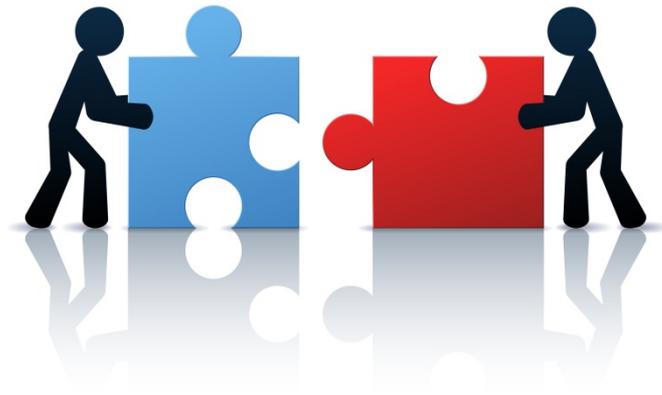


1

# Module 5

## Proposal Basics



# Objectives

2

- 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

3

- 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

4

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

**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"/>
* Signature of Authorized Representative	<input type="text"/>			* Date Signed <input type="text"/>

# Using the Autofill Function

5

3. Select the appropriate data to be autofilled
4. Click **Close Autofill Window**



Add Authorized Representative to Proposal

Close

Search

eRA Role Filter: Signing Official / AOR



[Show Recently Used](#)

**All 8 Available Professional Profiles w/role *Signing Official / AOR*:**

Chan, Robert - UC Riverside: Vice Chancellor - Research  
Ellis, Teeny - UC Riverside: Vice Chancellor - Research  
Greer, Charles -Jr - UC Riverside: Vice Chancellor - Research  
LeFort, Tim - UC Riverside: Vice Chancellor - Research  
Lindo, Myrna - UC Riverside: Vice Chancellor - Research  
Miller, Caron - UC Riverside: Vice Chancellor - Research  
Prins, Ursula - UC Riverside: Vice Chancellor - Research  
Wells, Cynthia - UC Riverside: Vice Chancellor - Research



Add Authorized Representative

# Using the Autofill Function

6

## 5. Notice data has been autofilled into section

19. Authorized Representative ✖ ☑

Prefix:	* First Name:	Middle Name:	* Last Name:	Suffix:
<input type="text"/>	<input type="text" value="Robert"/>	<input type="text"/>	<input type="text" value="Chan"/>	<input type="text"/>
* Position/Title:	<input type="text" value="Senior Contract &amp; Grant Officer"/>		* Organization:	<input type="text" value="The Regents of the University of California"/>
Department:	<input type="text" value="Vice Chancellor - Research"/>		Division:	<input type="text" value="Office of Research Affairs"/>
* Street1:	<input type="text" value="200 University Office Bldg."/>		Street2:	<input type="text" value="Sponsored Programs Administration"/>
* City:	<input type="text" value="Riverside"/>		County:	<input type="text" value="Riverside"/>
* State/Province:	<input type="text" value="California"/>		* Zip/Postal Code:	<input type="text" value="92521-0217"/>
* Country:	<input type="text" value="United States of America"/>			
* Phone Number:	Fax Number:	* Email:		
<input type="text" value="(951) 827-7986"/>	<input type="text" value="(951) 827-4483"/>	<input type="text" value="robert.chan@ucr.edu"/>		
* Signature of Authorized Representative	<input type="text"/>		* Date Signed	<input type="text"/>

# Adding Performance Sites

7

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

Project/Performance Site Location(s)	
Project/Performance Site Primary Location  	
Organization: <input type="text" value="Enter Manually or Autofill"/>	
DUNS Number: <input type="text"/>	
* Street1: <input type="text"/>	Street2: <input type="text"/>
* City: <input type="text"/>	* County/Parish: <input type="text"/>
* State/Province: <input type="text" value="Please Select.."/>	* Zip/Postal Code: <input type="text"/>
* Country: <input type="text" value="Please Select.."/>	
* Project/Performance Site Congressional District: <input type="text"/>	
Other sites <a href="#">expand all</a> / <a href="#">collapse all</a>	 

