Developing Your Proposal

Module 5

USC University of Southern California

Objectives

In this module you will learn how to:

- Autofill data into the proposal
- Add Performance Sites
- Add and sort Key Persons
- Attach biosketches

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Autofill

- Use the autofill pencil icon ✏ to autofill fields.
- Autofilled information comes from professional or institutional profiles.
- If profile information changes during the proposal preparation process, you can re-autofill to import the most recent information using the green refresh arrows.
- When you add a person or institution using autofill, KC S2S also autofills other logically connected fields.
  - Applicant Organization and Principal Investigator data are usually autofilled during proposal creation.

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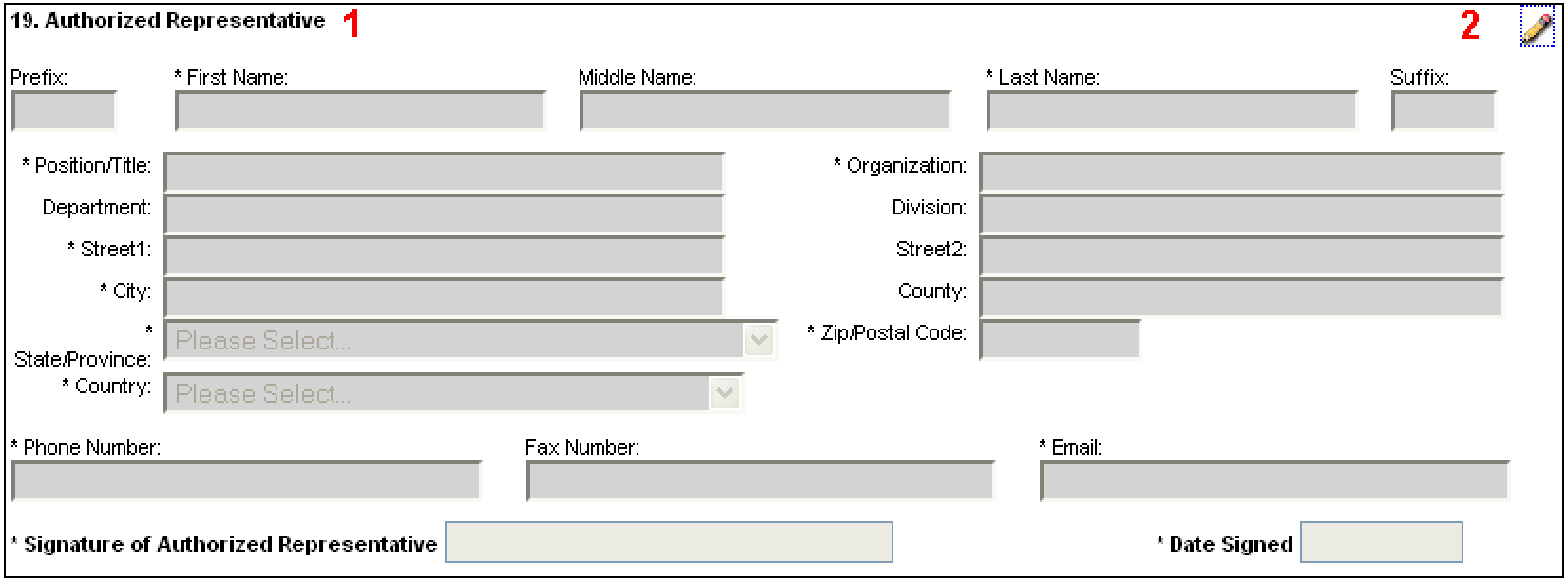
Using Autofill

1. Locate the section of the proposal you would like to autofill (e.g. Authorized Representative – Box 19 on the SF 424 Face Page).

2. Click the autofill pencil: 



19. Authorized Representative 1

2

Prefix: | * First Name: | Middle Name: | * Last Name: | Suffix:

* Position/Title:
* Organization:
Department:
Division:
* Street1:
Street2:
* City:
County:
* State/Province: Please Select...
* Zip/Postal Code:
* Country: Please Select...

