



**Overview:**

Describes how to add Key Personnel to the proposal, including a Principal Investigator (PI), co-Investigators, and other 'key' persons. Includes special instructions for PI/Multiple (NIH).

**Note:** Principal Investigator must be an active CSU employee located in the Kuali Person table. Non-CSU employees can be Co-Is and Key Persons, but are added only for system-to-system (s2s) proposals.

**Procedure:**

Creating a KR PD record does not automatically add anyone as the Principal Investigator (PI). This is a separate step done in the **Key Personnel** panel, **Personnel** subpanel.

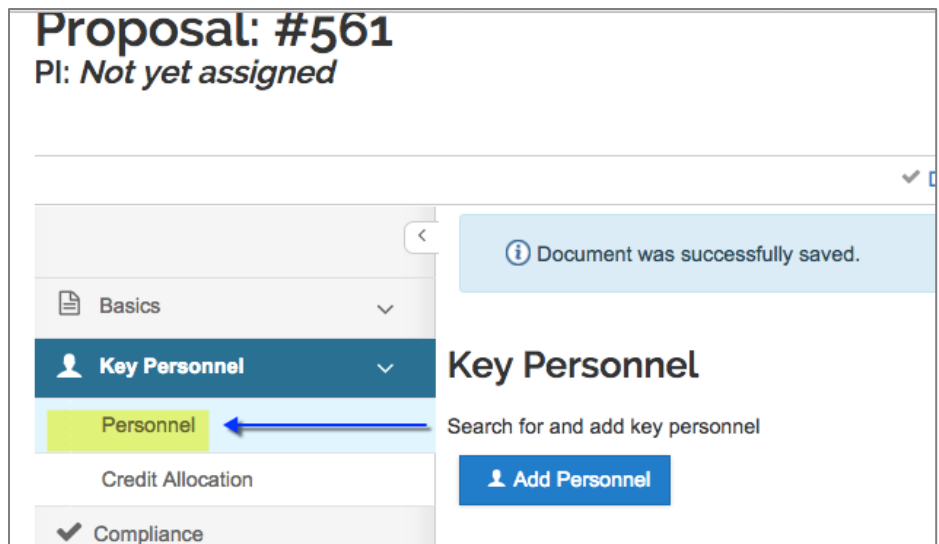
Principal Investigators must be permanent CSU employees. Only one individual may be designated as the Principal Investigator. For most proposals, other 'senior' personnel are added as co-Investigator (CSU considers this 'co-PI'). Collaborators and non-senior key personnel can be added with the Key Person role, which requires the entry of text to describe the person's role on the project (e.g., 'collaborator', 'Other Significant Contributor', 'consultant').

**To Add a Principal Investigator (PI) to your proposal:**

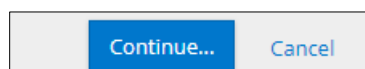
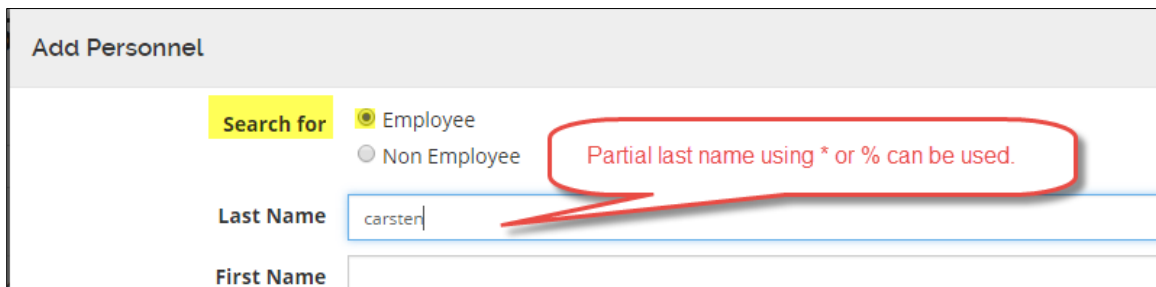
1. Click the **Key Personnel** → **Personnel** subpanel on the **Navigation** panel.

