

Personnel Tab – Begin Typing in Box to Select Personnel Name

Setup Questions

Brief Lay Summary

Research or Program Plan

Personnel

Budget

Classification Codes



New / Competitive Renewals / ...

Internal Documents

Finalize







Personnel

Add Personnel [hide]

Proposal Element  
Prime

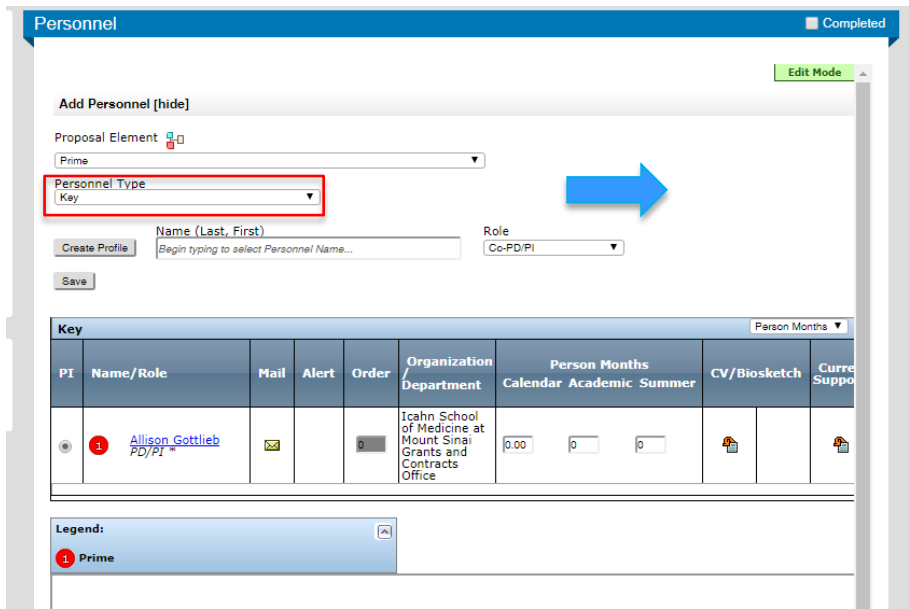
Personnel Type
Key

Create Profile Role
 Co-PD/PI

Key										Person Months	
PI	Name/Role	Mail	Alert	Order	Organization / Department	Person Months			CV/Biosketch	Current/Pending Support	Remove Person
						Calendar	Academic	Summer			
<input checked="" type="radio"/>	 Allison Gottlieb PO/PI *				Icahn School of Medicine at Mount Sinai Grants and Contracts Office	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>			

Personnel Tab – Default Set to Key Personnel

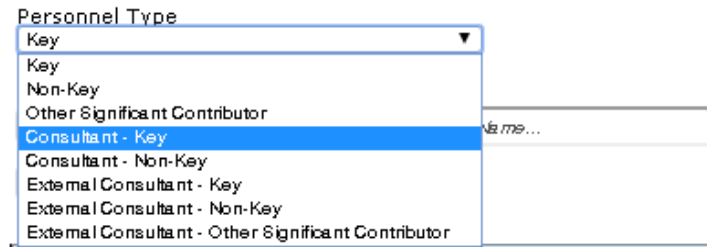
When adding personnel, change the default from key to another option when appropriate. Always click on the “Save” button to save changes.



The screenshot shows the 'Personnel' tab interface. At the top, there is a 'Completed' status indicator and an 'Edit Mode' button. Below this is the 'Add Personnel [hide]' section, which includes a 'Proposal Element' dropdown set to 'Prime', a 'Personnel Type' dropdown set to 'Key' (highlighted with a red box), a 'Name (Last, First)' text field with a placeholder 'Begin typing to select Personnel Name...', and a 'Role' dropdown set to 'Co-PD/PI'. There are 'Create Profile' and 'Save' buttons. A blue arrow points from the 'Personnel Type' dropdown to the right. Below the form is a table of existing personnel, with the first row highlighted. The table has columns for PI, Name/Role, Mail, Alert, Order, Organization/Department, Person Months (Calendar, Academic, Summer), CV/Biosketch, and Current Support. The first row shows a personnel member named Allison Gottlieb, PD/PI, with a red circle containing the number 1 next to her name. Below the table is a legend section with a red circle containing the number 1 next to the word 'Prime'.

PI	Name/Role	Mail	Alert	Order	Organization/Department	Person Months	CV/Biosketch	Current Support			
Calendar	Academic	Summer									
1	Allison Gottlieb PD/PI	✉		0	Icahn School of Medicine at Mount Sinai Grants and Contracts Office	0.00	0	0			

Legend:
1 Prime



The screenshot shows a dropdown menu titled 'Personnel Type'. The menu is open, showing a list of options. The 'Consultant - Key' option is highlighted in blue. The options are: Key, Key, Non-Key, Other Significant Contributor, Consultant - Key, Consultant - Non-Key, External Consultant - Key, External Consultant - Non-Key, and External Consultant - Other Significant Contributor. To the right of the dropdown, there is a text input field with the placeholder text 'Name...'.



