

# Module 6

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Proposal Basics




# Objectives

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- In this module you will learn how to:
  - ▣ Auto-fill data into the proposal
  - ▣ Add Performance Sites
  - ▣ Add and Sort Key Personnel
  - ▣ Attach Biosketches
  - ▣ Use the Targeted Plan and Inclusion Enrollment forms


# Auto-fill Functionality


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- ❑ Use the  icon to auto-fill fields
- ❑ Auto-filled information is extracted from either the Professional or Institutional Profile(s)
- ❑ If profile information changes during the proposal preparation process, you can auto-fill again to import the most recent information
- ❑ When you auto-fill certain sections, S2S Grants also auto-fills other logically-connected fields
- ❑ When the proposal is created and displayed for the first time:
  - ▣ Applicant Organization data has already been auto-filled
  - ▣ Principal Investigator data has already been auto-filled

# Using the Auto-fill Function

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1. Locate the section of the proposal you would like to auto-fill (e.g. Authorized Representative – Box #19 on the Face Page)
2. Click the [  ]

**19. Authorized Representative** 2 

1

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:	Please Select... <input type="text"/>		* ZIP Code:	<input type="text"/>
* Country:	Please Select... <input type="text"/>			
* Phone Number:	Fax Number:	* Email:		
<input type="text"/>	<input type="text"/>	<input type="text"/>		

# Using the Auto-fill Function

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3. Select the appropriate data to be autofilled
4. Click **Close Auto-fill Window**

Authorized Representative

eRA Role Filter: Signing Official / AOF

Close

A-Z | A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z

Only show **current ADR** on the proposal

Hansen, Martha - Office of Contract & Grant Adm

Harris-Holdrege, Barbara - Office of Contract & Grant Adm

Haskins, Mary M. - UCLA



Kawamura, Kathy - UCLA

Kukreja, Harveen - Office of Contract & Grant Adm

# Using the Auto-fill Function

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## 5. Notice data has been auto-filled into the section


**19. Authorized Representative** 5  

Prefix:	* First Name:	Middle Name:	* Last Name:	Suffix:
Ms. ▾	Martha		Hansen	▾
* Position/Title:	Contract and Grant Officer		* Organization:	Regents of the University of California, Los Ang
Department:	Office of Contract & Grant Adm		Division:	
* Street1:	UCLA Office of Contract & Grant Adm		Street2:	11000 Kinross Avenue, Suite 102
* City:	Los Angeles		County:	Los Angeles
* State/Province:	California ▾		* Zip/Postal Code:	90095-1406
* Country:	United States of America ▾			
* Phone Number:	Fax Number:	* Email:		
310-794-0236	310-943-1655	ocga2@research.ucla.edu		

# Adding Performance Sites

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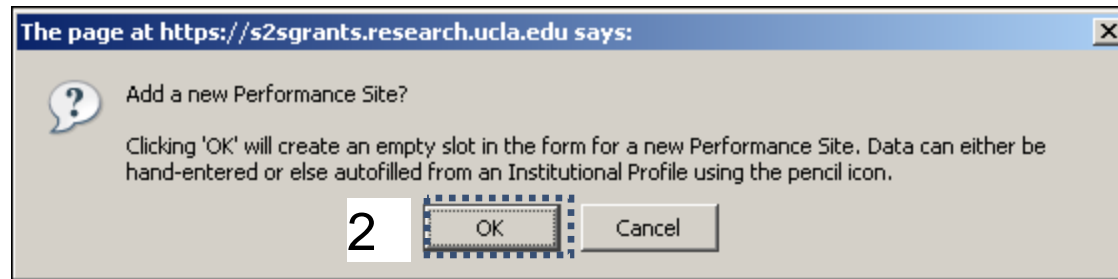
- Upon proposal creation the Project/Performance Site Primary Location will be partially auto-filled already
1. To add additional performance sites, navigate to the **Performance Site** page and click the [  ] icon

Other sites	
<input type="checkbox"/> <input type="button" value="↔"/>	1 
Organization Name:	<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..."/>
Street2:	<input type="text"/>
County:	<input type="text"/>
Zip/Postal Code:	<input type="text"/>

