



Electronic Proposal Development and Submission

User Reference Manual

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Getting Started with Cayuse 424

Browser Support for the Research Suite

The Research Suite can be accessed on various browsers on either Windows or Macintosh systems.

Windows

- Recent versions of Mozilla Firefox, Google Chrome, or Microsoft Internet Explorer 11.
- Provisional support for Microsoft Edge.

Macintosh

- Provisional support for recent versions of Google Chrome and Apple Safari.

Note: Cayuse discontinued support for Internet Explorer 10 and older on June 30, 2016.

All of the Research Suite modules run entirely in a web browser. Upon navigating to the Research Suite or to an individual module for the first time, your browser may present a security warning prompting you to accept a certificate. This is safe. Cayuse purchases and maintains electronic certificates that are approved for Internet commerce and are compliant with Internet security standards. Accept the certificate permanently, and you will proceed to the login screen.


In order to use the Research Suite, you will need to configure your browser as follows:

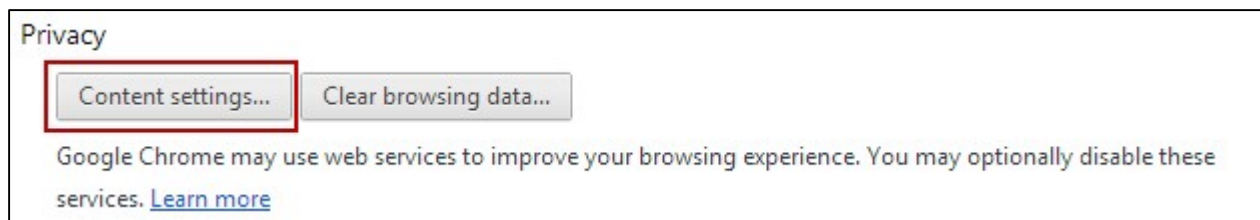
- Cookies Enabled
- Pop-ups Allowed
- JavaScript Enabled

In some browsers, cookies and pop-ups can be configured on a site-by-site basis.

Chrome Settings

Accessing Chrome's Content Settings

- At the top right of Chrome, click the click the  button and select **Settings**.
- Select **Show advanced settings** at the bottom of the window.
- Find the section labeled **Privacy**, and select **Content settings...**



Enabling Cookies

Under **Cookies**, if **Allow local data to be set** or **Keep local data only until I quit my browser** is selected, cookies are already being accepted, and no changes are needed. If **Block sites from setting any data** is selected, add an exception by clicking [Manage exceptions](#).

Cookies

- Allow local data to be set (recommended)
- Keep local data only until I quit my browser
- Block sites from setting any data
- Block third-party cookies and site data

Allowing Pop-Ups

Under the **Pop-ups** section, if **Allow all sites to show pop-ups** is selected, pop-ups are allowed and no changes are needed. However, if **Do not allow any site to show pop-ups** is selected, add an exception by clicking [Manage exceptions](#).

Pop-ups

- Allow all sites to show pop-ups
- Do not allow any site to show pop-ups (recommended)

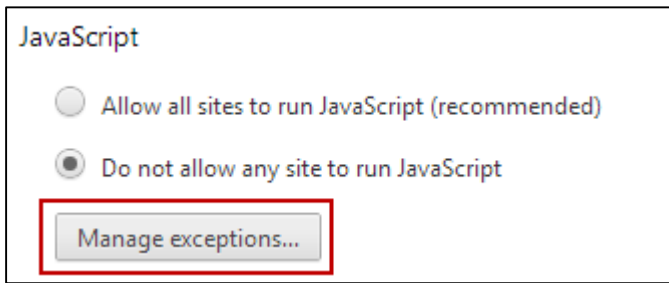
Enabling JavaScript

If you see a message like the one below, or if you're unable to perform some actions within Cayuse 424, you may need to enable JavaScript.

Username:

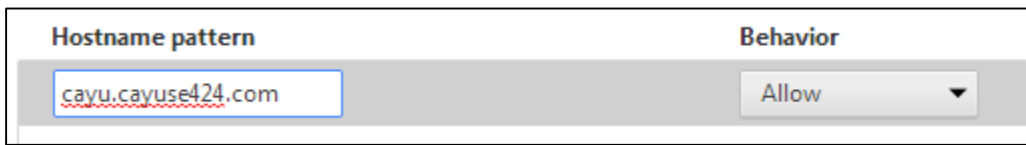
Password:

Under the **JavaScript** section, if **Allow all sites to run JavaScript** is selected, Javascript is enabled, and no changes are needed. If **Do not allow any site to run JavaScript** is selected, add an exception by clicking [Manage exceptions](#).



Adding Exceptions for Security Rules

In the window that appears, enter your institution's Cayuse 424 URL as it appears in your browser. For example, in the image below you can see how University of Cayuse (cayu) would be entered. Under **Behavior**, make sure **Allow** is selected. Then click Doneto add the exception.



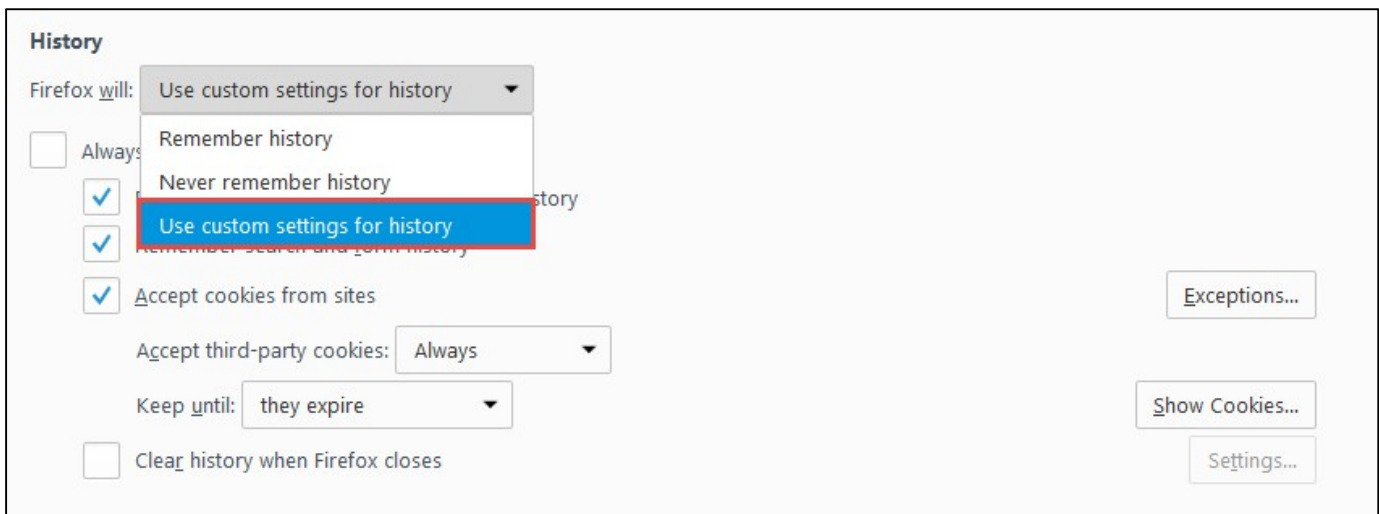
Firefox Settings

At the top left of your Firefox window, click the **Firefox** button and select **Options**. Alternatively, if you do not see a **Firefox** button, click the click the ☰ button in the upper right and select **Options**.

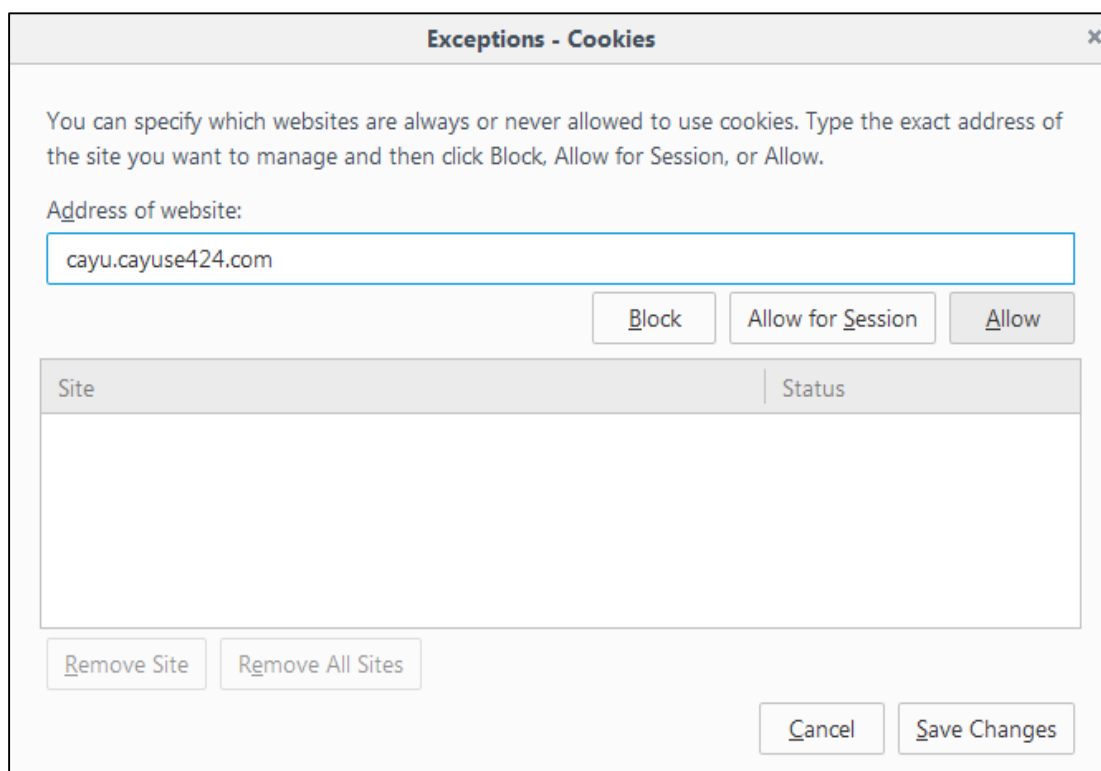
Enabling Cookies

Navigate to the **Privacy** section.

If **Remember History** is selected, cookies are already being accepted and no further changes are required. If **Never remember history** is selected, select **Remember history** or **Use custom settings for history**.



If you wish to use custom settings, you can either check the option to **Accept cookies from sites** to accept cookies for all websites, or uncheck it and use the Exceptions button to allow cookies only for Cayuse 424.



If creating an exception, enter your institution's Cayuse 424 URL as it appears in your browser, then select **Allow**.

Allowing Pop-Ups

Navigate to the **Content** section and make sure that **Block pop-up windows** is unchecked.

Alternatively, if you wish to allow pop-ups only for Cayuse 424 while blocking pop-ups on other sites, click **Exceptions** and enter your institution's Cayuse 424 URL as it appears in the address bar. Then, click **Allow**.

Allowed Sites - Pop-ups

You can specify which websites are allowed to open pop-up windows. Type the exact address of the site you want to allow and then click Allow.

Address of website:

cayu.cayuse424.com

Allow

Site	Status
------	--------

Remove Site Remove All Sites

Cancel Save Changes

Enabling JavaScript

If you see a message like the one below, or if you're unable to perform some actions within Cayuse 424, you may need to enable JavaScript.

Username:

Password:

SIGN IN ▶


This site requires that Javascript be enabled.

Note: To simplify Firefox, the ability to disable JavaScript was removed from the standard options panel. There is advanced functionality mentioned here that could potentially damage your Firefox installation if used incorrectly.

1. In the address bar, type "about:config" (with no quotes), and press Enter. (You can learn more about the advanced options panel at [Mozilla's KnowledgeBase](#).)
2. If a dialog box warning you about the risks of editing about:config pops up, click **I'll be careful, I promise**. If about:config has been accessed previously on your Firefox, you may not see this message.
3. In the search bar, search for "javascript.enabled" (with no quotes). If the value is **true**, JavaScript is already enabled in Firefox. If it is **false**, double click the result named **javascript.enabled**. JavaScript should now be enabled and the value should show "true".

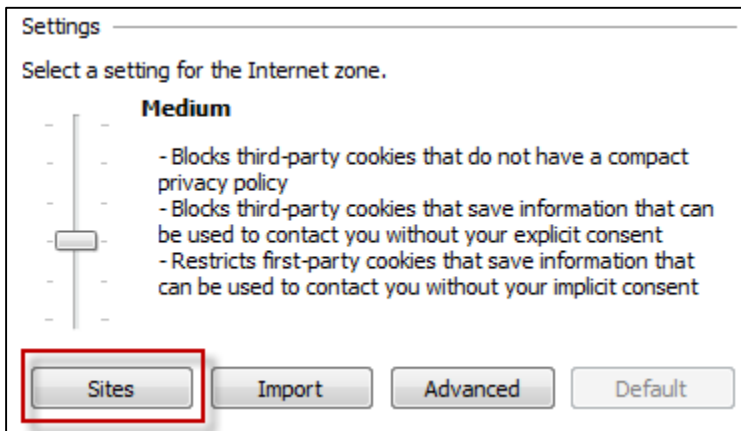
Preference Name	Status	Type	Value
javascript.enabled	default	boolean	true

Internet Explorer Settings

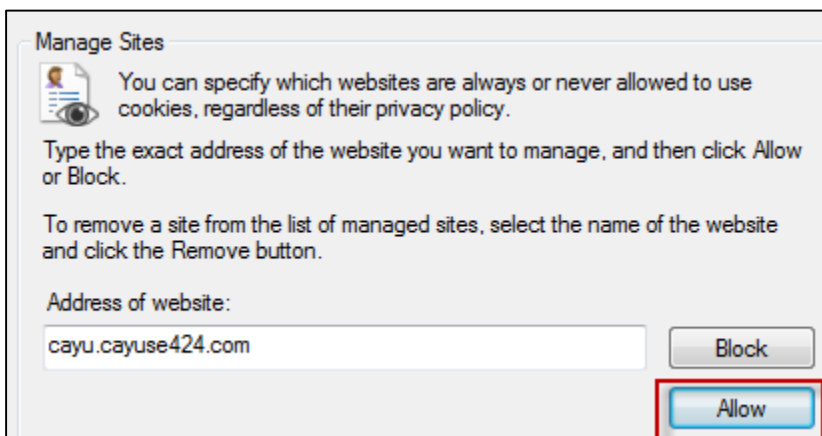
At the top right of your Internet Explorer window, click the  icon and select **Internet Options**.

Enabling Cookies

Go to the **Privacy** tab. Under **Settings**, unless the slider is at **Block all cookies**, then you don't need to change anything. Otherwise, add an exception for Cayuse 424 by clicking the **Sites** button.



Enter your institution's Cayuse 424 URL as it appears in your browser, then click **Allow**. This example shows the URL for the University of Cayuse (cayu).

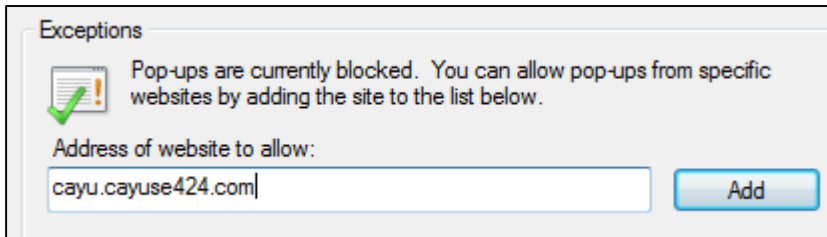


Allowing Pop-Ups

Go to the **Privacy** tab. If **Turn on Pop-up Blocker** is unchecked, then you don't need to change anything. If it is checked, add an exception for Cayuse 424 by clicking **Settings**.

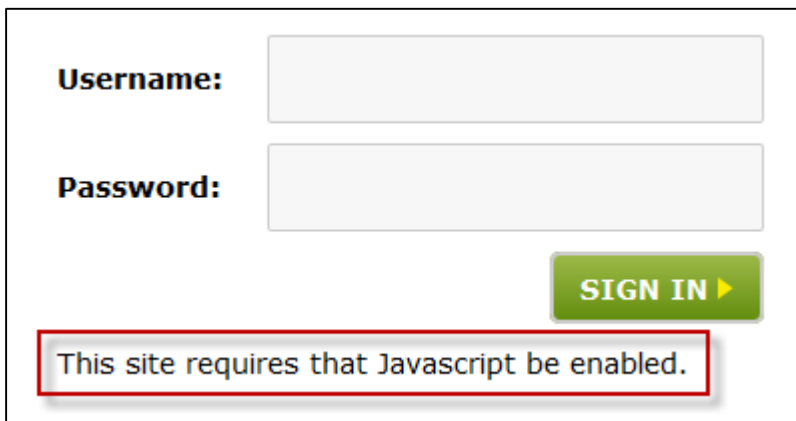


Enter your institution's Cayuse 424 URL as it appears in your browser, then click **Add**. This example shows the URL for the University of Cayuse (cayu).

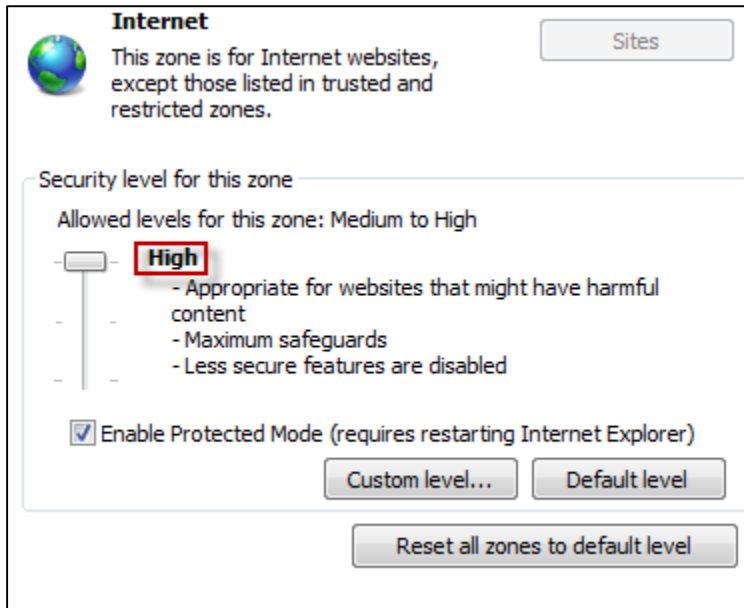


Enabling JavaScript

If you see a message like the one below, or if you're unable to perform some actions within Cayuse 424, you may need to enable JavaScript.

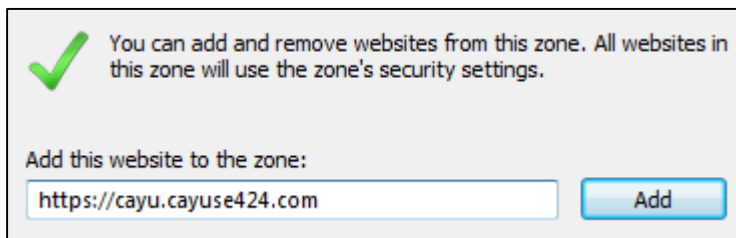


Go to the **Security** tab. If your Security Level for **Internet** is set to **High**, then you will need to add Cayuse 424 to the list of Trusted sites.

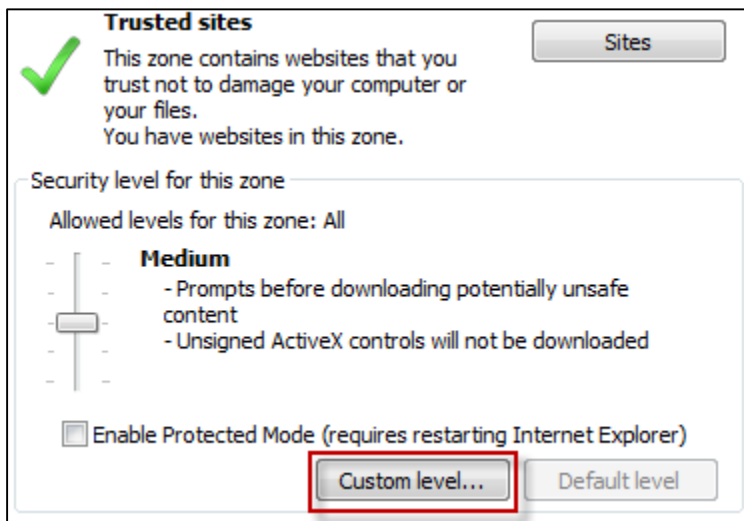


Select the green **Trusted sites** icon, then click **Sites**.

