eRA- ORCID & SciENcv

Michelle Bulls, Director, NIH OPERA
Shawna Sadler, ORCID
Bart Trawick, NCBI-NLM @ NIH

FDP Meeting – May 2020
Michelle Bulls, Director
Office of Policy for Extramural Research Administration (OPERA)
Shawna Sadler

Shawna Sadler is the Engagement Manager, Outreach & Partnerships, responsible for overseeing ORCID's global strategic relations and outreach initiatives. Shawna has a background in academic digital librarianship and has worked with research organizations in the US, Canada and Australia.
Dr. Bart Trawick has worked at the National Center for Biotechnology Information (NCBI)/National Library of Medicine (NLM) since 2000. He currently leads the Customer Services Division at NCBI, which works to ensure NCBI products meet the needs of researchers and other customers. He also manages My NCBI, which includes the tools SciENcv and My Bibliography. Researchers can use SciENcv to leverage existing data in federal systems and/or ORCID to quickly fill out a biosketch in a variety of agency formats for grant application packages. SciENcv currently supports biosketches formats for the NIH, NSF, and the Department of Education.
Questions

All feedback, comments, questions, please contact Ron Splittgerber, Director, Research Services, Colorado State University: ron.splittgerber@colostate.edu
Upcoming Changes to the Biographical Sketch and Other Support Format Page

NIH OFFICE OF POLICY FOR EXTRAMURAL RESEARCH ADMINISTRATION

FDP MAY 2021, MICHELLE BULLS

National Institutes of Health
Office of Extramural Research
Overview

• Recap – form and instructions updates
• What’s next? SciENcv
• Discussion/Feedback
FORM AND INSTRUCTION UPDATES
Biosketch Format Updates

- Biosketch Form & Instructions:
  - Updated title of Section B to capture all scientific appointments (all positions and scientific appointments, foreign and domestic)
  - Removed Section D: Research Support, which duplicates information provided in Other Support
    
    Note: Scholastic Performance will remain in Section D for fellowship Biosketch
  
- Page limit has not changed (5 pages)
  
  - Active positions and appointments required. Previous positions and appointments are optional, if the individual chooses to highlight them
Other Support Format Updates

• Updated form and instructions provide more structured format

• Supporting documentation: supporting documentation, which includes copies of contracts, grants or any other agreement specific to senior/key personnel foreign appointments and/or employment with a foreign institution for all foreign activities and resources that are reported in Other Support. If the contracts, grants or other agreements are not in English, recipients must provide translated copies.

• Immediate notification of undisclosed Other Support: When a recipient organization discovers that a PI or other Senior/Key personnel on an active NIH grant failed to disclose Other Support information outside of Just-in-Time or the RPPR, as applicable, the recipient must submit updated Other Support to the Grants Management Specialist named in the Notice of Award as soon as it becomes known.

• PI or other senior/key personnel will electronically sign submissions to certify accuracy of the information provided
Implementation of Changes to the Biographical Sketch and Other Support Format Page

- NIH expects applicants and recipients to use the updated Biosketch and Other Support format for applications, Just-in-Time (JIT) Reports, and Research Performance Progress Reports (RPPRs) as of May 25, 2021.

- NIH will require the use of the updated format pages on and after January 25, 2022.
  - Electronic signatures and supporting documentation will be required beginning January 25, 2022.
  - Failure to follow the appropriate formats on or after January 25, 2022, may cause NIH to withdraw applications from or delay consideration of funding.

- Applicants and recipients remain responsible for disclosing all research endeavors regardless of the version of the forms used.

Learn more: NOT-OD-21-110
Electronic Signature Considerations

- Other Support submissions at Just-in-Time and in the RPPR must be submitted as a flattened PDF, after all signatures are obtained.

- Recipients and applicants may use the digital signature software of their choice, and in accordance with their institutional policies.

- Applicants and recipients must maintain supporting documentation to reasonably authenticate that the appropriate individual signed the submission and make it available upon request.
WHAT'S NEXT?
SciENcv

• Updated SciENcv Biosketch template is available!