* Phone Number: | Fax Number: | * Email:

* Signature of Authorized Representative
* Date Signed

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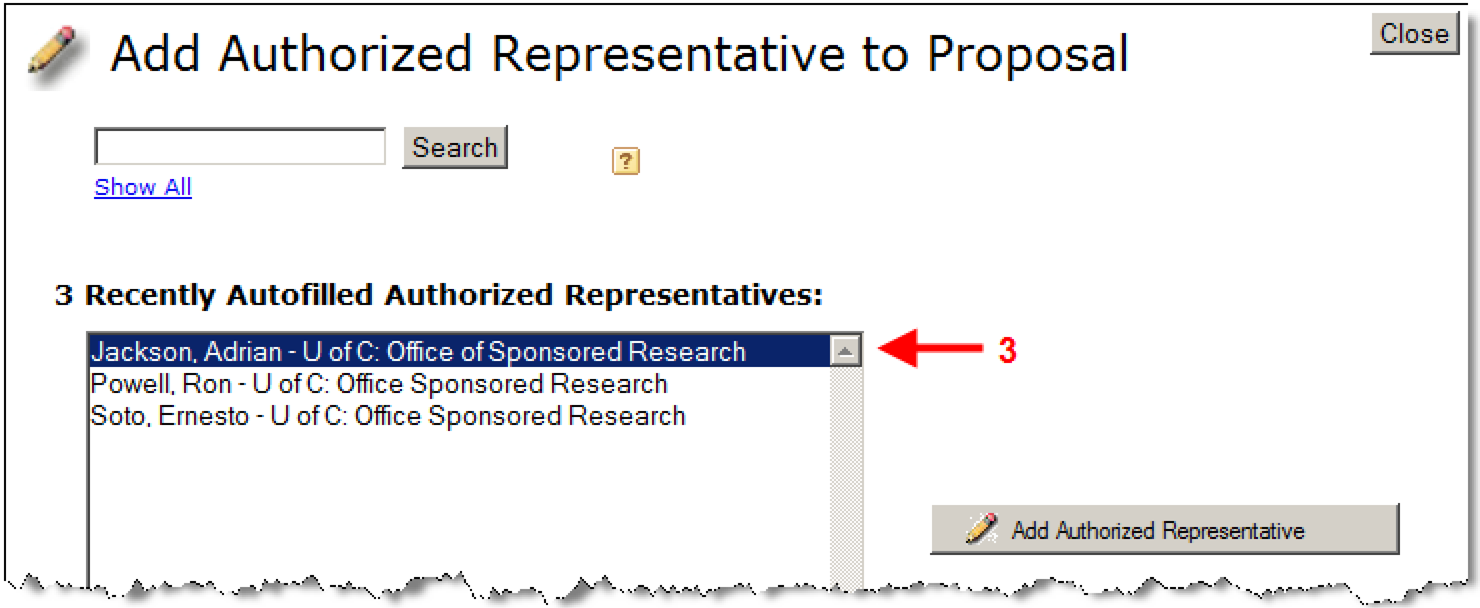
Using Autofill

3. Select the person you want to autofill.
   – Use Show All or search if you don't see their name.
4. Click **Add Authorized Representative**.



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Using Autofill

5. The person's data is autofilled into Box 19:

19. Authorized Representative

5

Prefix:	* First Name:	Middle Name:	* Last Name:	Suffix:
Mr.	Andrew		Hoff	

* Position/Title:	Director	* Organization:	University of Cayuse
Department:	Office of Sponsored Research	Division:	Office of Research
* Street1:	10700 SW Beaverton-Hillsdale Hwy.	Street2:	Bldg. II, Ste. 4
* City:	Beaverton	County:	Washington
* State/Province:	Oregon	* Zip/Postal Code:	97005
* Country:	United States of America		