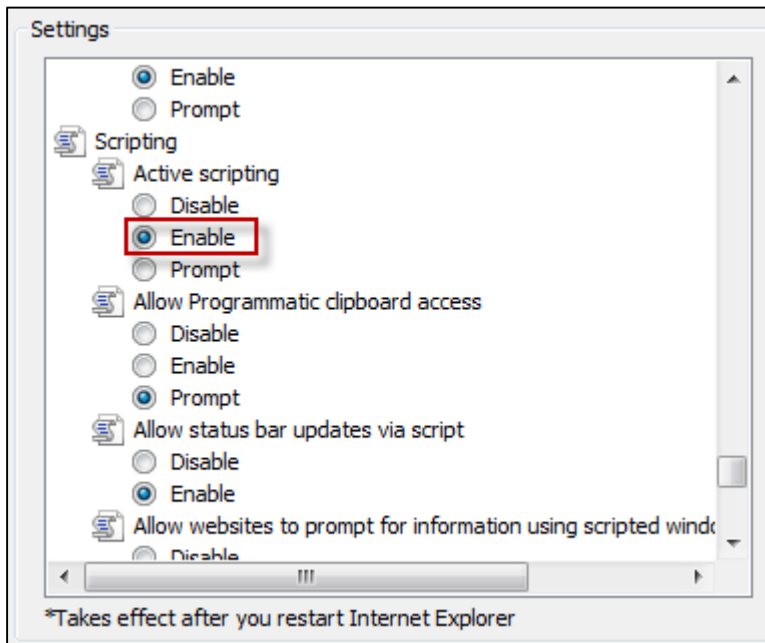
In the Sites window, enter your institution's Cayuse 424 URL as it appears in your browser, then click **Add**. This example shows the URL for the University of Cayuse (cayu).



Under **Security level for this zone** for your Trusted Sites, unless the slider is at **High**, no changes are needed. Otherwise, select **Custom level** to specifically enable scripting.



Under **Scripting**, make sure that **Active scripting** is set to **Enable**, then click **OK**.

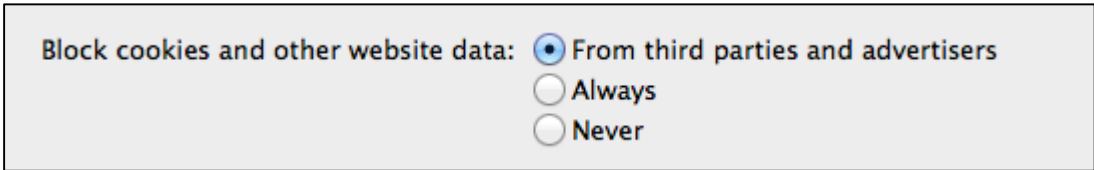


Safari Settings

In the top menu bar, click **Safari** and select **Preferences**.

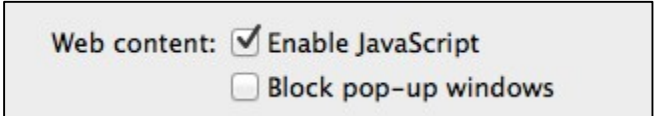
Enabling Cookies

Go to the **Privacy** tab. For **Block cookies and other website data**, if **From third parties and advertisers** or **Never** is selected, cookies are already being accepted and no changes are needed. If **Always** is selected, select one of the other options.



Allowing Pop-Ups and Enabling JavaScript

Go to the **Security** tab. For **Web content**, confirm that **Enable Javascript** is checked and **Block pop-up windows** is unchecked. These settings must be in place for Safari to display Cayuse 424 properly.




You are welcome to revert back to your previous settings when your Cayuse 424 session is complete.

If you're having any trouble accessing Cayuse 424 or the Research Suite, you may want to [clear your cookies](#).

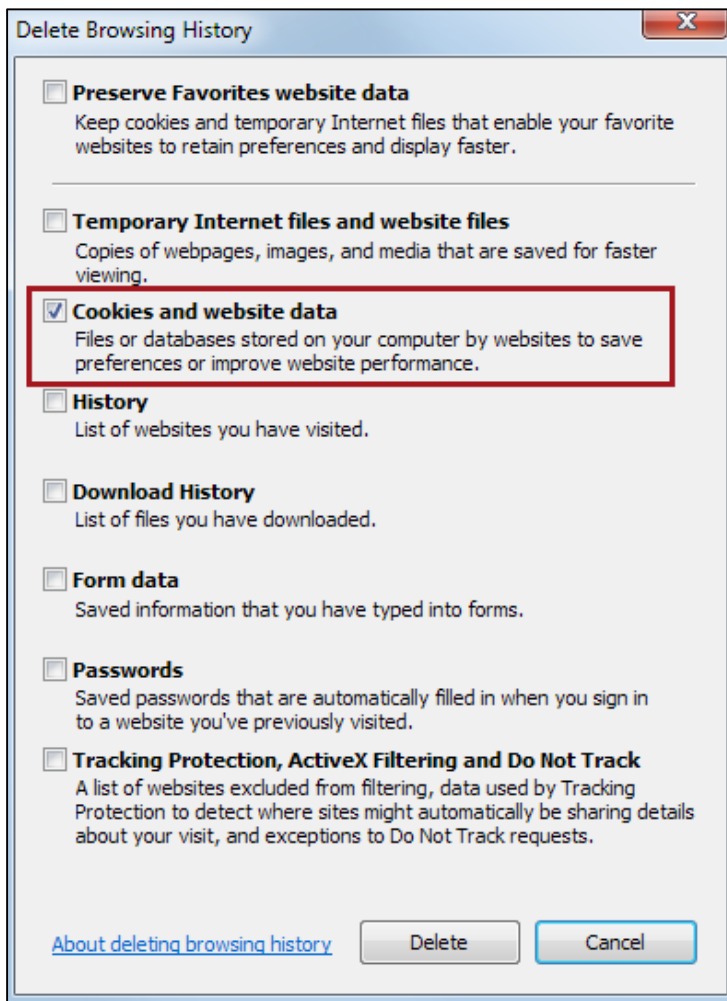
Clearing Cookies

This page contains instructions for clearing your cookies in [Internet Explorer](#), [Firefox](#), [Chrome](#), and [Safari](#).

Clearing Cookies in Internet Explorer


Click the  icon in the top right of the screen, then go to **Safety-> Delete Browsing History** . Alternatively, if you do not have a gear icon, select **Tools** at the top left of the screen, then go to **Delete Browsing History**.

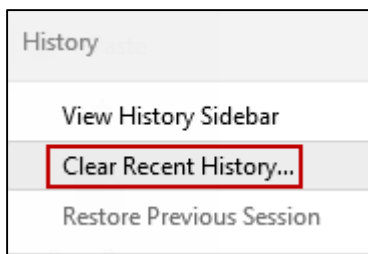
Check the box to delete **Cookies and website data**. Make sure that none of the other options are selected if you do not wish to also delete these items. Click **Delete** at the bottom of the window.



Note: This window may differ in appearance slightly depending on your version of Internet Explorer. If you have any questions or concerns, please contact Support and we would be happy to guide you through the steps.

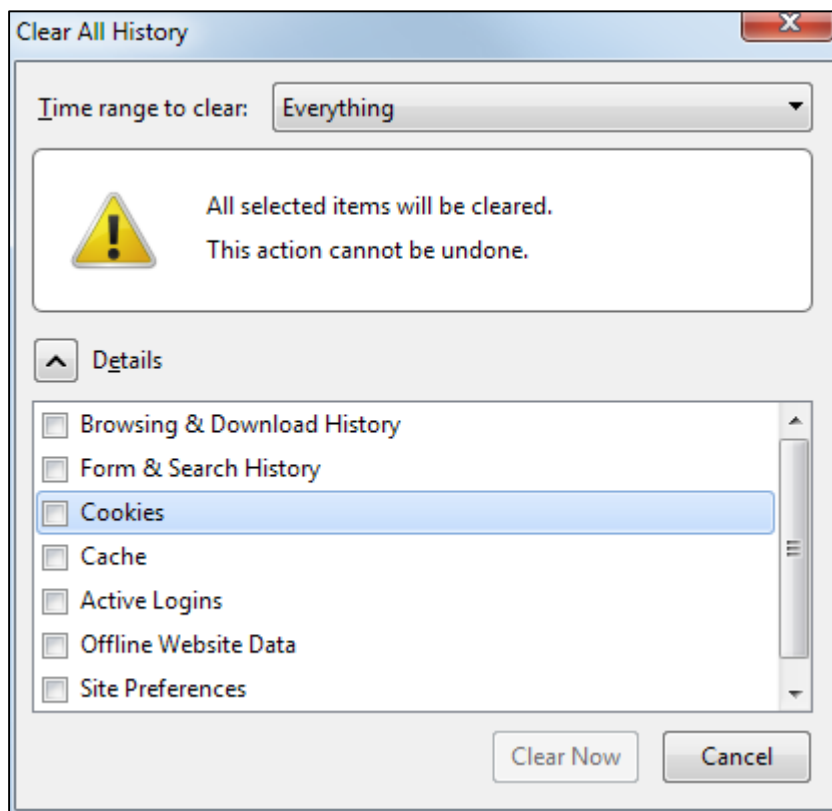
Clearing Cookies in Firefox

Click the  icon at the top right of the screen, and select **History**. Then, select **Clear Recent History**.



Alternatively, if you do not have this icon, select **History** at the top left of the screen, and then select **Clear Recent History**.


Under **Time range to clear:**, select **Everything**. Click the  icon next to **Details** to display a list of selectable items.

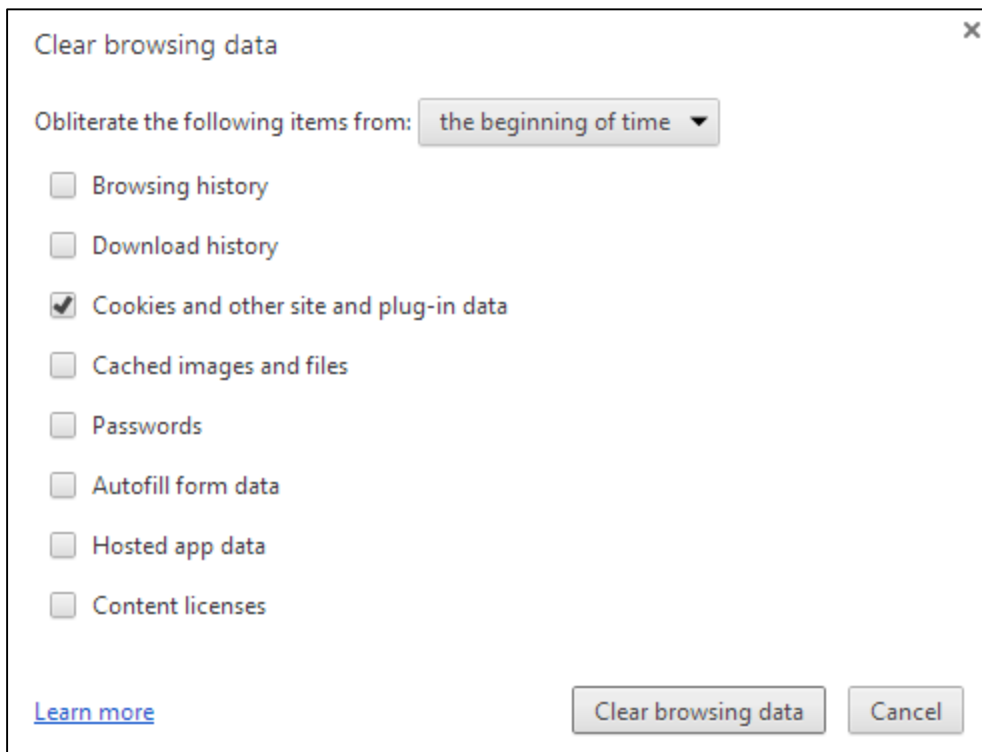


Check the box beside **Cookies**. Make sure that none of the other items are checked if you do not wish to also delete these items. Click **Clear Now** at the bottom of the window.

Note: This process may differ from what is stated above, depending on your version of Firefox. If you have any questions or concerns, please contact Support and we would be happy to guide you through the steps.

Clearing Cookies in Chrome

Click the  icon at the top right of the screen, and highlight **Tools**. Select **Clear Browsing Data** in the submenu. Under **Obliterate the following items from**, select the **beginning of time**.

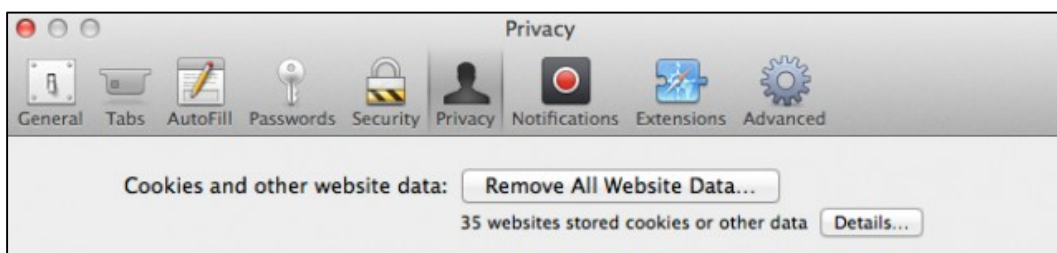


Check the box beside **Cookies and other site and plug-in data**. Make sure that none of the other items are checked if you do not wish to also delete these items. Then, click **Clear browsing data** at the bottom of the window.

Note: This process may differ from what is stated above, depending on your version of Chrome. If you have any questions or concerns, please contact Support and we would be happy to guide you through the steps.

Clearing Cookies in Safari

Click **Safari** at the top right of the screen, and select **Preferences**. Select the tab labeled **Privacy**.



Under Cookies and other website data:, click Remove All Website Data. Click Remove Now in the next window.

Note: This process may differ from what is stated above, depending on your version of Safari. If you have any questions or concerns, please contact Support and we would be happy to guide you through the steps.

Basic Navigation

After signing in to Cayuse 424, you will find yourself on the Overview tab. The Overview tab is a quick way to get to any other section of Cayuse 424.

Each tab in Cayuse 424 corresponds to a major functional area of the application where you can complete tasks related to that area.

Opportunities

The Opportunities tab contains opportunities that have previously been downloaded from Grants.gov by someone at your institution. From the Opportunities tab, you can:

- Download available opportunities
- View details of downloaded opportunities
- Create new proposals

Proposals

The Proposals tab has a list of all the proposals that you have permission to see. From the Proposals tab, you can:

- Search for a proposal you want to review or edit.
- Create or edit a proposal or subaward.
- Link subawards to proposals.
- Import a subaward.

Routing

The [Routing tab](#) lists proposals that currently or will soon require your approval. If you don't have any proposals currently being routed to you, then you won't see anything here. From the Routing tab, you can:

- Approve proposals that are being routed to you.
- Check the status of proposals that may soon require your attention.

People

The People tab lists professional profiles in your institution's instance of Cayuse 424. Professional profiles store information about people at your institution. The information in these profiles can be easily autofilled into proposals. From the People tab, you can:

- Search for people and view their professional profiles.
- Create or edit a profile for a person at your institution.
- Link a professional profile to an institutional profile.

Institutions

The [Institutions tab](#) contains the institutional profiles currently in your Cayuse 424 application. Typically, the primary profile is for your home institution, but if you frequently work with other institutions, you can create additional institutional profiles that can be autofilled into proposals. From the Institutions tab, you can:

- View institutional profile information.
- [Create or edit an institutional profile](#) if you have access to do so.

Reports

The [Reports tab](#) shows a list of reports that you can create from the data within Cayuse 424. You will only be able to

create reports on data you have access to in Cayuse 424. Most reports allow you to choose your time period and some have other options you can select. The available reports are:

- Submitted proposals (with or without direct links to the proposals).
- Proposals by Department.
- Proposed Dollars (submitted proposals with proposed dollar amount).
- Awarded Proposals by Department.
- Awards by Agency.
- Proposed Subawards.
- Awarded Subawards.

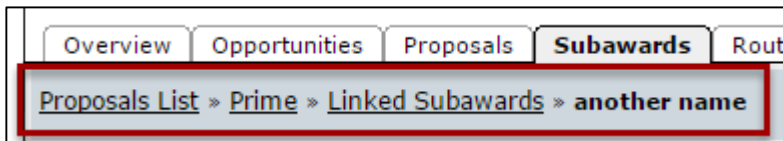
Settings

The Settings tab is where you manage your user account within Cayuse 424. From the Settings tab, you can:


- Change your password.
- Change your email address.
- Link your user account to your professional profile.

Quick Navigation

Cayuse 424 contains navigation links that make it easy and safe to move between screens or to refresh a list. One such tool is the "breadcrumb trail," which appears beneath Proposals, People and other tabs once you have opened a proposal, a Professional Profile or other record. The example below illustrates the breadcrumb trail you would see while viewing a linked subaward on a proposal.



The underlined words are links that take you back to a previous screen. When you return to a previous screen in the breadcrumb trail, Cayuse 424 automatically refreshes the page.

In addition, most pages in Cayuse 424 contain a  icon. Use this icon to update or refresh a page rather than using the browser's standard **Refresh** button.

Note: While working in Cayuse 424 and other web applications, avoid using the **Back**, **Forward** and **Refresh** buttons in your browser. On simple web sites, these buttons are appropriate for browsing. For Cayuse 424 and other complex web applications which handle important data transactions, it's best to use the controls built into the application

User Reference Manual

Below you will find links to help you navigate the User Reference Manual for the Cayuse 424 application. Using these links or the links on the sidebar will allow you to quickly navigate the various sections in this User Reference Guide.

Opportunities

The Opportunities tab lists federal funding opportunities that have been downloaded to your Cayuse 424 instance. At the top of the page, you can [download opportunities](#) that have not yet been added to Cayuse 424, or [search for opportunities](#) that have already been downloaded.

Opportunity Number	Title	Comp. ID	Comp. Title	Agency	CFDA #	Opens	Closes	Downloaded
PD-13-1517	Electronics, Photonics, and Magnetic Devices	[Research.gov]		National Science Foundation	47.041	01-07-2010	11-01-2016	02-29-2016
16-504	Industry/University Cooperative Research Centers Program	[Research.gov]		National Science Foundation	47.041	11-23-2015	07-11-2016	02-29-2016

At the top left of the page, you'll see a small green refresh button . If you leave the Opportunities tab and an opportunity is updated while you are elsewhere in Cayuse 424, you can click the refresh button to display those updates. This will happen automatically the first time you access the Opportunities tab during a session.

Opportunities can also be sorted by each field displayed on the Opportunities tab. Click once to sort by that header, and click again to reverse the sorting. For example, you can sort opportunities in alphabetical order, or sort by closing date.

Comp. ID	Comp. Title	Agency	CFDA #	Opens	Closes	Downloaded
ADOBE-FORMS-B1		National Institutes of Health	93.847	10-02-2009	10-02-2020	09-19-2012
07242010-KV-CO-NE		KV Updated	00.000		07-24-2020	05-05-2015
07242010-KV-RR-NE		KV Updated	00.000		07-24-2020	05-05-2015
07242010-KV-MN-NE		KV Updated	00.000		07-24-2020	05-05-2015
07242010-KV-SH-NE		KV Updated	00.000		07-24-2020	05-05-2015
		CALI TEST AGENCY	00.000	06-30-2014	06-30-2020	03-03-2015
		CALI TEST AGENCY	00.000	06-03-2014	06-03-2020	02-11-2015
03262009-KV-1		Agency 03262009	10.001	03-26-2009	03-26-2020	03-04-2015

Opportunity Information

Click the info icon to the left of an opportunity to view more information about it. The Opportunity Details window includes links to the schema, instructions, and Adobe form package. You will also find detailed primary agency contact information, in case you have any questions about the opportunity.



