Standard Application Process (SAP) Portal Applicant User Guide

Updated June 2026

NOTICE TO SAP USERS: The National Center for Education Statistics (NCES) is currently not accepting new applications for access to data through the Standard Application Process. Review of applications for access to data from NCES is also paused until further notice.

NOTICE TO SAP USERS: The Internal Revenue Service (IRS) Statistics of Income (SOI) is currently postponing the 2025 Joint Statistical Research Program (JSRP) application window and is not accepting new proposals at this time, with a re-evaluation of the program's status to occur at a date to be determined.

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About the SAP Portal (sap.nsf.gov)

SAP.nsf.gov is the official portal for the Standard Application Process (SAP). Federal statistical agencies and units developed the SAP in response to the Foundations for Evidence-Based Policymaking Act of 2018. The site includes a data catalog that allows users to search for confidential federal data, as well as an application system through which users can request access to those data. Submitted applications will be evaluated based on SAP standard review criteria described in Appendix B.

For more information about the SAP, visit: https://ncses.nsf.gov/initiatives/standard-application-process

Participating Agencies and Units

The Office of Management and Budget (OMB) recognizes 13 agencies and 3 statistical units whose primary mission is producing official statistics. Throughout this guide, the term **agency** refers to both agencies and statistical units.

For questions about a specific agency's programs, data products, or data access applications, please use the contact information provided on Contact page within the SAP portal.

- Bureau of Economic Analysis (BEA)
- Bureau of Justice Statistics (BJS)
- Bureau of Labor Statistics (BLS)
- Bureau of Transportation Statistics (BTS)
- Census Bureau (Census)
- U.S. Energy Information Administration (EIA)
- Federal Reserve Board (FRB): Microeconomics Survey Unit
- Internal Revenue Service (IRS): Statistics of Income (SOI) Division
- National Center for Education Statistics (NCES)
- National Center for Health Statistics (NCHS)
- National Center for Science and Engineering Statistics (NCSES)
- Social Security Administration (SSA): Office of Research, Evaluation, and Statistics (ORES)
- Substance Abuse and Mental Health Services Administration (SAMHSA): Center for Behavioral Health Statistics and Quality
- U.S. Department of Agriculture (USDA): Economic Research Service (ERS)
- U.S. Department of Agriculture (USDA): National Agricultural Statistics Service (NASS)
- U.S. Department of Agriculture (USDA): National Animal Health Monitoring System (NAHMS)

Using the SAP Portal (sap.nsf.gov)

The SAP portal allows you to manage your application throughout the entire process—from finding data, to submitting an application, to receiving a final determination. This guide explains how applicants and prospective applicants can use the portal. A separate guide is available for agency staff who review applications.

The steps below describe a typical application workflow:

1. **Find data**
    - Search for or browse restricted-access datasets relevant to your statistical research.
2. **Review dataset information**
    - Read the metadata for each dataset to determine whether it meets your research needs.
3. **Add dataset to My Basket**
    - Select the datasets you want to request access to and add them to My Basket.
4. **Start, submit, and track an application**
    - Enter all required fields and upload all required documents.
    - Submit your application.
    - Monitor your application status in the SAP portal.
    - You will receive email notifications when the status of your application changes.
5. **Agency review and determination**
    - Log in to **sap.nsf.gov** to view the agency's determination and any comments provided by agency reviewers.

1. Find data

You can browse the entire SAP Data Catalog by leaving the search box on **sap.nsf.gov** blank and selecting **Enter**. You can search by keyword, or browse by selecting an agency or topic below the search bar. You can also combine keywords, topics, and agencies to narrow your results.

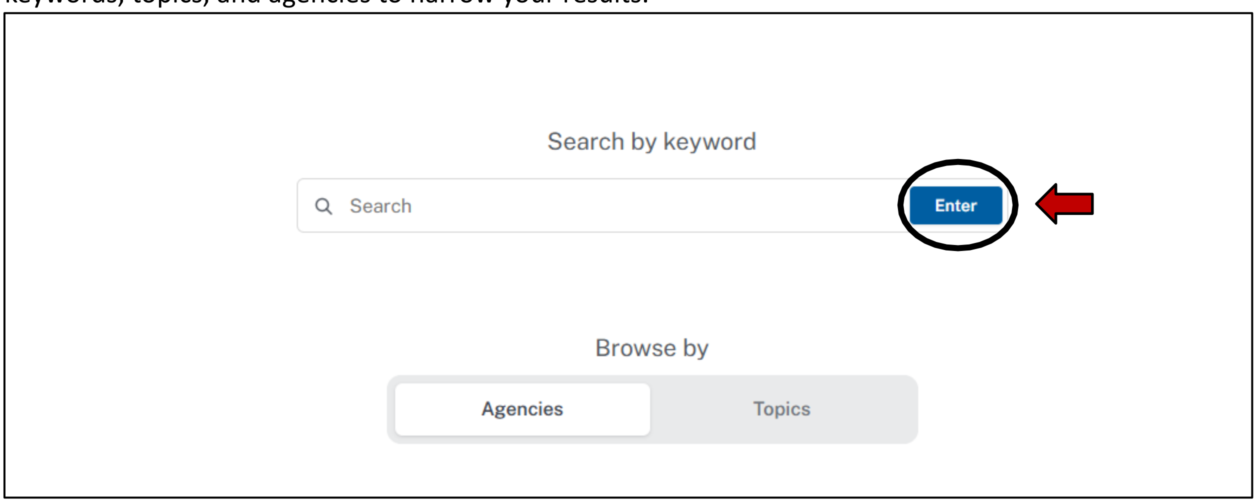


Figure 1 Enter button and empty search box.

Additionally, you can filter search results by other metadata fields, as shown in the image below. In Figure 2, results are shown for the keyword "families" in data from the Census Bureau.

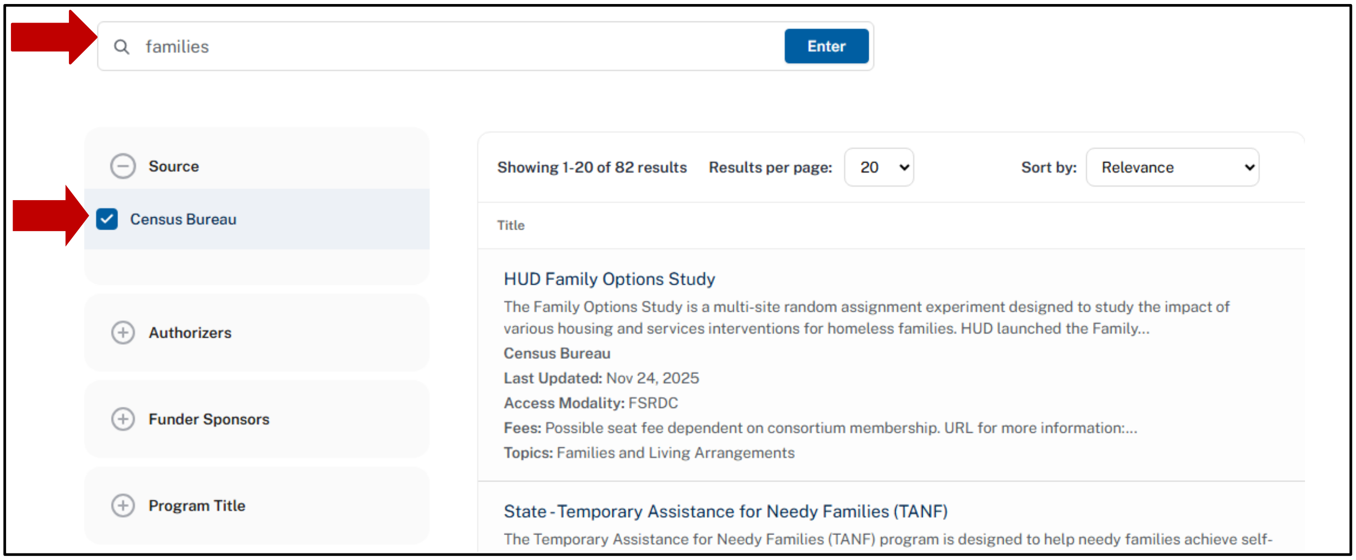


Figure 2. Search box containing the term "families" and Source filtered on Census Bureau.

Select the hyperlinked dataset title to view the detailed metadata for a dataset as shown in Figure 3.

