

GUIDE

Identifying Key Personnel



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Key Personnel Overview

Key or Senior Personnel are individuals who contribute significant, measurable effort to the scientific development, technical direction, or execution of the project.

- Consult the current guidelines from your sponsor, such as the [NSF PAPPG](#), for the appropriate designations of Key or Senior Personnel.
- Common types of Key Personnel recognized by sponsors are Principal Investigator (PI), Program Director (PD), Co-Principal Investigator (Co-PI), Co-Investigator (Co-I), Collaborator, Consultant, Other Key Participant, Other Significant Contributor.
- Key Personnel are usually faculty or other comparable professional staff. Students, postdocs, and staff are listed in the Personnel section of the budget but are not usually defined as Key Personnel. Exceptions are some doctoral, postdoctoral, or training grants.

Streamlyne can draw Key Personnel information from an internal UNM personnel database OR from an address book of external persons updated by our users. Note that UNM HSC personnel are generally “external” persons, though some have main campus affiliations may be listed in the internal user database.

Adding Key Personnel

ADDING UNM KEY PERSONNEL

- To add a UNM main or branch campus person, make sure that **Internal User Name** is selected above the search window in the **Key Personnel** panel. You can find a UNM person using one of two methods

- If you know the UNM email address, type the full address (xxxx@unm.edu) in the search window and press **TAB**. If a record is found, their information should appear below the search bar.
- Alternatively, click the magnifying glass icon to open the **Person Lookup**. Enter the first and/or last name and click **Search**. If you are unsure of the spelling, you can use wildcard search, e.g., **Luc***, to bring up all matches. Click **return value** next to the person you wish to add.

Key Personnel 

Internal User Name
 External Address Book ID

SEE ALSO: [HOW TO PERFORM SEARCHES IN STREAMLYNE](#)

Person Lookup

Person Id:   

First Name:

Email Address:

Active: Yes No Both

Campus Code:  

Last Name:

User Name:

Office Phone:

Home Unit:  

Return Value	Person Id	Full Name	User Name	Email Address	Directory Department	Directory Title (S2S)	Office Location	Office Phone	School	Active
return value	100187	Lobo Lucy	lobolucy@unm.edu	lobolucy@unm.edu		Professor				Yes

- When the correct person has been identified, select a **Project Role** (see: [Streamlyne Project Roles](#)) from the drop-down list.
- Click the red **Add** button to finalize your selection.

Key Personnel 

Internal User Name
 External Address Book ID

* Person	Unit	* Proposal Role
Add: Lobo Lucy  lobolucy@unm.edu	Anthropology Department	PI/Contact 



- You should now see a new red pane for each added key person.

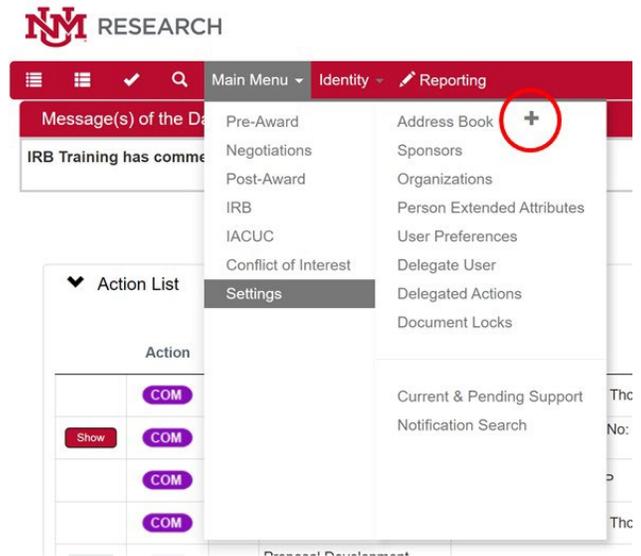
  1. Lobo Lucy Principal Investigator (Internal Person ID: 100187)

ADDING EXTERNAL PERSONNEL TO THE ADDRESS BOOK

- External users must be available in the **Address Book** before they can be added to a proposal. Once an Address Book entry has been created (by any Streamlyne user), the person will be available immediately and for any future proposals.
 - If the external person is already in the Address Book, proceed to the next section: [Adding External Personnel to the proposal](#)

- The Address Book can be modified by any Streamlyne user and is accessible by navigating to **Main Menu > Settings>Address Book**. Click the plus (+) sign to add a new entry.

Hint: We suggest opening a new browser window to work on the Address Book so that you do not lose your place in the proposal.



- The following fields should be completed to add an address book entry for a person:
 - Description:** type any note, such as “Add Person X”
 - Country Code**
 - State** (if U.S.)
 - First Name**
 - Last Name**
 - Email Address**
 - Organization: use **Link to Organization** to search for an organization in the database. If not found, free-type in the **Organization** field
 - Owned by Unit:** By default, displays 000001 (University of New Mexico). If desired, you can link your entry to a specific Unit/Department to make it easier to search for them later.
- Click **Submit** at the bottom of the page to finalize your entry.
- Return to your proposal. The newly-created address book entry will now be available to name as a Key Person.

ADDING EXTERNAL PERSONNEL TO THE PROPOSAL

- Select the radio button next to **External Address Book ID**.
- Click the magnifying glass icon to open the **Address Book Lookup**.

Key Personnel 

Internal User Name
 External Address Book ID



- Enter one or more fields, such as **Last Name**, **First Name**, or **Email Address** to search for matching Address Book Entries. If you are not sure of spelling, use * to perform a wildcard search on part of a name or email address.
- Click **return value** next to the person you wish to add.

Search form with fields: First Name, Middle Name, Owned By Unit, Postal Code, Sponsor Address Flag, Title, Last Name (Scientist*), Organization, Phone Number, Prefix, Suffix. Buttons: Search, Clear, Cancel.

