



## Module 3:

# Update and Maintain a Professional Profile

---

- Welcome to the Cayuse424 **Update and Maintain a Professional Profile** module.
- In this module you will learn how to use Cayuse424 to update information, attach a biosketch, and maintain the permissions list for the Professional Profile



# Update and Maintain Professional Profile

---

- Update and Maintain a Professional Profile activities involve:
  - Updating a Professional Profile for an investigator
  - Attaching biosketch documents to the Professional Profile
  - Updating and maintaining the permissions list for the Professional Profile



# Basic Concepts

---

- ❑ Professional Profiles capture and store data about Principal Investigators, Key Personnel and Other Significant Contributors.
- ❑ Before a proposal can be created in Cayuse424, a Professional Profile for the proposal's Principal Investigator must be created
- ❑ Individuals can allow other users, through profile “permissions”, to perform certain functions with their Professional Profiles



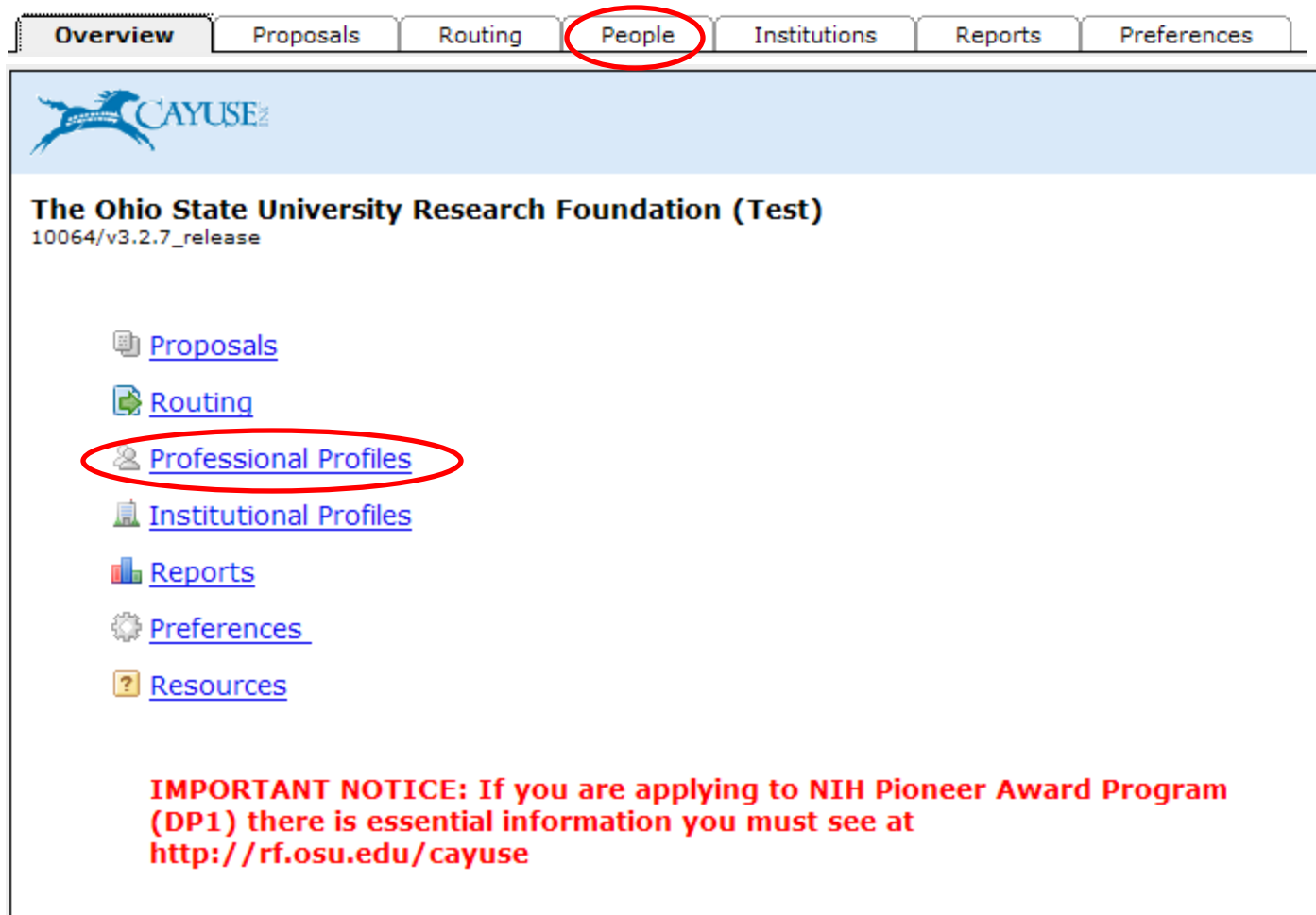
# Basic Concepts (continued)