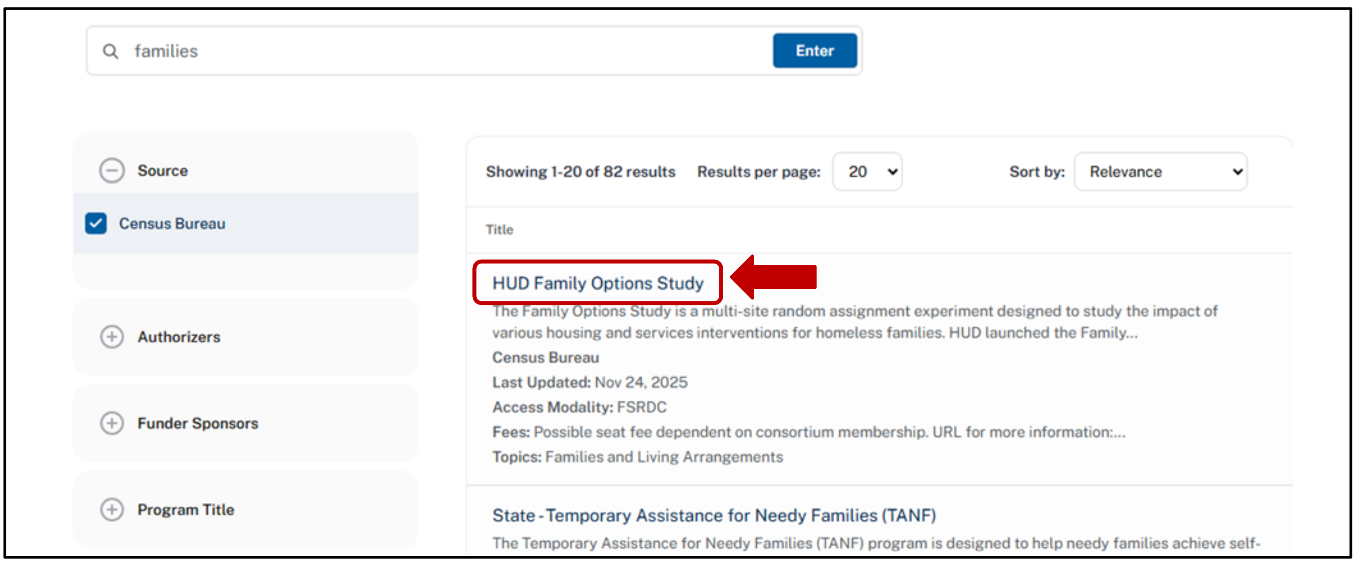


Figure 3. Hyperlinked dataset title

2. Review dataset information

Review the detailed metadata for each dataset to learn more about the data, access requirements, and available documentation before adding it to your basket.

The **Metadata** menu on the left side of the dataset page outlines the information available for each dataset as shown in Figure 4.

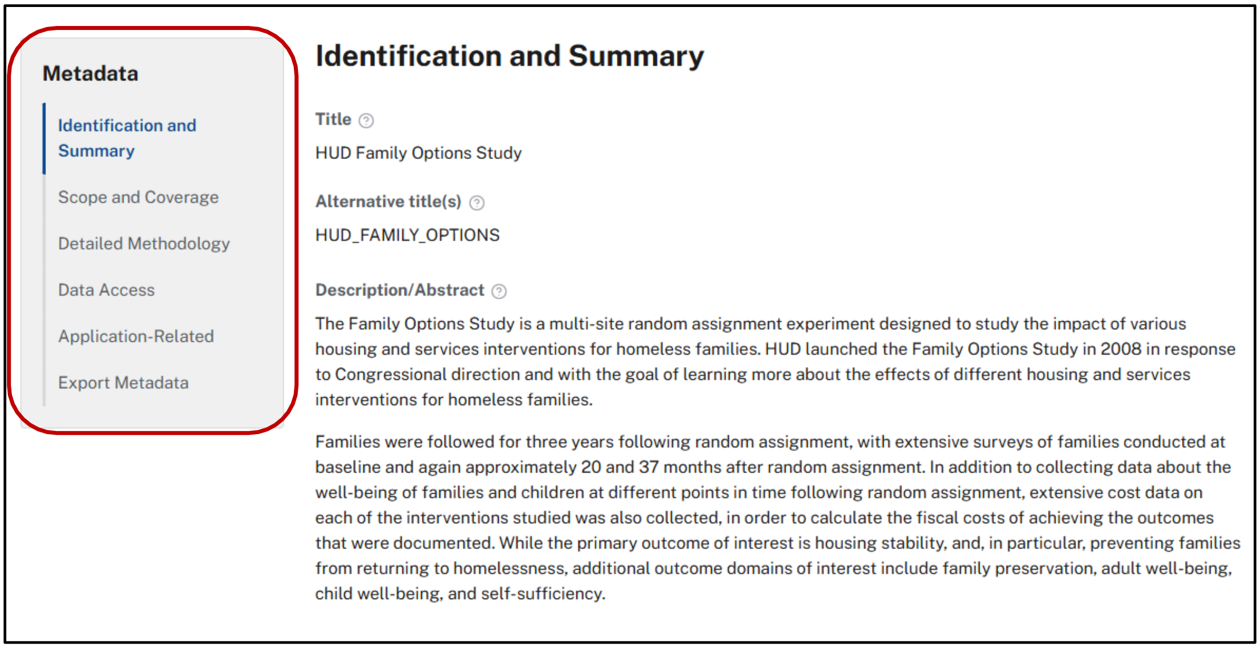


*Figure 4. The **Metadata** menu on the left of the dataset page*

3. Add dataset to My Basket

Once you find a dataset you want to apply for, select **[Add to My Basket]** button.

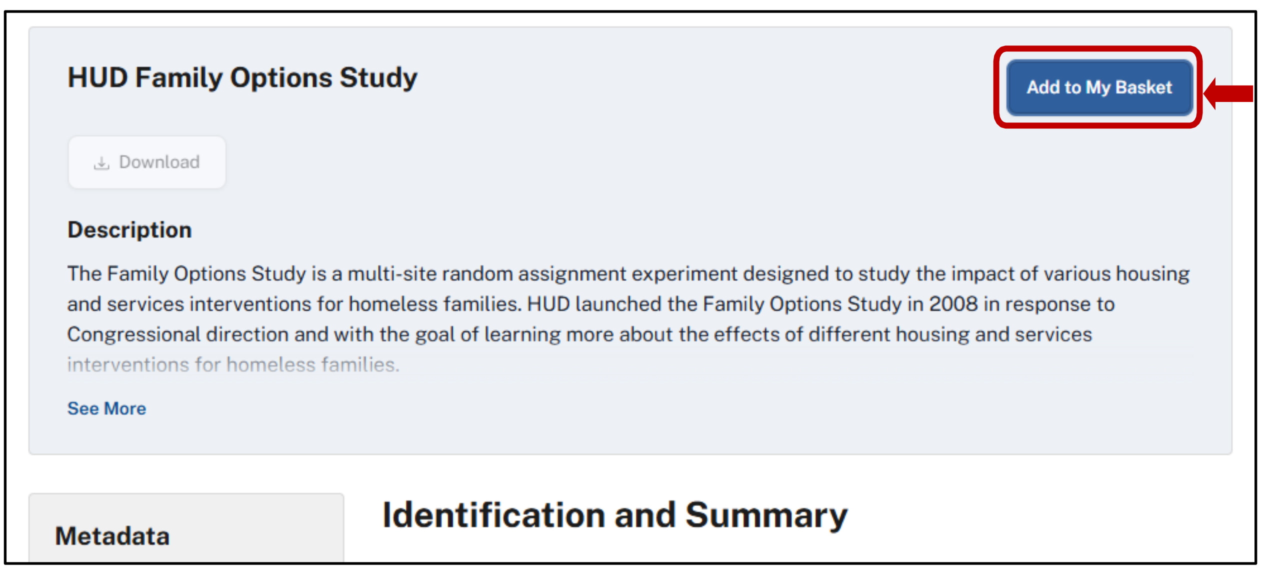


Figure 5. Add to My Basket button at the top of the dataset homepage.

After adding the data to **My Basket**, you will be prompted to log in and start the application process. If you do not already have an account, you will be prompted to create one. You will use this account to access your application dashboard and view your application progress.

You may add multiple datasets to your basket for inclusion in a single application. However, you should verify that the data can be accessed in the same location. The access modality in the **Data Access** tab of the dataset homepage lists where the data can be accessed.

If you are applying to access datasets from multiple agencies, it is best to contact the agency responsible for making the data available (listed as the source in the metadata identification summary) to make sure their data can be combined. You can find agency contact information in the [Agencies] and [Contact] sections.

