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 not added to our internal KR PD record.

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.

   The 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.

![Add Personnel](image1)

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](image2)

**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.

![Key Personnel](image3)

Click the next to the Person’s name to display the Person Details information.
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.

- 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.

Example of Key Person role:

- the Key Person role requires additional information
NOTE: All CSU Key Personnel are required to complete the Proposal Person Certification questions located in this section.

The certification questions can be answered at any time after the 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 approval process: The Proposal Person Certification questions cannot be answered on the Summary/Submit page.
- Use the left navigation menu to go to Key Personnel > Personnel to find and answer these questions.
- Then use the left navigation menu to return to the Summary/Submit page to complete the approve action.

- End -