Module 5
Proposal Basics
Objectives

- In this module you will learn how to:
  - Autofill data into the proposal
  - Add Performance Sites
  - Add UCR and non-UCR Key Personnel
  - Sort Key Personnel
  - Attach Biosketches
  - Use the Targeted Plan and Inclusion Enrollment forms
AutoFill Functionality

- Use the 🖌 icon to autofill fields
- Autofilled information is extracted from either the Professional or Institutional Profile(s)
- If profile information changes during the proposal preparation process, you can autofill again to import the most recent information
- When you autofill certain sections, Cayuse424 also autofills other logically-connected fields
- When the proposal is created and displayed for the first time:
  - Applicant Organization data has already been autofilled
  - Principal Investigator data has already been autofilled
Using the Autofill Function

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

2. Click the 🆐 icon
3. Select the appropriate data to be autofilled
4. Click **Close Autofill Window**
Using the Autofill Function

5. Notice data has been autofilled into section
Adding Performance Sites

1. Upon proposal creation the Project/Performance Site Primary Location will be partially auto-filled already.

2. If adding a new site, complete the form manually or...

3. Add a pre-existing Performance Site by selecting the **Autofill Pencil** and Key Person.
Adding Performance Sites

- Performance sites can be added and made “Active” within each Professional Profile to be autofilled.
Senior/Key Persons Page

- Provides the ability to add/autofill/edit and delete Senior/Key Persons
- Allows you to add as many Senior/Key Persons as you need
- Handles the overflow (8 or 40) by auto-generating an overflow PDF and attaching it to the proposal
- Provides a sort button that automatically alphabetizes the final list
- Autofills Senior/Key persons and salary information on the budget pages when you add them on the SF424 Key Persons page
Adding Senior/Key Persons

1. Navigate to the **SF424 RR Key Persons** page
2. Click the pencil icon to add a new person
Adding Senior/Key Persons

3. Ensure the eRA Role Filter is set at “Any/all (unfiltered)”

4. Scroll down and select the Professional Profile you wish to add

5. Click Add Selected Key Person

Note: When adding non-UCR personnel to a proposal, select “#1, Non-UCR Key Personnel” (found by searching under “#”) to auto-fill the proposal, then overwrite-complete with actual information. To add additional non-UCR personnel, repeat steps 3-5 but select the next sequential non-UCR Key Personnel Profile.
5. The selected key person may now be modified within the Manage Key Person window.

![Manage Key Person](image_url)

<table>
<thead>
<tr>
<th>Role</th>
<th>Faculty</th>
<th>Other Project Role Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>Appointment type (months):</td>
<td>Calendar: 12</td>
<td>Academic:</td>
</tr>
<tr>
<td>prd 1</td>
<td>65,000</td>
<td>0</td>
</tr>
<tr>
<td>prd 2</td>
<td>67,000</td>
<td>0</td>
</tr>
</tbody>
</table>
Adding Senior/Key Persons

- In the Manage Key Persons window you can:
  - Autofill from a Professional Profile
  - Edit Role
  - Define budget periods during which Key Person will be named in the grant. By checking or un-checking the **Budget Period** boxes you can control whether or not the name and salary information autofills onto the budget page
  - Attach biosketch
  - Edit appointment type and salary
  - Escalate salary
  - Enter level of effort
Once you enter level of effort, Cayuse424 auto-calculates **Requested Salary**, **Fringe Benefits** and **Funds Requested**.

You can also manually input this information into the budget page for each budget period (see **Budget** module for details).

**Manage Key Person**
NOTE: Professional Profiles should NOT be created for non-UCR personnel such as subaward personnel. To add non-UCR personnel to a proposal, please follow the steps provided in slides 10 and 11 of this training Module 6.

- Adding a UCR Senior/Key Person “On-the-Fly” allows you to quickly create a Professional Profile from within the proposal

1. From the **SF424 RR Key Person** page (or **Detailed Budget** page), click the icon to add a new person.

2. Click the **Create New Professional Profile** button in the Add Key Person window.
Adding UCR Senior/Key Persons “On-the-Fly”

3. Enter First and Last Name
4. Click the **Create New Profile** button
5. Fill out the Create New Key Person form and click the Save Key Person button.

6. A Professional Profile will be created in addition to the Key Person being added to the Senior/Key Person page and Detailed Budget page.

**NOTE:** After you have created a new Professional Profile, please notify your UCR Sponsored Programs point of contact to link the UCR Professional Profile to a new Cayuse user account which will grant the UCR personnel user access to Cayuse424.
Sorting Senior/Key Persons

☐ Once you have added all key persons, click the **Sort** button to alphabetize your list. Key Persons will be sorted first while Other Significant Contributors will appear at the bottom of the list.
Attaching Biosketches to the Proposal

1. Navigate to the **SF424 RR Key Persons** page
2. Expand the Key Person Profile and use the **Add Attachment** button to upload a Biosketch
Attaching Biosketches to the Proposal

- The **Attach Biosketch** window enables you to attach the PDF and the Source (Word) file from the:
  1. Professional Profile
  2. Another location using the Browse button
Targeted/Planned Enrollment Table

- Automatically calculates the totals
- Uploads this form in PDF format to the Research Plan section of the grant proposal
- The checkbox on the navigation bar must be checked in order to send this form to Grants.gov
Inclusion Enrollment Report

- Automatically calculates the totals
- Uploads this form in PDF format to the Research Plan section of the grant proposal
- The checkbox on the navigation bar must be checked in order to send this form to Grants.gov
Overriding the Enrollment Tables

- There may be occasions when you have completed the enrollment tables separately; or you have multiple pages of each enrollment table.
- When this is the case you may override the generated attachment and attach your own document(s).
- When uploading your own Enrollment tables make sure you uncheck the inclusion box to ensure your uploaded forms are submitted, rather than the generated forms.
Overriding the Enrollment Tables

1. Navigate to the **Research Plan** page in Cayuse424
2. Click the **Override** button next to the appropriate Enrollment table
Enrollment Forms

3. Click the **Browse** button to locate the appropriate Enrollment table and click **Open**

4. Click **Upload**

- Enrollment table is now attached
Conclusion

- In this module you have learned how to:
  - Autofill data into the proposal
  - Add Performance Sites
  - Add and Sort Key Personnel
  - Attach Biosketches
  - Use the Targeted Plan and Inclusion Enrollment forms