Return Value	Address Book Id	Last Name	First Name	Middle Name	Title	Organization	Address Line 1	Address Line 2	Address Line 3	City	State	Country Code	Postal Code	County	Email Address	Phone Number	Fax Number	Sponsor Address Flag	Sponsor	Owned By Unit	Prefix	Suffix
return value	03980	Scientist	Brillian	T		University of NotUNM						USA			BrillianTScientist@notunm.edu			No		University of New Mexico		

- Confirm that the correct person is identified and select a **Proposal Role** (see: [Streamlyne Project Roles](#)) from the drop-down list.
- Click “Add” to finalize your selection.

* Person	Unit	* Proposal Role	* Key Person Role	
Add: Brillian T Scientist BrillianTScientist@notunm.edu	University of New Mexico	Key Person	Consultant	Add Clear

6. You should now see a new red pane for each added key person.

▶
4. Brillian T Scientist
Key Person (External Address Book ID: 103980)

Streamlyne Project Roles

Each Key Person must be identified with one of the **Project Roles**.

- PI/Contact:** Lead or Contact Principal Investigator (PI). PI/Contact is a required Proposal Role prior to submission. Only one PI/Contact is allowed.
- Co-investigator:** Use for NSF Co-PI role, NIH Co-investigator role, and similar. For MultiPI proposals, select Co-investigator and tick the box labeled **Multiple PI**.

* Proposal Role	Multiple PI
Co-Investigator ▾	<input checked="" type="checkbox"/>

- **Key Person:** Use for other types of key persons, as needed, e.g., senior collaborators, consultants, and other significant contributors. When Key Person is selected, you must also enter a **Key Person Role**. Refer to sponsor guidelines for applicable roles.

After a person has been added, their role may be edited in the **Person Details** fields under their name.

Editing Key Personnel Details

After a key person has been added, click the arrow next to their name to view editable details. This section of the guide describes the information which you should provide/verify. Most fields found here are optional. Click **Show** to access each section.



1. Lobo Lucy Principal Investigator (Internal Person ID: 100187)

Lobo Lucy

- Show Person Details
- Show Person Effort
- Show Extended Details
- Show Degrees
- Show Unit/Department Details
- Show * Proposal Person Certification (Incomplete)

PERSON DETAILS

- Where available, person details are imported from the UNM Banner database. Details may be added or edited, but this will affect only the current proposal.
- Please verify or provide a good contact phone number (**Office Phone** or **Mobile**) for the PI.
- You may also change the assigned **Proposal Person Role** here.

UNIT/DEPARTMENT DETAILS

All Key Personnel must be assigned to one or more Unit(s)/Department(s) at UNM

- UNM personnel will automatically be assigned to the Unit associated with them in Banner. Unit(s) may be added or deleted as appropriate to the current proposal

	Unit/Department Name	* Unit/Department Number	Actions
Add:	(select) 🔍	<input type="text"/>	<input type="button" value="Add"/>
1	Anthropology Department	045A	<input type="button" value="Delete"/>
2	A & S Interdisciplinary Programs	286A	

- To add an additional unit, enter the **Unit/Department Number** (UNM organization code), or click the magnifying glass to perform a search by **Unit/Department Name**. Be sure to click the **Add** to button to confirm your entry.
Note: Unit assignments will determine the administrative approvals required for routing.
- To remove a unit affiliation that is not applicable to the proposal, click the **Delete** button.
*Note: The PI/Contact must be associated with the Lead Unit identified in the **Proposal** section.*

- To avoid a proposal validation error, External Personnel must also have an assigned unit. Please type **EXT** (EXTERNAL) or search for the Unit/Department of the Lead PI.

PROPOSAL PERSON CERTIFICATION

All UNM PIs and Co-Investigators must certify their compliance with ethical and policy/legal requirements before the proposal is submitted. Please read the short series of questions carefully and answer truthfully.

- The lead PI may certify the proposal on behalf of other investigators. Alternatively, other investigators may be given Permissions to certify the proposal themselves.
- Note that completing the Proposal Person Certification is not the same as approving the proposal submission. After a complete proposal has been submitted for routing, UNM PIs and Co-Is will be required to approve the final proposal submission.
- Proposal certification questions should not be completed by non-investigators (e.g., administrative staff) without verifying each response with the investigators.
- External personnel and those with the “Key Person” role are not required to complete the certification.
- Click the red **Save** button after completing each Proposal Person Certification.

SEE ALSO: [HOW TO EDIT PROPOSAL PERMISSIONS](#)

Hide
* Proposal Person Certification (Incomplete)

Questions
Print

The information submitted within this application is true, complete and accurate to the best of my knowledge. Any false, fictitious, or fraudulent statements or claims may subject the Organization, and the investigators to criminal, civil or administrative penalties. More Information...

Yes No

I have the responsibility for the scientific, fiscal and ethical conduct of the project and to provide the required progress reports if an award is made. More Information...

Yes No

Common Errors/Warnings

When saving the Key Personnel section, the most common issues are:

ERRORS

- A PI/Contact role has not been assigned. Add the Contact PI or change the **Proposal Person Role** under the [Person Details](#) for that person
- One or more key persons do not have a **Unit/Department** assigned. Open the [Unit/Department Details](#) for each person and add a Unit/Department where needed.

WARNINGS

- If a PI or Co-investigator role has been assigned to a person who by UNM policy is not automatically eligible to serve as a PI, you will see a warning next to their name to remind you that a PI exception must be obtained for proposal submission: <https://osp.unm.edu/pi-resources/pi-eligibility.html>.



1

Principal Investigator (Internal Person ID: 66329) Exception Required