Opportunity Details

Opportunity Number: EDAFY12DISASTERRELIEF

Opportunity Title: FY 2012 Disaster Relief Opportunity

Competition Id: 5

CFDA Number: 11.307

CFDA Description: Economic Adjustment Assistance

Offering Agency: Economic Development Administration

Agency Contact: Josh Barnes

E-mail: joshua.j.barnes@eda.gov

Opening Date: 2012-03-28 00:00:00.0

Closing Date: 2015-03-27 00:00:00.0

Schema: [oppEDAFY12DISASTERRELIEF-cfda11.307-cid5.xsd](#)

Instructions: [oppEDAFY12DISASTERRELIEF-cfda11.307-cid5-instructions.pdf](#)

PDF: [oppEDAFY12DISASTERRELIEF-cfda11.307-cid5.pdf](#)

You can also see a list of forms associated with the Opportunity. This section tells you if the forms are **Supported** and/or **Mandatory**. If any forms are not supported by Cayuse 424, they will have a red X next to them. If the opportunity is not supported by Cayuse 424, the form or forms preventing proposal creation will be listed at the bottom of the window.

Forms

Supported	Mandatory	Namespace URI
*	*	http://apply.grants.gov/forms/SF424-V2.0
*	*	http://apply.grants.gov/forms/CD511-V1.1
*	*	http://apply.grants.gov/forms/SF424D-V1.1
*	*	http://apply.grants.gov/forms/SF424C-V1.0
X	*	http://apply.grants.gov/forms/ED_900-V1.0
*		http://apply.grants.gov/forms/Attachments-V1.1
*		http://apply.grants.gov/forms/SFLLL-V1.1

This opportunity *is not* supported by **Cayuse424**:



- unsupported form: http://apply.grants.gov/forms/ED_900-V1.0


Multi-Project Opportunity Information

The information that appears when working with a Multi-Project Opportunity is slightly different than what appears with other Opportunities. For more information, take a look at [Multi-Project Opportunity Information](#).

Opportunity Status

These icons may appear to the left of opportunities in Cayuse 424.

Icon	Description
	Expired: This opportunity is past its closing date. While proposals can still be created based on this opportunity, they will be rejected in most cases.
	Unsupported: Cayuse 424 does not support one or more forms on this opportunity, and cannot create a proposal based on this opportunity.

Once you've found the opportunity you are interested in, click the  shown next to the opportunity to [create a proposal](#) with this opportunity.

Downloading Opportunities

If you're browsing or [searching](#) for an opportunity and can't find it, the opportunity may not have been downloaded into your Cayuse 424 application. You need to download an opportunity before it can be viewed in Cayuse 424. To download an opportunity:

1. Click the **Download Opportunities** button at the top of the page.



2. You'll see a new window showing the Download Opportunities dialog:



3. Enter the opportunity number or CFDA Number. Be sure to enter the number exactly as it is provided, including any hyphens.
4. Click **Download Opportunities**. This will download any opportunities related to that opportunity number or CFDA number into Cayuse 424.

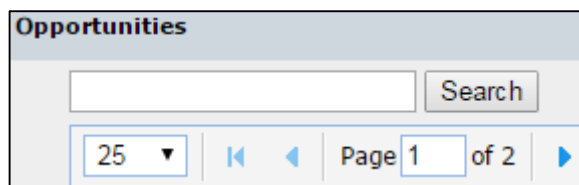
Once downloaded, opportunities will be listed in the Opportunities tab for easy access. If you're having trouble finding the opportunity you need, you can [search for it](#).

If you're having trouble downloading an opportunity, double-check the opportunity number, or try downloading it by CFDA number. You can also [search for the opportunity on Grants.gov](#) to find this information.

Searching for Opportunities

If you've downloaded an opportunity in Cayuse 424 but are having trouble finding it, you can search the list of opportunities. To search the list:

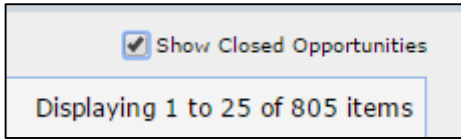
1. Type the opportunity number, CFDA number, or any number of words from the title of the opportunity into the search box at the top of the Opportunities tab.




2. Click **Search**.

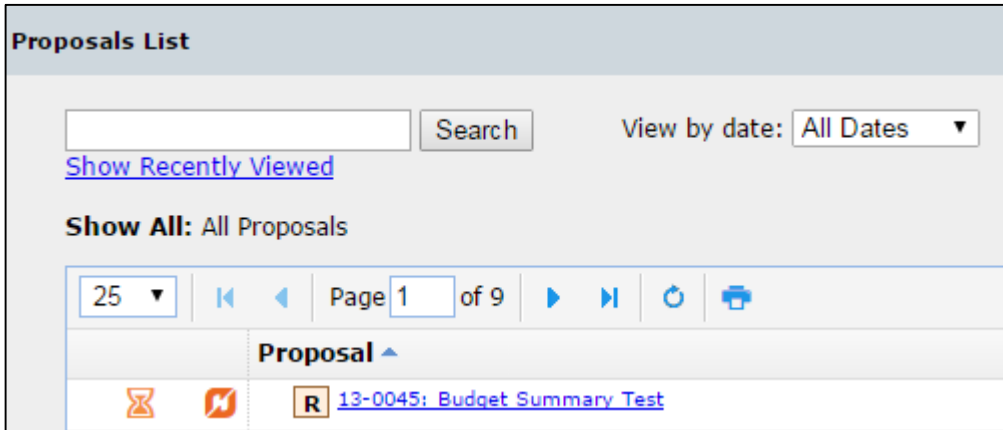
You can search by just part of the opportunity number or CFDA number as well. Remember to include any dashes that are part of the opportunity number.

If you still aren't seeing your opportunity, it may have already closed. Be sure the **Show closed opportunities** checkbox is checked and try the search again.



Proposals

The Proposals tab shows a list of proposals that have been created within Cayuse 424. This is the area of Cayuse 424 where you will spend most of your time. The Proposals tab is where you will create, develop, and review proposals. From the Proposals list, you can not only [open your proposals and subawards](#), but also [create new proposals](#), [search for existing proposals](#), and [copy or transform proposals](#). In addition to creating proposals you can [import subawards](#). You can also print the list of proposals with any sorts or filters you have used on the list by clicking the print icon  on the navigation bar.



Once you've [opened a proposal](#), you can [open and edit it](#), including adding [Key Persons](#), [Performance Sites](#), and [attachments](#) as well as [developing your budget](#). You can also [grant other people access to it](#), [submit it](#), or [check the proposal's development history](#).

Creating a New Proposal

To create a proposal directly from Proposals List, click the **Create Proposal** button  at the top of the screen. You'll see the following dialog:



The dialog box is titled "Create Proposal" and features a green plus sign icon in the top left corner. It contains three radio button options, each with a descriptive text block below it. At the bottom of the dialog are two buttons: "Create" and "Cancel".

- Grants.gov**
Proposals for federal opportunities downloaded from and submittable to Grants.gov.
- Other Proposal**
Other proposal formats not electronically submitted to Grants.gov, including other federal proposals, or opportunities from non-federal sponsors. Also includes internal opportunities.
- Subaward Proposal**
Subaward proposal for internal use or for sending to other Cayuse424 sites.

Choose the type of proposal you are creating:

- **Grants.gov** - a proposal for a federal opportunity, to be submitted via Grants.gov.
- **Other Proposal** - non-federal proposals and internal opportunities that are not submitted to Grants.gov.
- **Subaward proposal** - a subaward proposal to attach to a prime proposal in your instance of Cayuse 424. Subawards can also be exported to other institutions that have Cayuse424.

If you select **Grants.gov** and then click the **Create** button, you will be taken to a screen where you can [select the opportunity](#) you want to base your proposal on. If you select **Other**, you'll go directly to [filling in the proposal information](#).

If you want to create a Subaward proposal, the process is slightly different. Consult [Creating Subawards](#) for more information.

Selecting an Opportunity

When [creating a proposal](#) directly from the Proposals List and selecting Grants.gov as the type, you'll see the following dialog:

	Opportunity Number	Title	Comp. ID
	03262009-KV-2	03262009-KV-2	03262009-KV-1
	HS-08-603	G.g AT07 NIH FOA FORM B2 in Test for R03 AHRQ	ADOBE-FORMS-B2
	CAL-424-21	TEST SF-424 VERSION 2.1	
	CAL-ADOBE-POC	CAL Adobe Test	

If you see the opportunity you want, select the opportunity by clicking on the to the left of it in the list. If you don't see it, you can [search the opportunities](#), or sort them as you would [on the Opportunities tab](#).

Once you've found and selected your opportunity, you can continue with [filling in the proposal information](#).

Proposal Information

Once you've selected a proposal type (and, for federal proposals, [selected your opportunity](#)), you will be asked on the following screen to name the proposal, select a PI and Organization, and assign a validation type.

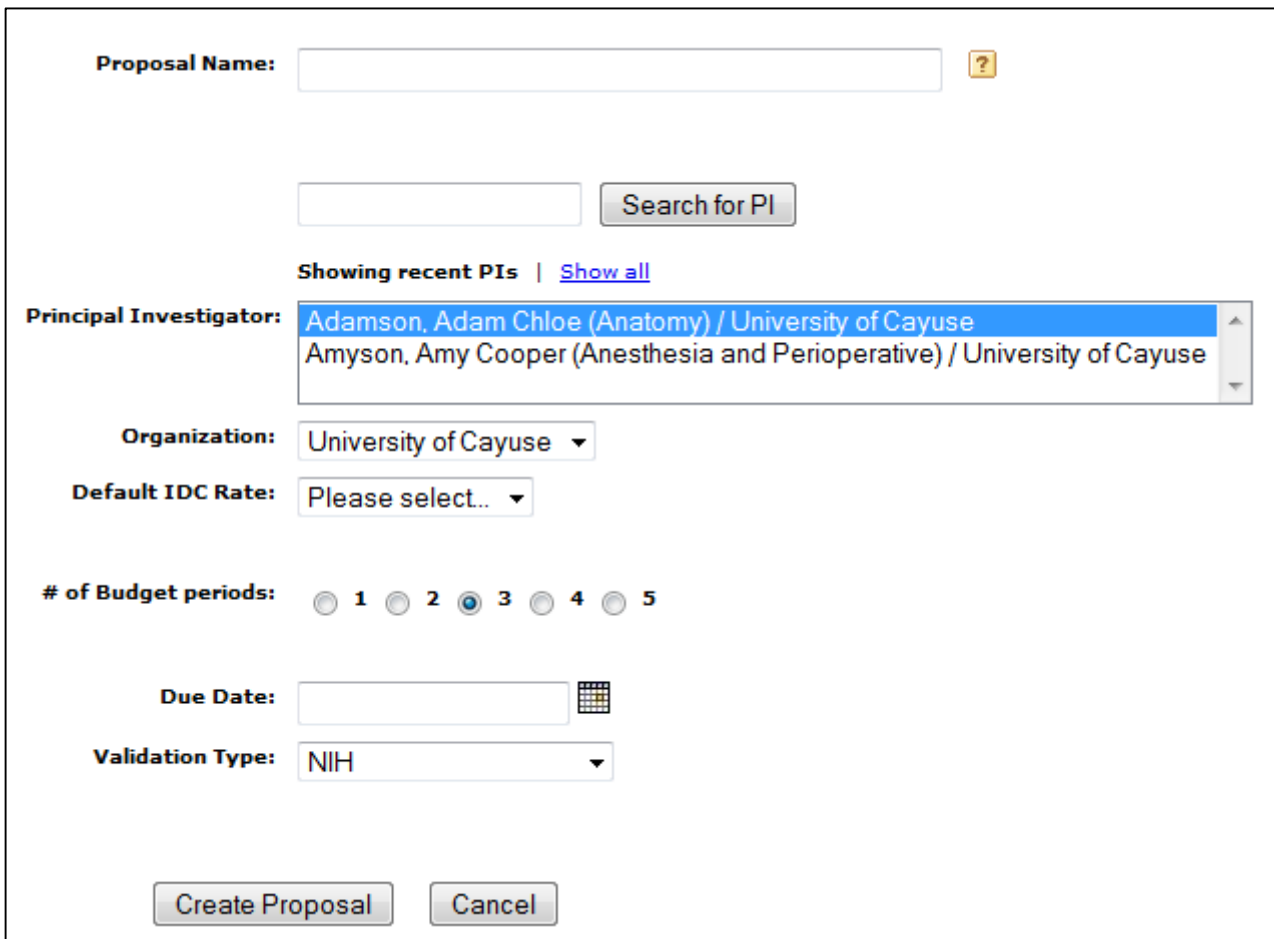
If you're creating a Federal proposal, you'll see the opportunity you selected at the top. If you have selected the wrong opportunity, click

Select a **Different Opportunity** to select another.



The screenshot shows a header section with a green plus sign icon on the left. To its right is the text "Create Grants.gov Proposal". Below this, on the left, is the text "Opportunity: PA-B2A-R01" followed by a small blue information icon. To the right of this is a button labeled "Select A Different Opportunity".

Otherwise, enter the information to create your proposal.



The screenshot shows a form for creating a proposal. It includes the following fields and controls:

- Proposal Name:** A text input field with a yellow question mark icon to its right.
- Search for PI:** A text input field with a "Search for PI" button to its right.
- Showing recent PIs | [Show all](#)**: A link to view all PIs.
- Principal Investigator:** A dropdown menu with two options: "Adamson, Adam Chloe (Anatomy) / University of Cayuse" (highlighted) and "Amyson, Amy Cooper (Anesthesia and Perioperative) / University of Cayuse".
- Organization:** A dropdown menu with "University of Cayuse" selected.
- Default IDC Rate:** A dropdown menu with "Please select..." selected.
- # of Budget periods:** Radio buttons for 1, 2, 3, 4, and 5, with 3 selected.
- Due Date:** A text input field with a calendar icon to its right.
- Validation Type:** A dropdown menu with "NIH" selected.
- Buttons:** "Create Proposal" and "Cancel" buttons at the bottom.

Name the Proposal

Your proposal name is the way the system will identify your proposal. This is different from the title of your proposal (which appears in field 11: DESCRIPTIVE TITLE OF APPLICANT'S PROJECT on the face page of the SF424RR). Your

institution may have a naming convention for the proposal name.

Select the Principal Investigator

Scroll through the PI list and select the person who will be the PI on this proposal. If the PI you wish to select is not in the list, be sure to search for the PI, or click show all. If the PI still isn't listed, their profile may not [indicate them as a PI under the eRA Roles section](#). If there are multiple PIs, select the one who will be the lead PI. Selecting a PI when creating a proposal is required.

Select the Organization

Select the primary institution for this proposal from the organization list. Choosing the organization when creating a proposal is optional, but recommended. You can also add or change the organization later while filling out the proposal.

Select the Number of Budget Periods

Select the number of Budget Periods that will be requested in the current proposal. Some grant mechanisms, like an NIH S10, only have a concept of a project period and no budget periods. In this situation, select 1 for the number of budget periods. Selecting the number of budget periods is required when creating a proposal, but this selection can easily be changed later when filling out the proposal.

Choose a Validation Type

Select an appropriate validation type for your proposal. For federal opportunities, choose the agency that sponsors the opportunity you have selected. This allows agency-specific validation rules to be applied to the proposal. If you are filling out a non-federal proposal, select "Other- Minimal".

For any federal proposal, Cayuse 424 performs validations based on the Grants.gov XML schemas that are published with the application forms as well as those specific to the agency validation type you select. The agency validation types are listed below:

Validation Type	Description
NIH	Runs all the NIH validations.
NIH - Opt Out	This is shorthand for "opting out of limited validations." If your FOA is listed on the Opt-out page at NIH you should choose this option, which uses an alternative set of some NIH validations. For an explanation see the web page at NIH . Note: As of Cayuse 424 version 7.0, NIH has discontinued support for Opt-Out validations. Alternative validation guidance for opportunities with opt-outs is now provided by a web service. For historical purposes, the NIH Opt-Out selection remains in the Validation Type drop-down. You should still choose NIH - Opt Out for Opt-Out opportunities. The instructions in your FOA supersede any errors that Cayuse 424 may show.
NIH - Minimal	Only used for RC4 applications.
CDC	Loads NIH validations for CDC proposals.
CDC - Opt Out	Loads NIH - Opt Out validations for CDC proposals.
CDC - Minimal	Loads a subset of NIH validations for CDC proposals.
AHRQ	This HHS agency uses the NIH validations.
HHS - Other	Use for HHS proposals which don't fit into the above validations.
NSF	Use for National Science Foundation proposals.

NIFA	Use for National Institute of Food and Agriculture proposals.
CDMRP	Use for Congressionally mandated research programs.
ONR	Use for Office of Naval Research proposals.
NASA	Use for NASA proposals.
Other Federal Agency	This selects only the XML validations (Grants.gov). Use this for any Federal Agency not listed above.
Other - Minimal	For other miscellaneous proposals - this validation set is rarely used.

You can also change your validation selection after you have started the proposal.





After choosing the validation type, click **Create Proposal**. The proposal will open and you'll see [the included forms and other information](#).

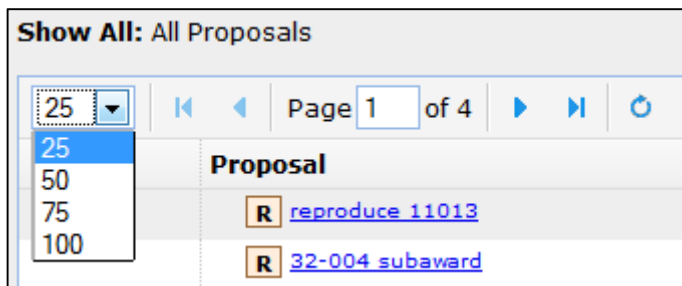
Creating a Multi-Project Proposal


The information that appears when working with a Multi-Project Proposal is slightly different than what appears with other Proposals. For more information, take a look at [Creating a Multi-Project Proposal](#).

Navigating Existing Proposals

By default, the Proposals List shows all proposals. Click the **Show Recently Viewed** link to view the 25 most recently viewed proposals for fast access. To sort the list by a particular column, click on the heading of that column. Clicking again will reverse the sort order.

The dropdown at the top left controls how many Proposals can be viewed on one page. Up to 100 Proposals can be viewed on one page. Clicking  will take you to the first page in a set. Clicking  will take you to the previous page in a set. Clicking  will take you to the next page in a set. Finally, clicking  will take you to the last page in a set. You can also navigate to any available page by typing the number into the page box and hitting **Enter**.



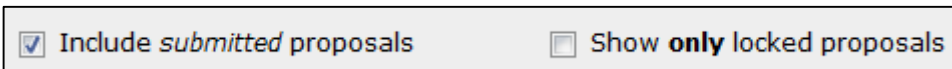
Clicking  will refresh the Proposals List. If you're looking for a recently created proposal and you are unable to find it, refreshing the Proposals List is a good place to start.

Clicking **Show All** lists all the proposals that you are able to view. When you're viewing all your proposals, as above, clicking **Show Recently Viewed** returns you to the shorter list. Checking **Make Show All the default view** means Cayuse 424 will show all of your proposals whenever you log in. This setting is user specific, so it can be changed without impacting other users.

To view older proposals, use the **Show All: View by date** dropdown. Select **Modified in the last:** to see recently modified proposals, or **Created in year:** to view all proposals by creation date.








To the right of the **View by date** dropdown, there is an **Include submitted proposals** checkbox. When this box is checked, submitted proposals will show in the Proposals List. **Show only locked proposals** will only display proposals that currently have someone editing them.




Clicking **Expand All** at the top right of the screen will show all linked subawards currently on the Proposals List. **Collapse All** will hide all the linked subawards on the page. Subawards can be expanded or collapsed on an individual basis by clicking the **+** or **-** button to the left of a Prime proposal with subawards.

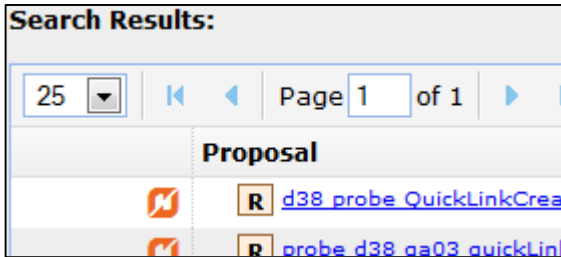
Proposal Status


Icons indicating the proposal status are shown to the left of the proposal.