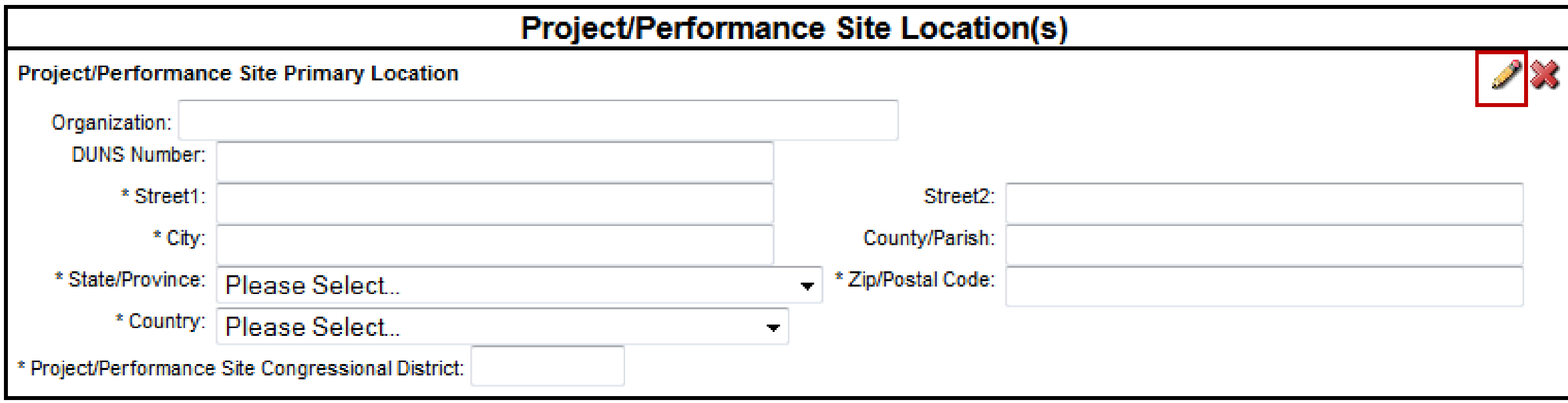
* Phone Number:	Fax Number:	* Email:
503-123-4567	503-765-4321	jcolley@cayuse.com

*** Signature of Authorized Representative**

*** Date Signed**

Autofill: Performance Sites

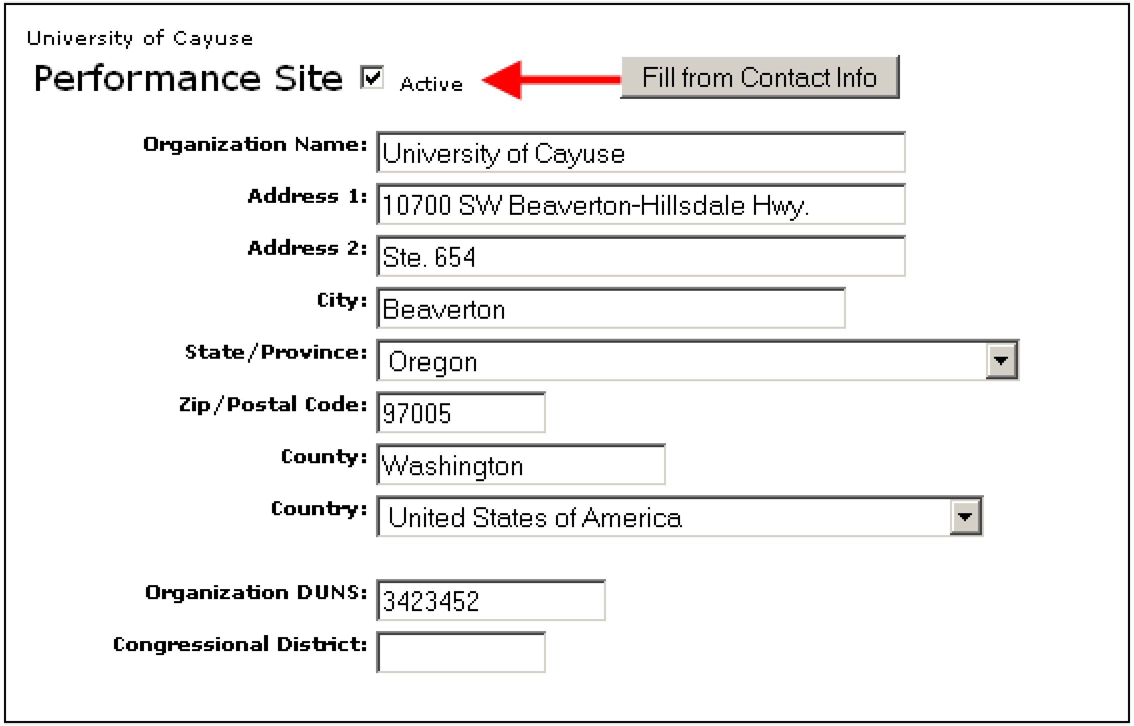
1. Add an existing performance site by selecting the autofill pencil.



