



Developing Your Proposal

Module 6

Research Suite Product Support
ResearchSuiteSupport@Evisions.com

cayuse 424
Electronic Proposal
Development and Submission





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 424 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 

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

 Add Authorized Representative

Using Autofill



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

19. Authorized Representative 5 ✕ 🗄


Prefix: <input type="text" value="Mr."/> ▼	* First Name: <input type="text" value="Andrew"/>	Middle Name: <input type="text"/>	* Last Name: <input type="text" value="Hoff"/>	Suffix: <input type="text"/> ▼
* Position/Title: <input type="text" value="Director"/>		* Organization: <input type="text" value="University of Cayuse"/>		
Department: <input type="text" value="Office of Sponsored Research"/>		Division: <input type="text" value="Office of Research"/>		
* Street1: <input type="text" value="10700 SW Beaverton-Hillsdale Hwy."/>		Street2: <input type="text" value="Bldg. II, Ste. 4"/>		
* City: <input type="text" value="Beaverton"/>		County: <input type="text" value="Washington"/>		
* State/Province: <input type="text" value="Oregon"/> ▼		* Zip/Postal Code: <input type="text" value="97005"/>		
* Country: <input type="text" value="United States of America"/> ▼				
* Phone Number: <input type="text" value="503-123-4567"/>		Fax Number: <input type="text" value="503-765-4321"/>	* Email: <input type="text" value="jcolley@cayuse.com"/>	
* Signature of Authorized Representative <input type="text"/>			* Date Signed <input type="text"/>	

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:	<input type="text" value="Please Select..."/>
* Country:	<input type="text" value="Please Select..."/>
* 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**

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:

U of Cayuse School of Minds (Anesthesia and Perioperative)

Performance Site ☒ Active Fill from Contact/Org Info

Organization Name: University of Cayuse

Street 1: 10700 SW Beaverton-Hillsdale Hwy.

Street 2: Bldg. I, Ste. 700

City: Beaverton

State/Province: Oregon

Zip/Postal Code: 97005-0001

County: Washington

Country: United States of America

Organization DUNS: 090993098





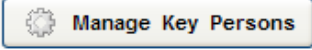

Congressional District: OR-003

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 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.

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 - University of Cayuse	 
PROFILE - Senior/Key Person	
0 Senior/Key Persons expand all / collapse all	  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:

