA, and ensuring compliance with AREERA reporting requirements (if applicable). Directors can manage research projects and Extension programs, and Results. For AREERA-funded institutions, Directors can create and modify Critical Issues, Plan of Work, and the Annual Report of Accomplishments. Directors within institutions that do not receive AREERA funding will not have Critical Issues, Plan of Work, or the Annual Report of Accomplishments modules.	▪ **Critical Issues (AREERA only)**: Add, Edit, View and Close Out ▪ **Plan of Work (AREERA only)**: Create, Edit, Review, Sign and Submit to NIFA Review ▪ **Projects and Programs**: Add, Edit, Return, Remove (if unapproved by NIFA), Submit for Org Review and NIFA Review, and Retract from NIFA Review ▪ **Results**: Add, Edit, Review, Return, Remove (if unapproved by NIFA), Submit, and Highlight ▪ **Annual Report (AREERA only)**: Create, Edit, Review, Sign and Submit to NIFA Review ▪ **Financial Reporting**: View submitted Financial Reports and approved OGFM Supplemental Forms (if applicable)
State Contributor	State Contributors are institution- designated staff that support the Director by preparing and entering data. They can manage the reporting workflow for Plans	▪ **Critical Issues (AREERA only)**: Add, Edit, View and Close Out ▪ **Plan of Work (AREERA only)**: Create, Edit, and Submit to Org Review

	of Work, Annual Reports, Projects/Programs and Results. State Contributors are often coordinators or technical staff who ensure reports are complete and accurate before Director review and signature.	▪ **Projects and Programs**: Add, Edit, Remove (if unapproved by NIFA), Submit for Org Review or NIFA Review, and Retract from NIFA Review ▪ **Results**: Add, Edit, Review, Remove (if unapproved by NIFA) ▪ **Annual Report (AREERA only)**: Create, Edit, and Submit to Org Review ▪ **Financial Reporting**: View submitted Financial Reports and approved OGFM Supplemental Forms (if applicable)
Project Director/Initiator	Project Directors (PDs) and Initiators (for Extension programs) are the primary individuals responsible for conducting research and Extension activities. They are designated by the organization to enter and manage project/program information and report annual and final Results (progress) in NRS for accessions they are assigned to. **Co-Project Directors/Initiators:** Organizations may also assign Co-Project Directors (Co-PDs) or Co-Initiators (Co-Is) to the accession to support the project/program. Co-PD/Is have view only access by default. However, Co-PD/Is that are given Edit permissions will have all the same capabilities as the PD/I for that accession, including the ability to edit and enter Results.	▪ **Research Projects and Extension Programs**: Add, Save, Edit, and Submit assigned accessions to Org Review; View all accessions within the organization ▪ **Results**: Add and Edit Annual and Final Results for assigned accessions and View all Results within the organization ▪ **Critical Issues, Plan of Work and Annual Report (AREERA Only):** View approved reports ▪ **Financial Reporting:** View submitted Financial Reports and approved OGFM Supplemental Forms (if applicable)
Assistant Organizational Administrator	Assistant Organizational Administrators (AOAs) support administrative functions within the organization. They can edit and manage projects, programs and Results but cannot manage users.	▪ **Projects and Programs:** Add, Save, Edit, Submit to Organizational and NIFA Review ▪ **Results**: Add, Edit, and View Annual and Final Results ▪ **Critical Issues, Plan of Work and Annual Report (AREERA Only):** View approved reports ▪ **Financial Reporting:** View submitted Financial Reports and approved OGFM Supplemental Forms (if applicable)

View Only	View Only users can access approved information within NRS but cannot add, edit or submit data. This role should be assigned to staff who need access to NRS, but are not responsible for data entry or approvals. **Note:** View Only users that are assigned additional permissions such as Financial Administrator or Organizational Administrator will gain the corresponding privileges (such as adding users and submitting reports), regardless of their role.	▪ **Projects and Programs:** View approved research projects and Extension programs and the change log ▪ **Critical Issues, Plan of Work and Annual Report (AREERA Only):** View approved reports ▪ **Financial Reporting:** View submitted Financial Reports and approved OGFM Supplemental Forms (if applicable)

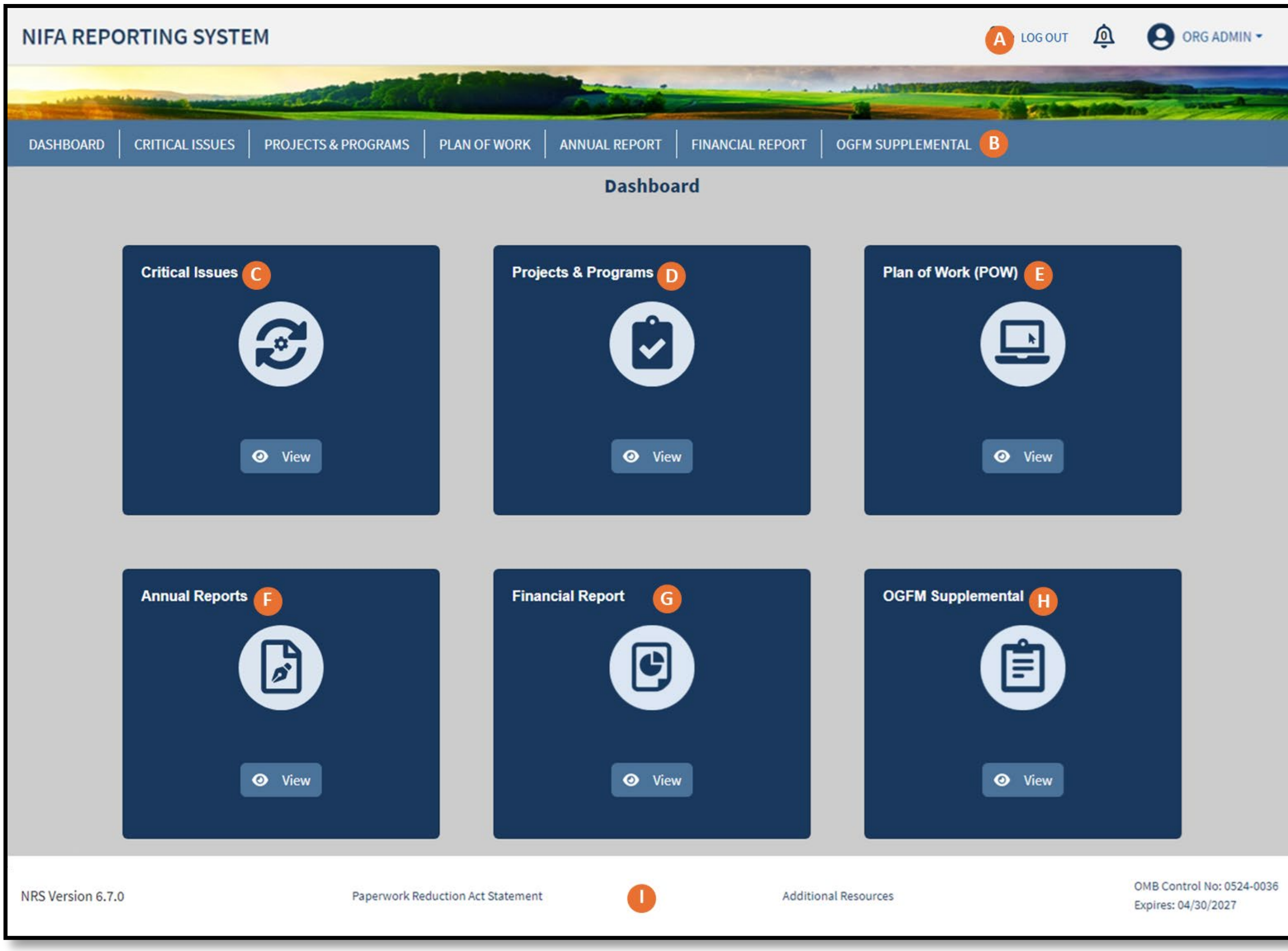
Table 3. Special Permissions for NRS

	Description	Permissions
Organizational Administrator	Organizational Administrators (Org Admins) manage roles for their institution. They are responsible for creating and modifying user accounts and archiving (removing access) for users when appropriate. **Note:** The combination of the View Only role and Org Admin permissions will have the same reporting capabilities as an AOA role with Org Admin permissions.	▪ **User Management:** View, Edit and Modify user roles, permissions and funding; Archive users
Financial Administrator	Financial Administrators are responsible for entering, validating, signing and submitting financial reporting documents in NRS. This includes the Financial Report for Capacity Funds and OGFM Supplemental Form (for specific 1862 LGUs only). Financial Administrator permissions only apply to the Financial Reporting and OGFM Supplemental (if applicable) modules and do not extend to other modules in NRS.	▪ **Financial Reporting:** View, Add, Edit, Retract, Validate, Sign and Submit for Organizational Review and Submit to NIFA ▪ **OGFM Supplemental Form (for appliable 1862 LGUs only):** Add, Edit, Retract, Sign, Submit for Organizational and NIFA Review

NRS DASHBOARD & NAVIGATION BASICS

DASHBOARD

After successfully logging into NRS, users are directed to the Dashboard.



A) **Log Out, Exports, and User Menu:** Click on your name to open your user menu. Menu options depend on your user account's permissions.

B) **Top Menu Bar:** This blue bar menu at the top of your screen will be present from all NRS screens, but options may vary depending on your organization and access.

C) **Critical Issues:** Click "View" to open a dashboard where you can access the Critical Issues of your state.

D) **Projects/Programs:** Click "View" to open a dashboard where you can access your organization's projects and programs related to your funding.

E) **Plan of Work (POW):** Click "View" to access the Plan of Work module. This module is for Land-grant Universities that have state level AREERA reporting requirements.

F) **Annual Reports:** Click "View" to access the Annual Report module. This module is for Land-grant Universities that have state level AREERA reporting requirements.

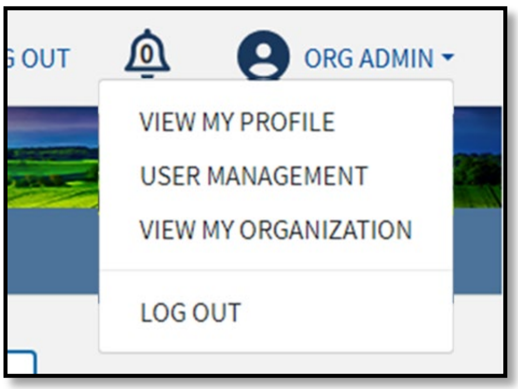
G) **Financial Report:** Click "View" to access the Financial Report module. All organizations will have Financial Report for accession-level yearly expenditures and FTEs.

H) **OGFM Supplemental:** Only organizations with legislatively mandated target spending percentages will have access to the OGFM Supplemental module.

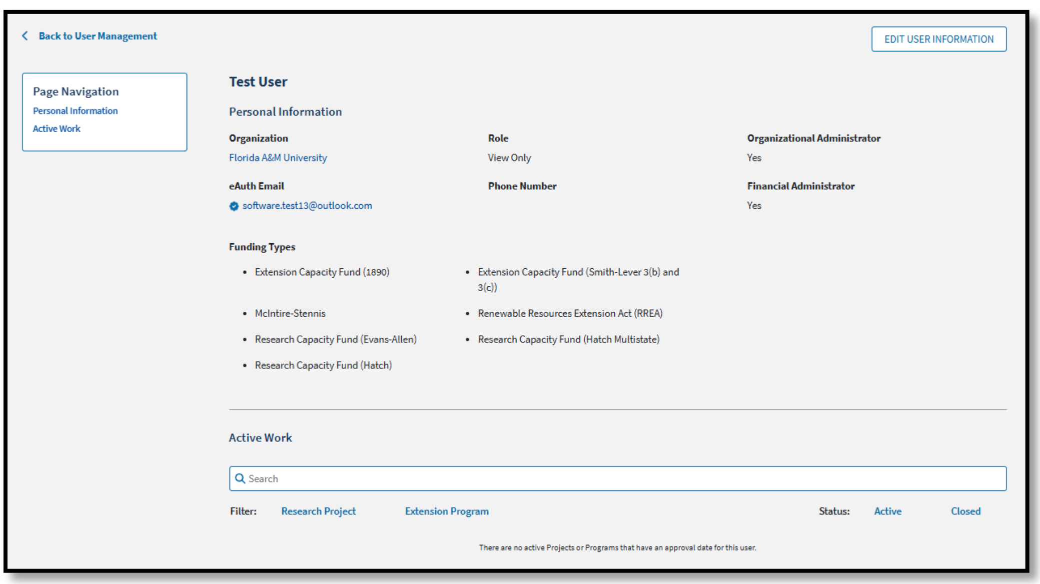
I) **Footer:** The footer contains the current version of NRS, information on Paperwork Reduction Act compliance, and a link to the NRS website for additional resources for users. This footer is present on the bottom of all NRS screens.

USER MENU

Access the user menu by clicking on your name in the upper right corner. The dropdown user menu for all users includes View My Profile, View My Organization, and Log Out. Users with Org Admin permissions will also have User Management.



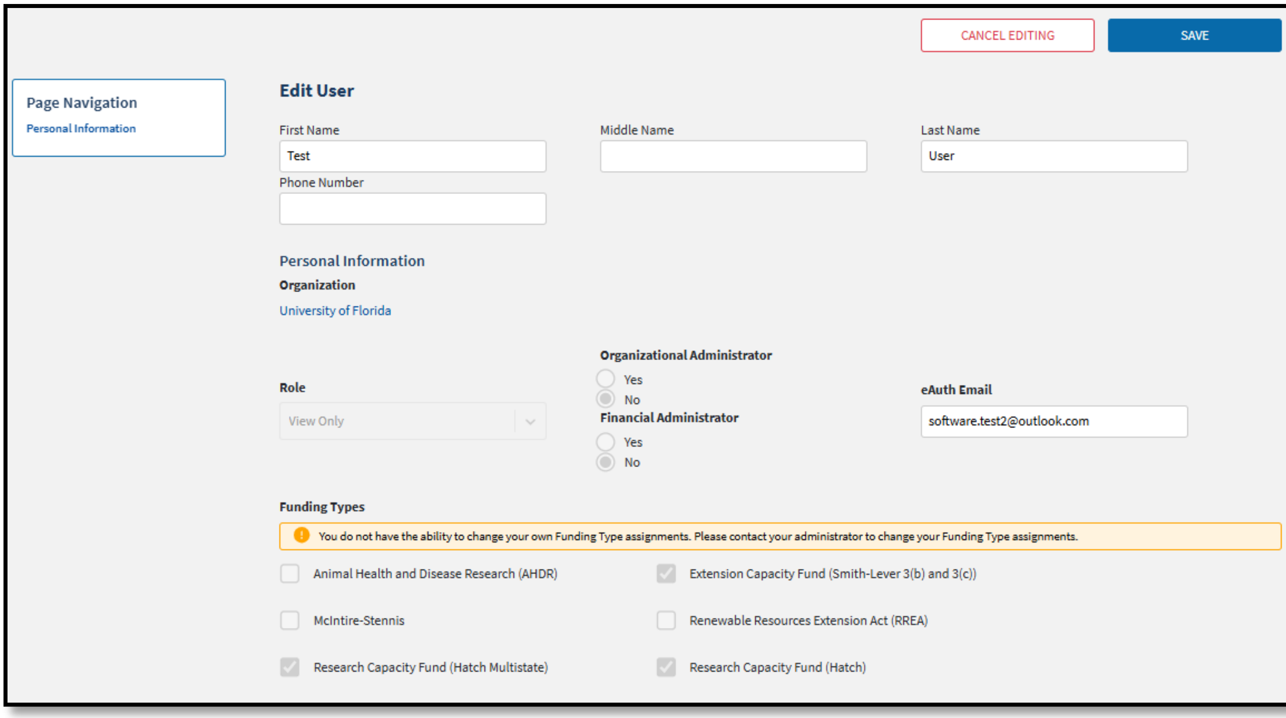
View My Profile & Edit User Information



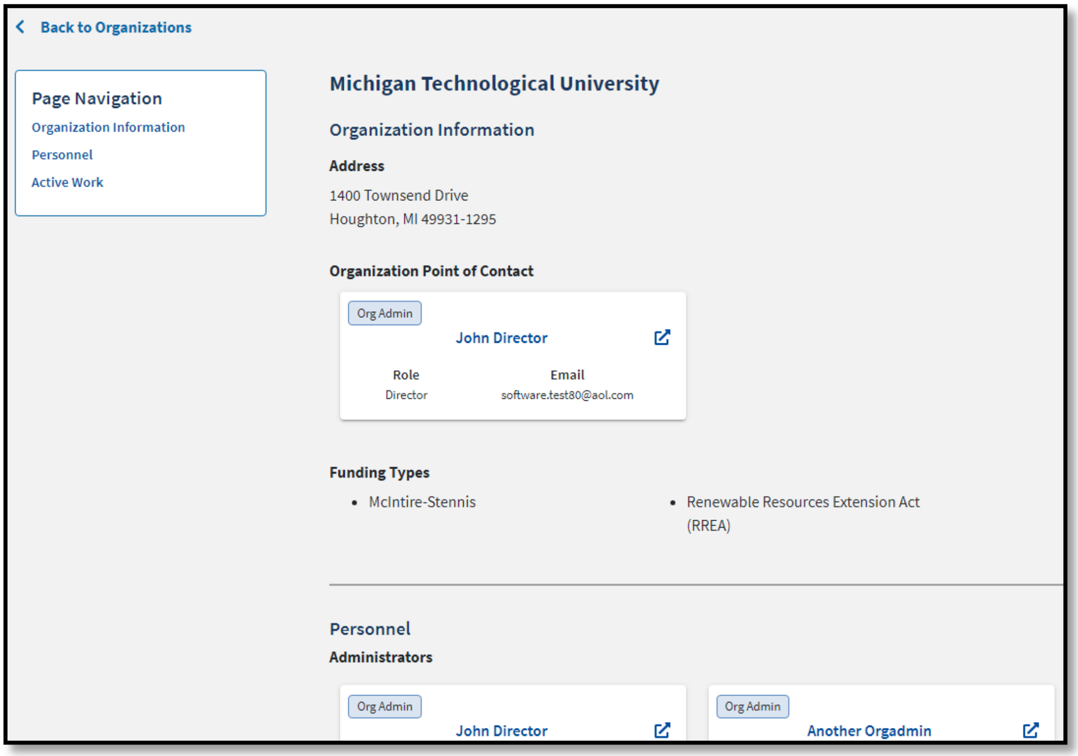
Under the user menu, View My Profile shows the details of your user account with a left side menu to jump to the different sections:

- **Personal Information**: Name, Organization, NRS Role, Organizational Administrator & Financial Administrator status, eAuth Email (with a green checkmark icon if the user has successfully logged into NRS at least once or with a red X icon if they have not yet logged into NRS), Phone Number, and associated Funding Types for access
- **Active Work**: a list of accessions associated with the user as Project Director and Initiator or Co-Project Director and Co-Initiator; may be searched or filtered by Research Project or Extension Program and/or Active or Closed status

The Edit User Information button in the upper right corner may be selected to make limited edits to the user information. Org Admins can edit additional fields and are able to archive users. Changes to the fields will not be saved unless the Save button is selected.



View My Organization



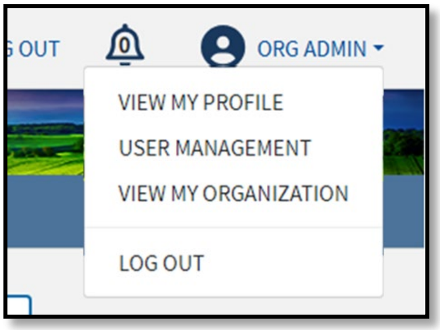
Under the user menu, View Organization shows the details of your organization with a left side menu to jump to the different sections:

- Organizational Information
    - Address
    - Organization Point of Contact: this is set by your Org Admins and may just say "No point of contact added."
    - Funding Types: all funding types that your organization are eligible to receive
- Personnel
    - Administrators: a list of all the active Org Admins if you need assistance
    - Members: a list of active (non-archived) users for the organization; may be filtered by User Role (Director, Project Director, State Contributor, View Only, and Assistant Org Admin)
- Active Work
    - Critical Issues: this information is only present for organizations with AREERA funding that submit a Plan of Work
    - Projects and Programs: a list of accessions that may be filtered by research project or Extension program

ORGANIZATIONAL ADMINISTRATOR USER AND ORGANIZATION MANAGEMENT

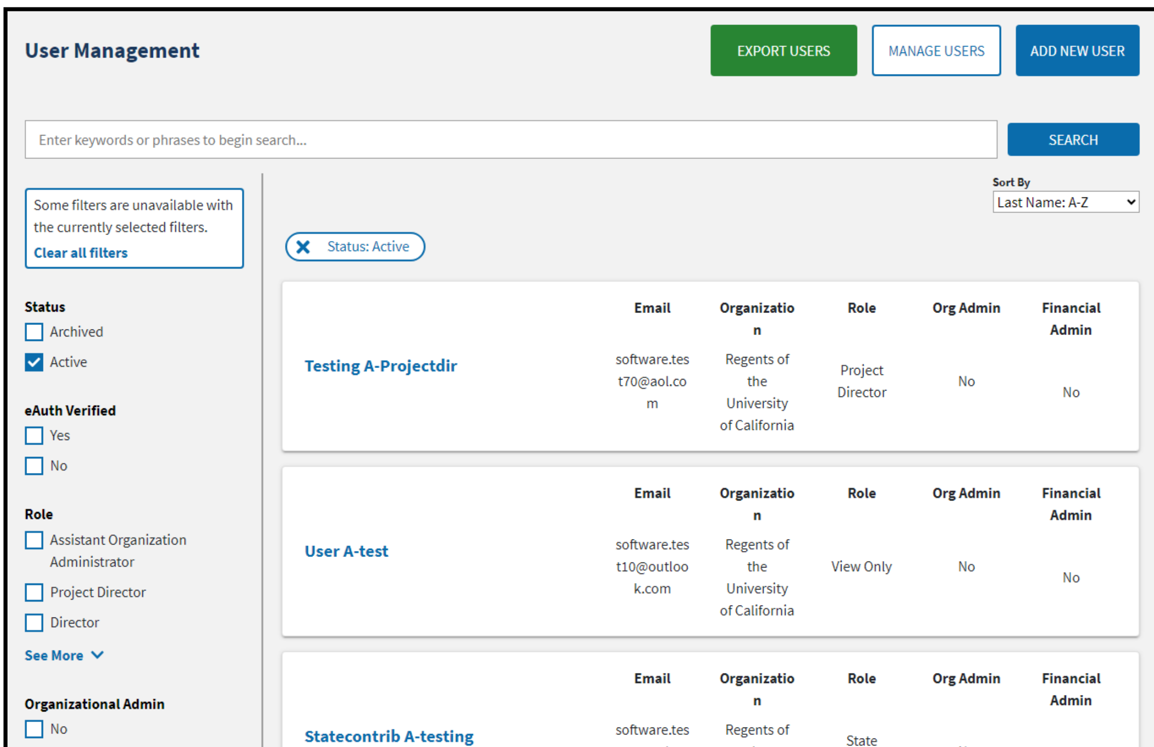
USER MANAGEMENT

Only users with Organizational Administrator permissions for NRS can access the User Management module by clicking on their name in the upper right corner and selecting User Management from the dropdown menu.



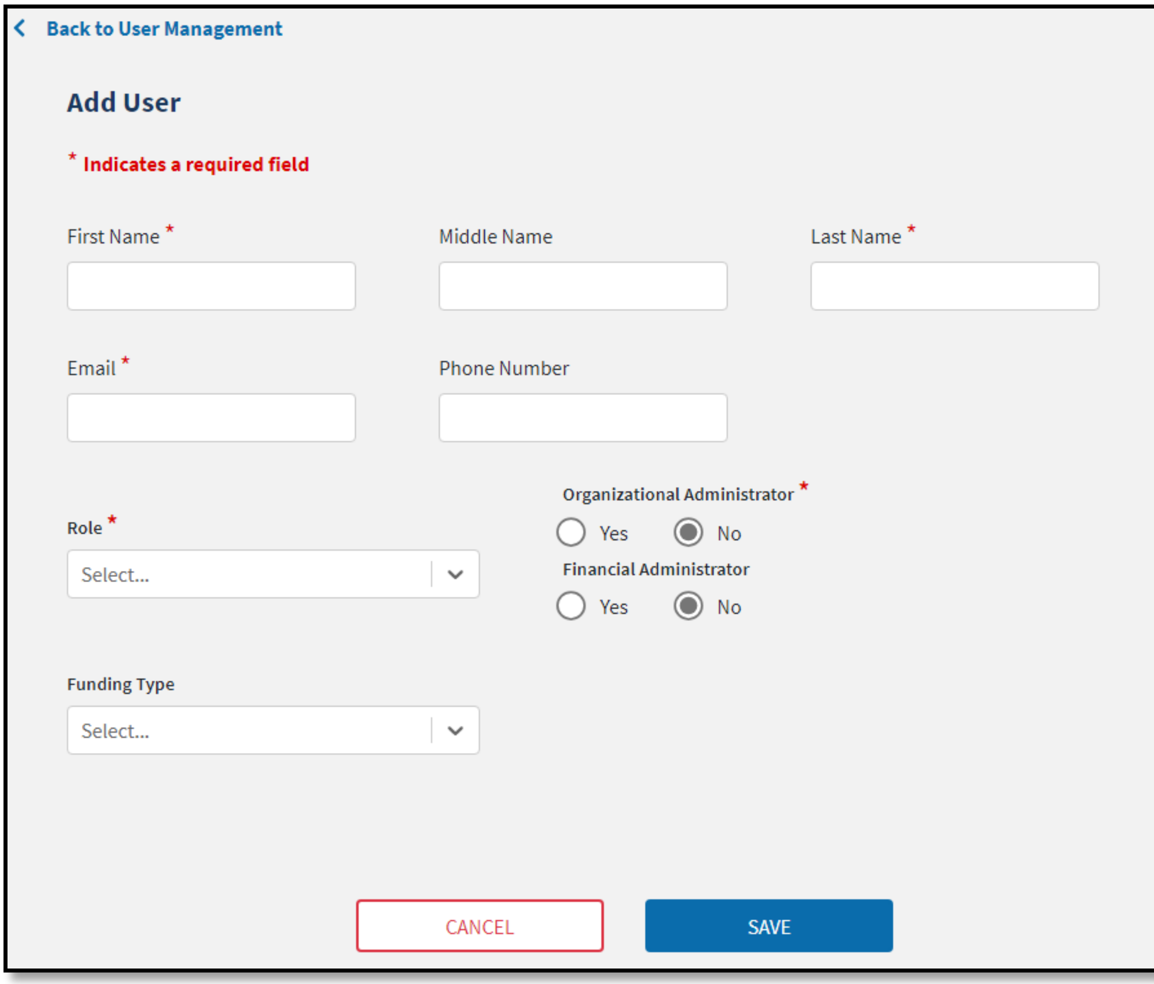
Adding Users

1. Once in the User Management module, you can then click on "Add New User" on the top right of the page.



2. Once on the Add User page, fill in the fields.

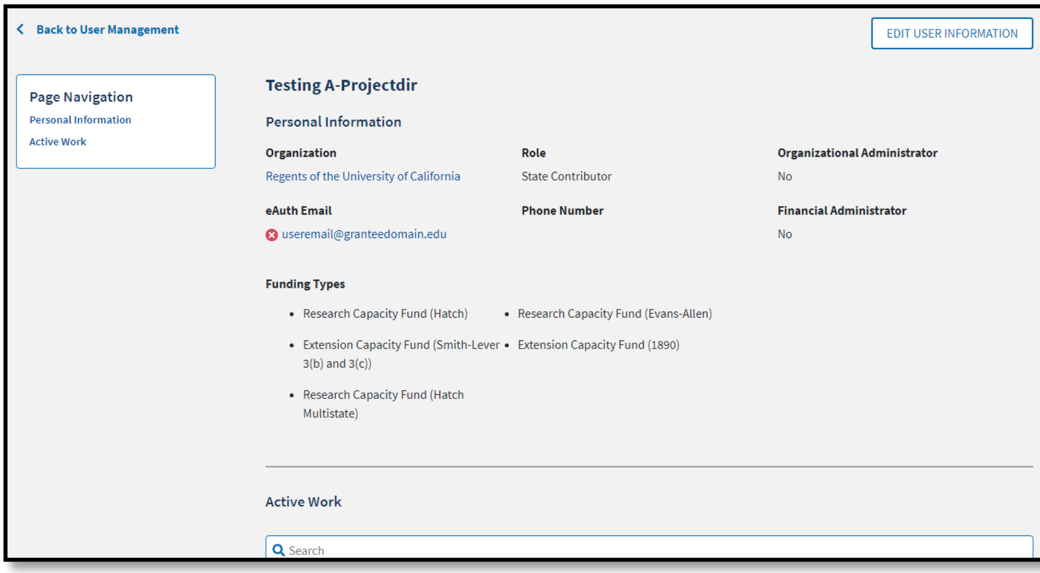
- The First Name, Last Name, Email, and Role fields are required.
- Middle Name and Phone Number are optional fields.
- Organizational Administrator and Financial Administrator permissions both default to No, but Yes may be selected if appropriate for the user. Please note that Assistant Organizational Administrators cannot be granted Organizational Administrator permissions, all other roles are compatible with those permissions.
- Also optional is adding access to specific Funding Types by selecting them from the menu; this controls which users are included in the Project Director/Initiator dropdown menu for the different accession funding type.



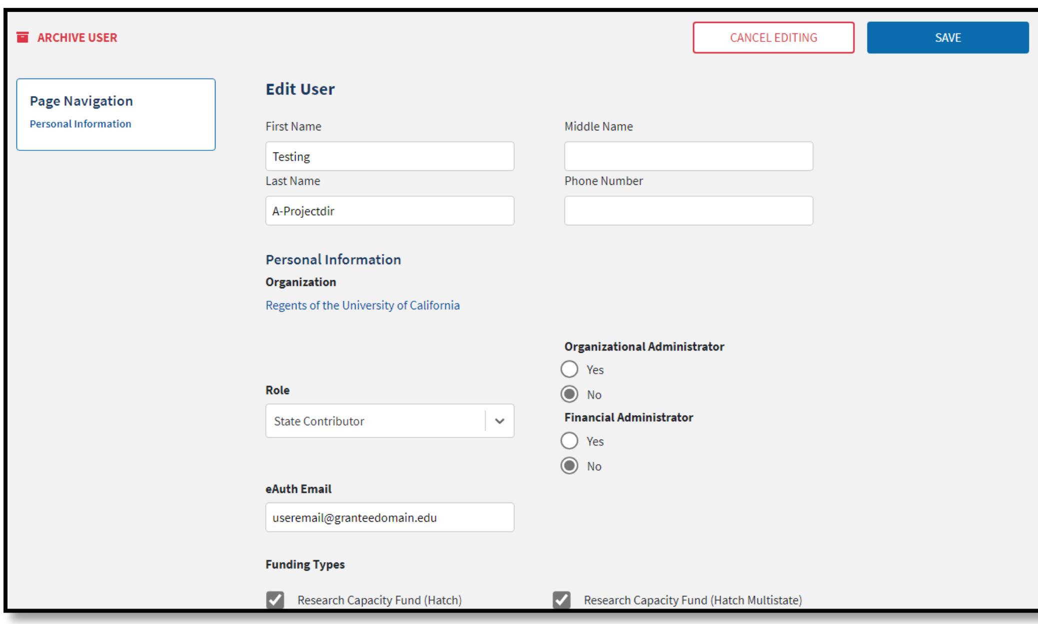
3. After completing all required fields, click "Save" at the bottom of the screen to create the NRS account. Once the account has been saved, click "Back to User Management" to return to the main screen of the User Management page. Previously created users can be edited at any time if updates or corrections are needed.

Editing Users

1. Use any desired filters and/or search terms in the User Management module to limit the list of users on the screen. After selecting an account by clicking on the individual's name, you can then select "Edit User Information" on the top right of the page.

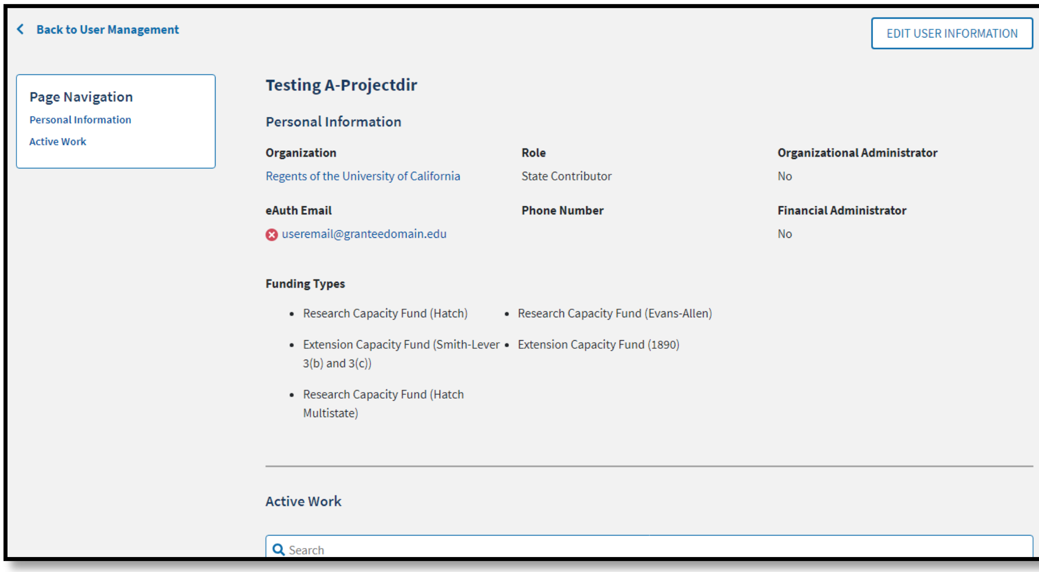


2. After selecting "Edit User Information," you can make edits to the fields below. The Organization field cannot be changed. Also, the eAuth Email field can only be edited if there is a red "x" next to the email address before entering the Edit User screen. After the edits are complete, select "Save" at the bottom of the page.

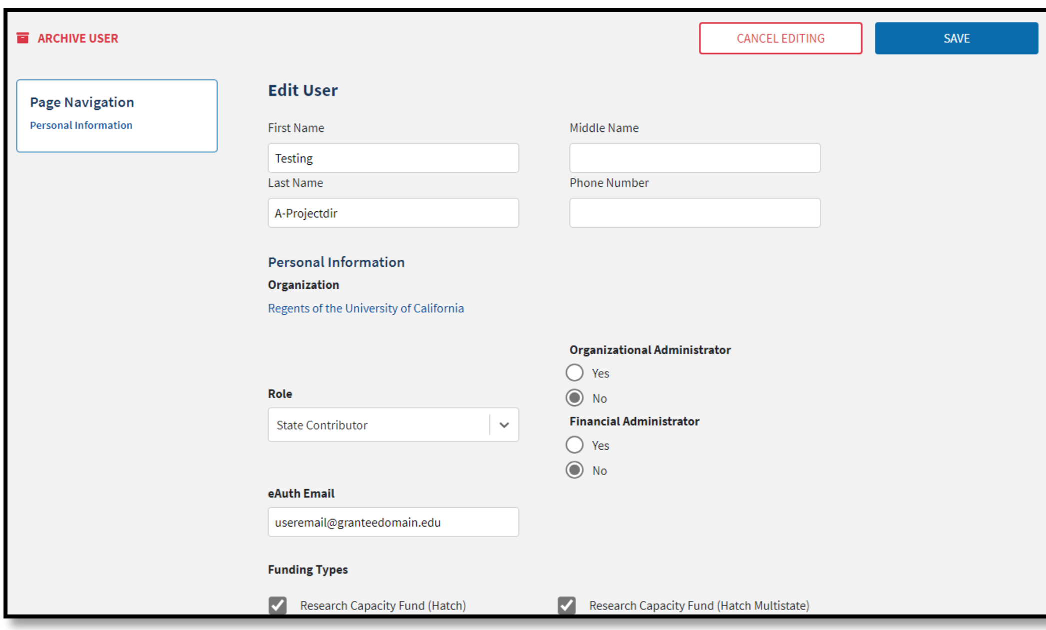


Archiving Individual Users

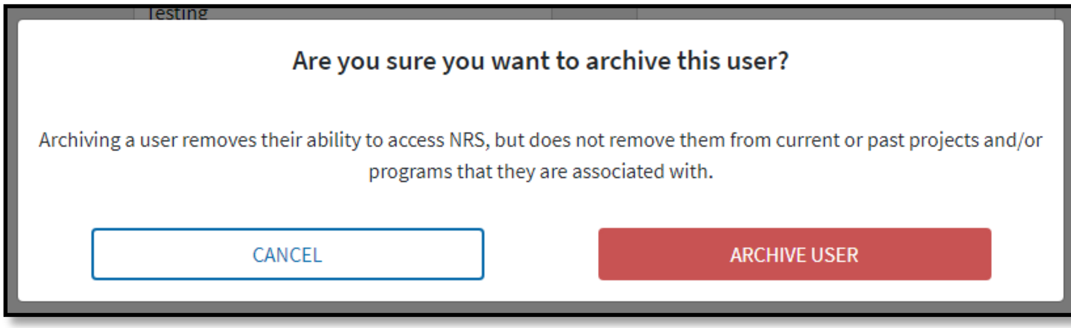
1. After navigating to the User Management module and selecting a specific user account, select “Edit User Information.”



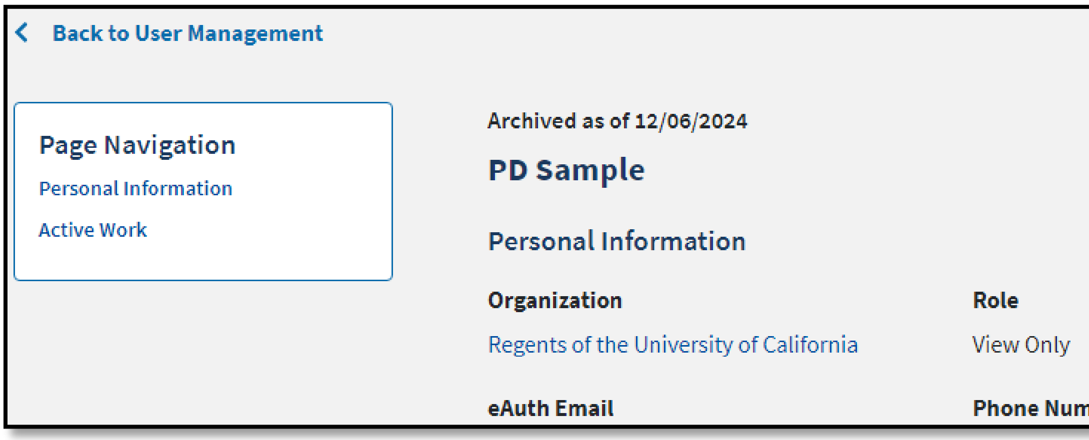
2. From there, you can then select “Archive User” on the top left side of the page.



