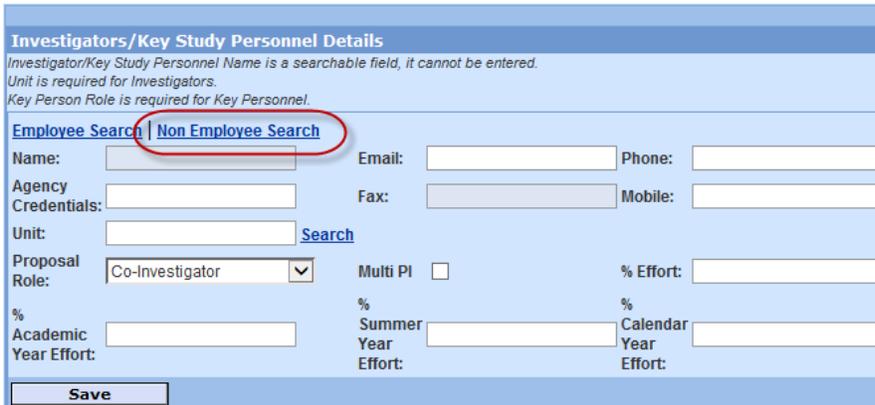


Selecting Appropriate Roles for Non-Northeastern University Investigators

Getting Started

Use the following guidelines to assist with selecting the appropriate role in ePAWS for non-NU investigators:

1. **Non-NU investigator will need access to work on the proposal in ePAWS:** The lead unit college must provide the investigator with a [sponsored account](#). Sponsored accounts are fed from HR into the system “employee” database, and only those in the employee database can have roles assigned to them in ePAWS.
2. **Non-NU investigator is from a Sub-Contract on the proposal**
 - a. Individual can be either a Multi-PI, Co-Investigator, or Key Study Person
 - b. Individual must be setup within the Rolodex
 - Add the person from the “Non-Employee Search” button

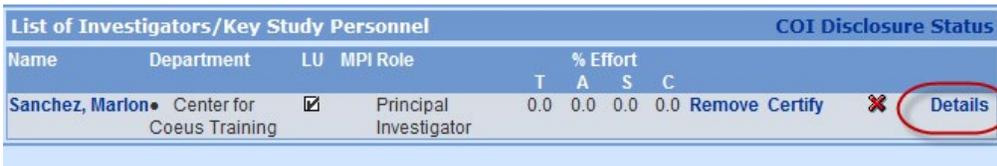


Investigators/Key Study Personnel Details
*Investigator/Key Study Personnel Name is a searchable field, it cannot be entered.
 Unit is required for Investigators.
 Key Person Role is required for Key Personnel.*

Employee Search | **Non Employee Search**

Name: Email: Phone:
 Agency Credentials: Fax: Mobile:
 Unit: [Search](#)
 Proposal Role: Multi PI % Effort:
 % Academic Year Effort: % Summer Year Effort: % Calendar Year Effort:

- After adding the investigator, select “Details” on the investigator line



List of Investigators/Key Study Personnel					COI Disclosure Status						
Name	Department	LU	MPI Role	% Effort				Remove	Certify	✖	Details
				T	A	S	C				
Sanchez, Marion	Center for Coeus Training	<input checked="" type="checkbox"/>	Principal Investigator	0.0	0.0	0.0	0.0				

- Insert the Lead Unit NUMBER from the proposal (e.g.150001) to the “Home Unit” field
- Insert the Lead Unit NAME (e.g. Center for Coeus Training) to the “Division” field

Coeus Home	My Negotiations	My Proposals	My Awards	My COI	My IRB Protocols	My IRB
----------------------------	---------------------------------	-------------------------------------	---------------------------	------------------------	----------------------------------	------------------------

[All Proposals](#) | [Proposals](#)