4. Start, submit, and track an application

Begin application

You can navigate to **My Basket** at any time to view selected datasets.

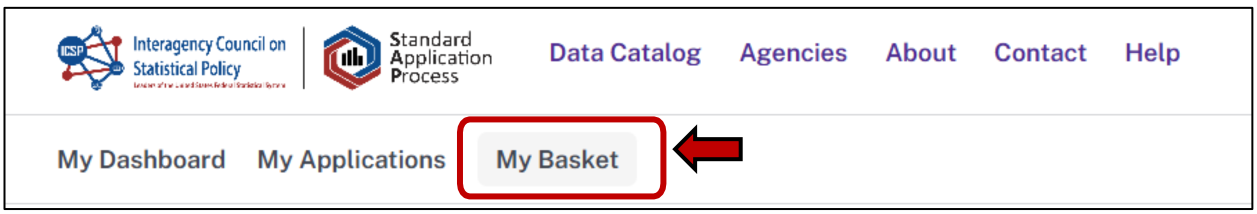


Figure 6. A basket with two datasets.

From this page, select **[Continue Browsing]** button to return to the catalog and search for more data. Select **[Add to Existing Application]** button to add the selected dataset to an application you have already started and **[Start Application]** button if your basket includes all the datasets you would like to include in your application.

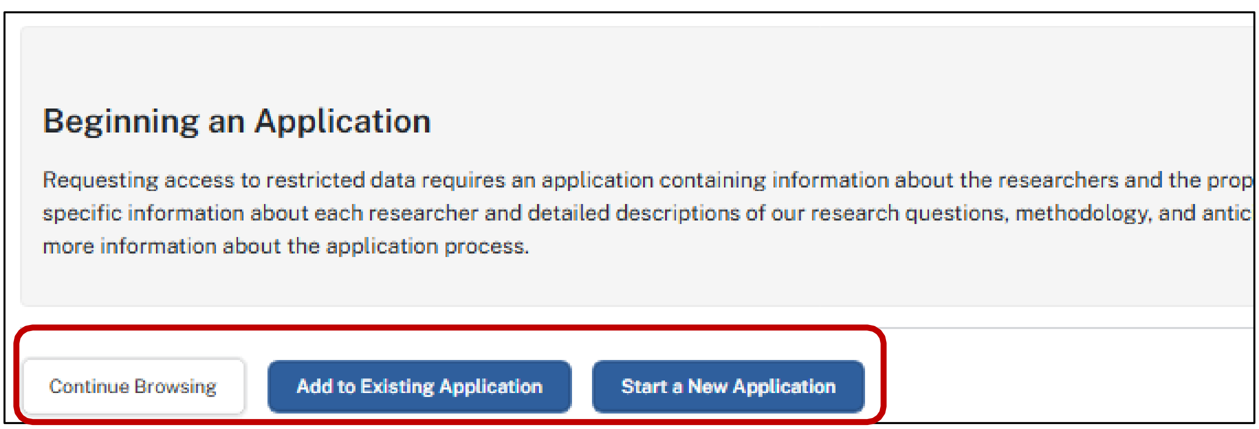


Figure 7. Continue Browsing, Add to Existing Application and Start Application buttons on the basket page.

NOTE: We strongly recommend that the principal investigator (PI) or co-principal investigator (co-PI) create the application. Only the PI or co-PI can make edits and submit the application. Researchers can view the application but cannot make edits or submit the application.

Complete application

The application requests information about the research team and the project. You can preview the application questions in **Appendix A**. Most fields are text boxes, but some fields require a text document (PDF or .docx) upload. The fields requiring an upload are those that may need formatting, such as tables and formulas.

Overview

The **Overview** tab requires you to enter an Application Title and Project Duration in months.

Figure 8. The Overview tab on the application.

You do not need to finish the application in one session. To save your work, at the bottom of the screen, select the **[Save]** button to stay on the current page, or the **[Save and Continue]** button to move the next section. You can save a section only after completing all required fields in that section.

Data Selected

If you find or wish to select additional data after you have begun the application, you may add it by navigating back to the Data Catalog, locating the dataset, and selecting **[Add to Existing Application]** to add the selected dataset to an application you have already started.

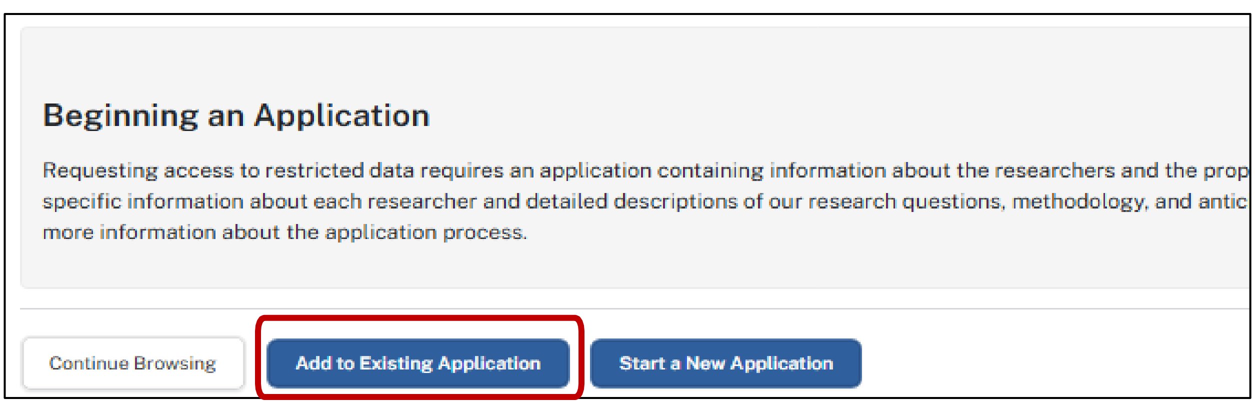
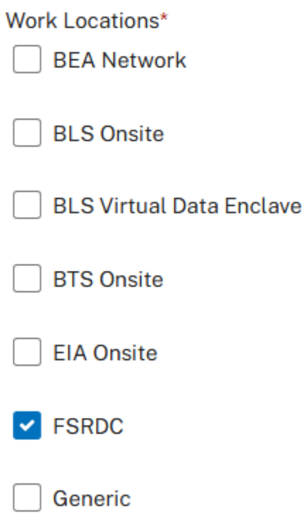


Figure 9. Image of the Data Selected screen with the Add Application Dataset button highlighted.

Some datasets may require you to select specific provisioning units in the **Data Selected,** such as by time or geography.

Additionally, you will need to refer to the metadata listed in the SAP Data Catalog to complete the **Work Location** field. You can refer to the access modality listed in the **Data Access** metadata tab and make one selection (although you can select multiple locations within a top-level access modality that allows for multiple locations such as the Federal Statistical Research Data Centers (FSRDC) network). This is the only place where that data can be accessed.



Work Locations*

- [ ] BEA Network
- [ ] BLS Onsite
- [ ] BLS Virtual Data Enclave
- [ ] BTS Onsite
- [ ] EIA Onsite
- [x] FSRDC
- [ ] Generic

*Figure 10. The **Work Location** field allows researchers to select more than one location within a top-level access modality.*

If you are applying for multiple datasets from more than one agency, make sure that they can be accessed in the same location by contacting the agency or agencies.

Researcher Information

Please review the Eligibility Requirements section in this User Guide before completing your application. Eligibility requirements are unique to the data-owning agency and may include items like U.S. **citizenship** or U.S. **residency**. Responses to some application fields in the Researcher Information section may be subject to agency-specific requirements, such as the **Curriculum Vitae** as shown in Figure 11.

Figure 11. Fields of the ***Add Team Member*** *page of the* ***Research Team*** *section, such as a* ***Curriculum Vitae****.*

Project Overview

The Project Overview tab requires written responses to **Funding, Research Question, Demonstrated Need, Study Population,** and **Project Abstract.** The **Timeline** question requires you to upload a .pdf or .docx file. A template is provided, as seen in Figure 12.

