

### Personnel Effort in UVMClick Awards

- Personnel Effort data is entered by the SPA Administrator assigned for award acceptance as a part of the “Create Award” process.
- Converted Records do not have any Personnel Effort information populated from conversion. When amending or modifying a converted record, SPA Administrator must add “Personnel Effort” to their Mod type selection and complete the page.

#### Enter Personnel

1. For Proposals submitted in UVMClick, the Personnel from the proposal will flow over to the Award
2. For Proposals submitted in InfoEd, the SPA Administrator will enter PI, all Key Personnel, and Faculty.
3. Role types for each Person will be selected in accordance with the following chart:

Project Role from UVMClick (Huron)	ERS (Maximus) Role	Prior Approval (track for 25% or greater Reduction of Effort)
PD/PI (this includes MPI)	PI	yes
Co-PD/PI	CP	yes
Co-I*	OKP	yes
Faculty	OT	no
Other Professional	OT	No

\*For any identified Co-I role;

- pulled in from the FP record
- identified in a converted award
- identified in the InfoEd proposal selected for funding using the budget worksheet

The award team would CHANGE the role to “Faculty” if the Co-I was not “Named on the NOA” and therefore we do not need to track 25% reduction prior approval action.

## How to enter Personnel Effort in UVMClick Award

Last updated April 17, 2020

- Role Other must be populated with the academic appointment type by entering **C** (Calendar), **A** (Academic), or **S** (Summer). If this column is not populated or is not populated with the proper designation, the record will not move into the ERS report sent to cost accounting. It's critical that the SPA Administrator enters the appointment type as C, A, or S.

**Personnel Effort** ?

1. Name: 37029 PI:  
 - Financial Account: 37029 Period: 1  
 Start Date: 10/1/2019 End Date: 3/31/2022

SPA Administrator enters C, A, or S to designate appointment type

C = Calendar  
 A = Academic  
 S = Summer

Person	TBD	Role ?	Role Other	Start Date	End Date	Effort %	Salary Req %	Cost Share %
Jennifer Pontius		PD/PI	A	1/21/2020	3/31/2022	8		8
James Duncan IV		Co-Investigator	C	1/21/2020	3/31/2022	80	80	
Nancy Mathews		Co-Investigator	C	1/21/2020	3/31/2022	3		3
Shelly Rayback		Co-Investigator	A	1/21/2020	3/31/2022	5		
Beverley Coghill-Wemple		Co-Investigator	A	1/21/2020	3/31/2022	5		
William Keeton		Co-Investigator	A	1/21/2020	3/31/2022	1		

- If a Person has Academic and Summer effort, SPA Administrator needs to enter two lines for the individual with a Role Other designating the appointment types as "A" and "C".
- The Start and End Dates for the all effort lines should match the award start and end dates. This means if someone has and Academic and Summer appointment, they have two lines, with the same dates on each line.

**Personnel Effort** ?

1. Name: 201603605-03 PI:  
 - Financial Account: 201603605-03 Period: 1  
 Start Date: 12/1/2016 End Date: 9/30/2022

Person	TBD	Role ?	Role Other	Start Date	End Date	Effort %	Salary Req %	Cost Share %
Lisa Aultman-Hall		PD/PI	A	12/1/2016	9/30/2022	30.08	12	18.08
Britt Holmen		Co-PD/PI	A	12/1/2016	9/30/2022	100	100	
Britt Holmen		Co-PD/PI	S	12/1/2016	9/30/2022	8.33	8.33	

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7. SPA Administrator enters the total effort commitment (from the award or proposal if award does not specify) into the Effort % column for each person on the award, followed by the Salary Req % column with the percent of sponsored effort on the award. The Cost Share % column is populated automatically after Effort % and Salary Req % are entered.
8. If the awarded period of performance is less than the proposed period of performance, SPA Administrator will review how the effort was proposed and make a determination whether the effort percentage needs to be updated. If a federal award was proposed for 12 months, but is issued for 9 months, a PI may choose to utilize 90 days of pre-award spending, in this case, do not make any adjustments to the proposed effort.
9. For federal awards with greater than 18 month periods of performance, SPA Administrator creates multiple lines, breaking the periods of performance out by year. This is particularly important for federal awards, less important for a private award that does not require effort tracking.

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