**Key Personnel** screen will open.

2. Click the **Add Personnel** button. An **Add Personnel** window will open.



3. In the **Add Personnel** window, in the **Search for** section, select the **Employee** radio button. Enter the search criteria for the PI and click the **Continue** button.





4. Select the PI from the search results by clicking the **radio button** next to the Full Name and click the **Continue** button.

Only the top 200 results were returned. If you cannot find what you are looking for, please refine the search criteria

Full Name:	User ID:	Email Address:	Unit Number:	Unit Name:	Organization:	City:
<input checked="" type="radio"/> Christine L Carsten	ccarsten@colostate.edu	Chris.Carsten@ColoState.EDUCO-2002		Sponsored Programs	Sponsored Programs	Ft. Collins

Showing 1 to 1 of 1 entries

Buttons: First, Previous, 1, Next, Last

Buttons: Continue..., Go back, Cancel

5. In the **Assign a role** window, select the radio button next to the role to assign. For example, select the **Principal Investigator** and then click the **Add Person** button.

Assign a role \*

- Principal Investigator
- Co-Investigator
- Key Person

Buttons: Add Person, Go back

NIH menu of role options

Assign a role \*

- PI/Contact
- PI/Multiple
- Co-Investigator
- Key Person

Buttons: Add Person, Go

**NOTE:** For PHS/NIH multiple PI projects, one individual must be assigned the role of **PI/Contact**; this person is the lead PI for the proposal. Other investigators can be added as **PI/Multiple** if they meet the [NIH definition of multi-PI](#).

The selected individual is added to the **Key Personnel** screen with seven tabs across the top (**Details, Organization, Extended Details, Degrees, Unit Details, Person Training Details** and **Proposal Person Certification**) that displays additional information about the individual.

Click the  next to the **Person's** name to display the **Person Details** information.

Key Personnel

Search for and add key personnel

Buttons: Add Personnel, Notify All

Christine L Carsten (Principal Investigator) (Certification Incomplete) Notify Christine L Carsten

Details Organization Extended Details Degrees Unit Details Person Training Details Proposal Person Certification

**Details**

Proposal Person Role Id: Principal Investigator

Full Name: Christine L Carsten User Name: ccarsten@colostate.edu


First Name: Christine Last Name: Carsten

Middle Name: L eRA Commons User Name:

Buttons: Back, Save, Save and Continue, Close



6. Click the **Save** button. (This keeps you on the **Key Personnel** page.)

To remove **Personnel**, click the delete icon  located in the name header of the individuals.



### Adding additional Key Personnel (co-Investigators, 'key' persons)

The **Key Personnel** section is also where co-Investigators and other 'key' persons are added. These named individuals contribute in a substantive way to the scientific development or execution of the project, *whether or not they receive compensation* from the grant supporting the project. Key personnel entered in this section will be included in the internal routing for approvals for the KR PD record.

For non-s2s (system-to-system) proposals, only CSU employees will be added to this section.

Repeat the steps to Add Personnel and search for Employee (steps 1 – 4). Use minimal criteria and wildcards for partial name searching.

**Add Personnel**

Search for  Employee  
 Non Employee

Last Name

First Name 

User Name

Email Address

Office Phone

Home Unit

Campus Code

Use minimal criteria to reduce the number of search results (do **not** enter data in all fields)  
\* and % are 'wildcard' characters for partial name searching