---

- ❑ Cayuse424 provides the ability to update Professional Profiles quickly and easily.
- ❑ Information stored in the Professional Profile is autofilled into the grant proposal once that individual is named as a PI or Senior/Key Person.
- ❑ Profiles stored in Cayuse424 can be shared with others and used multiple times.

# Updating a Professional Profile

- To update your Professional Profile, login to Cayuse424 and click the **People** tab or Professional Profiles hyperlink.



The screenshot shows the Cayuse424 web application interface. The top navigation bar includes tabs for Overview, Proposals, Routing, People, Institutions, Reports, and Preferences. The 'People' tab is highlighted with a red circle. Below the navigation bar, the Cayuse logo is visible, followed by the text 'The Ohio State University Research Foundation (Test)' and '10064/v3.2.7\_release'. The main menu contains several links: Proposals, Routing, Professional Profiles (circled in red), Institutional Profiles, Reports, Preferences, and Resources. At the bottom of the page, there is an important notice in red text: 'IMPORTANT NOTICE: If you are applying to NIH Pioneer Award Program (DP1) there is essential information you must see at http://rf.osu.edu/cayuse'.



# Updating a Professional Profile


- ❑ Select investigator to retrieve profile
- ❑ Use alphabetic hyperlinks to jump to sections of the list

Overview | Proposals | Routing | **People** | Institutions | Reports | Preferences

119 Professional Profiles

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](#)

119 Professional Profiles  

- [AAANYONE, NON-OSU](#)
- [Agarwal, Gunjan](#)
- [Ahmer, Brian Mark](#)
- [Alevriadou, Barbara Rita](#)
- [Alfano, Catherine Marie](#)
- [Anderson, Clark Lawerance](#)
-  [Any, Investigator](#)
- [ASKwith, Candice C](#)
- [Ayers, Leona](#)
- [Belury, Martha](#)
- [Rishon, Georgia Ann](#)

# Updating a Professional Profile

- **Name:**
  - Update name and complete other fields
  - Enter NIH Commons username, when applicable. It must match the username in your NIH Commons profile.
- Select **Degrees** hyperlink to access the next page

Overview Proposals Routing **People** Institutions Reports Preferences

119 Professional Profiles > Any, Investigator

Professional Profile: **Any, Investigator**

**General Personal Information**

- \* Name
- Degrees**
- Demographics
- Biosketches

**1 Institutional Association**

- Emergency Medicine**
- Inst. association "nickname"
- Contact Info
- eRA Role
- Dept / Division / Title
- Salary and Fringe Worksheet
- Routing Profile

**Name**

Prefix:

First:


Middle:

