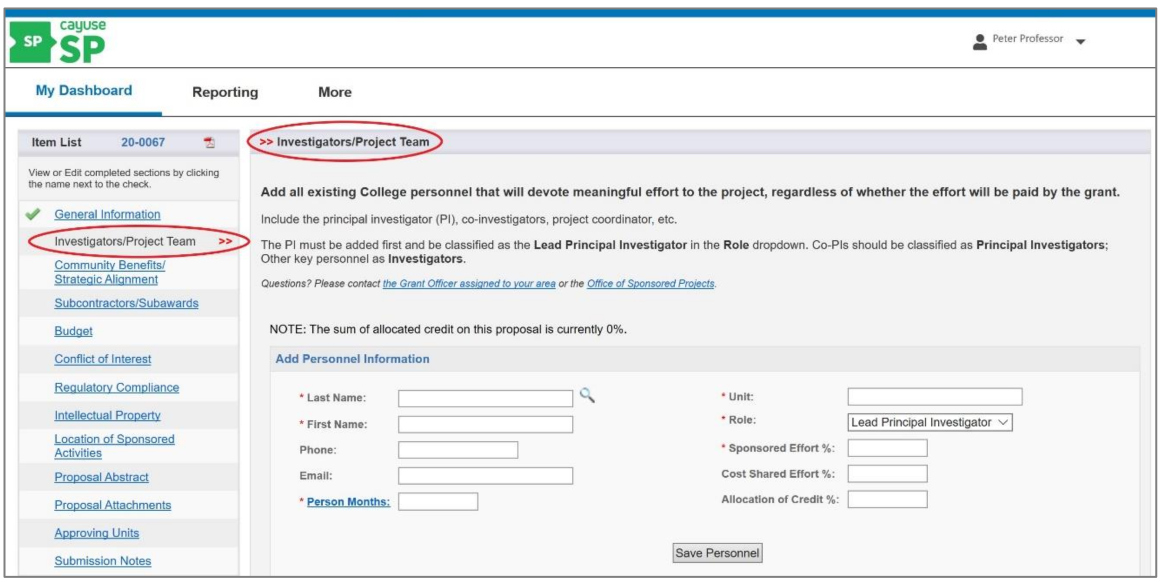
Investigators/Project Team

The next section on the **Proposal Development Menu** is **Investigator/Project Team.** This section is used to build a research team by adding the existing college personnel that will devote meaningful effort to the project, regardless of whether the effort will be paid by the grant.

The Lead-PI should discuss the project with their Grant Officer to (1) identify the personnel who will devote meaningful effort to the project, (2) identify their appropriate role, such as PI, co-PI, project manager, technical staff, student, other key staff, etc., and (3) estimate their effort on the project. Meaningful effort is considered effort that is measurable.

Click into the **Investigators/Project Team** section of your proposal from the Proposal Development Menu.

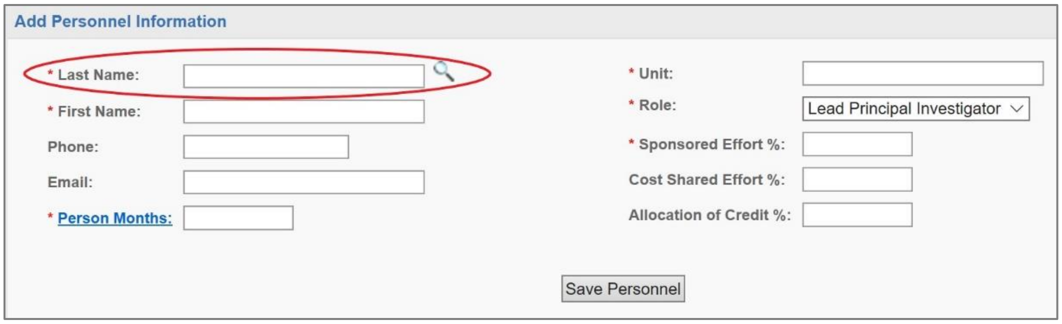


Add Personnel Information

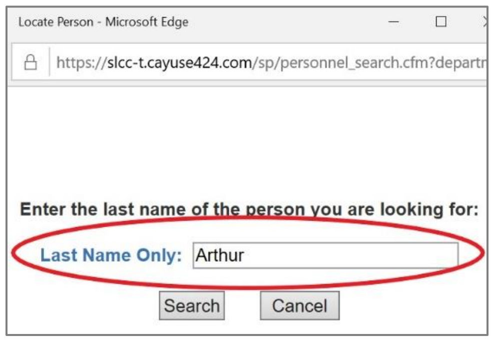
Lead Principal Investigator

The Lead-PI must be added first and be classified as the Lead Principal Investigator. The Lead PI is the individual responsible for the programmatic, technical, regulatory and financial aspects of the project. The role of Lead-PI must be completed before a proposal can be successfully routed for internal approvals.