• NIH is collaborating with SciENcv on a template for Other Support
  • Use of SciENcv will NOT be required

• Feedback/suggestions we have received so far:
  • Explore ways to electronically sign Other Support using eRA Commons and/or SciENcv
  • Using ORCID to populate information
  • Flexibility to continue using word templates
  • Don’t set character limits on the Other Support template fields
DISCUSSION
Other Support and Biosketch Questions?

• Send inquiries related to changes to the biographical sketch and other support templates to nihosbiosketch@nih.gov.

• NIH is diligently working to ensure complete and timely responses to inquiries received to date via existing email inboxes. The research community may elect to forward inquiries that are pending a response to the new central email inbox, as needed.

Learn more: NOT-OD-21-122 and FAQs
ORCID

Connecting Research & Researchers

Federal Demonstration Partnership May, 2021
Shawna Sadler

https://orcid.org/0000-0002-6103-5034

Engagement Manager, Outreach & Partnerships

s.sadler@orcid.org
Agenda

1. ORCID overview
2. How ORCID reduces administrative burden
3. Optimize data accuracy & timeliness
4. Techniques to get data into & out of ORCID records
5. Common systems to integrate ORCID
6. New initiatives
What is ORCID?
An non-profit organization that provides:

1. ORCID iDs to people
2. ORCID records for people
3. Infrastructure to share research data between organizations
ORCID for Researchers
Sofia Maria Hernandez Garcia

https://orcid.org/0000-0001-5727-2427
### ORCID Record:

<table>
<thead>
<tr>
<th>Also known as</th>
<th>S. M. Garcia, Sofia Maria Garcia</th>
</tr>
</thead>
<tbody>
<tr>
<td>Websites &amp; Social Links</td>
<td>Faculty profile webpage @sofiangh</td>
</tr>
<tr>
<td>Country</td>
<td>United States</td>
</tr>
<tr>
<td>Other IDs</td>
<td>Profile system identifier: A-123456 ResearchID: L-8716-2018 eScientist: 0000-0001-5727-3427</td>
</tr>
<tr>
<td>Email</td>
<td><a href="mailto:s.garcia@orcid.org">s.garcia@orcid.org</a></td>
</tr>
</tbody>
</table>

### Funding (1)
- **Grant for ORCID**
  - **Wellcome Trust (London)**
  - **2014 to present**
  - **Grant**
  - Source: Sofia Maria Hernandez Garcia [Preferred source]

### Research resources (1 of 1)
- **Giant Laser Award**
  - **ORCID (Bethesda, Maryland, US)**
  - **1999-02-02 to 2012-02-02**
  - **SOURCE-WORK-ID: 123456**
  - **HANDLE: https://grants.net/123456**
  - Source: ORCID [Preferred source]
ORCID Record:

<table>
<thead>
<tr>
<th>Faculty profile webpage</th>
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<tbody>
<tr>
<td>@sofiamhrg</td>
<td></td>
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<table>
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<tr>
<th>Country</th>
<th>United States</th>
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<table>
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<tr>
<th>Other IDs</th>
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</thead>
<tbody>
<tr>
<td>Profile system identifier: A-123456</td>
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<tr>
<td>ResearchID: L-8716-2018</td>
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<tr>
<td>eScientist: 0000-0001-5727-2427</td>
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</table>

<table>
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<th>Email</th>
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<tbody>
<tr>
<td><a href="mailto:s.garcia@orcid.org">s.garcia@orcid.org</a></td>
</tr>
</tbody>
</table>

### Works (3 of 3)

1. **CASRAI and ORCID: Putting the Pieces together to Collaboratively Support the Research Community**
   - Procedia Computer Science
   - 2014 | journal-article
   - DOI: 10.1016/j.procs.2014.06.045
   - Part of ISSN: 1877-0509
   - Source: Sofia Maria Hernandez Garcia via Crossref Metadata Search

2. **ORCID Annual Public Data File, 2013**
   - 2013 | data-set
   - DOI: 10.14454/07243.2013.001
   - Source: DataCite

3. **ORCID: a system to uniquely identify researchers**
   - Learned Publishing
   - 2012-10-01 | journal-article
   - DOI: 10.1087/20120404
   - Part of ISSN: 0953-1513
   - Source: Sofia Maria Hernandez Garcia via Crossref Metadata Search
A Quick Tour of the ORCID Record
ORCID for Universities
Li Wei, Research Administrator

https://orcid.org/0000-0001-5727-8989
University Research Management System(s)
1) Registers for an ORCID iD
2) Populates record