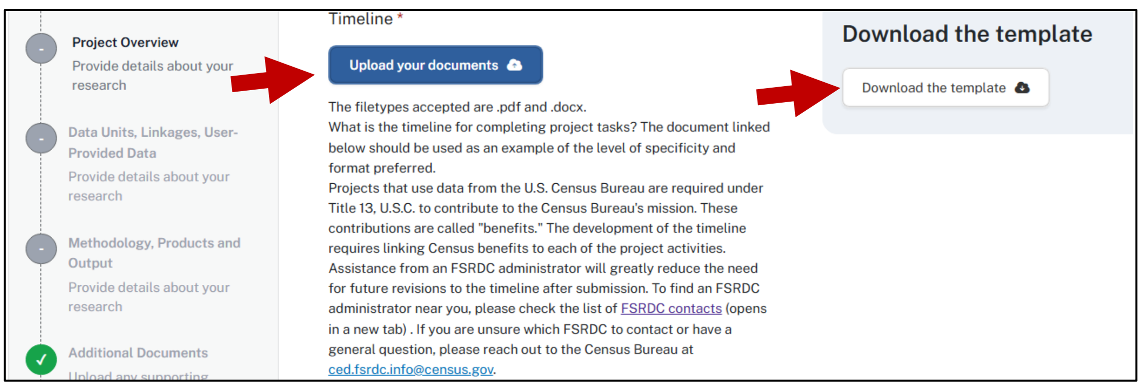
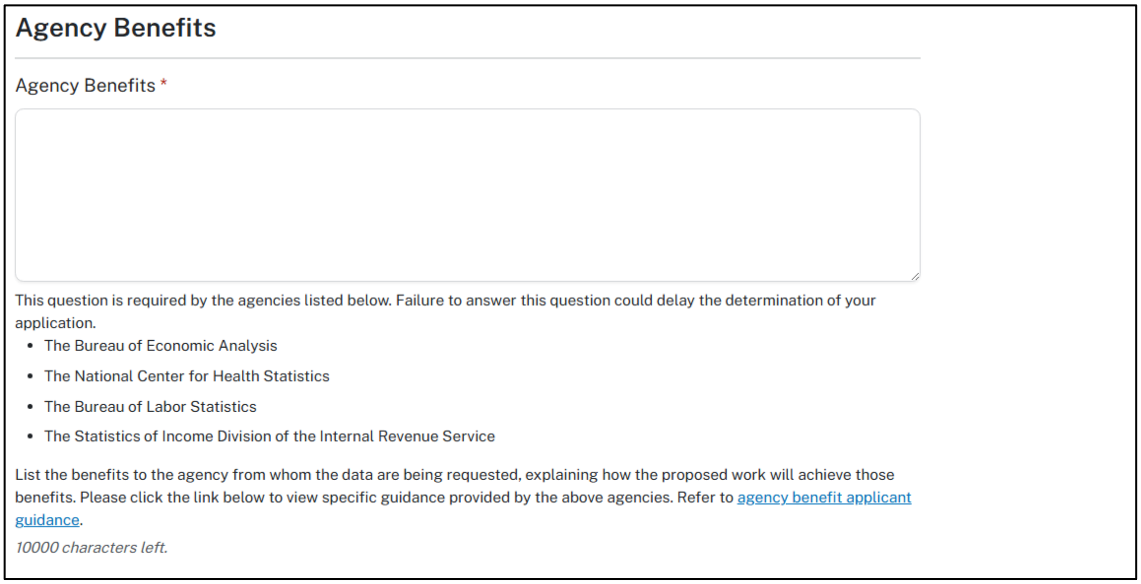


Figure 12. Fields of the ***Project Overview*** *section, such as* ***Timeline****.*

Data Units, Linkages, User-Provided Data

Responses to some application fields in the Data Units, Linkages, User-Provided Data section may be subject to agency-specific requirements, such as the **Agency Benefits** or **Census Benefits** fields, as shown in Figure 13 and Figure 14.



Agency Benefits

Agency Benefits *

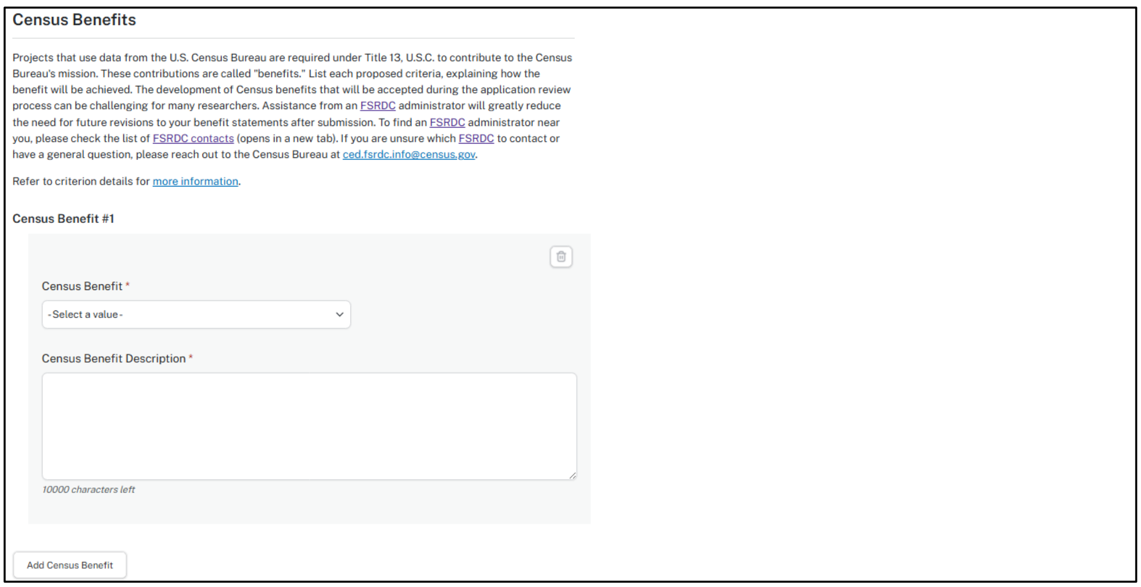
This question is required by the agencies listed below. Failure to answer this question could delay the determination of your application.

- The Bureau of Economic Analysis
- The National Center for Health Statistics
- The Bureau of Labor Statistics
- The Statistics of Income Division of the Internal Revenue Service

List the benefits to the agency from whom the data are being requested, explaining how the proposed work will achieve those benefits. Please click the link below to view specific guidance provided by the above agencies. Refer to agency benefit applicant guidance.

10000 characters left.

*Figure 13. Fields of the **Data Units, Linkages, User-Provided Data** section, such as **Agency Benefits**.*



Census Benefits

Projects that use data from the U.S. Census Bureau are required under Title 13, U.S.C. to contribute to the Census Bureau's mission. These contributions are called "benefits." List each proposed criteria, explaining how the benefit will be achieved. The development of Census benefits that will be accepted during the application review process can be challenging for many researchers. Assistance from an FSRDC administrator will greatly reduce the need for future revisions to your benefit statements after submission. To find an FSRDC administrator near you, please check the list of FSRDC contacts (opens in a new tab). If you are unsure which FSRDC to contact or have a general question, please reach out to the Census Bureau at ced.fsrdc.info@census.gov.

Refer to criterion details for more information.

Census Benefit #1

Census Benefit *

- Select a value -

Census Benefit Description *

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Add Census Benefit

*Figure 14. Fields of the **Data Units, Linkages, User-Provided Data** section, such as **Census Benefits**.*

Additional Documents

Some agencies or datasets require additional documents to be completed and uploaded. If additional documents are required for your application, they will appear in the Additional Documents section of the application. If no additional documents are required, you may skip this section.

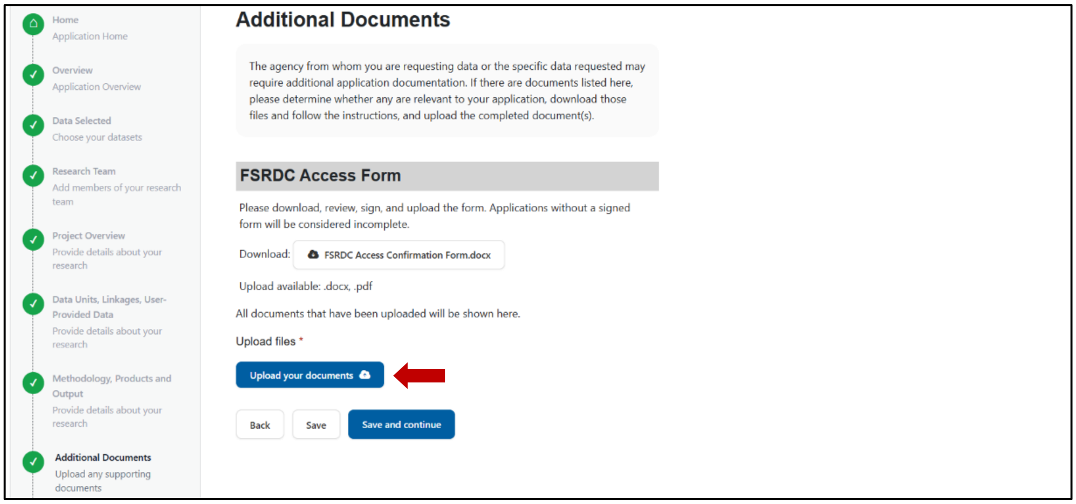

Figure 15. Required documents will appear in the ***Additional Documents*** *section of the application.*

Submit Application

Once all required sections have been completed, select **Confirm Your Submission** check box and **[Submit Application]** button.