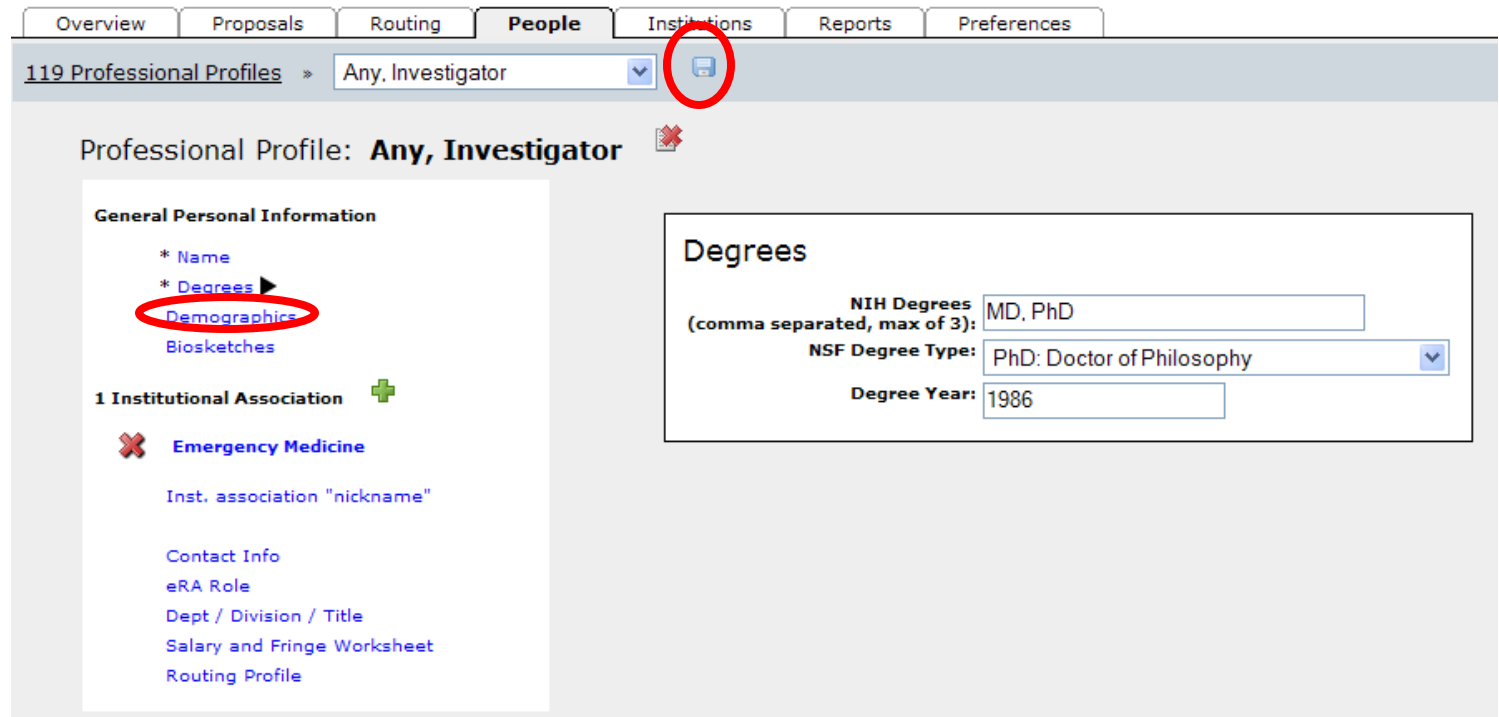
Last:

Suffix:


NIH Commons ID:


# Updating a Professional Profile

- **Degree:**
  - Enter **Degrees** (three maximum, separated by commas).
  - If NSF application, fill out NSF Degree Type and Degree Year
- Save Profile by clicking  icon.
- Click **Demographics** link to go to that page.





Overview Proposals Routing **People** Institutions Reports Preferences


119 Professional Profiles > Any, Investigator 

Professional Profile: **Any, Investigator** 

**General Personal Information**

- \* Name
- \* Degrees 
- Demographics**
- Biosketches

**1 Institutional Association** 

-  **Emergency Medicine**
- Inst. association "nickname"
- Contact Info
- eRA Role
- Dept / Division / Title
- Salary and Fringe Worksheet
- Routing Profile