All records are saved in the ORCID Registry

API transfer researcher data to your systems
API Technology to Transfer Data

ORCID Registry

ORCID API

University Research Management System(s)
ORCID Reducing Burden and Improving Transparency
Adam from IT

How do we build this?
API Technology to Transfer Data

ORCID Registry

ORCID API

University Research Management System(s)
ORCID has 4 APIs

- **Sandbox ORCID API**: Testing
- **Public (free) ORCID API**: Read/Pull
- **Member (Basic) ORCID API**: Read/Pull
- **Member (Premium) ORCID API**: Read/Pull, Write/Push, Faster & Monthly Reports
ORCID, Inc
http://www.orcid.org

Pinned repositories

- **ORCID-Source**
  ORCID Open Source Project
  - Java
  - 239 stars
  - 98 forks

- **orcid-api-tutorial**
  MkDocs version of ORCID API workshop materials
  - HTML
  - 11 stars
  - 8 forks

- **orcid-angular**
  Angular UI for ORCID
  - TypeScript
  - 5 stars
  - 6 forks

- **orcid-model**
  Container for all classes that will be used to marshal and unmarshal XML/JSON from the API
  - Java
  - 10 stars
  - 13 forks
What can ORCID do?

Authenticate  Display  Collect  Connect  Update
**ORCID-enabled Systems**

https://info.orcid.org/orcid-enabled-systems

**35 Systems**

**ORCID also supports custom system integrations**

<table>
<thead>
<tr>
<th>Organization: System Name</th>
<th>Category</th>
<th>Certified Service Provider</th>
<th>Can Use with Public API</th>
<th>Collect Authenticated IDs</th>
<th>Read from Records</th>
<th>Add Affiliations</th>
<th>Add works</th>
<th>Add Funding</th>
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<tr>
<td>Royal Society Te Apārangi NZ ORCID Hub</td>
<td>Association</td>
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</table>
ORCID data to populate a NIH Biosketch

<table>
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<th></th>
<th>iD</th>
<th>NIH Biosketch</th>
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</thead>
<tbody>
<tr>
<td>1.</td>
<td>Biography</td>
<td>Personal Statement</td>
</tr>
<tr>
<td>2.</td>
<td>Employment</td>
<td>Positions and Honors</td>
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<tr>
<td>3.</td>
<td>Education</td>
<td>Education/Training</td>
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<tr>
<td>4.</td>
<td>Works</td>
<td>Citations &amp; Contribution to Science</td>
</tr>
<tr>
<td>5.</td>
<td>Funding</td>
<td>Additional Information: Research Support and Scholastic Performance</td>
</tr>
</tbody>
</table>
Affiliation Manager tool

- Consortium members, write to ORCID records
- Employment, Education, Qualification, Invited-Position, Distinction and Service

**Individual entry**

**Bulk upload (csv file)**
Freely available tools to enter data in ORCID Records

1. Trusted Individual (free)
   ○ Researcher can assign someone as a Trusted Individual to write/edit their ORCID record

2. Search & Link Tools
   ○ DOE, Scopus, The Lens, MLA, Crossref...

3. Use an identifier like DOI

4. Upload data with Bibtex file
New ORCID Initiatives

1. Research Data Management Plan (or DMPs) citations in ORCID records

2. Funded-by relationship for scholarly works

3. CRedit Taxonomy
   ○ Give credit to everyone who worked on the research, not just the authors or PIs
   ○ 14 contribution types to scholarly work
      Conceptualization, Methodology, Software, Validation, Formal analysis, Investigation, Resources, Data curation, Writing – original draft, Writing – review & editing, Visualization, Supervision, Project administration, Funding acquisition
New Crossref Initiative

Grant DOIs

Full support for grant identifier registration and dissemination at Crossref will be rolled out over the next few months.