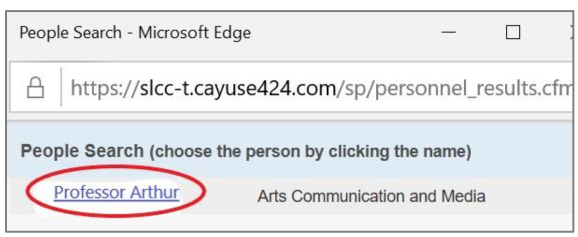
To add the Lead-PI, click into the **Last Name** field or on the magnifying glass to open the person search window.



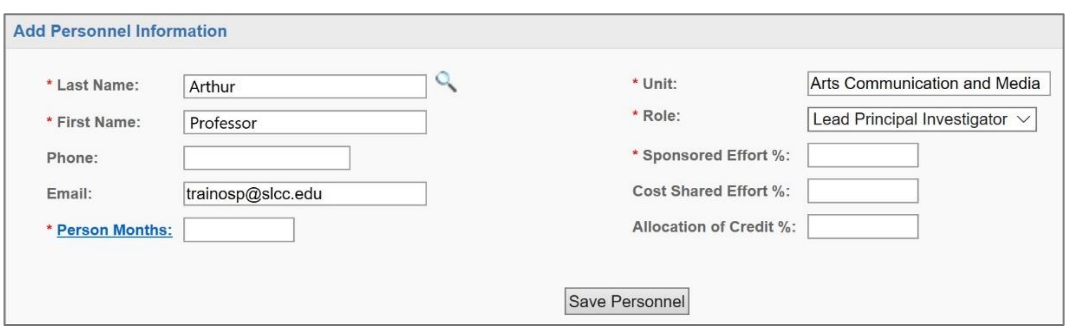
Begin typing the first few letters of the Lead-PI's last name in the Last Name Only search box then click search.



Next, select the Lead-PI from the People Search pop-up list by clicking on the name.



This will populate the **Last Name** field, **First Name** field, **Email** field and **Unit** Field. The Lead-PI will automatically be classified as the "Lead Principal Investigator" in the **Role** field.



The Lead PI's home unit will appear in the **Unit** field. If the Lead PI needs to be assigned to another unit for this work, click into the **Unit** field and select a different unit from the pop-up window.

Enter the PI's office phone number by clicking into the **Phone** field and entering the numeric phone number in the following format: (801)555-5555.

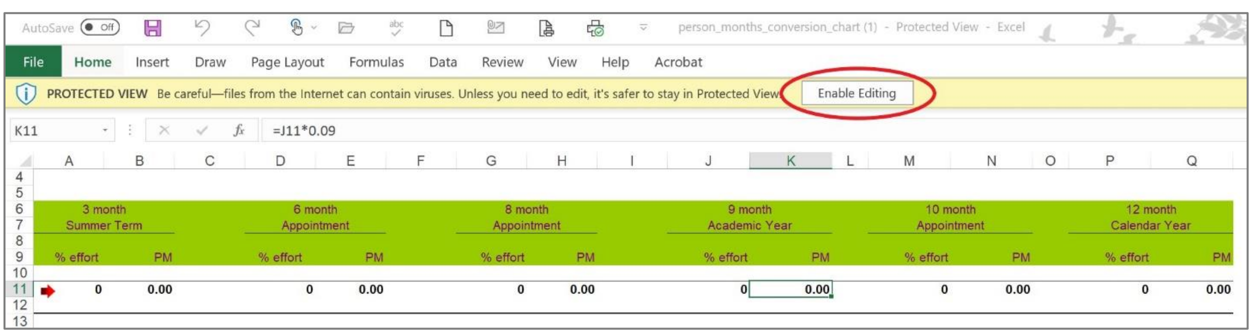
In order to complete the **Person Months** field and estimate the **Sponsored Effort %** field, you will need to complete the Person Months worksheet. These fields are related to each other. The worksheet will assist you in calculating and completing these fields.

- Sponsored Effort %: The individual's total effort in the initial or current budget period.
- Person Months: The individual's involvement in Person Months.