**Degrees**

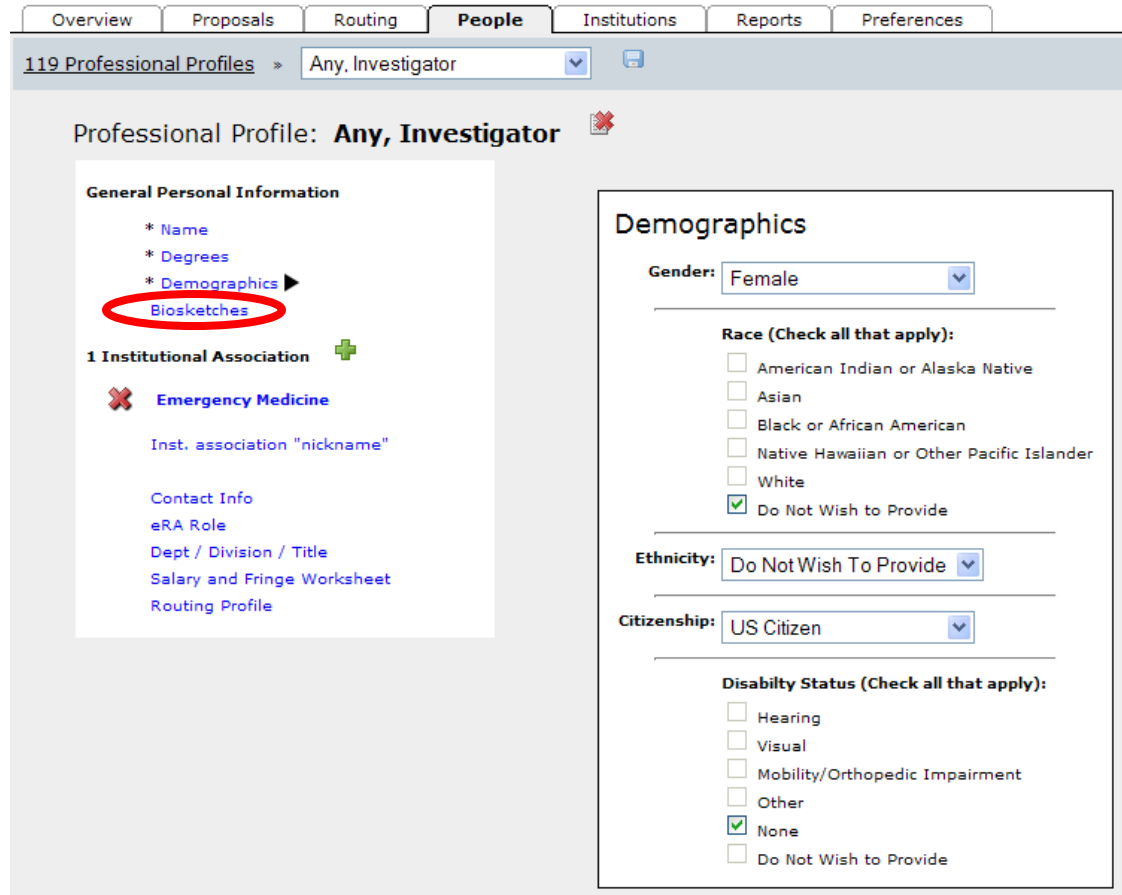
NIH Degrees (comma separated, max of 3): MD, PhD

NSF Degree Type: PhD: Doctor of Philosophy

Degree Year: 1986

# Updating a Professional Profile

- **Demographics:**
  - Enter information for various “Demographics” sections
  - Populates *R&R Personal Data* pages in proposal form sets for NSF, USDA, certain other agencies
- Save Profile by  clicking on the icon.
- Click **Biosketches** link to go to that page.



The screenshot shows a web interface for updating a professional profile. At the top, there are navigation tabs: Overview, Proposals, Routing, **People**, Institutions, Reports, and Preferences. Below the tabs, the breadcrumb path is '119 Professional Profiles > Any, Investigator'. The main heading is 'Professional Profile: Any, Investigator'. The profile is divided into two main sections: 'General Personal Information' and 'Demographics'.