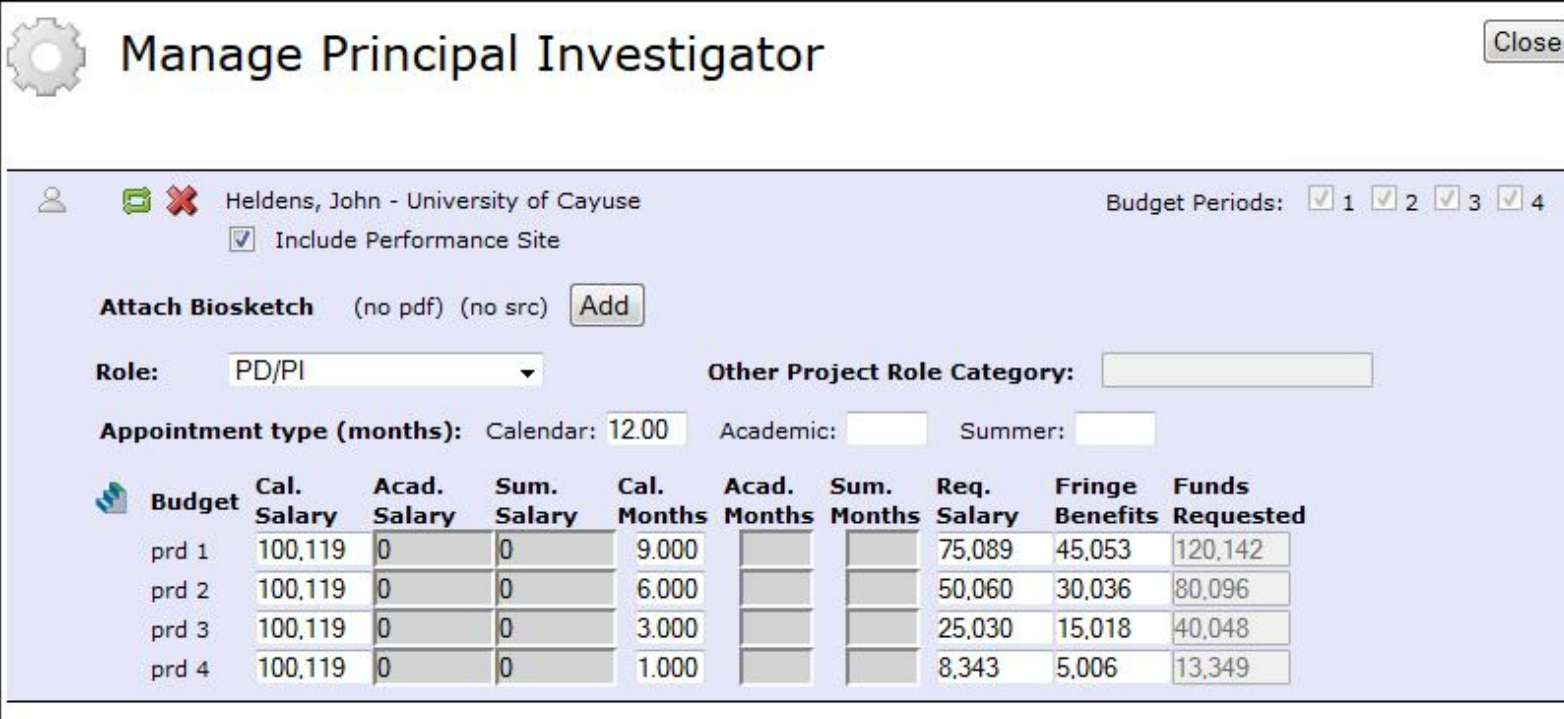
- DeMarco, Mary Kate - U of C
- Hammer, Armand - U of C
- Hammer, MC - U of C
- Harmon, Sean - U of C: Medicine
- Hawthorne, Rufus D. - U of C: Bob
- Heldens, John - U of C: Neurology
- Hoff, Andrew - U of C: Office of Sponsored Research
- Hopkins, Virginia - University of Denver: Psychiatry
- Jackson, 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 Principal Investigator [Close]


  Heldens, John - University of Cayuse Budget Periods: ☒ 1 ☒ 2 ☒ 3 ☒ 4

☒ Include Performance Site

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	100,119	0	0	9.000			75,089	45,053	120,142
prd 2	100,119	0	0	6.000			50,060	30,036	80,096
prd 3	100,119	0	0	3.000			25,030	15,018	40,048
prd 4	100,119	0	0	1.000			8,343	5,006	13,349