3. A confirmation menu will pop-up and you can select "Cancel" or "Archive User."

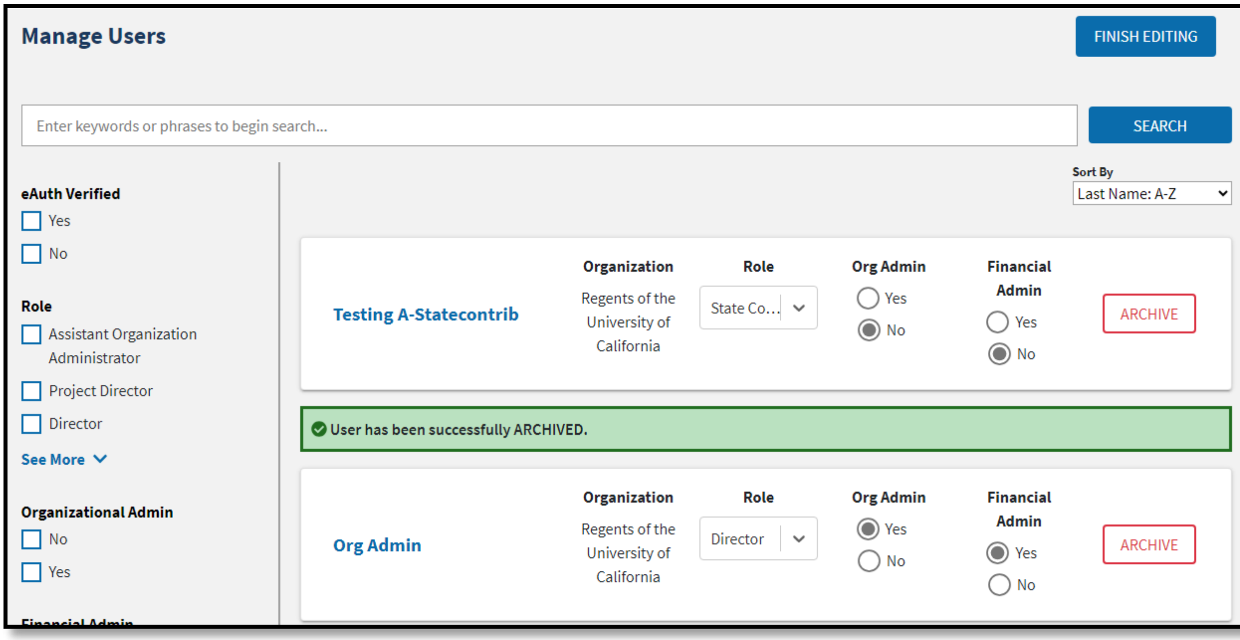


4. After archiving a user, the archived message will immediately display above the name on that user account. Archiving a user will remove access to NRS for that user account, and archived users can no longer be added as Project Director/Initiator to Projects and Programs. The archive action cannot be undone, if you have archived a user in error you will need to add another user record for them.



Manage Users

Within the User Management module, an Organizational Administrator can also opt to use the Manage Users button to change certain information for several users at a time. Editable fields in Manage Users include Role, Org Admin, and Financial Admin selection, as well as an Archive button. The Archive button works immediately upon confirming the action, but the other field changes will not save until the Finish Editing button is selected.



Transferring Users

NRS System Administrators can transfer users from one organization to another. This transfer does not include moving any associated accessions. Existing accessions will need to be edited to update the end date if needed, and any continuing work will need to be created as new accessions under the new organization. To request a user transfer, please email the name, current email, new organization, and new email (if known) to the NRS Help Desk (nrs@usda.gov).

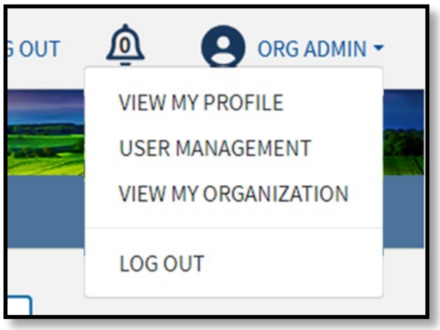
Alternatively, you may archive the user leaving your organization and the new organization will create a new account for them when appropriate. The System Administrator transfer function is just a streamlined method of performing both actions.

ORGANIZATIONAL POINT OF CONTACT (POC)

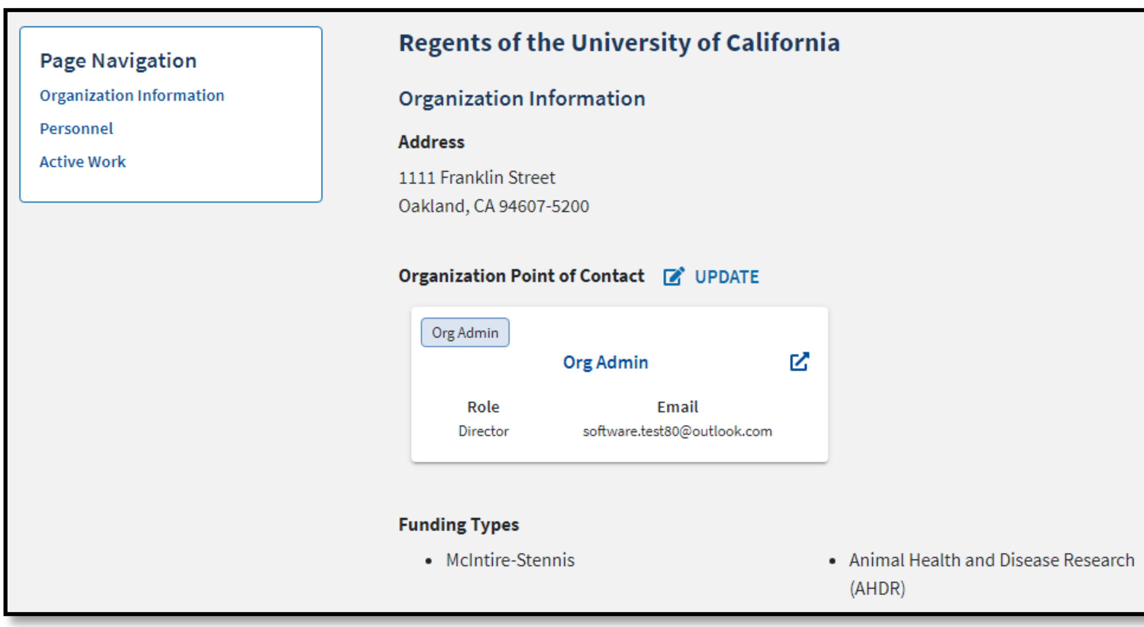
An Organizational Point of Contact (POC)is a designated user responsible for receiving communications from NIFA on behalf of your organization. By having one or more POC selected for your organization, communications between your organization and NIFA will be streamlined if there is an NRS specific question. Org Admins can update the POC by adding or removing users with an Org Admin, Director, or State Contributor role. There is no limit on POCs.

To Add or Remove POCs

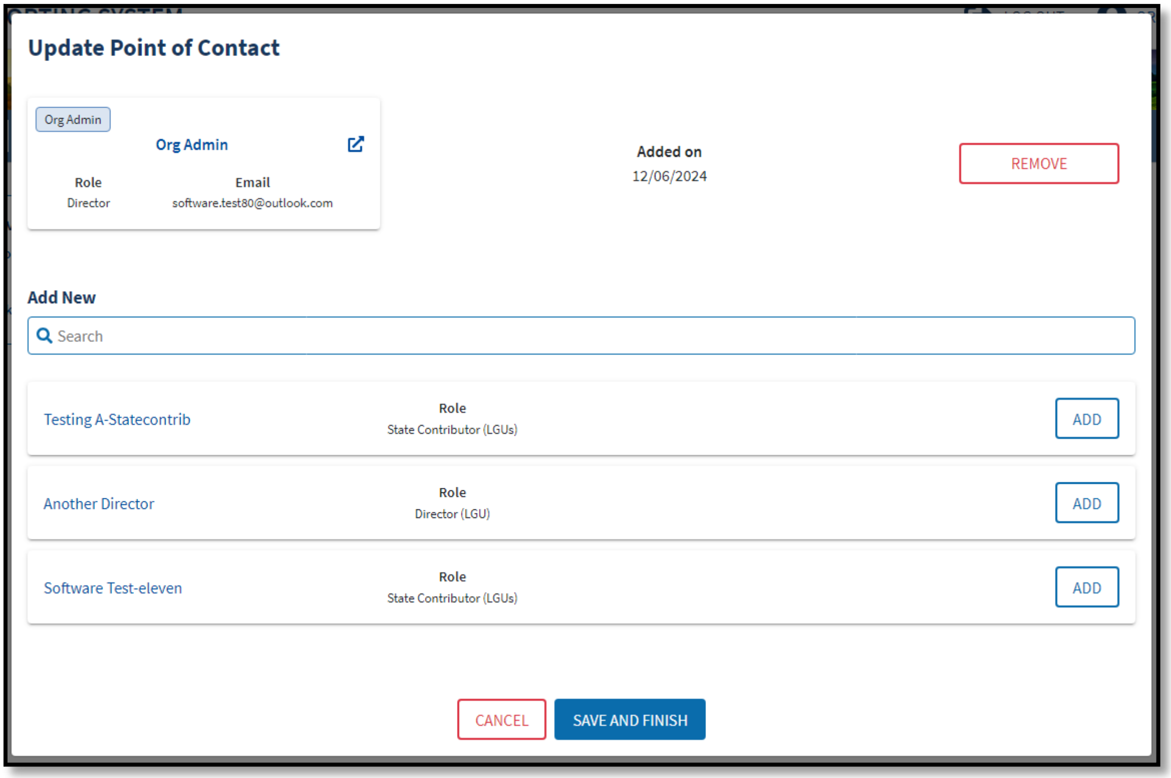
1. From your user menu, select View My Organization.



2. Click on Update in the Organization Point of Contact section.



3. Add or remove users to the Point of Contact list and select Save and Finish to complete your changes.



PLAN OF WORK (AREERA ONLY)

Land-grant Universities who receive capacity grants covered under the Agricultural Research, Extension, and Education Reform Act of 1998 (AREERA) are required to complete a high-level, five-year Plan of Work (POW) covering research and Extension activities. AREERA capacity funding includes:

- Capacity grants authorized under the Hatch Act (both Regular Hatch and Hatch Multistate) for research activities at the 1862 Land-grant institutions and the University of the District of Columbia,
- Section 3(b) and (c) of the Smith-Lever Act for Extension activities at the 1862 Land-grant institutions, and
- Sections 1444 and 1445 of the National Agricultural Research, Extension, and Teaching Policy Act of 1977 (NARETPA) for research and Extension activities at the 1890 Land-grant institutions, including Tuskegee University, West Virginia State University and Central State University

The POW begins with an Executive Summary and then defines the Critical Issues impacting agriculture in the state or territory, Merit/Peer Review Processes, and Stakeholder Input. POWs must also describe their research Projects and Extension Programs.

Yearly submission and NIFA approval of the POW is required for institutions to receive AREERA capacity funding.

PLAN OF WORK MODULE

Plan of Work Module Permissions

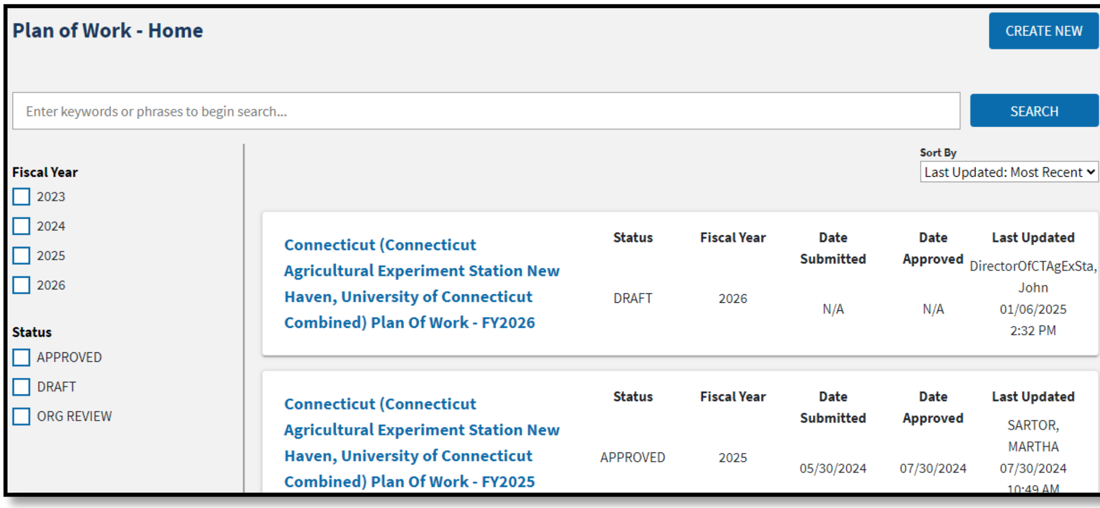
Below are the user roles and permissions for the Plan of Work module.

Table 4. Plan of Work User Permissions

User Role	Permission
Director	Create, Edit, Submit for Organizational Review, Submit for Organizational Review, Sign the Report submit to NIFA Review
State Contributor	Create, Edit, Submit for Organizational Review. Note: State Contributors cannot sign the Plan of Work to submit for NIFA Review
All Roles within the Organization	View and Print Approved Plans of Work

Starting a New POW or Editing an Unapproved POW

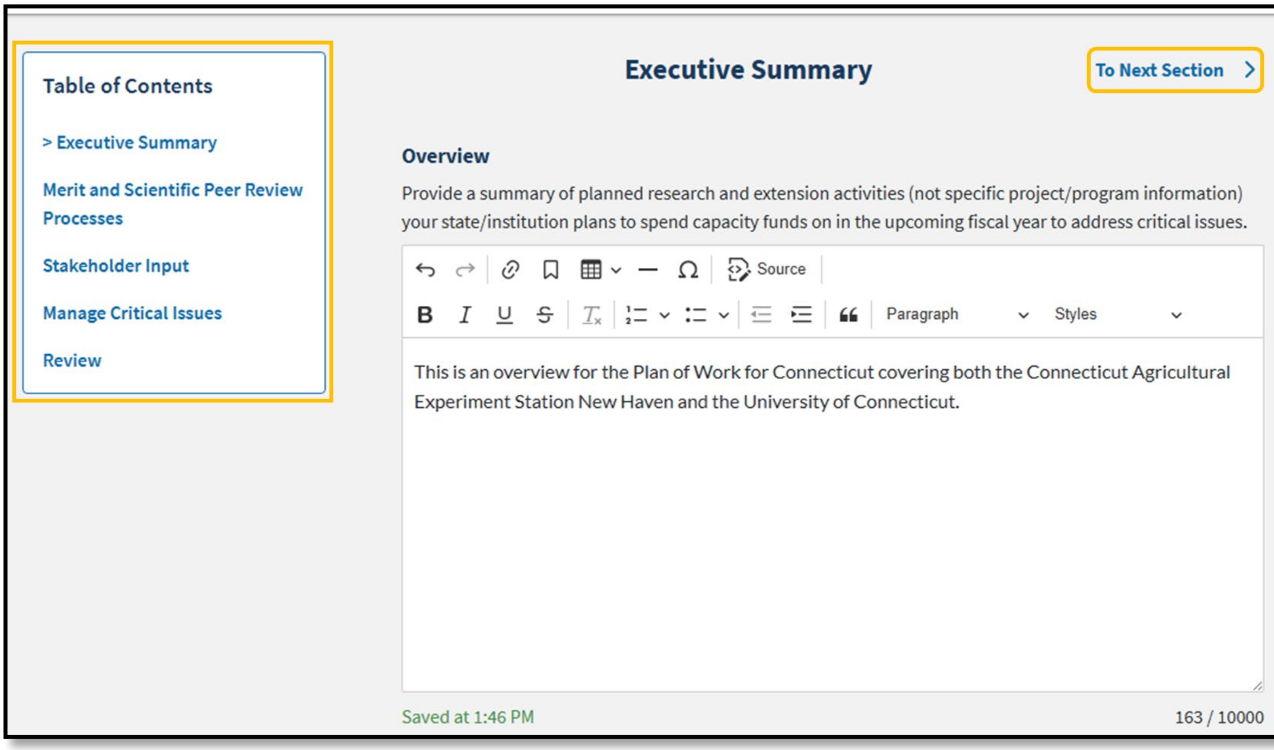
1. Click on Plan of Work on the NRS Dashboard. If you see the intended fiscal year's POW on the list, click on the POW title in blue to edit the POW and go to step 3. Proceed to step 2 if the correct fiscal year is not showing. The POW can only be edited by users with a Director or State Contributor role.
2. If a POW for the current reporting fiscal year is not listed, click the Create New button in the upper right. If only one POW is missing, it will be created, and the system will open the draft report on the Report Details screen. If multiple POWs are missing, all of the outstanding reports will be created and you will need to click on the title of the correct fiscal year POW to enter the Report Details screen. If all available years have been created, "All Plans of Work for this organization have already been created." will display on your screen.



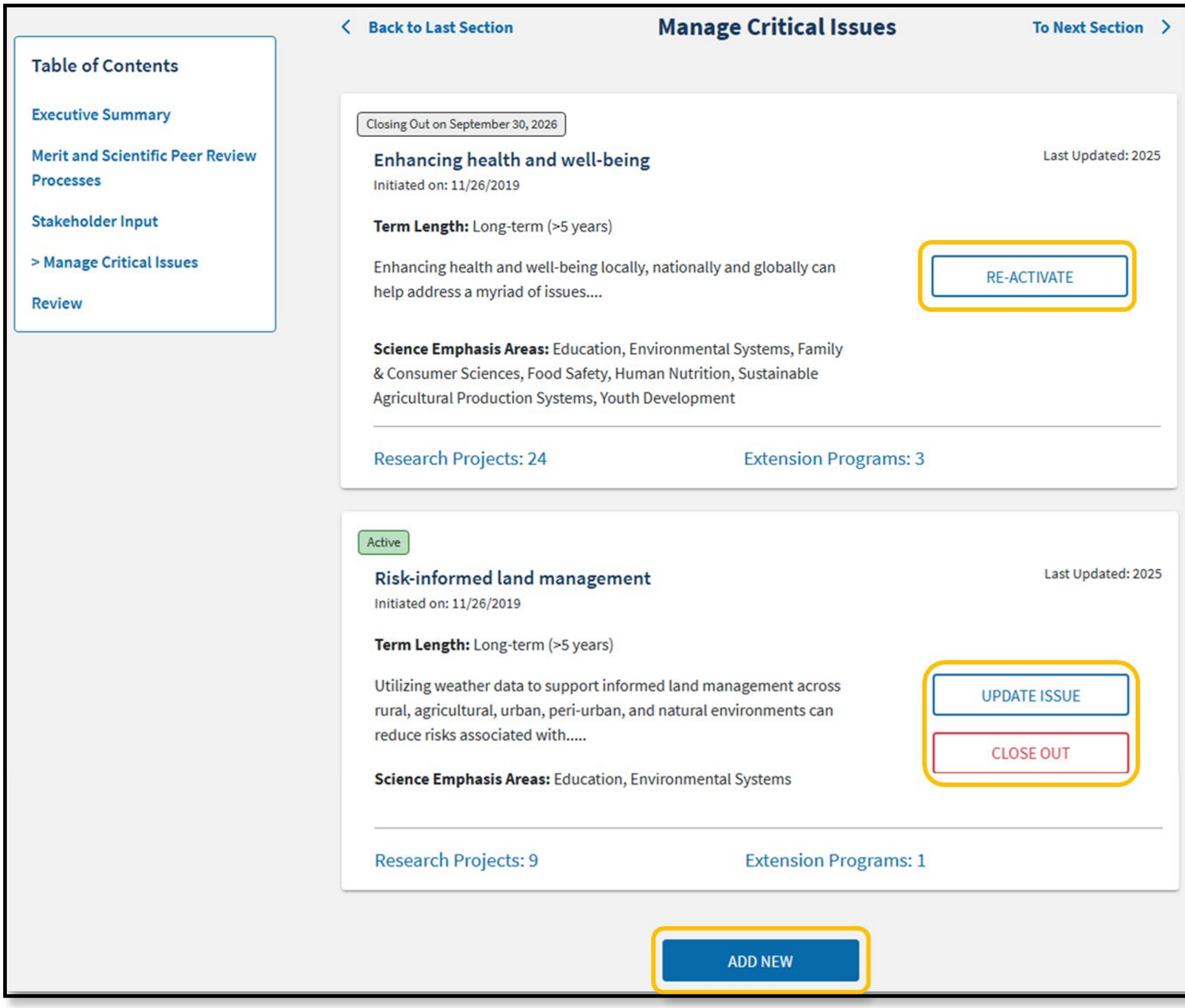
3. From the Report Details view click on the Start button (replaced with a Continue button once any information is saved) or click on one of the headings in the Table of Contents to enter the editing form.

4. The Plan of Work components covered in the next section of the guide will have entry boxes for each question. Please note that when you add or edit information, the bottom left under the text editor

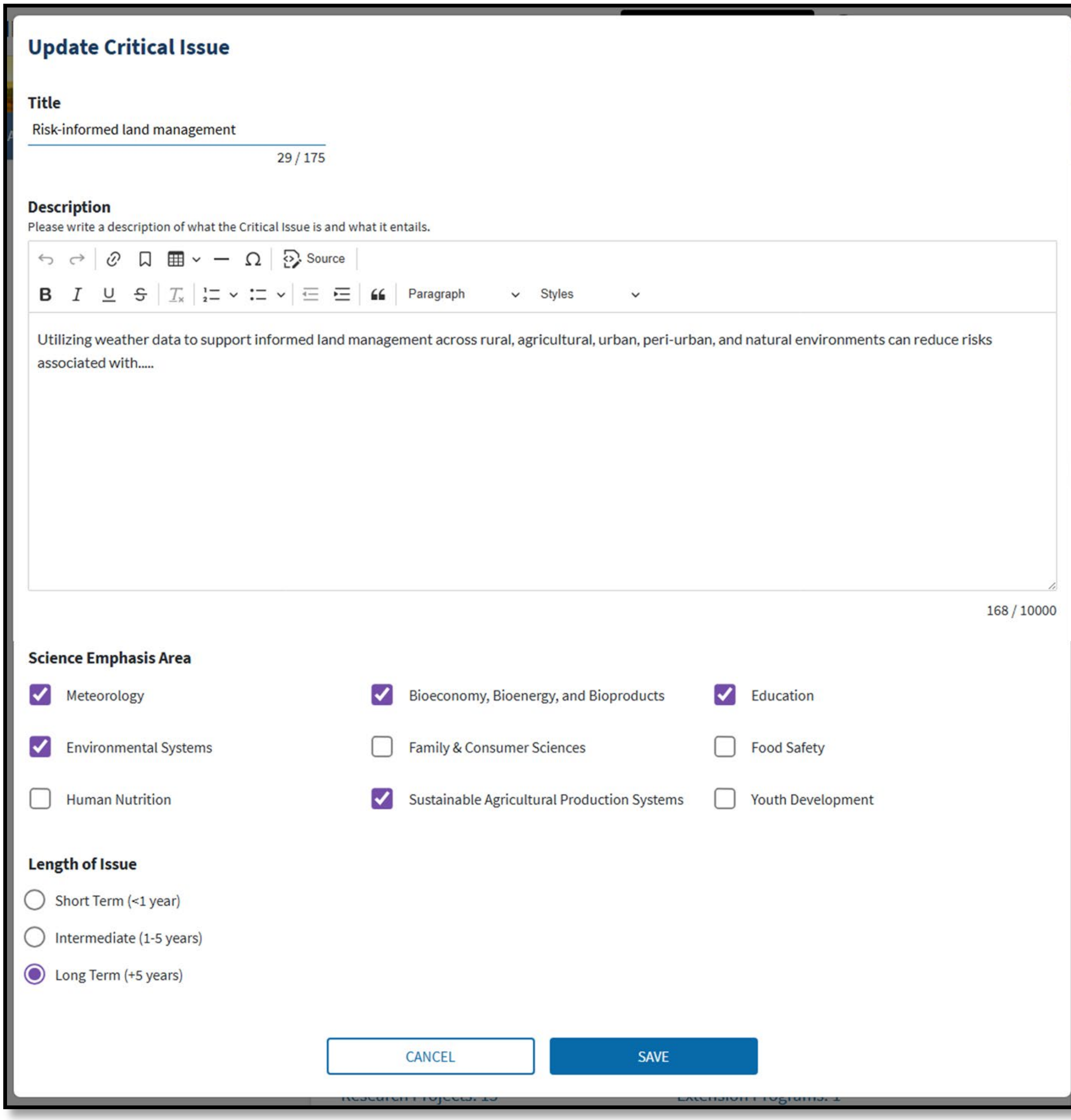
box should say Saved to confirm that your work is saved. We also advise users to draft their reports outside of NRS in a document to paste into NRS in case of technical issues. You can use the To Next Section link in the upper right or click on the sections in the Table of Contents to navigate within the Plan of Work.



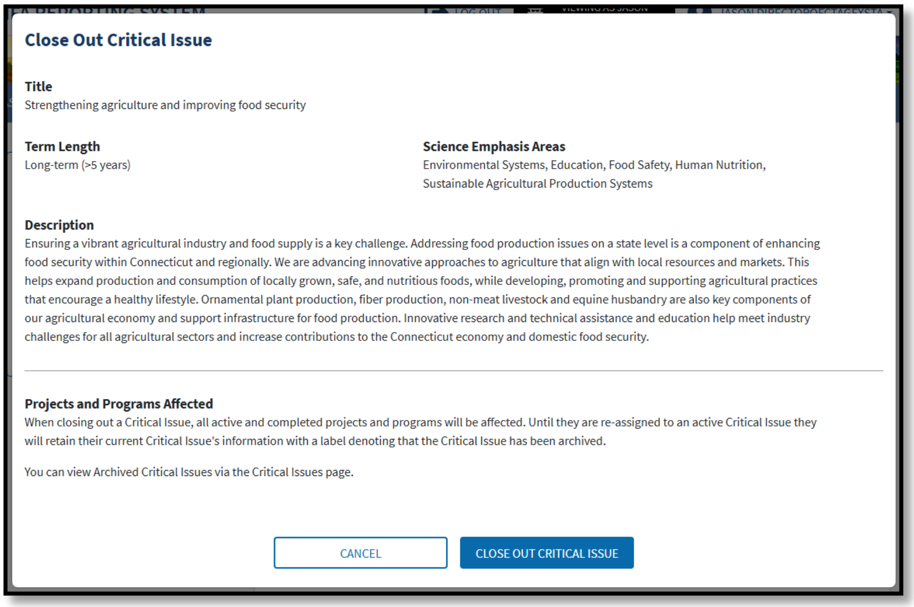
5. Unlike the other sections with an editor for text fields, Manage Critical Issues lists all active Critical Issues for your state regardless of whether your state's institutions report jointly or separately. If you report jointly, do not edit the Critical Issues that do not apply to your institution. Generally, joint reporting states that have separate Critical Issues distinguish between them by adding (1890) or (1862) at the end of the title. Within Manage Critical Issues you can Update Issues (edit the CI fields), Close Out/Re-Activate (let the CI close after the end of the POW period/undo marking the CI for closing out), and Add New.



a. Update Issue allows you to change information for the Critical Issue. Note: Edits to the Critical Issue will impact all Plans of Work that include the CI.

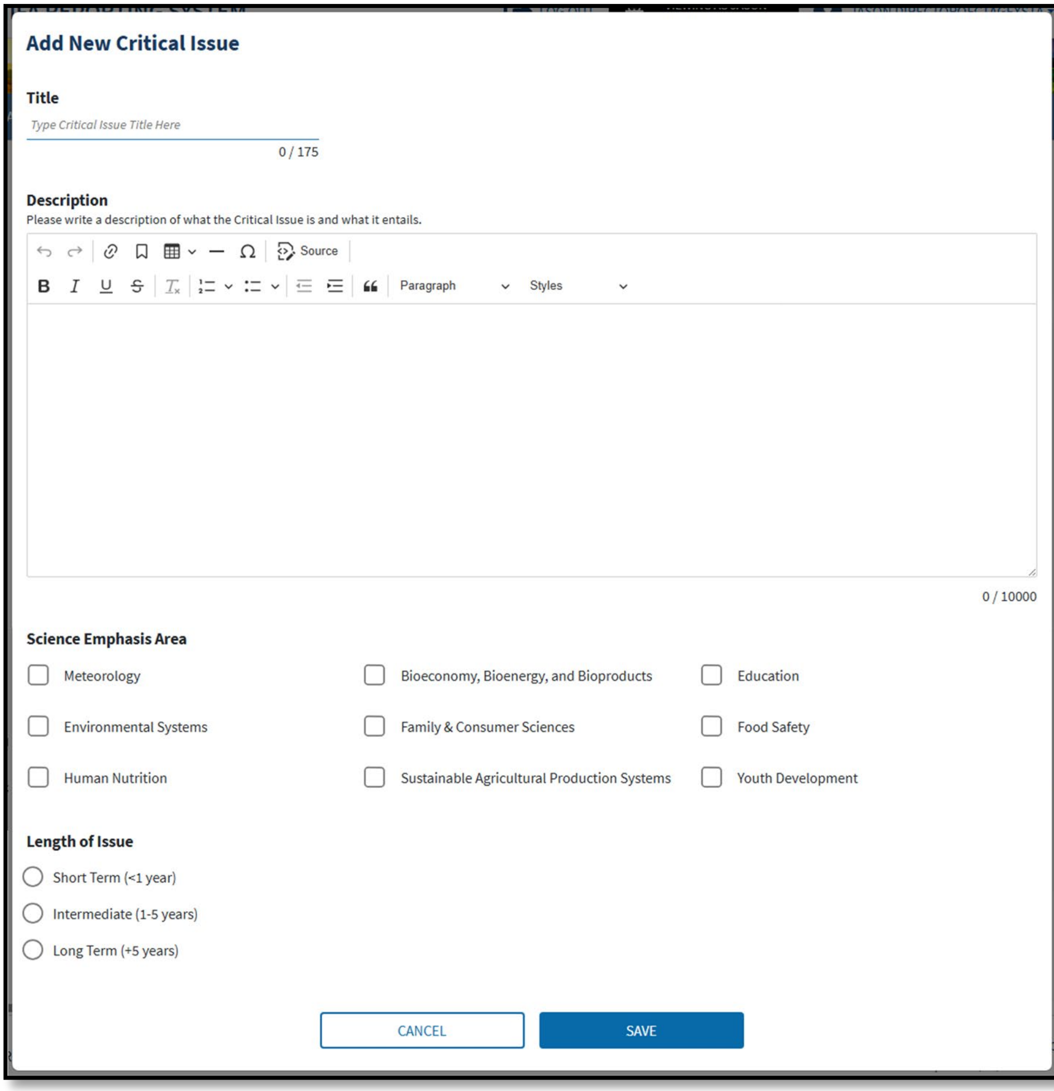


b. Selecting Close Out Critical Issue flags the Critical Issue to end at the conclusion of the Plan of Work fiscal year. For example, selecting Close Out from within the FY 2026 Plan of Work will flag the critical issue to end September 30, 2026. Once selected, a popup window will then appear asking you to confirm the close out.

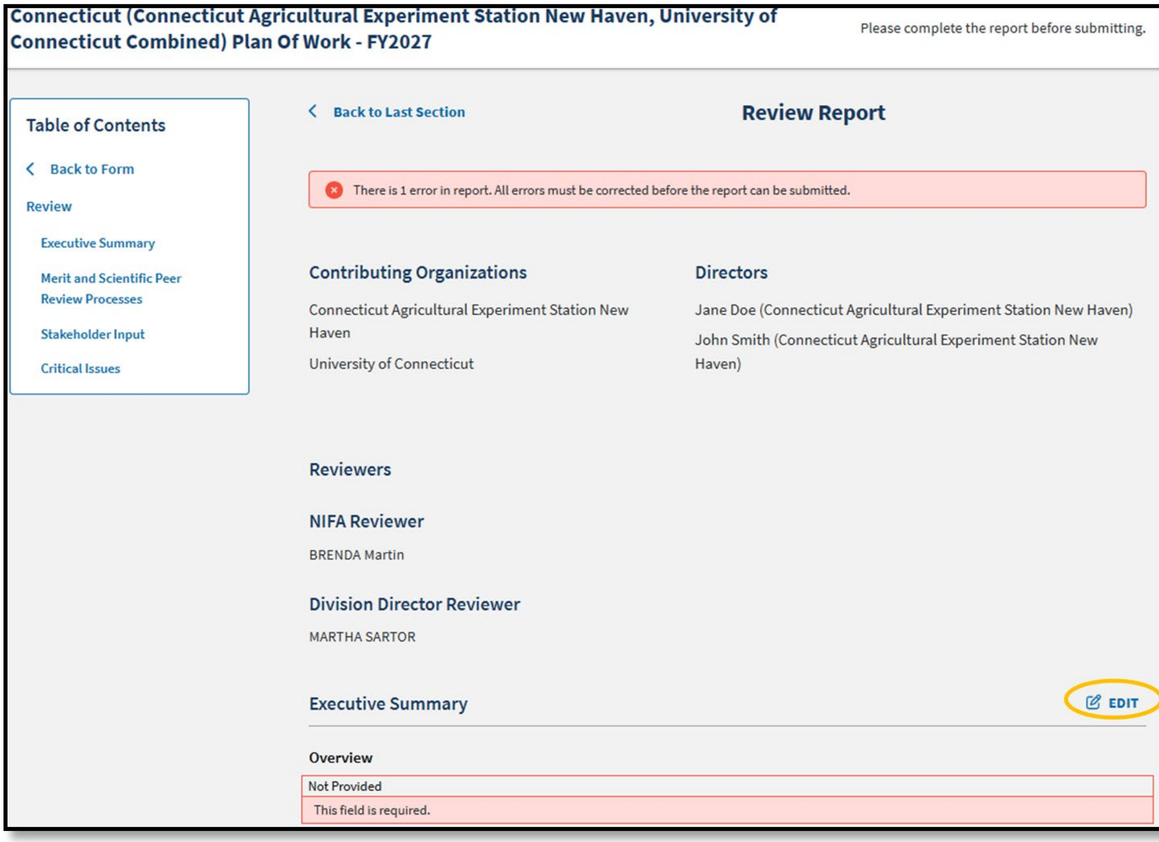


c. If a Critical Issue is marked as Closing Out, the Re-Activate button will allow you to undo that action. Re-activation does not require confirmation.

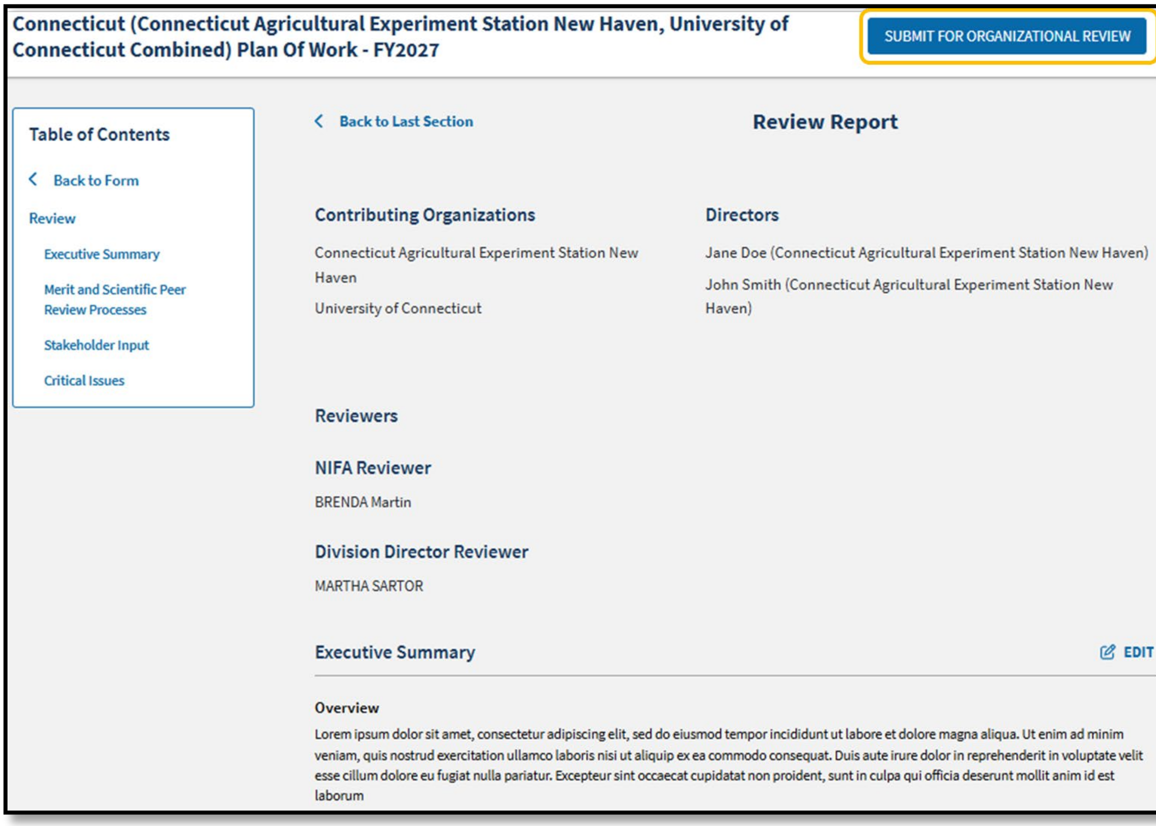
d. Add New Critical Issue allows an institution to include new agricultural problems that capacity funding will be used to address.



6. Once all the sections have been edited, the next stage is to Review Report. This screen will let you know if there are any errors that need to be addressed before submitting the Plan of Work. A summary of the total errors will be shown at the top and individual errors will be indicated in the body of the POW. To make corrections, click on Back to Form in the Table of Contents on the left and make your edits. Then return to Review Report.