Schema supports ORCID, ROR and aims to streamline reporting workflows for funders, researchers and research offices.

https://www.crossref.org/community/grants/
Two ORCID Consortia for membership

**US Federal Agencies (Universities)**

- US Government ORCID Consortium
- U.S. Department of Energy Office of Scientific and Technical Information
- $7,500
- ORCIDconsortium@osti.gov

**US Non-profits**

- LYRASIS
- $4,800/year
- orcidus@lyrasis.org
Benefits of ORCID

1. Reduced administrative burden
2. Populate data in researcher’s records for them
3. Plug your system into this infrastructure to enable auto updates
SciENcv Update
Federal Demonstration Partnership, 26 May 2021
Bart Trawick, PhD
SciENcv = Science Experts Network Curriculum Vitae

Use your data from multiple systems to support funding applications, reporting, and collaboration with less burden and complexity

Current Features
- NIH biosketches, NSF biosketch, NSF Current and Pending Support, Dept. of Ed. IES biosketch
- Integration with ORCID, Fastlane, PubMed/PMC, and eRA Commons

Reduce dependency on agency administrative guidelines

NIH SF424 Application guide, 310 pages

NSF Proposal and Award Policies and Procedures Guide, 185 pages
Applicants can use existing agency accounts

Applicants can use **multiple** agency accounts.
Applicants can use *multiple* agency accounts.
Local NCBI authentication to be phased out in 2021-2
Local NCBI authentication to be phased out in 2021-2

<table>
<thead>
<tr>
<th>Current login method</th>
<th>What will happen in 2022</th>
<th>What to do</th>
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</thead>
<tbody>
<tr>
<td>A</td>
<td></td>
<td>Add login method</td>
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<tr>
<td>NCBI Account</td>
<td></td>
<td></td>
</tr>
<tr>
<td>B</td>
<td></td>
<td></td>
</tr>
<tr>
<td>NCBI Account</td>
<td>Google Account</td>
<td></td>
</tr>
<tr>
<td>C</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Google Account</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

[https://ncbiinsights.ncbi.nlm.nih.gov/2021/01/05/important-changes-ncbi-accounts-2021/](https://ncbiinsights.ncbi.nlm.nih.gov/2021/01/05/important-changes-ncbi-accounts-2021/)
How to add an additional login method

1. Click on your username
2. Choose new method
3. Authenticate at 3rd party site

https://ncbiinsights.ncbi.nlm.nih.gov/2021/01/05/important-changes-ncbi-accounts-2021/
Applicants can leverage existing data
The power of linking data!
Support NIH Policy and Return On Investment

...ensure a continued high return on the public investment in research.
SciENcv Biosketch Forms

**NIH Biosketch**

- **Profile name:** Bert Trawick NIH Biosketch form
- **Profile type:** NIH BioSketch NIH Biographical Sketch Instructions (PDF)
- **Last Updated:** 30 November 2017
- **Sharing:** Public. Share via this URL: https://www.ncbi.nlm.nih.gov/

**EDUCATION/TRAINING**

<table>
<thead>
<tr>
<th>INSTITUTION AND LOCATION</th>
<th>DEGREE (if applicable)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Texas A&amp;M University, College Station, TX</td>
<td>BACHELOR OF</td>
</tr>
<tr>
<td>University of Texas Health Science Center at Houston, TX</td>
<td>MASTER OF SCI</td>
</tr>
<tr>
<td>University of Texas Health Science Center at Houston, TX</td>
<td>DOCTOR OF PHI</td>
</tr>
</tbody>
</table>

**NAME**

Trawick, Barton

**ORCID ID**

http://orcid.org/0000-0002-3635-3508

**A. PROFESSIONAL PREPARATION**

List undergraduate and graduate education and postdoctoral training. List the year the degree was received as well as inclusive dates of postdoctoral training.