Icon	Description
	<p>Submitted: The yellow lightning bolt indicates that the proposal has been submitted to Grants.gov. Hover over the icon to see the tracking number.</p>
	<p>Failed Transmission: The red lightning bolt indicates that the proposal was not successfully transmitted to Grants.gov.</p>
	<p>Marked as Submitted: The blue lightning bolt means that this non-Federal proposal has been manually marked as submitted via the Proposal Summary page of the proposal. (Does not show for Federal proposals.)</p>
	<p>Expired: The hourglass denotes that the opportunity that this proposal is using is past its deadline or has been superseded. While proposals can still be created based on this opportunity, they will be rejected in most cases.</p>
	<p>Archived Opportunity: The "red circle" means that the source opportunity for this proposal has been removed from the Grants.gov server and is no longer valid. To proceed with submitting this proposal, you will need to transform it to a valid opportunity.</p>

Paired SP Proposals

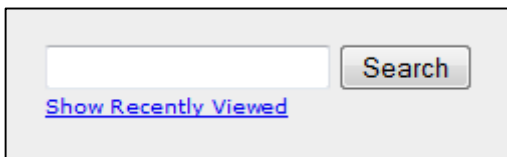
if your institution uses Cayuse SP, the  icon is also shown to the left of a proposal when that proposal is paired with an SP proposal.



Click on the  icon to open the paired Cayuse SP proposal.

Searching for Proposals

If you're not able to quickly locate the proposal you need, you can search the Proposals List using the search box in the upper left:

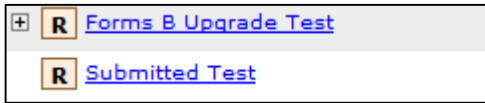


You can search for proposals by any of the columns in the list, including the proposal or project title, the PI, and even the proposal type. You can search for parts of words or names. If the proposal is associated with a federal opportunity, you can search by the opportunity number. If a proposal has been submitted, you can also search by GRANT tracking number.

If you're having trouble finding what you are looking for, try using different search terms, or use just part of the title or PI name.

Opening a Proposal

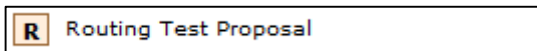
Opening a Proposal for Editing: To open a proposal you want to edit, click on the link for that proposal in the "Proposal" column of the list.



The link is only active when you have permission to edit the proposal and the proposal is not being edited by another user. When you open the proposal this way, you can review and edit the proposal.


A + or - icon beside a Proposal means that the Proposal has linked subawards. Clicking the + icon will reveal the linked subawards, and clicking the - icon will hide the linked subawards.

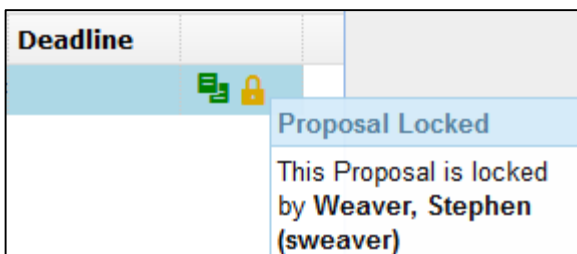
Opening a Proposal in Read-only Mode: If someone else is already working within the proposal, or if you don't have permission to edit it, the link will not be active. You'll need to open the proposal in read-only mode by clicking the **R** icon to the left of the proposal name.




You can also use the **R** icon when you want to review the proposal, but do not need to edit it. This allows someone else to edit it while you have it open. If someone else is editing it, you will not automatically see the changes they make. You must exit and reopen the proposal to see any changes.

Unlocking a Proposal: While someone is working in a proposal, it is 'locked' so that no one else can make changes. While a proposal is locked, all of its linked subawards will be locked as well. This prevents other users from making changes to the subawards while the prime is open. The reverse applies as well. When someone is editing a linked subaward, this will lock the prime, preventing changes as long as the subaward is being edited.

To see who is currently working in the proposal when it is locked, look to the far right of the Proposals List. When you hover over the  icon, you'll see the name of the person currently editing the Proposal.



Taking the Lock: If you see your own name to the right of the lock, the proposal's link will still be active, and you can "take the lock" from yourself and continue editing the proposal. This can occur when you have the proposal open in two places, or if you were unable to exit Cayuse 424 by signing out in the normal manner.


 **Take proposal lock?**

This proposal is currently locked by you - it may be open in another browser window or may not have been exited correctly.

Would you like to take the lock for this proposal in this session, discarding any unsaved changes in other windows?

Taking the lock may cause you to lose any unsaved data. If you have the proposal open in another window or tab, be sure you have saved all your entered data.

Breaking the Lock: If you have the proper permissions, you can also take the lock from another user. This is called "breaking the lock." To break the lock and take control of a proposal, enter the proposal in read-only mode. Then, click on the lock located at the top of the page.

Locked by: Weaver, Stephen (sweaver) 

If you break the lock when another user is in the proposal, they will lose any changes made since they last saved. We recommend not taking the lock until you have confirmed with the current user that they have saved all their changes.

Break the proposal lock? Take write-access?


Do you really want to take over the lock for write-access to this proposal, currently held by user "Weaver, Stephen (sweaver)"?

If "Weaver, Stephen (sweaver)" has unsaved changes in another session then taking over the lock will cause those to be lost.

Sometimes a local Admin or one of our Support representatives will ask to "take the lock" from you. Make sure you save your changes before allowing someone else to take the lock.

Copying and Transforming

With Cayuse 424, you can quickly copy an entire proposal and edit the copy as needed. If you plan to resubmit a proposal, Cayuse recommends that you make a copy of the proposal first, and keep the original as a record of the first submission. You can also transform the proposal to a different opportunity, which preserves data from the original proposal where corresponding forms exist in the new opportunity package.

Both procedures start by clicking the  icon at the right side of the proposal to launch the Copy/Transform dialog.



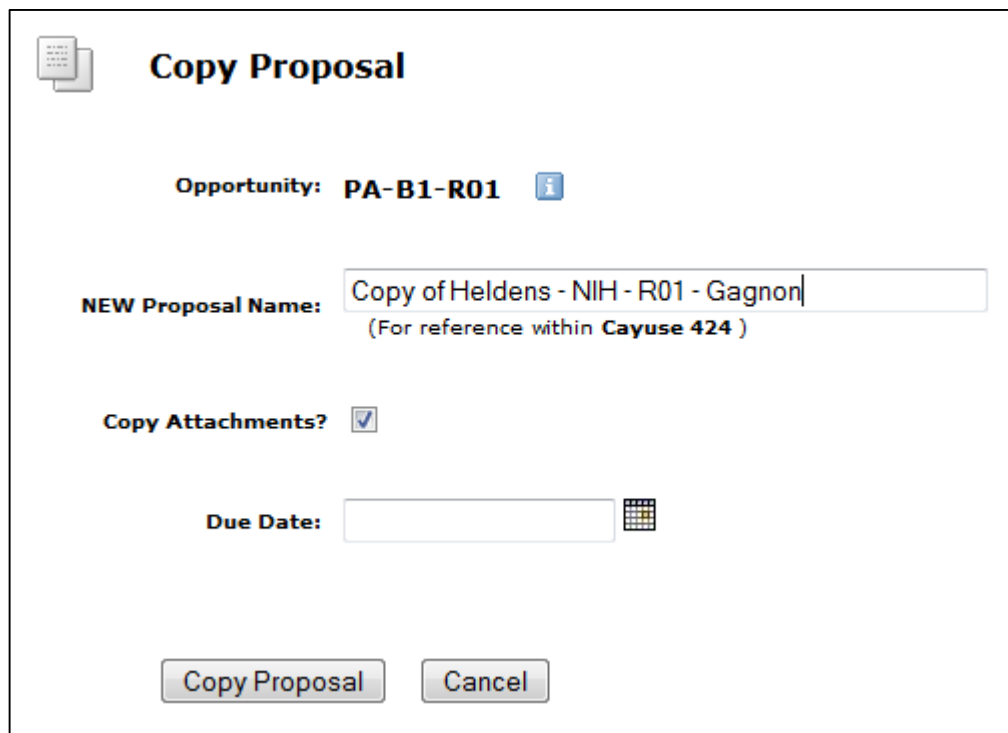
Proposal Copy/Transform

Copy the current proposal, or "transform" it to a different Opportunity?


Copying a Proposal

In the initial Copy/Transform Dialog, click **Copy Proposal**.

Edit the Proposal Name for the new proposal as desired.




Copy Proposal

Opportunity: PA-B1-R01 

NEW Proposal Name:
(For reference within Cayuse 424)

Copy Attachments?

Due Date: 


If you do not want to copy the attached documents, uncheck the **Copy Attachments** checkbox. Click **Copy Proposal**.


Your new proposal will appear in the Proposals List.

Transforming a Proposal

If you want to instead transfer the existing data to a different opportunity, or even a new version of the same opportunity, transform the proposal. Once a proposal is created against an opportunity, if the opportunity is updated, the proposal does not automatically reflect the update (since forms may have changed) and must be transformed.







When you transform a proposal, information will only be copied between forms that are the same in each opportunity. If you are replacing an expired opportunity with a new one, the forms will generally be the same, but if it is a different opportunity, some forms may be different and that information will not transfer.

1. In the initial Copy/Transform Dialog, click **Transform Proposal**.
2. Select the new opportunity from the list by clicking on the green plus icon  to the left of the opportunity. This process is similar to [selecting an opportunity](#).

 **Transform Proposal...**

Proposal To Transform: "Transform of Support documentation Proposal"
Current Opportunity: PA-40-203

Select Opportunity

	Opportunity Number	Title	Comp. ID	Agency
 	EY-06-631	F31 RFA IC is null for FOA entered, ReUse for Renewal, get to awarded state	ADOBE-FORMS-B1	National Institutes of Health
 	PAS-06-631	F31 IC is null for FOA entered, ReUse for Renewal, get to awarded state	ADOBE-FORMS-B1	National Institutes of Health
 	OD12-041	SMALL BUSINESS ALZHEIMER'S DISEASE RESEARCH	ADOBE-B2	National Institutes of Health

3. Edit the Proposal Name for the new proposal as desired.

Transform Proposal

Opportunity: **PA-C-K12** ⓘ
Select A Different Opportunity

NEW Proposal Name: Transform of Heldens - NIH - R01 - Gagnon
(For reference within Cayuse 424)

Copy Attachments?

Due Date: ⓘ

Validation Type: NIH ▼

Transform Proposal Cancel

4. If you do not want to copy the attached documents, uncheck the Copy Attachments checkbox.
5. Select the Validation Type if a different type is required.
6. Click **Transform Proposal**. Your new proposal will appear in the Proposals List.

Copy/Transform of Multi-Project Proposals

Multi-Project Proposals must be Copied/Transformed one component at a time. Selecting Copy/Transform on the Overall Component **will not** Copy/Transform the entire Proposal, just the Overall Component.

Additionally, Components and R01s can be transformed into Components for other Multi-Project Proposals. For more information on this process, please take a look at [Transforming Existing Components](#).

Deleting a Proposal

In Cayuse 424, the creator of a proposal is automatically granted the ability to delete it. Anyone who has been granted the delete permission for a proposal (see [Permissions](#)) can also delete that proposal. If the permissions on a proposal have been changed, the creator may not be able to delete it. To delete a proposal:

1. Open the Proposals List.
2. Look for the proposal in the list. If you don't see it, you can [search for it](#) or select **Show Recently Viewed** under the search box.
3. Click the **✗** icon to the far right of the proposal. If you don't see this icon, you can't delete the proposal.
4. You'll see a message asking you to confirm that you really want to delete the proposal. If you are sure, click **Delete Proposal**. Otherwise, click **Cancel**.

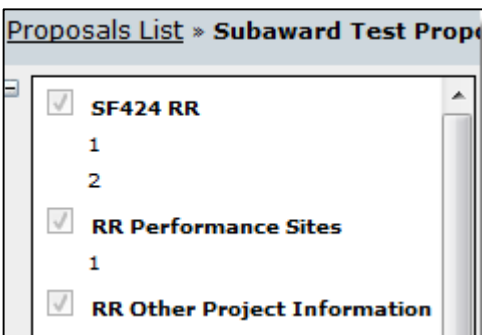
Even if you have permissions to delete a proposal, there are three reasons you may not see the delete icon:

- n The proposal is currently being edited. Proposals currently being edited cannot be deleted.
- n The proposal has linked subawards, or the subaward proposal is linked to a prime. You must [unlink](#) the subaward before you can delete the proposal or the subaward. You can delete a subaward during the unlinking process.
- n The proposal is paired with a Cayuse SP proposal. You will need to [un-pair the proposals](#) from the Cayuse SP side, then delete the Cayuse 424 proposal.

Deleted proposals are retained in the system until Permanent [Proposal Delete](#) occurs (or indefinitely if it is not active), but are no longer visible or editable. If you need to restore a mistakenly deleted proposal, request help from your local Cayuse 424 system administrators.

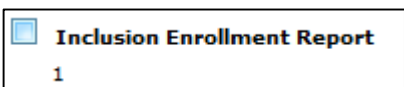
Navigating Your Proposal




When you start a new proposal in Cayuse 424, it assembles the required and optional forms for the funding opportunity you have selected. The forms are displayed in a list on the left side of the page. The selected form appears to the right of the list. Clicking the Proposals List link will return you to the Proposals List page.

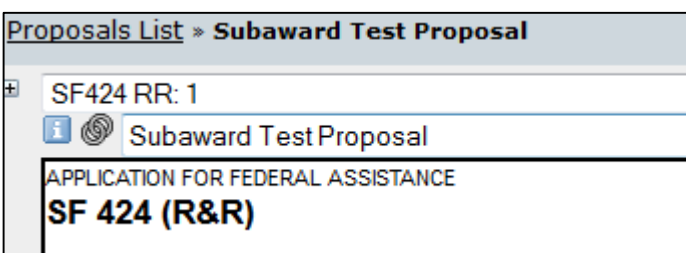


If one of the forms has a greyed-out checkbox beside it, that means that the form is mandatory to the submission of the Proposal. This form cannot be detached from a Proposal.

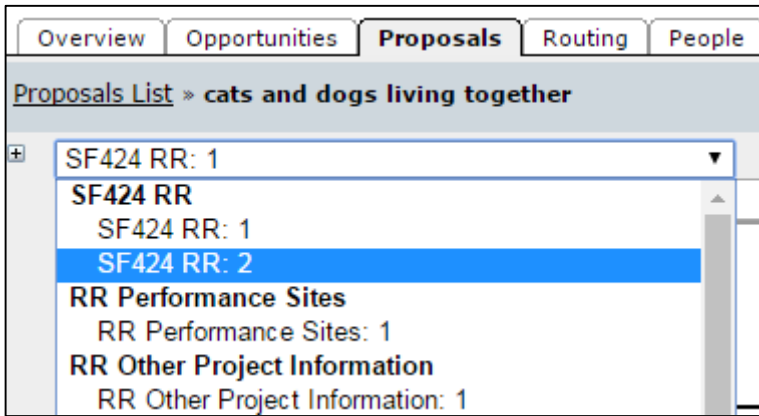
If a form has an enabled checkbox, then that means that the form is optional. Prior to submission, be sure that optional forms that you want to submit are selected.







At the top left of the list, there will be a  icon. Clicking this will cause the list to minimize, giving the full window to the currently selected form. It will also change the  icon into a  icon. Click the plus icon to bring back the list.

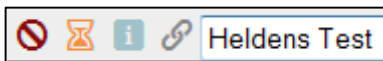



If you wish to navigate in this mode, click the dropdown menu at the top left of the page. This will allow you to select any of the forms in your proposal, while leaving the forms list collapsed.

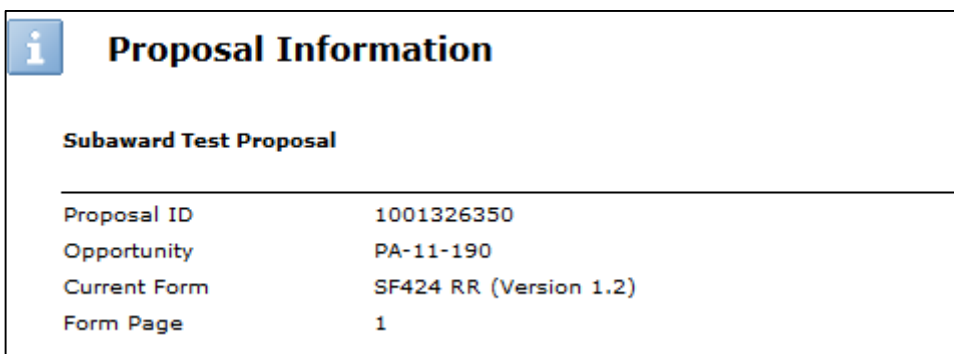



Proposal Information

The Proposal title is located at the top of the Proposal. Left of the title, icon   will be there. A  icon will appear if the opportunity associated with the proposal has expired, and an  will appear if the opportunity has been archived.



Clicking the  icon will cause a window to appear containing some useful information, such as the Opportunity number, the internal Proposal ID and the Date Last Modified. Additionally, you can use this button to find out what browser and version you are using when talking with Cayuse Research Suite Support.



The  icon will provide you with a direct link to the Proposal you are currently in. You can send this to colleagues and faculty who have permission to view the Proposal. This will allow them to easily access Proposals without having to navigate the Proposals List. You can also bookmark the Proposal for easy access in the future.




Proposal Quick Link

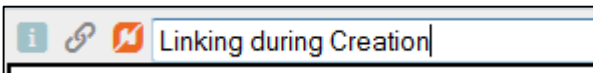
For proposal: Subaward Test Proposal

<http://iandemo.cayuse424.com/proposal.do?proposalId=1001326350>

To bookmark this proposal: Right-click the above URL, and select "Bookmark This Link..."


Opening a Paired Cayuse SP Proposal

If your institution uses Cayuse SP, and the Cayuse 424 proposal is paired with a Cayuse SP proposal, you will see a pairing icon . Clicking this icon will bring you to the linked Cayuse SP Proposal.





Autofill

When you [create a proposal](#), Cayuse 424 uses the information you provide to autofill institutional and personal information from the institution you select as the Organization and the person you select as the Principal Investigator. Autofill pulls data from a stored location into the proposal, where you can edit it manually or update it by re-autofilling.

There are several locations throughout the proposal where you can autofill stored data. Those locations are indicated by the  icon. Clicking this icon will bring up a selection dialog for a person, institution, or other type of stored data. The applicant organization information, administrative contact, Performance Sites, Key Persons, and other contact [fields](#) can generally be entered using autofill. This makes it easy to ensure that you have the correct information throughout the proposal.

Re-autofill

To re-autofill data that may have been updated since you began the Proposal, click on the  icon. This will overwrite any data that was previously autofilled into the proposal, as well as any data in the area that you may have entered manually.

 **Re-autofill this Performance Site?**

Do you want to update the information about this Performance Site on this proposal with the latest data from the associated Professional Profile?

Note: this operation may overwrite data in the current proposal, and cannot be undone.

When re-autofilling organizations using institutional profiles, be particularly aware that this action will refresh the indirect cost rates (see [My subawardee's indirect cost type isn't showing on my subaward. What can I do?](#)) and overwrite the Description field in F8-F10 of the RR Budget with the values from the [institutional profile](#). If you have budget values in F8-F10, be sure to check the Description after re-autofilling the institution.

Autofill depends on professional profiles being set up for the individuals, such as the PI and the Signing Official, and the organizations, such as the Performance Sites, that you are adding to the proposal. These profiles should be set up ahead of time if you wish to use Cayuse 424's autofill feature. See the [professional profiles](#), [Key Persons](#), and [institutional profiles](#) sections for more details.

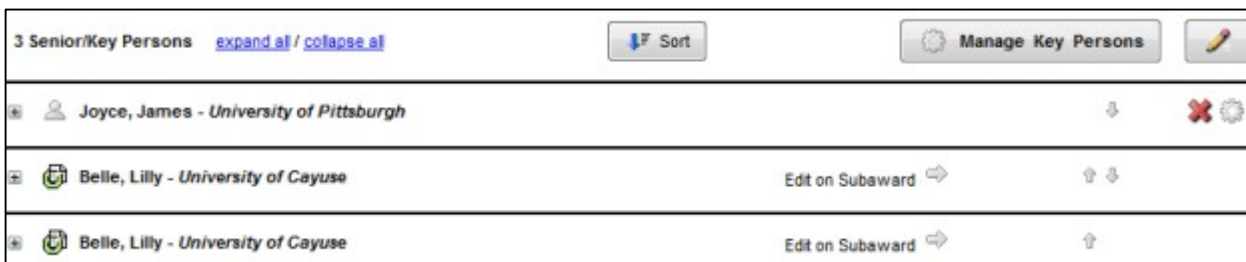
Key Persons


The Key Persons form displays the data for your proposal's Principal Investigator and associated Senior/Key Persons. You can edit their personal and budget details manually or using [autofill](#) and attach biosketches. You can also see data for Key Persons from your linked subawards.



