

Developing Your Proposal


Module 5

Objectives


In this module you will learn how to:


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

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, Cayuse S2S also autofills other logically connected fields.
 - Applicant Organization and Principal Investigator data are usually autofilled during proposal creation.

Using Autofill

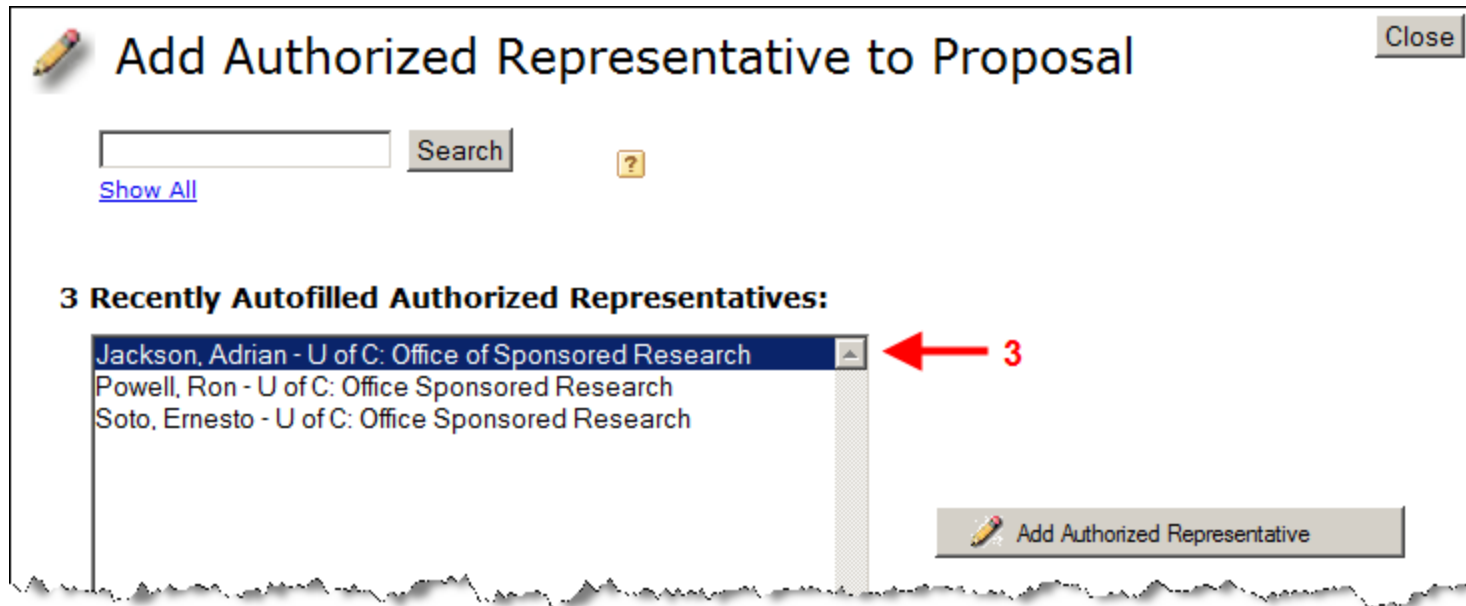
1. Locate the section of the proposal you would like to autofill (e.g. Authorized Representative – Box 19 on the SF 424 Face Page).
2. Click the autofill pencil: 


19. Authorized Representative 1 **2** 

Prefix:	* First Name:	Middle Name:	* Last Name:	Suffix:
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
* Position/Title:	<input type="text"/>	* Organization:	<input type="text"/>	
Department:	<input type="text"/>	Division:	<input type="text"/>	
* Street1:	<input type="text"/>	Street2:	<input type="text"/>	
* City:	<input type="text"/>	County:	<input type="text"/>	
* State/Province:	<input type="text" value="Please Select..."/>	* Zip/Postal Code:	<input type="text"/>	
* Country:	<input type="text" value="Please Select..."/>			
* Phone Number:	<input type="text"/>	Fax Number:	<input type="text"/>	* Email:
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
* Signature of Authorized Representative	<input type="text"/>			* Date Signed
	<input type="text"/>			<input type="text"/>

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**.