**Example of Key Person role:**

**Add Personnel**

**Assign a role**

Assign a role: \*

Co-Investigator

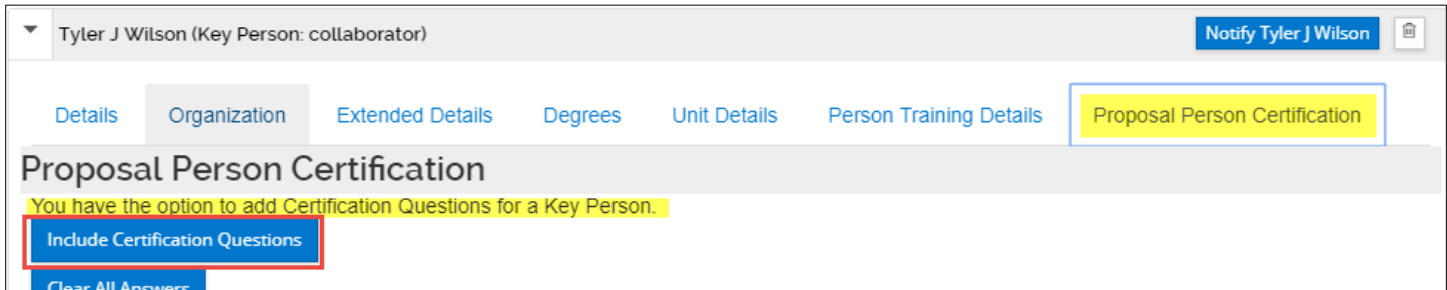
**Key Person**

**Key Person's role will be:**

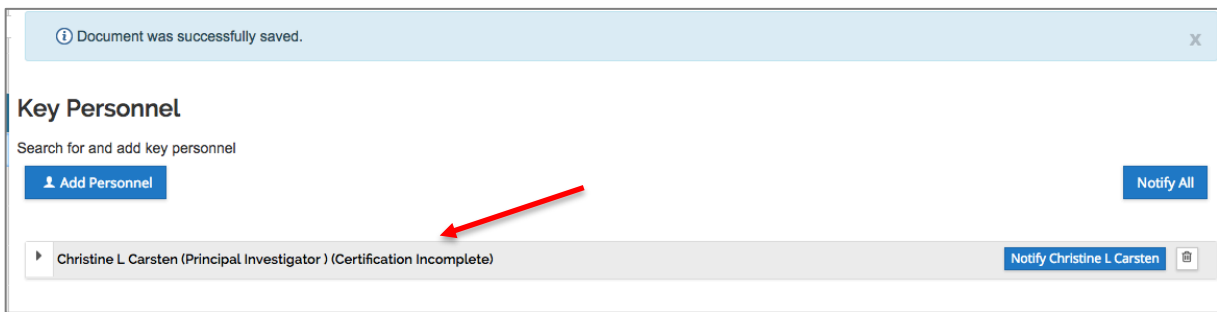
the Key Person role requires additional information



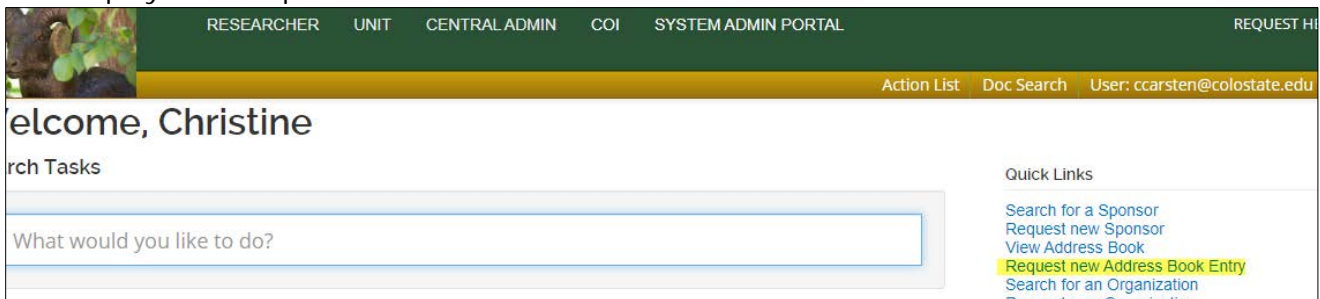
**NOTE:** CSU Key Personnel, regardless of role, are required to complete the Proposal Person Certification questions located in this section. Questions are enabled by default for PI and co-Investigator. Use the **Include Certification Questions** button for people added with a Key Person role:



The certification questions can be answered at any time after the key person has been added in this section. If not completed before the proposal starts routing, the questions must be answered before the person can complete the 'approve' action for a proposal in routing.



**NOTE:** For s2s (system-to-system) proposals, non-CSU employees have to be entered in the Key Personnel section to populate the Grants.gov Senior/Key Person form correctly. Use the **Request new Address Book Entry** link on the Kuali Research home page to create the task for OSP to add a person to the 'non-employee' lookup table:



Once the person has been added to the Address Book, to add the non-employee to the Key Personnel section, choose the **Non-Employee** radio button in Step 1 and then complete the search and add person steps.