

This section is intended for experienced users, or those who have some familiarity with PennERA. New users may also find it helpful.

Expanded and more detailed instructions are included in the PennERA Proposal Development User's Guide:

- o Step-by-step instructions with screen shots.
- o Helpful for all user levels but especially for newer users.

All actions to add Penn and SubAward personnel and to create SubAwards can be initiated from the Personnel screen.

Budget details for Personnel, Non-Personnel, and SubAwards (subcontracts) are added from the Budget section.

**Overview and Basic Data Entry Steps: Personnel Screen**

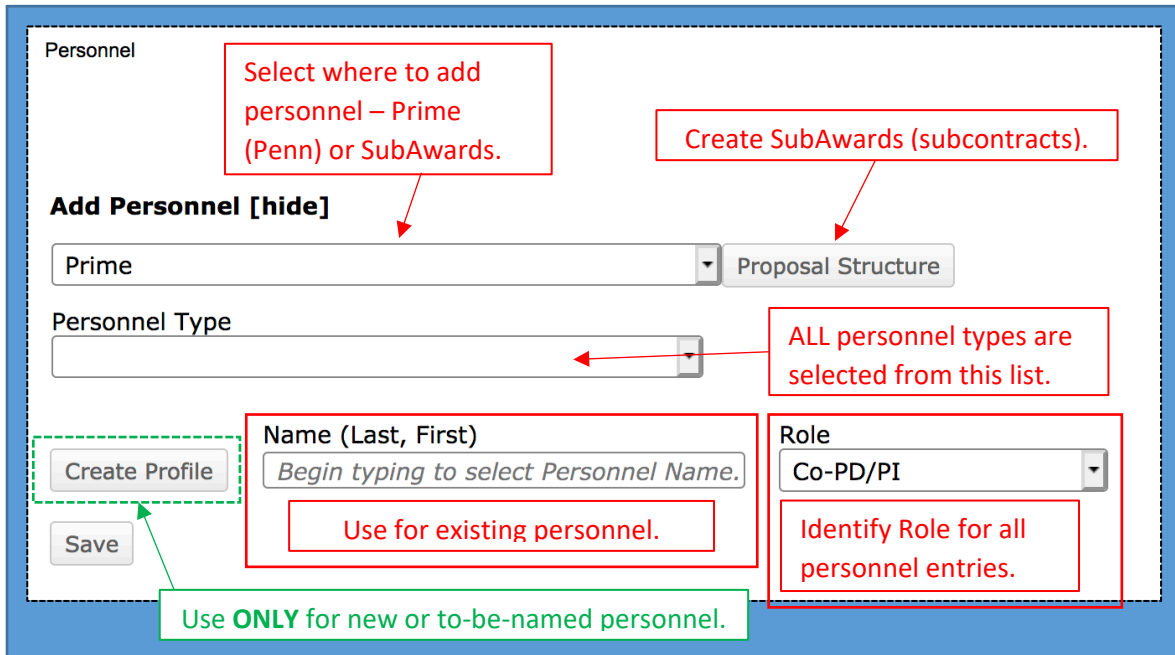
*This section provides a high-level overview of the Personnel screen and Budget section.*

All actions to add Penn and SubAward personnel and to create SubAwards can be initiated from the Personnel screen.

Budget details for Personnel, Non-Personnel, and SubAwards (subcontracts) are added from the Budget section.

**NOTE:** Penn Key and Non-Key Personnel and SubAwards may also be added in the Budget section.

**Personnel Screen Basic Data Entry**



2. Proposal Structure

- The elements of the Proposal Structure are Prime (Penn) and SubAwards.
- Use the drop-down list to select where to add personnel, either on the Prime (Penn) or SubAward budgets.

✓ Prime  
SubAward: 7017036

- Click **Proposal Structure** to add SubAwards (subcontracts) and view the elements in the proposal record.

