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, KC 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:
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**.
Using Autofill

5. The person’s data is autofilled into Box 19:
Autofill: Performance Sites

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

![Autofill: Performance Sites](image)

2. Select a site from a professional profile:

![Primary Performance Site Autofill](image)

- 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:
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
  – KC 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.
AutoFill: Senior/Key Persons

3. Search for or select the person you want to add.

4. Click Add Selected Key Person.
Autofill: Senior/Key Persons

5. Key person data can be edited in the Manage Key Person window:
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, KC S2S 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:
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:

![Image of RESEARCH & RELATED Senior/Key Person Profile]

1. Click **Add Attachment** next to Attach Biographical Sketch:
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)
Conclusion

In this module you have learned how to:

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