Click on the blue hyperlink titled, "Person Months."

This will launch a Microsoft Excel Spreadsheet. (If prompted with a pop-up asking you what you want to do with the Person Months worksheet, click Open.)

Click Enable Editing to begin using the worksheet.



This spreadsheet will assist you in calculating and completing the Person Months field and the Sponsored Effort % field.

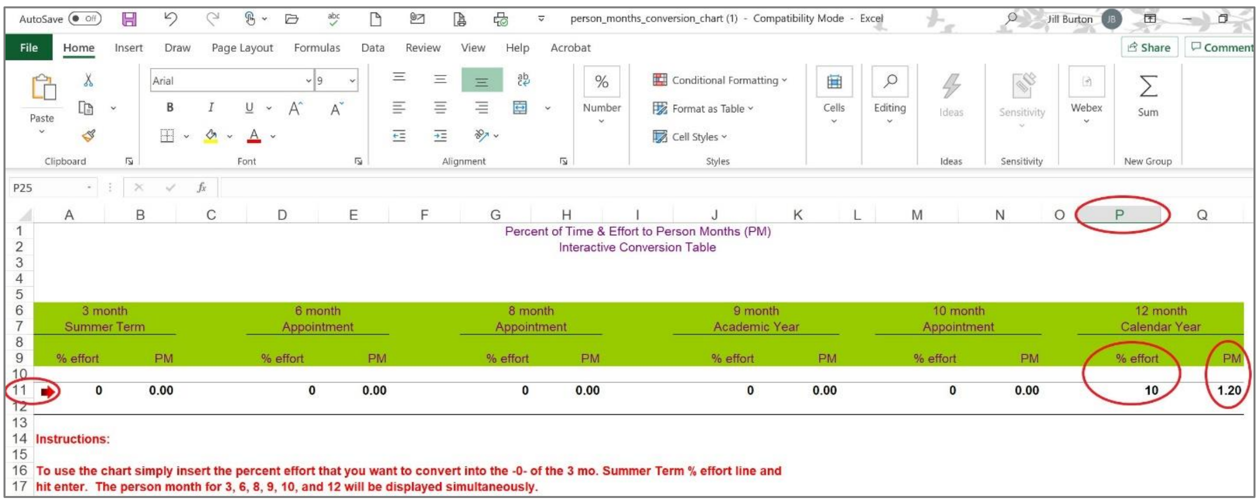
- Use the 12-month Calendar Year for staff
- Use the 9-month Academic Year for faculty
- Use the 12-month academic year for faculty with academic and summer effort

- Use the 3-month Summer Term for faculty only on summer effort

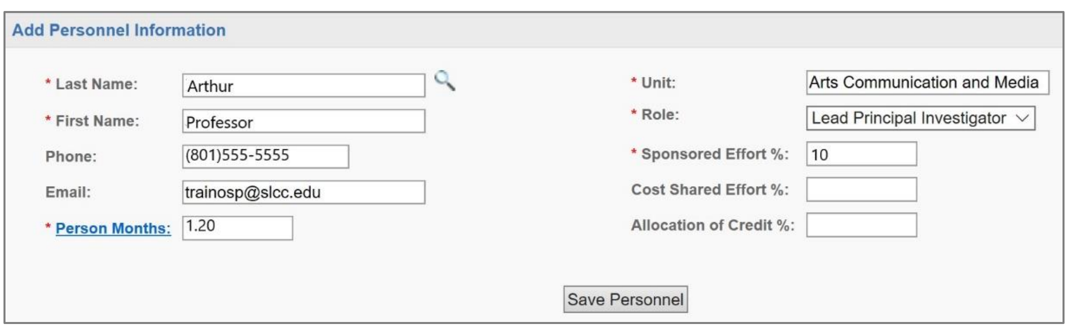
Click into Cell P-11 and type the percentage of effort the Lead PI expects to dedicate to this project.

For example, the Lead PI expects to spend approximately 4 hours per week working on the project. This is about 10% of their full-time effort that will be dedicated to this project.