Most proposals begin with a PI already assigned. If you have not assigned a PI, you can do so by clicking the pencil icon to the right of the PI slot, which will say **Unassigned** if there isn't currently a PI. This will allow you to [autofill the PI into the proposal](#).

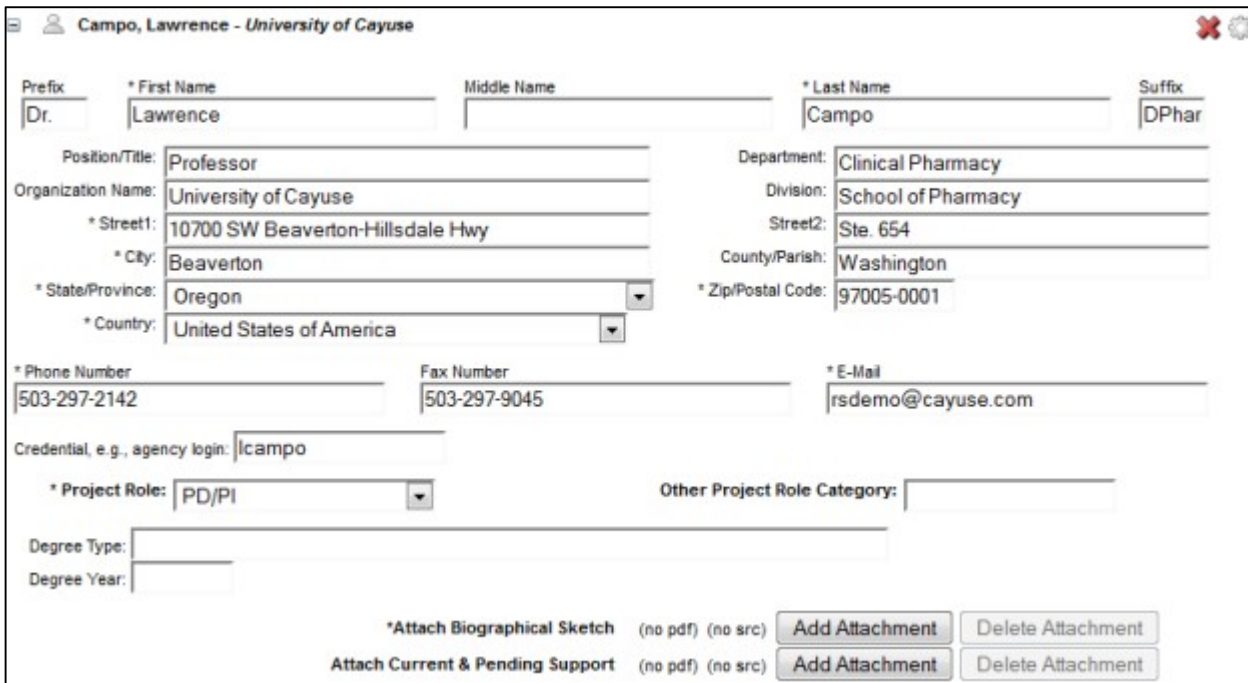
Clicking **Expand All** or **Collapse All** will show all the information for listed Key Persons or hide all of that information, respectively. Clicking **Sort** will order Key Persons by PD/PI, Co-PD/PI, Alphabetical, Other Significant Contributor. You can also manually sort by clicking the up arrows ↑ and down arrows ↓ to the right of the Key Persons.




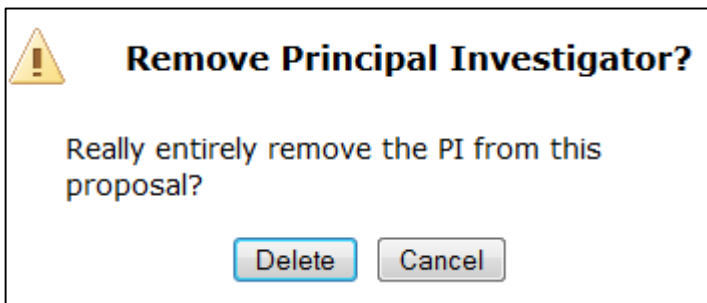
If you have existing personnel, you can view their details by clicking on the  icon to the left of each. If you have more than eight (40 for the expanded version) Key Persons, Cayuse 424 will automatically create PDF attachments for the additional Profiles as required by Grants.gov.

For Senior/Key Persons on the prime proposal, you can edit their information directly, or attach a Biosketch and a Current & Pending Support PDF.

NOTE: If the Key Person's address is outside of the United States or Canada, State/Province must be left blank.




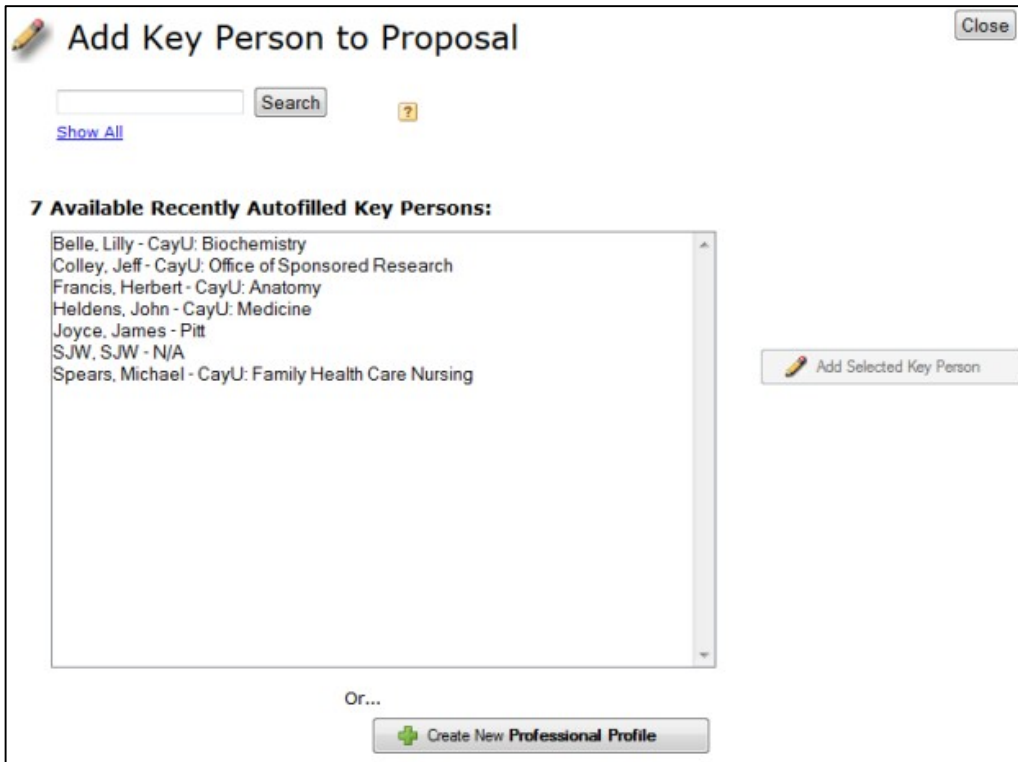
Clicking the  icon on a particular Key Person will prompt you to delete that Key Person from the Proposal. This will remove them the Proposal entirely, including any budget entries that they might have.



To add new Senior/Key Persons, [autofill them into the proposal](#). You can change data for existing Key Persons by [managing the Key Person](#).

Adding Key Persons

To add Key Persons to your Proposal, either click on the  icon on the RR Key Persons form or click **Add Key Person** in the Manage Key Persons dialog.




Add Key Person to Proposal Close

Search ?


[Show All](#)

7 Available Recently Autofilled Key Persons:

- Belle, Lilly - CayU: Biochemistry
- Colley, Jeff - CayU: Office of Sponsored Research
- Francis, Herbert - CayU: Anatomy
- Heldens, John - CayU: Medicine
- Joyce, James - Pitt
- S.J.W, S.J.W - N/A
- Spears, Michael - CayU: Family Health Care Nursing

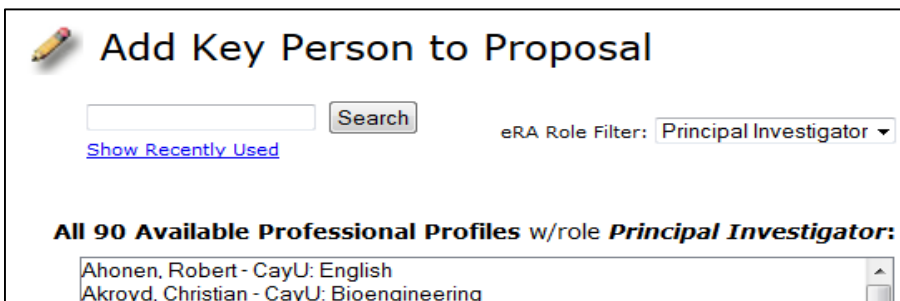
 Add Selected Key Person

Or...

 Create New Professional Profile

The dialog shows a list of Key Persons available for autofill. By default, this list shows recently used Key Persons. To view all available Key Persons, select Show All under the Search box at the top left.

You can also search for Key Persons to autofill using their first name, last name, institutional association, or department. Once you've found the person you're looking for, select their profile and click **Add Selected Key Person**. You'll be taken back to the list of Key Persons and can edit your new Key Person there. When searching or using the Show All function, you can also filter by eRA Role. Just select the role you are looking for from eRA Role Filter dropdown at the top of the page.



Add Key Person to Proposal

Search eRA Role Filter: Principal Investigator

[Show Recently Used](#)

All 90 Available Professional Profiles w/role *Principal Investigator*:

- Ahonen, Robert - CayU: English
- Akroyd, Christian - CayU: Bioengineering

When adding a Key Person, you will usually want to select Principal Investigator, as shown.



If you can't find the Key Person you want to add, then most likely the person doesn't yet have a professional profile, or you

don't have permission to use it. If you believe they do have a profile, contact your local administrator to get permission to use the profile.

If you're sure the person doesn't have a profile, click **Create New Professional Profile** at the bottom of the window. This will walk you through the creation of a professional profile (see [People](#)). Once you've finished creating the profile, it will autofill into the proposal and you'll be able to edit their information like any other Key Person.

If you attempt to create the profile and are warned that it may be a duplicate, consult your local administrator.


Managing Key Persons


Managing Individual: Clicking the  icon beside any Key Person brings up their data management screen, where you can manage the project role, appointment type, and budget data. (You can access the same screen through the person's entry in the [Budget form](#).) Clicking the  icon re-autofills their data from the linked Professional Profile. This replaces any data you've entered manually for the person. See [Key Person Budget Entries](#) for more information on editing this budget data.













Budget	Cal. Salary	Acad. Salary	Sum. Salary	Cal. Months	Acad. Months	Sum. Months	Req. Salary	Fringe Benefits	Funds Requested
prd 1	100.157	0	0						
prd 2	100.157	0	0						
prd 3	100.157	0	0						
prd 4	100.157	0	0						
prd 5	100.157	0	0						



Managing All Key Persons: Clicking the **Manage Key Persons** button at the bottom of the list brings up the Manage Key Persons dialog for all personnel, including the PI, whose entry shows as gray rather than the green background of other Key Persons. This is convenient when you need to edit multiple Key Persons without opening each one individually.

At the top of the window, you can choose whether to sort by Alphabetical Order or Key Person Form Order.

 **Manage 4 Key Persons** Viewing in Key Person Form Order ▾ Close

 Add Key Person



 	  Campo, Lawrence - University of Cayuse <input checked="" type="checkbox"/> Include Performance Site	Budget Periods: <input checked="" type="checkbox"/> 1 <input checked="" type="checkbox"/> 2 <input checked="" type="checkbox"/> 3 <input checked="" type="checkbox"/> 4 <input checked="" type="checkbox"/> 5
 	  Joyce, James - University of Pittsburgh	Budget Periods: <input checked="" type="checkbox"/> 1 <input checked="" type="checkbox"/> 2 <input checked="" type="checkbox"/> 3 <input checked="" type="checkbox"/> 4 <input checked="" type="checkbox"/> 5
 	Belle, Lilly - University of Cayuse	Edit on Subaward →
 	Belle, Lilly - University of Cayuse	Edit on Subaward →

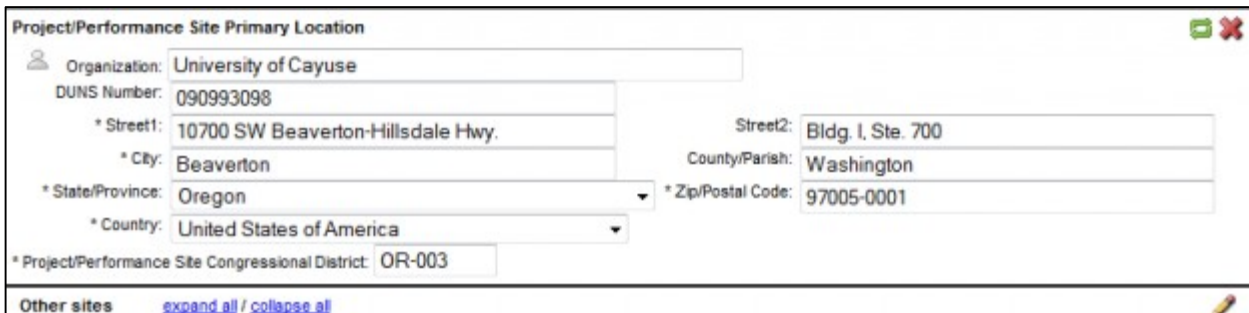
Clicking the  icon will take you to the Professional Profile that is linked to that Key Person. A  icon that means they are a Key Person on the Subaward. Subaward Key Persons cannot be edited on the Prime Proposal. Clicking **Edit on Subaward** will move you into the associated Subaward, where you can then edit their information.

If you have a Key Person who is contributing no measurable effort, then you can use this management window to indicate their role as Other Significant Contributor. To do so, follow the instructions as listed in [How can I include a Key Person on an NIH proposal without giving them Effort and/or Salary on the Budget?](#)

Performance Sites

The Performance Sites form displays the information for all your proposal's performance sites. To access the Performance Sites from, select it from the [form list](#) on the left of the proposal.

When a proposal is first created, the primary performance site (Project/Performance Site Primary Location) will be filled out if you have selected a PI or an organization. All of the fields shown here are editable. Clicking the icon to the left of the organization name will take you to the entity the performance site is linked to. Clicking the  icon will prompt you to re-autofill the performance site information from the associated [institutional profile](#). This will replace any data you've changed in the proposal with data from the profile. Clicking the  icon beside any performance site removes that performance site from the proposal.



Project/Performance Site Primary Location  

Organization: University of Cayuse

DUNS Number: 090993098

* Street1: 10700 SW Beaverton-Hillsdale Hwy. Street2: Bldg. I, Ste. 700





* City: Beaverton County/Parish: Washington

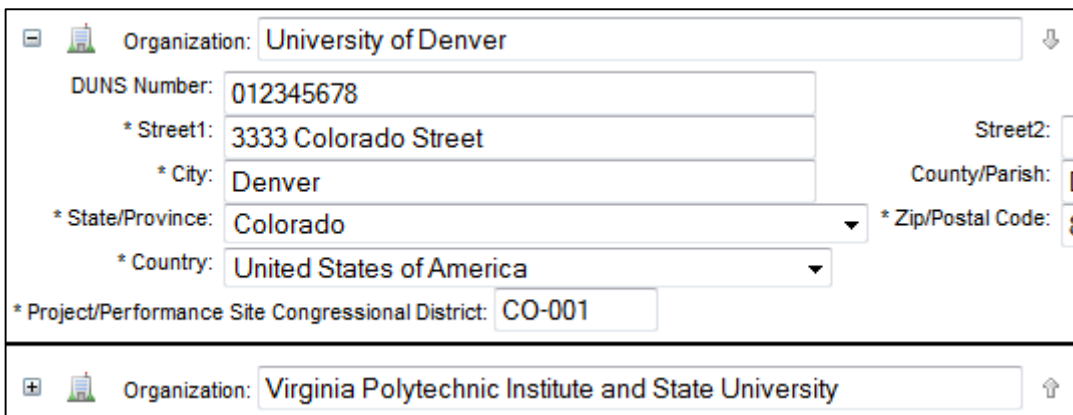
* State/Province: Oregon * Zip/Postal Code: 97005-0001




* Country: United States of America

* Project/Performance Site Congressional District: OR-003

Other sites [expand all / collapse all](#) 

For other performance sites, you can see all the sites' information, or just the names, by using the **expand all** or **collapse all** links. You can also use the plus icon  to the left of the performance site's name to expand it, and minus  to collapse. To change the order that other performance sites appear in, click the up arrow icon  or down arrow icon  next to the site name.



  Organization: University of Denver 

DUNS Number: 012345678




* Street1: 3333 Colorado Street Street2:

* City: Denver County/Parish: D

* State/Province: Colorado * Zip/Postal Code: 8

* Country: United States of America

* Project/Performance Site Congressional District: CO-001

  Organization: Virginia Polytechnic Institute and State University 

You can [add other sites to your proposal](#) by clicking the pencil icon below the Primary Performance site.

Subaward Performance Sites

When you link a subaward to your prime proposal, you can add its performance sites to your prime's performance sites page. To do this, navigate to the Performance Sites form in the subaward, and click the checkmark beside **Include in Prime**.

Project/Performance Site Location(s)	
Project/Performance Site Primary Location <input checked="" type="checkbox"/> Include in Prime 	
Organization:	University of Denver
DUNS Number:	1110123450000

By checking that box, the performance site will be added to the prime proposal. Clicking the icon will take you back to the prime, where you'll see the subaward performance site listed.

After including a subaward performance site in the prime proposal, you will see the words **Edit in Subaward** to the right of the performance site in the prime. Clicking that link will take you directly to the subaward, where you can edit the information for that performance site.

Adding Performance Sites

Usually, a primary Performance Site is added to the proposal during creation based on the PI's affiliation or the Organization selection.

If you've already added a primary Performance Site, to add additional Performance Sites to the list, click the icon on the right below the primary Performance Site. To add a primary Performance Site, click the at the top right of the form. The forms are similar except that the Primary Performance Site form only allows you to add one site, and suggests likely sites automatically.

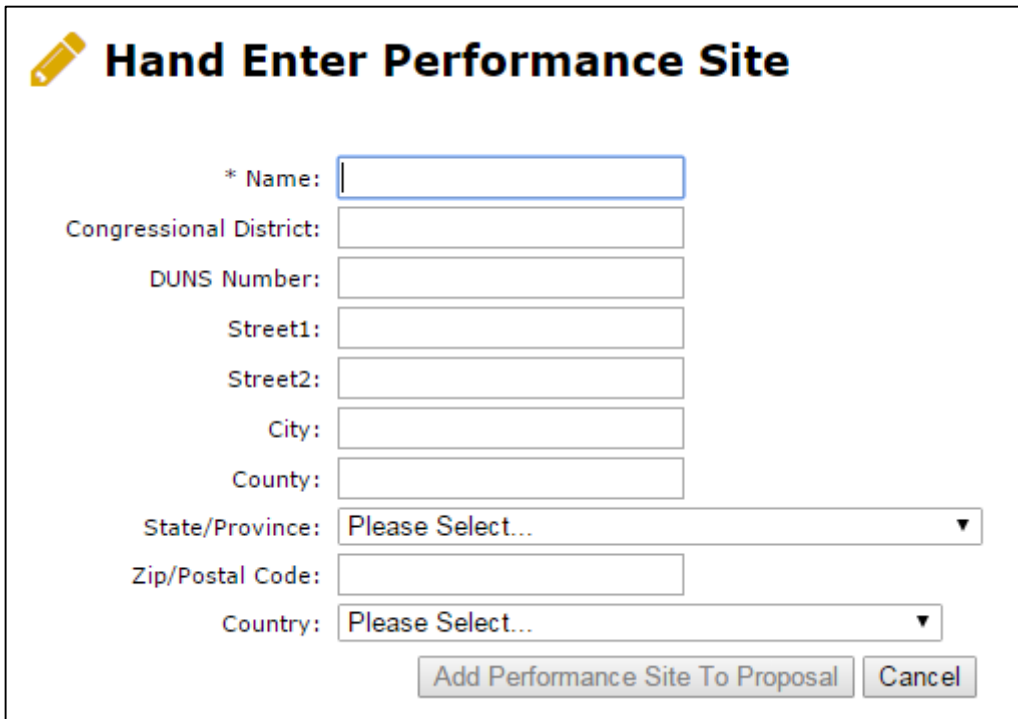
Other Performance Site Autofill	
<input checked="" type="checkbox"/> Also show available Institutional Profiles	
Select a Performance Site or	<input type="text" value="Hand-Enter a Performance Site"/>
<ul style="list-style-type: none"> Georgia Health Sciences University - Institutional Profile Oregon State University - Institutional Profile Swarthmore College - Institutional Profile The University of Tennessee Health Science Center - UTHSC - Institutional Profile University of California, Merced - UC Merced - Institutional Profile University of Tennessee, Institute of Agriculture - UT Institute of Agriculture - Institutional Profile University of Tennessee, Knoxville - UT Knoxville - Institutional Profile Utah State University - Institutional Profile Villanova University - Institutional Profile Virginia Polytechnic Institute and State University - Virginia Tech - Institutional Profile Weill Cornell Medical College - Institutional Profile 	

If you already have some performance sites, you'll see a list of sites that are already associated with the Proposal, and how they are associated with it: by Key Person () , by Subaward () , or by Institutional Profile ().