**General Personal Information**

- \* Name
- \* Degrees
- \* Demographics
- Biosketches** (circled in red)

**1 Institutional Association** +

- ~~Emergency Medicine~~
- Inst. association "nickname"

Other links: Contact Info, eRA Role, Dept / Division / Title, Salary and Fringe Worksheet, Routing Profile.

**Demographics**

Gender: Female

**Race (Check all that apply):**

- American Indian or Alaska Native
- Asian
- Black or African American
- Native Hawaiian or Other Pacific Islander
- White
- Do Not Wish to Provide

Ethnicity: Do Not Wish To Provide


Citizenship: US Citizen

**Disability Status (Check all that apply):**

- Hearing
- Visual
- Mobility/Orthopedic Impairment
- Other
- None
- Do Not Wish to Provide

# Updating a Professional Profile

## □ Biosketches:

- A Biosketch is required for all Key Personnel and Other Significant Contributors in NIH proposals.
- Biosketches can be created on your desktop using the Cayuse424 Biosketch template.
- To upload a Biosketch, select the  icon



The screenshot shows the 'People' tab of the Cayuse424 system. The breadcrumb trail is '119 Professional Profiles > Any, Investigator G.'. The main heading is 'Professional Profile: Any, Investigator G.' with a red 'X' icon. The left sidebar contains links for 'General Personal Information' (Name, Degrees, Demographics, Biosketches), '1 Institutional Association' (Emergency Medicine), and 'Contact Info' (eRA Role, Dept / Division / Title, Salary and Fringe Worksheet, Routing Profile). The main content area shows 'Biosketches' with a red circle around the green plus icon and the text: 'Currently no Biosketches are filed in Cayuse424 for "Any, Investigator G.".'

# Updating a Professional Profile

## □ Biosketches:

- Type in biosketch name.

- Click **Next**.

- Click **Browse** to locate **PDF** version of Biosketch you previously created.
- Click **Next**, repeat for source file.



Professional Profile: **Any, Investigator G.**

**General Personal Information**

- Name
- Degrees
- Demographics
- Biosketches ▶

Enter a name for the new biographical sketch.



Enter the name of the PDF file to upload.

# Updating a Professional Profile

- A PDF and source version of the Biosketch are now stored on the server for use in proposals and later edits.
- Multiple Biosketches can be created and stored in each profile.
- Once Biosketches are stored they can be easily attached to the proposal on the Senior/Key Persons page.

The screenshot shows a web application interface for managing professional profiles. At the top, there are navigation tabs: Overview, Proposals, Routing, People, Institutions, Reports, and Preferences. Below the tabs, there is a search bar with the text '119 Professional Profiles' and a dropdown menu showing 'Any, Investigator G.'. The main content area is titled 'Professional Profile: Any, Investigator G.' and contains several sections:

- General Personal Information**: Includes links for Name, Degrees, Demographics, and Biosketches (with a right-pointing arrow).
- 1 Institutional Association**: Includes a green plus sign icon.
- Emergency Medicine**: Includes a red X icon and the text 'Inst. association "nickname"'. Below this are links for Contact Info, eRA Role, Dept / Division / Title, Salary and Fringe Worksheet, and Routing Profile.

On the right side of the profile page, there is a section titled 'Biosketches' with a green plus sign icon. Below this title is a table with the following data:


Name	pdf	src	Delete
AGI_v1	yes ↑	yes ↑	✖

The table is circled in red in the image.

# Updating a Professional Profile

## □ Managing Biosketch information in a Professional Profile

- A new pdf and/or source document can be uploaded to replace the current version

□ Select the  icon next to the file type:



□ Upload file as before:

Enter the name of the PDF file to upload	<input type="text"/>	<input type="button" value="Browse..."/>
<input type="button" value="Done"/>	<input type="button" value="Cancel"/>	

- To delete a Biosketch, select the  icon for that row:



# Updating a Professional Profile

- Professional Profiles for OSU investigators are linked with The Ohio State University Research Foundation's institutional profile. **Do not edit anything in the shaded area** (facing diagram).
- Once an individual is associated with an institution, basic institutional information is autofilled into proposals created with that individual as the PI.