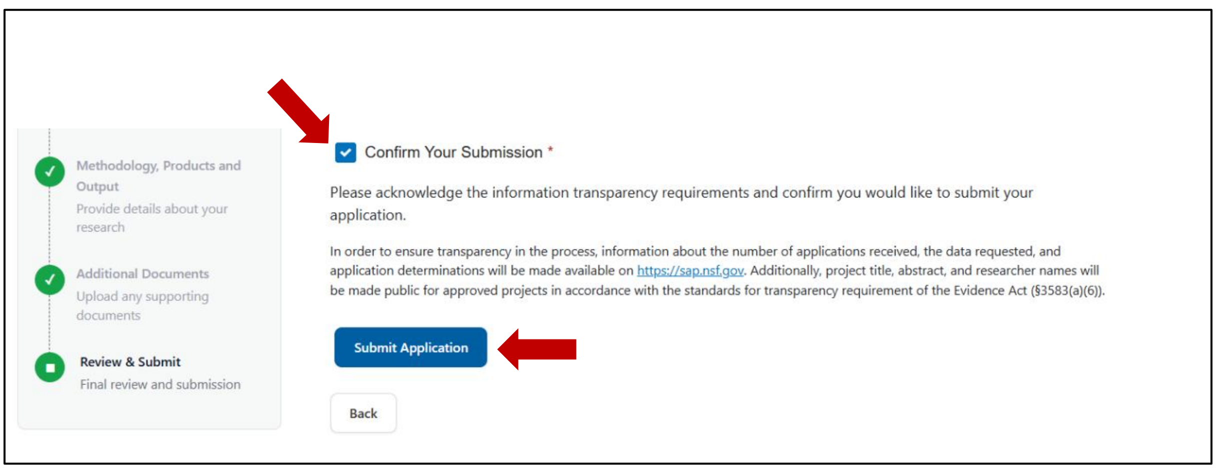

Figure 16. ***Confirm Your Submission*** *and* ***Submit Application*** *button.*

Once your application is submitted, you will see a green banner that says "Your application has been submitted and is now under review." as shown in Figure 17. You will also receive an email with a link back to the application. You will not be able to edit the application further unless asked to do so by one of the reviewing agencies.

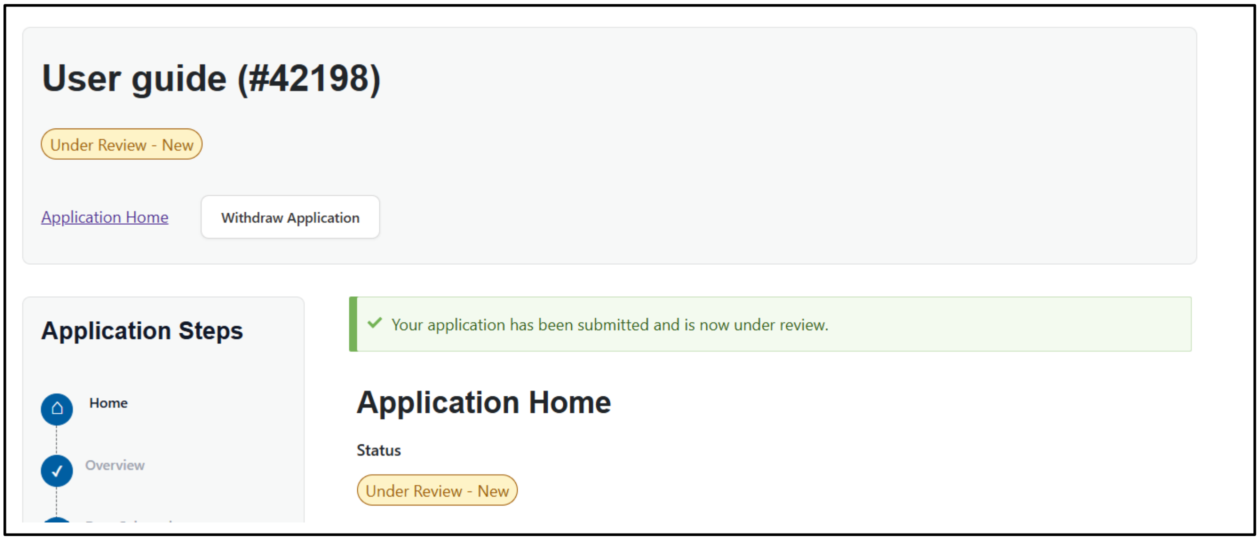

Figure 17. The confirmation screen after successful submission of an application.

5. Agency review and determination

Applications are reviewed by agency staff responsible for granting access to restricted data. Agencies evaluate applications according to a standard set of review criteria, outlined in the SAP Policy M-23-04 (section 4.1). Agency reviewers will make one of three determinations upon completing their review: Approved, Not Approved, or Changes Needed. If the determination is Changes Needed, you may revise the application to address the requested changes.

SAP agencies also follow set timelines in reviewing applications for data that they fully control:

- If you request data from one agency or unit, the agency typically has 12 weeks to review your application and provide a final determination of Approved or Not Approved.
- If you request data from multiple agencies or units, the agencies typically have 24 weeks to review and collaborate to provide a final determination of Approved or Not Approved.

However, if the data you have applied for requires approval from an organization or entity outside of the SAP (such as a state or local government), the SAP and non-SAP agencies do not have a time limit on providing a final determination of Approved or Not Approved.

In most cases, application review takes less time than the time limit. However, in some cases, application review may take longer.

- Agencies can request review extensions if needed.
- The review timeframes are paused while you are responding to agencies' comments on an application that is in a "Changes Needed" state (see below).

Changes Needed

An agency may ask you to make changes to your application. Agencies will request changes when they determine that an application does not yet meet the standard review criteria but could do so with minor adjustments.

You will receive an email notification if an agency requests changes. You can then log in to your application dashboard to view the agency's comments and to revise your application. If you have questions or are unclear about the agency's comments, please contact the agency through the SAP portal Contact page.

Agency-specific Information

1. Eligibility requirements

Applicants for data from some agencies must meet specific requirements as shown below. Most agencies do not allow researchers to access data from outside the U.S. If you have questions about accessing data from outside the US, please work directly with that agency.

Bureau of Economic Analysis (BEA):

- U.S. Citizenship required.

Bureau of Justice Statistics (BJS):

- Affiliation with an educational institution, research arm of a government agency, or non-profit entity.
- Evidence of fulfillment of human subjects requirements.

Bureau of Labor Statistics (BLS)

- Affiliation with a U.S. educational institution or non-profit entity.

Census Bureau:

- Residency in the U.S. for three out of the last five years.
- Affiliation with a U.S. educational institution, research arm of a U.S. government agency, or non-profit entity.

Energy Information Administration (EIA)

- U.S. Citizenship required.
- Affiliation with a U.S. educational institution or non-profit entity.

Federal Reserve Board (FRB):

- U.S. Citizenship required.
- Residency in the U.S. for three out of the last five years.

IRS Statistics of Income (IRS SOI):

- U.S. Citizenship required.
- Affiliation with a U.S. educational institution or U.S. non-profit entity.

National Agricultural Statistics Service (NASS):

- Research must be conducted in the U.S.

- Graduate students are not eligible to be principal investigators.

National Center for Education Statistics (NCES):

- Affiliation with a U.S. educational institution or non-profit entity.

National Center for Science and Engineering Statistics (NCSES):

- Affiliation with a U.S. educational institution or non-profit entity.

USDA Economic Research Service (ERS):

- U.S. Citizenship required.

2. Access Modalities and Available Software

The "access modality" is the place where the requested data can be accessed and used. Some are physical locations and others are virtual. This section lists the access modalities, including the agencies who use them and software available within each.