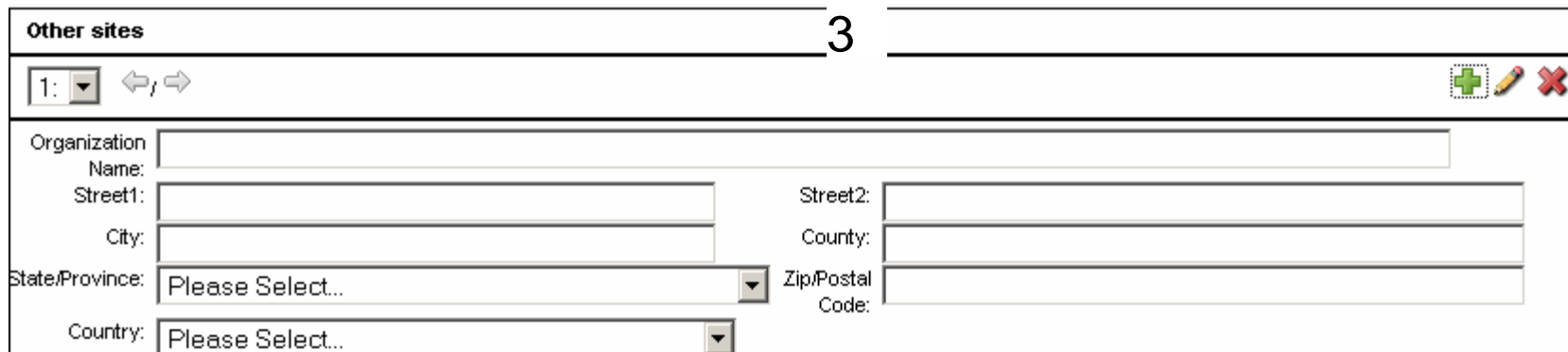
# Adding Performance Sites

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2. Click **OK** on the “Add a new Performance Site?” prompt



3. Notice a blank Performance Site location has been created

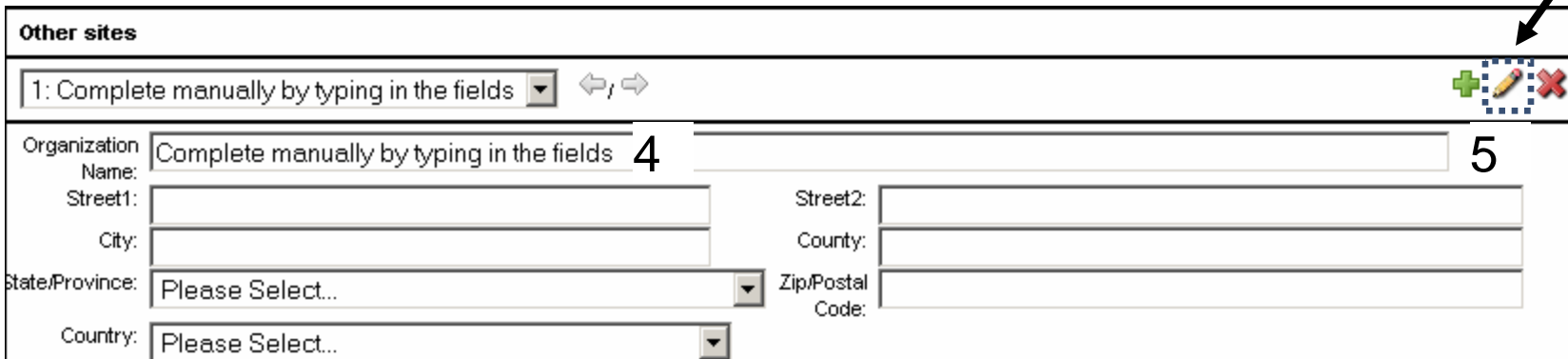




# Adding Performance Sites

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4. If adding a new site, complete form manually.
5. If adding a site with a pre-existing Institutional Profile, click the **Auto-fill Pencil** and select Institution



