Understanding Investigators/Research Team

To build a Research Team, use the Add Personnel Information section to add people to the proposal with the appropriate roles and effort. Fill out the required fields before saving. Required fields are marked with a red asterisk.

Adding a Person

1. To add a person, click the magnifying glass next to Last Name. This brings up a window where you can search for the person by last name.

2. When you find them, click on their name to fill their information into the fields.

3. The Unit field will automatically fill with the person's home unit, but if you need to assign them to another unit for this work, you can use the search to search for and select a different unit from the list that pops up.

4. You can filter the list by entering the Unit Code (Org) or the Unit Name (Department) into the empty fields at the top of the pop-up.

5. Add the effort information:

   - **Sponsored Effort %**: The individual's total effort in the initial or current budget period. Enter "0" (zero) if this figure does not apply.

   - **Cost Shared Effort %**: The portion of the individual's total effort that will be cost shared. If the proposal does not make use of cost shared effort, you may leave this field blank.

   - **Allocation of Credit %**: This field should be used in accordance with your institutional policy regarding allocating credit. One common use is that the unit F&A return will be distributed per the allocation of credit. If your institution does not use this field, you may leave it blank.

   - **Person Months**: The individual's involvement in Person Months. Enter "0" (zero) if this figure does not apply.
6. Select a Role

- **Lead Principal**: The first person to be added as the person responsible for the technical, regulatory and financial aspects of the project. There should be exactly one Lead PI on the proposal at all times. Other Investigators may have the Principal Investigator or Investigator roles.

- **Investigator**: This individual is considered to be a primary contributor to the successful conduct of a research project; any person who is responsible for the design, conduct, or reporting of research.

- **Principal Investigator**: This role should only be selected if the sponsor allows multiple PIs. Other roles that may fall under this designation include Research Scientist, Research Specialist, Research Associate, or Scholar.

- **Postdoctoral Research Associate**: This individual has received a doctoral degree and serves on the research project.

- **Project Manager**: An individual is identified in this role on a limited basis such as on program project grants or on a clinical trial.

- **Technical Staff**: This individual performs standardized or routine measurements, analyses, or procedures in support of the research project.

- **Proposal Editor**: Grants simultaneous permissions equal to the Proposal Creator in the SP record and 424 record.

- **Other Key Participant**: This designation accommodates project participants whose role title differs from those above. After selecting Other Key Participant, a field labeled "Role Title" appears beneath the Role. Enter the participant's custom title into the Role Title field. The participant's unit will be included in the routing list on the Approving Unit's screen.

- **Other Participant (no routing)**: This designation serves the same purpose as Other Key Participant, except that the participant's unit is excluded from the routing list on the Approving Units screen.

7. Click **Save Personnel** to add the person to the proposal. Subsequent people can be added with other roles.

**List of Personnel**

This area shows personnel who have already been added. Click Edit to make changes to a person's entry, or Remove to remove them from the proposal.

Personnel with the Lead Principal Investigator and all Principal Investigator roles will receive an electronic notification to certify their role on this project prior to submission to the sponsor.