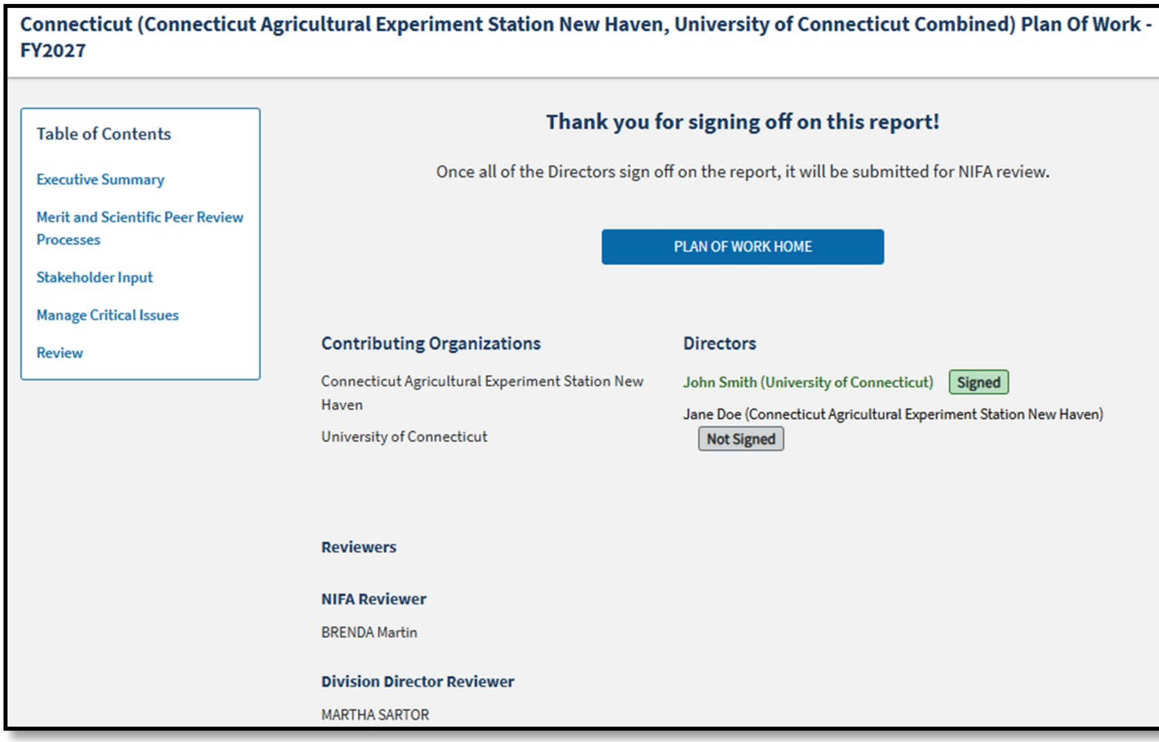


7. Once there are no errors, you can Submit for Organizational Review.

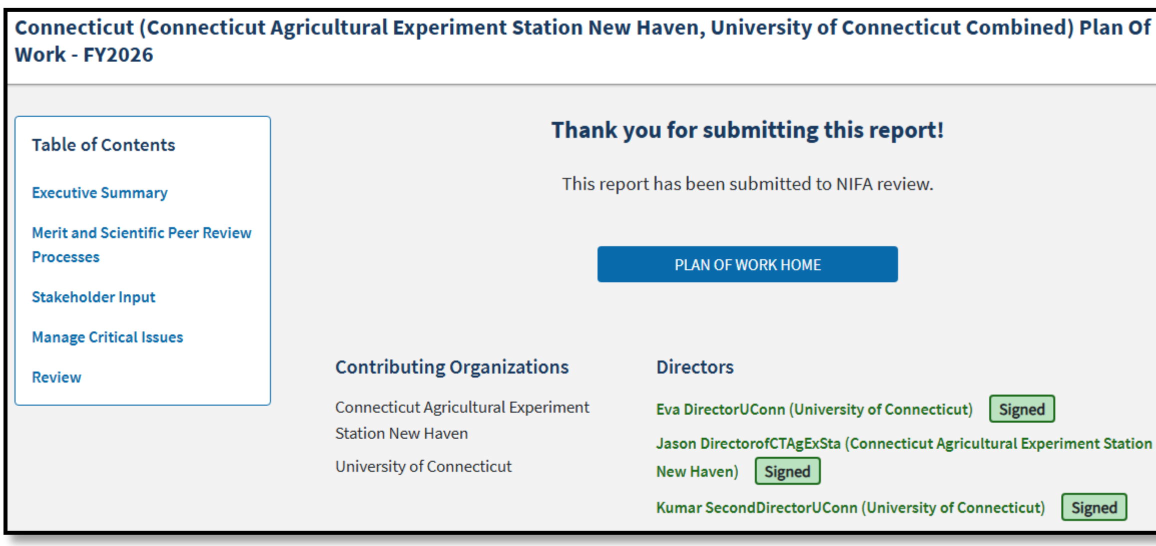


8. While in Organizational Review status, the Plan of Work will be reviewed by all users for the institution with the Director role. As each Director completes their review, they will each Sign Report.

9. If there is more than one Director and not all Directors have signed the report, the POW will remain in Organizational Review status.

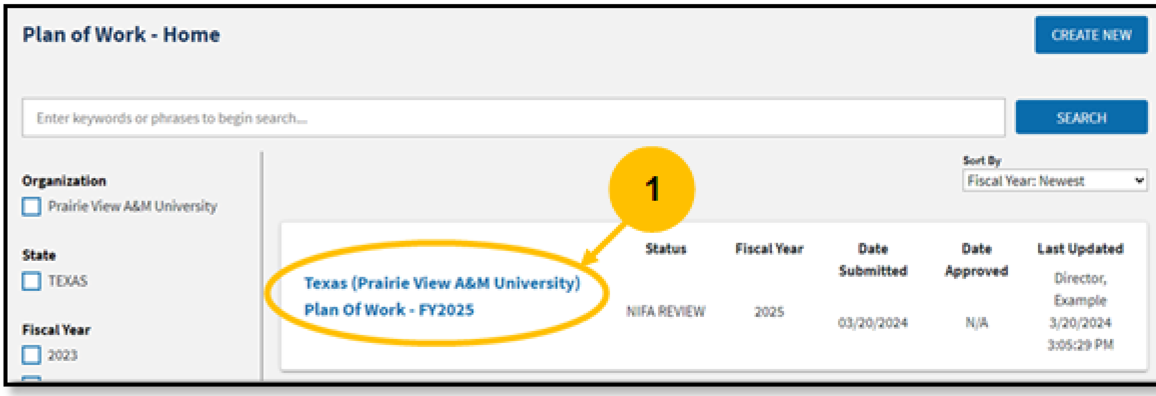


10. When the final signature is added by the last Director, the POW will automatically be submitted to NIFA Review.



Retracting a POW in NIFA Review Status

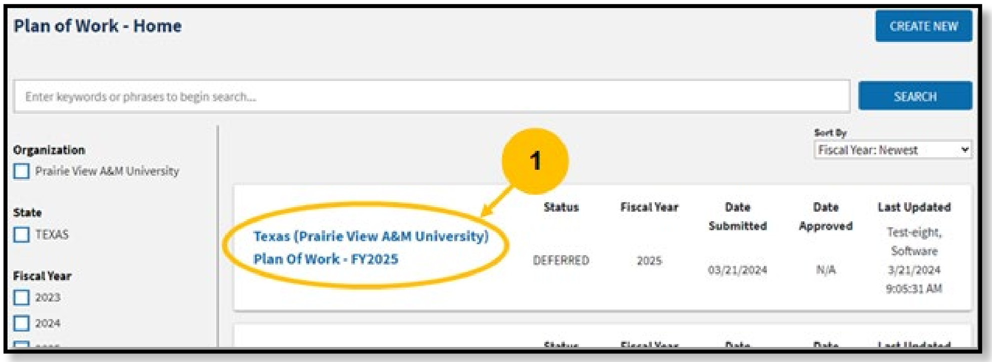
1. The POW will be shown as being in NIFA Review and clicking on the title will open the Review Report screen.



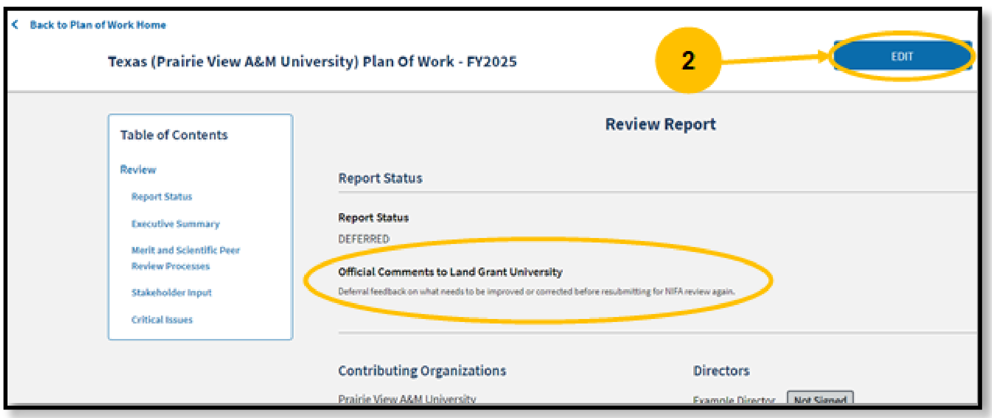
2. The only action available for a POW in NIFA Review status is to Retract it for further editing. Please note that if the POW is retracted, the status will be set to Draft and it will need to be submitted for Organizational Review with all Directors signing off on it before it can be submitted for NIFA Review again.

Editing a Deferred Plan of Work

1. When a Plan of Work is returned for further edits, the report will be in Deferred status. Click on the POW title to view the official comments from the NIFA Reviewer and access the report for editing.



2. The official comments from the NIFA reviewer will be shown in the Report Status section at the top. **Save a copy of those comments prior to editing.** Clicking the Edit button will return the POW to Draft status and allow for editing and re-signing for resubmission to NIFA review.



3. Click on the Continue button or click on one of the headings in the Table of Contents to enter or edit information. Then submit to Organizational Review and then signature by Directors to resubmit for NIFA Review.

PLAN OF WORK COMPONENTS

The components are listed in order of appearance when filling out the POW form. During review and for the final POW, the order changes to move the Executive Summary to the beginning.

- Merit and Scientific Peer Review Processes
  - Describe the merit and scientific peer review processes that will be established/utilized/improved at your institution in order to guide resource allocation and programming decisions. Use "No significant changes" if there are no updates from the previous POW.
- Stakeholder Input
  - Actions to seek stakeholder input that encourage their participation – What action(s) will you take to seek stakeholder input that encourages stakeholder participation? Provide a brief paragraph, lists also acceptable. Use "No significant changes" if there are no updates from the previous POW.
  - Methods to identify individuals and groups – What method(s) will you use to identify groups and individuals from whom to collect input? Provide a brief paragraph, lists are also acceptable. Use "No significant changes" if there are no updates from the previous POW.
  - Methods for collecting stakeholder input – What method(s) will you use to collect input from the stakeholders? Provide a brief paragraph, lists are also acceptable. Use "No significant changes" if there are no updates from the previous POW.
  - A statement of how the input will be considered – How will collected input be considered in program planning? Provide a brief paragraph, lists are also acceptable. Use "No significant changes" if there are no updates from the previous POW.
- Critical Issues
  - Describe the short-, intermediate-, and long-term critical agricultural issues in the state and the current and planned research projects and Extension programs targeted to address the issues.
  - Tie to any of nine Science Emphasis areas linked to NIFA's science priorities and objectives.
  - Each research project or Extension program planned to support the issue should have the appropriate primary Critical Issue selected for the accession. Once approved by NIFA, Critical Issues become available for selection during project and program initiation and may be updated later by editing the accession.
  - All institutions within a state share the same Critical Issues
    - In a few states, institutions report POW separately, but they do not have to report projects/programs against every critical issue if not applicable
- Executive Summary
  - Provide a summary of program planning at your institution in the Overview.
  - Provide additional information for each Critical Issue. (optional)

PLAN OF WORK FIELDS

The accompanying tables display the fields, entry type, and character limits in the Plan of Work. The fields are listed in order of appearance when filling out the POW form. During review and for the final POW, the order changes to move the Executive Summary to the beginning.

Plan of Work Field	Required	Entry Type and Character Limits
Merit and Scientific Peer Review Process: Process	Yes	10,000 characters
Stakeholder Input: Actions to seek stakeholder input that encourage their participation	Yes	10,000 characters
Stakeholder Input: Methods to identify individuals and groups	Yes	10,000 characters
Stakeholder Input: Methods for collecting stakeholder input	Yes	10,000 characters
Stakeholder Input: A statement of how the input will be considered	Yes	10,000 characters
Manage Critical Issues: Title	Yes	175 characters
Manage Critical Issues: Description	Yes	4,000 characters
Manage Critical Issues: Science Emphasis Area	Yes	Checkbox to select one or more
Manage Critical Issues: Length of Issue	Yes	Radio button selection (Short Term, Intermediate, Long Term)
Executive Summary: Overview	Yes	8,000 characters
Executive Summary: Critical Issue Additional Information	Yes	8,000 characters per issue

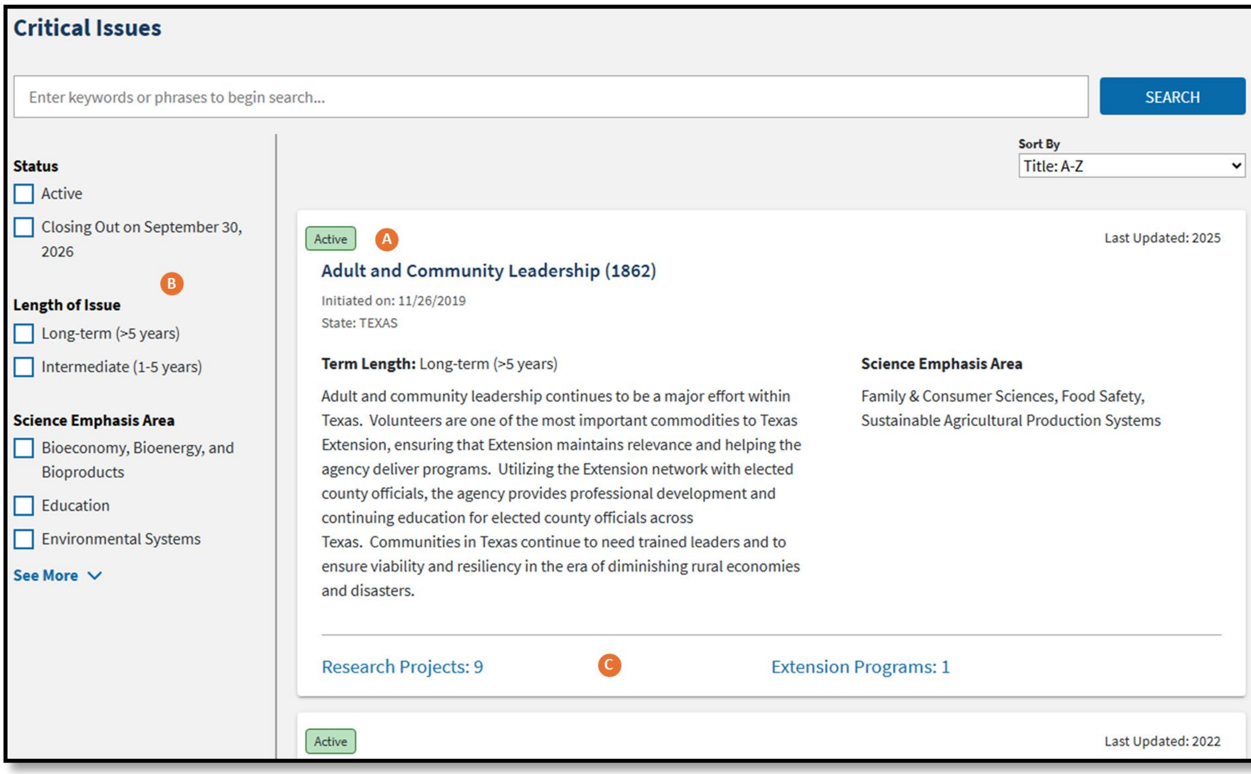
PLAN OF WORK STATUSES

<table>
<tr><th>Status</th><th>Description</th></tr>
<tr><td>Draft</td><td>Plan of Work has been started and saved but not yet submitted.</td></tr>
<tr><td>Organizational Review</td><td>Plan of Work has been submitted for review by one or more Directors.
Directors and State Contributors can directly edit and re-open it for further revisions (requires all to re-sign).
Directors can return the Plan of Work to draft for revisions (requires all to re-sign).
Directors can sign the Plan of Work. Once all Directors have signed the Plan of Work, it is submitted for NIFA Review.</td></tr>
<tr><td>NIFA Review</td><td>Plan of Work has been signed off by all listed Director(s) and is ready for review by NIFA. The following actions may be taken by NIFA reviewers before submitting for Division Director review:
Recommend approval with official comments from the reviewer
Recommend deferral with official comments detailing feedback for edits
Additionally, State Contributors and Directors can retract the Plan of Work from NIFA Review and make changes. The Plan of Work can then be resubmitted for NIFA Review.</td></tr>
<tr><td>Division Director Review</td><td>A NIFA Division Director performs a secondary review to finalize the official comments and formalize the decision. It may be sent back to the NIFA reviewer for revision of the official reviewer comments if deemed necessary before proceeding to Approved or Deferred status.</td></tr>
<tr><td>Approved</td><td>The Plan of Work has been approved and is now active. If there is an issue and the report needs to be edited, contact the NRS Help Desk (nrs@usda.gov) for assistance.</td></tr>
<tr><td>Deferred</td><td>Plan of Work has been deferred, and official comment is provided by NIFA on requested revisions and/or additions. Edits should be made, and the POW should be resubmitted for NIFA review.</td></tr>
</table>

CRITICAL ISSUES (AREERA ONLY)

Critical Issues (CI) are used by institutions with AREERA funding to describe agricultural problems in their state for the purpose of categorizing the work of capacity research projects and Extension programs making an impact on those issues.

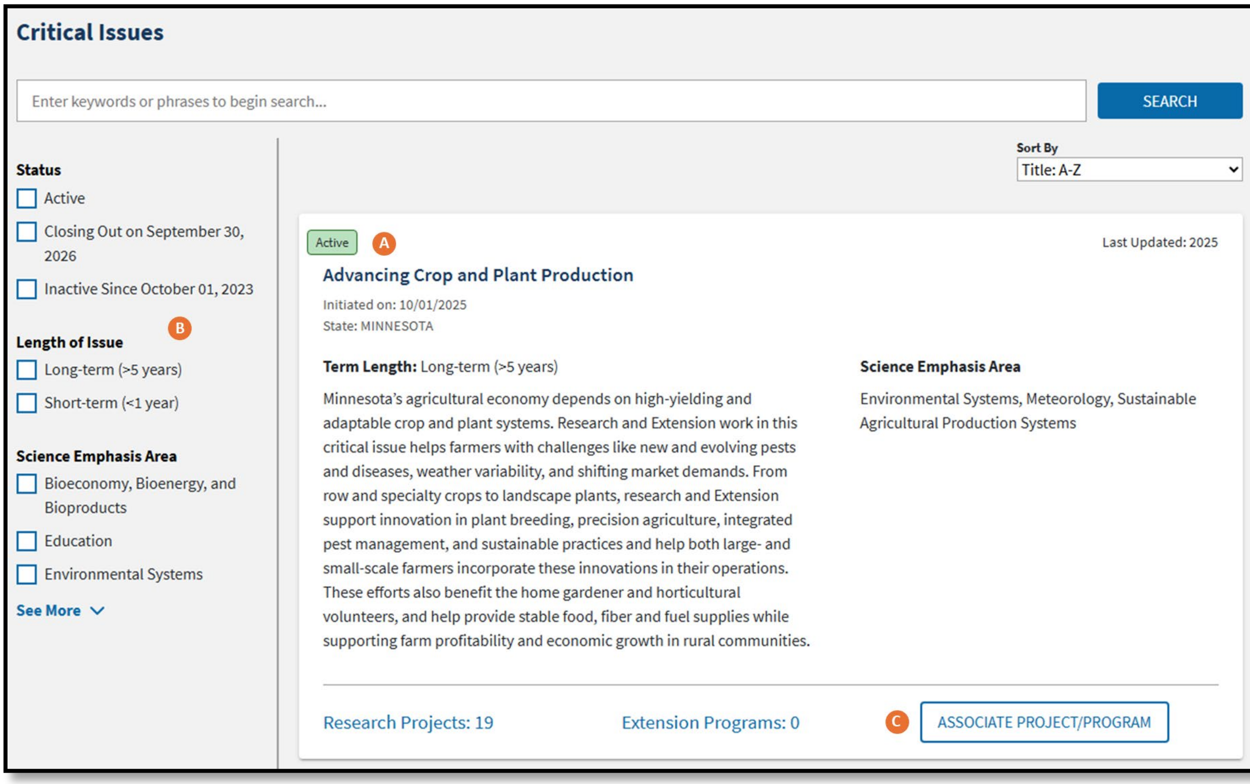
Managing the CI themselves can only occur during the Plan of Work process flow, but the CI module allows users to view their state's current and past CI along with the associated research projects and Extension programs.



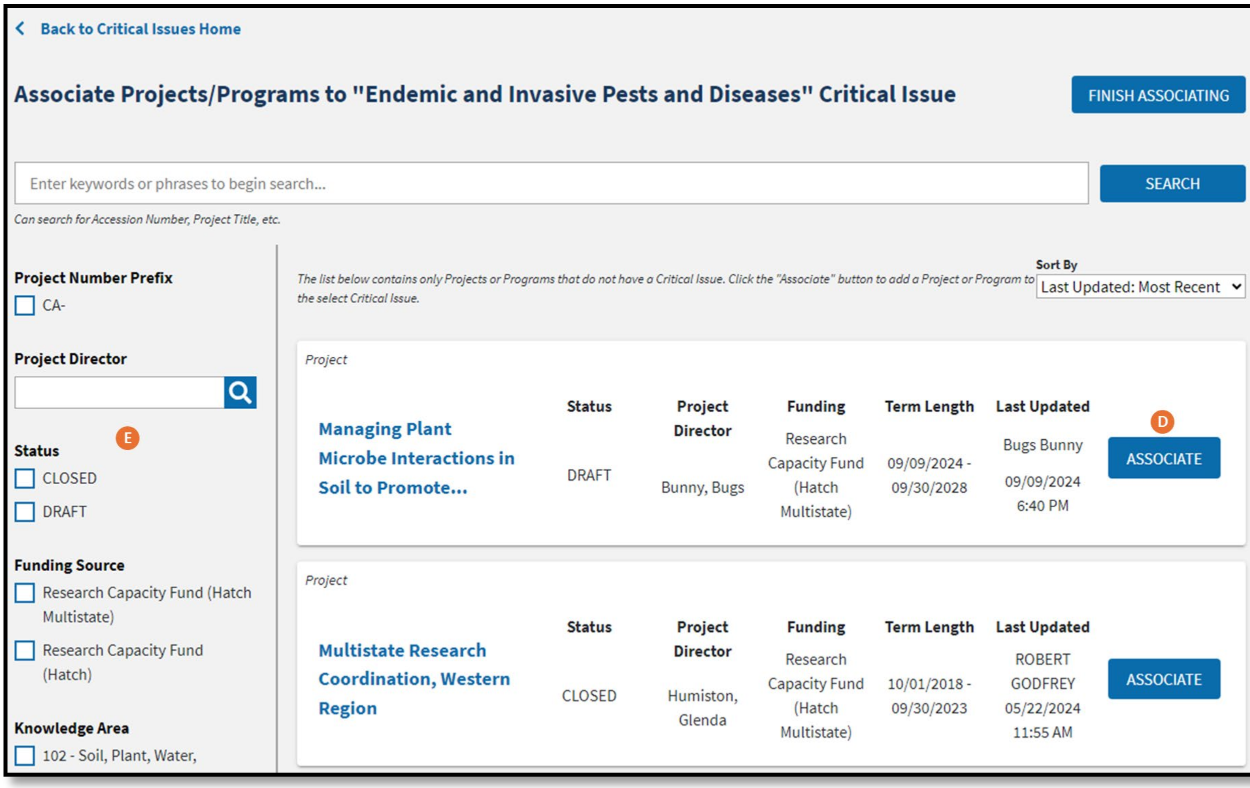
A) Dashboard of Critical Issues for your state/territory including the current status
B) Search, filter, and sort options are available to find specific Critical Issues
C) The Associated Projects/ Programs are displayed on the bottom of the Critical Issue tile and clicking on the respective links allows you to see a detailed list of the Projects/Programs

ASSOCIATE PROJECT/PROGRAM (DIRECTOR AND STATE CONTRIBUTOR ONLY)

Within the module, Director and State Contributor user roles are able to associate accessions with specific CI.



- **A)** Dashboard of Critical Issues for your state/territory including the current status
- **B)** Search, filter, and sort options are available to find specific Critical Issues
- **C)** The Associated Projects/Programs are displayed on the bottom of the Critical Issue tile and clicking on the respective links allows you to see a detailed list of the Projects/Programs. State Contributors and Directors can associate unassociated Projects and Programs by clicking the Associate Project/Program button displayed on the bottom of the Critical Issue card.



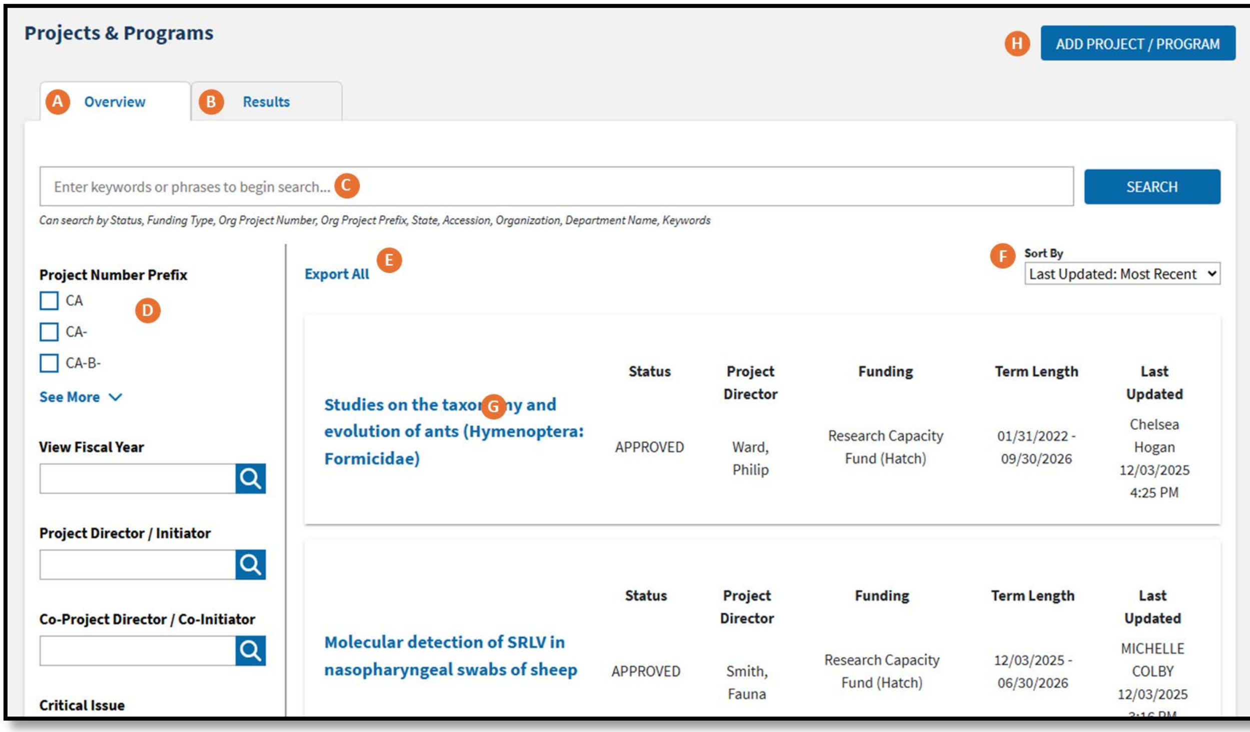
D) Associate projects or programs without a Critical Issue by clicking the “Associate” button on the right-side of the Project/Program description. Then select “Finish Associating”.

E) Search, filter, and sort options are available to find specific Projects/Programs without Critical Issues

PROJECTS & PROGRAMS MODULE

Research Projects and Extension Programs are entered into NRS to track how institutions are using capacity funds through financial and non-financial reporting.

PROJECTS & PROGRAMS OVERVIEW TAB



A) The Projects & Programs Overview tab displays all projects and programs for the organization

B) The Results tab displays information related to Results for projects and programs and is covered in the next section on Reporting Results.

C) Use the search bar to find a specific project or program including lookup by accession number

D) Use filters to view accessions in specific categories including status and funding type

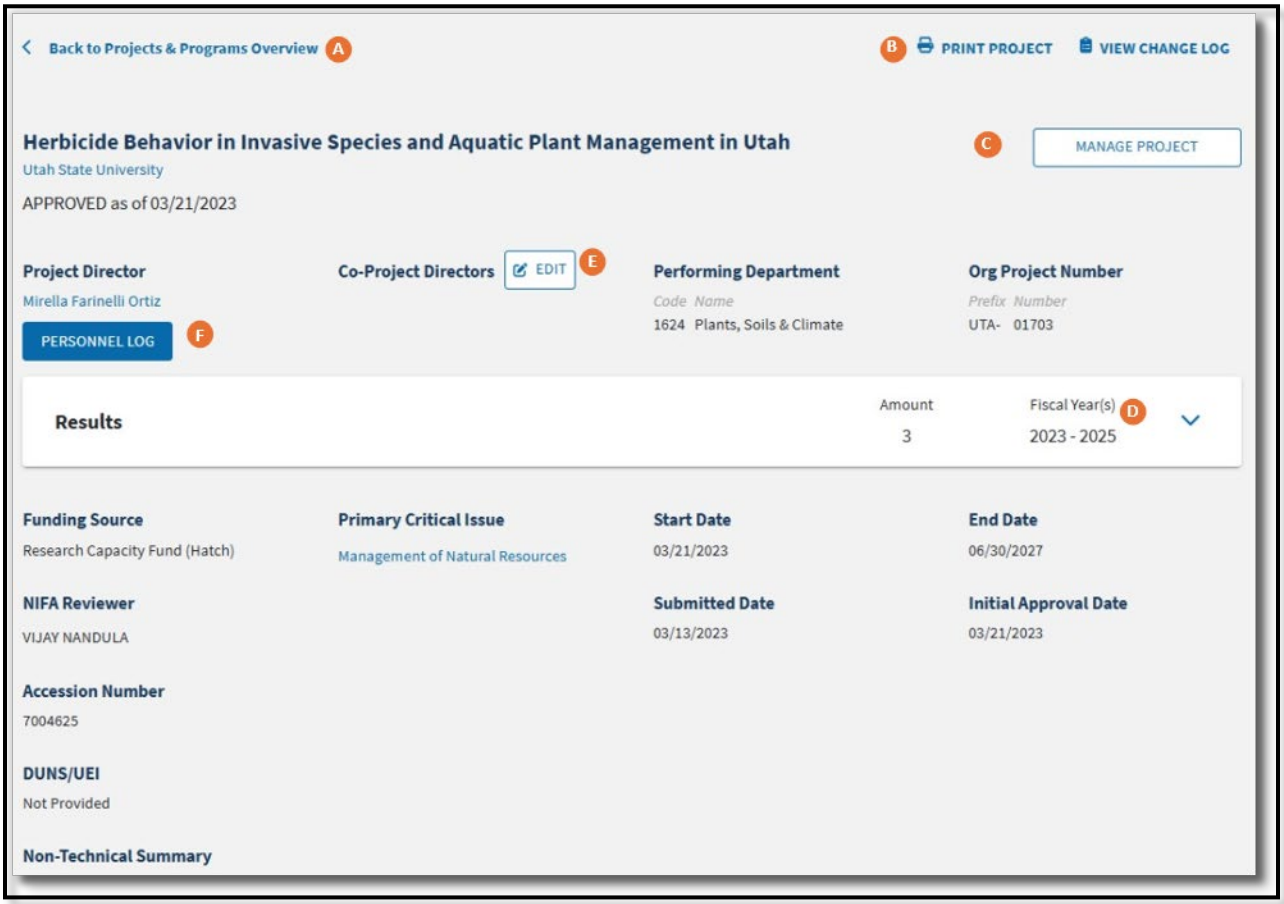
E) Export a spreadsheet of all projects and programs shown with the current on-screen filters/search

F) Sort by various categories including most recent update date, approval status, and start/end date

G) Click the title on the project or program card to view its full details

H) Click the button to add a new project or program (not available to View Only users)

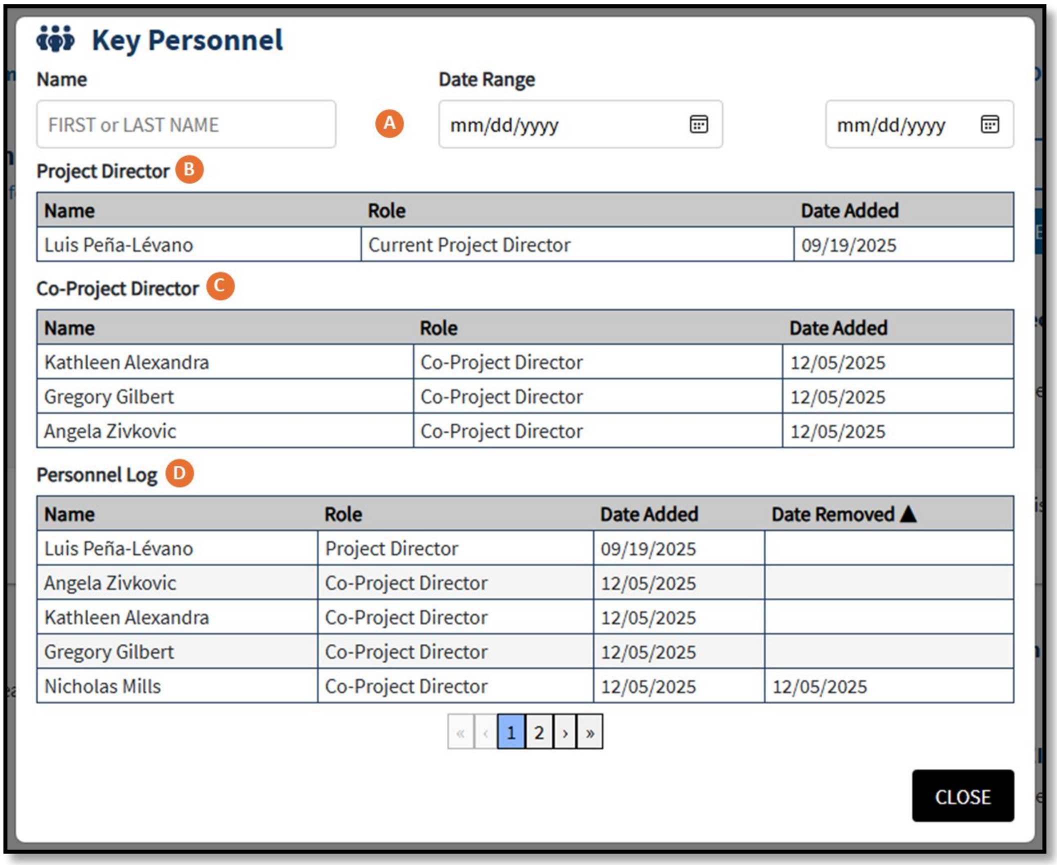
Project & Program Detail View



The detailed view of an accession has the specific information that describes the research project or Extension program with some standard navigation elements:

- **A)** Click "Back to Projects & Programs Overview" to return to the Projects & Programs Overview tab
- **B)** Other options, depending on the user's access and status of the accession, will be located here and include Print Project, View Change Log and View Comments.
  - The change log is grouped by date and organized by timestamp with the most recent changes appearing first
  - The change log shows the edits made and the user who made them
- **C)** Click the button to manage a project and edit the details, if user has access
- **D)** View and add Results for a project or program
- **E)** Add, change permissions, or remove Co-Project Directors/Co-Initiators
- **F)** View a history of personnel changes for the accession, including Project Director/Initiator and any Co-Project Directors/Co-Initiators

Personnel Log



The Personnel Log has the history of personnel changes for the accession.

- **A)** Filtering options include searching by name and date range of the personnel management action
- **B)** Current Project Director or Initiator
- **C)** Current Co-Project Directors or Co-Initiators
- **D)** Click the button to manage a project and edit the details, if users has access

Capacity Funding Sources & Accession Type

Research projects and Extension programs have different data fields. The capacity funding source directs what type of accession is created in NRS.

Research Projects	Extension Programs
▪ Animal Health and Disease Research (AHDR) ▪ McIntire-Stennis ▪ Research Capacity Fund (Evans-Allen) ▪ Research Capacity Fund (Hatch Multistate) ▪ Research Capacity Fund (Hatch)	▪ Extension Capacity Fund (1890) ▪ Extension Capacity Fund (Smith-Lever 3(b) and 3(c)) ▪ Renewable Resources Extension Act (RREA)

Access to funding sources at the organizational level is set by NIFA based on eligibility. Within an organization, the Org Administrator assigns access to funding sources through individual user profiles. Users who are assigned to a specific funding type can select that funding type when creating a project or program and will appear in the Project Director/Initiator selection drop-down for accessions associated with that funding type.

Org Administrators automatically have access to all funding types for the organization when creating projects or programs. However, to appear in the Project Director/Initiator drop-down menu, an Org Administrator must also have the applicable funding type selected in their user profile.