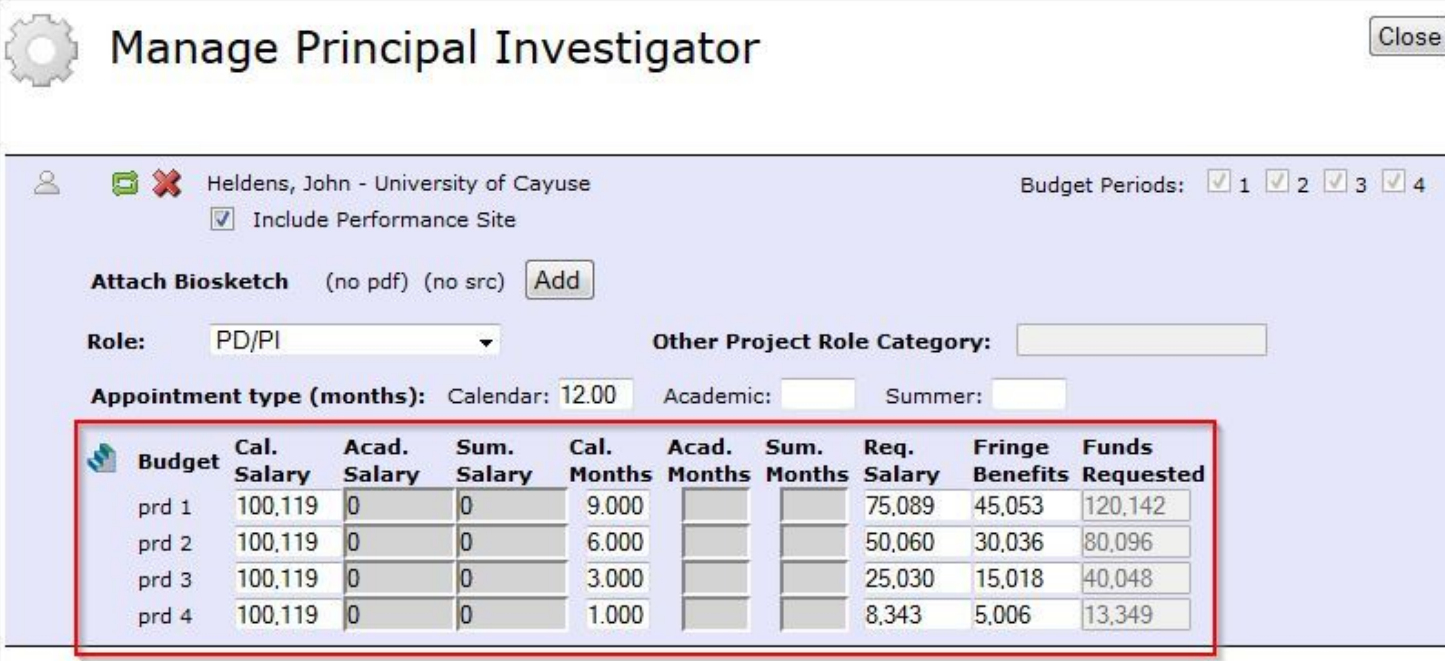
Autofill: Senior/Key Persons


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 (see Module 7 – Proposal Budgets).
- Change the Key Person's appointment type.
- Include/exclude a Key Person's active Performance Site.

Autofill: Senior/Key Persons

- If you enter base salary numbers, fringe rates, and effort months, Cayuse 424 auto-calculates **Requested Salary**, **Fringe Benefits** and **Funds Requested**.



 **Manage Principal Investigator** Close


   Heldens, John - University of Cayuse Budget Periods: ☒ 1 ☒ 2 ☒ 3 ☒ 4

☒ Include Performance Site

Attach Biosketch (no pdf) (no src) Add


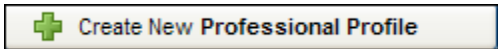
Role: PD/PI **Other Project Role Category:**

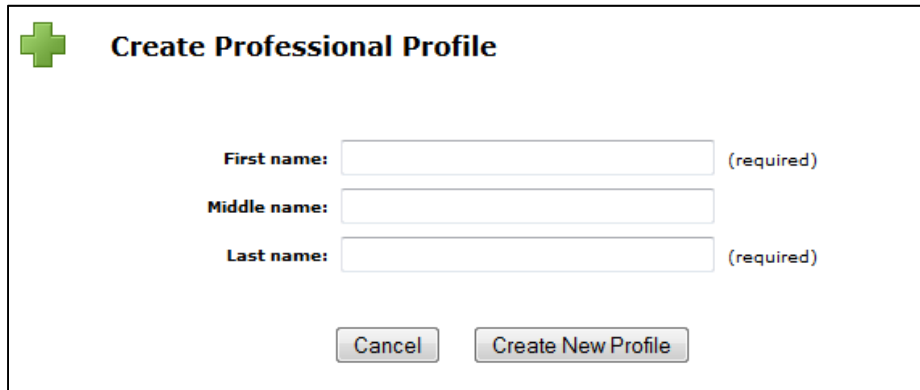
Appointment type (months): Calendar: 12.00 Academic: Summer:

