Adding Personnel to a Proposal

These instructions tell you how to add personnel to a proposal.

Some of the personnel that you add to a proposal will appear under that proposal’s Budget section.

You add all personnel using the Personnel Wizard. This is true whether you are adding a key person, non-key person, subcontractor, or consultant.

Estimated Time to Complete

5 to 10 minutes per person.

Prerequisites

You will need to know each person's full contact information, which includes:

- First name
- Last name
- Title
- Address
- City
- State
- Zip
- County
- Country
- Phone
- Fax
- Email
- Institution
- Department
- Phone
- Fax
- Email

For key persons, you will also need their eRA Commons User Name and CV in PDF format.

Instructions

1. From the menu bar on the left side of the page, click Personnel. You will see that the PI has already been added to the personnel on this proposal:

   ![Personnel Wizard screenshot]

   **Key:**
   - **Name/Role:**
   - **% Effort/Period:** 1.00 1.00 1.00 1.00 1.00
   - **Order:** 1
   - **Organization/Department:** Mount Sinai School of Medicine of Icahn Training Department
   - **PI:**
   - **Support:**
   - **Complete:**

   2. Add all research personnel.

   3. Choose a role for each personnel member. If the correct role is not in the list, select "Other (Specify)" and manually enter the role needed.
Add a Person Using the Personnel Wizard

1. Click the Personnel Wizard button. InfoEd launches the wizard in a new window:

2. The Personnel Wizard will ask a series of questions about the person you are adding to the proposal. Your answers will change based upon the type of personnel that you are adding. For each type of personnel, the table on the next page shows you the questions and answers you should choose.

The page where you obtained this document also contains short screen movies that demonstration using the Personnel Wizard.
<table>
<thead>
<tr>
<th>Question</th>
<th>Current Employee</th>
<th>To Be Hired, Name is Known</th>
<th>To Be Hired, Name is Unknown</th>
<th>Subcontractor</th>
<th>Consultant</th>
</tr>
</thead>
<tbody>
<tr>
<td>Is this person appointed to your institution, or will they be if they are not hired or identified yet?</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Will this person be a part of a subcontract on this proposal?</td>
<td>(skipped)</td>
<td>(skipped)</td>
<td>(skipped)</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Please select the institution from this list.</td>
<td>(skipped)</td>
<td>(skipped)</td>
<td>(skipped)</td>
<td>Select institution from drop-down list.</td>
<td>Select institution from drop-down list.</td>
</tr>
<tr>
<td>Does this person currently work at your institution?</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>(skipped)</td>
<td>(skipped)</td>
</tr>
<tr>
<td>Is this person &quot;named&quot; or will they be determined later (TBD)?</td>
<td>(skipped)</td>
<td>Named</td>
<td>TBD</td>
<td>(skipped)</td>
<td>(skipped)</td>
</tr>
<tr>
<td>Department</td>
<td>(skipped)</td>
<td>(skipped)</td>
<td>Set the department.</td>
<td>(skipped)</td>
<td>(skipped)</td>
</tr>
<tr>
<td>Please Select the &quot;Personnel Type&quot; for this person on this proposal.</td>
<td>(skipped)</td>
<td>(skipped)</td>
<td>Select anything except Key. NIH rules prohibit a key person from being To Be Determined.</td>
<td>Key will be selected for you. Here in the personnel section, you enter the PI for the subcontractor, who is of course, Key. Later in the Budget section you will add any other personnel for the subcontractor.</td>
<td>Select from the choices given.</td>
</tr>
<tr>
<td>Last step...</td>
<td>Select the employee from the pick list.</td>
<td>Enter the name of the person you wish to add. Select the Department from the drop-down list.</td>
<td>Fill out the information for the person, using our institution's contact information.</td>
<td>Fill out the contact information for the subcontractor PI.</td>
<td>Fill out the contact information for the consultant.</td>
</tr>
</tbody>
</table>
For Key Personnel, Check the Department
For all MSSM Affiliates, key personnel (the PI, Co-Investigators, and anyone else who is Key) need to have Mount Sinai departments. For a key person’s department, do not select Queens Hospital, Elmhurst, or the Bronx VA.

After you add a person using the Personnel Wizard, you will be taken to that person's Contact Information window. In this window, ensure that the person’s department is correct. In the example below, you can see the department needs to be changed, because it is set to Queens Hospital Center:

To change a person’s department in the Contact Information window:

1. Next to Department, click the Set link.
2. A popup window is displayed, listing the departments and institutes.
3. Select the first letter of the department.
4. Scroll down and find the department in the list.
5. Select the radio button next to the department.
6. Scroll back up to the top of the page.
7. Click the Select button.
8. You are returned to the Contact Information window. Give the window time to refresh, and check the department.
9. Click **Save** and **Close** to return to the Personnel tab.

### If Necessary or Desired, Upload CVs

1. **If a CV is required** for a person, InfoEd will indicate that in the column labeled **CV Required:**

2. **Click the upload icon:**

   ![CV Required Icon](image)

If a CV is not required but you still want to upload one, click the check box under **CV Required:**
3. At the bottom of the page, click the **Browse...** button. A File Upload dialog box is displayed:

![File Upload Dialog Box](image)

4. Select the file to upload.

5. Click the **Open** button. The File Upload dialog box closes and you are taken back to the Personnel page.

6. Click the **Upload** button. The CV is uploaded to the person's line. You can check the file by clicking on the Acrobat icon:

![Acrobat Icon](image)

Repeat these steps as needed, using the Personnel Wizard to add persons and uploading their CVs as needed or desired. When finished, click the Complete check box in the upper right corner.

**Next Steps**

Check under **Budget > Budget Items** to see if any of the personnel you added have a line item in your budget. If they do, you'll need to add salary and time-and-effort information to their line item. See the document *Budget: Personnel Line Item.*