Personnel Tab – “Create Profile” is Only for New TBNs and TBDs

Only use this Create Profile feature to create new “to be named” positions. Begin typing to see if your “TBN” or “TBD” is already there. To add any new TBN or TBD positions or to add new personnel, please follow the standard process of opening up an InfoEd Ticket > Help Topic: InfoEd / New Personnel Request.

Policy Reminder!
For applications that do not require a budget tab, you can omit non-key personnel, TBN positions and consultants.

Personnel

Add Personnel [hide]







Proposal Element  
Prime

Personnel Type
Key

Create Profile Name (Last, First) Role
Begin typing to select Personnel Name... Co-PD/PI

Save

Key Person Months ▼

PI	Name/Role	Mail	Alert	Order	Organization / Department	Person Months			CV/Biosketch	Current/Pending Support	Remove Person
						Calendar	Academic	Summer			
<input type="radio"/>	 Allison Gottlieb PD/PI *				Icahn School of Medicine at Mount Sinai Grants and Contracts Office	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>			

Personnel Tab – Subaward Personnel


1. Proposal Element

Proposal PD17-03922 **test** Jorge Lopez - Test Department (National Institutes Of Health/DHHS)

Done Save

Personnel Completed

Add Personnel [hide] Edit Mode

Proposal Element  **1**

Prime

Personnel Type Key

Create Profile Name (Last, First) Role Co-PD/PI

Save

Steps to Add A Subaward with Personnel

1. Click on Proposal Element icon.
2. Click on Add Subaward Link.
3. Type in Name of Subaward.
4. Select Subaward Name.
5. Click on Select Subaward.
6. Type in Subaward PI first.
7. Select Subaward PI.
8. Click Continue.

Budget Structure Master/Child Structure Save Close

Institution Element Number	Project ID	Organization	PI	Department	Associated Budget/Award Increments			Active	Add Element	Remove
					Period	Type	Start Date			
Prime	PD17-03922	Icahn School of Medicine at Mount Sinai	Lopez, Jorge	Test Department	Requested Period 1	NOT THIS ONE *	20-Oct-2017	<input checked="" type="checkbox"/>	Add Subaward	Add Subaward
					Requested Period 2	NOT THIS ONE *	20-Oct-2018	<input checked="" type="checkbox"/>		

2

Select SubAward Proposal Structure

Regents **3** Select Subaward **5**

- Regents of the University Of New Mexico
- Regents of the University of California, Berkeley **4**
- Regents of the University of California, Davis
- Regents of the University of California, Irvine
- Regents of the University of California, Los Angeles
- Regents of the University of California, Riverside
- Regents of the University of California, San Diego
- Regents of the University of California, San

Select SubAward Select Subaward

Begin typing to select Subaward Institution Name...

Select PI **6**

- Harris, Eva - Infectious Diseases and Vaccinology
- Hellerstein, Marc - Nutritional Science & Toxicology
- Jagust, William - Neuroscience
- Metayer, Catherine - Epidemiology Biostatistics **7**
- Nyangau, Edna - Nutritional Science & Toxicology
- Pennacchio, Len - Genomics Division
- Shaw, Gary - California Birth Defects Monitoring Program



to Period

Continue **8**



Personnel Tab – Subaward Personnel (continued) 2.

SubAward: SUB17-0841
 Prime
 SubAward: SUB17-0841

Now that you've added the subaward institution and the subaward PI ...



Proposal Element  

Budget Structure 9 Master/Child Structure Save Close

Element	Institution Number	Project ID	Organization	PI	PI Department	Associated Budget/Award Increments				Add Element	Remove
						Period	Type	Start Date	Active		
Prime	PD17-03923	1	Icahn School of Medicine at Mount Sinai	Gottlieb, Allison	Grants and Contracts Office	Requested Period 1	NOT THIS ONE *	01-Dec-2017	<input checked="" type="checkbox"/>	Add Subproject Add SubAward	
SubAward	SUB17-0841	2	Albert Einstein College of Medicine, Inc	Smith, Tracey	Biochemistry	Requested Period 1	NOT THIS ONE *	01-Dec-2017	<input checked="" type="checkbox"/>	Add SubAward	

Policy Reminder!
 Do Not Add a Subaward on a Subaward.

Add Personnel [hide]



Proposal Element  

SubAward: SUB17-0841 10

Personnel Type Key 11

Create Profile 12 Role 13 Co-PD/PI

Save 13

PI	Name/Role	Mail	Alert	Order	Organization / Department	Person Months			C
						Calendar	Academic	Summer	
1	Allison Gottlieb PD/PI**			<input type="checkbox"/>	Icahn School of Medicine at Mount Sinai Grants and Contracts Office	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	
2	Smith, Tracey Subaward PI			<input type="checkbox"/>	Albert Einstein College of Medicine, Inc Epidemiology and Population Health	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	

Legend:

- 1 Prime
- 2 SubAward - SUB17-0841 (Smith, Tracey)

9. You'll see the subaward added in the "Budget Structure" section.
10. Add staff to the subaward "SubAward: SUB..." It is now set as the default. Make sure to select it from the drop down if you are adding subaward personnel at a later time.
11. Choose appropriate "Personnel Type" from drop down menu, begin typing name in the "Name" field and select "Role."
12. Choose appropriate role and personnel type.
13. Click on "Save."