2. Select a site from a professional profile:

Autofill: Performance Sites

- If you don't see a performance site for a key person, make sure their professional profile has performance site information and the site is marked as active:



Senior/Key Persons Form

- Add, edit, or autofill Senior/Key Persons
  – Adds Key Personnel on the budget form when they are autofilled into the Key Persons form
- You can add as many Senior/Key Persons as are allowed
  – KC S2S auto-generates an overflow PDF for any key persons beyond the number of slots on the form and attaches it to the proposal
- Sort button automatically orders the Key Persons list by role and name on the Key Persons form.

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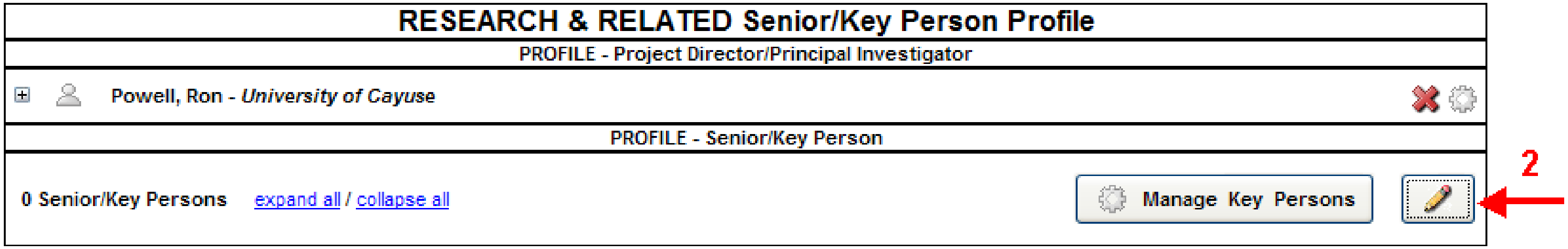
Autofill: Senior/Key Persons

1. Navigate to the **Key Persons** form.

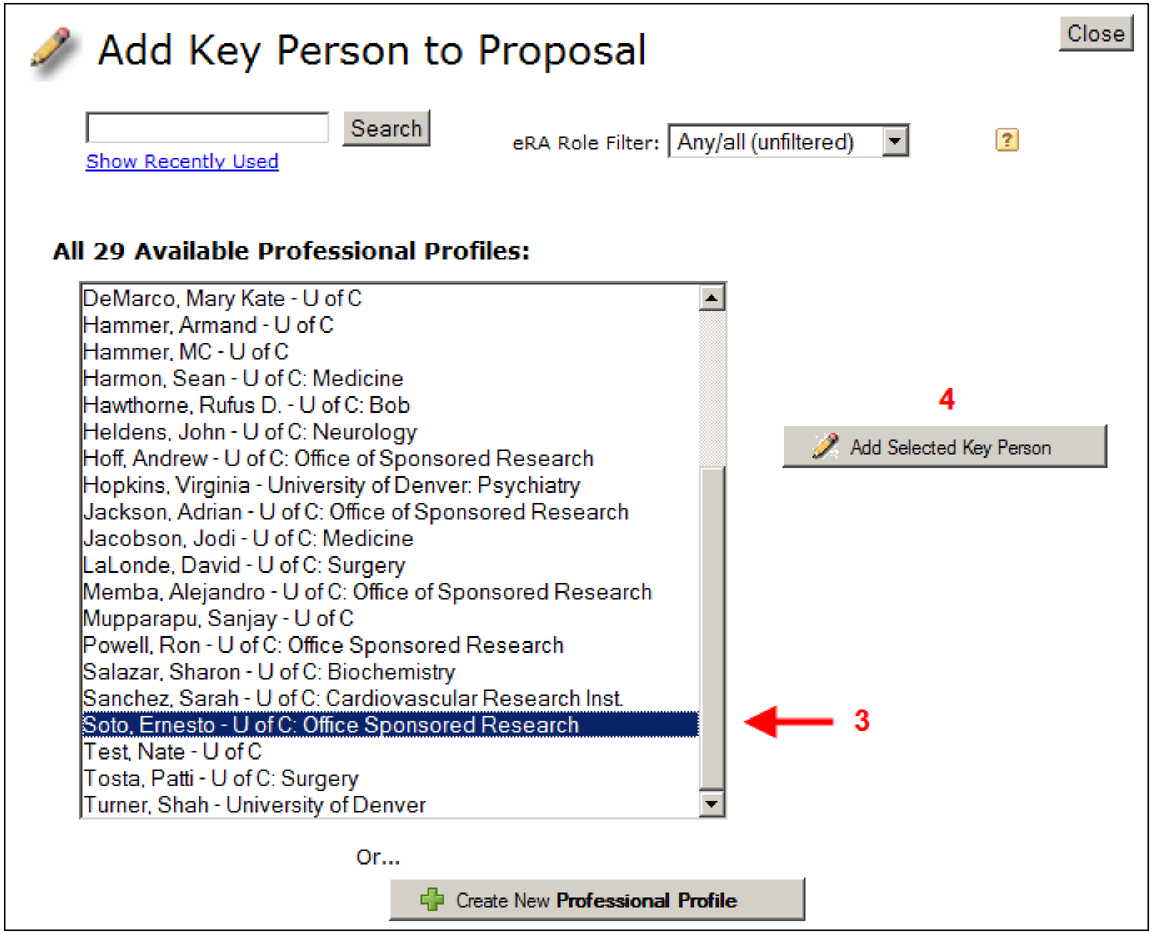
2. Click the autofill icon to add a new person.



