Developing Your Proposal

Module 6

Research Suite Product Support
ResearchSuiteSupport@Evisions.com
In this module you will learn how to:

- Autofill data into the proposal
- Add Performance Sites
- Add and sort Key Persons
- Attach biosketches
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 424 also autofills other logically connected fields.

- Applicant Organization and Principal Investigator data are usually autofilled during proposal creation.
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: 🆕

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Using Autofill

[Diagram of the autofocus section of a form, with fields for prefix, first name, middle name, last name, position/title, department, street1, city, state/province, country, phone number, fax number, organization, division, street2, county, zip/postal code, signature of authorized representative, and date signed.]
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**.
5. The person’s data is autofilled into Box 19:

**19. Authorized Representative**

- **Prefix:** Mr.
- **First Name:** Andrew
- **Middle Name:**
- **Last Name:** Hoff
- **Suffix:**
- **Position/Title:** Director
- **Department:** Office of Sponsored Research
- **Street1:** 10700 SW Beaverton-Hillsdale Hwy.
- **City:** Beaverton
- **State/Province:** Oregon
- **Country:** United States of America
- **Organization:** University of Cayuse
- **Division:** Office of Research
- **Street2:** Bldg. II, Ste. 4
- **County:** Washington
- **Zip/Postal Code:** 97005
- **Phone Number:** 503-123-4567
- **Fax Number:** 503-765-4321
- **Email:** jcolley@cayuse.com
- **Signature of Authorized Representative:**
- **Date Signed:**
1. Add an existing performance site by selecting the autofill pencil.

2. Select a site from a professional profile:
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:
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 424 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.
1. Navigate to the **Key Persons** form.

2. Click the autofill icon to add a new person.
3. Search for or select the person you want to add.

4. Click Add Selected Key Person.
5. Key person data can be edited in the Manage Key Person window:
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 (see Module 7 – Proposal Budgets).
- Change the Key Person’s appointment type.
- Include/exclude a Key Person’s active Performance Site.
If you enter base salary numbers, fringe rates, and effort months, Cayuse 424 auto-calculates **Requested Salary, Fringe Benefits** and **Funds Requested**.
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:
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.
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.

<table>
<thead>
<tr>
<th>5 Senior/Key Persons</th>
<th>expand all / collapse all</th>
<th>Sort</th>
<th>Manage Key Persons</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alejandro, Tarik - University of Cayuse</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Chesterson, William - University of Denver</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Heldens, John - University of Cayuse</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
1. Expand the key person’s listing by clicking on the plus sign:

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

\[\text{Attaching Biosketches}\]
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)
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