Project/Performance Site Location(s)	
Project/Performance Site Primary Location	
Organization:	University of Wattsamatta
DUNS Number:	123456789
* Street1:	123 Test St
* City:	North Pole
* State/Province:	Alaska
* Country:	United States of America
* Project/Performance Site Congressional District:	AK-011
Street2: <input type="text"/>	
County/Parish: <input type="text"/>	
* Zip/Postal Code: 99705-00	
Other sites expand all / collapse all	
	Organization: Evisions
DUNS Number:	123456789
* Street1:	2525 1st St
Street2: <input type="text"/>	


Clicking **Also show available Institutional Profiles** at the top of the page, as has been done in the screenshot above, will show all the Institutional Profiles available to add. Performance Sites that are already associated with the proposal will have a green background. Clicking the checkbox to the left of an Institution will add its location as a Performance Site to the Proposal. Clicking one of the icons will take you to the linked entity (Person, Subaward, or Institutional Profile).

You can also manually enter a Performance Site under Other Performance Sites by clicking the **Hand-enter a Performance Site** button at the top of the page. This will prompt you to enter all the location information you would normally enter into an Institutional Profile. When finished, just click **Add Performance Site to Proposal** and you will see it listed along with the other Performance Sites.



The form is titled "Hand Enter Performance Site" and includes a pencil icon. It contains the following fields and controls:

- * Name:
- Congressional District:
- DUNS Number:
- Street1:
- Street2:
- City:
- County:
- State/Province:
- Zip/Postal Code:
- Country:
- Buttons:

Hand entered Performance Sites are designated by the  icon. This does not create an Institutional Profile; it only enters the data into this proposal.


When you're finished, close the Performance Site Autofill window. You can edit Performance Sites on the form as necessary once you have added them.

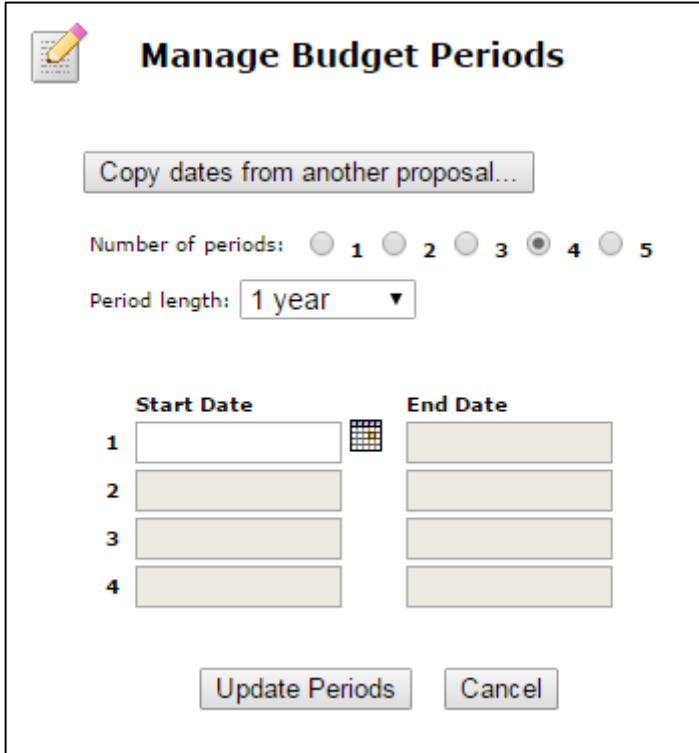
Budget

As in other sections of the proposal, Cayuse 424 presents you with the budget form that the opportunity has provided, and you can fill it out as you normally would. There are also many features such as autofill, [automated calculations](#), [budget period replication/escalation](#), and [indirect cost rate selections](#) to make the process of creating proposal budgets faster and more accurate.

Although Cayuse 424 automates much of the number crunching and validates the proposal as you work, always make sure to follow the instructions specific to your funding opportunity.

Budget Period Editor

The dates for your project periods must be entered in many places across the proposal. In any project period date field, you can use the Budget Period Editor to manage your project dates. Click the  icon to open the Budget Period Editor.



The screenshot shows the "Manage Budget Periods" dialog box. At the top left is a pencil icon. Below it is a button labeled "Copy dates from another proposal...". Underneath are radio buttons for "Number of periods:" with options 1, 2, 3, 4, and 5. The "4" option is selected. Below that is a dropdown menu for "Period length:" set to "1 year". The main area contains two columns of date fields: "Start Date" and "End Date". There are four rows of these fields, numbered 1 through 4. A calendar icon is visible next to the first "Start Date" field. At the bottom are two buttons: "Update Periods" and "Cancel".

You can select the number of periods, up to the number allowed by the form included in your opportunity package, or 10 for Other proposals. Usually the Period length is 1 year, but if you need a different period length, you can select 3 months, 6 months, or even create a custom period.

With a pre-selected period, all the dates will populate once you select the start date and the number of periods. If you have a custom period, you must select each period's start and end date manually.

- Click **Update Periods** to apply the changes.
- You can also use this to copy budget periods from another proposal, if you know you have a proposal with the same budget periods, by using **Copy dates from another proposal...**

If you are in a prime proposal that has a linked subaward, the following message will show:

- **Note:** Changes to dates and periods apply the same changes to linked subawards. If we have a subaward IDC rate schedule, budgets are recalculated upon subaward open.

Using the budget period editor automatically applies the changes to the period to linked subawards, to ensure that everything stays in sync. If the subawards also have an assigned IDC rate, budget calculations will automatically adjust to the new period selection the next time the subaward is opened.

Modular Budgets

Most opportunities require a detailed budget that provides specific information on the allocation of the budget to different categories of spending. However, NIH opportunities may also provide a Modular Budget form (PHS 398 Modular Budget) for proposals with up to \$250,000 in direct costs (less Consortium F&A) for certain mechanisms. More information can be found on NIH's [Modular Research Grant Applications page](#).

In Cayuse 424, opportunity packages with a modular budget will also have a detailed budget attached. Both budgets will be labeled optional, but you must select one to submit.

Although the modular budget is a replacement for the detailed budget at NIH, you may need to prepare a detailed budget for yourself or your institution's research office. In Cayuse 424, you can fill out the detailed budget, which includes many helpful calculation tools, and the numbers will automatically flow into the modular budget form. If this is not necessary, you can also manually calculate and enter the modular budget figures directly into the modular budget form. Be sure to separate out any Subaward Indirect Costs and enter them in the appropriate field.

You cannot submit detailed Subaward budgets with a Modular budget. If you check the subaward inclusion checkbox when you are using a modular budget, Cayuse 424 will display an error:

Error: [Subawards][NIH] A Subaward Budget Attachment Form may not be included if a modular budget has been submitted. (uncheck one of the inclusion checkboxes)

Proposals using a modular budget usually have a certain dollar amount introduced by the rounding up process from the actual to the module. If a local administrator has configured a default rate for Modular Budget Rounded Direct Costs in the [Institutional Profile](#), at the bottom of the Indirect Costs section, Cayuse 424 can automatically apply an indirect cost rate to this amount.

Automated Calculations

As you enter budget data in each budget period and category, Cayuse 424 takes the raw numbers you enter and creates subtotals and cumulative totals, and automatically fills those numbers and calculations into the appropriate fields on all applicable pages.

In general, to take greatest advantage of the automated calculations, you should start filling out the budget from the top, and only fill in totals where they don't automatically appear.

Calculated Fields

A [calculated field](#) derives its information from other fields where values have been entered directly, or from a calculation performed within the field on the entered value. Values in these fields are automatically calculated while you are filling in the form and are recalculated each time you enter data into a related field. In many calculated fields, you are permitted to overwrite the calculated values. In those fields where overwriting is permitted, a red star appears next to the field indicating that you have over-written it.

Base	Cal.	Acad.	Sum.	Cal.	Acad.	Sum.	Requested	Fringe	
Salary (\$)	Salary (\$)	Salary (\$)	Salary (\$)	Mons	Mons	Mons	Salary (\$)	Benefits (\$)	Funds Req. (\$)
100,157	100,157	0	0	5,000			45,000	★ 13,500	58,500

Caution: If you overwrite a calculated field, the information in that field will not be updated when you change the

information in other, related fields. This can cause your final values to be wrong! Use caution when overwriting calculated fields.

To return a field with a red star to its normal, calculated value, simply remove the number you have manually entered in the field. The calculated value will reappear.

If you are having trouble with errors that are resulting from out-of-date automated calculations, running [Final Review](#) checks all forms and fields for errors, and will update any calculated fields that have not been manually overwritten with an up-to-date value.

Percentage and Currency Fields


Most percentage and currency fields in the budget only allow entering numbers. Percentages must be entered as decimal numbers (e.g. 45.5 or 4.5). Dollar amounts should be entered as numbers, and will round to the nearest dollar. To see \$10.00, enter 10. If you enter 10.99, you will see 11 in the field.

In certain places, there are special fields which will accept either dollar amounts or percentages, such as the effort fields (Calendar, Academic, and Summer Months) and the Fringe Benefits field. In these fields, enter a plain number to get a dollar amount: entering 63.5 would yield \$64. Enter a percentage to see the dollar amount calculated based on the percentage. Entering 63.5% in the Fringe Benefits field displays a dollar amount equal to 63.5% of the Requested Salary.

Escalation and Replication

A common problem in creating budgets is that you have to enter the same or similar information across all your project budget periods. Cayuse 424 makes it easy to copy and even automatically escalate rates in your detailed budgets based on expected future cost increases.

- **Replicate** copies budget numbers on selected line items from one budget period to another.
- **Escalate** increases budget line items by a specific percentage across several budget periods.

Click on the  icon to bring up the dialog.

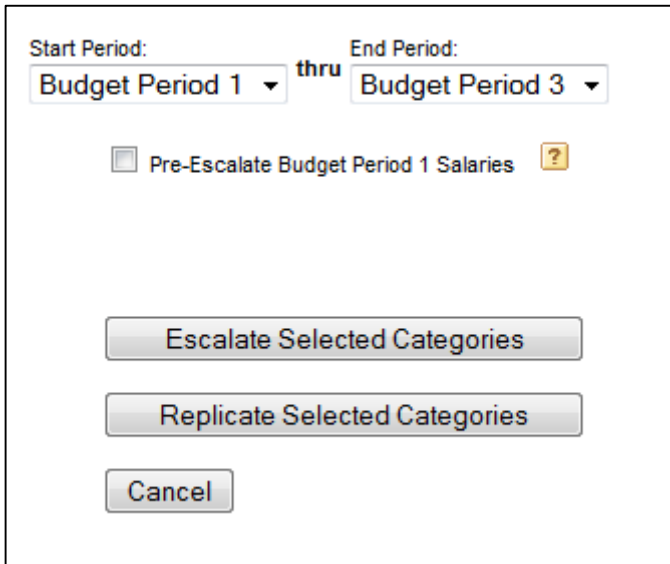


Enabled	Budget Category to Escalate/Replicate	Rate (%)
<input checked="" type="checkbox"/>	A.) Senior/Key Persons	<input type="text" value="3.0"/>
<input type="checkbox"/>	B.) Other Personnel - Salary	<input type="text" value="3.0"/>

You'll first see the current escalation rates for different budget categories. These are set in the [institutional profile](#) by an Admin, but you can change them within the proposal if necessary to meet your needs. Click the box next to a

category to enable escalation for that category. You can select any or all categories; there is a select all link at the bottom of the rate list so you can quickly select all the categories.


To the right you see the options for replication or escalation.



The screenshot shows a dialog box with the following elements:

- Start Period:** A dropdown menu with "Budget Period 1" selected.
- End Period:** A dropdown menu with "Budget Period 3" selected.
- A "thru" label between the two dropdowns.
- A checkbox labeled "Pre-Escalate Budget Period 1 Salaries" with a question mark icon to its right.
- Three buttons: "Escalate Selected Categories", "Replicate Selected Categories", and "Cancel".

You can choose which budget periods the escalation will impact. Under **Start Period**, select the budget period you want the replication/escalation to start from. Under **End Period**, select the budget period you would like the escalation/replication to inclusively end on.

Selecting **Pre-Escalate Budget Period 1 Salaries** (only enabled when Budget Period 1 is the Start Period) will escalate Budget Period 1 as well, which is not escalated by default. This is useful if Period 1 is in the future and cost increases are expected before the beginning of the period. Click the  icon for a more detailed explanation of this functionality.

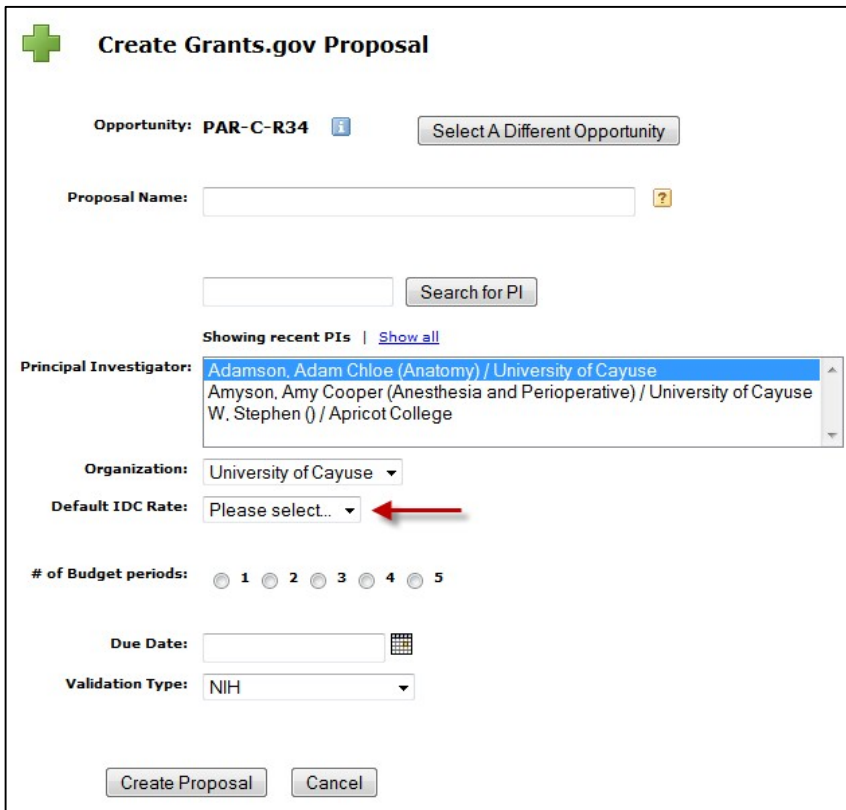
Let's say, as in the image above, Budget Period 1 is selected as the Start Period, and Budget Period 3 is selected as the End Period. Clicking **Escalate Selected Categories** would take the numbers in the selected categories from Budget Period 1, and escalate them through Budget Periods 2 and 3 according to the Budget Categories selected. Clicking **Replicate Selected Categories** would take the numbers in the selected categories from Budget Period 1 and copy them into Budget Periods 2 and 3.

Replication and Escalation also affect the [indirect cost rate selections](#). If you change the indirect cost type and then replicate, the indirect cost rate selection will also be replicated in outlying years.

You can also replicate and escalate budgets in the [budget sections of the Manage Key Persons dialog](#).

Indirect Cost (IDC) Rates

Indirect cost (IDC) rates are set up in the [institutional profile](#) for the organization [by an Administrator](#). When you create a new proposal, you are given the option to set your Default IDC Rate after selecting your organization, as shown below.



Create Grants.gov Proposal

Opportunity: **PAR-C-R34**

Proposal Name:

Showing recent PIs | [Show all](#)

Principal Investigator: **Adamson, Adam Chloe (Anatomy) / University of Cayuse**
Amyson, Amy Cooper (Anesthesia and Perioperative) / University of Cayuse
W, Stephen () / Apricot College

Organization:

Default IDC Rate:

of Budget periods: 1 2 3 4 5

Due Date:

Validation Type:

Once the proposal is created, the IDC rate you selected will be applied to the budget items where the [institutional profile](#) assigns the Selected Default Rate. If you ever need to change this selected base default rate, you can re-autofill the organization at the top of any budget form page in Cayuse 424, resulting in the following screen.



Applicant Organization Autofill

Organization:

Default IDC Rate:

Note: Autofill of the Organization will replace, if in use:

- EIN
- DUNs number
- Indirect Cost Type Names, Rates, & default choices
- Escalation Rate Defaults
- Type of Applicant
- Applicant Organization Contact Information

Note that even if you only want to update the IDC rates, you will replace all information that has been modified within the proposal with the default information from the institutional profile, including the descriptions for items F8-F10 of the RR Budget.

In the proposal, the default rates can be overridden by choosing different rates from the dropdown menu for each budget category. The totals for each rate are summarized in Section H of the RR Budget.

Key Person Budget Entries

You can access the budget entries for Key Persons from the Budget form or from the Key Persons form by using the **Manage Key Persons** button. The appropriate information from this dialog will flow into each form.

Appointment Type

When you are in the Manage Key Persons dialog, you'll see the person's Appointment Type as well as salary and fringe information for each budget period.

The screenshot shows a software interface for managing key persons. At the top, it identifies the user as 'Campo, Lawrence - University of Cayuse' and shows 'Budget Periods' 1 through 5 are selected. There are checkboxes for 'Include Performance Site' and 'Attach Biosketch'. The 'Role' is set to 'PD/PI'. Under 'Appointment type (months)', 'Calendar' is set to 12.00, while 'Academic' and 'Summer' are empty. Below this is a table with columns for Budget, Cal. Salary, Acad. Salary, Sum. Salary, Cal. Months, Acad. Months, Sum. Months, Req. Salary, Fringe Benefits, and Funds Requested. The table has five rows labeled 'prd 1' through 'prd 5'. In the first row, Cal. Salary is 100,157, Acad. Salary is 0, Sum. Salary is 0, and Cal. Months is empty.

Budget	Cal. Salary	Acad. Salary	Sum. Salary	Cal. Months	Acad. Months	Sum. Months	Req. Salary	Fringe Benefits	Funds Requested
prd 1	100,157	0	0						
prd 2	100,157	0	0						
prd 3	100,157	0	0						
prd 4	100,157	0	0						
prd 5	100,157	0	0						

The entries in the **Appointment type** fields determine which salary fields are available. Here, the PI, Campo, has a 12-month calendar appointment. The Calendar Salary and Calendar Months fields are enabled, while the corresponding Academic and Summer fields are disabled, because Campo does not have an Academic/Summer appointment type. If you need to change the Appointment Type, it's best to do so in the person's [Professional Profile](#) and re-[autofill](#) the data to the budget using the refresh arrows, or you may end up with numbers you can't edit.

Effort and Salary Calculations

To determine the requested salary, you can use the person's base salary as entered in the **Cal. Salary** or **Acad. and Sum. Salary** fields along with an effort entry in the **Months** field. For our PI, Campo, we can enter 3 in the **Cal. Months** field.


Budget	Cal. Salary	Acad. Salary	Sum. Salary	Cal. Months	Acad. Months	Sum. Months	Req. Salary	Fringe Benefits	Funds Requested
prd 1	100,157	0	0	3.000			25,039	15,023	40,062


This automatically populates the requested salary with the correct amount based on the effort. If the person has Fringe Benefits entered in their profile, these will also be calculated and added to the total in Funds Requested.

