IAF Data Entry - Personnel tab

For the most up-to-date information, please visit this article in Service Now.

This tab contains information for all Penn State investigators listed as key or significant contributors on the proposal or award.

All personnel on the list must be named (no TBD’s) and will have to fill out the Investigators tab and approve the IAF prior to proposal or award submission.

If the budget has been imported from SIMSbudgets, the name, department, role, and effort will be populated. The effort from the first period is imported into the effort column(s). If the investigator’s effort varies from the first period to any additional periods, that option will be checked. To see the effort by period, go to the Budget tab and view the detailed budget.

To add an investigator, fill out their name, role, effort, and credit and click the green “+” icon to commit the entry.

To delete an investigator, click the Delete button.

% Credit is not imported from SIMSbudgets and must be entered manually. The sum of all credit must equal 100%.

1. **SIMSbudgets Budget #**: Read-only. Investigator list can be refreshed from the budget. Note that a refresh will remove any previous edit and force re-approvals. (see "Refreshing Budget")
2. **Name of the Investigator**: The Primary PI can only be changed on the Proposal Basics tab. Type the first few letters of the investigator’s name or userID to see a search list. NOTE: This must be a validated name. If the PI is not available in the search list, please click "Request Add Person" above and submit the subsequent form so they can be added. **WARNING**: Changing this value after workflow has started will clear approvals.
3. **Department**: Investigator’s home department is automatically populated from the person profile. If this is incorrect, contact SIMSAdmin@psu.edu. DH of home department will be a required approval.
4. **Role**: Investigator’s role on this proposal. Principal Investigator; Co-Investigator; Co-PI; Project Correspondent; Faculty; Post Doctoral; Post Doctoral Associate; Post Doctoral Scholar; Other Professional; Graduate Student; Undergraduate Student; Technician; Research Associate; Research Assistant; Other; unknown. Required to submit IAF.
5. **1st Period Effort**: Number of person month for Academic (0-9), Summer (0-3), or Calendar (0-12). Combined value cannot exceed 12 months. Can be 0. Required to submit IAF. Note that some legacy records entered prior to May 2016 may expect a percentage of effort instead of months.
6. **Varies**: If the investigator’s effort varies from the first period, this box should be checked.
7. **% Credit**: Credit should be allocated to all key personnel in accordance with their relative intellectual and technical contributions to the project. (Credit should not be understood as a direct reflection of budgeted amounts for each investigator.) Research Incentive Funds (RIF) are distributed to investigators’ home college in accordance with the assignment of credit, regardless of the administering unit. Percentages must total 100%. **WARNING**: Changing this value after investigator approval triggers a change rule and requires additional approvals.
8. **Are there retired faculty participating in the proposed research?**: See RAG09. Required to submit IAF.

Correcting a name on the Personnel tab

Sometimes incorrect personnel are added to an IAF or the person’s affiliation is incorrect. If an incorrect person is added, just delete the name and add the person. If the person affiliation is incorrect, you’ll need to first contact IAF support (epiaf@psu.edu) with the correct affiliation. Once the affiliation is correct, just highlight the person name and re-enter. This will re-validate the name with the correct affiliation and build the proper approval path.