 Budget	Cal. Salary	Acad. Salary	Sum. Salary	Cal. Months	Acad. Months	Sum. Months	Req. Salary	Fringe Benefits	Funds Requested
prd 1	100,119	0	0	9.000			75,089	45,053	120,142
prd 2	100,119	0	0	6.000			50,060	30,036	80,096
prd 3	100,119	0	0	3.000			25,030	15,018	40,048
prd 4	100,119	0	0	1.000			8,343	5,006	13,349

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:



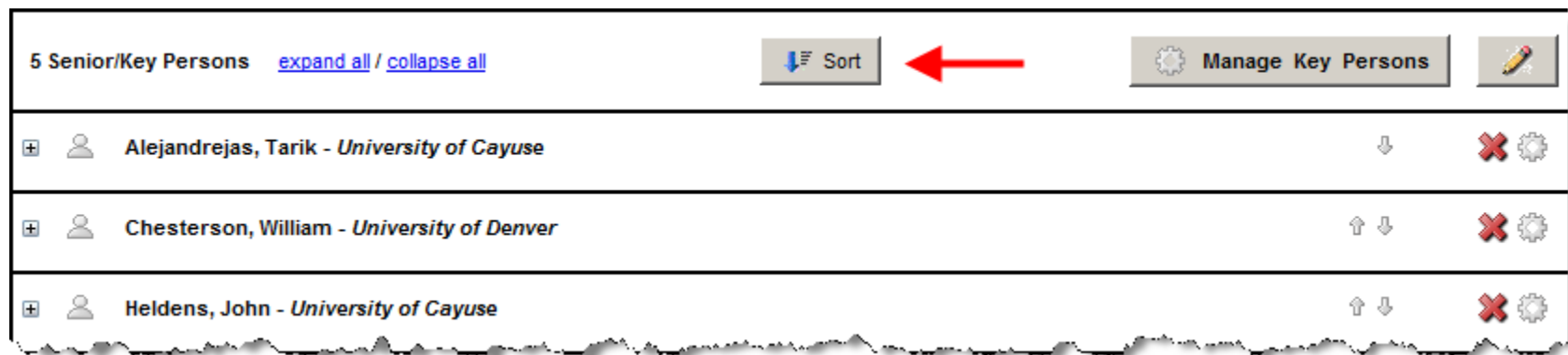
The form titled "Create Professional Profile" contains three input fields: "First name:" (required), "Middle name:", and "Last name:" (required). At the bottom, there are two buttons: "Cancel" and "Create New Profile".

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.



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:

1. The professional profile (top)
2. A file on your local computer (bottom)

The screenshot shows a software window titled "Attach biosketch". It is divided into two main sections. The top section, "Attach biosketch", contains a dropdown menu labeled "Choose a biosketch:" with "Heldens_NIH.pdf" selected. To the right of the dropdown is a checkbox labeled "Include pdf source". Below these elements are two buttons: "Attach" and "Cancel". A red box with the number "1" is placed over the "Attach" button. The bottom section, "Upload attachment", contains a text field for "Name:" with the value "KeyPersonBioSketch" and a warning "do not use: / \ : * \" < > |". Below this are two rows of controls. The first row is for the "PDF file:" with a "Browse..." button and the text "No file selected.". The second row is for the "Source of PDF: (optional)" with a "Browse..." button and the text "No file selected.". At the bottom of this section are "Upload" and "Cancel" buttons. A red box with the number "2" is placed over the "PDF file:" label.

Conclusion

In this module you have learned how to:

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