



# Adding Key Personnel to a Proposal

*How do I add Key Personnel to a Proposal Development record?*

- ❑ Click on **EMPLOYEE** or **NON-EMPLOYEE** as appropriate. Employees are JHU Faculty and Staff. Non-Employees are personnel from other organizations.

- ❑ Enter all or part of the persons last name or JHEDID (for JHU employees). The flexible search will show names which contain your search terms in the JHEDID and Last Name. Names will begin to appear in the dropdown menu. Choose the appropriate name. See example below:

- **If an Employee (JHU personnel)** needed does not show, they are not in SAP. In the case of new employees, you may need to reach out to your HR contact and request a mini master.
- **If a Non- Employee (non JHU personnel)** needed does not show in the dropdown menu, you can add a new person to the Rolodex/Address Book:

- ❑ Click on the **Add to Address Book** link [+ Add to Address Book](#)

- ❑ Complete as many fields as possible in the box that opens:

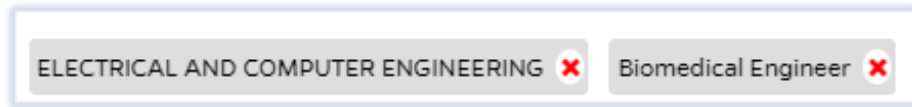
- ❑ If the Organization does not previously exist in the Rolodex, the user must click on **Add "name."**

- ❑ Click on the **Save** button .

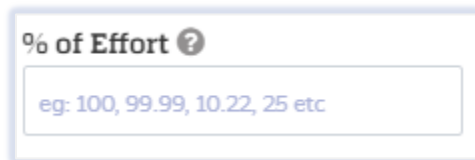
- ❑ Click on **--Select--** in the Role field and choose the appropriate title from the dropdown menu. If **Other** is chosen, a new field will open and the user can enter the role.

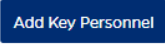
- ❑ Input additional **Department(s)** if needed. Occasionally, faculty have a dual assignment.

- ❑ The **Department** can also be deleted by clicking on the **red X** next to the name.



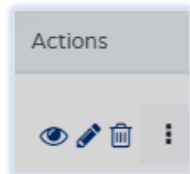
- ❑ Input the **% of Effort**.



- ❑ Click on **Add Key Personnel** button  and the name and information will display in the chart below where information is input.

Name	Role	Department(s) / Organization(s)	Designation	% of Effort	Training	Certification	Actions
Guider, Tracey	Lead Principal Investigator	TRANSITION GUIDES	No designation specified	100	Incomplete	Incomplete	
Gasior, Angela	Co-Investigator	RESEARCH PROJECTS ADMINISTRATION	Grants Associate	5	Incomplete	Incomplete	

### Actions column explained:



#### View more details about the personnel

- ❑ Click on the view icon, to see personnel details.



#### Edit role, effort, or Department assignment

If role, effort, or department assignment needs to be corrected:

- ❑ Click on the **Edit** icon under the **Actions** column and make changes.
- ❑ Click on **Update Key Personnel** to save the changes.

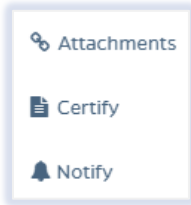


#### Delete Personnel

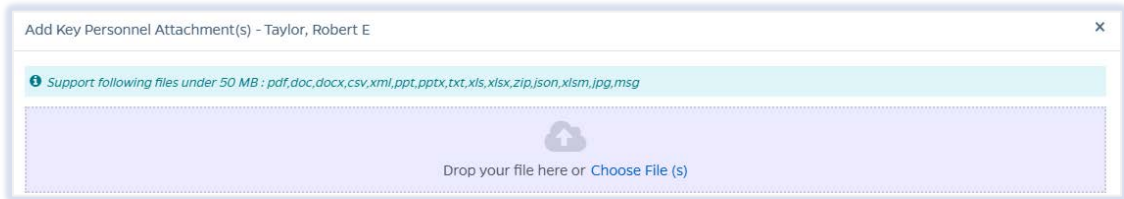
- ❑ Click on the **Delete** icon to remove personnel from the record.



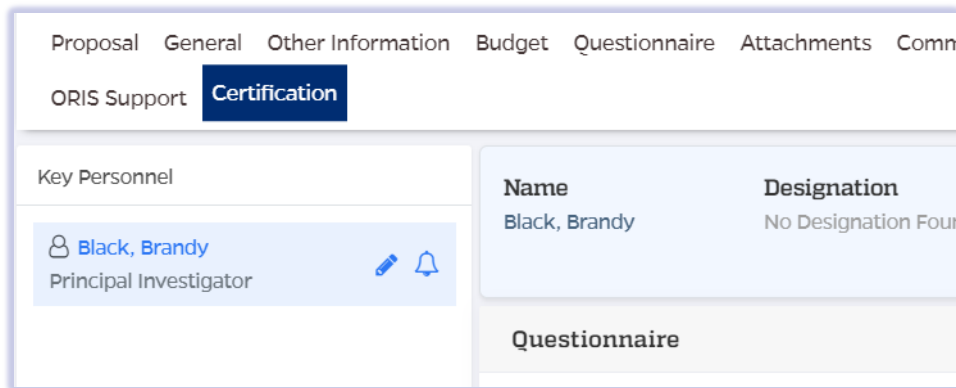
**More Actions** – dropdown menu includes the following:



Click on the **Attachments** icon to add attachments specific to the person.



Click on the **Certify** icon, to navigate to the **Certification** tab.



Click on the **Notify** icon to send an email notification to the person that contains a link to this certification.