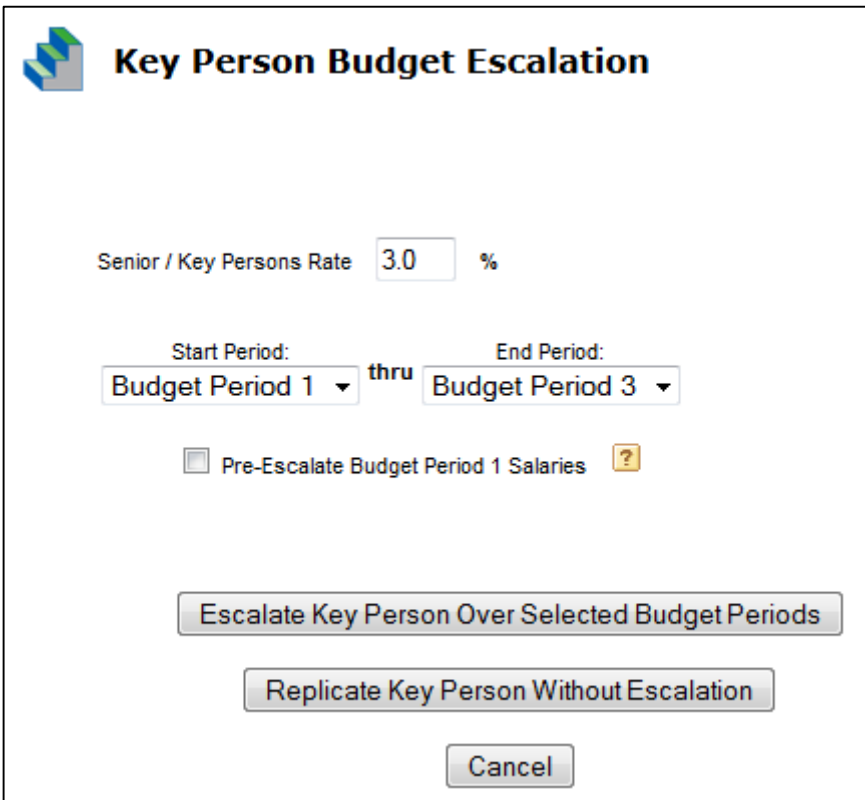
If you've calculated your effort in percentages rather than directly in person-months, instead of 3 you could enter 25%. This will immediately be converted to the correct number of person-months (using the total appointment duration as 100%) and the salary will be calculated as well.

If you attempt to enter values that are too large, you'll see an error message. Enter the correct number or percentage to correct the error.

Key Person Budget Escalation

To arrive at the correct requested salary for all budget periods, you can type in the numbers manually, but you can also use the Budget Escalation tool for Key Persons. Clicking the  icon to the left of the budget data opens the **Key Person Budget Escalation** dialog, where you can either simply copy the information across all periods, or escalate the budget for the Key Person over multiple budget periods based on expected increases in compensation. You can choose the rate of escalation and which budget periods the escalation will impact.

Pre-Escalate Budget Period 1 Salaries will escalate Budget Period 1, which is not escalated by default. Click on the  icon for a more detailed explanation of this functionality.



The dialog box titled "Key Person Budget Escalation" features a blue and green icon in the top left corner. It contains the following elements:

- A text label "Senior / Key Persons Rate" followed by a text input field containing "3.0" and a percentage symbol "%".
- Two dropdown menus: "Start Period:" with "Budget Period 1" selected, and "End Period:" with "Budget Period 3" selected, separated by the word "thru".
- A checkbox labeled "Pre-Escalate Budget Period 1 Salaries" with a help icon to its right.
- A large button labeled "Escalate Key Person Over Selected Budget Periods".
- A button labeled "Replicate Key Person Without Escalation".
- A "Cancel" button at the bottom center.

Selecting **Escalate Key Person Over Selected Budget Periods** will perform the escalation. Selecting **Replicate Key Person Without Escalation** will copy the same base salary across all the selected periods.

Budget Continuation Pages

For some proposals, the space provided on the detailed budget pages for **Senior/Key Persons** and **Equipment** is insufficient to include all the necessary entries. To address this issue, we've added the ability to enter an arbitrary number of line items. If you exceed eight Key Persons (40 for the expanded version) or 10 Equipment items, Cayuse 424 will generate and attach pre-formatted continuation pages which contain the overflow data. The total will reflect all the line items.

Attachments


Cayuse 424 allows you to attach PDF documents to your proposal to provide important supporting information for your submission. You can also upload the original format of the file, if there is one, to facilitate making changes to the file later. These source files will not be submitted.

Attaching a PDF Document: Each area where a file can be attached to a proposal form in Cayuse 424 will show the name of the attachment point on the left, and show two buttons on the right: **Add** and **Delete**. **Delete** will be disabled unless an attachment has been added.

18. SFLLL or other Explanatory Documentation	(no pdf) (no src)	Add	Delete
--	-------------------	-----	--------

To add an attachment:

1. Click **Add** to launch the Upload Attachment dialog.



Upload attachment

After uploading, please view the uploaded attachment to verify its correctness.

Name:	<input type="text" value="SfillOrOtherExplanation"/>
PDF file:	<input type="button" value="Browse..."/> No file selected.
Source of PDF: (optional)	<input type="button" value="Browse..."/> No file selected.
	<input type="button" value="Upload"/> <input type="button" value="Cancel"/>

Note that the default attachment name is based on the attachment point.

2. Click the first **Browse** button to select the PDF file. Browse for and select the file you want to attach from your computer, drive, or network.
3. If you want to add a source file as well, click the second **Browse** button and find the source file to include.
4. If you need to change the name of the attachment (for example, if agency policy requires a particular attachment name), edit the text in the Name field.
5. Click **Upload**.
6. The document(s) will be uploaded, and you'll see links you can click on to review them. Click **pdf** to view the PDF, and click **src** to view the source file.

Facilities [pdf](#) [src](#)

Cayuse recommends reviewing attachments after upload to ensure the upload completed successfully.

Clicking **Delete** will remove both files. If you want to replace just one file, just select **Add** again and upload a new document in place of the existing one.

File Formats: Cayuse 424 can submit only PDF documents as attachments. You can upload and attach a source file for your records, but only the attached PDFs will be submitted. PDF files containing active form fields cannot be uploaded, to avoid errors when the proposal is submitted through Grants.gov. See [Grants.gov and Agency PDF Requirements](#) for information on creating PDFs, 'flattening' PDFs, and meeting other Grants.gov and agency requirements.

What if my opportunity specifies a non-PDF format?

Agencies will sometimes request documents in other formats, or even request active PDF forms. In many cases, they will accept a flat PDF version of the file containing the relevant information, as long as the original file can be provided on request. In these cases, Cayuse recommends submitting the PDF via Cayuse 424 and including the source file in the proposal for later use. The source file will not be submitted directly to the agency, but can be sent separately if needed.

In rare cases, an agency may require submission in another document format. While normal users will be unable to upload non-PDF attachments, a local System Administrator can upload non-PDF attachments by following the [Attaching Non-PDF Files](#) guide.

If the agency is requesting submission of a PDF but requires that it contain active form fields, contact your local administrator to help you with that process, or [contact Support](#).

Attaching Biosketches

Biosketches are usually uploaded and attached to Professional Profiles as described in [Managing Personal Information](#). However, they can also be attached directly to proposals, as with any other proposal document.

Attaching Letters of Support

You may upload Letters of Support to the Research Plan page and check the inclusion box. If you have separate PDFs of several letters of support, click **Append**. Cayuse 424 adds the appended PDFs on to the existing PDF. This avoids any issues with bundling.

12. Letters of Support (no pdf) (no src)

Appendices

You may attach up to ten PDFs in this section; although, if you are submitting a proposal to NIH, you should follow the new guidelines regarding the content of the appendices.

Appendix (if applicable)
14. Appendix
1. (no pdf) (no src)

Grants.gov and Agency PDF requirements

Both Grants.gov and certain agencies, particularly NIH, have guidelines for attachment format and certain PDF-specific requirements. Cayuse recommends complying with Grants.gov and agency guidelines whenever possible, and always verifying the content of your proposal after submission to ensure that it was transmitted correctly.

Creating PDFs

If you need to create a PDF from another documents (including creating 'flat' PDFs from PDFs with active fields), you can use a PDF creation utility, either a standalone program such as those [recommended by Grants.gov](#), or built-in features such as the "Save as PDF" feature in Mac OSX and in Microsoft Word 2007 and later. If you are using a standalone program, simply printing the document to PDF again after opening it in the program is usually enough to flatten active fields as well as comments and stamps (see below).

Cayuse 424 will automatically change special characters (such as &, -, *, %, /, #, periods, spaces, and accented characters) in PDF file names to underscores, so no alterations should be required. Attachment names should be no longer than fifty (50) characters.

Note: When attaching a document, be sure that you do not attach a blank document by mistake.

NIH (eRA Commons) PDF Requirements

In addition to the requirements for submission through Grants.gov, the NIH has extensive [recommendations for successful PDF submission](#). Cayuse suggests that you pay special attention to Guidelines 2, 3, 6 and 7:

- Avoid bundling multiple PDFs into a single file. For instructions on attaching Letters of Support, see below.
- Avoid producing PDFs by scanning printed documents. Use recommended PDF creation software instead.
- Disable any security features such as encryption or password requirements.
- Do not attach PDFs that contain "stamps" (commonly used for signatures) or other comments. Such PDFs may not be correctly transmitted to the eRA Commons, or may cause errors in other attached documents.

The NIH also requires special preparation for the Research Plan attachment. Cayuse 424 provides a tool to make this preparation easier by allowing a single document to be "exploded" into individual section during the attachment process. See [Preparing the Research Plan](#) for more information.

Preparing the Research Plan for NIH Proposals

Unlike other Agencies, NIH requires that the research plan be submitted as separate PDF files, each containing specific document sections.

Cayuse 424 gives you the option to upload each section separately, or upload a composite PDF containing all of the required sections. If you would like to upload a composite PDF, format the research plan as described below. The following section contains instructions on how to attach a composite Research Plan document and use Cayuse 424 to separate each section of the document into individual PDFs, as required by NIH. To create a Research Plan with consistent styles, footnotes, and bibliography, NIH recommends preparing it as a single document.

The exact procedure you follow to generate your PDF depends on your word processor, operating system, and PDF generation capabilities. Using your PDF creation tool, create a single PDF containing:

- section headings that follow the NIH naming conventions
- Page breaks at the section headings
- No page headers or footers

While the standard page limits for the Research Plan are still in effect, NIH realizes that splitting the Research Plan into these several PDFs can result in the total number of PDF pages exceeding the opportunity page limit. **This is acceptable to NIH but you are strictly limited in the amount of text!**

Note: Save a Word Document as PDF


- **Windows:** In Word 2010 and later, click Save As and set the file type to PDF to save the document as a PDF.
 - If you are using Word 2007 you can [download and install](#) the "Save As PDF" feature from Microsoft and use it to generate your PDF.
 - Alternately, you can use Adobe Acrobat to produce the PDFs, if you have it. Other options include [CutePDF Writer](#) (freeware) and other technologies mentioned by [Grants.gov](#).
- **Macintosh OS X:** In OS X you can use the <Save as PDF> button on the print dialog to generate a PDF. Because the "Exploder" upload software now adds bookmarks to the PDFs, you do not need to use the "Add Bookmarks" utility.

Attaching the Research Plan

Cayuse 424 has a special tool built into the Research Plan page, called the "Exploder." The Cayuse 424 Exploder expects a single PDF file with the required section headings and page breaks. As with the Biosketch PDFs, the PDF must omit header and footer information, complying with NIH requirements.

In Cayuse 424, the Exploder:

- allows you to upload a single PDF,
- "explodes" the PDF into sections,
- attaches each section to the correct location in the proposal.

2. Research Plan Attachments:	
Please attach applicable sections of the research plan, below.	
0. Composite PDF. 	ResearchStrategy pdf (no src) <input type="button" value="Add"/> <input type="button" value="Delete"/>
1. Introduction to Application (for RESUBMISSION or REVISION only)	2_Summary_Abstract_rasMAPK pdf (no src) <input type="button" value="Add"/> <input type="button" value="Delete"/>
2. Specific Aims	SPECIFIC AIMS pdf (no src) <input type="button" value="Add"/> <input type="button" value="Delete"/>
3. * Research Strategy	ResearchStrategy pdf (no src) <input type="button" value="Add"/> <input type="button" value="Delete"/>

To attach and automatically explode the Research Plan:

1. Go to the Research Plan page
2. Click **Add** next to the "0. Composite PDF" field.
3. Browse to and select the PDF file, and, if desired, the source file. You may upload both the PDF and the original word processing document if you wish. Only the PDF is submitted with the proposal, but the source document can be uploaded for safekeeping and subsequent revision.

Upload attachment	
Name: (required)	<input type="text" value="Demo"/>
PDF file: (required)	<input type="text" value="v8_TimeTravel.pdf"/> <input type="button" value="Browse..."/>
Source of PDF: (optional)	<input type="text" value="v8_TimeTravel.doc"/> <input type="button" value="Browse..."/>
<input type="button" value="Upload"/>	

If you upload a properly formatted Research Plan, the Cayuse 424 Exploder will:

- add PDF bookmarks, which mark the start of each top-level section
- display a Feedback window listing the found section headers
- attach known sections on the Research Plan Page
- attach the Bibliography on the Other Project Information Page
- attach the Commercialization Plan on the SBIR Page (when appropriate)

You may upload the PDF as many times as you need to, but be aware that each upload overwrites the previous uploaded PDF and the attached sections derived from it. The Targeted/Planned Enrollment, Inclusion Enrollment, Letters of Support, and the Appendix are not affected by multiple uploads.

Validations

Cayuse 424 validates each proposal against the published funding opportunity rules, Grants.gov schema requirements, and other agency-specific rules.

The validation messages you see depend on the validation type that is selected. Usually Cayuse 424 will select the correct validation type for you, but if you need to change it, see [Choosing a Validation Type](#).

The current tally of errors, warnings, and info tips is shown on the **Error/Warning/Info** button at the bottom of the proposal next to the validation type selection. Click the **Error/Warning/Info** button to display the list.

12. PROPOSED PROJECT:
Start Date: 01/01/2017
Ending Date: 12/31/2021

13. CONGRESSIONAL DISTRICT OF:
Applicant: OR-003

14. PROJECT DIRECTOR/PRINCIPAL INVESTIGATOR CONTACT INFORMATION

Prefix: Dr. First Name: Jennifer Middle Name: Last Name: Amstead Suffix: D.D.

Error (41) / Warning (5) / Info (1) NIH Final Review

Error: [SF424rr 2.16][NIH] Select the [PROGRAM IS NOT COVERED BY E.O. 12372](#) radio button

Error: [SF424rr 1.1] One of the [Type of Submission](#) radio buttons must be selected

Error: [SF424rr 1.5] A [First Name](#) for the contact person of the Applicant Information must be provided

Error: [SF424rr 1.5] A [Last Name](#) for the contact person of the Applicant Information must be provided

Error: [SF424rr 1.5] A [Position/Title](#) for the contact person of the Applicant Information must be provided

Error: [SF424rr 1.5] A [Street1](#) street address for the contact person of the Applicant Information must be provided

The format of the validation issues is follows:

- **Type of Issue:** [Location of Issue][Agency] Issue description.

The location of the issue indicates the form where the issue is. If the issue is agency-specific, the agency name appears in the second set of square brackets. Otherwise, the issue is a Grants.gov validation issue that applies across all agencies. If the description contains a blue link, you can click on the link to be taken directly to the location of the issue.

If [Cayuse] appears in the second set of square brackets, the validation issue represents general best practices in grant creation. Most Cayuse validations are info tips.

Errors

Errors indicate serious issues that may prevent successful submission to Grants.gov or acceptance by the agency, usually involving required questions, fields, or attachments; or they may indicate inconsistencies between different parts of the proposal.

Error: [Subawards][Cayuse] Subaward [Copy of Copy of Copy of test21](#) may have [errors](#). Please navigate to the subaward proposal to automatically update this.

Error: [Cover Page Supplement 1.3] Applicant Organization Contact's [Title](#) is required

Error: [Cover Page Supplement 2.4] Answer [HESC involved](#) question

Error: [Research Plan 2.2][NIH] The [Specific Aims](#) attachment is required

Resolving errors before submission is generally very important since they can prevent successful submission. In particular, errors with no agency name will prevent successful submission of the proposal to Grants.gov, and must be resolved prior to submission. However, if your opportunity instructions are different from the validation requirements you are seeing, consult the Knowledge Base article entitled [I'm getting errors or warnings at the bottom of my screen that contradict my opportunity instructions.](#)

Warnings

Warning: [Other Project Info 11][Cayuse] The [Equipment Attachment](#) is missing. Is this intentional?

Warning: [Budget K, BJ][Cayuse] A [Budget Justification](#) is missing. Is this your intention?

Warnings are recommendations that will not stop submission, but remind you about potentially important items to include or issues to resolve. Warnings highlight situations that may cause problems when your proposal arrives at the agency. In most cases, we suggest that you follow the warnings given by Cayuse 424, but if your opportunity has different requirements, follow the instructions provided for your opportunity.

Info

Info: [PHS 398 Cover Letter][Cayuse] [Cover Letter](#) is often recommended.

Info tips are reminders that specifically target best practices. Their goal is to make sure your proposal has all the elements desired, such as cover letters and other optional attachments. Disregarding info tips will not usually cause serious issues, but you should always follow your opportunity instructions.

For NIH proposals, Cayuse recommends you review the NIH websites on [Preparing](#) and [Applying](#).

Note: If you are submitting a subaward and are seeing Info tips recommending documentation in the prime, see [Subaward Validations](#).

Validations for Multi-Project Proposals

Multi-Project proposals are not just validated on an individual basis, but also on an entire project basis. To see a list of the validations that Cayuse 424 runs against Multi-Project Proposals, take a look at [Validation of Multi-Project Proposals](#).

Tracking Proposals

Cayuse 424 offers several tools allowing you to control access to proposals and track their progress through development and submission. Those tools are accessed on the toolbar in the upper right corner of the proposal screen, or under **Proposal Management** located below the forms list on the left side of the screen.

Overview Opportunities **Proposals** Subawards Routing People Institutions Reports Admin

Proposals List - a name Proposals List

SF 424 R&R

NS Performance Sites

NS Other Project Information

NS Key Persons

NS Personal Data

NS Budget

NS Subaward Budget Attachments

NSF Cover Page

NSF Deviation Authorization

NSF Suggested Reviewers

Proposal Summary

Summary

Documents

APPLICATION FOR FEDERAL ASSISTANCE

SF 424 R&R

1. TYPE OF SUBMISSION

Pre-application

Application

Changed/Corrected Application

2. DATE SUBMITTED

3. DATE RECEIVED BY STATE

4. a. Federal Identifier

5. AGENCY ROUTING NUMBER

6. Previous Grants.gov Tracking ID

7. APPLICANT INFORMATION

Legal Name: University of Cayuse

Department:

Street: 10711 SW Beaverton-Hillsdale Hwy

City: Beaverton

State/Province: Oregon

Country: United States of America

Organizational DUNS: 033374276

Division:

Street: Bldg III, Ste 654

County/Parish: Washington

Zip/Postal Code: 97005-4742

Person to be contacted on matters involving this application

Public: First Name: Cayuse Middle Name: Last Name: Admin Title:

Position Title:

Street:

City: Beaverton

State/Province: Oregon

Country: United States of America

Street:

County/Parish: Washington

Zip/Postal Code: 97005-4742

Phone Number: Fax Number: Email: redemo22222@cayuse.com

8. EMPLOYER IDENTIFICATION NUMBER (EIN) (TIN): 1-870543210-01

9. TYPE OF APPLICANT:

H. Public/State Controlled Institution of Higher Education

Other (Specify):






Small Business Organization Type

Women Owned Socially and Economically Disadvantaged

10. NAME OF FEDERAL AGENCY:

Icons

Each of the Proposal Management tools is marked by an icon. The following table illustrates the icon for each tool and describes what that tool does.


