## Adding Key Personnel to a Proposal:

The Key Personnel page is where you identify the Principal Investigator (PI) of the proposal as well as any additional Co-Investigators (Co-I), and project Key Persons (other Key Personnel).

1. To begin, you need to find a specific Proposal Development Document. If it isn't already open, you have to do the following:
   - **Log in to the Kuali Coeus web page**
   - Click on the **Researcher** tab On the Upper Left side of the screen, click on **All my Proposals.**
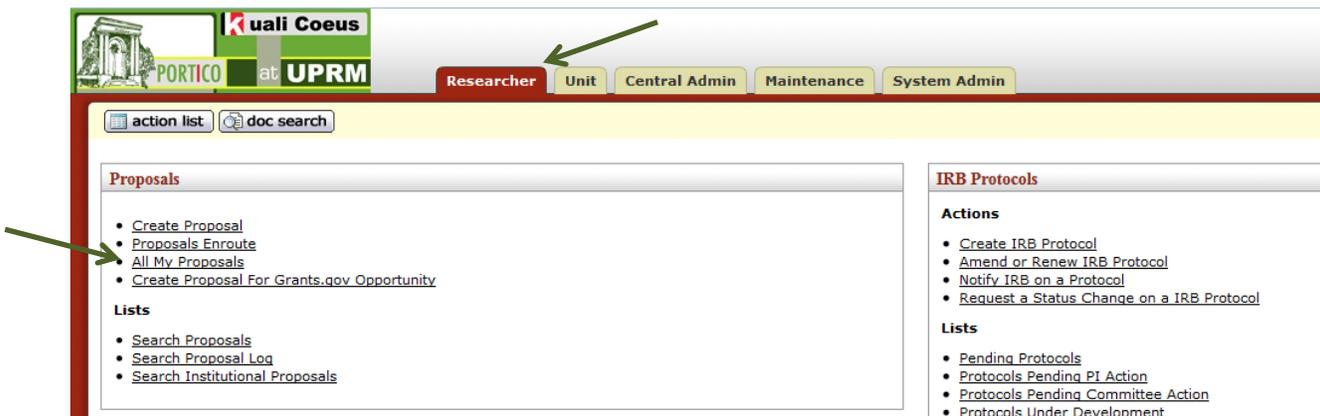
   - The Document Search screen will appear. Your username should appear in the **Initiator** box.

2. Click on **search** to see your Documents:

3. A listing of your documents will appear underneath. Click on the document's **Document Id** number to retrieve a document. The Proposal Development Document will appear.

4. Click on the Key Personnel Tab.

5. The **Add Key Personnel** search selection screen will appear. Click on the magnifying glass next to **Employee Search** to find a University employee.

6. On the KC Person Lookup screen, Enter the search criteria in the corresponding box. It is recommended you place asterisks before and after the data.
   - Use only the english language characters. Don't use characters from another language such as á, é, í, ó, ú or ñ in the spanish language. Instead just use a, e, i, o, u, n.
   - After you enter the data, click on the **search** button.

7. One or more employees whose data corresponds to the search criteria will be retrieved. To select one employee, click on the <u>return value</u> button to the left of the employee's name

8. The corresponding name will be retrieved to the ***Person** box.

9. Click on the arrow to the right of the ***Proposal Role** box and select the correct role for the person: Principal Investigator, Co-Investigator or Key Person.

10. The screen wil look like this:

11. Click on the **Add Person** button and then click **save.**

12. The screen will show the Key Person entry:

Doc Nbr:	3321	**Status:**	In Progress
Initiator:	rafaelo.ruiz	**Created:**	02:02 PM 09/16/2013
Sponsor Name:	Department Of Energy	**PI:**	MAURICIO VASQUEZ SANTAMARIA

Proposal Development Document [?]

| Proposal | S2S | Key Personnel | Special Review | Custom Data | Abstracts and Attachments | Questions | Budget Versions | Permissions |
| Proposal Summary | Proposal Actions | Medusa |

- Document was successfully saved.

expand all   collapse all

* required field
[?]

Add Key Person

*Person: Employee Search 🔍
Non-employee Search 🔍   *Proposal Role: select ▼

clear   add person

Principal Investigator is a required field prior to submission. Only one PI is allowed.

☐ WALTER DE MARIA   Principal Investigator   ▶ show

Combined Credit Split   ▼ hide

Combined Credit Split   [?]

WALTER DE MARIA
RU-ADEM - COLLEGE OF BUSINESS ADMINISTRATION
Unit Total:
Totals
Investigator Total:

recalculate

delete selected   save   reload   close

13. Click on the show button next to the Key Person's name. New tabs will appear.

- **Click on the show button next to Proposal Person Certification and fill the questionnaire; click on save.**

Deleting Key Personnel

1. **To delete a key person**

- **Click on the box next to the name (see below). A check mark will appear.**

- **Click on the delete selection button**

☑ WALTER DE MARIA   Principal Investigator   ▶ show

Combined Credit Split   ▼ hide

Combined Credit Split   [?]

WALTER DE MARIA
RU-ADEM - COLLEGE OF BUSINESS ADMINISTRATION
Unit Total:
Totals
Investigator Total:

recalculate

delete selected   save   reload   close