Autofill: Senior/Key Persons

3. Search for or select the person you want to add.

4. Click **Add Selected Key Person**.



Autofill: Senior/Key Persons

5. Key person data can be edited in the Manage Key Person window:

Manage Key Person

Close

Soto, Ernesto - University of Cayuse — budget periods: ☑ 1 ☑ 2 ☐ 3 ☐ 4 ☐ 5

Attach Biosketch (no pdf) (no src) Add

Role: Faculty — **Other Project Role Category:**

Appointment type (months): Calendar: 12 Academic: Summer:

Budget	Cal. Salary	Acad. Salary	Sum. Salary	Cal. Months	Acad. Months	Sum. Months	Req. Salary	Fringe Benefits	Funds Requested
prd 1	65,000	0	0	4.00			21,667	0	21,667
prd 2	67,000	0	0	2.00			11,167	1,000	12,167
prd 3									
prd 4									
prd 5									

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Autofill: Senior/Key Persons

In the Manage Key Persons window you can:

- Re-autofill from a professional profile.
- Change the Project Role.
- Select budget periods on which the Key Person will be named by checking or un-checking the **Budget Period** boxes.
- Attach biosketches.
- Change effort and salary information.
- Copy salary information across budget periods or automatically escalate it.

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Autofill: Senior/Key Persons

- If you enter base salary numbers, fringe rates, and effort months, KC S2S auto-calculates **Requested Salary**, **Fringe Benefits** and **Funds Requested**.

Manage Key Person

Close

Soto, Ernesto - University of Cayuse

budget periods: ☑ 1 ☑ 2 ☐ 3 ☐ 4 ☐ 5

Attach Biosketch (no pdf) (no src) Add

Role: Faculty

Other Project Role Category:

Appointment type (months): Calendar: 12 Academic: Summer:

Budget	Cal. Salary	Acad. Salary	Sum. Salary	Cal. Months	Acad. Months	Sum. Months	Req. Salary	Fringe Benefits	Funds Requested
prd 1	65,000	0	0	4.00			21,667	0	21,667
prd 2	67,000	0	0	2.00			11,167	1,000	12,167
prd 3									
prd 4									
prd 5									