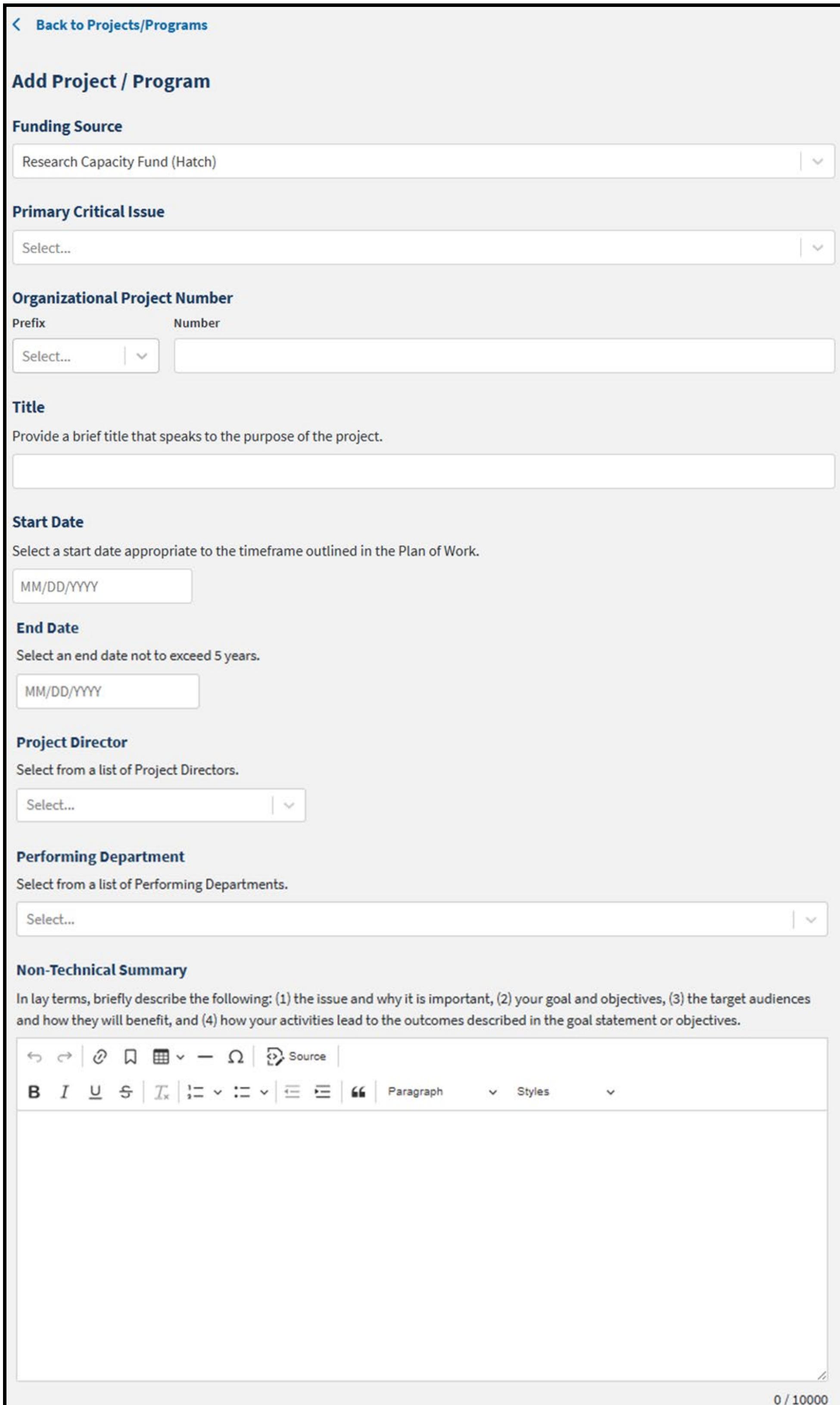
ADD PROJECT/PROGRAM

Once Add Project/Program is selected, you will be prompted to choose a Funding Source. The dropdown menu is automatically populated with funding sources listed for the user in their profile.

The fillable fields will populate on the research project or Extension program form depending on which Funding Source is selected. Once the Project/Program has been saved, the Funding Source cannot be changed. If the wrong Funding Source is selected and saved, the accession may be removed through the Manage Project menu if the accession has not been approved by NIFA.

Add Research Project

Note: For Hatch Multistate Research Projects, there will also be fields related to the NIMSS information including selection of project in NIMSS and applicable Objectives.


Back to Projects/Programs

Add Project / Program

Funding Source

Research Capacity Fund (Hatch)

Primary Critical Issue

Select...

Organizational Project Number

Prefix

Select...

Number

Title

Provide a brief title that speaks to the purpose of the project.

Start Date

Select a start date appropriate to the timeframe outlined in the Plan of Work.

MM/DD/YYYY

End Date

Select an end date not to exceed 5 years.

MM/DD/YYYY

Project Director

Select from a list of Project Directors.

Select...

Performing Department

Select from a list of Performing Departments.

Select...

Non-Technical Summary

In lay terms, briefly describe the following: (1) the issue and why it is important, (2) your goal and objectives, (3) the target audiences and how they will benefit, and (4) how your activities lead to the outcomes described in the goal statement or objectives.

Source

Paragraph

Styles

0 / 10000

Methodology

Describe the ways in which the project will be conducted, with emphasis on the general scientific methods and any unique aspects or significant departures from usual methods.

Source

Paragraph Styles

0 / 10000

Integrated Activities

Is this an integrated research and extension activity (AREERA Section 104, 105, and 204)?

◯ Yes ◯ No

Research Effort Categories

a. Basic	0	%
b. Applied	0	%
c. Developmental	0	%

Must total 100%

Animal Health Percentage

Enter the percentage of animal health research for this project or "0" for none.

0 %

Multistate Activities

Is this a multistate activity (AREERA Section 104 and 201)?

◯ Yes ◯ No

Classifications

Knowledge Area	Subject of Investigation	Field of Science	Percent
Select...	Select...	Select...	0 %

Must total 100%

Add Classification Row

Assurances

Are Human Subjects Involved?

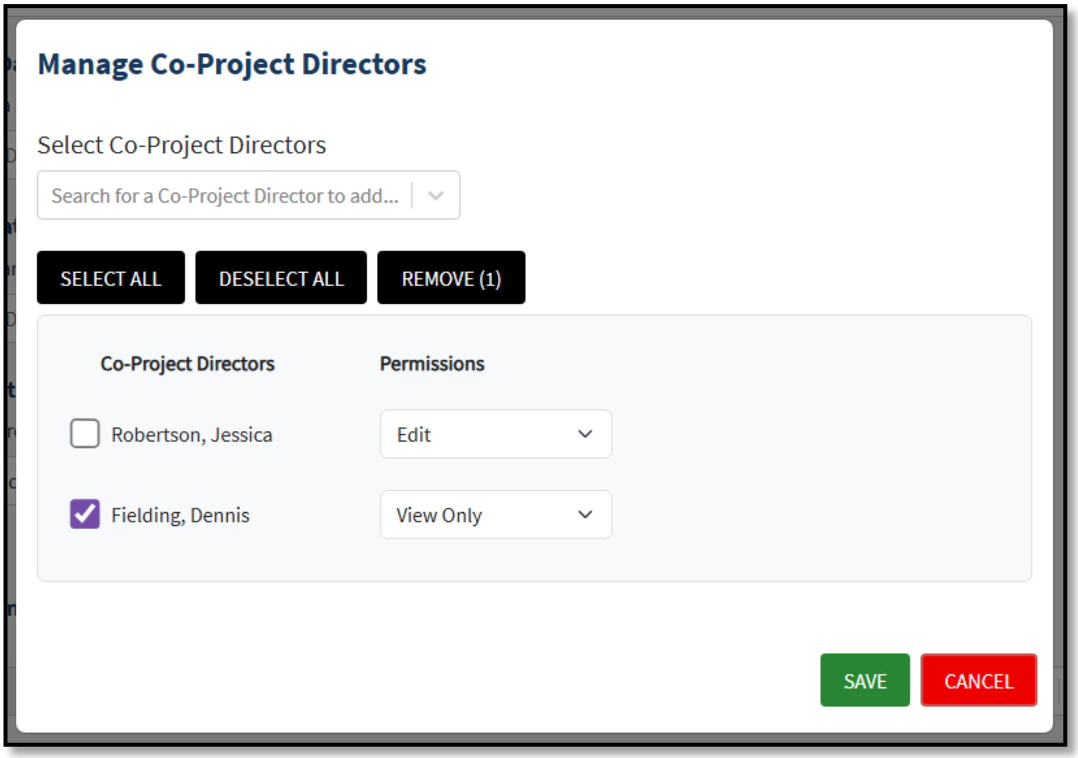
◯ Yes ◯ No

Are Vertebrate Animals Used?

◯ Yes ◯ No

CANCEL SAVE AND CONTINUE

Manage Co-Project Directors



After you confirm and add a Project Director, this field is available on the editing screen through the Manage Co-Project Directors button that appears. Using the button Select any Co-PDs for the project. The default access for Co-PDs is Edit for the accession but there is the option to individually give Co-PD(s) View Only permissions for the accession. The Save button must be used to save changes. Saved changes will be recorded in the Personnel Log which may be viewed when viewing the accession by clicking on the appropriate button.

This screen is also available through the Edit button after the Co-Project Directors header on the detail accession view. Co-Project Directors are not required for projects.

Research Project Fields

The table below displays the fields, rules, character limits, and approximate word counts for the Research Project form. You will receive error messages for each field when the criteria are not met.

Research Project Field	Required	Entry Type, Character Limits, and Notes	Approximate Word Count
NIMSS Project Information	Yes (Hatch Multistate only)	Dropdown	N/A

Research	Required	Entry Type, Character Limits, and Notes	Approximate Word Count
Primary Critical Issue[1]	Yes (AREERA only)	Dropdown	N/A
Org Project Number	No	Dropdown for prefix, 20 characters for number; Applies only to Research Projects. This optional set of fields allows institutions to have internal tracking numbers.	N/A
Title[1]	Yes	175 characters; Provide a brief title that speaks to the purpose of the project. You do not need to put the title in quote marks. Please do not begin your title with spaces.	26
Start Date	Yes	Calendar widget, format mm/dd/yyyy; New projects can be future dated to match the start of the new fiscal year or the point at which activities will begin. When a Research Project receives initial approval after NIFA review, the start date will be set as either the initial approval date or requested start date, whichever date is later being automatically selected by the system. The start date cannot be edited after a project has been approved.	N/A
End Date	Yes	Calendar widget, format mm/dd/yyyy; Select an end date on which you plan to stop conducting research on this project. The duration of the project may not exceed 5 years. Projects of shorter duration may be extended without approval but may not exceed a total of 5 years from the original start date.	N/A
Project Director[1]	Yes	Dropdown populated with users from the organization with funding type access. If you change Project Directors, a confirmation screen will pop up.	N/A
Co-Project Director	No	This field is available on the editing screen through the Manage Co-Project Directors button that appears once a Project Director is selected. Select any Co-PDs for the project from the dropdown which is populated form the organization users with access to the funding type. The default access is view only for the accession but there is the option to individually give Co-PD(s) edit permissions for the accession.	N/A
Performing Department	No	Dropdown. Contact the NRS Help Desk if you need revisions to your organization's Performing Department list.	N/A
Non-Technical Summary[1]	Yes	8,000 characters; In lay terms, briefly describe the following: (1) the issue and why it is important, (2) your goal and objectives, (3) the target audiences and how they will benefit, and (4) how your	1,304

[1] *Requires NIFA reapproval if changed*

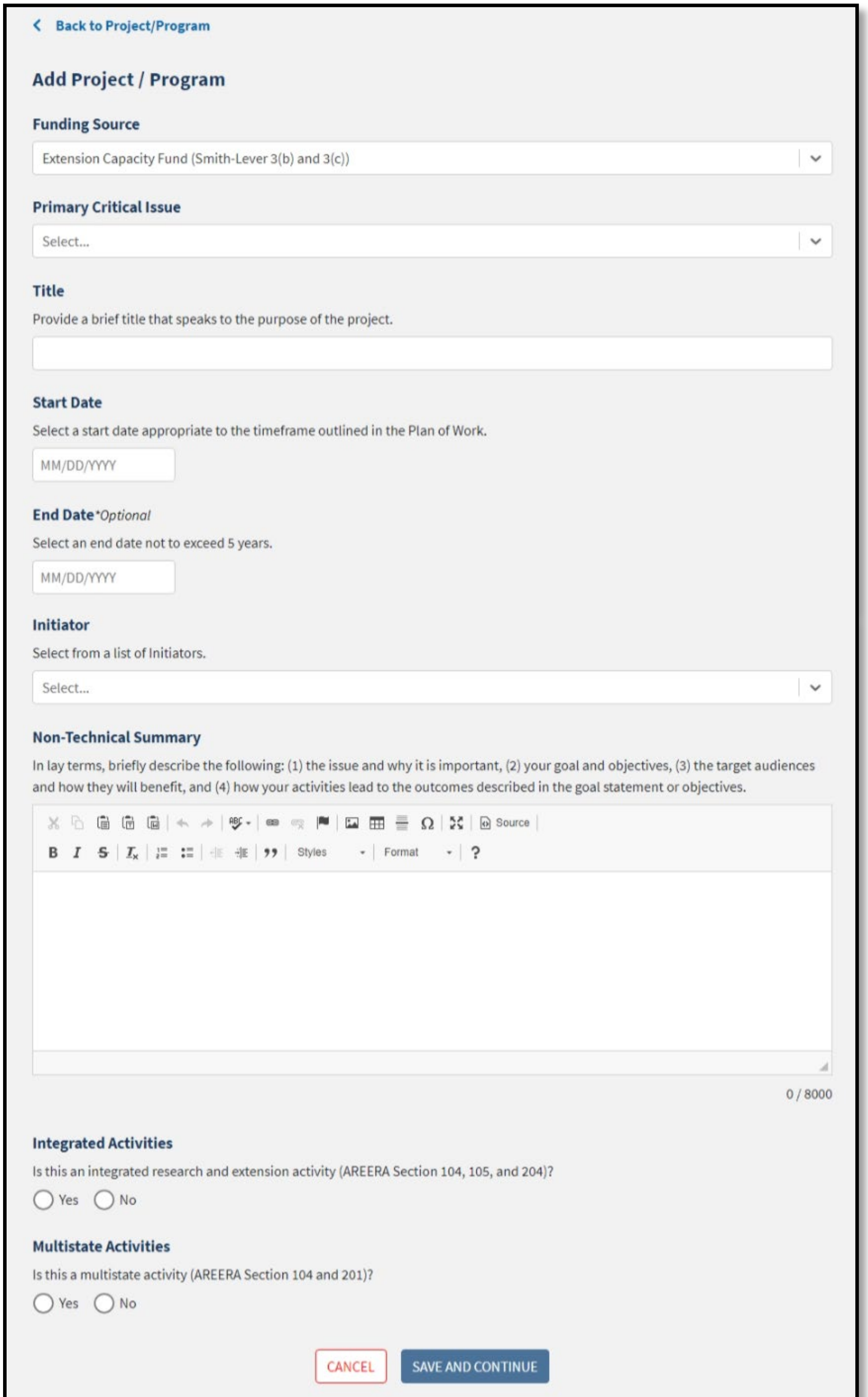
Research Project Field	Required	Entry Type, Character Limits, and Notes	Approximate Word Count
		activities lead to the proposed outcomes described in the goal statement or objectives.	
Objectives	Yes (Hatch Multistate only)	Checkbox(es); Use the checkbox(es) to select the NIMSS objectives applicable to your project.	N/A
Methodology[2]	Yes	8,000 characters; Describe the ways in which the project will be conducted, with emphasis on the general scientific methods and any unique aspects or significant departures from usual methods.	1,304
Integrated Activities	Yes, if present (AREERA only)	Radio button and text box if yes; Integrated activities are jointly planned, funded, and interwoven activities between research and Extension to solve problems. Such activities include the generation of knowledge and the transfer of information and technology. Examples of integrated activities include joint research and Extension personnel appointments. In addition, integrated activities may include coordinating committees, workshops, training, centers, projects, and meetings, as long as they meet the definition of *integrated activities*.	N/A
Research Effort Categories	Yes	3 percentage fields: Basic, Applied, Developmental (must total to 100%) • **Basic research** is also known as fundamental research; it supports (i) research that increases knowledge or understanding of the fundamental aspects of phenomena and has the potential for broad application; and (ii) research that has an effect on agriculture, food, nutrition, or the environment. • **Applied research** is research that includes expansion of the findings of basic (fundamental) research to uncover practical ways in which new knowledge can be advanced to benefit individuals and society. Applied research is directed primarily towards a specific practical aim or objective. • **Developmental research** is creative and systematic work, drawing on knowledge gained from research and practical experience, which is directed at producing new products or processes or improving existing products or processes. Like basic or applied research, experimental development research will result in gaining additional knowledge.	N/A
Animal Health Percentage	Yes	Textbox, use 0% for none; Applies only to non-ADHR Research Projects.	N/A

[2] *Requires NIFA reapproval if changed*

Research Project Field	Required	Entry Type, Character Limits, and Notes	Approximate Word Count
Multistate Activities	Yes, if present (AREERA only)	Radio button and text box if yes; Multistate activities are collaborative efforts that reflect the programs of institutions located in at least two or more states or territories. Multistate Extension activities might include committees, projects, training, workshops, centers, and meetings that involve more than one state or territory. Each participating state or territory must collaborate on objectives and be involved in the outcomes.	N/A
Classifications[3]	Yes	3 dropdowns: Knowledge Areas, Subject of Investigation, Field of Science (minimum 5%, must total to 100%); See Classification Manual. • **Knowledge Areas (KAs)** classify the scientific, Extension, or education topic and align with NIFA's 9 Science Emphasis Areas. • **The Subject of Investigation (SOI)** series provides an additional facet for classification. It is generally the object of the research or activity: the class of plant, animal, organism, material, process, procedure, etc., under investigation. • **The Field of Science (FOS)** classification consists of a modified version of the fields of science used by the National Science Foundation for various government-wide reports.	N/A
Assurances: Are Human subjects involved?[3]	Yes	Radio button then if yes, dropdown for exemption category number and calendar widget; See additional guidance in the next section. **STATEMENT OF POLICY** - Institutions receiving NIFA funding for research are responsible for protecting human subjects and providing humane treatment of animals. To provide for the adequate discharge of this responsibility, NIFA policy requires an assurance by the institution's Authorized Representative (AR or AOR) that appropriate committees in each institution have carried out the initial review of protocols and will conduct continuing reviews of supported projects.	N/A
Assurances: Are Vertebrate Animals Used?[3]	Yes	Radio button then if yes, calendar widget; See additional guidance in the next section. Prior to commencing research activities with vertebrate animals, all protocols involving animals in NIFA-funded projects must be approved by the Institutional Animal Care and Use Committee (IACUC). More information can be found on the Domestic Assurance website.	N/A

[3] *Requires NIFA reapproval if changed*

Add Extension Program



< Back to Project/Program

Add Project / Program

Funding Source

Extension Capacity Fund (Smith-Lever 3(b) and 3(c))

Primary Critical Issue

Select...

Title

Provide a brief title that speaks to the purpose of the project.

Start Date

Select a start date appropriate to the timeframe outlined in the Plan of Work.

MM/DD/YYYY

End Date *Optional*

Select an end date not to exceed 5 years.

MM/DD/YYYY

Initiator

Select from a list of Initiators.

Select...

Non-Technical Summary

In lay terms, briefly describe the following: (1) the issue and why it is important, (2) your goal and objectives, (3) the target audiences and how they will benefit, and (4) how your activities lead to the outcomes described in the goal statement or objectives.

Source

Styles Format

0 / 8000

Integrated Activities

Is this an integrated research and extension activity (AREERA Section 104, 105, and 204)?

Yes No

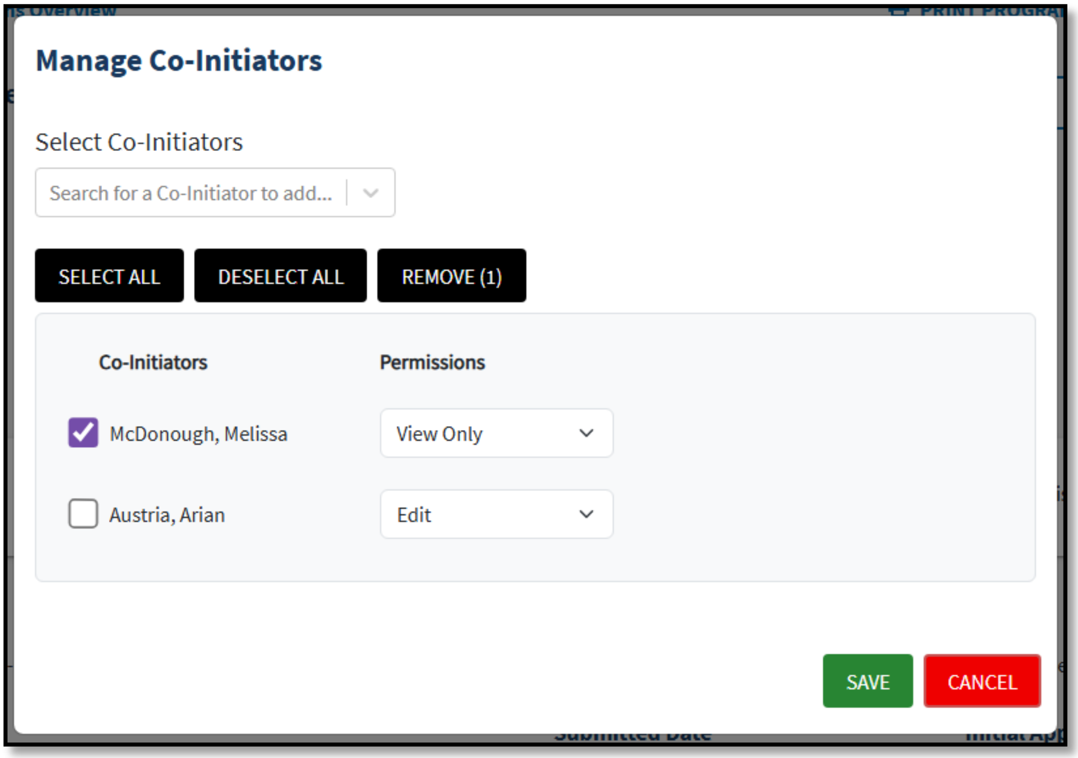
Multistate Activities

Is this a multistate activity (AREERA Section 104 and 201)?

Yes No

CANCEL SAVE AND CONTINUE

Manage Co-Initiators



After you confirm and add an Initiator, this field is available on the editing screen through the Manage Co-Initiators button that appears. Using the button Select any Co-Is for the project. The default access for Co-Is is Edit for the accession but there is the option to individually give Co-I(s) View Only permissions for the accession. The Save button must be used to save changes. Saved changes will be recorded in the Personnel Log which may be viewed when viewing the accession by clicking on the appropriate button.

This screen is also available through the Edit button after the Co-Initiators header on the detail accession view. Co-Initiators are not required for programs.

Extension Program Fields

Extension programs deliver science-based knowledge and informal education to people, enabling them to make practical decisions. Audiences may include agricultural producers, small business owners, consumers, families, young people, and other residents of rural communities and urban areas. Extension emphasizes taking knowledge gained through research and education and bringing it directly to the people to create positive changes.

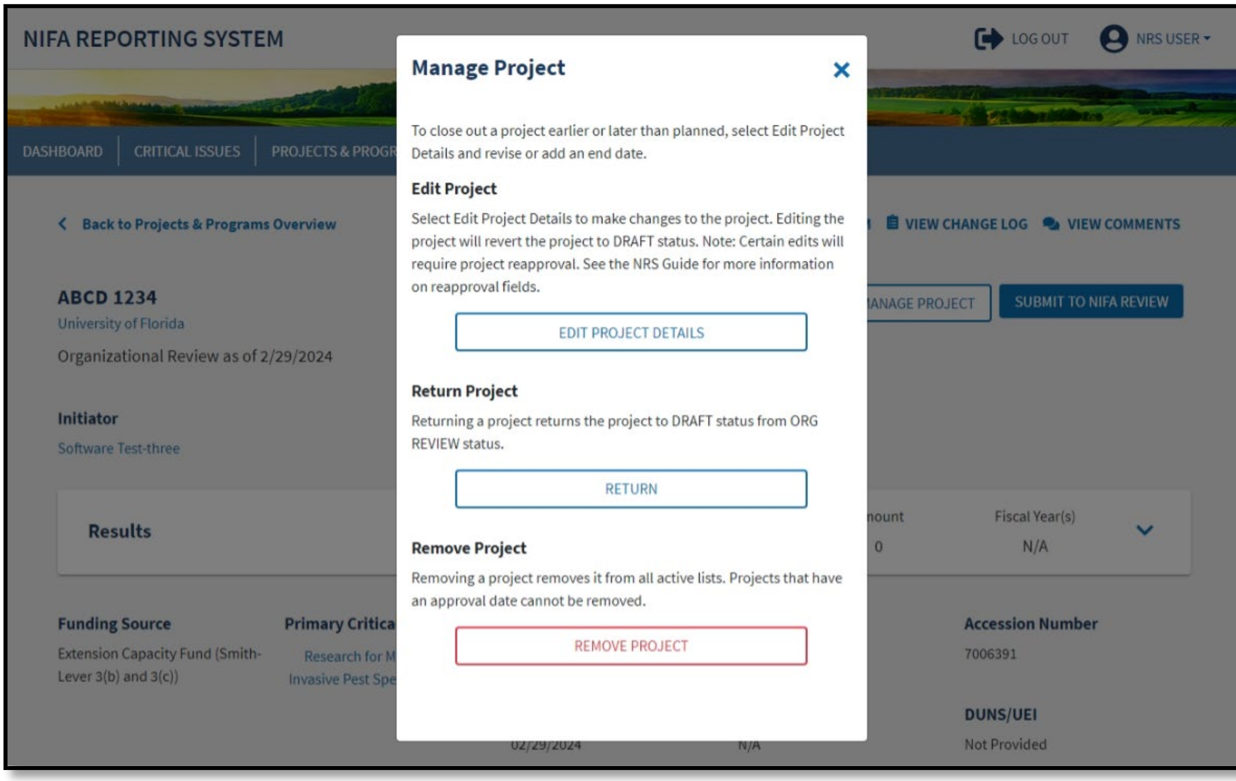
The table below displays the fields, rules, character limits, and approximate word counts for the Extension Program form. You will receive error messages for each field when the criteria are not met.

Extension Program Field	Required	Entry Type, Character Limits, and Notes	Approximate Word Count
Primary Critical Issue[4]	Yes (AREERA only)	Dropdown	N/A
Title[4]	Yes	175 characters; Provide a brief title that speaks to the purpose of the project. You do not need to put the title in quote marks. Please do not begin your title with spaces.	26
Start Date	Yes	Calendar widget, format mm/dd/yyyy; New programs can be future dated to match the start of the new fiscal year or the point at which activities will begin. The start date of an Extension Program is selected by the institution and accepted by the system. The start date cannot be changed after a program has been approved.	N/A
End Date	No	Calendar widget, format mm/dd/yyyy; Optional. Select an end date if you would like to close the Extension program. There are no specific limits for Extension program periods.	N/A
Initiator[4]	Yes	Dropdown populated with users from the organization with funding type access.	N/A
Co-Initiator	No	This field is available on the editing screen through the Manage Co-Project Directors button that appears once an Initiator is selected. Select any Co-Is for the program from the dropdown which is populated form the organization users with access to the funding type. The default access is view only for the accession but there is the option to individually give Co-PD(s) edit permissions for the accession.	N/A
Non-Technical Summary[4]	Yes	8,000 characters; In lay terms, briefly describe the following: (1) the issue and why it is important, (2) your goal and objectives, (3) the target audiences and how they will benefit, and (4) how your activities lead to the proposed outcomes described in the goal statement or objectives.	1,304

[4] *Requires NIFA reapproval if changed*

Extension Program Field	Required	Entry Type, Character Limits, and Notes	Approximate Word Count
Integrated Activities	Yes, if present (AREERA only)	Radio button and text box if yes; Integrated activities are jointly planned, funded, and interwoven activities between research and Extension to solve problems. Such activities include the generation of knowledge and the transfer of information and technology. Examples of integrated activities include joint research and Extension personnel appointments. In addition, integrated activities may include coordinating committees, workshops, training, centers, projects, and meetings, as long as they meet the definition of *integrated activities*.	N/A
Multistate Activities	Yes, if present (AREERA only)	Radio button and text box if yes; Multistate activities are collaborative efforts that reflect the programs of institutions located in at least two or more states or territories. Multistate Extension activities might include committees, projects, training, workshops, centers, and meetings that involve more than one state or territory. Each participating state or territory must collaborate on objectives and be involved in the outcomes. For additional information	N/A

Edit, Return, or Remove Project/Program



- Select the "Manage Project" button in the upper right of the Project/Program individual view
  - When the "Manage Project" button is selected, a modal will appear showing actions that can be taken on the project or program
  - Select "Edit Project Details" to make changes to the project/program data
  - Select "Return" (for accessions in Org Review status) or "Retract" (for accessions in NIFA Review status) to return the Project/Program to Draft status for further editing
  - Select "Remove Project" to remove a Project/Program
    - A project can only be removed if it has not been previously approved by NIFA (Approval Date will be N/A)
    - The following users can remove unapproved projects: Organizational Administrators, Directors, State Contributors, and the Project Director or Initiator assigned to the project or program
    - Projects/Programs with an approval date will need to complete closeout procedures, such as submitting Final Results and financial reporting, and cannot be removed
    - Projects or Programs in NIFA Review must be retracted before they can be removed

PROJECTS AND PROGRAMS EXPORT

From the Projects and Programs Overview tab, an export with some Project & Program data fields is available via the Export All button. Please note that if you are using filters or search terms, the export will only include the filtered Projects/Programs. Not all the fields will be used by all accessions since research projects and Extension programs may have different fields for initiations. The export fields include:

- Title
- Organization
- Accession #: This is a unique number automatically assigned by the system when the project or program is first saved.
- Org Prefix: This is a prefix for tracking information used by your organization (optional)
- Org Number: This is an identifier for tracking information used by your organization (optional)
- Org Full ID: This is the full identifier assigned to the accession by your organization for tracking that combines the prefix and root (optional)
- Project Director/Initiator: Formatted as Lastname, Firstname
- Project Director/Initiator Email
- Co-Project Director/Co-Initiator: All Co-PDs/Co-Is formatted as Lastname, Firstname separated by semicolons (;) (optional)
- Performing Department: This is a list specifically associated with your organization (optional)
- Funding
- Critical Issue: Only applies to AREERA funding types
- Reviewer Name: The name of the NIFA Reviewer assigned to the project or program
- Reviewer Email: The email of the NIFA Reviewer assigned to the project or program
- NIMSS Project Code: Only used by Hatch Multistate research projects
- Knowledge Area: The primary Knowledge Area for the research project (either highest percentage or for tied percentages, the first entry) (blank for Extension programs)
- Field of Science: Field of Science selected for the primary Knowledge Area (blank for Extension programs)
- Subject of Investigation: Subject of Investigation selected for the primary Knowledge Area (blank for Extension programs)
- Animal Health Percentage: (blank for Extension programs)
- Multistate?: Only applies to AREERA funding types
- Integrated Activity?: Only applies to AREERA funding types
- IRB: (blank for Extension programs)
- IACUC: (blank for Extension programs)
- Approval Date: This is the date of initial approval from NIFA and does not change due to reapproval. If it is blank, the accession has not been approved by NIFA yet.
- Start FY: The Fiscal Year of the start date.
- End FY: The Fiscal Year of the end date.
- Start Date: This may be the requested start date if it is a research project that has not had initial approval. If the requested start date is earlier than the initial approval date, the start date will be

changed to be the approval date. Start dates for Extension programs are not impacted by initial approval actions.
- End Date: (optional for Extension programs)
- Last updated by: User who last edited or performed an action on the accession or the associated Results.
- Last updated: Date and time of the last edit or action for the accession or the associated Results.
- Status: May be Draft, Org Review, NIFA Review, Approved, Deferred, or Declined
- Project Link

ADDITIONAL GUIDANCE

General Tips

- Do not include notes for individuals or NIFA reviewers in the accession fields, please use the separate View Comments function instead when submitting items to NIFA review.
- NRS does not allow images to be added to the text.
- Please use paragraphs to make it easier for reviewers to read the information being presented.
- NIFA does not perform a scientific merit review, the concentration is on compliance with the funding legislation and requirements in USDA departmental memos or other applicable guidance.
    - Specific formulas are generally not needed.
    - Personnel biosketches or curriculum vitae are not needed.
- When pasting text from a PDF containing scanned images converted by optical character recognition, make sure to read through what is pasted. OCR may get some characters incorrect, impacting the ability of a NIFA reviewer to easily understand the information being conveyed.
- NIFA does plan to make accession and associated Results information publicly available in the NIFA Data Gateway in the future, similar to REEport competitive grant reporting. Please keep this mind when writing and editing information in NRS. The View Comments information will not be made public.

Hatch Multistates

NRS connects with NIMSS to receive some multistate data to allow users to select the multistate project from the dropdown menu and select the project-relevant objectives as listed in NIMSS. NRS will also get the basic NIMSS project information and Collaborating/Performing States list data (not editable in NRS).

In order for a multistate to show up on your dropdown list, the multistate entry must have been approved in NIMSS and it needs to have someone from your organization in the participants list.

All other information in the project initiation should reflect the actual project(s) that is to be conducted at your institution and/or in your state because this detailed information is not in the national, five-year project in NIMSS. Please include specific goals/objectives in the Non-Technical Summary or in the Methodology which describes the individual experiment/project and how it contributes to the larger Hatch multistate project. Details that explain the multistate collaboration are also very valuable.

Human Subjects (Institutional Review Board)

If human subjects are involved, an Institutional Review Board (IRB) approval or determination date must be provided. IRB approvals are valid for one year.

- If human subjects are involved at a later not yet developed stage of the project, please indicate “yes” on Assurance Statement, and provide an intended future date for IRB approval. In addition, edit the methodology to state the plans to develop that part of the project and get IRB approval at that later date. The Project Director should plan to update the NRS entry with the official IRB approval date once that approval is obtained.
- If the IRB review determined that IRB is either not required, the project is “minimal risk”, or is exempt, please indicate “yes” on Assurance Statement, and provide the date of the review determination. Then add information in the Methodology section to explain that IRB review determined the project is either exempt, considered “minimal risk”, or does not require review, along with details on how long this status lasts and add the name of the IRB (generally this is the institutional name) providing the determination.
- If you are making an edit to a previously approved project later in the project period when work with human subjects is no longer being done, please edit the Methodology section to detail that the human subjects work has been completed (include a date) and a current IRB approval is no longer required.

Vertebrate Animals (Institutional Animal Care and Use Committee)

If vertebrate animals are involved, an Institutional Animal Care and Use Committee (IACUC) approval date must be provided. While IACUC approvals are valid for three (3) years, there must be at least one (1) year remaining on the IACUC approval at the time the project initiation form is reviewed/approved by NIFA.

If you are making an edit to a previously approved project later in the project period when no additional vertebrate animal work is involved, please edit the Methodology section to detail that the work has been completed (include a date) and current IACUC approval is no longer required.

APPROVAL FLOW AND STATUSES FOR RESEARCH PROJECTS AND EXTENSION PROGRAMS

Research Projects and Extension Programs added in NRS undergo a multistep review process. The process flow is explained below through descriptions of the various possible statuses:

Status	Description
Draft	The project/program has been created but not yet submitted (or resubmitted if it has been edited after being Deferred or Approved). Saved projects/programs will display Draft status in NRS. The assigned Project Director/Initiator (PD/I) and other non-View Only user roles can edit the project/program.
Organizational Review	This is when the project/program has been submitted for Organizational Review, for internal review and approval, with the option to add a comment. At this stage, projects/programs can be Returned to the PD/I for further edits.
NIFA Review	Projects/programs are submitted by the organization to NIFA for review with the option to add a comment. NIFA assesses the project/program for compliance & relevance for the capacity funding source. Only Assistant Organizational Administrators, Directors, Organizational Administrators, and State Contributors are able to submit Projects/Programs for NIFA Review.
Approved	Approved as submitted. After the initial approval, the project/program is considered active, but it may be edited and submitted for reapproval if project/program details change. Some fields may not require reapproval review and in those cases submitting the accession for NIFA Review will automatically return it to Approved status.
Deferred	Deferred for corrections or additional information. The reason for deferral is provided by NIFA via the View Comments function in NRS. Users can edit the deferred project/program for corrections and resubmit for NIFA review.
Declined	Declined due to an uncorrectable lack of fit to the funding source. The reason for the decline is provided by NIFA via the View Comments function in NRS. Users can not edit declined accessions.

The start date for active accessions depends on the type of accession. NRS applies separate logic as follows during the initial approval process:

- Research projects must undergo a NIFA Review and approval prior to commencing activities. When initial approval occurs in NRS, the start date will be set as either the requested start date or the initial approval date, with whichever date is later being selected as the start date.
- Extension programs will undergo NIFA Review but can begin work once they are submitted to NIFA. The start date of an Extension program is selected by the institution and is not impacted by NIFA's initial approval date.

REPORTING RESULTS

WHAT ARE RESULTS?

Results summarize the issue or problem an individual project/program addresses, major activities, progress toward goals and benefits. Organizations receiving capacity funding are required to submit Results for each active and approved research project and Extension program as required by NIFA Capacity Terms and Conditions. Submitting at least one Result for projects and programs satisfies the reporting requirements noted in the terms and conditions, but NIFA maintains the right to review these Results and request updates.

Results should be completed for all projects and programs for each active year; however, it will not prevent the Annual Report from being submitted. All Annual and Final Results submitted to NIFA will appear in the Annual Report of Accomplishments for that reporting fiscal year. Results are located within the Projects and Programs Module, on the Results tab.

ANNUAL RESULTS

An Annual Result must be submitted each year for active research projects and Extension programs. NRS will allow multiple Annual Results per fiscal year, however organizations are only required to submit one per active accession.

FINAL RESULTS

Final Results are required to be submitted following the end of a research project or Extension program. It is not necessary to re-enter all information from prior year Results however Final Results should reflect the entire period of performance and summarize the results achieved over the course of the project/program. NRS will only allow one Final Result per accession.

Final Results should also include a summary of equipment purchased with any federal funds under the award and indicate subsequent use of such equipment within the Comments field. Identification of the equipment should include a brief description or name and if available, the manufacturer's serial number, model number, Federal stock number, national stock number, or other identification number. See the examples of equipment summaries below:

- Example #1: Autoclave Sterilizer (Tuttnauer 2340EP) was used to train students in lab work procedures and to support Animal Science lab work.
- Example #2: An infrared spectrophotometer (ThermoScientific Nicolet iS20 FTIR) was purchased for the identification of organic compounds.