- Type 10 into Cell P-11 for % effort
- The worksheet will calculate the person months (PM) in Cell Q-11
- 10% of the Lead PI's full-time 12-month effort is 1.20 person months
- This can be an estimate when initially completing this page



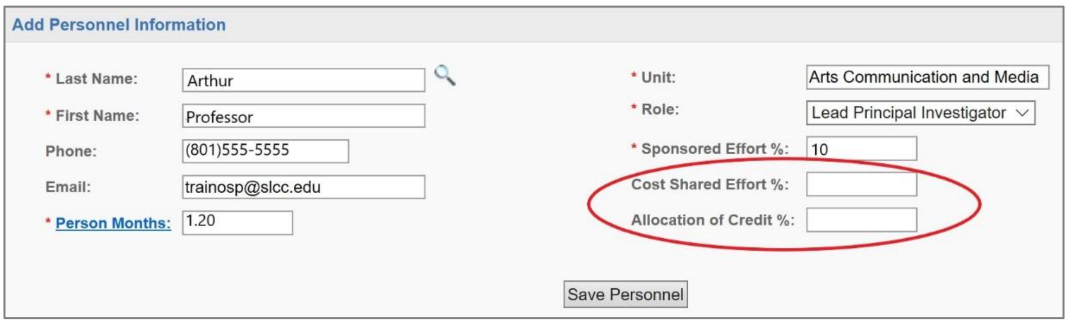
Enter these calculations into the corresponding Person Months field and the Sponsored Effort % field.



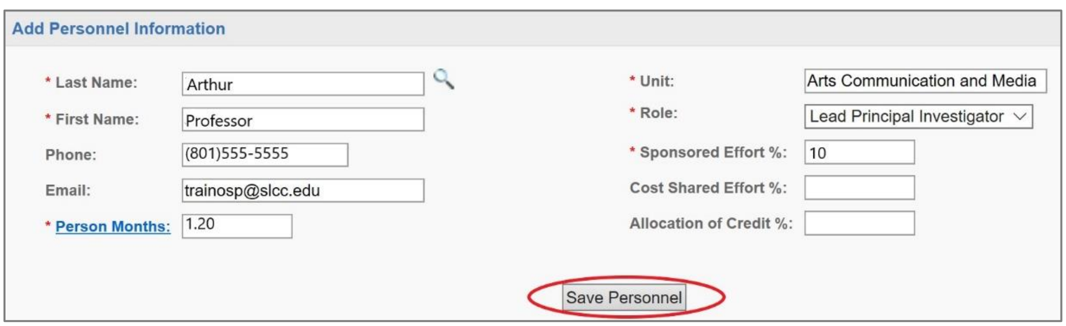
The **Cost Share Effort %** field and **Allocation of Credit %** field are optional fields. Consult with your Grant Officer when considering calculations for these fields.

Use these fields for the following purposes:

- **Cost Shared Effort %:** The portion of the individual's total effort that will be cost shared. If the proposal does not make use of cost shared effort, leave this field blank.
- **Allocation of Credit %:** The field is not often used. Work with your Grant Officer to determine if the application will require a calculation for allocating credit (example: the unit F&A return will be distributed per the allocation of credit), otherwise leave this field blank.



Complete all required fields marked with a red asterisk *. Click Save Personnel.



List of Personnel

The Lead-PI now appears in the **List of Personnel**.

List of Personnel:

Person	Unit	Role	Sponsored Effort	Cost Shared Effort	Total Effort	Allocation of Credit	Person Months		
Professor Arthur	Arts Communication and Media (SACM)	Lead Principal Investigator	10%	0%	10%	0%	1.2	Edit	Delete

Reset

This area lists all personnel as they are added to the project. This section is editable until the project is submitted for routing. As the project and budget are fully developed the percent effort will be solidified. Edit this page as necessary. Click **Edit** to make changes to an entry. Click **Delete** to remove a person from the proposal.

After the Lead-PI has been added to the project, other individuals and roles can be added to the proposal.

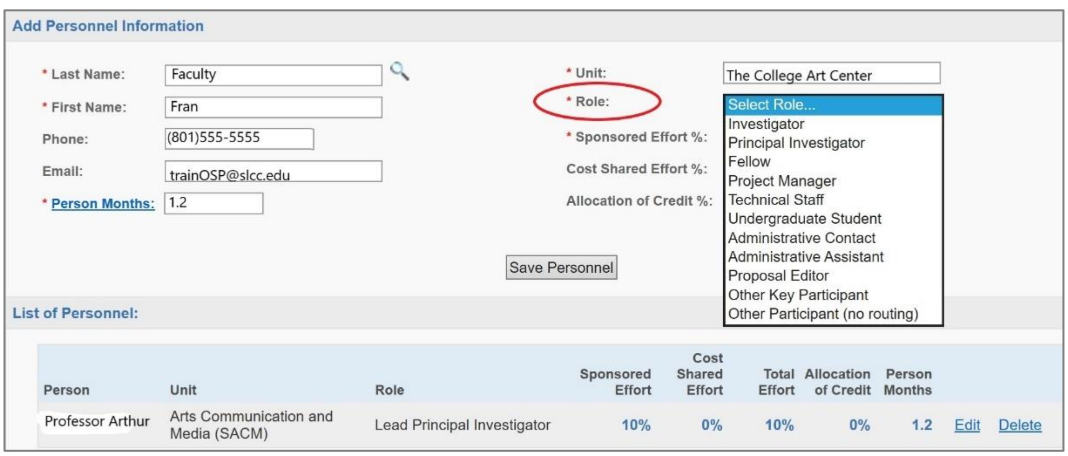
Add Personnel (other than the Lead Principal Investigator)