Proposal Summary	Investigator: Sanchez, Marlon
✓ General Info >>	Agency/Sponsor: 000340 : National Institutes of Health
✓ Organization	Title: Test routing
	Lead Unit: 150001 : Center for Coeus Training
	Last updated: 2014-02-06 16:47:12.0 by Sanchez, Marlon

Person Details for Sanchez, Marlon [Return to Investigator](#)

Unit Details				
Lead	Unit Number	Unit Name	Search	Remove
<input checked="" type="checkbox"/>	150001	Center for Coeus Training		

[Add Unit](#)

Person Details			
Full Name:	Sanchez, Marlon	User Name:	01138309
Email Address:	m.sanchez@neu.edu	Office Phone:	617-373-5036
Primary Title:	COEUS-App Support Specialist	Directory Title:	COEUS-App Support Specialist
Home Unit:	150001	School:	
Agency Credentials:		Fax:	
Pager:		Mobile:	
Office Location:	960 RP	Sec. Office Location:	
Address Line 1:	360 Huntington Ave	Address Line 2:	
Address Line 3:		City:	Boston
County:	Suffolk	State/Province:	Massachusetts
Postal Code:	02115	Country:	United States
Division:	Center for Coeus Training		

- Fill in any missing information required by the solicitation and SAVE

Note: If Investigator role is Multi-PI or Co-Investigator, Credit Split will be ZERO for the Non-NU individual, 100% to the unit

3. Non-NU investigator is a Student (e.g Graduate or Undergrad), where the solicitation requires the student be a named Principal Investigator on the proposal:

- The lead unit college must provide the investigator with a [sponsored account](#). The college may limit Sponsored Account duration to expire at the end of the proposal’s review period. The student must complete NU’s certification, and as such, will need access to the ePAWs proposal.

4. Non-NU investigator is an incoming PI or Co-PI, or a visiting professor:

- The lead unit college must provide the investigator with a [sponsored account](#). The PI or Co-PI must complete NU’s certification, and as such, will need access to the ePaws proposal.

5. Non-NU investigator is an incoming Key Study Person:

- Individual must be set up within the Rolodex
- Add the person from the “Non-Employee” search, choose the Proposal Role “Key Study Person” from the dropdown, and in the “Key Person Role” field that appears, list the appropriate role title. By assigning the “Key Study Person” role, investigator certification is currently not required (**Key Persons will need a sponsored account when “self-certify” functionality is implemented, as required by Federal Regulations**)

Investigators/Key Study Personnel Details
Investigator/Key Study Personnel Name is a searchable field, it cannot be entered.
Unit is required for Investigators.
Key Person Role is required for Key Personnel.

[Employee Search](#) | [Non Employee Search](#)

Name: Jones, W. Email: Phone: (202) 358-1514
 Agency: Fax: Mobile: Credentials: Unit: Search

Proposal Role: Key Study Person Key Person Role: Technical Officer % Effort: 0.0

% Academic Year Effort: 0.0 % Summer Year Effort: 0.0 % Calendar Year Effort: 0.0

Save

List of Investigators/Key Study Personnel							COI Disclosure Status			
Name	Department	LU	MPI Role	% Effort				Remove	Certify	Details
				T	A	S	C			
Sanchez, Marlon	Center for Coeus Training	<input checked="" type="checkbox"/>	Principal Investigator	0.0	0.0	0.0	0.0	Remove	Certify	<input checked="" type="checkbox"/> Details
Jones, W.			Technical Officer	0.0				Remove		Details

- c. After adding the investigator, select “Details” on the investigator line, and fill in any missing information required by the solicitation in the Person Details record.

NOTE: Northeastern University, through submission of the proposal, is certifying on behalf of the Investigators; as such, all Investigators must certify on their own behalf that he/she will adhere to NU policies. For non-NU Investigators, your [Grant Officer](#) can assist with providing a non-NU certification.