<table>
<thead>
<tr>
<th>INSTITUTION</th>
<th>LOCATION</th>
<th>MAJOR/AREA OF STUDY</th>
<th>DEGREE (if applicable)</th>
<th>YEAR</th>
</tr>
</thead>
<tbody>
<tr>
<td>Texas A&amp;M University</td>
<td>College Station, TX, US</td>
<td>Chemistry</td>
<td></td>
<td>1992</td>
</tr>
<tr>
<td>University of Texas Health Science Center at Houston</td>
<td>Houston, TX, US</td>
<td>Biochemistry</td>
<td>MASTER OF SCIENCE</td>
<td>1996</td>
</tr>
<tr>
<td>University of Texas Health Science Center at Houston</td>
<td>Houston, TX, US</td>
<td>Immunology</td>
<td>DOCTOR OF PHILOPSY</td>
<td>2000</td>
</tr>
</tbody>
</table>

**NSF Biosketch**

- **Profile name:** NSF-orcid
- **Profile type:** NSF BioSketch NSF Biographical Sketch Instructions
- **Last Updated:** 9 July 2019
- **Sharing:** Private [ Change ]

**NAME**

Trawick, Barton

**ORCID ID**

http://orcid.org/0000-0002-3635-3508
Pre-populate from Commons or ORCID
Control over your data

- Show/hide item
- Delete/edit existing items
- Create new entry
- New entry dialog box
Using citations with SciENcv biosketches

My Bibliography Collection

ORCID data feed

C. PRODUCTS
Acceptable products must be citable and accessible including but not limited to publications, data sets, software, pat products are unpublished documents not yet submitted for publication, invited lectures, and additional lists of product citation information including (where applicable and practicable) names of all authors, date of publication or release, journal or book, volume, issue, pages, website and Uniform Resource Locator (URL) or other Persistent Identifier.

PRODUCTS MOST CLOSELY RELATED TO THE PROPOSED PROJECT

- My Bibliography
- ORCID

- Sort by: Publication date
- Select: None
- 3 item(s) selected
- Refresh the list from ORCID

Add works to your ORCID record

https://support.orcid.org/hc/en-us/articles/360006973133-Add-works-to-your-ORCID-record
Using citations in SciENcv: large author lists
Using citations in SciENcv: large author lists
### NIH Biosketch

**NAME:**  
Trawick, Bart  

**OFA COMMON USER NAME:**  
(credential, e.g., agency login)  

**POSITION TITLE:**  
Director, Customer Services Division  

**EDUCATION AND TRAINING:**  
High school diploma, Texas A&M University, College Station, TX  

**INSTITUTION AND LOCATION:**  
Texas A&M University, College Station, TX  

**DEGREE:**  
MS  

**END DATE OF FIELD OF STUDY:**  
07/2000  

**BIOGRAPHICAL SKETCH:**  

I work to promote access to government-funded science and greater user experiences.  

2. Database resources of the National Center for Biotechnology Information. Nucleic Acids Res. 2016 Jan 4;45(D1):D17.  
3. Database resources of the National Center for Biotechnology Information. Nucleic Acids Res. 2015 Jan 4;43(Database issue):D17.  

**B. Positions and Honors:**  

**Positions and Employment:**  
2002 - 2005  
Staff Scientist, Bookshelf project, National Center for Biotechnology Information, Bethesda, MD  

2005 - 2009  
Project Supervisor, NLM/NIH, National Center for Biotechnology Information, Bethesda, MD  

2009 - 2017  
Public Services Section, National Center for Biotechnology Information, Bethesda, MD  

2017 - 2019  
Director, Customer Services Division, National Center for Biotechnology Information, Bethesda, MD  

**Other Experience and Professional Memberships:**  

2004  
NLM Special Achievement Award, National Library of Medicine  

2008  
National Institutes of Health Director's Award, National Institutes of Health  

2009  
NLM Special Achievement Award, National Library of Medicine  

2009  
National Institutes of Health Merit Award, National Institutes of Health  

2011  
NLM Special Achievement Award, National Library of Medicine

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### NSF Biosketch

**NAME:**  
Trawick, Bart  

**ORCID:**  
0000-0002-3635-3008  

**POSITION TITLE & INSTITUTION:**  
Staff Scientist, National Institutes of Health  

**INSTITUTION:**  
Texas A&M University  

**LOCATION:**  
College Station, TX  

**MAJOR AREA OF STUDY:**  
Chemistry  

**DEGREE:**  
BA  

**YEAR RECEIVED:**  
1996  

**BIOGRAPHICAL SKETCH:**  

I work to promote access to government-funded science and greater user experiences.  