Add other individuals at the College who will devote meaningful effort on the project, regardless of whether their effort will be paid by the grant.

The steps for adding additional personnel to the project are the same steps as described above. However, a role must be assigned for additional personnel.

To add personnel:

1. Click into the **Last Name** field or on the magnifying glass to open the person search window. Next, select the name from the People Search pop-up list by clicking on the name to populate the Last Name field, First Name field, Email field and Unit Field. The person's home unit will appear in the **Unit** field. If the person needs to be assigned to another unit for this work, click into the **Unit** field and select a different unit from the pop-up window.
2. Enter the person's office phone number by clicking into the **Phone** field and entering the numeric phone number in the following format: (801)555-5555.
3. Assign the person's role for this project. Click on the drop-down menu to select the **Role**.



Roles to select from are:

- **Investigator**: A primary contributor to the successful conduct of a research project, or any person who is responsible for the design, conduct, or reporting of research. Classify other senior/key personnel as an "Investigator" in the Role field.

- **Principal Investigator**: Other contributors (if the sponsor allows multiple PIs). Roles that may fall under this designation include Research Scientist, Research Specialist, Research Associate, or Scholar. Classify co-investigators as a "Principal Investigator" in the Role field.
- **Fellow**: Students applying for a fellowship or support for dissertation research whose mentor is the Lead Principal Investigator on this proposal.
- **Project Manager**: A limited-basis role for program project grants.
- **Technical Staff**: Staff performing standardized or routine measurements, analyses, or procedures in support of the research project.
- **Undergraduate Student**: Undergraduates who do not meet the definition of Fellow.
- **Administrative Contact**: Contacts who have proposal edit rights, but are not named on the budget (e.g., unit contract and grant manager).
- **Administrative Assistant**: A limited-basis role used on eligible funding opportunities, such as program projects or state contracts.
- **Proposal Editor**: A role with permissions equal to the Proposal Creator in the SP and 424 records.
- **Other Key Participant**: Project participants whose role title differs from those above. After selecting Other Key Participant, a field labeled "Role Title" appears beneath the Role. Enter the participant's custom title. The participant's unit will be included in the routing list on the Approving Unit's screen.
- **Other Participant (no routing)**: Like Other Key Participants, except that the participants' units are excluded from the routing list on the Approving Units screen. Use for a person who is helping the Lead PI complete the proposal in Cayuse SP but will not be part of the research team when the project is awarded).

4. Complete the **Person Months** field and estimate the **Sponsored Effort %** field using the Person Months Excel Spreadsheet.
5. Complete all required fields marked with a red asterisk *.
6. Click Save Personnel.

The List of Personnel now includes other personnel added to the project.

List of Personnel:

Person	Unit	Role	Sponsored Effort	Cost Shared Effort	Total Effort	Allocation of Credit	Person Months		
Professor Arthur	Arts Communication and Media (SACM)	Lead Principal Investigator	10%	0%	10%	0%	1.2	Edit	Delete
Fran Faculty	College Theatre (GT)	Investigator	10%	0%	10%	0%	1.2	Edit	Delete

Reset

Internal approval will be required for all persons added to the project, except those with the Role of "Other Participant."

As a reminder, this section is editable until the project is submitted for routing. As the project and budget are fully developed the percent effort will be solidified. Edit this page as necessary. Click **Edit** to make changes to an entry. Click **Delete** to remove a person from the proposal.

Clicking Reset will remove all personnel and their information from the List of Personnel. Do not click reset unless you intend to remove the entire research team and start over.

Next Step

Navigating and completing the **Community Benefits/Strategic Alignment** section.
For more information, see Cayuse SP - User Guide: Community Benefits/Strategic Alignment.