- **BEA Network**:
  - Agency: BEA
  - Access provided at the user's domicile.
  - Security clearance is required.
  - Software Available: MS Office, Python, R and RStudio, SAS, Stata, and Stat/Transfer.
- **BLS Virtual Data Enclave**:
  - Agency: BLS
  - Offsite, limited remote access to restricted data.
  - Available for NLSY Geocode and CFOI-Masked data.
  - More information: www.bls.gov/rda/offsite.htm.
  - Software Available: Python, R and RStudio, Stata, and Stat/Transfer.
- **BTS Onsite**:
  - Agency: BTS
  - Access is provided in a secured room in BTS offices in Washington, DC on a computer provided by BTS
  - Software Available: Varies.
- **EIA Onsite**
  - Agency: EIA
  - Access at EIA's Forrestal Building located in Washington, DC
  - Software Available: Excel, SAS, R, RStudio, Python, SQL Developer and others as requested prior to visit.
- **FRB Onsite**:
  - Agency: FRB
  - Access via a physical data enclave at the Federal Reserve Bank headquarters (Washington, D.C.).
  - Software Available: Python, R and RStudio, SAS, Stata, and Stat/Transfer.
- **Federal Statistical Research Data Centers** (FSRDCs):
  - Agencies: BEA, BJS, Census, NCSES, NCHS, SAMHSA
  - Census Bureau facilities at partner institutions.

  - Meets physical and information security requirements.
  - Remote access via secure Virtual Desktop Interface (VDI) may be available.
  - Researchers must obtain Census Bureau Special Sworn Status (SSS) and pass a background investigation.
  - Software Available: Anaconda, Gurobi, Intel Composer, Knittro, MADD, Mathematica, MATLAB, OpenGeoda, R and Rstudio, SAS, Stat/Transfer, Stata, Stata-MP, SUDAAN, and Tomlab.
- **BJS NACJD**
  - Agency: BJS
  - Access via a virtual data enclave and secure download, or physical data enclave depending on the data
  - Physical data enclave located at the University of Michigan
  - Software Available: ArcGIS Desktop, Python, SPSS (including AMOS), MATLAB, Mplus, R and RStudio, SAS, Stat/Transfer, Stata, and SUDAAN
- **IRS-issued Laptop**:
  - Agency: IRS
  - Remote access to the IRS network via secure VPN.
  - Government laptop issued and configured by IRS IT.
  - Software Available: Python, R, SAS, and Stata.
- **IRS Onsite**:
  - Agency: IRS
  - Access at IRS Headquarters, Submission Processing Center, or other satellite (field) offices.
  - Software Available: Python, R, SAS, and Stata.
- **NAHMS Onsite:**
  - Agencies: NAHMS
  - NOTE: If a request includes both NASS and NAHMS data, the NAHMS Onsite option cannot be used, the USDA Virtual Data Enclave must be used
  - Researchers access restricted-use data the NAHMS physical data lab in Fort Collins, CO.
  - Software Available: MS Office, R, RStudio, SAS, SUDAAN, and ArcGIS
- **NCHS RDC**:
  - Agencies: NCHS, SAMHSA
  - Researchers access restricted-use NCHS data at Research Data Centers (RDCs) in Hyattsville, MD, Atlanta, GA, and Rockville, MD.
  - RDCs are open by appointment only.
  - Computers are not connected to the Internet.
  - RDC Analyst reviews all materials and output.
  - Electronic devices are not permitted.
  - NCHS projects can also access NCHS data at Federal Statistical RDCs (FSRDCs).
  - Non-U.S. citizens are generally encouraged to use FSRDCs.
  - Software Available: R, SAS, Stata, and SUDAAN.
- **NCSES Secure Data Access Facility** (SDAF):
  - Agency: NCSES
  - Provides secure remote access to NCSES restricted-use data.
  - Researchers must apply, be approved, and complete training.

- Access via approved computer and private internet connection.
- Personal file space and software suite provided.
- More information: https://ncses.nsf.gov/about/licensing.
- Software Available: Jupyter Notebook/GitHub, Microsoft Suite (e.g., Word, Excel, Access), R and RStudio, SAS, Stata, and Stat/Transfer.

- **NCES Remote Access** (Administrative Data Research Facility - ADRF):
    - Agency: NCES
    - A secure cloud-based computing platform.
    - Promotes collaboration, facilitates documentation, and provides data use information.
    - Provides secure access to over 100 confidential government datasets from 50+ agencies.
    - More information: https://coleridgeinitiative.org/adrf/
    - Software Available: MATLAB, Mplus, Python, R and RStudio, SPSS, Stata, Stat/Transfer, and QGIS.
- **Requester Secure Site**:
    - Agencies: BJS, NCES, SSA
    - Researchers use data at their institutions.
    - Method and requirements set by the data-owning agency.
    - May include non-networked computers, secure offices, or other security provisions.
    - Software Available: Varies by agency
- **SSA Onsite**:
    - Agency: SSA
    - Access via a physical data enclave at the Social Security Administration in Washington, D.C.
    - Software Available: COBOL, Excel software (to access and store data).
- **USDA Enclave**:
    - Agencies: ERS, NASS, NAHMS
    - Offsite remote access via secure internet connection.
    - Researchers use their own computer and web browser.
    - Personal file space and software suite provided.
    - Software Available: DBeaver, Jupyter Lab with Python and R kernels, LaTeX, LibreOffice, MS Office, Python, PyCharm, R, RStudio, SAS, SQL Server Management Studio, Stata, and SVN.

3. Required agency-specific documents

Some agencies require documents beyond the application itself, as listed below.

BEA

- Required Document:
    - Curriculum Vitae (CV) for each applicant

BJS

- Required Documents:
    - CV for each applicant

  - Institutional review board documentation
  - Signed NACJD restricted data use agreement
  - Signed Privacy Certificate

Census

- Required Document:
  - Signed FSRDC access confirmation form

EIA

- Required Document:
  - CV for each applicant

ERS

- List of requested variables
- Signed MOU (when listed as an authorizer on a single dataset with NASS)

NASS

- Required Documents:
  - Signed MOU
  - List of requested variables (Census of Agriculture requests only)

NCHS

- Required Documents:
  - CV for each applicant
  - Variables requested must be provided in a data dictionary format that lists all variables (i.e., restricted-use, public-use and external) needed for the research project

SAMHSA

- Required Documents:
  - List of requested variables

4. Project duration

Participating agencies differ in the length of time for which they allow access to restricted-use data. The list below provides the maximum duration allowed for each.

- BEA: 60 months
- BJS: 72 months
- BLS: 48 months
- EIA: 60 months
- ERS: 60 months
- FRB: 60 months
- IRS: 60 months
- NAHMS: 36 months
- NASS: 36 months
- NCES: Unlimited
- NCHS: 36 months
- NCSES: 60 months
- SAMHSA: 36 months
- SSA: 60 months

5. Variables Requested

The following agencies require lists of specific variables requested. Please refer to the dataset's data dictionary to review the variables available. The agency will determine whether the proposed use of variables is appropriate and evaluate project feasibility based on the variables requested.

- NASS: For Census of Agriculture projects, complete the spreadsheet for all variables needed from NASS and email to SM.NASS.Data.Lab@usda.gov. Refer to the data dictionary for the dataset to see the available variables.
- NCHS: List all variables needed for research project (i.e., restricted-use, public-use and any external variable). Refer to the agency dataset data dictionaries for available variables.
- SAMHSA: List all variables needed from SAMHSA. Refer to the data dictionary for the dataset to see the available variables.
- ERS: List all variables needed from ERS. Refer to the data dictionary for the dataset to see the available variables.

6. Agency Benefits

Projects requesting data from the following agencies require that applicants demonstrate how their projects will benefit the agency or agencies providing the data:

- BEA (Bureau of Economic Analysis)
- Census Bureau
- BLS (Bureau of Labor Statistics)
- IRS-SOI (Internal Revenue Service – Statistics of Income Division)
- NCHS (National Center for Health Statistics)

Projects requesting Census Bureau data must complete the Census Benefits section.

Agency-specific criteria for evaluating the applicant's answers are provided within the application. If you have questions while completing this section, contact the agency responsible for making the data available. Agency contact information can be found on the Contact page.

Public Reporting

The Standard Application Process is required to provide the public with information surrounding applications to access confidential data. This includes both approved and unapproved applications.

For applications with a final determination of Not Approved, the following information is reported to the public:

- Requested datasets
- Statistical agencies and units involved
- The date the application was received

- Proposed project duration
- Status of application
- Unmet review criteria

For approved projects, the following information is reported to the public:

- Requested datasets
- Statistical agencies and units involved
- The date the application was received
- Project title
- Project abstract
- Approval date
- Project duration
- Names of the principal investigator/lead researcher and other persons requesting access

Getting Help

While browsing the SAP Data Catalog, you might encounter questions not addressed by the metadata, including inquiries about data linkages, access procedures, or application expectations. For detailed questions about agency-specific data programs or products, please contact the relevant agency directly using the details provided on the Contact page within sap.nsf.gov.

