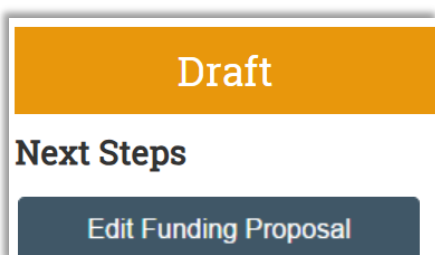




Managing Personnel

Proposals

1. From the proposal workspace navigate to the Personnel SmartForm by selecting Edit Funding Proposal. Edit access is available when the proposal is in the Draft state or when changes have been requested.



2. Add project personnel by selecting + Add.

3. Project personnel:

a. Other than the Principal Investigator, select all institutional personnel to be involved in the project.

+ Add

Last Name	First Name	Key	Role	Biosketch
Test	SSO	yes	Co-PD/PI	

Update

3. Complete the required fields. Provide a name and select a project role. Indicate if the individual is senior/key, other significant contributor, or other personnel.

Add Institutional Proposal Staff

1. * Select Personnel:

2. * Select project role: ?

3. Attach a biographical sketch:

4. Attach current and pending support documentation:

5. * This individual is a:

☐ Senior / key person on the proposal

☐ Other significant contributor on the proposal

☐ Other personnel

New Awards

1. From the award workspace navigate to the Personnel SmartForm by selecting Edit Award. Edit access is available when the award is in the Draft state or when changes have been requested.

Draft

Next Steps

Edit Award

2. Review the personnel that have mapped from the funding proposal to the award. Select the Edit icon to update the role and Senior/Key tags. Select + Add to insert new personnel. Select X to remove personnel.

Personnel

1. Award Personnel: ?

Name	Role	Senior / Key
Eric Larson	PD/PI	yes

Requesting Award Personnel Modifications (Department)

1. From the award workspace select the Request Award Modification activity.

Request Award Modification

2. Select the Personnel Change modification type.

3. Select Modification Type: ?

- ☐ Revision | Supplement
- ☐ No Cost Extension
- ☐ Re-budget
- ☐ Carryover
- ☐ NGA Revised
- ☐ Early Termination
- ☐ Financial Account Change
- ☒ Personnel Change
- ☐ Sponsor Change
- ☐ Other Changes (T&C, Compliance Update, etc.)
- ☐ Demographic Changes Only

3. Note the change in the comment box.

4. * Comments for OSP Specialist (if none, enter N/A):

Add Dr. Jane Smith (Dept number) as co-investigator. This is a senior/key personnel. Remove Dr. Robert Jones (Dept number) as co-investigator, who was senior/key personnel.

Creating Award Personnel Modifications (OSP and Department)

1. From the award workspace OSP will select the Create Award Modification activity.

Create Award Modification

2. Select the Demographic Changes Only modification type.

4. * Select Modification Type: ?

- ☐ Revision | Supplement
- ☐ No Cost Extension
- ☐ Re-budget
- ☐ Continuation
- ☐ Carryover
- ☐ NGA Revised
- ☐ Budget Allocation Correction
- ☐ Early Termination
- ☒ Demographic Changes Only

3. Select Personnel Change.

5. Select demographic changes: ?

- ☐ Financial Account Change
- ☒ Personnel Change
- ☐ Sponsor Change
- ☐ Other Changes (T&C, Compliance Update, etc.)

4. OSP will notify the department that the modification has been created. The department will make updates on the Personnel Changes SmartForm. Select + Add to enter personnel. Select X to remove personnel. Department will use the Send Email activity to notify OSP after the changes have been made.

Personnel Changes

1. * PD/PI:

Eric Larson

2. Award Personnel:

Name	Role	Senior / Key	
Eric Larson	PD/PI	yes	Edit <input checked="" type="button" value="X"/>