The screenshot displays a web interface for updating a professional profile. The main heading is "General Personal Information". Below this heading are several menu items: "Name", "Degrees", "Demographics", and "Biosketches" with a right-pointing triangle. A shaded rectangular area highlights a section titled "1 Institutional Association" with a green plus icon in the top right corner. Inside this shaded area, there is a red "X" icon and the text "Emergency Medicine". Below the shaded area, there are several more menu items: "Inst. association 'nickname'", "Contact Info", "eRA Role", "Dept / Division / Title", "Salary and Fringe Worksheet", and "Routing Profile".

# Updating a Professional Profile

- ❑ Select **Institution association “nickname”** link
- ❑ Edit department name, if necessary

Overview Proposals Routing **People** Institutions Reports Preferences

119 Professional Profiles > Any, Investigator G.

Professional Profile: **Any, Investigator G.**

**General Personal Information**

- Name
- Degrees
- Demographics
- Biosketches

**1 Institutional Association**

- Emergency Medicine**

[Inst. association "nickname"](#)

Contact Info

eRA Role

Dept / Division / Title

Salary and Fringe Worksheet

Routing Profile

"Emergency Medicine"

Inst. association "nickname"

Association nickname: Emergency Medicine

# Updating a Professional Profile

- Select **Contact Info** link:
  - Contact Info for the affiliated institution is displayed.
  - You may edit autofilled information, if required, and complete remaining contact fields.

The screenshot shows a web application interface for managing professional profiles. At the top, there are navigation tabs: Overview, Proposals, Routing, **People**, Institutions, Reports, and Preferences. Below the tabs, there is a search bar with the text "119 Professional Profiles" and a dropdown menu showing "Any, Investigator G.". The main content area is titled "Professional Profile: **Any, Investigator G.**". On the left, there is a sidebar with sections: "General Personal Information" (with links for Name, Degrees, Demographics, Biosketches), "1 Institutional Association" (with a green plus icon), and "Emergency Medicine" (with a red X icon). Below "Emergency Medicine", there are links for "Inst. association 'nickname'", "\* Contact Info" (with a right-pointing triangle), "eRA Role", "Dept / Division / Title", "Salary and Fringe Worksheet", and "Routing Profile". On the right, there is a large form titled "Contact Info" for "Emergency Medicine". The form contains the following fields: Address 1 (146 Means Hall), Address 2 (1654 Upham Drive), City (Columbus), State/Province (Ohio), Zip/Postal Code (43210), County (Franklin), Country (United States of America), Phone (614-293-8305), Fax (614-293-8898), and Email (any.16@osu.edu).

# Updating a Professional Profile


- The **eRA Role** for faculty is Principal Investigator


The screenshot displays the 'People' tab of a web application. The breadcrumb trail shows '119 Professional Profiles > Any, Investigator G.'. The main heading is 'Professional Profile: Any, Investigator G.'. On the left, there is a sidebar with sections: 'General Personal Information' (with links for Name, Degrees, Demographics, Biosketches), '1 Institutional Association' (with a green plus icon), and 'Emergency Medicine' (with a red X icon). Below this are links for '\* Contact Info', '\* eRA Role' (with a right-pointing triangle), 'Dept / Division / Title', 'Salary and Fringe Worksheet', and 'Routing Profile'. On the right, a box titled '"Emergency Medicine" eRA Role' contains a list of roles: 'Role(s):' followed by four options: 'Principal Investigator' (checked), 'Assistant' (unchecked), 'Administrative Official' (unchecked), and 'Signing Official / "AOR"' (unchecked). A red oval highlights the 'Principal Investigator' option.

# Updating a Professional Profile

- **Department/Division/Title:**
  - Enter information as needed.