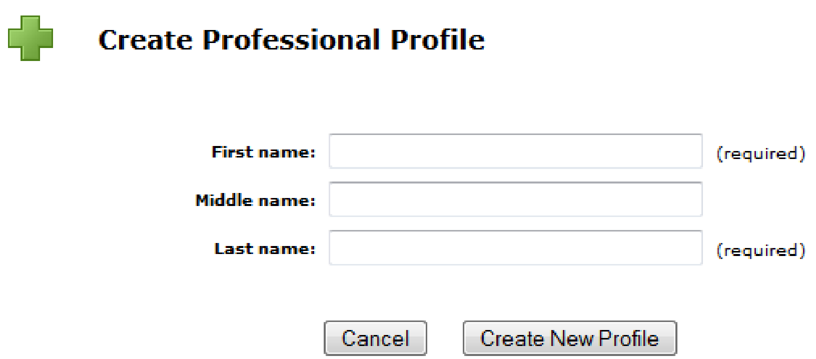
Adding Senior/Key Persons "On the Fly"

Adding a Senior/Key Person "on the fly" allows you to quickly create a Professional Profile from within the proposal.

1. From the **Key Persons** form (or the Key Persons section of the detailed budget form), click the autofill pencil .

2. Click the **Create New Professional Profile** button in the Add Key Person window:

3. Enter the first and last names and click the **Create New Profile** button:

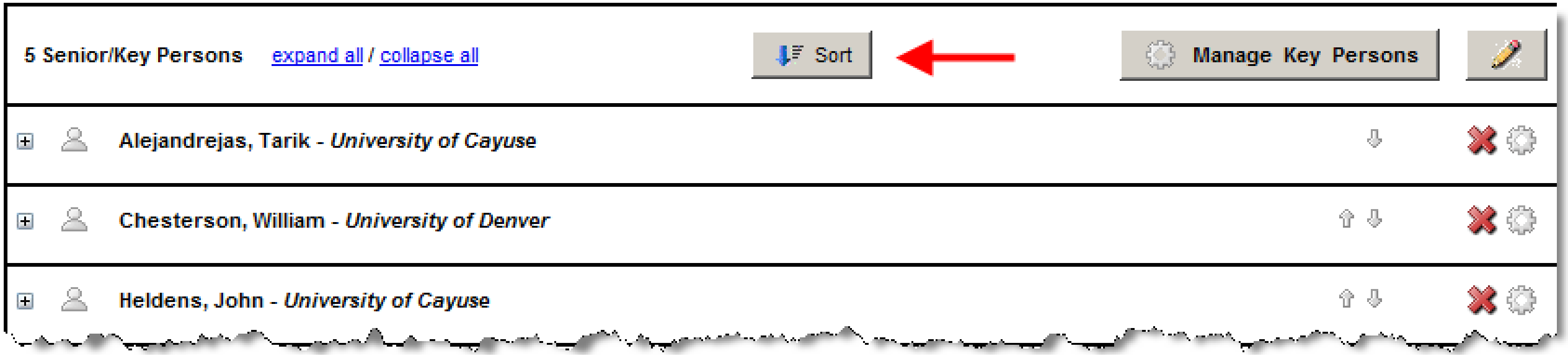


Adding Senior/Key Persons "On the Fly"

4. Fill out the **Create New Key Person** form and click the **Save Key Person** button.
5. A professional profile will be created and the person will be added to the Senior/Key Persons form and the budget form.

Sorting Senior/Key Persons

- Once you have added all key persons, click the **Sort** button to order your list.
  - PD/PI roles will appear first.
  - OSC roles will appear last.
  - Other people will be in alphabetical order.