ANNUAL AND FINAL RESULTS FIELDS

In NRS, research projects and Extension programs have identical Annual and Final Results fields. All Results fields allow maximum amount of 10,000 characters. The fields for Annual and Final Results are as follows:

1. In 2-3 sentences, briefly describe the issue or problem your project addresses
2. Briefly describe in non-technical terms how your major activities helped you achieve, or make significant progress toward, the goals and objectives described in your non-technical summary
3. Briefly describe how your target audience benefited from your project's activities
4. Briefly describe how the broader public benefitted from your project's activities
5. Comments (optional unless 'Nothing Significant to Report' is selected)

IMPACT STATEMENTS

An Impact Statement is a brief summary of the key changes and measurable differences that occurred as a result of the project or program. An Impact Statement highlights significant work performed, contains reportable, quantifiable data and should be written in lay terms. In NRS, the impact of your project or program is reported within Annual and Final Results. Impact Statements are optional. To report a specific Impact Statement to NIFA, use the Comments field within the Annual or Final Result and add an "Impact Statement" header above the text.

ENTERING RESULTS

Results can be managed from the Projects and Programs details, Results tab, and within the Annual Report, depending on the user role assigned in NRS. To streamline date entry, Results entered in NRS will replicate to every applicable module and will be integrated automatically with the Plan of Work and Annual Report of Accomplishments for organizations with applicable AREERA funding.

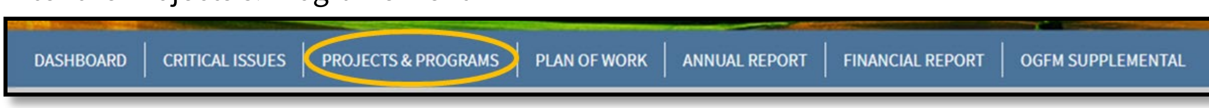
NRS will only allow Results to be added to projects and programs that have been approved by NIFA.

ADD RESULTS TO A PROJECT OR PROGRAM

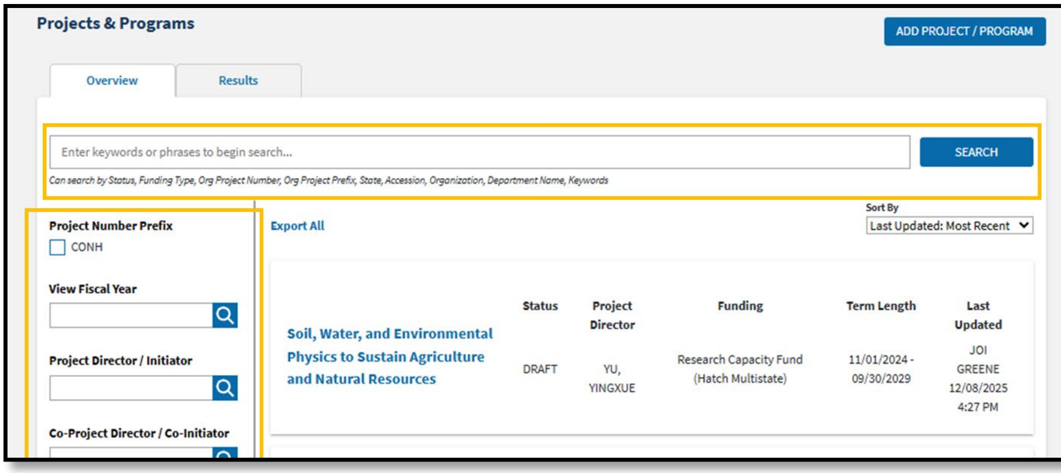
Adding Results to a Project or Program is accessible from three different locations in NRS: from the Projects & Programs module Overview tab, from the Projects & Programs module Results tab, and from the Closing Out Task List when viewing a project or program.

From the Projects & Programs Module Overview Tab

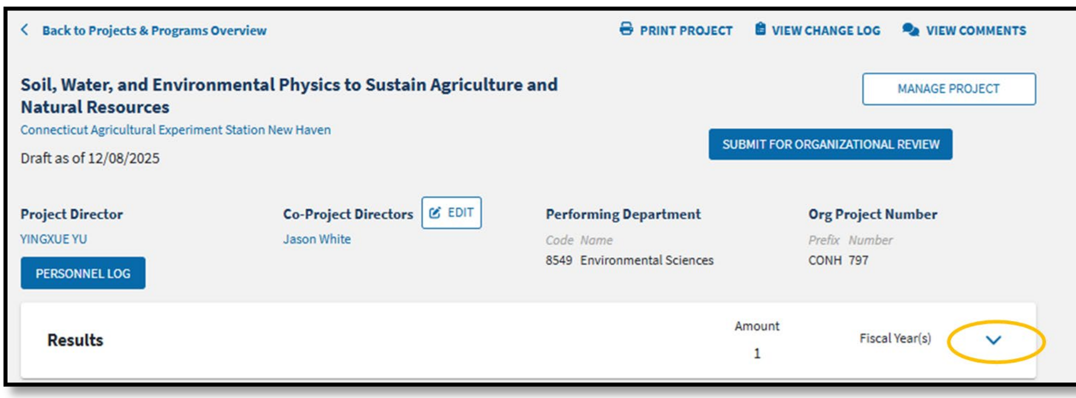
1. Enter the Projects & Programs Menu



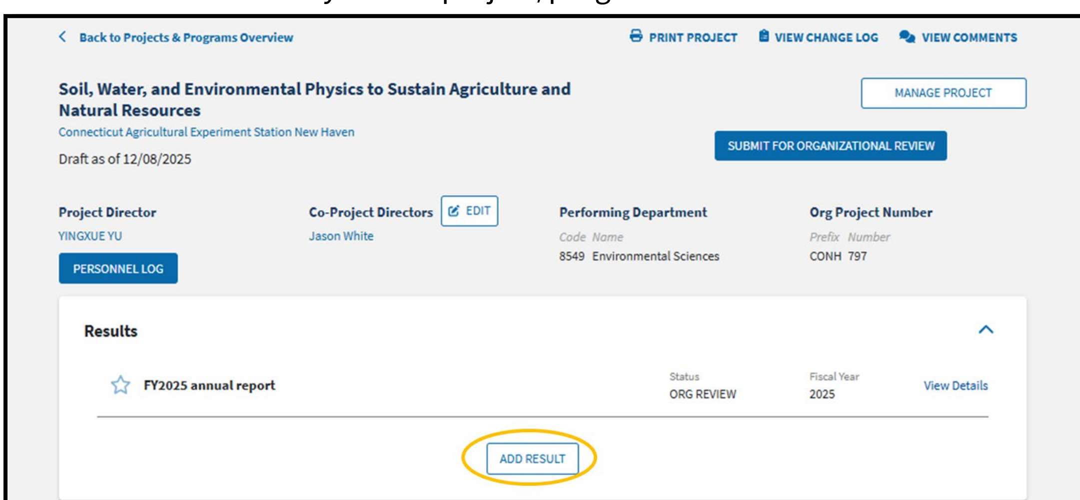
2. Use the filters located in the left column or enter keywords or phrases to locate the Project or Program to add the Result. Click the title of the project or program to enter the Project and Programs Details page.



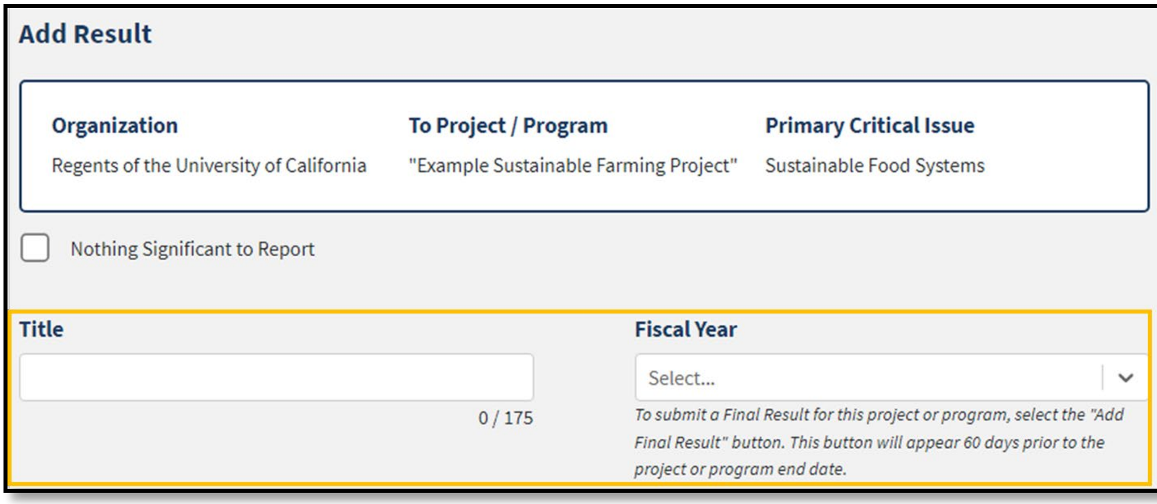
3. On the Projects or Programs Details page, scroll down the Results section and click the caret to expand the Results section and display the Results table.



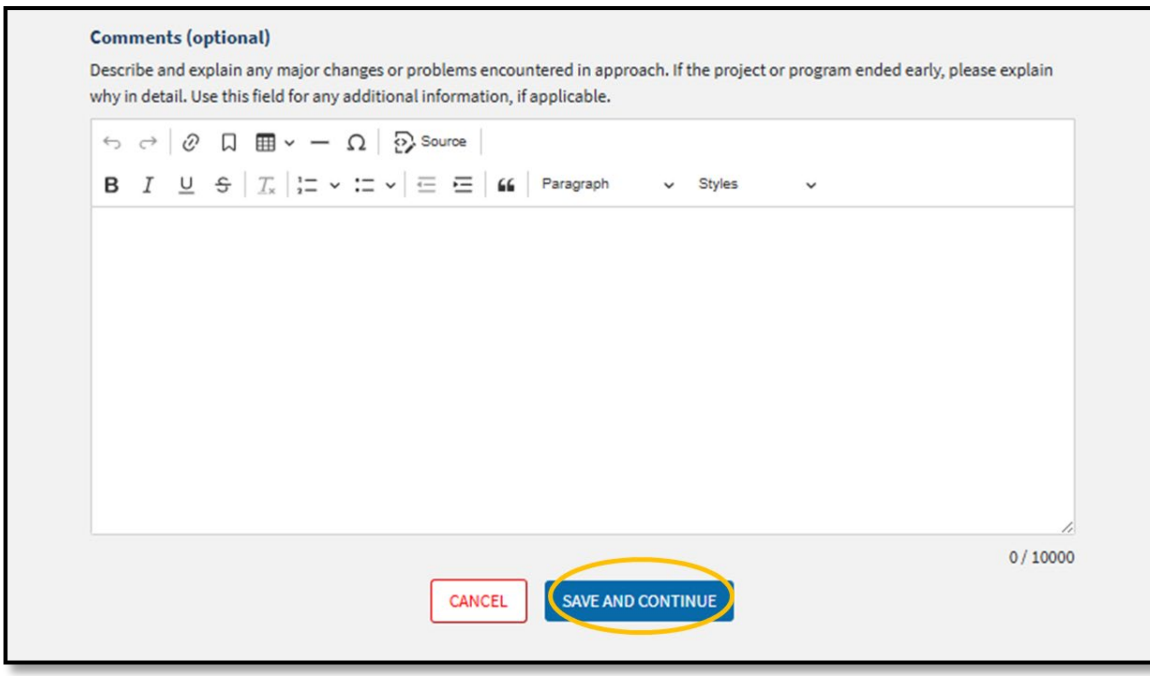
4. Select Add Result or Add Final Result as appropriate. Final Result is only available when the accession is within 60 days of the project/program End Date.



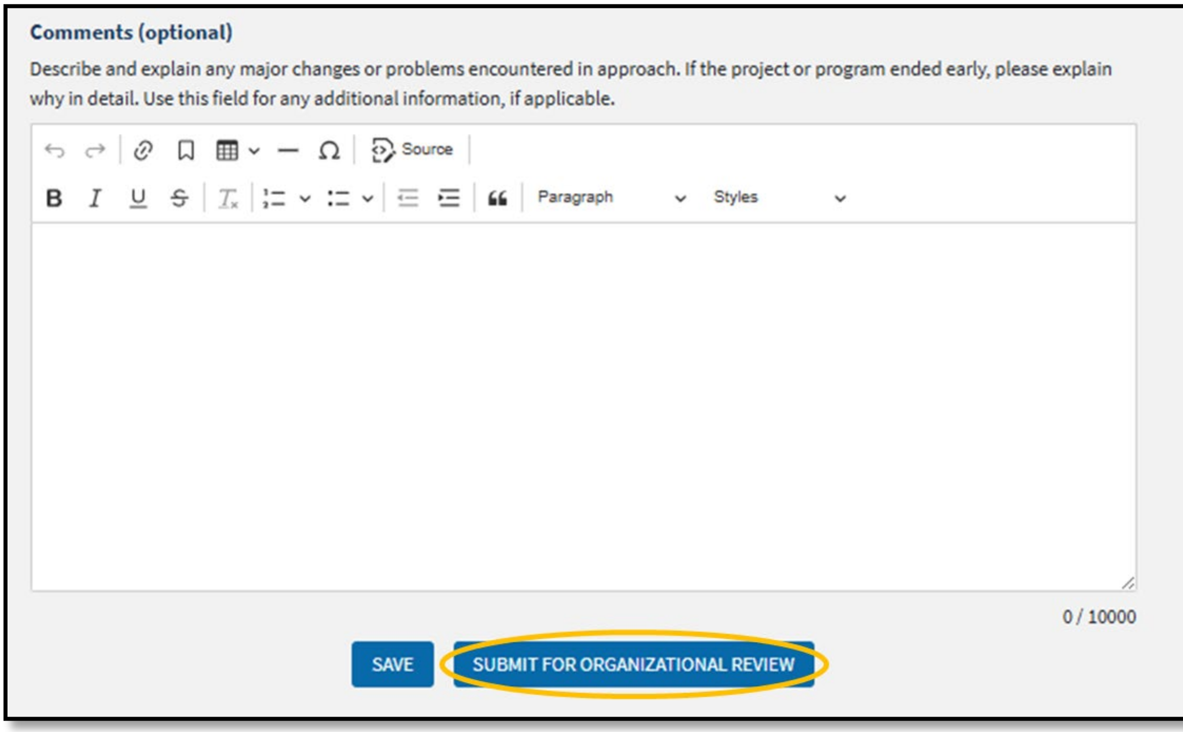
5. After selecting Add Result or Add Final Result, users will be prompted to enter a title and select a fiscal year. NRS will allow multiple Annual Results per fiscal year, so verify the reporting fiscal year before entering the Result.



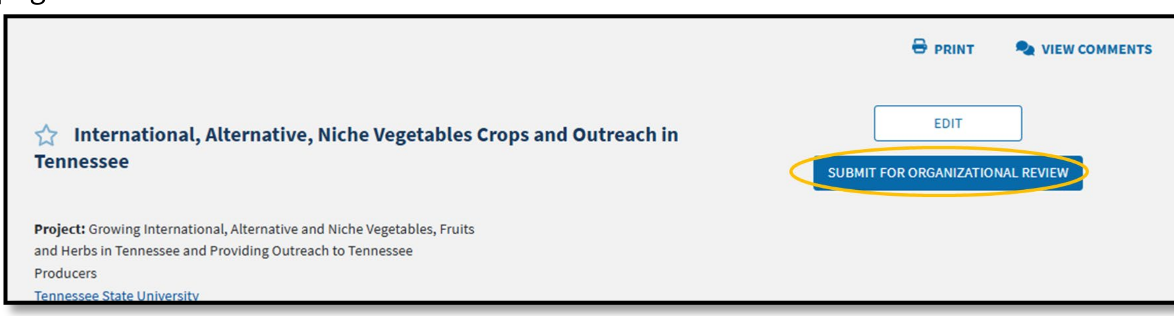
6. Complete the required reporting fields as prompted. For Annual Results, the Comments field is optional. For Final Results, the Comments field is required.
7. At the bottom of the page, you will have the option to select Cancel to delete the Result entry, or Save and Continue.



8. After selecting Save and Continue, a preview of the Result will display. Select Submit for Organizational View to submit the Result to organizational review and proceed through the approval flow.



If you are editing a previously created Result, the action buttons will be located at the top of the page.

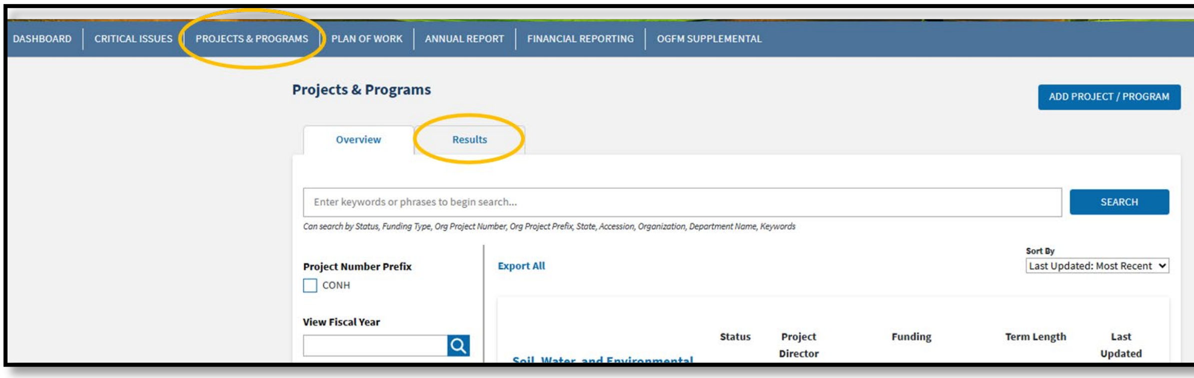


Once in Organizational Review, Directors, Organizational Administrators, and State Contributors can submit the Result to NIFA by selecting Submit for NIFA Review. Alternatively, the Result can be

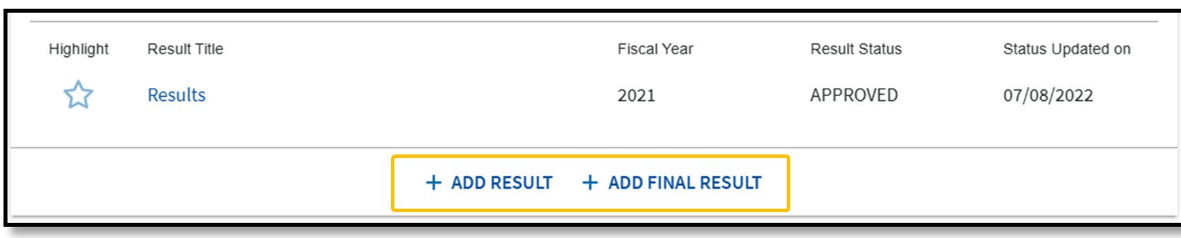
Removed (deleted), Returned to the Project Director for edits.

From the Projects and Programs Module Results Tab

1. Enter the Projects and Programs Menu and click the Results tab



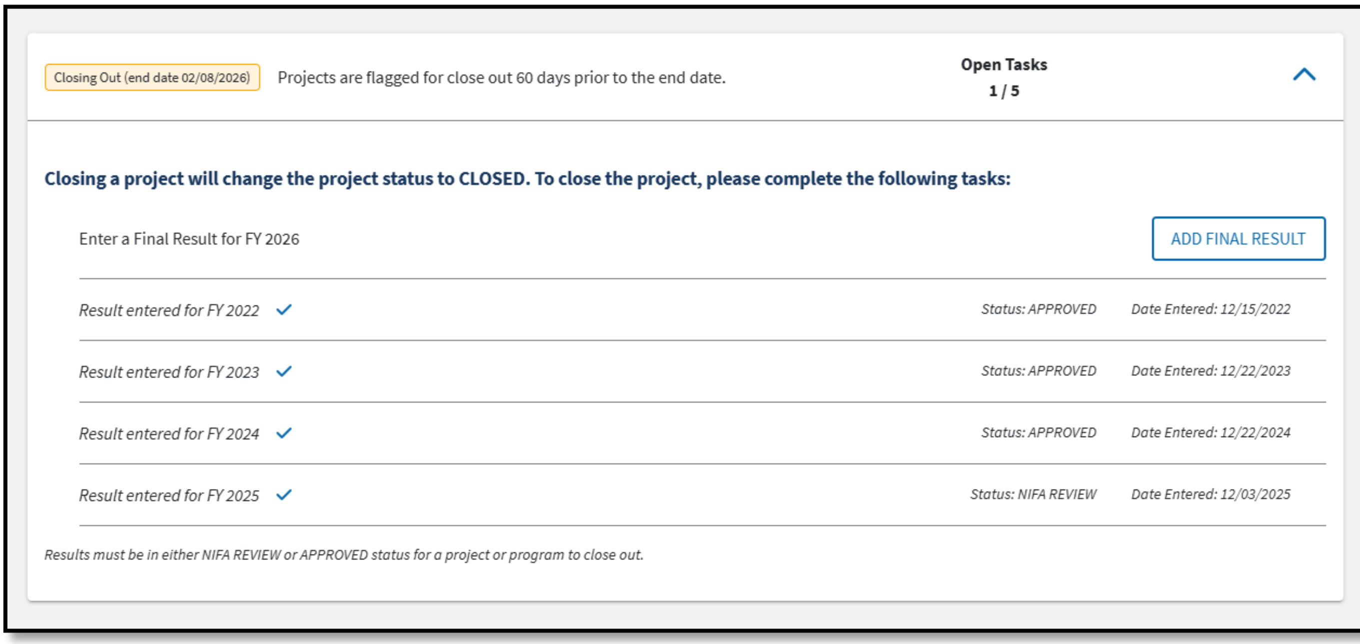
2. Use the filters located in the left column or enter keywords or phrases to locate the Result.
3. Locate the accession you wish to add the Result to and select '+Add Result' or '+ Add Final Result' if applicable.



4. Complete the questions as prompted and submit for Organizational Review and then NIFA Review.

From the Closing Out Task List

Projects and Programs that are within 60 days of their End Date will display a Closing Out Task List on the Project or Program Details page. This task list identifies any outstanding Annual or Final Results required to close out the accession. Results that have been submitted and are in NIFA Review or Approved status will display a blue checkmark next to the corresponding fiscal year. If a required Result has not been created or is still in Draft or Organizational Review status, the task list will prompt the user to add or complete the missing result by submitting it to NIFA Review. To successfully close out a Project or Program, at least one Result must be submitted for each fiscal year the accession was active and a Final Result must be submitted to NIFA Review.



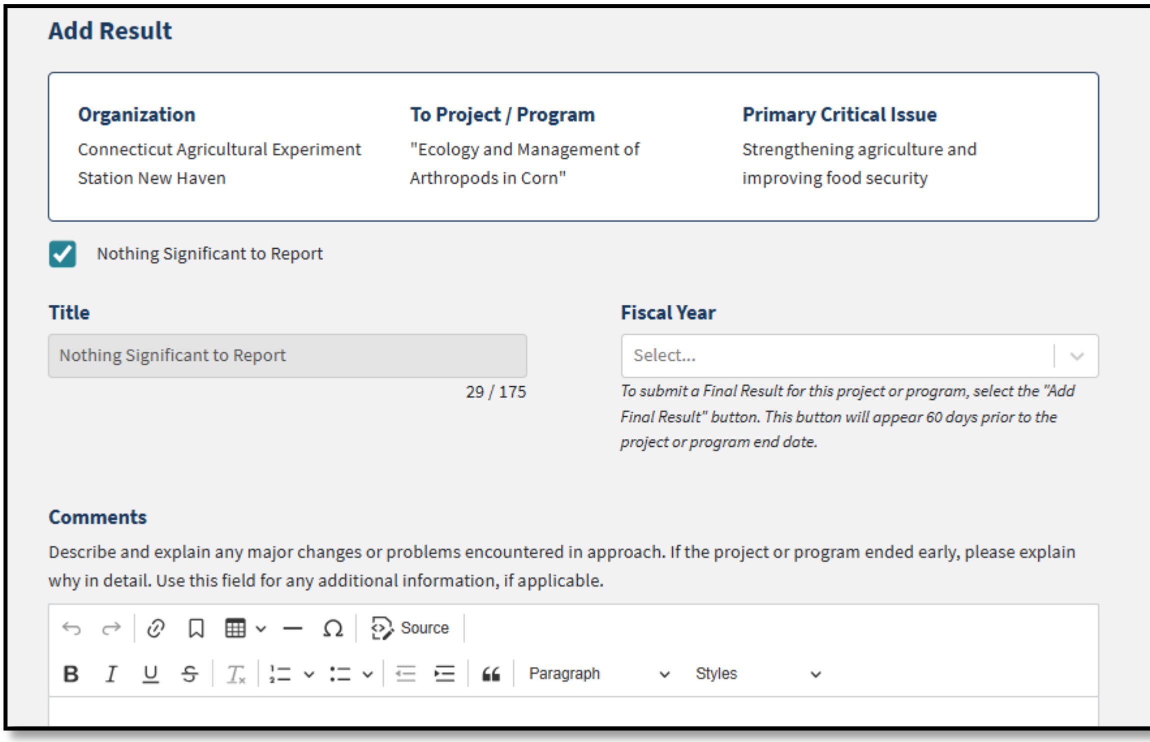
Results can be added directly from the Closing Out Task List by Selecting Add Result or Add Final Result. As conditions are met, the number of Open Tasks will decrease, and the option to add a result will be removed. Additionally, Results entered through the Results Overview tab or the Project or Program Details page will also satisfy closeout requirements and will automatically appear in the Closing Out Task list.

NOTHING SIGNIFICANT TO REPORT

NIFA encourages organizations to submit Results that accurately reflect the progress made during the reporting period. If there are no significant activities or outcomes that occurred during the fiscal year, applicable users may submit a Nothing Significant to Report Result which will satisfy the reporting requirements.

To create a Nothing Significant to Report Result:

1. From the Annual Result Screen, select the Nothing Significant to Report checkbox. The form will automatically switch to an abbreviated number of fields.
2. Select the appropriate Fiscal Year and complete the Comments field. The Comments field is required for Nothing Significant to Report Results and should briefly explain why there are no significant activities for that period.
3. Select Save and then Submit for Organizational Review to continue the approval process.



HIGHLIGHTING RESULTS

Results that significantly exemplify the work being done to address critical agricultural issues can be highlighted. Highlighting the Result in NRS acknowledges the Result had the greatest impact to stakeholders. Within NRS, Results can be highlighted from the Project/Program Details page, Results Overview Tab and the Annual Report of Accomplishments for applicable user roles. To highlight a Result, select the blue arrow next to the corresponding Result. Results entered as Nothing Significant to Report cannot be highlighted. For details on the NRS roles with the ability to highlight, see the Roles section of the NRS Guide.

ADDITIONAL GUIDANCE FOR RESULT TITLES

To provide clarity in identification of Results for review and discussion, please consider the following when creating titles for your Results:

- While the system does note which Fiscal Year (FY) your Result is associated with, consider including the FY in your Result title (i.e., FY 2023 Small Agricultural Business Extension Activities; FY 2023 Development of Native Forage for Ruminants).
- Make your Result title descriptive. This is especially important if you are submitting more than one Result for a FY so that readers can easily tell the difference between the different Results. (i.e., FY 2023 Workshop on Plant Disease Resistance; FY 2023 Analysis of Bovine Genome for Heat Tolerance; FY 2023 Outreach Activities on Farm Worker Safety; FY 2023 Engaging Youth in Community Gardening; FY 2023 Undergraduate Training in Genetic Lab Techniques).
- If there is only one Result for a FY and your progress report provides a broad overview of activities and achievements, a more generic title may be used (i.e., FY 2023 Accomplishments).

RESULTS STATUSES

Results added in NRS undergo a multistep review process. The process flow is explained below through descriptions of the various possible statuses:

Status	Description
Draft	The Result has been created but not yet submitted (or resubmitted). Once a Result is saved, it will display in Draft status. The Project Director or Program Initiator assigned to the accession and other applicable roles are able to edit the Result while in Draft status.
Organizational Review	A Result has been saved and submitted for internal review and approval, or Organizational Review. While in Organizational Review Results can be, edited, submitted to NIFA Review or returned to the PD/I for further edits by applicable roles.
NIFA Review	Projects/Programs are submitted by the organization to NIFA for review. NIFA assesses the Result for compliance & relevance for the capacity funding source. At this stage, the Result may be Retracted for further edits and resubmission. Only Organizational Administrators and Directors are able to submit Results for NIFA Review.
Approved	Approved as submitted. The Result cannot be edited.
Deferred	NIFA has reviewed your Result and determined there are corrections needed. You should receive an email with the details from the National Program Leader. If you do not receive this information, contact nrs@usda.gov. The assigned PD/I or other non-View Only user roles must make corrections and resubmit for NIFA review.

RESULTS EXPORT

To Export Results data, enter the Projects and Programs menu, navigate to the Results Overview tab and select Export All. Please note the export is subject to filters; filtered data will display on the export. To export all available Results information for your organization, remove all filters prior to selecting Export All. The export fields include:

- Result Title
- FY Result
- Status
- Last Updated Date
- Last Updated by
- Result ID
- Highlighted in Annual Report?
- Project Title
- Project Funding Source
- Accession Number
- Org Project Number
- PD/Initiator
- Co-PD/Co-I
- Critical Issue
- Reviewer Name
- Reviewer Email
- Start Date
- End Date
- Final Result
- Project Link
- Result Link

FINANCIAL REPORT MODULE

The Financial Report module in NRS is used to submit annual financial data for capacity-funded research projects and Extension programs.

FINANCIAL REPORT FOR ALL PROJECTS AND PROGRAMS

The Financial Report captures federal and non-federal expenditures as well as all Full Time Equivalents (FTEs) that supported each project or program. Financial data must be entered for every accession that was active at any point during the most recently completed federal fiscal year, which runs from October 1 through September 30.

FINANCIAL REPORT GUIDANCE FOR FINANCIAL ADMINISTRATORS

Access to complete, sign and submit the Financial Report is restricted to users with Financial Administrator permissions. Technical instructions for completing the financial report are located within NRS.

Technical Instructions for Completing Your Financial Report

Completing your financial report for this fiscal year has 3 main steps: Inputting your data, Resolving any errors, and Reviewing the report. Please follow the instructions below to complete your financial report.

Step 1: Download the Template

The template you can download below will provide you with an easy way to organize your data to more smoothly complete your financial report for this fiscal year. Please use this template to organize your data from your organization's accounting system. The template contains all of the research project and extension programs (by project number and accession number) that require financial data for this fiscal year.

You can download this template here:

DOWNLOAD TEMPLATE

Step 2: Fill Out the Template With Your Financial Data

Please fill out the template with all of the information required. You may reorganize, sort, and change the order of the content within this template. As long as the Project number/Accession number are associated with the correct data, the system will be able to process it correctly.

Step 3: Upload Your Data Into the NRS Financial Report

On the next page, you will be presented with a list of all of the research projects and extension programs that require financial data for this fiscal year listed by Project Number and Accession Number. To complete the form, please download and fill out the template provided above. On the next page, look for the "UPLOAD EXCEL" button. Select the button and then select the file where you have completed all of your financial reporting data. Upload the file, and give the system a moment to process the data.

Step 4: Resolve Any Errors

Once the data has been uploaded into NRS, NRS will check all of the lines for any potential errors that may need to be resolved. The message will appear at the top of the page with the line that has the error and what needs to be done to resolve it. There may not be any errors that appear once the data has been uploaded; if so, you can skip this step.

Step 5: Review the Document and Submit

After you've finished uploading data on the following page, please click the "Next" button to review the report and submit the report to NIFA. Once you submit the report, you will have the option to "Retract" it to make changes up until the final financial reporting due date.

NEXT

For detailed instructions on completing and submitting the Financial Report, refer to the Financial Report Guidance for Capacity Funds.

FINANCIAL REPORT PROCESS STATUSES

Status	Description
Draft	The Financial Report has been generated and the template is available. Financial Administrators may upload a completed template or download current data for revision. Once the data has been entered, the **Validate** button checks the data for errors and alerts. Errors must be resolved before proceeding. Alerts may require comments before the report can be signed. If there are no errors, the **Next** button will be available to proceed to the Report Review screen.
Organizational Review	Once the Financial Report has been signed by at least one Financial Administrator, the report is in Organizational Review status. Additional signatures may be added, but are not required, before submitting the report to NIFA.
Submitted	Financial Report has been signed off by at least one Financial Administrator and submitted to NIFA. Additionally, Financial Administrators can recall the report by using the **Retract** button to make corrections. The Financial Report can then be edited, validated, signed, and resubmitted.

OGFM SUPPLEMENTAL MODULE (SPECIFIC 1862 LGUS ONLY)

The OGFM Supplemental module is used to complete and submit the Combined Research and Extension Office of Grants and Financial Management (OGFM) Multi-State and Integrated Activity Supplemental Form for applicable institutions.

The OGFM Supplemental Form is an additional annual financial reporting requirement for specific 1862 Land-grant Universities that are statutorily required to expend a designated percentage of Hatch Act and Smith-Lever Act formula funds on multistate Extension and integrated research and Extension activities. This requirement does not apply to 1862 Land-grant Universities in American Samoa, Guam, Micronesia, Northern Marianas, Puerto Rico, and the U.S. Virgin Islands.

The OGFM Supplemental Form is completed annually for the most recently completed federal fiscal year (October 1 – September 30). The due date is established by NIFA and varies year to year. NIFA will announce the annual due date and form availability on the NRS website.

OGFM SUPPLEMENTAL GUIDANCE FOR FINANCIAL ADMINISTRATORS

Access for filling out and submitting the OGFM Supplemental Form is restricted to users with Financial Administrator permissions that are with organizations required to fill out that form. For full instructions on that process, see the OGFM Supplemental Form Guidance.

OGFM SUPPLEMENTAL FORM STATUSES

Status	Description
Draft	The OGFM Supplemental Form has been generated and is available for editing. Once expenditure data has been added and the form filled out with waiver request uploaded (if required), the **Sign Report** button will be available to proceed to the Report Review screen.
Organizational Review	The OGFM Supplemental Form has been signed by at least one Financial Administrator, the report is in Organizational Review status. Additional signatures may be added before submitting to NIFA. Additionally, Financial Administrators can **retract** the report to make corrections. The OGFM Supplemental can then be edited, validated, signed, and resubmitted.
Submitted	The OFGM Supplemental Form has been signed by the organization and submitted to NIFA for review by OGFM staff.
SGMS Review	If an OGFM Supplemental Form requires a waiver, a secondary review will be performed by a Senior Grants Management Specialist with OGFM.
Deferred	If revisions are required the OGFM Supplemental status will be ***deferred***, and Financial Administrators are able to edit the form to make the requested changes.
Accepted	When OGFM review is completed and the form is accepted, the status will be changed to ***Accepted*** and the date the form was accepted will be displayed. OGFM reviewers may include additional comments on the form in the Official Comments to Land Grant University field. Once in Accepted status, OGFM Supplemental Forms cannot be edited, deleted or retracted.

ANNUAL REPORT (AREERA ONLY)

The Annual Report of Accomplishments highlights the most significant achievements, impacts and outcomes of all research projects and Extension programs for a state or institution in the prior fiscal year. The Annual Report is required by AREERA for institutions and territories that receive Hatch (regular and Multistate), Smith-Lever 3(b) & 3(c), Evans-Allen (Section 1445), and 1890 Extension (Section 1444) funding. If your institution does not receive these funding types, you are not required to submit the Annual Report.

The due date for the Annual Report and all other capacity reports can be found on the NRS Home Page.

ANNUAL REPORT MODULE

The Annual Report Module contains the Annual Reports for each state. If your state has multiple Land-grant Universities and submits a joint report, each institution will see the Annual Report within the module. All Annual Reports created during or after FY 2022 are available in NRS. For Annual Reports prior to FY 2022, please contact the NRS Help Desk (nrs@usda.gov).

Annual Report Module Permissions

Below are the user roles and permissions for the Annual Report module.

Table 5. Table of Annual Report User Permissions

User Role	Permission
Director	Create, Edit, Sign the Report, Submit for Organizational Review, and Submit to NIFA Review (when all signatures have been provided)
State Contributor	Create, Edit, and Submit to Organizational Review
All Roles within the Organization	View and print Approved Annual Reports

Annual Report Module Features

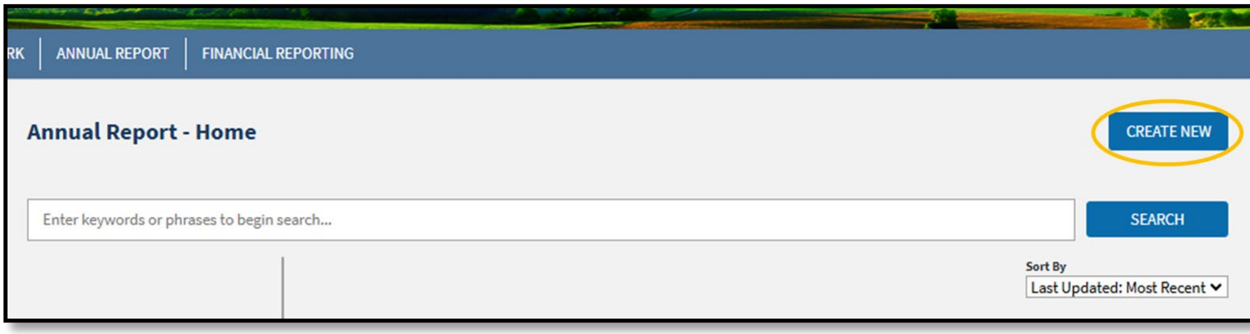
All existing Annual Reports are displayed within the Annual Report module. Approved Reports are no longer editable but can be opened and reviewed at any time.

Within the Annual Report module, users can:

- Search title, status, fiscal year, and the name of the last user that updated the report
- Filter the Fiscal Year, Status (Draft, Org Review, NIFA Review, Approved, Deferred), State, and Organization
- Sort by Fiscal Year, Status, Last Updated, and Title

Creating an Annual Report

To create an Annual Report, login to NRS as a State Contributor or Director and select the Annual Report tab from the Quick Menu. Once on the Annual Report – Home page, click the blue Create New button which will create the Annual Report for the fiscal year. If there are outstanding Annual Reports from prior fiscal years, they will be created first. If there are no additional Annual Reports that can be created, "All the Annual Reports for this organization have already been created." will display on your screen.



