I. **Quick Steps: Personnel Screen and Budget Section**

This section provides recommended quick steps for basic functions in the Personnel and Budget sections.

Always contact PennERAhelp@lists.upenn.edu for these issues:
  » A sponsor or subcontractor is not available for selection.
  » An existing Penn staff name is not available for selection.
DO NOT use "placeholder" or incorrect selections or create new profiles for existing staff.

1. Add all personnel who are not part of a subcontract.
   » Use for all Penn personnel (existing and TBD), Other Significant Contributors, and External Consultants who are not associated with a specific subcontract.
   STEPS
   - Personnel screen > select Prime proposal element (Penn is the Prime).
   - Select Personnel Type.
     o Use Key and Non-Key only for personnel with measurable effort.
   - Locate existing staff by typing in Name field [*Begin typing to select Personnel Name...*] .
   OR
   - Click [Create Profile] for TBDs or names not located (never use for existing Penn personnel).
     o External Consultants also require identifying an external institution.
2. Create subcontracts.
   » Subcontracts (SubAwards) can be initiated from the Personnel screen even if Adobe forms provided by the subcontractor will be imported.
   STEPS
   - Personnel screen > click [Proposal Structure] to open the Budget Structure screen.
   - Click Add SubAward to the Prime or another first-tier SubAward element.
   - Select SubAward entity and associated PI.
3. Add all SubAward personnel if the subcontract is not being imported from Adobe forms (see below for import quick steps).
   STEPS
   - Personnel screen > select SubAward element of the Proposal Structure.
   - Locate staff previously entered in PennERA by typing in the Name field.
     [*Begin typing to select Personnel Name...*] .
   OR
   - Click [Create Profile] to add TBDs or named staff not previously entered.
4. Add Penn Personnel expense details.
   STEPS
   - Budget section > Budget screen > Personnel heading.
   - Click [Detail] for each person to add expense details – salary, benefits, effort, cost-sharing.
     NOTE: The Personnel, Non-Personnel, and SubAwards headings may be hidden or shown to reduce screen "clutter" when working in one of the other expense sections.
5. Add Penn Non-Personnel expense.
   STEPS
   - Budget section > Budget screen > Non-Personnel heading.
   - Select Budget Category > Click [Add Item] to create Detail screen to enter expense and cost-sharing.
6. Add SubAward expense details.
   STEPS
   - Budget section > Budget screen > SubAwards heading.
   - Click [Detail] to open SubAward screens
   - Click [Import/Export] to import Adobe forms.
     OR
   - Manually add and enter expense details in the same way Penn budget data is entered.