# Adding Performance Sites

8

- Performance sites can be added and made “Active” within each Professional Profile to be autofilled

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 Page

9

- 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

10

1. Navigate to the **SF424 RR Key Persons** page
2. Click the pencil 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 <a href="#">expand all</a> / <a href="#">collapse all</a>	 <b>Manage Key Persons</b> 

2



# Adding Senior/Key Persons

11

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.

Add Key Person to Proposal **3** Close

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

**All 942 Available Professional Profiles:**

**4** #1, Non-UCR Key Personnel - N/A  
#2, Non-UCR Key Personnel - N/A  
#3, Non-UCR Key Personnel - N/A  
#4, Non-UCR Key Personnel - N/A  
#5, Non-UCR Key Personnel - N/A  
#6, Non-UCR Key Personnel - N/A  
#7, Non-UCR Key Personnel - N/A  
#8, Non-UCR Key Personnel - N/A  
#9, Non-UCR Key Personnel - N/A  
Abbaschian, Reza - UC Riverside: Bourns College of Engineering  
Abdulrazak, Khaleel - UC Riverside: Coll of Hum, Arts & Social Sci  
Adams, Michael - UC Riverside: College of Nat & Agr Sciences  
Adaskaveg, Jim - UC Riverside: College of Nat & Agr Sciences  
Aguero, Jorge - UC Riverside: Coll of Hum, Arts & Social Sci  
Aguilar, Guillermo - UC Riverside: Bourns College of Engineering  
Ai, Huiwang - UC Riverside: College of Nat & Agr Sciences  
Aji, Vivek - UC Riverside: College of Nat & Agr Sciences  
Alcocer, Michelle - UC Riverside: College of Nat & Agr Sciences  
Alexander, Michael - UC Riverside: Coll of Hum, Arts & Social Sci  
Alii, Muhamad - UC Riverside: Coll of Hum, Arts & Social Sci

**5** Add Selected Key Person

Or...  
Create New Professional Profile



# Adding Senior/Key Persons

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- 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



# Adding UCR Senior/Key Persons “On-the-Fly”

15

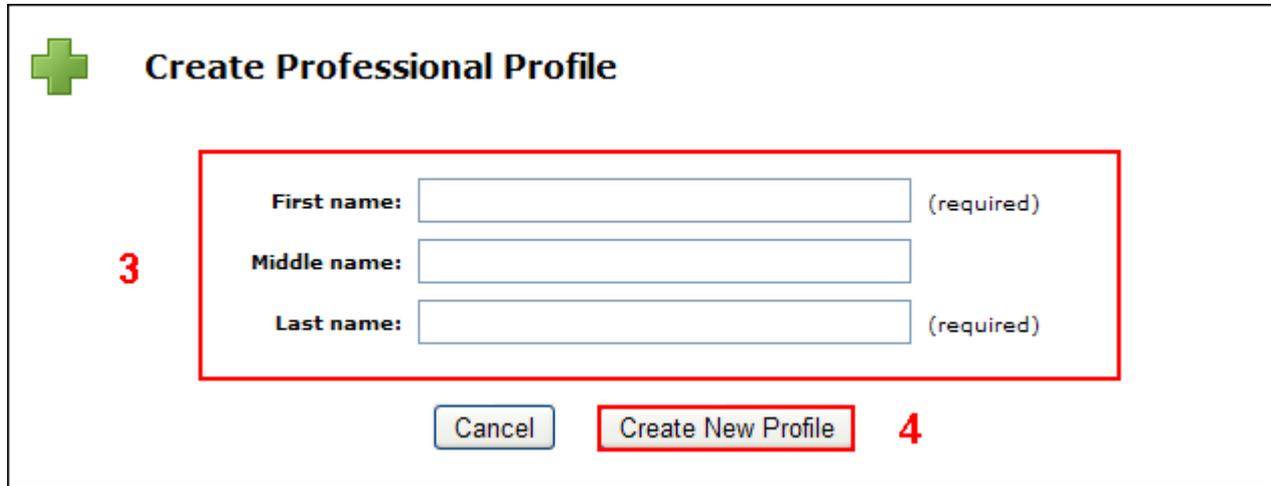
**NOTE:** Professional Profiles should NOT be created for non-UCR personnel such as subaward personnel. To add non-UCR personnel to a proposal, please follow the steps provided in slides 10 and 11 of this training Module 6.