Report Details Page

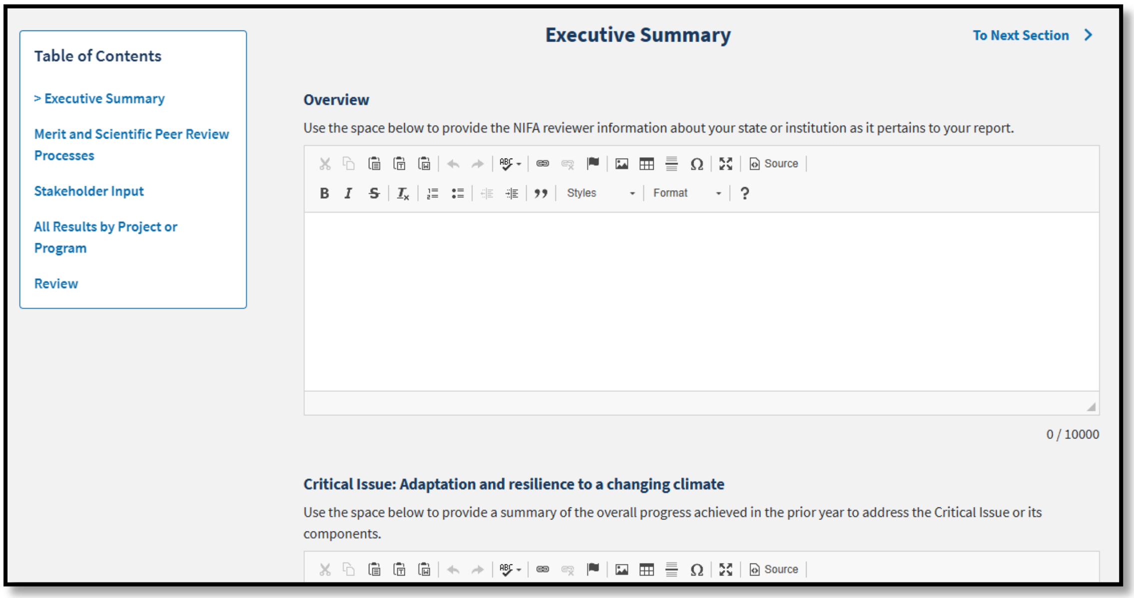
When initially entering the Annual Report, the Contributing Organizations, associated Directors and Table of Contents for the five report components will be listed on the Report Details page. Select Start to begin the Annual Report or select a section from the Table of Contents to jump to that area of the report.

ANNUAL REPORT COMPONENTS

The Annual Report has five components: Executive Summary, Merit and Scientific Peer Review, Stakeholder Input, All Projects and Programs, and Review. Directions for completing the report is listed above each field. A maximum of 10,000 characters can be entered into each report field. The Annual Report fields and description are listed below.

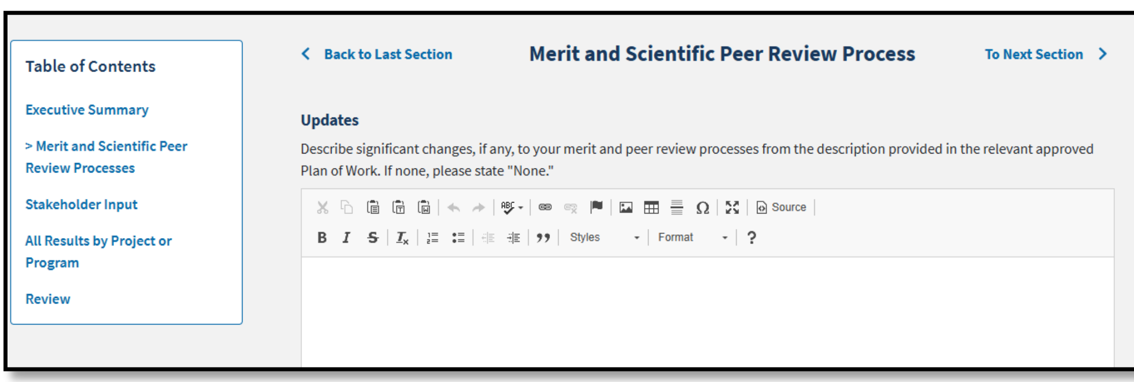
Executive Summary

- **Overview**
  Use the space below to provide the NIFA reviewer information about your state or institution as it pertains to your report.
- **Critical Issue(s): <each critical issue active in the reporting fiscal year will display>**
  Use the space below to provide a summary of the overall progress achieved in the prior year to address the Critical Issue or its components.



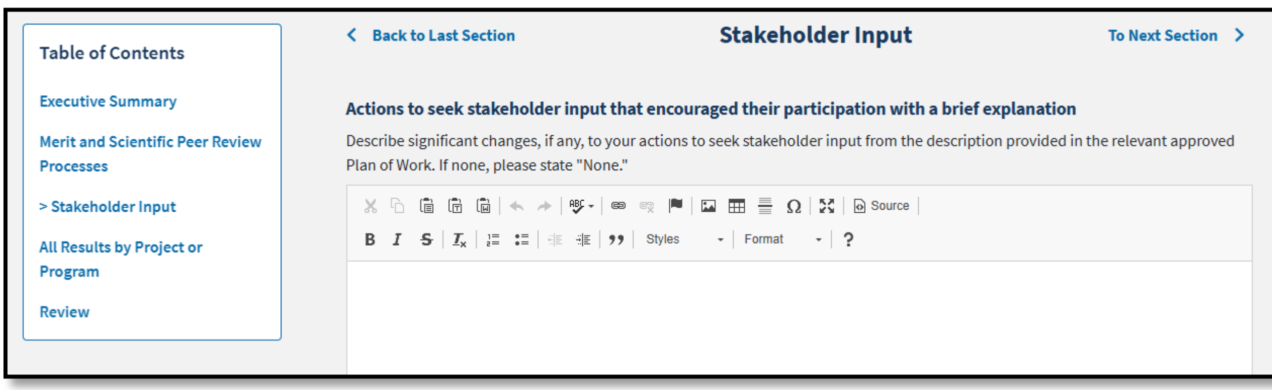
Merit and Scientific Review Process

- **Updates**
  Describe significant changes, if any, to your merit and peer review processes from the description provided in the relevant approved Plan of Work. If none, please state "None."



Stakeholder Input

- **Actions to seek stakeholder input that encouraged their participation with a brief explanation**
  Describe significant changes, if any, to your actions to seek stakeholder input from the description provided in the relevant approved Plan of Work. If none, please state "None."
- **Methods to identify individuals and groups and brief explanation**
  Describe significant changes, if any, to your methods to identify individuals and groups from the description provided in the relevant approved Plan of Work. If none, please state "None."
- **Methods for collecting stakeholder input and brief explanation**
  Describe significant changes, if any, to your methods to collect stakeholder input from the description provided in the relevant approved Plan of Work. If none, please state "None."
- **A statement of how the input will be considered and a brief explanation of what you learned from your stakeholders**
  Provide a brief statement on how you used your stakeholder input this past year to guide implementation of the relevant approved Plan of Work.

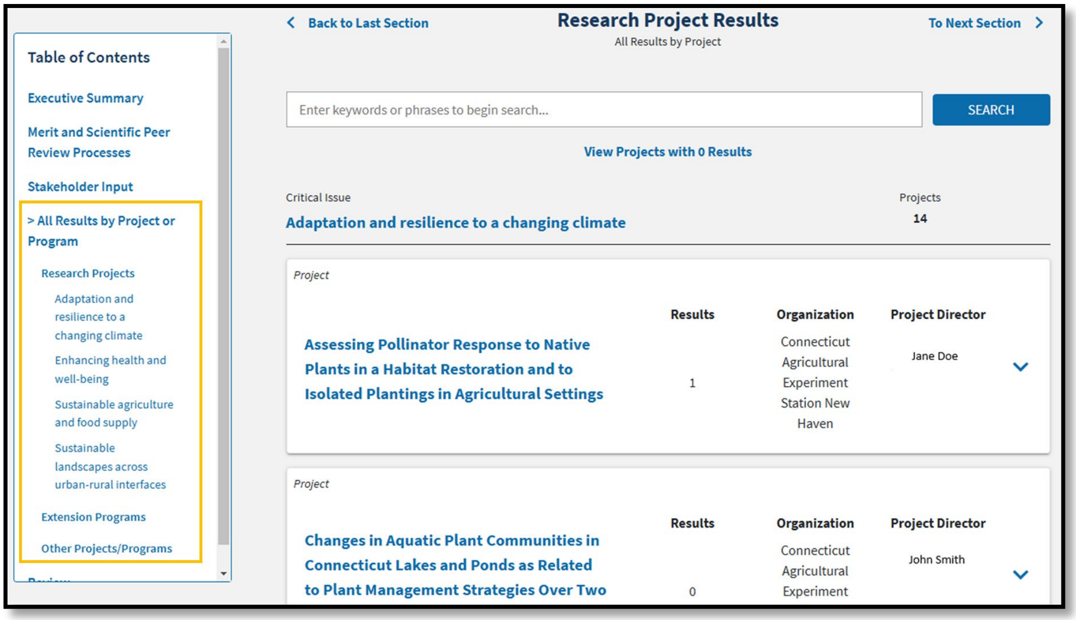


All Results by Projects and Programs

The All Results by Projects and Programs section provides an opportunity to add, edit, or highlight Results from the prior fiscal year. This information is automatically generated by NRS and includes accessions active during the year of reporting, categorized by research project, Extension program, and Other Projects/Programs. If the reporting institutions have both research and Extension Results, research Results will display first. Results are grouped by Critical Issue. To add, edit, or highlight Results, enter keywords or phrases in the search bar or navigate to the applicable Critical Issue, then expand the associated project or program. Results in draft status and Results for fiscal years outside of the reporting year will not be displayed in the Annual Report.

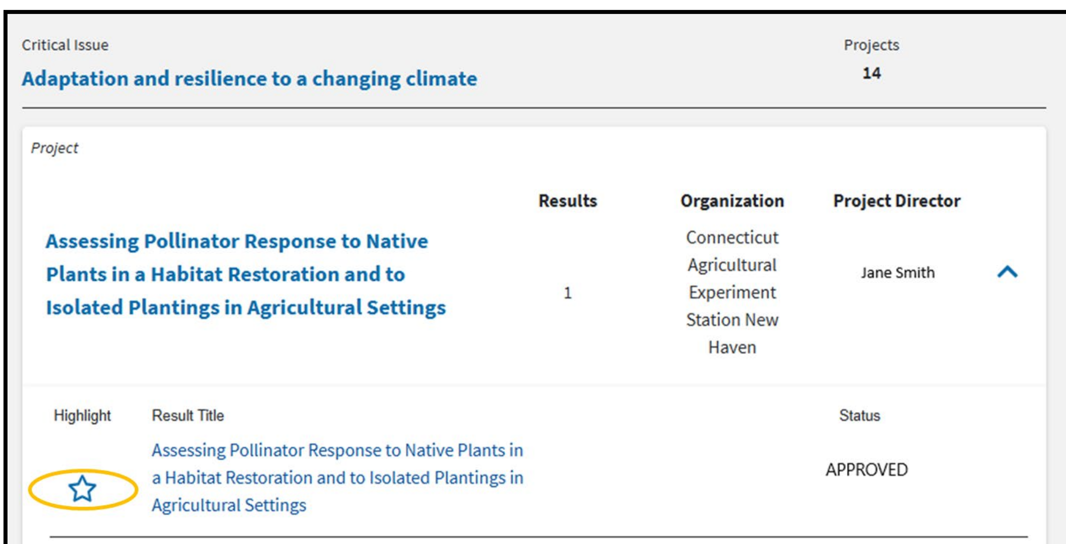
From the Annual Report, Directors can add, edit, or modify results in Organizational Review and NIFA Review for projects and programs within their own institution. Select View Projects/Programs with Zero Results to filter the projects or programs that do now have a result for the reporting fiscal year.

Other Projects/Programs include a list of projects and/or programs without a Critical Issue, Multistate Projects, and Integrated Programs.



Highlighting Results in the Annual Report

Highlighting the Result acknowledges the Result had the greatest impact on stakeholders. To highlight a result, click on the white star next to the associated Result, which will change the star to blue. Within the Annual Report, a Director can only highlight Results created by their own organization. Highlighted Results display at the top of the All Projects and Programs section on the Review screen and final version of the report. Only results that occur within the current reporting fiscal year can be highlighted. Results entered as Nothing Significant to Report cannot be highlighted.



Review Report

The Review Report page displays all sections of the Annual Report to review the report for completeness.

Annual Report Submission Errors

If any required text fields are left blank, errors will display on the Review Report page and alert the user to the sections of the report that contain the error. All errors must be resolved to sign the Annual Report for NIFA Review. To resolve the error, select the Edit icon next to the error message which will jump the user to the impacted field to provide the required information.

Annual Report Submission Process

NRS users assigned a State Contributor or Director role may add, edit or manage the Annual Report. Organizational Administrators should verify users associated with each role before creating the Annual Report. It is strongly suggested to make any role changes prior to creating an Annual Report.

Once created, multiple State Contributors and Directors can contribute to the draft and submit the draft for Organizational Review. If there are multiple organizations reporting jointly, any organization may submit the report for Organizational Review or retract the report to draft to continue editing. Once submitted to Organizational Review, the Directors then have the option to review and sign the report which will submit the Annual Report for NIFA Review or edit the report which will revert the report to draft. Reverting the report to draft status will require all Directors to re-sign the report. When the last Director signs the Annual Report, the report is automatically submitted to NIFA for review. A green signed icon displays for each Director as they sign off.

NIFA conducts a review of the report and provides comments back to the organization(s) within NRS. NIFA may defer the report, sending the report back to the organizations for required changes. A NIFA Division Director also performs a second review before the report is finalized.

ANNUAL REPORT STATUSES

Status	Description
Draft	Annual Report has been saved but not yet submitted.
Organizational Review	Annual Report has been submitted for review by Directors • Directors and State Contributors can **edit** and re-open it for further revisions (requires all to re-sign). Directors can **return** the Annual Report to draft for revisions (requires all to re-sign).
NIFA Review	Annual Report has been signed off by the organization(s) and submitted for review by NIFA. The following actions may be taken by NIFA reviewers before submitting for Division Director Review: • Recommend approval with official comments from the reviewer • Recommend deferral with official comments detailing feedback for edits Additionally, State Contributors and Directors can **retract** the Annual Report from NIFA Review and make changes. The Annual Report can then be resubmitted for NIFA Review.
Division Director Review	A NIFA Division Director performs a secondary review to finalize the official comments and formalize the decision. It may be sent back to the NIFA reviewer for revision of the official reviewer comments if deemed necessary before proceeding to Approved or Deferred status.
Approved	The Annual Report has been approved and is now active. If there is an issue and the report needs to be edited, contact the NRS Help Desk (nrs@usda.gov) for assistance.
Deferred	Annual Report has been deferred and official comments are provided by NIFA on requested revisions and/or additions. Edits should be made, and the AR should be resubmitted for NIFA review.

RESOURCES AND ASSISTANCE

WEB RESOURCES

Please visit the following webpages for additional information related to the NIFA Reporting System:

- NIFA Reporting System Home Page: Capacity reporting deadlines; NRS application; links to other NRS resources; contact information; subscribe to the email list to receive NRS communications
- NIFA Reporting System Resources: NRS User Guide; NRS Registration Guide; previously recorded monthly webinars listed by date and topic; monthly webinar recap documents
- NIFA Reporting System FAQs: Frequently Asked Questions gathered from webinars, conferences and Help Desk inquiries categorized by module and/or topic for easy navigation, with regular updates
- NIFA Reporting System Learning Community: Offers on-demand access to NRS video tutorials with planned videos for each module and more

ASSISTANCE

For assistance with NRS, please email nrs@usda.gov. If you are asking about an issue with a specific research project or Extension program, make sure to include the accession number in your inquiry.

APPENDIX: EAUTHENTICATION & LOGIN.GOV USER

REGISTRATION FOR NRS ACCESS

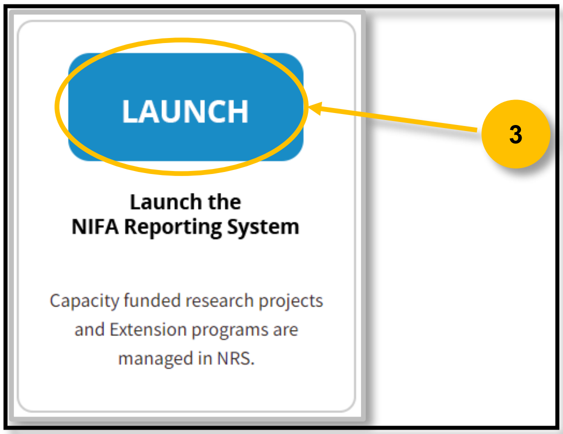
All users of the NIFA Reporting System will need to complete registration by creating a Login.gov account and completing identify verification to link to USDA's eAuthentication (eAuth). New users will then need to request a role from their Organizational Administrator(s) at their institution.

Currently, users with already existing eAuth accounts may continue to login with their eAuth user/password; in the future those users will also be required to switch to using Login.gov so we recommend that you create a Login.gov account to link to eAuth prior to this change. Additionally, some users may have USDA employee/contractor logins and will not use the instructions in this guide. If you are not sure what type of account you have, contact the NRS Help Desk (nrs@usda.gov) for assistance in determining which one you have or if you need to create a new account.

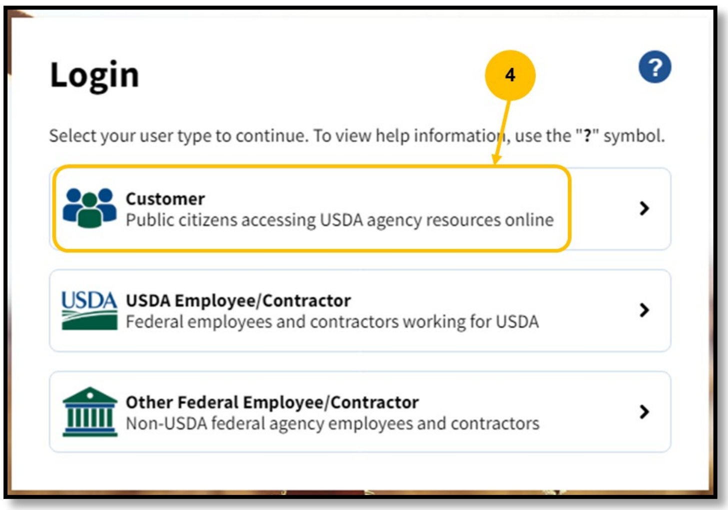
ACCOUNT CREATION

1. Navigate to the NIFA Reporting System by clicking NIFA Reporting System.
2. The NIFA Reporting System home page is displayed.

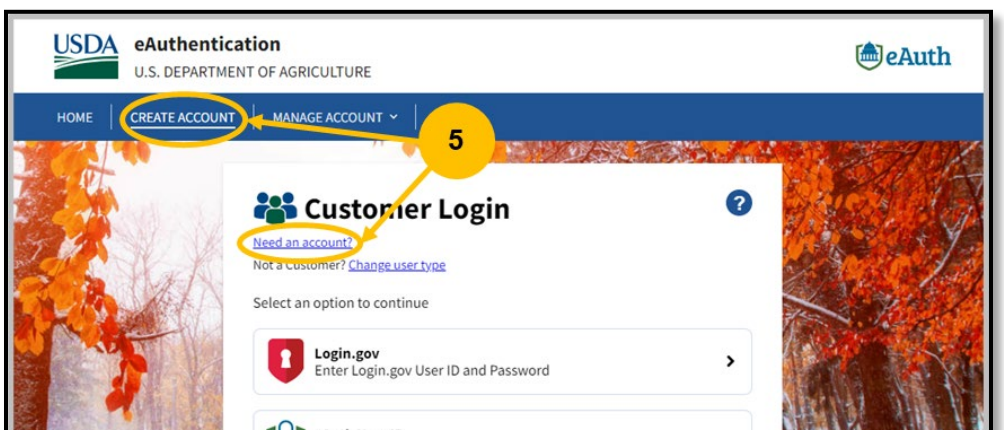
3. Locate the *'Launch the NIFA Reporting System'* section, mid-way down the page, select **LAUNCH**.



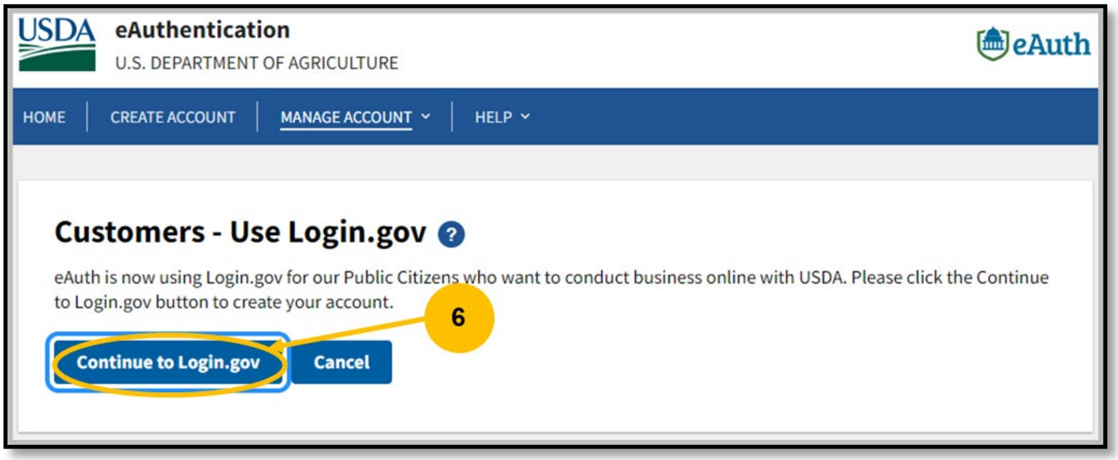
4. At the Login page select **Customer** as the customer type.



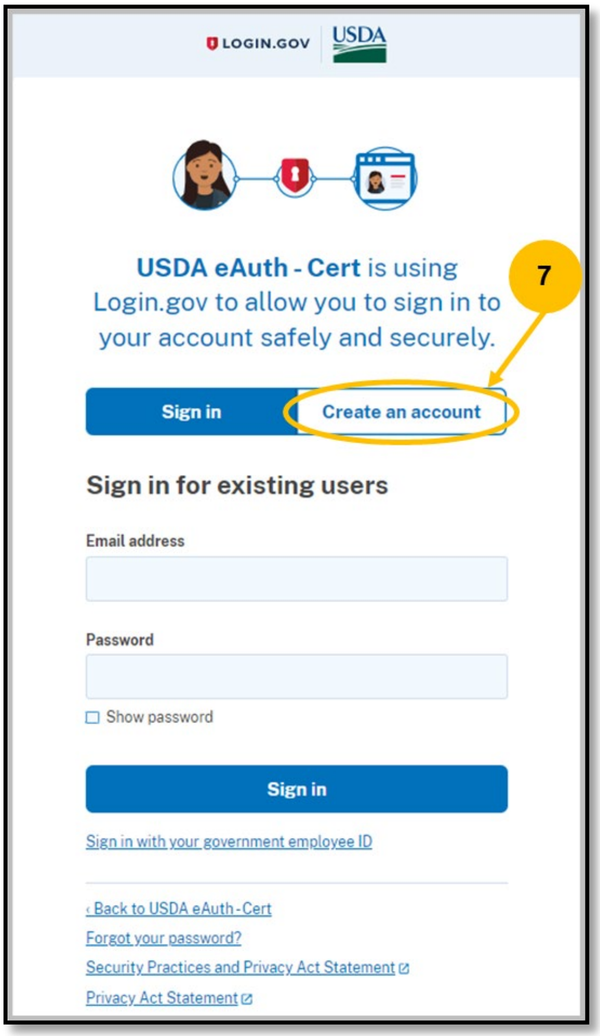
5. To create a new account, select **Create Account** or **Need an account?**



6. Select **Continue to Login.gov**.

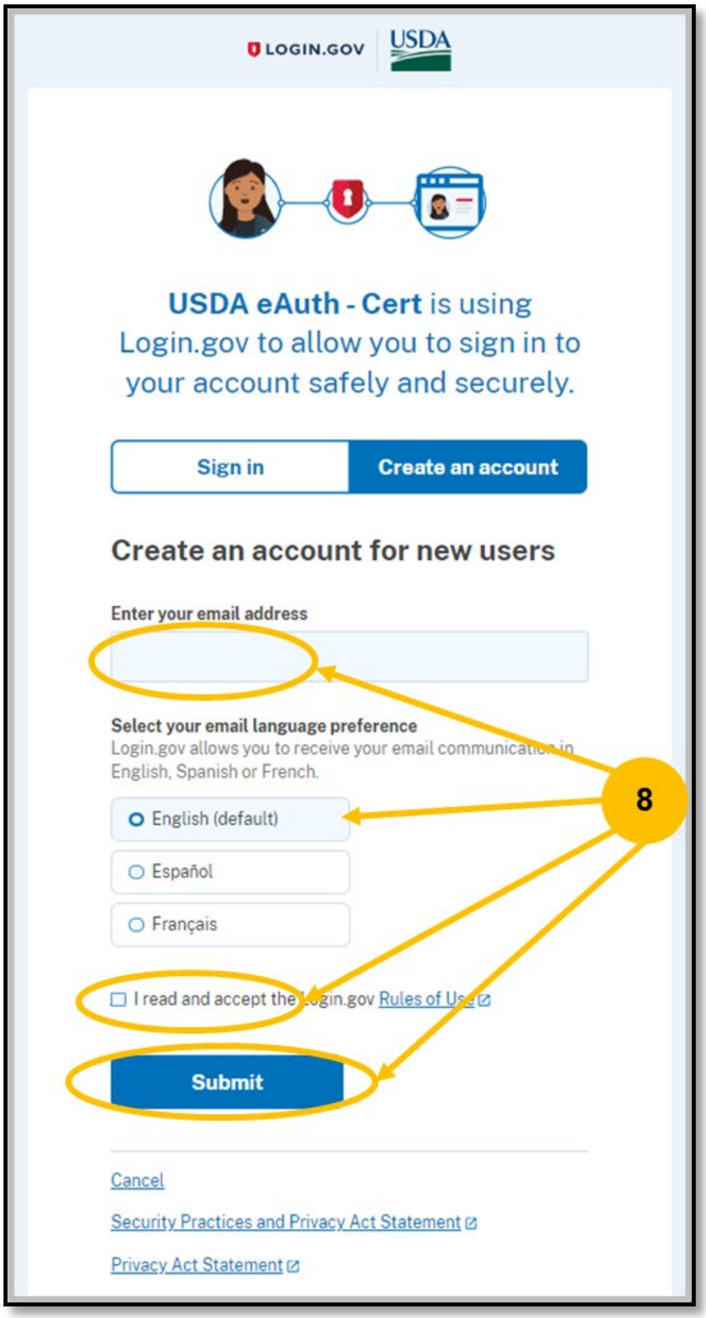


7. At the Login.gov page, select **Create an account**. If you already have a Login.gov account, select **Sign in** and skip to step 17.



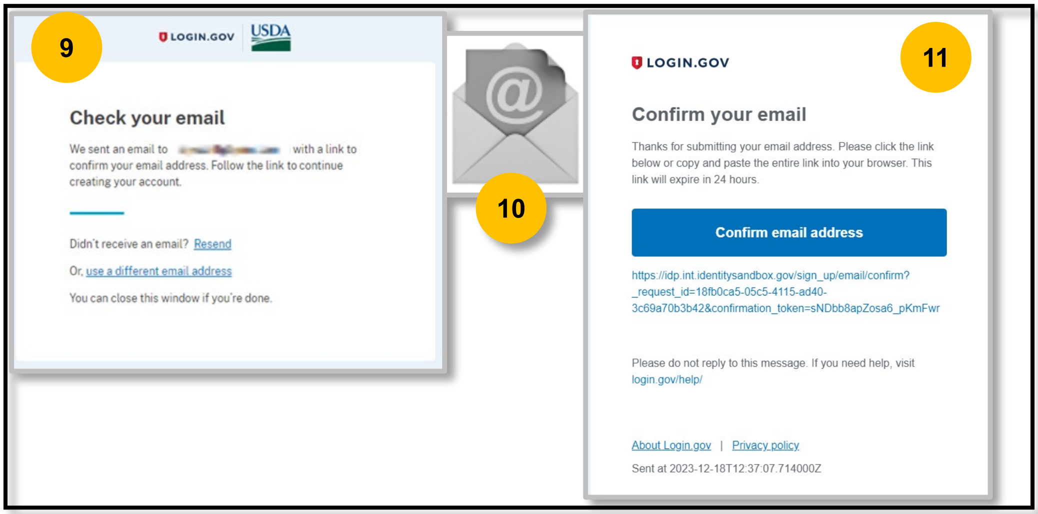
8. The "Create an account for new users" page will display. Input your **email address**, select **email language preference** and select the checkbox *"I read and accept the Login.gov Rules of Use checkbox"*, then select **Submit**.

   Note: If you are creating an account for an already existing NRS user account, make sure you use the same email address. Otherwise, your NRS user account will need to be edited.



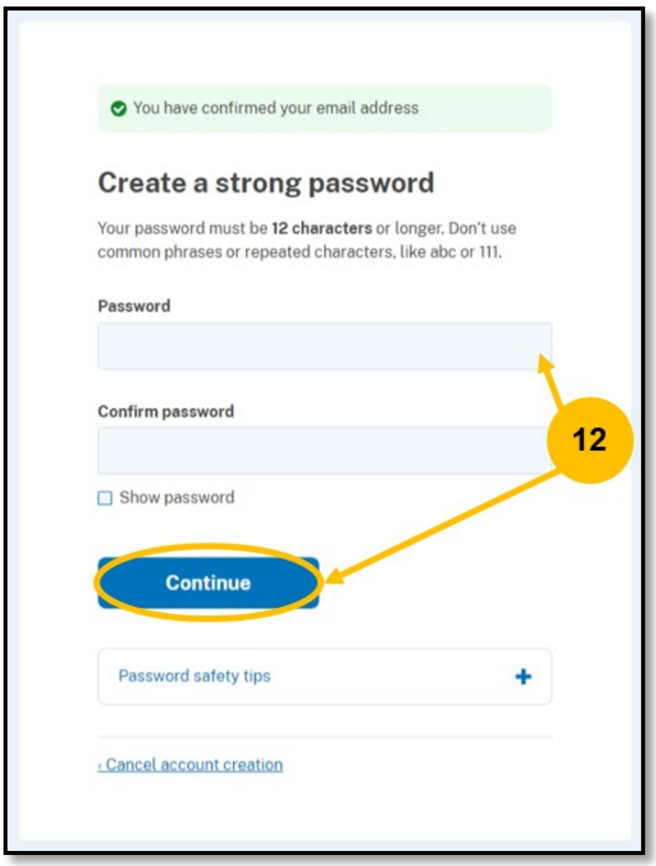
9. You will receive an email to confirm your email address.
10. Open the "Confirm email address" email.

Click **Confirm email address**.



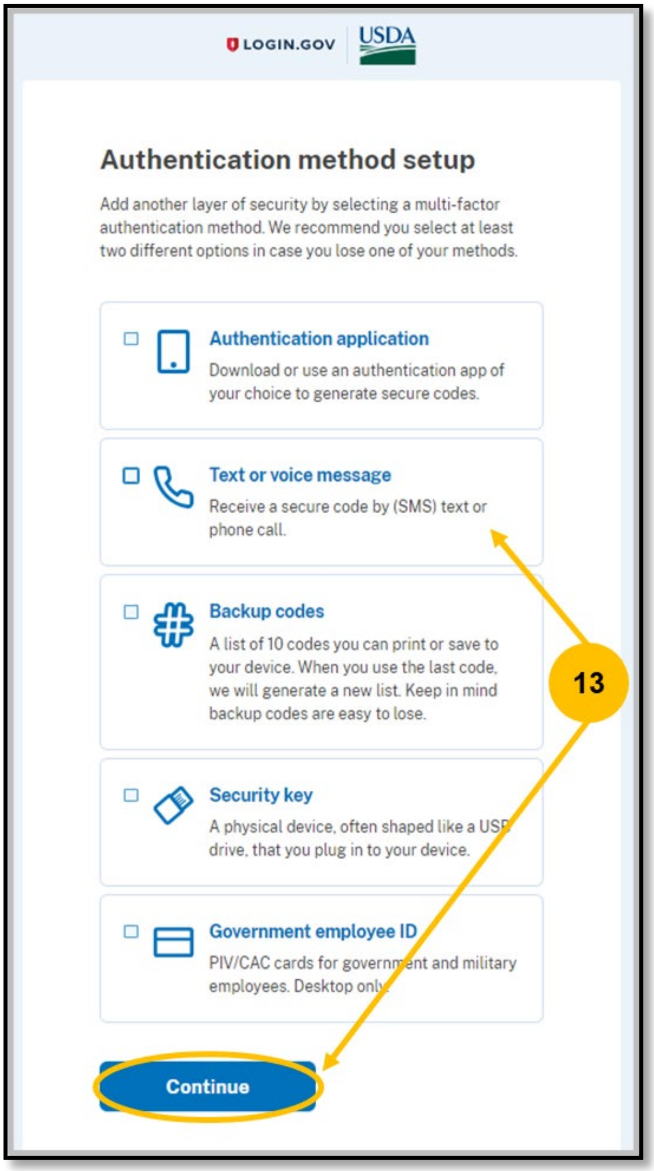
11. Email is confirmed. Create a strong password, select **Continue**.

NOTE: Expand the Password safety tips for guidance on creating a strong password.



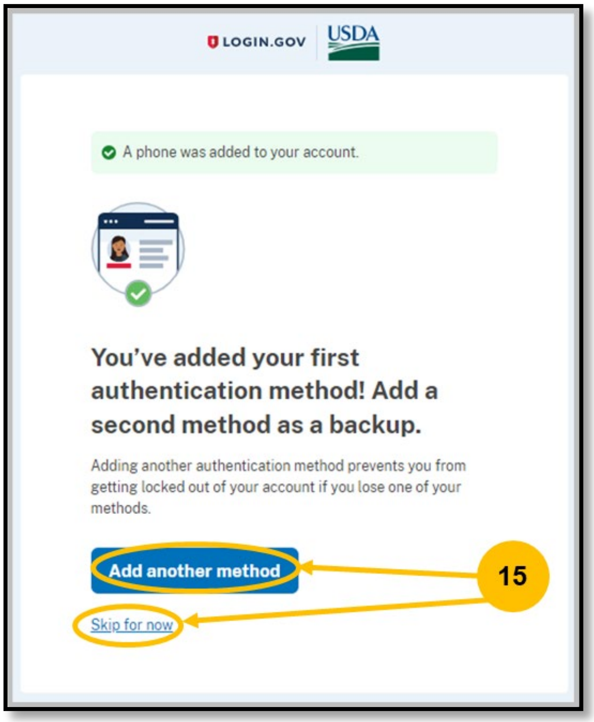
12. Login.gov utilizes multi-factor authentication methods to prevent unauthorized users access to your account. Please select at least one authentication method, select **Continue**.

    Note: If you are in an area outside of the continental United States and are experiencing issues with text verification through your cellular phone, you must select the **Authentication application** option and download an authentication app such as Google Authenticator for this purpose. Alternatively, you may use one of the other non-phone options.



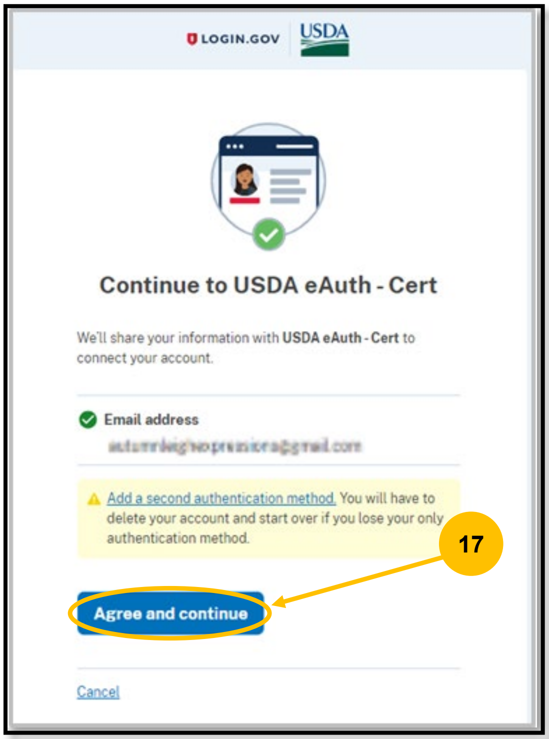
13. Follow the onscreen prompts for the authentication method selected.
14. Upon successful completion of the selected authentication method, you will be presented with the option to **Add another method** (16) or **Skip for now** (17).

    NOTE: It is highly recommended to complete two authentication methods to ensure you have a way to unlock your account if you lose one of your methods (i.e., changing your phone number).

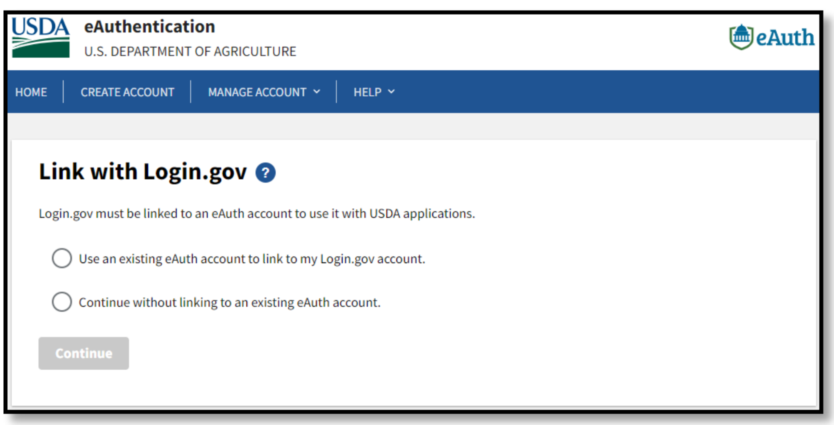


15. Select **Add a second authentication method**, follow the onscreen prompts to complete the second authentication method.
16. Select **Skip for now,** the "Continue to USDA eAuth – Cert" page displays, select **Agree and continue** to allow your information to be shared with USDA eAuth - Cert.

NOTE: To add additional authentication methods, log in to Login.gov access your account profile, and select an additional authentication method. See Updating Account Information.