If you require technical support for the website or application system, such as assistance with file uploads or application submissions, please email SAPSupport@mathematica-mpr.com.

Providing Feedback

Your feedback is essential to improving the SAP user experience. You can submit site feedback or report any bugs by emailing SAPSupport@mathematica-mpr.com.

Accessing Confidential Data After Approval

Submitting an application is one step in the process of gaining access to confidential data. If your application is approved, there will be additional steps and documentation required. These may include background investigations, data security training, and licensing. After your application is approved, the data-owning agency or agencies will contact you to initiate their data security protocols.

Criteria for Applicant Review

Note: Some of the criteria below are verified following application approval.

Identification:

- Verifying your identity, job title, organization, and skill level.

- Ensuring you meet the legal requirements for accessing the data (e.g., citizenship requirements for some agencies).
- Checking if you meet the feasibility criteria for the application review.

Training:

- Completing training on data use, data management, confidentiality, and cybersecurity.
- Required by some agencies and completed after application approval.

Agreements:

- Signing agreements, such as non-disclosure agreements or data use agreements.
- Potentially creating a security plan outlining how you will protect the data.

Investigation:

- Undergoing a background check, such as a National Agency Check with Inquiries (NACI) or a moderate background investigation (MBI).
- Required by some agencies and for access to certain datasets.

Appendix A: Standard Application Questions

This appendix lists all application questions so you can prepare your responses before starting an application.

It includes all questions, help text, and links, although some agency-specific questions may not appear in every application. An asterisk (*) indicates a required question. Each question also identifies the expected response format, such as an in-application response or a file upload.

Questions shown in **bold** appear only when requesting data from specific agencies.

Depending on the data selected, additional documents may be required. These documents are typically provided for download, completion, and upload as part of the application process.

In some cases, data owners may request additional documentation—such as Institutional Review Board (IRB) approval or security plans—after an application has been approved.

Overview

Project Title* [text box, max characters allowed: 200]

- Title of project.

Project Duration* [text box, max characters allowed: 2]

- How long is your proposed project in months? Make sure there is sufficient time to achieve project objectives and that the duration is not greater than the data provider's maximum duration. Requests for extensions beyond the initial proposed duration depend on the practices of the providing agency. Refer to the document below for the maximum length allowed by the agency from whom you are requesting data. Maximum duration by agency.

Data Selected

Provisioned by [multiselect]**:**

- **State***
- **Other Geographic Unit**
- **Month**
- **Year***
- **Other Time Unit***
- **Units Other Than Time or Geography***
- Some datasets are made available only for the specific time or geographic units. For each dataset you’re requesting, if there are “Provisioned by…” fields on the “Application-related” tab on the main dataset page, the appropriate questions will appear.

Work Location* [check box]

- Where will the data be accessed? If you and, if applicable, other members of the research team plan on using data in multiple places, please mark all that apply. Note that there are often fees for accessing data in a Federal Statistical Research Data Center (FSRDC). Please contact the

FSRDC location you intend to use for more information. Other data may have fees for access as noted in the "Fees" field in the "Data Access" section of the information about the asset.

Software Requirements [text box, max characters allowed: 200]

- If your project requires statistical software other than that which is currently available in the location in which you will access the data, please indicate that here.

Note: A pop-up window with a table of software by location is provided. This information is also listed in the User Guide.

Research Team

Team Member's Role* [radio button]

- Indicate if the team member is the Principal Investigator (PI), Co-Principal Investigator (Co-PI), or Researcher

Full Name* [text box, max characters allowed: 200]

- Full name of the team member

Institutional Affiliation* [text box, max characters allowed: 200]

- Name of employer or affiliate

Title* [dropdown]

- Is the team member faculty, a graduate student, a research scientist, visiting faculty, or other?

Title* – Other, Please Specify [text box, max characters allowed: 200]

- If Other was selected as the team member's title, specify what the title is

Email* [text box, max characters allowed: 200]

- Team member's email address

Phone Number* [text box, max characters allowed: 15]

- Team member's phone number

ORCID Identifier [text box, max characters allowed: 16]

- Team member's ORCID Identifier. To learn more about ORCID IDs, or to register for a unique ORCID identifier, please visit this page https://orcid.org

Curriculum Vitae* [upload]

- Upload the team member's curriculum vitae

Citizenship* [radio button]

- Indicate if the team member is a U.S. citizen

Residency* [radio button]

- Indicate if the team has lived in the United States for at least three of the past five years

Special Sworn Status* [radio button]

- Does this person have active special sworn status (SSS) with the U.S. Census Bureau?

Graduation Date* [date]

- Displays only if the team member's title is "Graduate Student"
- When will the team member graduate from graduate school?

Researcher Role on the Project* [text box, max characters allowed: 200]

- Displays only if the team member's role is "Researcher"
- What role will the researcher have on the project?

Data Access* [radio button]

- Will this person access the data listed under "Data Selected" in the sidebar of this application? Note: Some options may require follow-up with the data provider.
- Select **Yes** if this person will be accessing data or will have access to undisclosed output, which is output that has not undergone any disclosure review.
- Select **No** if this person will not access data and/or undisclosed output and is only supporting the research project in ways that involve access to information that has been cleared for disclosure.
- Note: At least one researcher will need data access for the data requested. "No" cannot be selected for every researcher.

Project Overview

Funding* [text box, max characters allowed: 3800]

- Please list any grants, FSRDC consortium funding, university funding, and any other sources of funding for this project. If none, enter "None."

Timeline* [upload]

- What is the timeline for completing project tasks? The document linked below should be used as an example of the level of specificity and format preferred.
- Projects that use data from the U.S. Census Bureau are required under Title 13, U.S.C. to contribute to the Census Bureau's mission.
- These contributions are called "benefits." The development of the timeline requires linking Census benefits to each of the project activities. Assistance from an FSRDC administrator will greatly reduce the need for future revisions to the timeline after submission. To find an FSRDC administrator near you, please check the list of FSRDC contacts. If you are unsure which FSRDC to contact or have a general question, please reach out to the Census Bureau at ced.fsrdc.info@census.gov.

Note: A Project Timeline Template is provided and can be downloaded.

Research Question* [text box, max characters allowed: 3800]

- What is the proposed research question?

Demonstrated Need* [text box, max characters allowed: 10000]

- Explain why the research questions can only be addressed using the requested restricted-use microdata. Be as specific as possible, including listing key variables or methodological advantages of the restricted file compared to a public-use file (where available).

Study Population* [text box, max characters allowed: 10000]

- Briefly describe the study population or universe and how it relates to the research question.

Project Abstract* [text box, max characters allowed 3800]

- Provide a project abstract of approximately the length that would be published for a journal article. The abstract should broadly describe the purpose of the research, the type of data to be used, and the hypotheses to be tested.

Data Units, Linkages, User-Provided Data

Variables Requested* [upload]

- If you are requesting data from the National Center for Health Statistics (NCHS), Substance Abuse and Mental Health Services Administration (SAMHSA), the Census of Agriculture from the National Agricultural Statistics Service (NASS), or Economic Research Service (ERS), please upload a data dictionary indicating which variables you will need to access following the instruction on their pages: NASS, NCHS, SAMHSA, and ERS. If you are requesting the Census of Agriculture, please email the completed spreadsheet to SM.NASS.Data.Lab@usda.gov with your SAP application number.

Data Linkages [upload]

- Discuss data linkages planned for the research, if any. Please specify datasets to be linked, whether linkages are at the record level (e.g., person, household, business), the purpose of the linkage (e.g., geographic/industry context), and provide basic information on how the linkages are to be performed. Expected length, for projects including linkages only: 2-5 pages.

User-provided Data **Select “Add user- provided data”**

- If you are planning to provide other data for use in this project, please describe those data below. Enter information about one dataset at a time, using the “Add User-provided Data” button to include additional sources.