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2017 - 2019  
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NLM Special Achievement Award, National Library of Medicine  

2008  
National Institutes of Health Director's Award, National Institutes of Health  

2009  
NLM Special Achievement Award, National Library of Medicine  

2009  
National Institutes of Health Merit Award, National Institutes of Health  

2011  
NLM Special Achievement Award, National Library of Medicine
SciENcv has a common data model: copy data to another format
SciENcv: NSF Current & Pending Support

**Current and Pending Support**

**Current and Pending Support Summary**

**PROJECT/PROPOSAL INFORMATION**

Current and Pending Support includes all resources made available to an individual in support of and/or related to all of his or her projects; provided that the individual is not required to provide a monetary contribution. [1] Information must be provided about all current and pending support, in addition to any projects currently under consideration from whatever source. [2], irrespective of whether such support is provided directly to the individual. Concurrent submission of a proposal to other organizations will not prejudice its review [3].

The time commitment or dollar value is not readily ascertainable, reasonable estimates should be provided. For example, Federal, State, local, foreign, public or private foundations, non-profits, industrial or other commercial organizations or other specific projects.

The Biological Sciences Directorate exception to this policy is delineated in PAPPG Chapter II.D.2.

**IN-KIND CONTRIBUTION INFORMATION**

Current and Pending Support also includes in-kind contributions (such as office/laboratory space, equipment, supplies, etc.) that are intended for use on the project being proposed to NSF. The information must be included as part of the Financial section of the proposal and need not be replicated in the individual’s Current and Pending Support submission. In-kind contributions are intended for use on the project being proposed that have associated time obligations must be reported below. If the time commitment or reasonable estimates should be provided.

<table>
<thead>
<tr>
<th>Project/Proposal Title</th>
<th>Source of Support</th>
<th>Status of Status</th>
<th>Total Award Amount</th>
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<tbody>
<tr>
<td>COVID-19 Infection vectors</td>
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<td>Current</td>
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<tr>
<td>COVID-19: Cardiac impacts</td>
<td>AHA</td>
<td>Current</td>
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**NSF CURRENT AND PENDING SUPPORT**

**PI/Co-PI/Scientific Personnel:** Trzcinski, Barton

<table>
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<th>Year</th>
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**PROJECT/PROPOSAL CURRENT SUPPORT**

1. Project/Proposal Title: COVID-19 infection vectors
   - Proposal/Award Number (if available): [Redacted]
   - Source of Support: NIH
   - Primary Place of Performance: Bethesda, MD
   - Project Proposal Start Date (if available): 2020-02-12
   - Total Award Amount (including Indirect Costs): $1,500,000
   - Person-Month(s) (or Partial Person-Months) Per Year Committed: 12

2. Project/Proposal Title: COVID-19: Cardiac impacts
   - Proposal/Award Number (if available): 12345
   - Source of Support: AHA
   - Primary Place of Performance: Bowling Green, KY
   - Project Proposal Start Date (if available): [Redacted]
   - Total Award Amount (including Indirect Costs): $125,000
   - Person-Month(s) (or Partial Person-Months) Per Year Committed: 2020-02-12

**XML attachment**
SciENcv Features

Create & store multiple biosketches plus C&PS forms

Output PDFs on demand

Have a delegate manage accounts

From scratch, from a data source, or copied from an existing biosketch
Upcoming SciENcv Developments

Current agency support

- NIH
- DoEd
- NSF

Planned updates

- NIH
- Biosketch
- Other Support

“In the works”

- DoE SC
- Biosketch
- C&PS

Fall 2021

Early 2022
SciENcv, by the numbers

313,000 Documents generated

Account linkages
63,700 Commons
55,000 ORCiD
24,200 NSF

26,000 Public Biosketches

As of 5/25/2021
More information

SciENcv is available at:

My NCBI documentation:
http://www.ncbi.nlm.nih.gov/books/NBK3843/

SciENcv video overview:
http://youtu.be/PRWy-3GXhtU

SciENcv for NSF Users: Biographical Sketches:
https://youtu.be/nk7qlbele0k

SciENcv for NSF Users: Current and Pending Support
https://youtu.be/bhWQYvEEtJs

SciENcv questions/feedback: info@ncbi.nlm.nih.gov
NSF Login and usage questions: 1-800-381-1532 or rgov@nsf.gov
NSF Policy questions: policy@nsf.gov
Questions

Are most welcome!