 Add Authorized Representative to Proposal Close


Search ?

[Show All](#)

3 Recently Autofilled Authorized Representatives:

- Jackson, Adrian - U of C: Office of Sponsored Research**
- Powell, Ron - U of C: Office Sponsored Research
- Soto, Ernesto - U of C: Office Sponsored Research

3

 Add Authorized Representative

Using Autofill

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



19. Authorized Representative ✕ 🗄

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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:	503-123-4567	Fax Number:	503-765-4321	* Email:	jcolley@cayuse.com
* Signature of Authorized Representative				* Date Signed	

Autofill: Performance Sites

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

Project/Performance Site Location(s)	
Project/Performance Site Primary Location  	
Organization:	<input type="text"/>
DUNS Number:	<input type="text"/>
* Street1:	<input type="text"/>
* City:	<input type="text"/>
* State/Province: Please Select...	<input type="text"/>
* Country: Please Select...	<input type="text"/>
* Project/Performance Site Congressional District:	<input type="text"/>
Street2:	<input type="text"/>
County/Parish:	<input type="text"/>
* Zip/Postal Code:	<input type="text"/>

2. Select a site from a professional profile:



Primary Performance Site Autofill

Also show available **Institutional Profiles**




University of Cayuse - Barton, Jeffrey [PI]

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:

University of Cayuse

Performance Site Active 

Organization Name:

Address 1:

Address 2:

City:

State/Province:

Zip/Postal Code:

County:

Country:

Organization DUNS:







Congressional District:

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
 - Cayuse 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.

Autofill: Senior/Key Persons

1. Navigate to the **Key Persons** form.
2. Click the autofill icon to add a new person.

RESEARCH & RELATED Senior/Key Person Profile	
PROFILE - Project Director/Principal Investigator	
  Powell, Ron - <i>University of Cayuse</i>	 
PROFILE - Senior/Key Person	
0 Senior/Key Persons expand all / collapse all	 Manage Key Persons 

2 ←

Autofill: Senior/Key Persons

3. Search for or select the person you want to add.
4. Click **Add Selected Key Person**.

Add Key Person to Proposal Close

Search Show Recently Used eRA Role Filter: Any/all (unfiltered) ?

All 29 Available Professional Profiles:


- DeMarco, Mary Kate - U of C
- Hammer, Armand - U of C
- Hammer, MC - U of C
- Harmon, Sean - U of C: Medicine
- Hawthorne, Rufus D. - U of C: Bob
- Heldens, John - U of C: Neurology
- Hoff, Andrew - U of C: Office of Sponsored Research
- Hopkins, Virginia - University of Denver: Psychiatry
- Jackson, Adrian - U of C: Office of Sponsored Research
- Jacobson, Jodi - U of C: Medicine
- LaLonde, David - U of C: Surgery
- Memba, Alejandro - U of C: Office of Sponsored Research
- Mupparapu, Sanjay - U of C
- Powell, Ron - U of C: Office Sponsored Research
- Salazar, Sharon - U of C: Biochemistry
- Sanchez, Sarah - U of C: Cardiovascular Research Inst.
- Soto, Ernesto - U of C: Office Sponsored Research**
- Test, Nate - U of C
- Tosta, Patti - U of C: Surgery
- Turner, Shah - University of Denver



4 Add Selected Key Person

Or... Create New Professional Profile

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: Other Project Role Category:

Appointment type (months): Calendar: 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									


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.