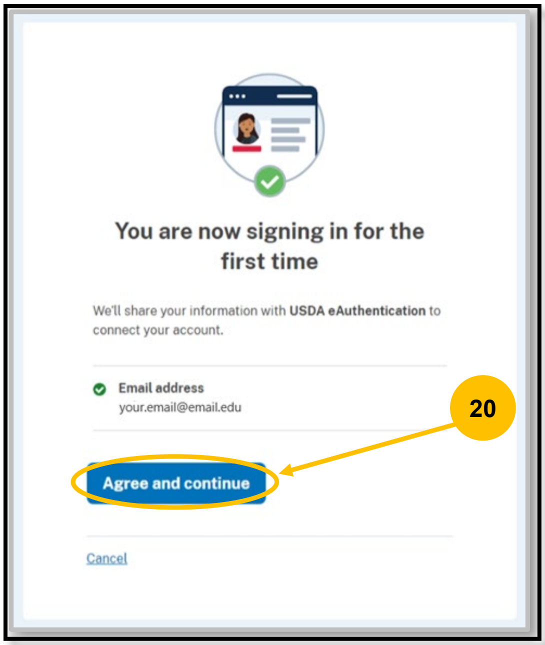


17. The Link with Login.gov page displays with the option to **Use an existing eAuth account to link to my Login.gov account** (continue to step 19) or **Continue without linking to an existing eAuth account** (skip to step 22). If you are unsure if you have an existing eAuth account, please email nrs@usda.gov for assistance and include what email address you are using.

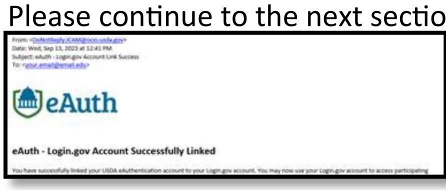


18. If you currently have an eAuth account, select **Use an existing eAuth account to link to my Login.gov account,** select **Continue**.

19. Select **Agree and continue** to allow Login.gov to share your information with the USDA eAuthentication.



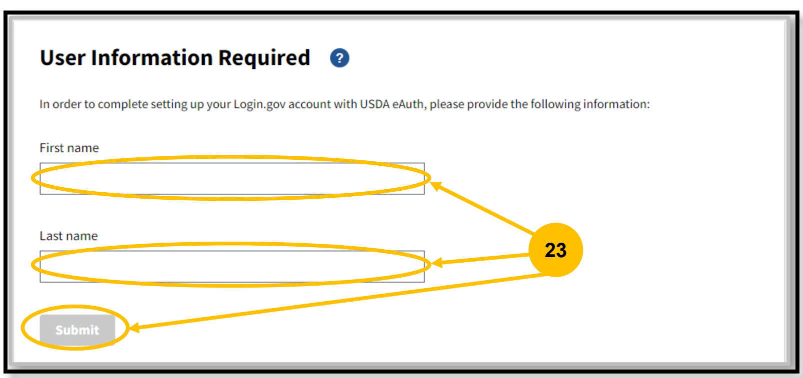
20. You should receive an email confirming that you have successfully linked your Login.gov account with eAuth. Now that you have completed the registration process and your eAuthentication account is linked to your Login.gov account, please contact your Organizational Administrator to **request a role** if needed. Please continue to the next section on Identity Verification if you have not already completed that process.



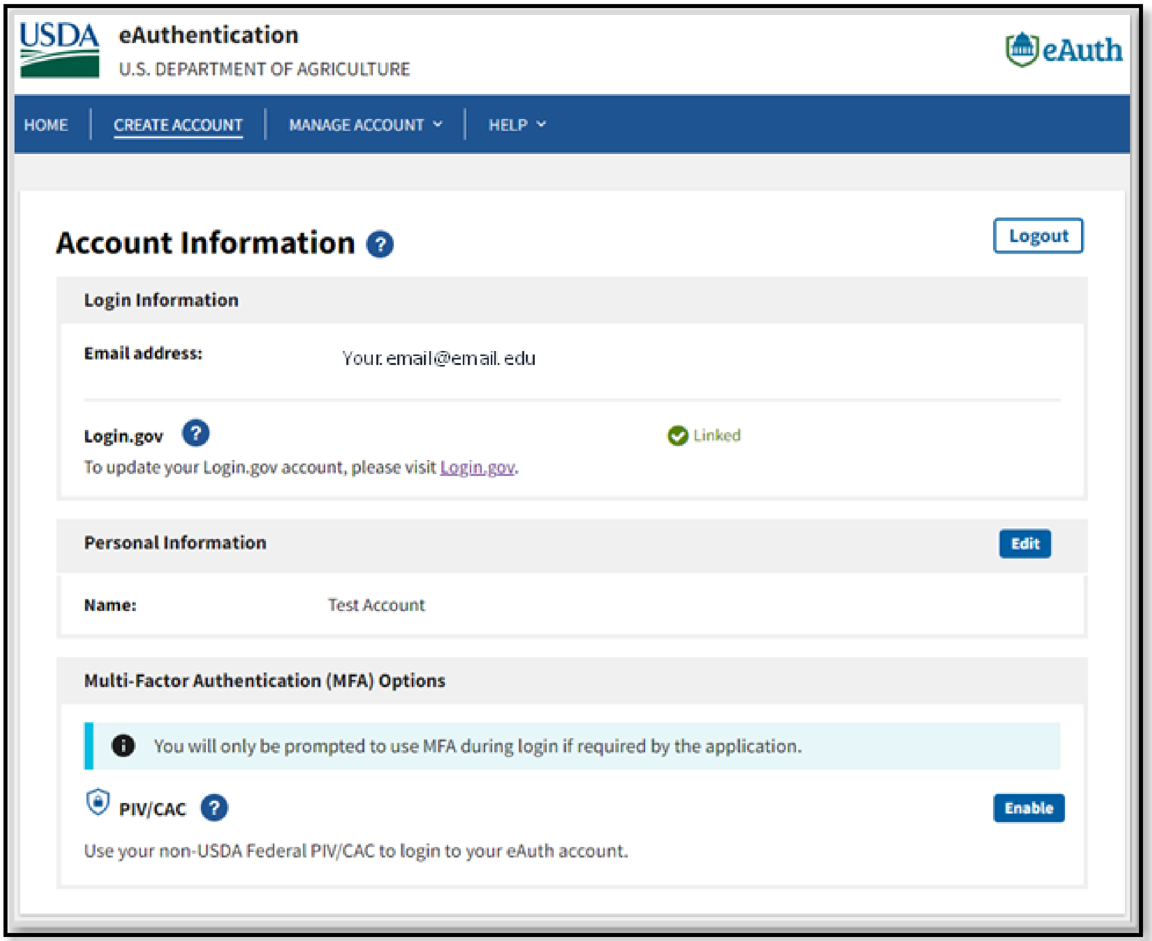
21. If you are a new user (no eAuth account), select **Continue without linking to an existing eAuth account**, select **Continue**.

    NOTE: This will automatically establish an eAuth account and link it to your Login.gov account.

22. The User Information Required page displays, input your **First Name** and **Last Name,** select **Submit**.



23. Account information page is displayed, select **Logout**.



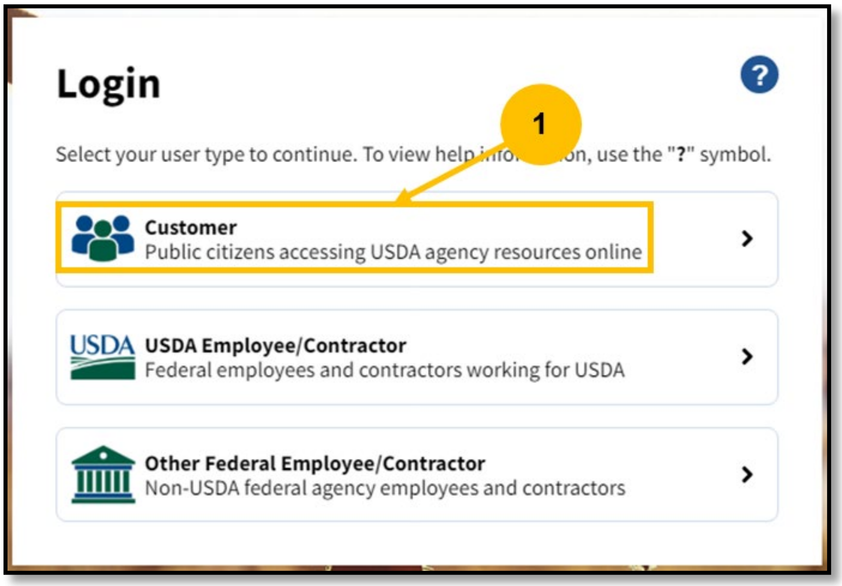
Now that you have completed the registration process and your eAuthentication account is linked to your Login.gov account, please contact your Organizational Administrator to **request a role** if needed.

New users should continue to the next section on Identity Verification.

IDENTITY VERIFICATION: LOGIN.GOV

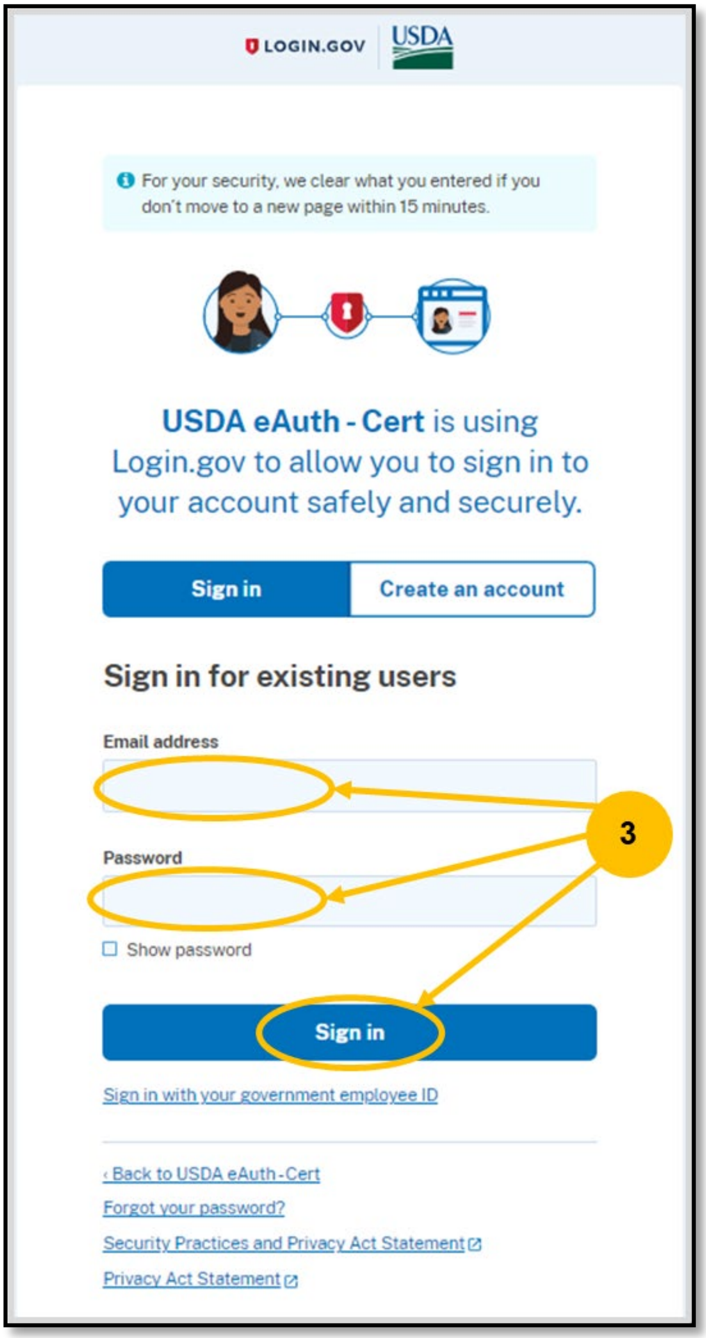
For new users, upon first login you may be prompted to verify your identity.

1. Navigate to https://nrs.nifa.usda.gov/. If the "Select your user type to continue" page displays, select **Customer**.

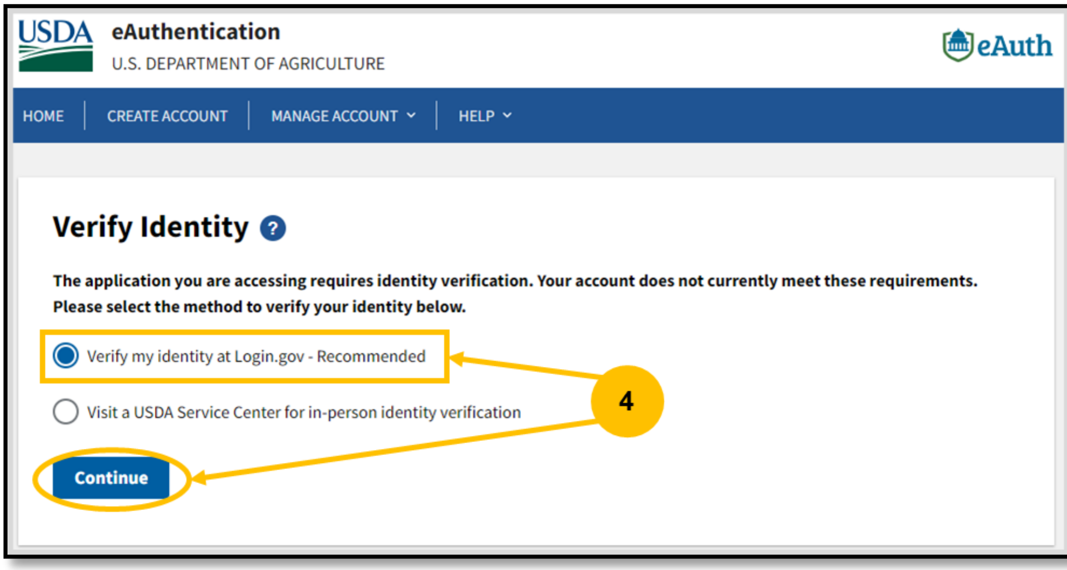


2. Customer Login page displays, select **Login.gov**.

3. USDA eAuthentication page displays, input your **Email address** and **Password**, select **Sign in**.



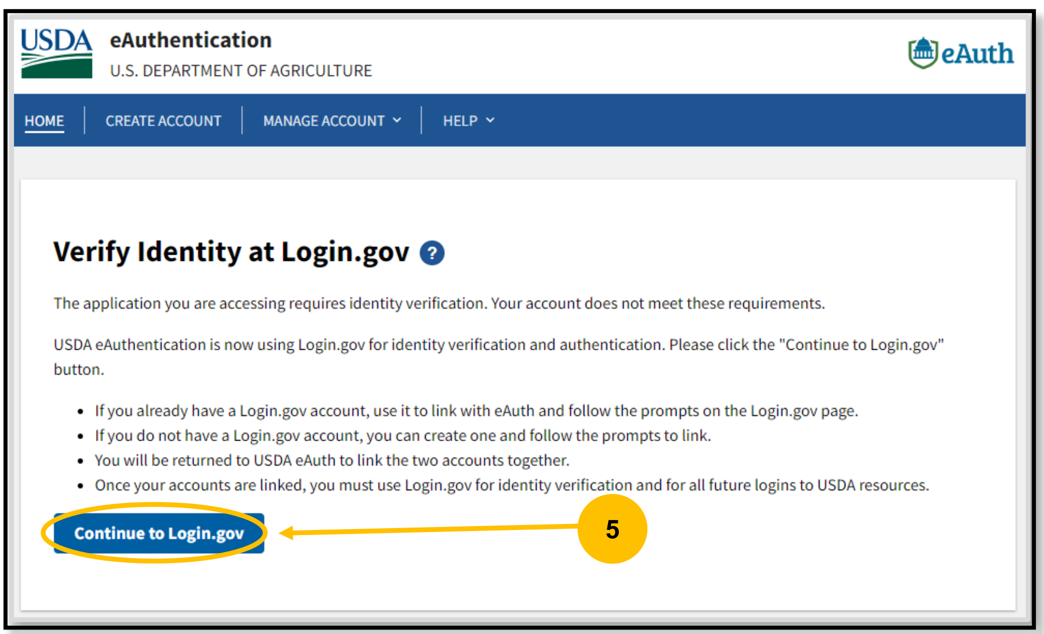
4. The Verify Identity page may display, select **Verify my identity at Login.gov – Recommended**, select **Continue**.



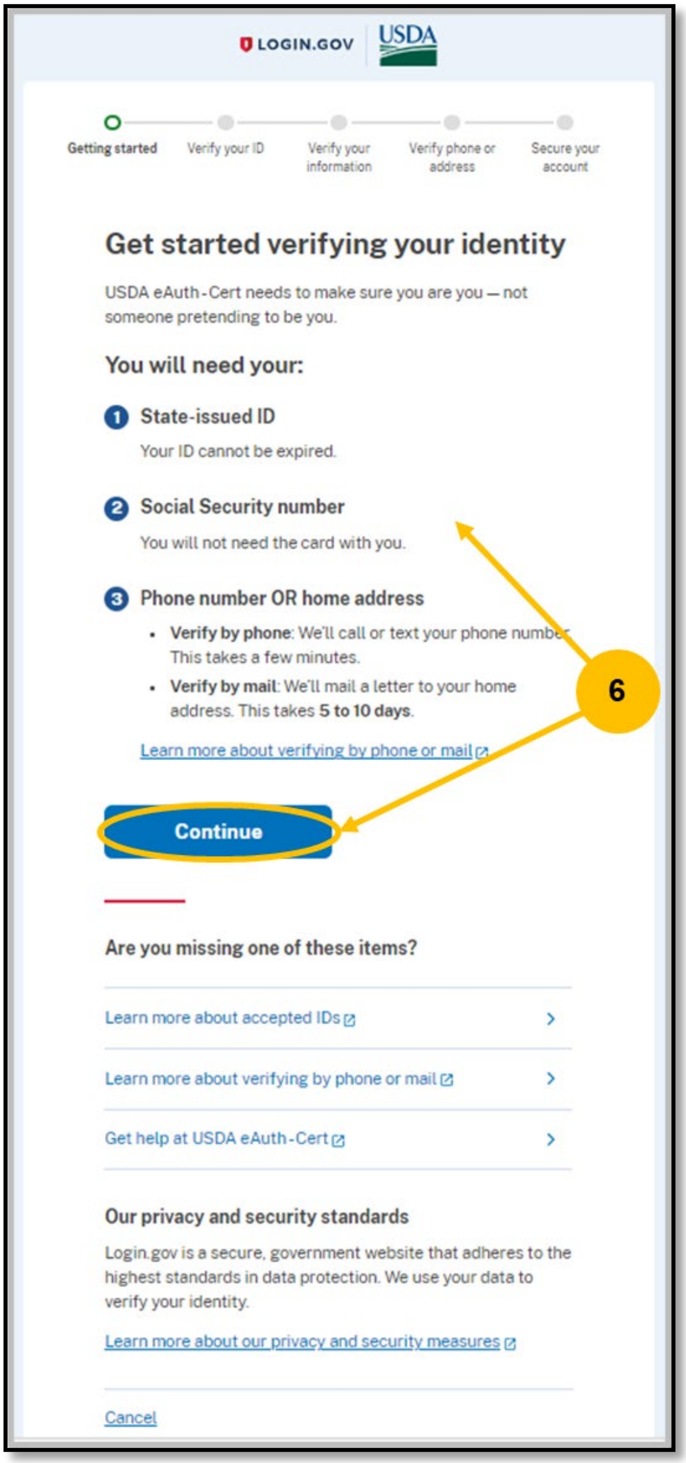
Online Identity Verification requires you to have a state-issued ID, social security number and your phone number OR home address to complete the process.

In-Person Identity Verification requires you to complete information in the system and then visit a USDA Service Center to present your government-issued photo ID to a Local Registration Authority (LRA). The address on the photo ID used to verify your identity must match the address used when the account was registered (see the instructions in the next section).

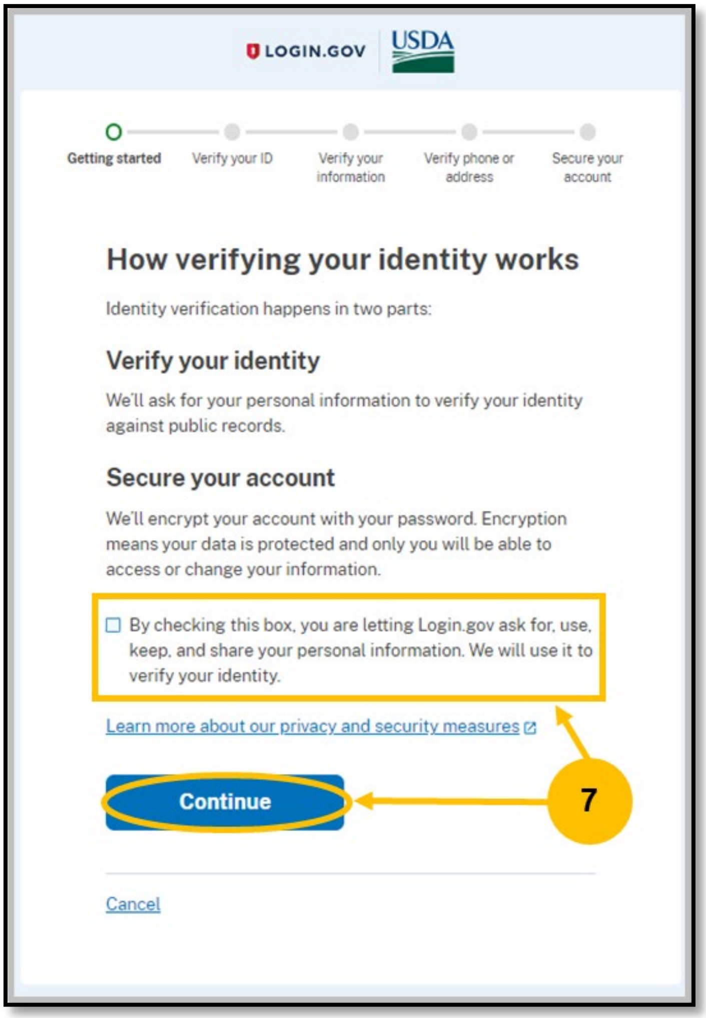
5. Verify Identity at Login.gov page displays, select **Continue to Login.gov**.



6. The Verify Identity page will display. Ensure you have your state-issued ID, Social Security number, and a phone number available for entry, then select **Continue**.

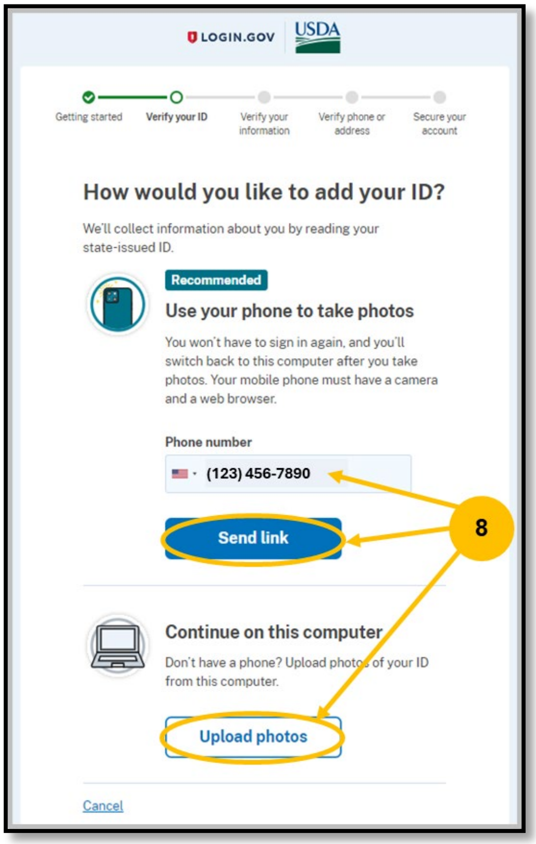


7. **Getting started:** Select the *"By checking this box…"* checkbox at the bottom, then select **Continue**.

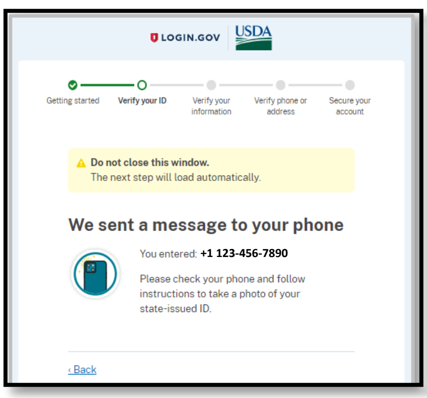


8. **Verify your ID:** In the *"Use your phone to take photos (recommended)"* section, input your phone number, then select **Send Link**.

   NOTE: If you do not have a phone, you can click the **Upload Photos** link to upload photos located on your computer.

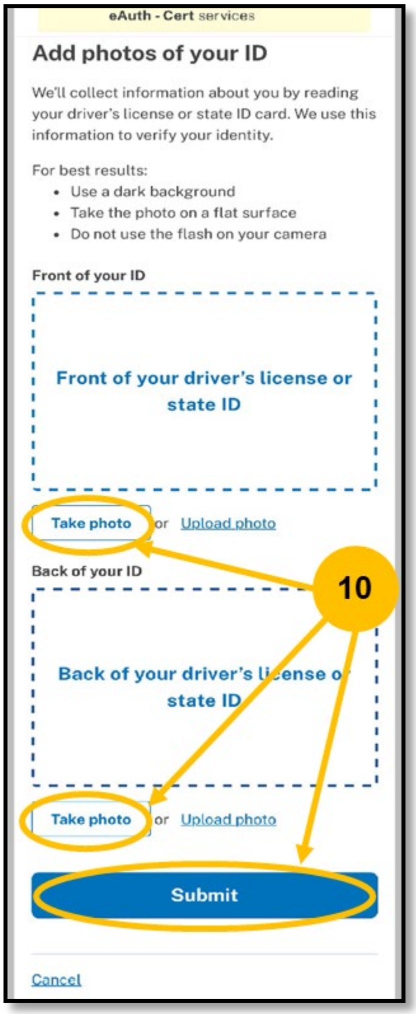


9. SMS Text message is sent to your phone. ***DO NOT CLOSE*** this window. It will automatically move to the next screen once you have completed the steps outlined in the SMS text message.

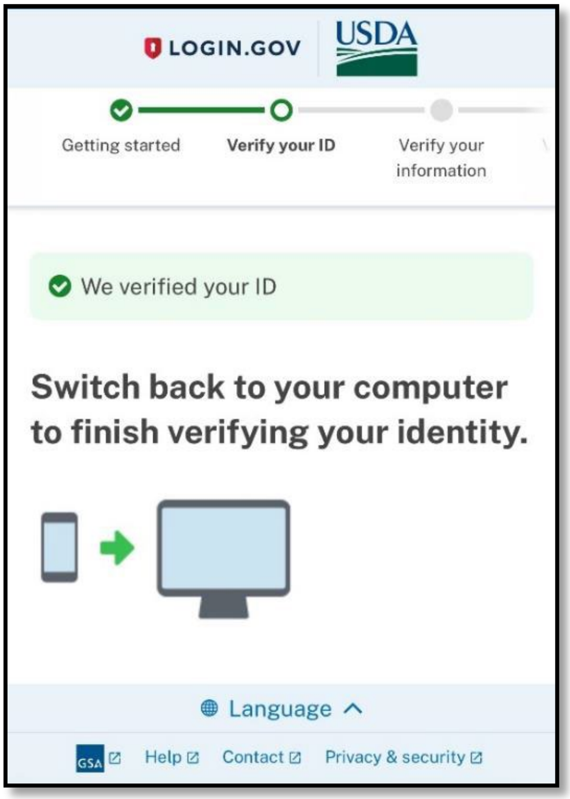


10. Select the link in the SMS text message sent to your phone. **Verify your ID**. Select **Take Photo** of the *Front of your ID* section then follow the directions to take the photo. Select **Take Photo** of the *Back of your ID* section then follow the directions to take the photo before selecting **Submit**.

    NOTE: If you already have a photo saved on your phone, you can select the **Upload Photo** link.

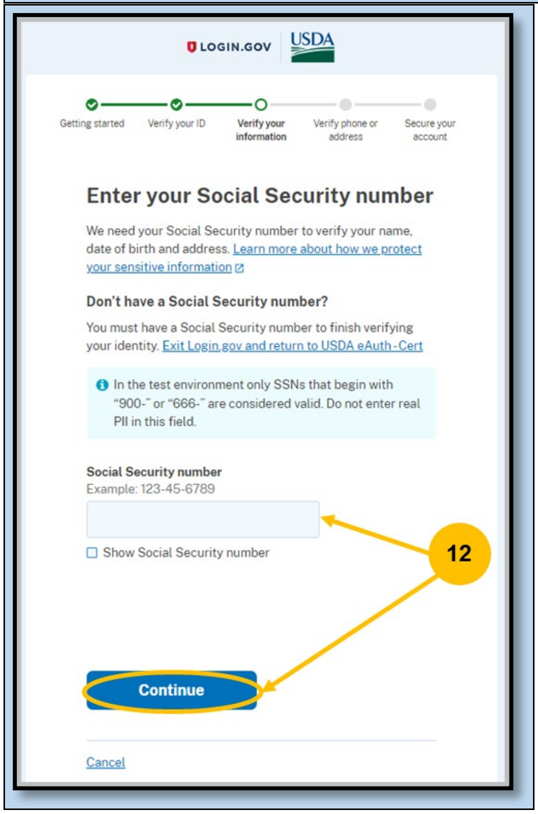


11. “We verified your ID” will display on the login screen. Switch back to your computer to continue verifying your identity.

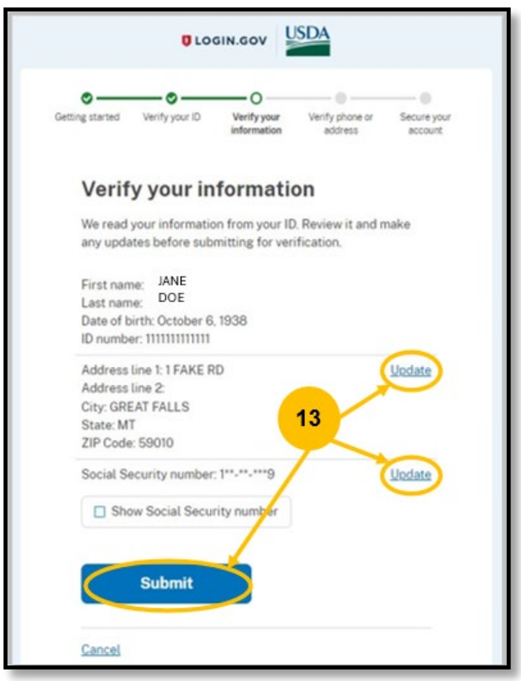


12. Enter your **Social Security number** then select **Continue**.

Please note: The verification service DOES NOT run a credit report or affect your credit score.

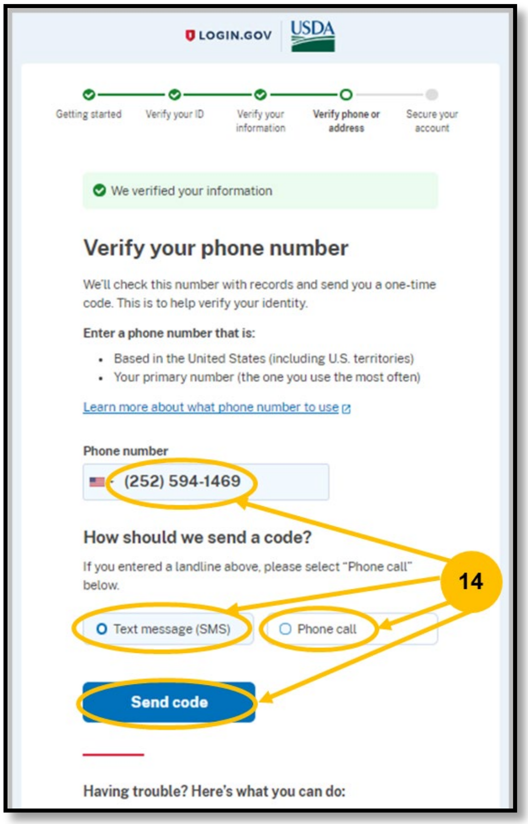


13. **Verify your information**. If you need to modify any information, select the **Update** link before submitting.

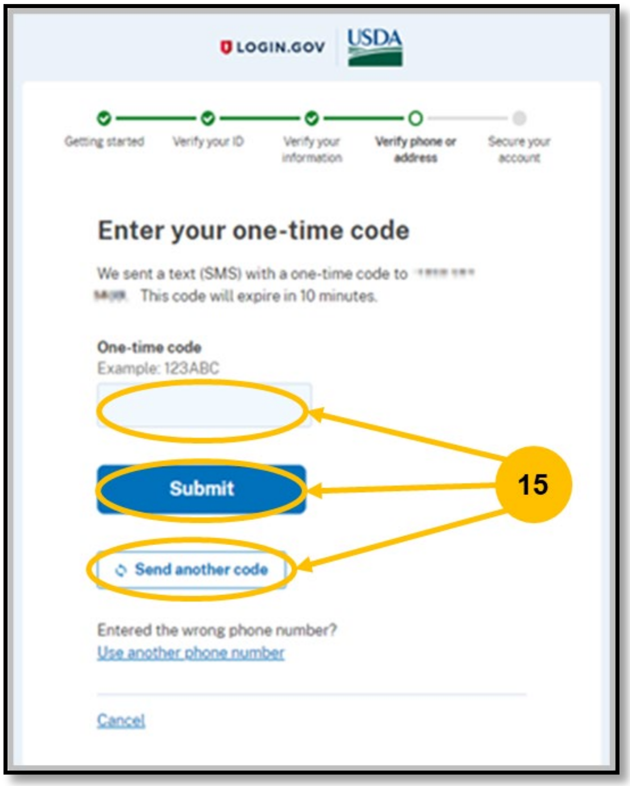


14. **Verify your phone number or address.** Input your phone number. Select **Text message (SMS)** (default) or **Phone Call** then select **Send Code**. A one-time code will be sent to your phone OR you will receive a phone

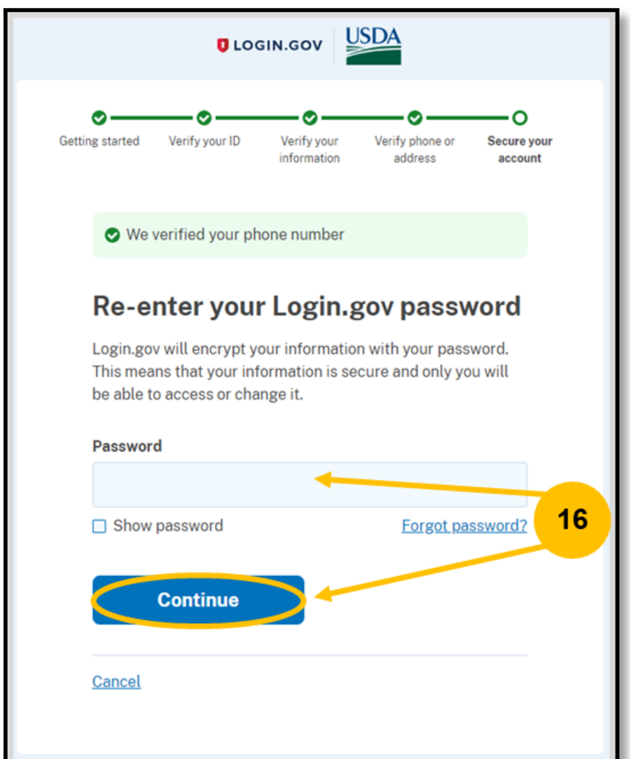
call with the code.



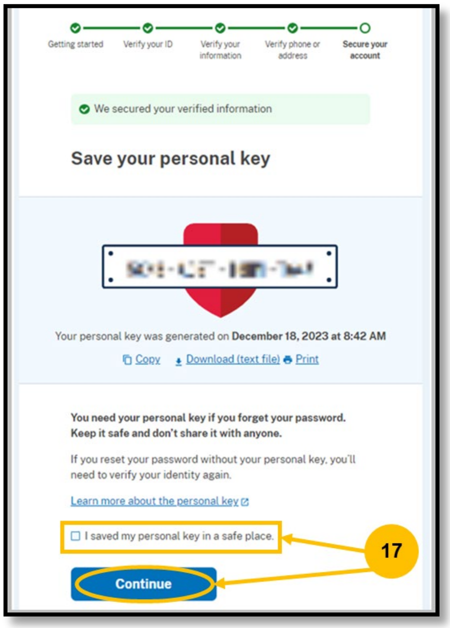
15. Enter the **One-time code** then select **Submit**. If you do not receive the code, select **Send another code**.



16. Secure your account by re-entering your **Password**, then select **Continue**.

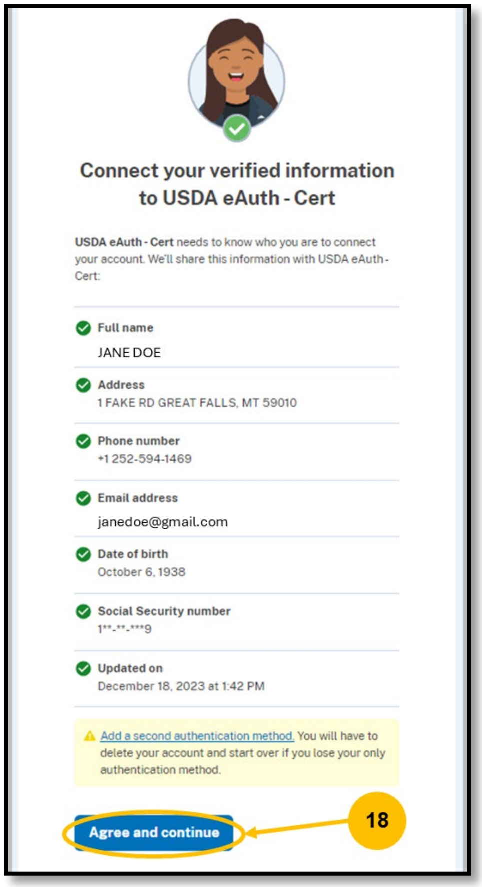


17. You will be presented with a personal key. Please make a note of this key in case you forget your password. Select the checkbox at the bottom *"I saved my personal…"*, then select **Continue**.