Budget Structure		Master/Child Structure				Associated Budget/Award Increments						
Element	Institution Number	Project ID	Organization	PI	PI Department	Period	Type	Start Date	Active	Add Element	Remove	
Prime	10073627	●	University of Pennsylvania	F	E	Requested Period 1	Budget Period *	01-Oct-2020	✓	Add SubProject Add SubAward		
								01-Oct-2021	✓			
								01-Oct-2022	✓			
								01-Oct-2023	✓			
								01-Oct-2024	✓			
SubAward	7017036	●	Children's Hospital of Philadelphia			Requested Period 1	Budget Period *	01-Oct-2020	✓	Add SubAward	Remove	
								01-Oct-2021	✓			
								01-Oct-2022	✓			
								01-Oct-2023	✓			
								01-Oct-2024	✓			

- **IMPORTANT NOTE:** Always contact [PennERAhelp@lists.upenn.edu](mailto:PennERAhelp@lists.upenn.edu) if a SubAward entity is not available for selection. Do **NOT** select a “placeholder” entity.

3. Personnel Type – list of values

- Use the drop-down list to select.  
**NOTE:** Key and Non-Key Personnel may also be added from the Budget section.

Personnel Type

- Key
- Non-Key
- Other Significant Contributor
- Consultant - Key
- Consultant - Non-Key
- External Consultant - Key
- External Consultant - Non-Key
- External Consultant - Other Significant Contributor

4. Name (First, Last) – data entry field

- Use this field to enter the name of existing staff for either Penn or SubAward personnel already included in the subcontractor database.
- This is a predictive search field: Begin typing either first or last name to locate existing names.

5. Create Profile – action

- This action is used to add personnel who are not available from the list of existing people.
- **Do not use** this option to add existing Penn personnel who are not located during the locate step above.
  - Contact [PennERAhelp@lists.upenn.edu](mailto:PennERAhelp@lists.upenn.edu) if existing staff are not available for selection.

6. Role – list of values

- Use the drop-down list to select from a list of commonly used Roles.
- Use “Other (*specify*)” or “Other Professional” to provide customized user-defined descriptions.

*Personnel Screen Data Display*

Senior/Key

PI	NAME/ROLE	MAIL	ALERT	ORGANIZATION / DEPARTMENT	% EFFORT	CV/BIOSKETCH	CURRENT/PENDING SUPPORT	REMOVE
1	Evelyn J Ford PD/PI *	✉		University of Pennsylvania 8760 - Research Services	35%	📎	📎	🗑️
2	Jill Phillips Ginsberg SubAward PI	✉	⚠️	Children's Hospital of Philadelphia	0%	📎	📎	🗑️
1	Soraya Abbasi Other Significant Contributor	✉		Child Neon		📎	📎	🗑️
1	DONNA M NEY Consultant	✉		Univ 8760		📎	📎	🗑️
1	ELIZABETH D PELOSO Co-Investigator	✉		Univ 8760		📎	📎	🗑️
1	Todd S Swavely Co-PD/PI	✉		Univ 8760		📎	📎	🗑️
1	CHRISTINE SUTTO Graduate Student	✉		University of Pennsylvania 8760 - Research Services	0%	📎	📎	🗑️

Non-Key

Legend:

- 1 Prime
- 2 SubAward - 7017036 (Jill Ginsberg)

Internal Administrative Contact (this information does not go to the sponsor)

Responsible Business Administrator: Susan B. Anthony

Resp BA phone: 215-898-0000

Resp BA email: anthony@s.upenn.edu

Personnel listings are grouped by the selected Personnel Type (screen shot above shows only two Types – Senior/Key and Non-Key).

- Click on individual names to view PennERA Profile details.
  - **Always** update detail from within the PennERA Profile.
  - Click on the ✉ icon to send a message requesting the selected person to update his/her Profile.
- Upload required documents for Senior/Key Personnel in S2S applications that must provide a Senior/Key Person form.
- Individual listings may be re-ordered by clicking and holding ⋮ to enable drag-and-drop at the beginning of each entry.
- Personnel are identified by a proposal structure icon 1, either as Prime (Penn) or SubAward.
- Effort is shown as entered in the Budget section.