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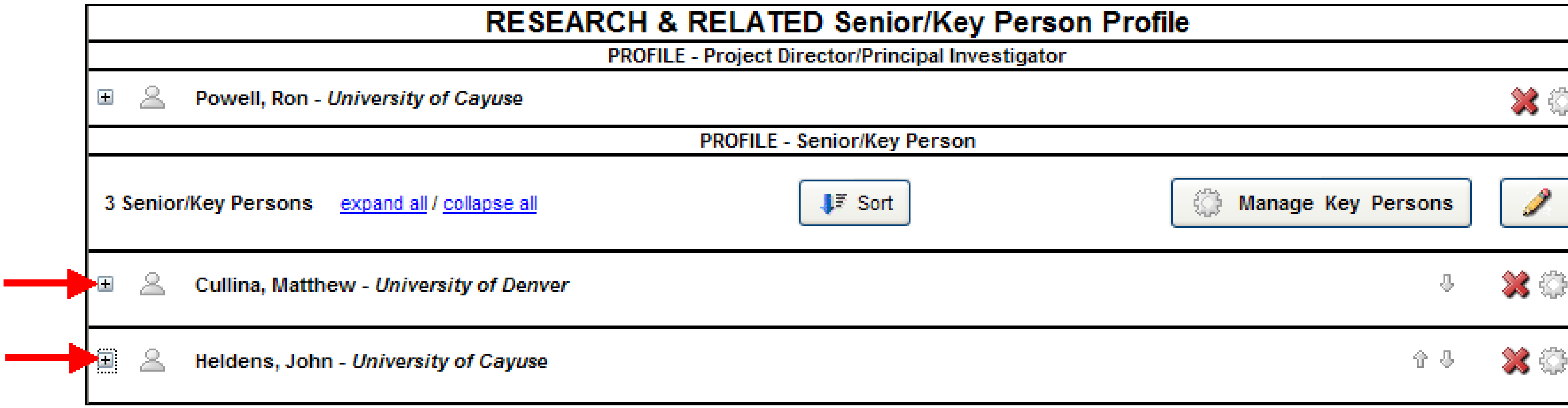
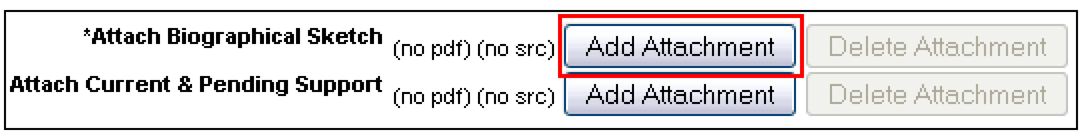
Attaching Biosketches

1. Expand the key person's listing by clicking on the plus sign:



1. Click **Add Attachment** next to Attach Biographical Sketch:

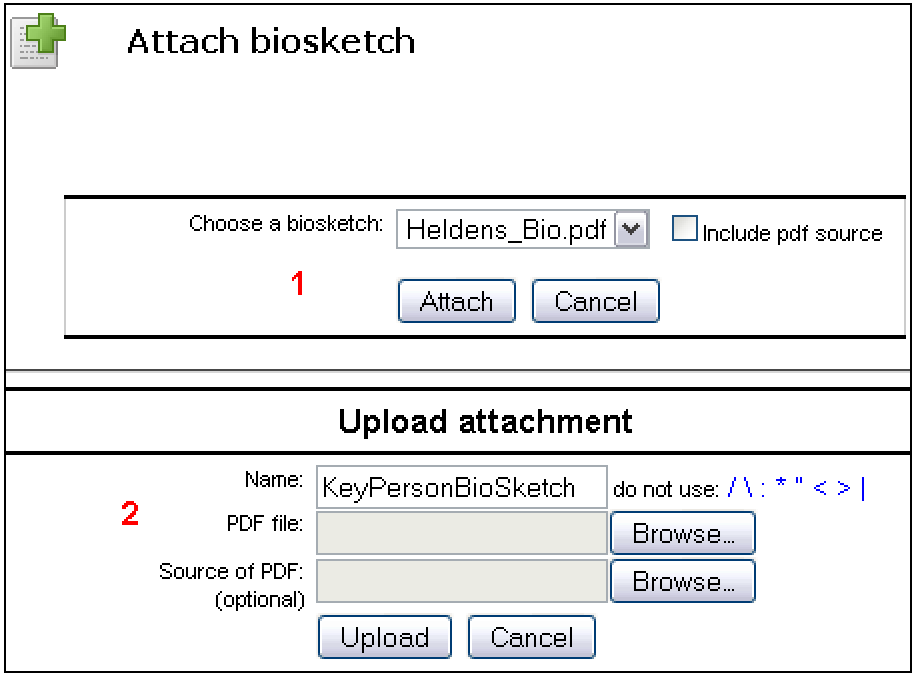


Attaching Biosketches to the Proposal

3. From the **Attach Biosketch** window, you can attach the PDF and the Source (Word) file from:

    1. The professional profile (top)

    2. A file on your local computer (bottom)



Conclusion

In this module you have learned how to:

- Autofill data into the proposal
- Add Performance Sites
- Add and sort Key Persons
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