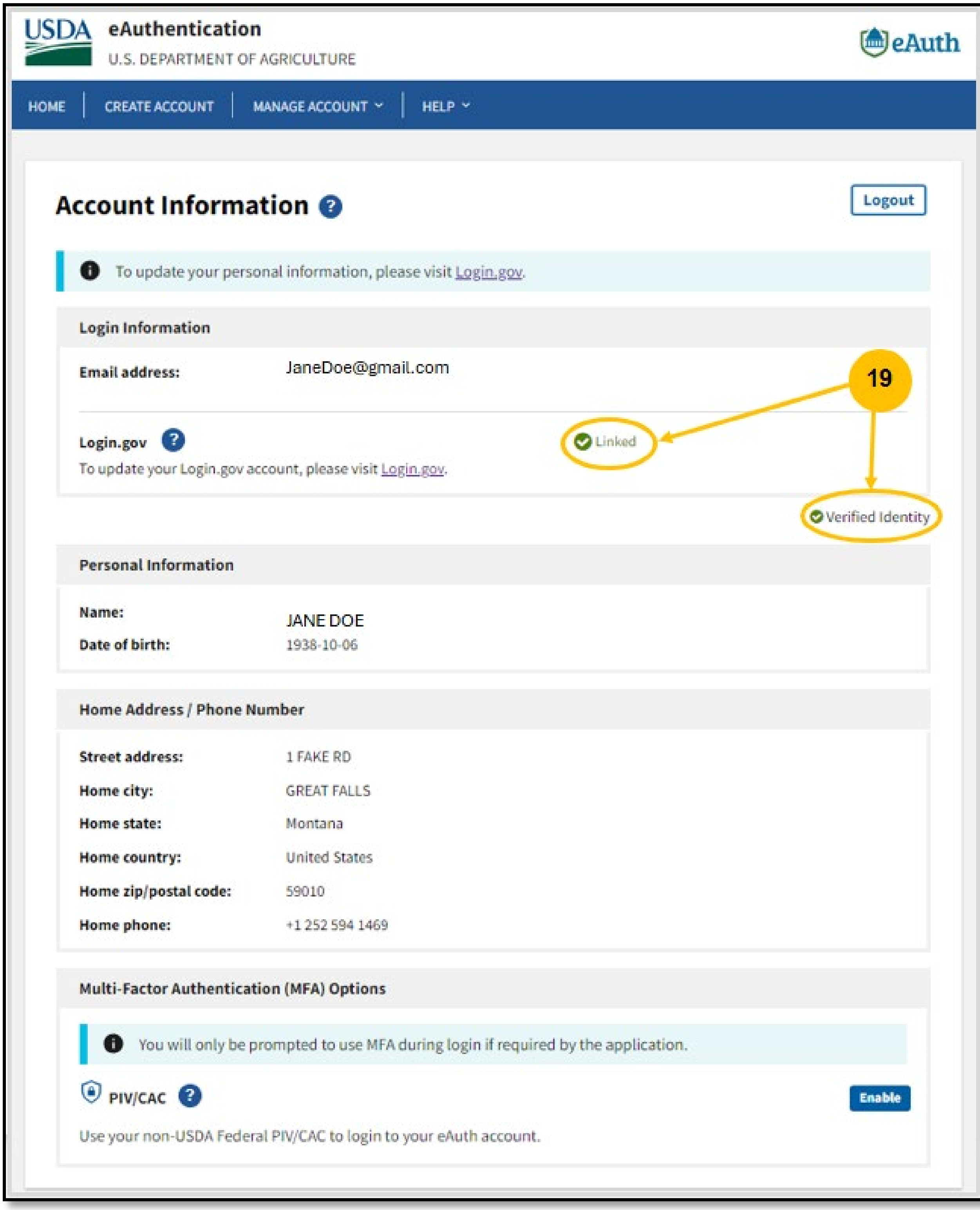


18. The **Connect your verified information to you USDA eAuth – Cert** page displays, select **Agree and continue**. NOTE: If only one authentication method was set up a message will display at the bottom of the

screen providing the option to add a second authentication method.



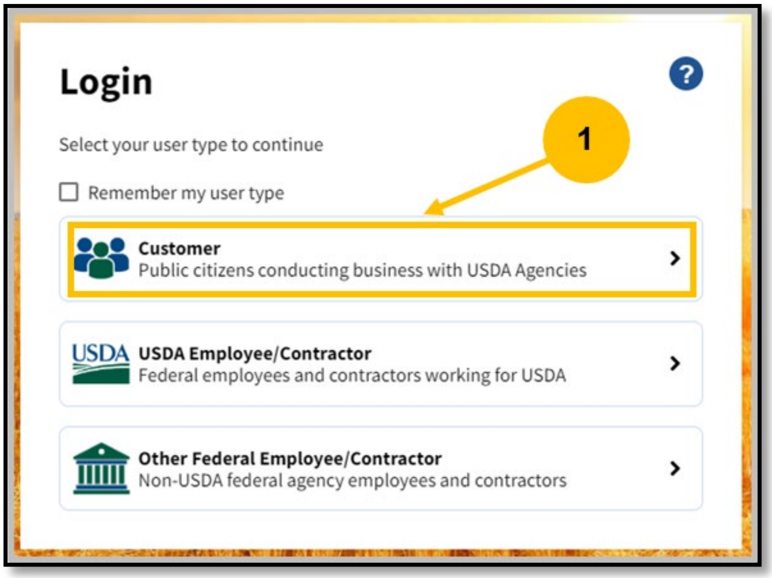
19. Identity verification complete. Account Information page is displayed with a next to **Linked** and **Verified Identity**. You will now be able to log into NRS if your email is a NRS user role.


USDA
eAuthentication
U.S. DEPARTMENT OF AGRICULTURE
eAuth
HOME
CREATE ACCOUNT
MANAGE ACCOUNT
HELP
Account Information
Logout
To update your personal information, please visit Login.gov.
Login Information
Email address:
JaneDoe@gmail.com
19
Login.gov
To update your Login.gov account, please visit Login.gov.
Linked
Verified Identity
Personal Information
Name:
JANE DOE
Date of birth:
1938-10-06
Home Address / Phone Number
Street address:
1 FAKE RD
Home city:
GREAT FALLS
Home state:
Montana
Home country:
United States
Home zip/postal code:
59010
Home phone:
+1 252 594 1469
Multi-Factor Authentication (MFA) Options
You will only be prompted to use MFA during login if required by the application.
PIV/CAC
Enable
Use your non-USDA Federal PIV/CAC to login to your eAuth account.

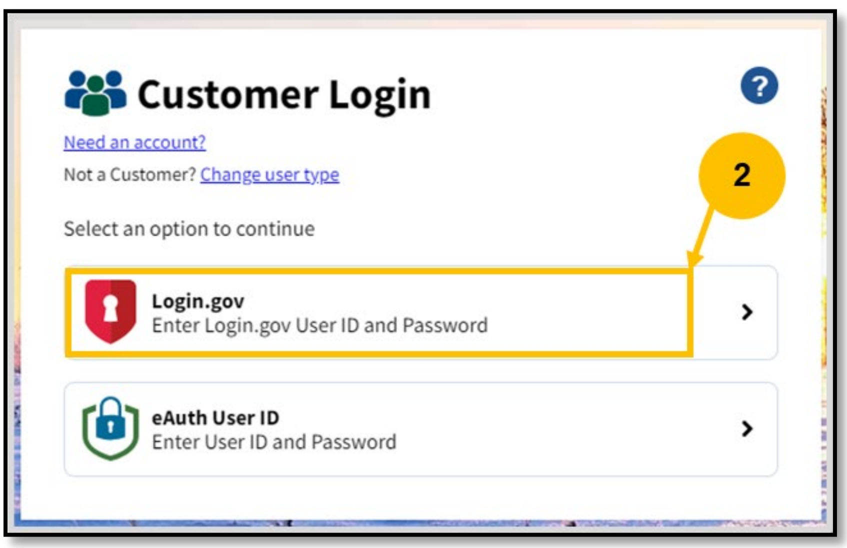
IDENTITY VERIFICATION: USDA SERVICE CENTER

If you are unable to complete identity verification through the Login.gov method above, the alternative is visiting a USDA Service Center. Prior to going to a USDA Service Center certain steps will need to be completed as described below. In-Person Identity Verification requires you to visit a USDA Service Center and present your government-issued photo ID to a Local Registration Authority (LRA). The address on the photo ID used to verify your identity must match the address used when the account was registered.

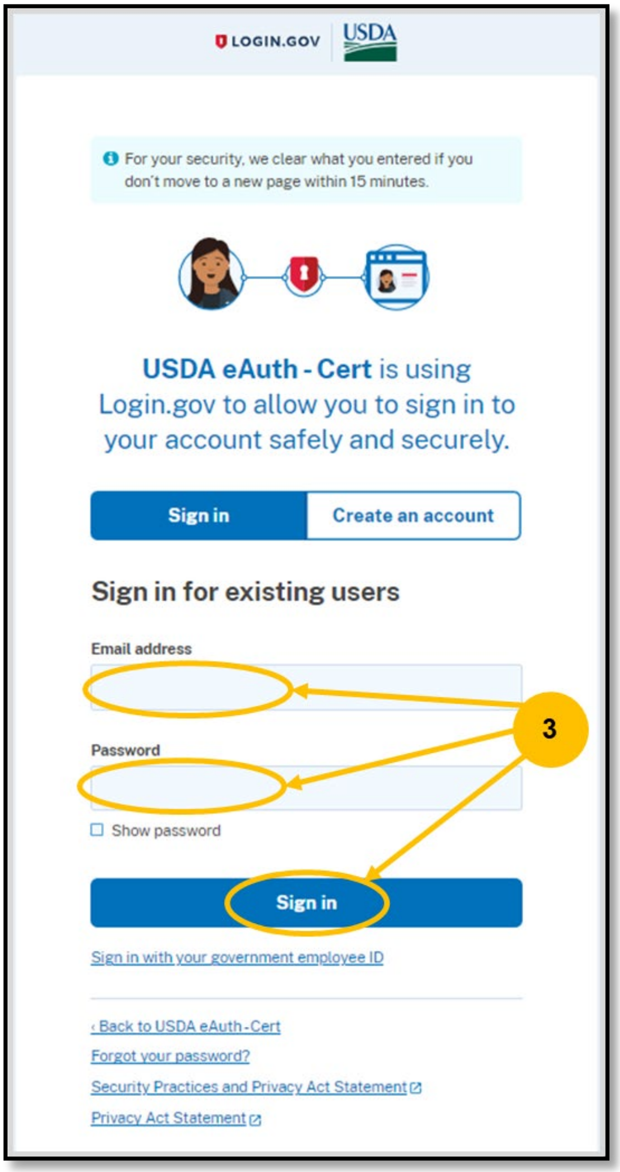
1. Navigate to https://nrs.nifa.usda.gov/. If the Select your user type to continue page displays, select **Customer**.



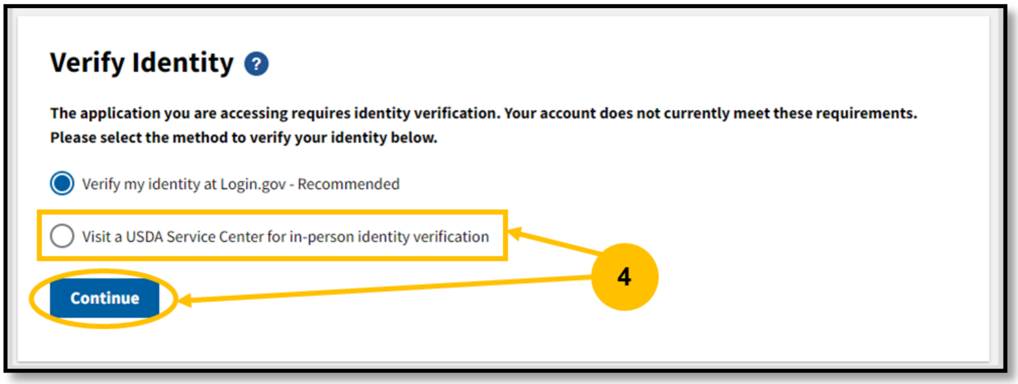
2. Customer Login page displays, select **Login.gov**.



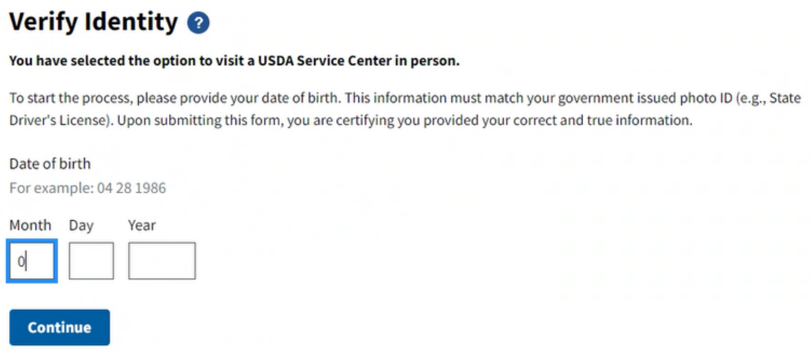
3. USDA eAuthentication page displays, input your **Email address** and **Password**, select **Sign in**.

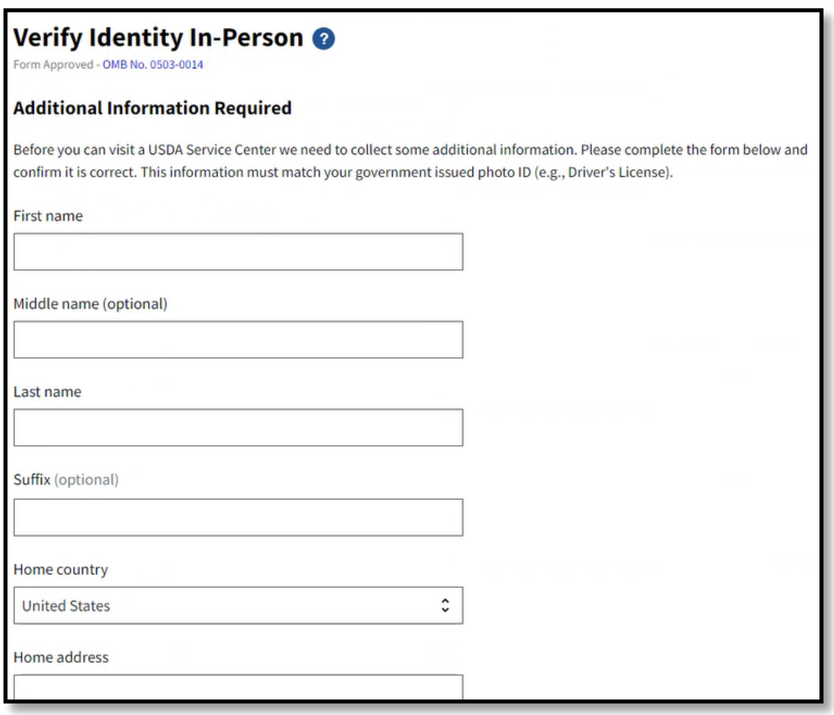


4. The Verify Identity page may display, select **Visit a USDA Service Center for in-person identity verification**, select **Continue**.

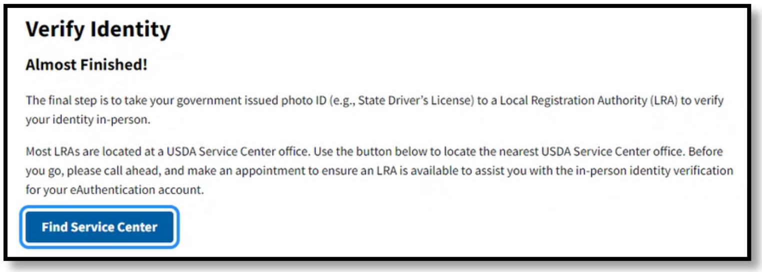


5. You will be prompted to fill out information such as Date of Birth and Address. You must fill that information out or a Local Registration Authority (LRA) will not be able to assist during an appointment.

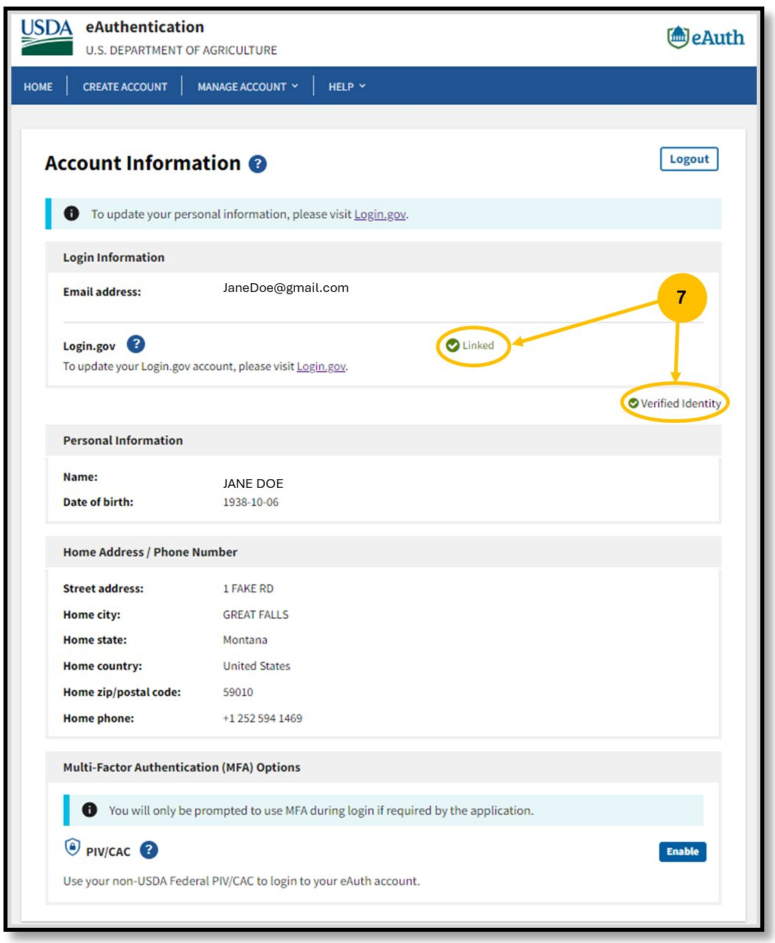




6. Once the request information is submitted, you will be directed to find a USDA Service Center office and make an appointment for an in-person visit. Please remember to bring your government issued photo identification showing your date of birth and address. If you have trouble finding a Local Registration Authority from the list to make an appointment, email the NRS Help Desk (nrs@usda.gov) for assistance. ***Please note, it can take up to 2 hours for before your updates will be available in the LRA system for them to view and verify your identity.***

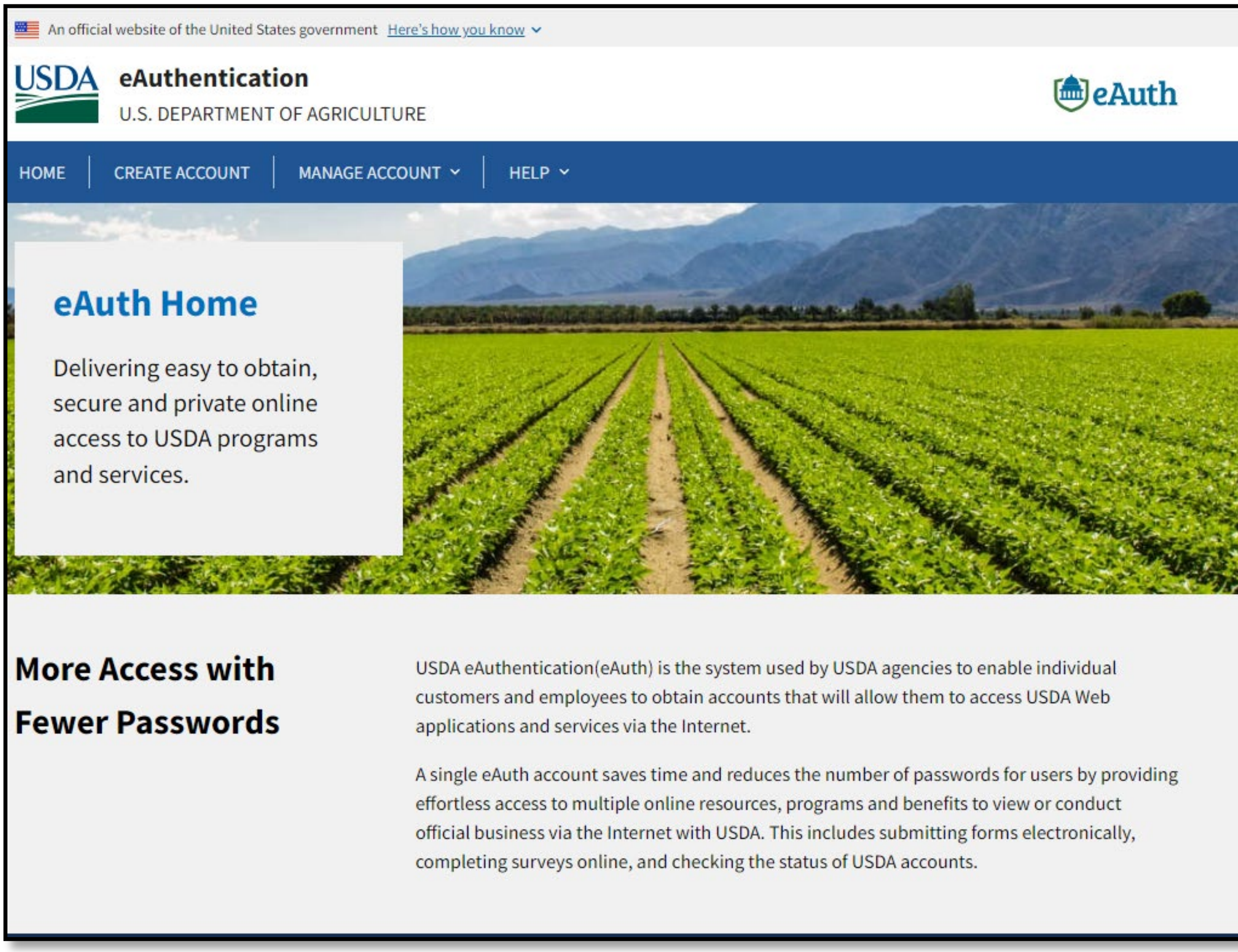


7. After your identity verification is completed at your appointment with the LRA, your eAuth Account Information page will have a ✅ next to **Linked** and **Verified Identity**. You will now be able to log into NRS if your email is tied to a NRS user role.

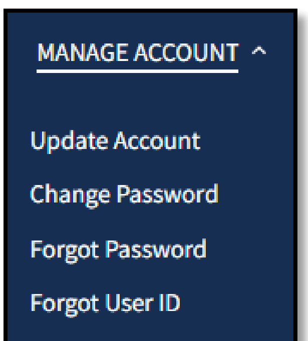


Updating Account Information

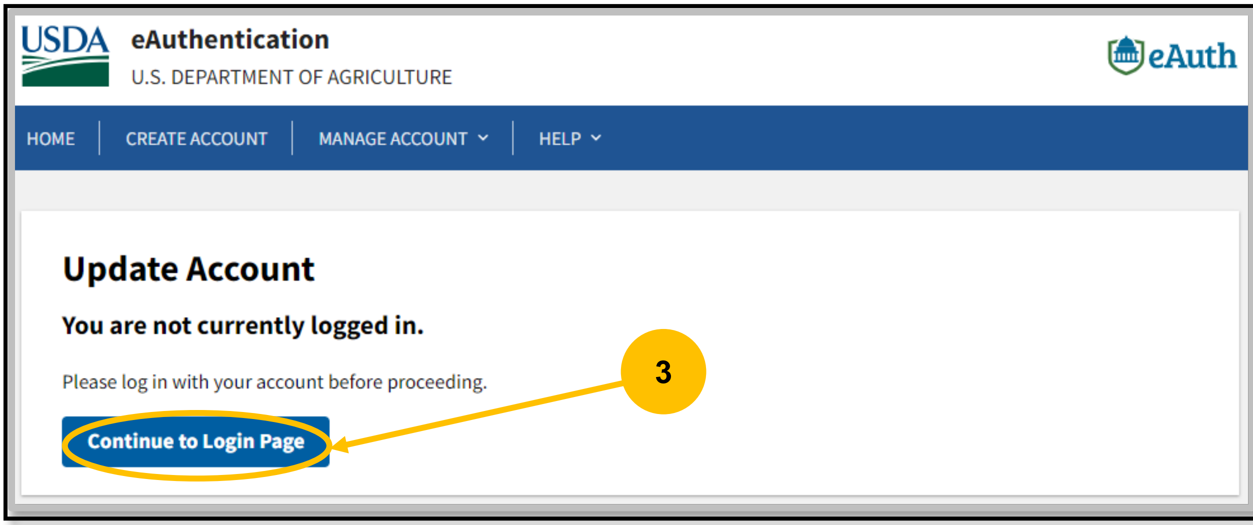
1. Navigate to https://www.eauth.usda.gov/home.



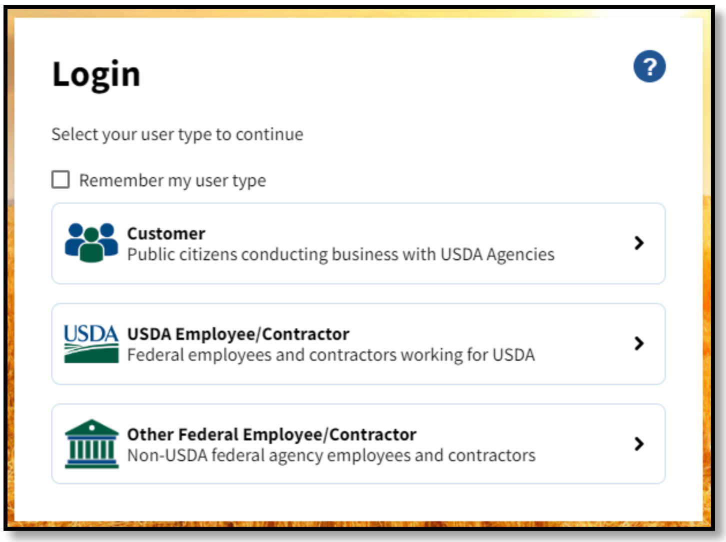
2. Select **Manage Account** > **Update Account**.



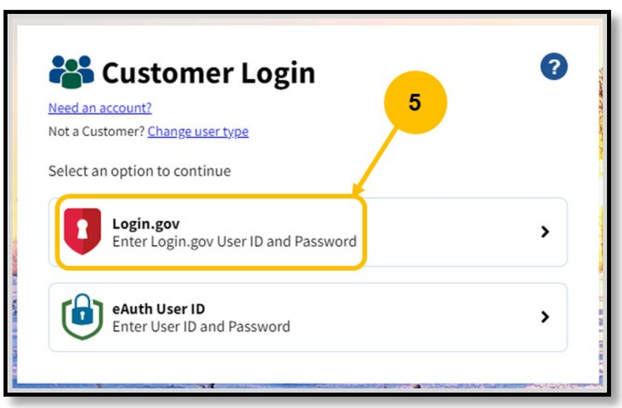
3. If not already logged in, you will be prompted to **Continue to the Login Page**.



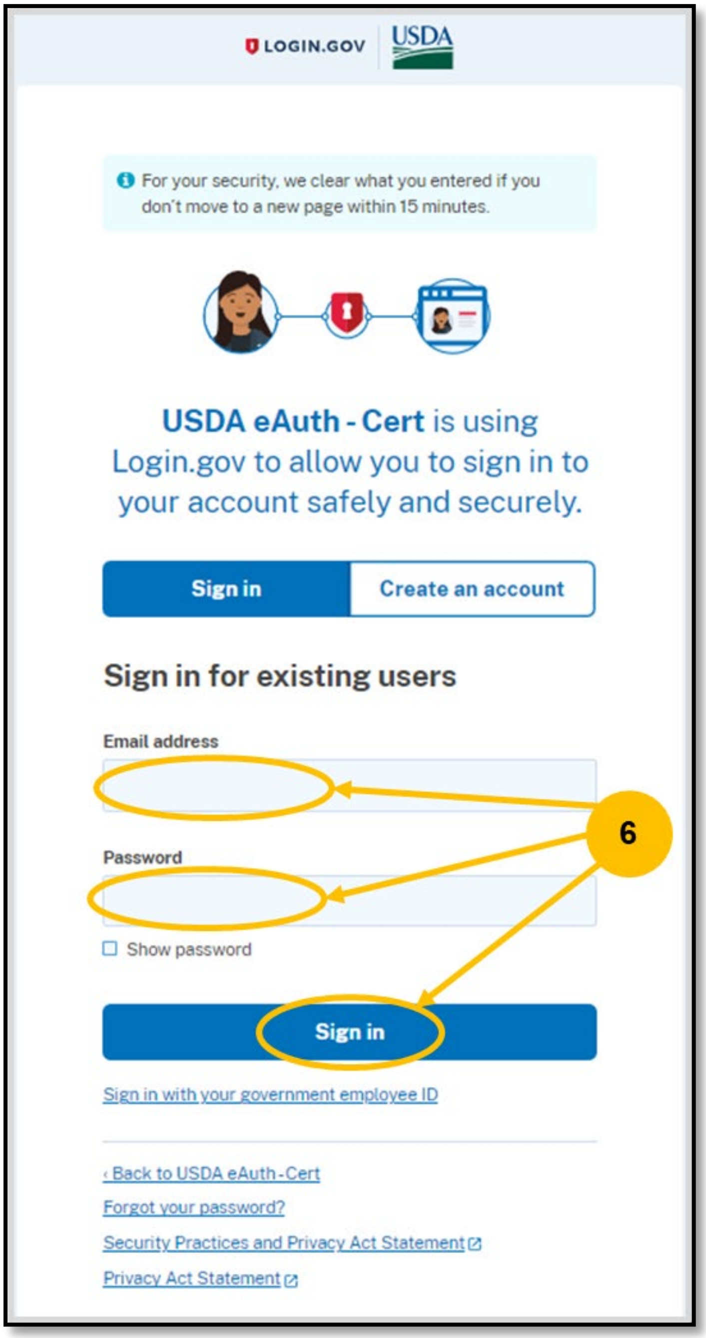
4. If prompted, select your customer type.



5. Select Login.gov.

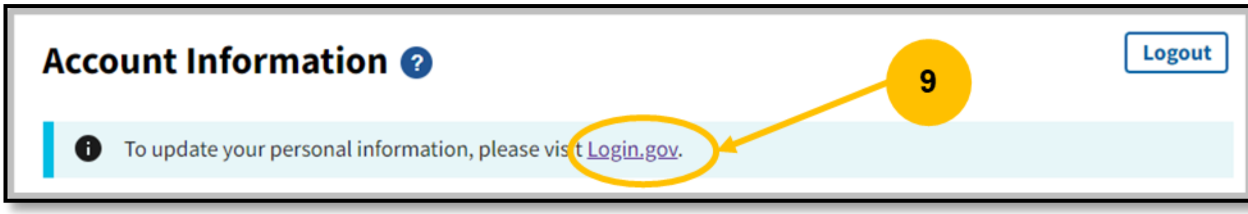


6. Enter **Email address** and **Password**, then select **Sign In**.

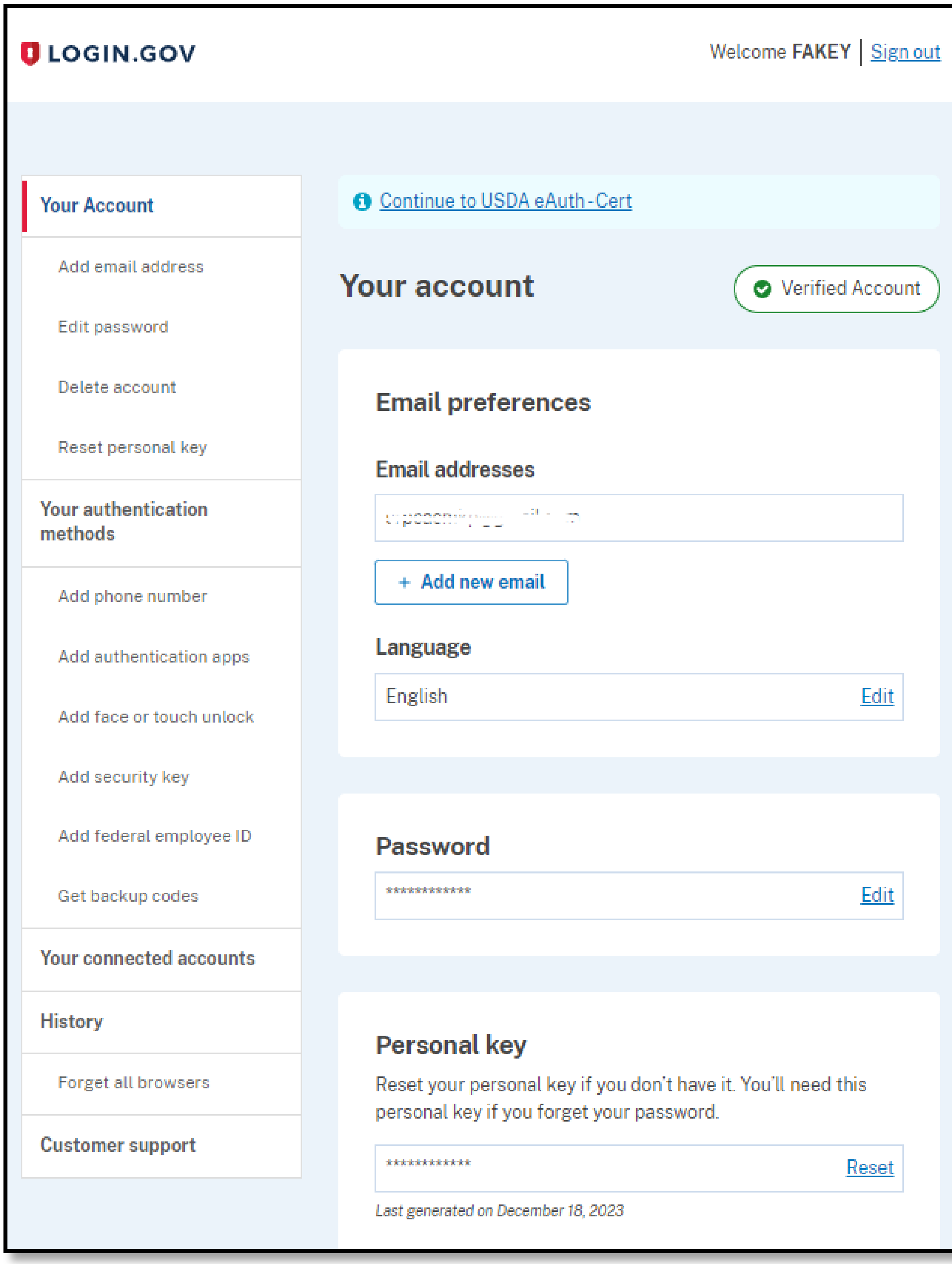


7. If multi-factor authentication was set up, follow the onscreen prompts.
8. eAuth account Information page will be displayed.

9. To update account information, you must log into Login.gov. Select the **Login.gov** link.



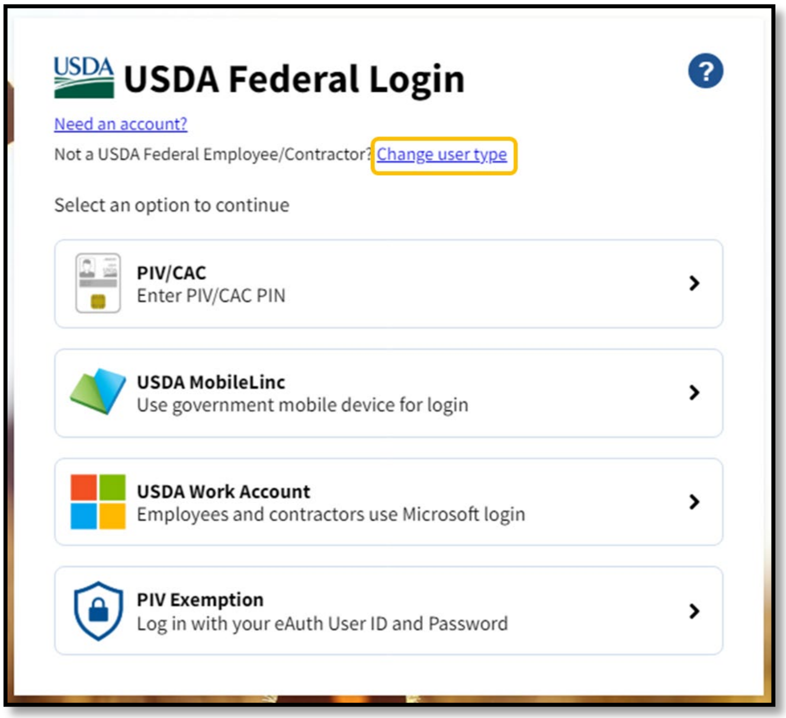
10. Login.gov account information page is displayed.



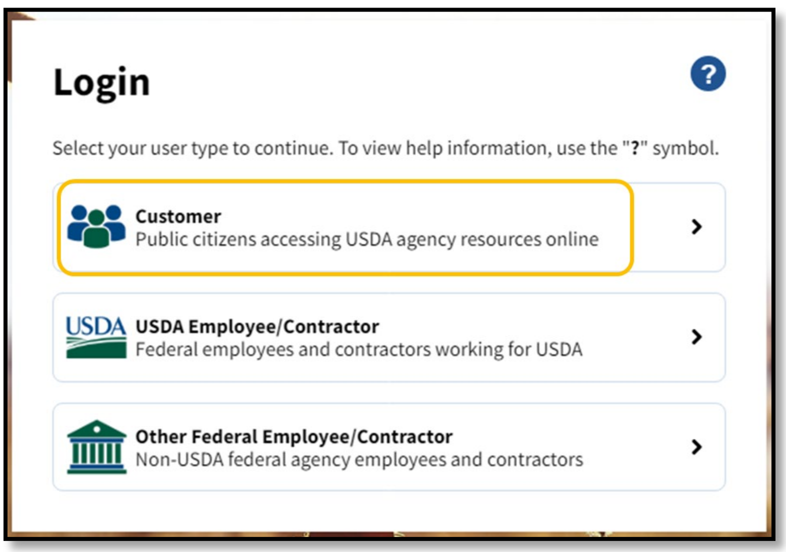
11. Update sections as required, following the onscreen prompts.

Wrong Login Type: Switch from Federal Login to Customer

1. If you accidentally selected USDA Federal Employee or Contractor, just click on “Change user type” to go back.



2. Click on “Customer”. After that you should be able to select Login.gov to enter in your email/password or use an eAuth user/password to login.



eAuthentication & Login.gov Resources

- eAuthentication Account Help:
  - Visit https://www.eauth.usda.gov/home, then click "Help" (FAQs, contacts, etc.)
  - Call 1-800-457-3642 select option 1, then select option 4
  - Email eAuthHelpDesk@ftc.usda.gov
- NRS Help Desk assistance for eAuth and Login.gov issues:
  - Email nrs@usda.gov