

# Adding to the Rolodex



## How can I add non-JHU personnel to my PD if they don't show in the Non-employee Search?

You can add a **non-JHU employee investigator** or a **non-JHU employee key person** to your proposal from the Rolodex. In order to reduce the number of duplicate entries in the Rolodex, please perform a search for the person and/or the organization to see if an entry for them already exists. If not, you can add the person and their information to the Rolodex.

Rolodex entries cannot be edited once they are used in or linked to a Coeus proposal development record.

**Before you add a name**, be sure to search the Rolodex to determine if the name is already in it. This saves you time, and avoids adding redundant information to the database.

1. Click on **<Add New Rolodex Entry>**, found in the menu on the left side of the screen while in the Proposal Development record.

The screenshot shows the 'Add New Rolodex Person' form. At the top, there are navigation tabs: 'All Proposals', 'Proposals In Progress', 'Create New Proposal', 'Proposal Search', and 'Grants.gov Opportunity Search'. Below these, there's a header with 'Investigator: Gasior, Angela', 'Agency/Sponsor: 303063 : DUKE UNIV', 'Title: Test Proposal for Training in Coeus PRemium', 'Proposal #: 00156322 (In Progress)', and 'Proposal Period: 10/02/2021 - 10/02/2025'. The main form area is titled 'Add New Rolodex Person' and includes a note '\* Indicates Mandatory Fields'. The form prompts the user to 'Please enter new rolodex information.' and contains various input fields: First Name, Last Name, Middle Name, Suffix, Prefix, Title, Sponsor, Organization (with a search button), Address, Country (dropdown menu), State (dropdown menu), Postal Code, City, County, Email, Phone, and Fax. There are radio buttons for 'Active' and 'Inactive'. A 'Comments' text area is at the bottom. A 'Save' button is located at the bottom left of the form. On the left side of the screen, there is a sidebar menu with options like 'Proposal Summary', 'General Info', 'Organization', 'Investigators/Key Persons', 'Special Review', 'Others', 'Proposal Roles', 'Questionnaire', 'Budget', 'Upload Attachments', 'Submit for Approval', 'Delete Proposal', 'Copy Proposal', 'Email', 'Add New Rolodex Entry >>', and 'ORIS Proposal Summary Form'.

2. Enter the required fields: Both **Organization** and **State** are required.
3. Select **<Save>**.



After saving, you'll be provided with the new Rolodex ID:

**Add New Rolodex Person**  
\* Indicates Mandatory Fields

- Your previous entry has been added to the rolodex. (Rolodex ID was 23102)
- Please enter rolodex information for your next entry.