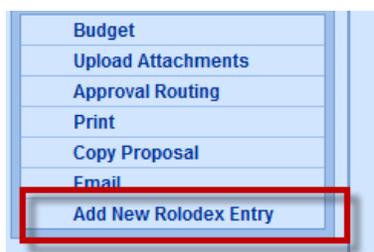
6. Adding a Name to the Rolodex

The **Rolodex**, as its name implies, is an address book of non-Northeastern Investigators (with relevant contact information) that ePAWS uses to populate investigator information in a proposal. In order to add individuals to the Rolodex, a user must have the **Rolodex Maintainer** role.

Non-Northeastern employees with a sponsored account are included in the Person Directory ("Employee Search") in the system application and need not be added to the Rolodex.

To add a non-NU Investigator to the Rolodex:

- a. Open the proposal and select **Add New Rolodex Entry**



b. From the **Add New Rolodex Person** screen select the **Search** link to find the Sponsor:

The screenshot shows the 'Add New Rolodex Person' form. It includes fields for First Name, Last Name, Middle Name, Suffix, Prefix, Title, Sponsor, Organization, Address, Country, State, Postal Code, City, County, Email, Phone, and Fax. A 'Search' button is located next to the 'Sponsor' field, which is highlighted with a red box. There are also 'Active' and 'Inactive' radio buttons and a 'Save' button at the bottom.

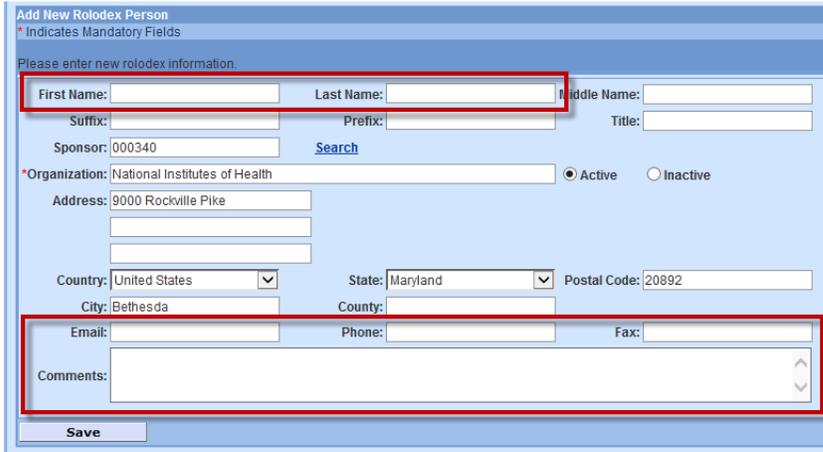
c. Enter information in the **Search** dialog window and select the corresponding Sponsor

The screenshot shows the 'SponsorSearch' dialog window. It contains fields for Sponsor Code, Acronym, Sponsor Name, Postal Code, Dun Bradstreet Number, Duns Plus Four Number, Dodac Number, Cage Number, Audit Report, Owned by Unit, Sponsor Type, State/Province Name, and Country. The 'Acronym' field contains the text 'nih' and is highlighted with a red box. There are 'Search' and 'Cancel' buttons at the bottom.

The screenshot shows the 'Sponsor Search Result' table. The first row is highlighted with a red box. The table has columns for Sponsor Code, Sponsor Name, Acronym, Sponsor Type, Description, Postal Code, State, State Description, and Country.

SPONSOR_CODE	SPONSOR_NAME	ACRONYM	SPONSOR_TYPE	DESCRIPTION	POSTAL_CODE	STATE	STATE_DESCRIPTION	COUNTRY
000340	National Institutes of Health	NIH	Federal Government		20892	MD	Maryland	United States
006898	Foundation for the National Institute of Health, Inc.	FNIH	Foundation / Non-Profit		20814	MD	Maryland	United States