- 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”

16

3. Enter First and Last Name
4. Click the **Create New Profile** button



The screenshot shows a web form titled "Create Professional Profile" with a green plus icon. The form contains three input fields: "First name:" (required), "Middle name:", and "Last name:" (required). A red box highlights these three fields, with a red number "3" to its left. Below the fields are two buttons: "Cancel" and "Create New Profile". The "Create New Profile" button is highlighted with a red box, and a red number "4" is placed to its right.

**3**

**4**

# Adding UCR Senior/Key Persons “On-the-Fly”

17

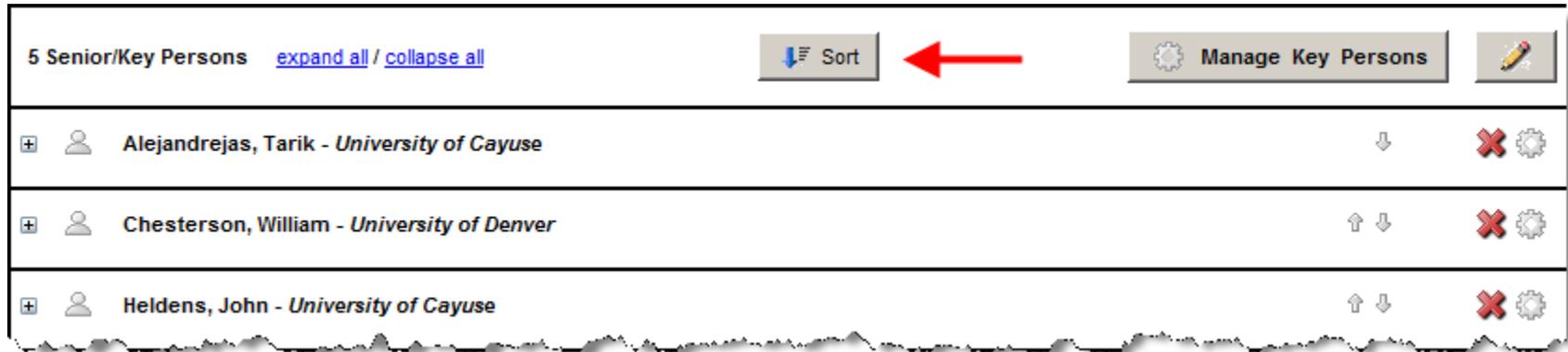
5. Fill out the **Create New Key Person** form and click the **Save Key Person** button
6. A Professional Profile will be created in addition to the Key Person being added to the **Senior/Key Person** page and **Detailed Budget** page

**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.

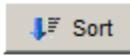
# Sorting Senior/Key Persons

18

- 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.



The screenshot displays a user interface for managing a list of Senior/Key Persons. At the top, it shows "5 Senior/Key Persons" with links for "expand all" and "collapse all". To the right are buttons for "Sort" (with a red arrow pointing to it), "Manage Key Persons", and a pencil icon. Below this is a list of three individuals, each with a plus icon, a person icon, their name and affiliation, and action icons (up/down arrows, a red X, and a gear).