Note: If the applicant adds user-provided data, the following questions will appear:

- Name and Description of Data [text box, max characters allowed: 200]
  - Provide the name of the dataset, a brief description of its contents, and the approximate size of the file.
- Ownership [text box, max characters allowed: 200]
  - Please indicate whether these data are publicly available or proprietary and provide the source (including URL, if applicable) from whom you obtained the data.
- Anonymized [yes/no/ don’t Know]
  - Will personal identifiers be removed – that is, will the data be anonymized?
- Linkage [yes/no/ don’t Know]
  - Will you be linking these to other data at the record (e.g., person, household, business) level?
- Protected Identification Keys (PIKs) [yes/no/ don’t Know]

- Will you require Census protected identification keys (PIKs) to be applied to these data in order to link to other Census Bureau data?
- *Note: This question only appears for Census data.* Software Requirements [text box, max characters allowed: 200]

Census Benefits*

- Projects that use data from the U.S. Census Bureau are required under Title 13, U.S.C. to contribute to the Census Bureau's mission. These contributions are called "benefits." List each proposed criteria, explaining how the benefit will be achieved. The development of Census benefits that will be accepted during the application review process can be challenging for many researchers. Assistance from an FSRDC administrator will greatly reduce the need for future revisions to your benefit statements after submission.
- Assistance from an FSRDC administrator will greatly reduce the need for future revisions to your benefit statements after submission. To find an FSRDC administrator near you, please check the list of FSRDC contacts. If you are unsure which FSRDC to contact or have a general question, please reach out to the Census Bureau at ced.fsrdc.info@census.gov. (List of the criteria with details about each is provided within the application.)
- Select a Criterion [drop-down]
  - Criterion 1: Evaluating Concepts/Practices
  - Criterion 2: Increase relevancy of trends
  - Criterion 3: Developing utilities
  - Criterion 4: Enhancing administrative functions
  - Criterion 5: Improving quality of data
  - Criterion 6: Improving methods for data collection
  - Criterion 7: Enhancing data usage lifecycle
  - Criterion 8: Improving underlying classification schemes
  - Criterion 9: Identifying further data needs
  - Criterion 10: Improving sampling frames
  - Criterion 11: Describing population
  - Criterion 12: Improving survey estimates
  - Criterion 13: Developing statistical weights
- Criterion Description *[text box, max characters allowed: 10000]*

Agency Benefits* [text box, max characters allowed: 10000]

- This question is required by the agencies listed below. Failure to answer this question could delay the determination of your application.
  - The Bureau of Economic Analysis
  - The National Center for Health Statistics
  - The Bureau of Labor Statistics
  - The Statistics of Income Division of the Internal Revenue Service
- List the benefits to the agency from whom the data are being requested, explaining how the proposed work will achieve those benefits. Please click the link below to view specific guidance provided by the above agencies.
- Guidance for completing this question is linked within the application.

Methodology, Products and Outputs

Methodology* [upload]

- Explain the methodology that will be used for the project. The methodology should be clearly stated and appropriate for the research questions. The metadata catalog, agency publications and statistical products, agency web pages describing the restricted access data, and agency contacts are valuable resources for background information for drafting a strong methodology. Expected length: 3-10 pages.
- Your methodology may include, but is not limited to the following information, as appropriate
    - How each requested dataset will be used
    - Model equations to be estimated
    - Estimation methods
    - How previous research supports the feasibility of the methodology of the project
    - How model variables will be constructed
    - Strategies for addressing data quality issues
    - Expected sample size and subsamples
    - Unit of analysis including level of geography
    - Ability to link datasets
    - Availability of the study population in the data
    - Use of sample weights, design variables, and adjustments for use of complex survey design
    - Expected outcomes
- Projects that use data from the U.S. Census Bureau are required under Title 13, U.S.C. to contribute to the Census Bureau's mission.
    - These contributions are called "benefits." Your proposed methodology must demonstrate that the use of the data can achieve the required Census benefits. Assistance from an FSRDC administrator will greatly reduce the need for future revisions to your methodology after submission. To find an FSRDC administrator near you, please check the list of FSRDC contacts
    - If you are unsure which FSRDC to contact or have a general question, please reach out to the Census Bureau at ced.fsrdc.info@census.gov.

List of References* [upload]

- List any publications referenced in this application as well as any other works that are of importance to this project.
    - Expected length: 2-5 pages.

Project Products* [text box, max characters allowed: 3800]

- What are the anticipated journal articles, books, working papers, conference presentations, technical memoranda, dissertations, government reports, or other products for this project? Please include the names of journals.

Requested Output* [upload]

- Describe the anticipated output for this project, including regression/modeling output, summary statistics, and any other output you intend to submit for disclosure review as well as anticipated

methods to meet disclosure requirements (e.g., noise infusion). Please check with the agency contact if you are unsure of the agency's output and disclosure requirements.
    - For modeling output include descriptions of the samples you anticipate using and variables you plan on reporting results on, including descriptions of categorical variables.
    - For tabular output, describe the output needed for the project products in detail, including examples when applicable (i.e., state groupings, levels of output and how you will display restricted-use data, analytic methods to reduce disclosure, etc.).
- Each agency will assess this section based on its disclosure requirements. Some agencies' disclosure requirements only allow for projects that emphasize regression/modeling output and a limited number of summary statistics that support this output, while others require table shells of requested output be included in the application. (Expected length: 2-15 pages).

Additional Documents *[upload]*

Additional documents may be required depending on the data selected. These are typically presented for download, completion, and [upload]. If additional documents are required, these will appear in your application in the "**Additional Documents**" section.

Some documents, such as IRB approval or security plans, may be requested by the data owners upon approval of the application.

BJS:

- Pre-approval documentation: Pre-approval documents include IRB determination documentation, NACJD Restricted Data Use Agreement, and a fully executed BJS Privacy Certificate. These documents are required to ensure that users of BJS restricted data will comply with applicable federal requirements concerning the protection of human subjects and the confidentiality of information identifiable to a private person, consistent with the regulations at 28 CFR Part 46 and 28 CFR Part 22. These documents must be submitted before an approval can be issued in the SAP.

Census:

- FSRDC Access Confirmation Form: Agency requirement - Used to ensure that the FSRDC location is aware of the potential project and to ensure that the FSRDC administrator has the opportunity to provide information on any fees and to give guidance on proposal and SSS requirements.

NASS:

- MOU NASS: The MOU form must be signed at the time of application submission to ensure the project is supported and the institution has agreed to accept and enforce the responsibilities associated with using restricted microdata.
- MOU NASS-ERS: The MOU form must be signed at the time of application submission to ensure the project is supported and the institution has agreed to accept and enforce the responsibilities associated with using restricted microdata.
- MOU NASS-NAHMS: The MOU form must be signed at the time of application submission to ensure the project is supported and the institution has agreed to accept and enforce the responsibilities associated with using restricted microdata.

Appendix B: SAP Standard Review Criteria

The SAP policy (M-23-04), section 4.1, establishes the standard review criteria. These are summarized below. To view the full criteria, please refer to M-23-04. When reviewing applications, agencies **must use** the standard review criteria as outlined in M-23-04. Agencies may take into account other considerations only where required by law or regulation.

Statistical Purpose:

- Your project must use the data for statistical purposes. This means you'll use the data to describe or understand groups of people or things, without identifying individual people or businesses.
- Examples of things that are not statistical purposes include using the data for law enforcement, legal cases, or regulatory actions.

Allowed Use:

- How you plan to use the data must match any rules or restrictions that apply to it. These rules might come from promises made to those who provided the data, or from laws.

Statistical Disclosure Limitation:

- You must be able to use techniques that protect the privacy of individuals, organizations, or businesses. These techniques reduce the risk of someone being identified from the data.

Demonstrated Need:

- You must show that you need to use confidential data to achieve your project goals. You must also show that public data isn't enough to do what you need to do.
- This helps explain why it's worth taking the risk of sharing confidential data.

Feasibility:

- You must show that you can achieve your project goals with the confidential data you're requesting.
- Agencies will look at these things:
    - Project Design: This includes your methods, technical details, computer needs, whether you have space to work, logistics, and how long the project will take. You must provide enough information about your methods.
    - Agency or Unit Support: This means checking if the agency can support your project, including things like space, technical help, logistics, and if the data can be prepared in time.
    - Applicant Ability: This means checking if you have the knowledge, skills, and abilities to do the project. You must provide enough information about your qualifications.

Maintaining Public Trust:

- Agencies will check if your project helps them keep the public's trust and confidence.
- If a project could harm the agency's ability to do its job or collect data, it may be rejected.

To ensure that review criteria remain standardized across statistical agencies and units, additional review criteria are only permissible when necessary to meet agency or dataset legal or regulatory requirements. These may include:

- **Programmatic benefit**: Project proposals must define contributions to the program under which the confidential dataset was collected. (For example, access to confidential Census Bureau Data may only be granted if the proposal provides a benefit to the Census Bureau's Title 13 programs.)
- **Additional criteria**: This applies only when the additional criteria are deemed necessary based on a statutory authority or regulatory requirements applicable to the data collection or the statistical agency or unit. This may vary by agency according to statutory or legal requirements.