Autofill: Senior/Key Persons

- If you enter base salary numbers, fringe rates, and effort months, Cayuse 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)


Role: **Other Project Role Category:**

Appointment type (months): Calendar: 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:



Create Professional Profile

First name: (required)

Middle name:

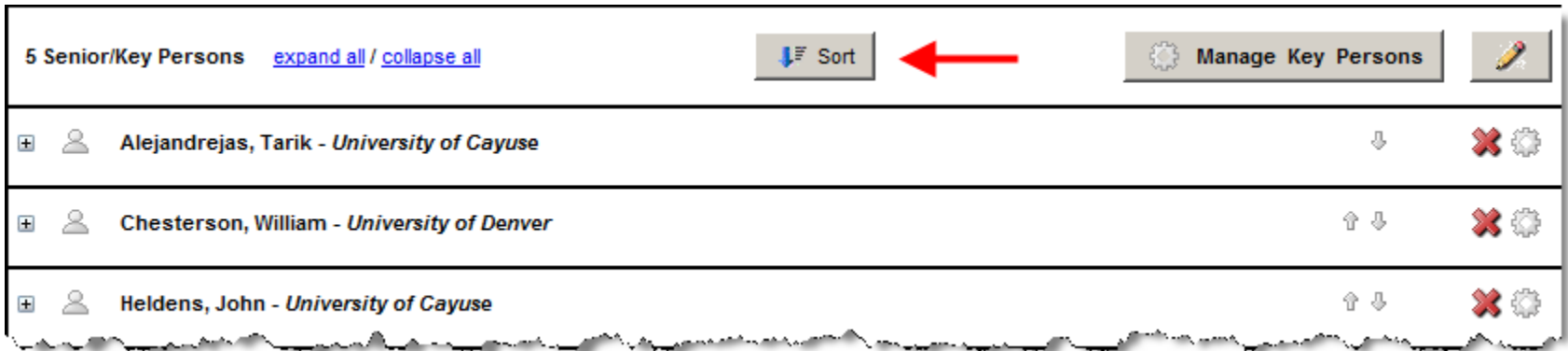
Last name: (required)

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.



The screenshot shows a web interface for managing Senior/Key Persons. At the top, there is a header bar with the text "5 Senior/Key Persons" and links for "expand all" and "collapse all". To the right of the header are three buttons: "Sort" (with a dropdown arrow icon), "Manage Key Persons" (with a gear icon), and an edit icon (pencil). A red arrow points to the "Sort" button. Below the header is a table with three rows, each representing a person. Each row has a plus icon, a person icon, the person's name and affiliation, and a set of control icons (up/down arrows, a red X, and a gear).

5 Senior/Key Persons		expand all / collapse all		Sort		Manage Key Persons		Edit	
+		Alejandrejas, Tarik - <i>University of Cayuse</i>	↓	✖	⚙️				
+		Chesterson, William - <i>University of Denver</i>	↑ ↓	✖	⚙️				
+		Heldens, John - <i>University of Cayuse</i>	↑ ↓	✖	⚙️				

Attaching Biosketches

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

RESEARCH & RELATED Senior/Key Person Profile
PROFILE - Project Director/Principal Investigator

⊕ Powell, Ron - University of Cayuse

PROFILE - Senior/Key Person

3 Senior/Key Persons [expand all](#) / [collapse all](#) Sort Manage Key Persons

⊕ Cullina, Matthew - University of Denver ↓

⊕ Heldens, John - University of Cayuse ↑ ↓

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

*Attach Biographical Sketch (no pdf) (no src) **Add Attachment** Delete Attachment

Attach Current & Pending Support (no pdf) (no src) Add Attachment Delete Attachment

Attaching Biosketches to the Proposal

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

- The professional profile (top)
- A file on your local computer (bottom)

The image shows two overlapping windows from a software interface. The top window is titled "Attach biosketch" and contains a dropdown menu with "Heldens_Bio.pdf" selected, a checkbox for "Include pdf source", and "Attach" and "Cancel" buttons. A red number "1" is placed below the dropdown. The bottom window is titled "Upload attachment" and contains a "Name:" field with "KeyPersonBioSketch", a "PDF file:" field with a "Browse..." button, a "Source of PDF: (optional)" field with a "Browse..." button, and "Upload" and "Cancel" buttons. A red number "2" is placed to the left of the "Name:" field. A warning message "do not use: / \ : * \" < > |" is visible to the right of the "Name:" field.