5 Senior/Key Persons		<a href="#">expand all</a> / <a href="#">collapse all</a>	 Sort		
		Alejandrejas, Tarik - <i>University of Cayuse</i>	↓		
		Chesterson, William - <i>University of Denver</i>	↑ ↓		
		Heldens, John - <i>University of Cayuse</i>	↑ ↓		

# Attaching Biosketches to the Proposal

19

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

The screenshot displays the 'RESEARCH & RELATED Senior/Key Person Profile' page. The profile is for 'Powell, Ron - University of Cayuse'. Below this, there is a section for 'PROFILE - Senior/Key Person' which lists 3 Senior/Key Persons. The list includes 'Cullina, Matthew - University of Denver' and 'Heldens, John - University of Cayuse'. Red arrows point to the expand/collapse icons for these two entries, with the number '2' next to the arrow pointing to the 'Heldens, John' entry. Below the list, there is an attachment interface with two sections: '\*Attach Biographical Sketch' and 'Attach Current & Pending Support'. Each section has an 'Add Attachment' button (highlighted with a red box) and a 'Delete Attachment' button.

RESEARCH & RELATED Senior/Key Person Profile	
PROFILE - Project Director/Principal Investigator	
Powell, Ron - University of Cayuse	
PROFILE - Senior/Key Person	
3 Senior/Key Persons <a href="#">expand all</a> / <a href="#">collapse all</a>	Sort  Manage Key Persons
Cullina, Matthew - University of Denver	
Heldens, John - University of Cayuse	

\*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

20

- 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

The image shows two overlapping windows from a software interface. The top window is titled "Attach biosketch" and features a green plus icon in the top-left corner. It contains a dropdown menu labeled "Choose a biosketch:" with "Heldens\_Bio.pdf" selected. To the right of the dropdown is an unchecked checkbox labeled "Include pdf source". Below these elements are two buttons: "Attach" and "Cancel". A red number "1" is positioned to the left of the "Attach" button. The bottom window is titled "Upload attachment" and contains a text input field for "Name:" with the value "KeyPersonBioSketch". To the right of this field is a warning message: "do not use: / \ : \* \" < > |". Below the name field are two "Browse..." buttons, one for "PDF file:" and one for "Source of PDF: (optional)". At the bottom of this window are "Upload" and "Cancel" buttons. A red number "2" is positioned to the left of the "Name:" field.

# Targeted/Planned Enrollment Table

21

- 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

☑ PHS 398 Research Plan  
1

**☑ Targeted/Planned Enrollment**  
1

☐ Inclusion Enrollment Report  
1

☑ PHS 398 Checklist  
1  
2

☐ PHS 398 Cover Letter  
1

**Proposal Summary**  
Summary  
Documents  
Federal Reporting

**Proposal Management**  
 Permissions  
 Routing & Approval  
 Electronic Submission

# Inclusion Enrollment Report

22

- 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

☑ PHS 398 Research Plan  
1

☐ Targeted/Planned Enrollment  
1

**☑ Inclusion Enrollment Report**  
1

☑ PHS 398 Checklist  
1  
2

☐ PHS 398 Cover Letter  
1

**Proposal Summary**  
Summary  
Documents  
Federal Reporting

**Proposal Management**  
 Permissions  
 Routing & Approval  
 Electronic Submission

# 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

24

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

9. Inclusion of Women and Minorities	(no pdf) (no src)	Add	Delete
10. Targeted/Planned Enrollment Table	<b>2</b> <a href="#">View Generated Attachment</a>	<b>Override</b>	Revert
11. Inclusion of Children	(no pdf) (no src)	Add	Delete

# Enrollment Forms

25

3. Click the **Browse** button to locate the appropriate Enrollment table and click **Open**
  4. Click **Upload**
- Enrollment table is now attached

Upload attachment

Name: TargetPlannedEnrollme

3 PDF file:  Browse...

Source of PDF: (optional)  Browse...

4 Upload Cancel

# Conclusion

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- 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