The screenshot shows a web form titled "Other sites". At the top right of the form, there is a toolbar with three icons: a green plus sign, a pencil icon, and a red X icon. A black arrow points to the pencil icon. Below the toolbar, there is a dropdown menu with the text "1: Complete manually by typing in the fields" and two arrows. The main form area contains several input fields:

- Organization Name: A text input field containing "Complete manually by typing in the fields" with a large number "4" to its right.
- Street1: A text input field.
- Street2: A text input field.
- City: A text input field.
- County: A text input field.
- State/Province: A dropdown menu with "Please Select..." selected.
- Zip/Postal Code: A text input field.
- Country: A dropdown menu with "Please Select..." selected.

A large number "5" is positioned to the right of the Organization Name field.

# Senior/Key Persons Page


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- ❑ 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
- 📖 View *Business Processes Document* in the Resources tab of your training handbook or the S2S Grants project website for more information on Professional Profiles for Non-UCLA Key Personnel

# Adding Senior/Key Persons

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1. Navigate to the **SF424 RR Key Person** page
2. Click **Add/Edit KP**

PROFILE - Senior/Key Person				
0 Senior/Key Persons		2		<a href="#">Add/Edit KP</a> 
Senior/Key Persons # <input type="text"/>				
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"/>		Department:	<input type="text"/>
Organization Name:	<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	Fax Number	* E-Mail		
<input type="text"/>	<input type="text"/>	<input type="text"/>		

# Adding Senior/Key Persons

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- ❑ Scroll down the Key Persons window and select the person you wish to add
- ❑ The Auto-fill Window displays all information currently stored for that individual

Hilgard, Avery - UCLA budget periods:  1  2  3  
[Biosketch](#) [Role](#) [Budget \(toggle all\)](#)

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	N/A	<input type="text" value="0"/>	<input type="text" value="0"/>	N/A	<input type="text"/>	<input type="text"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text"/>
prd 2	N/A	<input type="text" value="0"/>	<input type="text" value="0"/>	N/A	<input type="text"/>	<input type="text"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text"/>
prd 3	N/A	<input type="text" value="0"/>	<input type="text" value="0"/>	N/A	<input type="text"/>	<input type="text"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text"/>

# Adding Senior/Key Persons

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- In the Key Persons auto-fill window you can:
  1. Edit Role
    - ▣ NOTE: When adding Other Significant Contributor to NIH proposals, enter “OSC” in the Other Project Role Category. Entering anything other than OSC will generate an error.
  2. 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
  3. Attach biosketch
  4. Edit appointment type and salary
  5. Escalate salary
  6. Enter level of effort
- See screen shot on next slide

# Adding Senior/Key Persons

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Hilgard, Avery - UCLA  
 ▼ Biosketch ▼ Role ▼ Budget (toggle all) budget periods:  1  2  3

Attach Biosketch (no pdf) (no src)  3

Role:  1 Other Project Role Category:  2

Appointment type (months): Calendar:  Academic:  Summer:  4

5



Budget	Cal. Salary	Acad. Salary	Sum. Salary	Cal. Months	Acad. Months	Sum. Months	Req. Salary	Fringe Benefits	Funds Requested
prd 1	N/A	134,200	44,733	N/A	0.00	0.75	11,183	1,420	12,603
prd 2	N/A	135,542	45,180	N/A	0.00	0.75	11,295	1,434	12,729
prd 3	N/A	136,897	45,632	N/A	0.00	0.75	11,408	1,449	12,857




- Once you enter level of effort, S2S Grants 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)

# Sorting Senior/Key Persons

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- Once you have added all key persons, click the **Sort Senior/Key Persons** icon to alphabetize your list. Key Persons will be sorted first while Other Significant Contributors will appear at the bottom of the list

3 Senior/Key Persons  Add/Edit KP 

Senior/Key Persons #    

Prefix	* First Name	Middle Name	* Last Name	Suffix
<input type="text" value="Dr."/>	<input type="text" value="1: Seeman"/> <input type="text" value="2: Karlamangla"/> <input type="text" value="3: Shetty"/>	<input type="text" value="E."/>	<input type="text" value="Seeman"/>	<input type="text" value="PhD"/>