Overview Proposals Routing **People** Institutions Reports Preferences


119 Professional Profiles > Any, Investigator G. 

Professional Profile: **Any, Investigator G.** 

**General Personal Information**

- Name
- Degrees
- Demographics
- Biosketches

**1 Institutional Association** 

-  **Emergency Medicine**

Inst. association "nickname"

- \* Contact Info
- \* eRA Role
- \* Dept / Division / Title ▶
- Salary and Fringe Worksheet
- Routing Profile

"Emergency Medicine"

**Department / Division / Title**

**Department:**


**Division:**

**Position/title:**

# Updating a Professional Profile

## □ Routing Profile:

- **Next Reviewer:** This is the pre-award Sponsored Program Officer who generally assists the PI with proposal submissions
- **Add Delegate:** Can be used to specify a delegate when the PI is unavailable to review proposal(s). Delegates have all review powers of PI.
  - Multiple delegates can be added. Any delegate can be removed.

Professional Profile: **Any, Investigator G.** 

### General Personal Information

[Name](#)  
[Degrees](#)  
[Demographics](#)  
[Biosketches](#)

### 1 Institutional Association

 **Emergency Medicine**

[Inst. association "nickname"](#)

[Contact Info](#)

[eRA Role](#)

[Dept / Division / Title](#)


[Salary and Fringe Worksheet](#)

\* [Routing Profile](#) ▶

"Emergency Medicine"


### Routing Profile

#### Next Reviewer

Nielsen-Link, Aimee (OSURF AOR) 

#### 0 Delegates

#### Add a delegate?


Please select.. 



[Add Delegate](#)

# Managing Permissions for a Professional Profile

- ❑ Once a Professional Profile is established, permissions must be specified
- ❑ The “owner” of a Professional Profile (the individual the profile is for) is automatically granted all permissions. **Don’t change these permissions!**
- ❑ The user group is added to all profile permissions list during profile creation. **Don’t change these permissions!**
- ❑ The profile owner can share his/her profile with other users by granting appropriate permissions to selected users
  - Permissions can be changed or removed.

Permissions for Profile: **Any, Investigator G.**

 Add user/group

 Any, Investigator G. (Any.1)  
 user

List	Read	Write	Autofill	Delete	Change Permissions	Add User/Group	Remove User/Group
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

# Managing Permissions for a Professional Profile

---

**When this permission is selected:**

**That user has the ability to:**

**List**

View a profile on the Professional Profiles list.

**Read**

View the details of a Professional Profile.

**Read/Write**

Add, update or delete information on a Professional Profile.

**Autofill**

Autofill the Professional Profile information into an application.

**Delete**

Delete a Professional Profile entirely.



# Managing Permissions for a Professional Profile

---

**When this  
permission is  
selected:**

**Change  
Permissions**

**That user has the ability to:**

Change permissions for other users on the list for a Professional Profile.

**Add User/Group**

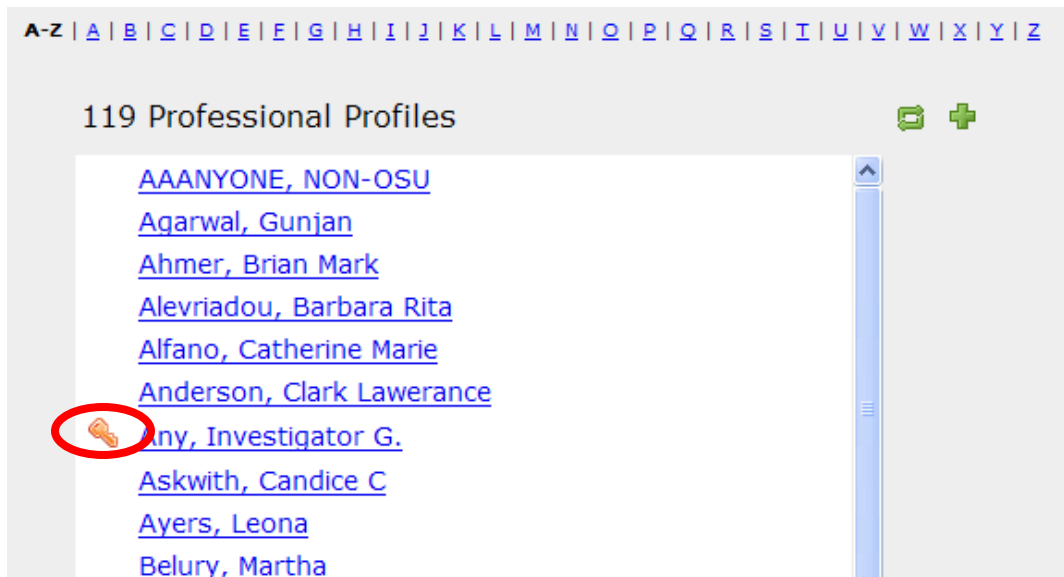
Add other users to the permissions list for the Professional Profile.