- Enter the remaining information for the new Rolodex Entry



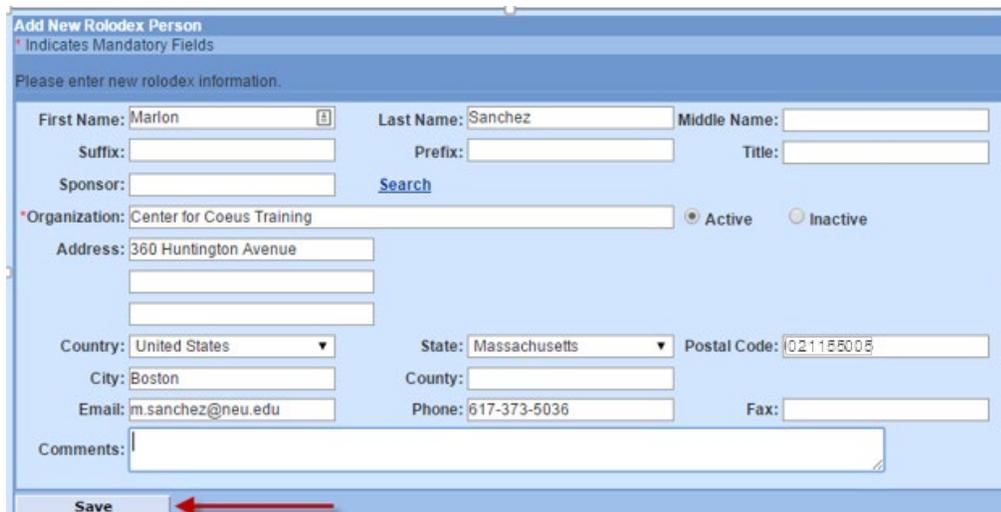
The screenshot shows the 'Add New Rolodex Person' form. Red boxes highlight the 'First Name', 'Last Name', 'Middle Name', 'Email', 'Phone', and 'Fax' fields. The form includes fields for Suffix, Prefix, Title, Sponsor (000340), Organization (National Institutes of Health), Address (9000 Rockville Pike), Country (United States), State (Maryland), Postal Code (20892), and City (Bethesda). There are also radio buttons for 'Active' and 'Inactive' status, and a 'Comments' text area. A 'Save' button is at the bottom.

- d. Click the **Save** button

If the Sponsor is not found upon searching, do one of the following:

- e. Submit a request to have the [new Sponsor](#) added to the Sponsor Table (RECOMMENDED - Saves entry steps, helps reduces errors, and helps in searching)

Complete Rolodex entry without linking to Sponsor (alternate)



The screenshot shows the 'Add New Rolodex Person' form with the following data entered: First Name: Marlon, Last Name: Sanchez, Middle Name: (empty), Suffix: (empty), Prefix: (empty), Title: (empty), Sponsor: (empty), Organization: Center for Coeus Training, Address: 360 Huntington Avenue, Country: United States, State: Massachusetts, Postal Code: 021155005, City: Boston, County: (empty), Email: m.sanchez@neu.edu, Phone: 617-373-5036, Fax: (empty). A red arrow points to the 'Save' button at the bottom left.

- f. All Rolodex entries are available to ALL users – so even if your submission is NOT Grants.gov, the following fields must be present to avoid errors in future Grants.gov submissions:

- Name (First and Last)
- Organization – Do not use any Special Characters (see Grants.gov [FAQ's](#) for more info on avoiding use of Special Characters). Special characters like an apostrophe (') will cause a transmission error in Grants.gov submissions – DO NOT INCLUDE special characters even if the company name includes it
 - For example - Brigham and Women's Hospital should be input as Brigham and Womens Hospital (no apostrophe)
- Address (street address on the first line; other lines are optional)
- City
- State
- Postal Code+4 (9 digits for US Domestic Addresses, NO HYPHEN...E.G. 021155005)
- Country
- Phone
- Email

Getting Help

NU-RES Help Center

NU-RESHC@northeastern.edu

Northeastern University Research Enterprise Services

[Grant Officer](#)