Position/Title:  Department:

Organization Name:  Division:

\* Street1:  Street2:

\* City:  County:

\* State/Province:  \* Zip/Postal Code:

\* Country:

* Phone Number	Fax Number	* E-Mail
<input type="text" value="310-825-8253"/>	<input type="text" value="310-794-2199"/>	<input type="text" value="tseeman@mednet.ucla.edu"/>

# Adding Biosketches to the Proposal

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1. Navigate to the **SF424 RR Key Persons** page
2. Click the **Add Attachment** button

<b>*Attach Biographical Sketch</b>	(no pdf) (no src)	Add Attachment	Delete Attachment
<b>Attach Current &amp; Pending Support</b>	(no pdf) (no src)	Add Attachment	Delete Attachment



# Adding Biosketches to the Proposal

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- 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

**Attach biosketch**

1

Choose a biosketch:   Include pdf source

**Upload attachment**

2

Name:  do not use: / \ : \* " < > |



PDF file:

Source of PDF:    
(optional)

# Targeted/Planned Enrollment Table

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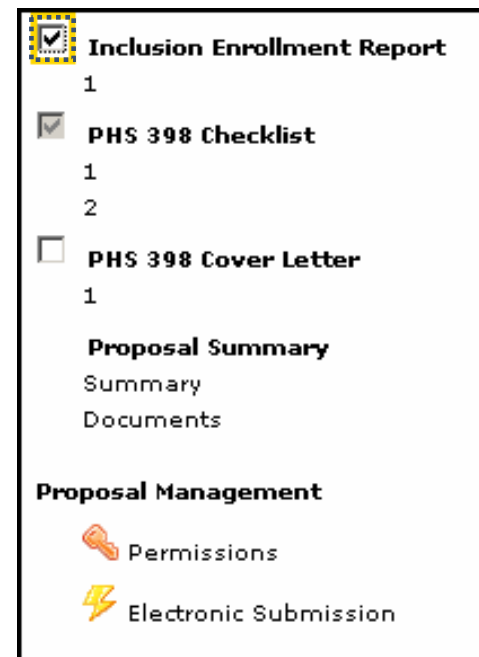
- ❑ Automatically calculates the totals
- ❑ Uploads this form in PDF format to the Research Plan section of the grant proposal
- ❑ The checkbox on the navigation bar must be checked in order to send this form to Grants.gov

<input checked="" type="checkbox"/>	<b>PHS 398 Research Plan</b>
	1
<input checked="" type="checkbox"/>	<b>Targeted/Planned Enrollment Table</b>
	1
<input type="checkbox"/>	<b>Inclusion Enrollment Report</b>
	1
<input checked="" type="checkbox"/>	<b>PHS 398 Checklist</b>
	1
	2
<input type="checkbox"/>	<b>PHS 398 Cover Letter</b>
	1
<b>Proposal Summary</b>	
	Summary
	Documents
<b>Proposal Management</b>	
	Permissions
	Electronic Submission



# Inclusion Enrollment Report

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- ❑ 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



The screenshot shows a navigation bar with the following items:

- Inclusion Enrollment Report**
  - 1
- PHS 398 Checklist**
  - 1
  - 2
- PHS 398 Cover Letter**
  - 1
- Proposal Summary**
  - Summary
  - Documents
- Proposal Management**
  -  Permissions
  -  Electronic Submission

# Overriding the Enrollment Tables

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- ❑ 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

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1. Navigate to the **Research Plan** page in S2S Grants
2. Click the **Override** button next to the appropriate Enrollment table

**Human Subjects Sections**  
Attachments 8-11 apply only when you have answered "yes" to the question "are human subjects involved" on the R&R Other Project Information Form. In this case, attachments 8-11 may be required, and you are encouraged to consult the Application guide instructions and/or the specific Funding Opportunity Announcement to determine which sections must be submitted with this application.

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

2

# Enrollment Forms

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

Upload attachment

3 Name: TargetPlannedEnrollme

DF file: Browse...

Source of PDF: (optional) Browse...

4 Upload Cancel

# Conclusion

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