**Remove/User  
Group**

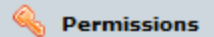
Remove a user or group from the permissions list for the Professional Profile.

# Managing Permissions for a Professional Profile

- Go to the Professional Profiles list
  - Click the  icon to manage that profile's permissions.



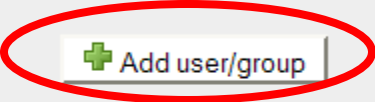
- The permission list can also be accessed by selecting the  icon in the top right corner of the profile itself.





# Managing Permissions for a Professional Profile

- To grant permission(s) to other Cayuse424 users click **Add user/group**

Permissions for Profile: **Any, Investigator G.**

  Add user/group

		List	Read	Write	Autofill	Delete	Change Permissions	Add User/Group	Remove User/Group
	Any, Investigator G. (Any.1)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	user	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

# Managing Permissions for a Professional Profile

- Scroll down the list and select the username to add
  - Note that the list has two sections
  - Individuals who do not have a profile in the system are listed in the first section

https://cayuse1.rf.ohio-state.edu:8443 - Mozilla Firefox

### Add Security Principal

To provide **Users** or **Groups** access to this **Professional Profile**, click on the table below. When finished you may [close](#) this window.

Type	Group or Username	Profile Name
U	cayuseadmin	
G	admin	
G	aor	
U	osudadmin	
U	conrad.68	
U	austin.146	
U	white.19	
U	pagura.1	
U	walshy.2	
U	shramo.4	
U	johnson.2015	
U	fridie.1	
U	veit.7	
U	chernov.2	
U	ryan.974@osu.edu	
U	bowling.18	
U	graham.49	
U	zheng.503	
U	costinean.2	
U	shockley-barr.1	
U	marcus.1	
U	knorr.1	
U	kanoski.2	
U	brundage.19	
U	bacher.1	
U	weinberger.12	
U	trainer.1	
U	abraham.61	Abraham, William Tober
U	agarwal.60	Agarwal, Gunjan

Done | cayuse1.rf.ohio-state.edu:8443

# Managing Permissions for a Professional Profile


- Default permissions are added that allow all users to:
  - See the Professional Profile on a list.
  - Read the contents of the profile.
  - Autofill contents from the profile into their grant proposals.
- You may deselect default permissions, and add other permissions, as desired.

Permissions for Profile: **Any, Investigator G.**


+ Add user/group




		List	Read	Write	Autofill	Delete	Change Permissions	Add User/Group	Remove User/Group
✘	Any, Investigator G. (Any.1)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
✘	user	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
✘	(shramo.4)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

# Managing Permissions for a Professional Profile

- ❑ Permissions can be changed for the users you add
- ❑ You can grant individual users specific permissions regarding the Professional Profile
- ❑ Select the  icon to delete a user from the permission list (don't delete the "owner" or "user" group though!)
- ❑ You do not need to add your Sponsored Program Officer to the list; SPOs (AORs) already have access to the profile through institutional settings

Permissions for Profile: **Any, Investigator G.**

 Add user/group

	List	Read	Write	Autofill	Delete	Change Permissions	Add User/Group	Remove User/Group
 Any, Investigator G. (Any.1)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
 user	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
 (shramo.4)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>