Icon	Description
	<p>Permissions. Clicking on the key icon will take you to the Permissions screen where you can manage user access and permissions on the proposal.</p>
	<p>Routing and Approval. Takes you to the routing and approval screen where you can build and manage the proposal's routing chain, approve the proposal, retract approval, and view the proposal's routing history.</p>
	<p>Electronic Submission. Click on the yellow lightning bolt to validate and submit the proposal. If the proposal has already been submitted, you can retrieve submission information.</p>
	<p>Proposal History. Opens the Proposal History screen where you can view an overview of the proposal as well as the history of edits and other activities on the proposal.</p>
	<p>Export. Sends you to the Proposal Export screen where you can validate, name, and export the proposal to another Cayuse 424 system.</p>

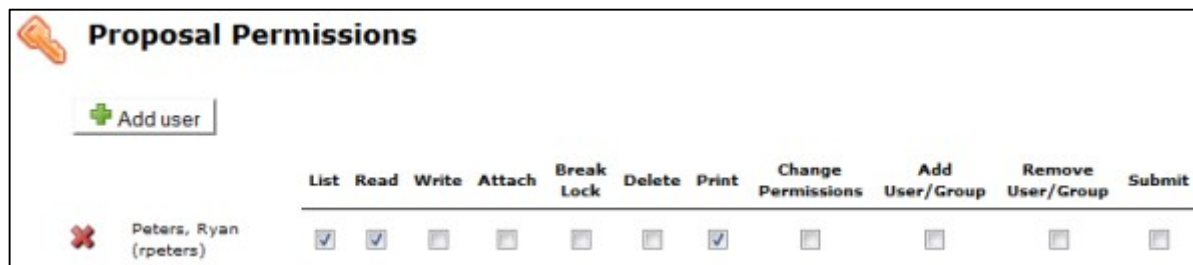
Permissions


Proposal permissions in Cayuse 424 allow you to control access to your proposals. By default, the creator of a proposal and the System Administrators have access to the proposal. Depending on your institution's Cayuse 424 configuration, the Pre-Award Admins may also have automatic access to your proposal. Some institutions also make use of the Read-only Reviewer role. People with this role can see and review all proposals in the system, but cannot make any changes.

Other users cannot see or edit a proposal unless they are given permissions to do so. To grant someone particular permissions to a proposal, there are two permission types that you need to have yourself.

Viewing Current Permissions

1. Open the proposal.
2. Click the  icon in the upper right corner, or in the left sidebar under Proposal Management, to go to the Proposal Permissions.



	List	Read	Write	Attach	Break Lock	Delete	Print	Change Permissions	Add User/Group	Remove User/Group	Submit
 Peters, Ryan (rpeters)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The Proposal Permissions screen lists users who have access to the proposal, and indicates what type of access they have. This list only includes users who have been given access through this screen, not all the users who can see the proposal because of their Administrator or Reviewer status or their presence in the routing chain.

In order to edit the list, you need to have Administrator permissions, or you must appear in the list with the **Change Permissions**, **Add User/Group**, or **Remove User/Group** boxes checked. If you don't have these permissions, you won't be able to add or remove people from the permissions, or change which permissions they have.

Adding a User

1. Click the **Add user** button.
2. Select a user from the list, or search for another user by their name or username. Use **Show All** to show all users. The user is added to the Proposal Permissions. If the user is grayed out, they have already been added to the permissions.

Add Security Principal [close](#)

[Show All](#)

Select *Users* below to provide access to this Proposal.

Recently Used: 5 principals

Type	User	Profile Name
U	rpeters	Peters, Ryan
U	kbaker	Baker, Kim
U	ktobin	Tobin, Katherine
U	sweaver	Weaver, Stephen
U	callen	Allen, Cuba

3. Close the selection window by clicking the **Close**.

Editing Permissions


Once you've added someone to the permissions, you can change their permissions (if you are allowed to do so) by checking and unchecking the boxes to give them the right level of access.

Permission Types

Permission	Meaning
List	Can see the proposal in lists, but cannot open it for review.
Read	Can see the proposal in lists and open it for review, but not modify or print it.
Write	Can open and edit the proposal. (The Final Review action requires this permission because it recomputes values throughout the proposal.)
Delete	Can delete the proposal.
Change Permission	Can change permissions for this proposal, including their own. (This permission essentially allows complete control.)
Add/Remove User	Can add or remove a user from the proposal's permissions (but not modify which permissions are granted).
Attach	Can upload attachments to the proposal.
Print	Can print the proposal.
Submit	Can electronically submit the proposal to Grants.gov.
Break Lock	Can take write access away from another user who is editing the proposal. (Use this permission with caution; breaking the lock can result in the loss of unsaved changes.)

Removing a User

Once a user has been added to a proposal you can determine how much access to provide by editing the permissions (if you are able to do so). If it is no longer appropriate for a user to have any access then they can be removed from the proposal entirely.


To remove proposal permissions from a user, click the delete icon  next to the name in the Proposal Permissions. The user will no longer be able to see or access your proposal.

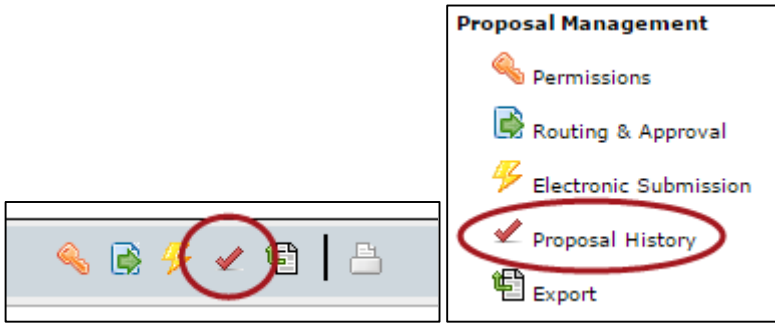
Paired Proposals

Permissions for paired proposals are set in Cayuse SP and synced to Cayuse 424. If there are existing permissions on a Cayuse 424 proposal, those permissions will be overwritten by the permissions from Cayuse SP when the proposal is paired.

Note: If a Cayuse 424 user's write permission is removed while they are editing a proposal, they will only be able to edit and save on the page they are working on. When they navigate away from that page, the removed write permission will be recognized and they will no longer be able to save changes.

Proposal History

To access the Proposal History from any proposal screen, find the  icon at the top right corner of the proposal, or click Proposal History at the bottom of the left side proposal forms list.





The proposal activity logged includes the Date/Time, username and a summary for the following actions:

- Create Proposal
- Upload Attachment
- Delete Attachment
- Save Proposal (which includes form changes)
- Approve/Retract Proposal (routing comments are logged)
- Validate Proposal


This change history can be filtered or exported as a .csv file.



The Proposal History can be filtered by date to narrow the shown results and locate a particular entry. This page also contains a Proposal Overview that summarizes identifying information about the proposal.

 **Proposal History**


 **Proposal Overview**

Opportunity	G.g AT07 and NIH Ext-UAT Test FOA (T01)
Opportunity Number	PA-C-T01
Internal Proposal Title	Outer Space
Total Proposed Costs	\$261,261
Sponsor	National Institutes of Health
PI	Bowie, David New Order (503) 717-9912 cwest@cayuse.com
Submission Date	

 **Proposal History**

Show activity from:  to: 

[Show All](#)

Page: **1** [2](#) [3](#)  (showing results 1 - 30)

Date/Time:	Username:	Person:	Action:	Summary:
2016-09-28 07:26	cayuseadmin	Cayuse Admin	View Proposal	Opened for edit

Note: Any user with view access to the proposal can see the Proposal History.

Submission

To successfully submit a proposal from Cayuse 424 to Grants.gov, the proposal must be complete and must conform to Grants.gov and agency requirements, including the form data and attachments.

To access the Electronic Submission area of the proposal, [open the proposal](#) and click the ⚡ icon along the top or in the left sidebar.



The Electronic Submission information has three sections: Opportunity Details, Proposal Submission History, and Electronic Submission.

Opportunity Details

By default, the Opportunity Details are hidden. To show them, click the plus sign next to Opportunity Details. This is a quick way to verify which opportunity the proposal was [created](#) with, and get information such as the Agency Contact and Closing Date.

Opportunity Details	
Opportunity	G.g AT07 and NIH Ext-UAT
Opportunity Number	PA-B2-R01
Competition ID	ADOBE-FORMS-B2
CFDA #	93.838
CFDA Description	Lung Diseases Research
Offering Agency	National Institutes of Health

Proposal Submission History

If the proposal is in development and has not been submitted previously, the Submission History will be empty:

Proposal Submission History			
S2S portal Tracking	Received Date/Time	Submitter	Message

Once a proposal has been submitted, the tracking number, submission date, and who submitted it will appear here:

Proposal Submission History			
S2S portal Tracking	Received Date/Time	Submitter	Message
GRANT00566396	2013-04-19 08:53:35 PDT	gsutraining8	Successfully received by S2S port

If you click on the tracking number, the status of the proposal in the portal will be retrieved, and you can find out whether it has been validated and whether the agency has retrieved it. Once the agency has retrieved the proposal, if the agency has its own electronic portal, such as the NIH eRA Commons or NSF Fastlane, the proposal should appear there, and the PI will be able to review and/or edit them to ensure that the transmission was successful and accurate.

If the status that is returned is **Rejected with Errors**, the proposal was received, but the portal rejected it for some reason, commonly that it was past the deadline, or did not pass validations (see below). If you have any questions about this, especially if you may need to resubmit to meet your deadline, please [contact Support](#) immediately.

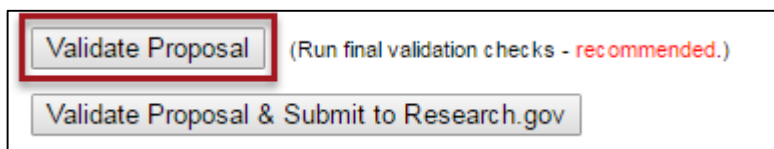
If the message field indicates that the submission was not successful, and/or it does not have a GRANT tracking number, then there was probably an error of some sort in transmission. See Troubleshooting below.

Electronic Submission

This is where you submit a proposal that has been fully and correctly prepared. If your institution uses [Cayuse 424's electronic routing](#), the proposal must also be successfully routed and approved by the final approver, usually an AOR. Each institution has its own policies and procedures for routing and submission. Be sure you are familiar with your institution's process before proceeding with submission.

The target for the submission is shown (usually Grants.gov).

Before submitting, we strongly recommend that you verify that there are no errors shown in the [Errors/Warnings/Info section](#), then click **Validate Proposal**.



This checks your proposal for both the usual types of validation errors and errors in the construction of the XML data that is submitted to Grants.gov. The XML validations are not run during proposal editing because the XML changes rapidly as you enter data, so this is an important step to catch potential errors.

If there are any problems with the XML, you'll see the following warning:

Proposal Does Not Conform To Requirements

The portal will reject this proposal! Contact Support (ResearchSuiteSupport@Evisions.com, 503.297.2108 x201) if you need help.

This will be followed by the error count and a description of each error. If you read the error descriptions carefully, you can often understand what the problem is. However, if you are having any trouble, or if your deadline is approaching, contact Support right away.

If your proposal is error free after running the validations you will get a "No Problems Detected" report.



At this point, you are clear to click the **Validate and Submit to Grants.gov** button and the proposal will be sent to Grants.gov.

Troubleshooting

The S2S submission process is normally very stable. However, users very occasionally experience connectivity problems when submitting proposals. This is more common during heavy usage times around deadlines, and it does not necessarily mean that the transmission of your application has failed. In the event that an anomaly occurs, we recommend:

- Checking your email for a Grants.gov Receipt email containing the GRANT tracking number;
- Checking your email for a Grants.gov Acceptance or Rejection email containing the GRANT tracking number;
- If you're seeing "Check Status" in place of your GRANT tracking number, clicking the link to see if the GRANT tracking number populates.

If you have not received a GRANT tracking number after following the steps above, [contact Cayuse Research Suite Support](#).

Subawards

In Cayuse 424, a subaward is essentially a simplified proposal which contains only a detailed budget, a Performance Site form, and a simplified Key Persons form (with no slot for PI). Like a prime proposal, subawards can use professional profiles, institutional profiles and indirect cost rates specific to the proposing organization if they are available.

Subawards in Cayuse 424 may be standalone, or they may be [linked to a prime proposal](#). Standalone subawards can be viewed in the Proposals tab, while linked subawards are displayed in the Subawards tab.

The Subawards tab appears at the top of Cayuse 424 just to the right of the Proposals tab whenever you are viewing a prime proposal that has at least one linked Subaward.



The tab shows all the subawards for the currently-open proposal.

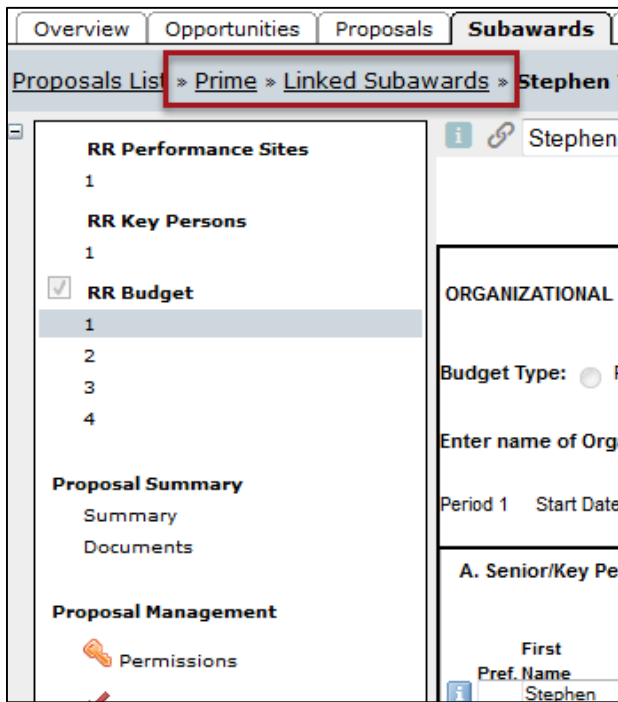
In both cases, you'll see [similar forms](#) when you access the subaward.

Most Cayuse 424 customers can also [import subawards](#) that were created in another system (either Subawards.com, Adobe, or another instance of Cayuse 424) and [export subawards](#) for use by other Cayuse 424 customers.

Navigating Subawards

Navigating a subaward proposal is essentially the same as [navigating any other federal proposal](#). Refer to the links in that section for information on editing [Key Persons](#), [Performance Sites](#), and [the budget](#). The primary difference is that the PD/PI slot is not available in a subaward (since that role is occupied by a person on the prime proposal).

When you open a standalone (unlinked) Subaward, it opens in the Proposals tab and behaves [like any other proposal](#). When you open a linked subaward, you will see the highlighted connection in the navigation "[breadcrumbs](#)."



These breadcrumbs allow you to easily navigate between a prime proposal and its linked subawards. Clicking Prime will move you to the prime in the Proposals tab, while clicking **Linked Subawards** will move to you a screen where you can select any of the subawards linked to the prime.

Entering Subaward Data

Subawards that are linked to a prime proposal can display Key Persons, Performance Sites, and budget data within the prime, but the data must be edited on the linked subaward. The prime will display the data as grayed-out, meaning that it is not editable, and will show an **Edit on Subaward** button. Click this button to move directly to editing this data in the subaward.



In versions of Cayuse 424 prior to 4.2, it was possible to edit subaward data in the prime, but this is no longer possible. Subaward data is now edited within the subaward and automatically synced back into the linked prime.

Locking the Subaward

Just as [with a prime proposal](#), while you are editing a subaward it will be locked, preventing anyone else from making edits to it, and any associated proposals will also be locked, **both the prime and all other subawards linked to that prime**. This will prevent anyone else from making changes to any linked primes or subs while you are working within either the prime or its subs. This prevents conflicts between different versions of the data.

Subaward Budget Attachment Form

To view overview data for all your [linked subawards](#), navigate to the Subaward Budget Attachment Form in the prime using the form navigation list on the left. This form shows the following screen:

R&R SUBAWARD BUDGET ATTACHMENT(S) FORM					
Create Subaward Import Subaward Link Subaward Worksheet Row					
Subaward IDC Ceiling					25,000
Period	In-active	Subaward Direct Costs	Subaward Indirect Costs	Subaward Costs	Allocated to IDC base
Sample R01 Proposal (Subcontract)					
Total		219,073	109,538	328,611	25,000
University of Denver Error(3) / Warning(0)					
1	<input type="checkbox"/>	132,150	63,261	195,411	25,000
2	<input type="checkbox"/>	117,370	63,380	180,750	0
3	<input type="checkbox"/>	117,596	63,502	181,098	0
4	<input type="checkbox"/>	117,828	63,627	181,455	0
5	<input type="checkbox"/>	118,066	63,756	181,822	0
Total		603,010	317,526	920,536	25,000
Cayuse, Inc. Error(15) / Warning(0)					
Total		359,785	186,185	545,970	25,000
All Subawards					
Total		1,181,868	613,249	1,795,117	75,000

You'll also see data from any [worksheet rows](#) that have been added.

Using the plus symbol next to each subaward's name, you can expand it to see all budget periods. In the screenshot above, University of Denver has been expanded, while Cayuse, Inc. is collapsed to show just the total.

Within each subaward's area, you can use the icon to [unlink the subaward from the prime](#). Clicking the gear icon displays a dialog allowing you to select Key Persons and Performance Sites from the subaward to include in the prime.

2 Senior/Key Person Profiles

status

Weaver, Stephen - Cayuse
 Heldens, John - Cayuse

select all | unselect all

1 Project/Performance Site Location

status

University of Pittsburgh

select all | unselect all

Inactive Budget Periods

The checkboxes next to each budget period indicate whether those budget periods are active or inactive.

Period	In-active	Subaward Direct Costs
Stephen Weaver Test Proposal		
1	<input checked="" type="checkbox"/>	22,000
2	<input type="checkbox"/>	17,000
3	<input type="checkbox"/>	22,000
4	<input type="checkbox"/>	7,000
5	<input type="checkbox"/>	32,000
Total		78,000
± All Subawards		
Total		78,000

Making a budget period inactive removes it from the budget calculations that factor into the prime. To make a budget period inactive, go into the subaward by clicking on its name, and then check the **Inactive budget period** box in the upper right corner of the budget form.

The screenshot shows a web interface for a budget form. At the top, there is a dropdown menu labeled 'Budget Period 1 of 4' with a downward arrow. To its right are three small icons: a right-pointing arrow, a calendar icon, and a hand icon. Below these elements is a large white rectangular area representing the budget form. In the upper right corner of this area, there is a checkbox labeled 'Inactive budget period', which is highlighted with a red rectangular border.

Inactive Budget Periods – NIH: NIH applications must not have any inactive subaward budget periods. All subaward budget periods must be completed with the necessary information per [Guide Notice NOT-OD-15-073](#). For a list of the specific fields that must have data in them when entering an inactive subaward budget, please refer to our [Knowledge Base](#) for a detailed explanation of this issue.

See also: [Create a subaward](#), [import a subaward](#), [link an existing subaward](#), or [add worksheet rows](#).

Subaward Validations

In general, validations in subawards work the same way as [validations in an ordinary proposal](#). Subawards show validations in the Error/Warning/Infobox at the bottom of the proposal for the included forms, including the [Key Persons](#), [Performance Sites](#), and [Budget](#).

Linked subawards reflect the validation type of the linked prime proposal, while standalone subawards can [select any available validation type](#). The errors and warnings shown will reflect the validation type selected.

When a subaward is linked to a prime and there are errors in the subaward, the prime also displays a single error for each linked subaward indicating the number of issues.

Error: [Subawards][Cayuse] Subaward [University of Pittsburgh](#) has [21 errors](#).

This error is a Cayuse 424 error, but it is one that you must take seriously. If there are errors in your subaward that will

prevent successful submission, you must resolve those before submitting the proposal.

A similar Warning entry will be displayed if the subaward has warnings. Warnings highlight important items to include or issues to resolve, or situations that may cause problems when your proposal arrives at the agency, so you should attend to the warnings in the subaward and resolve them appropriately before submission.

These errors and warnings will also be highlighted when you validate the prime proposal prior to submission.

Errors or Warnings in Subproposals

There are 3 errors in the subaward proposal; there is 1 warning in the subaward proposal:

Stephen Weaver Test Proposal: 3 errors; 1 warning

If you are seeing this note when validating prior to submission, be sure to resolve the issues before proceeding to submit the proposal.

Info Tips in the Subaward

On occasion, an Info tip may appear in a subaward recommending that you review your prime proposal for the inclusion of certain information or documents. This occurs when you have entered data in the Subaward that triggers a requirement for additional documentation

in the prime. Since Cayuse 424 cannot verify the prime proposal information from the subaward, it simply presents the info tip. These info tips must be taken seriously since absence of the appropriate documentation can cause the proposal to be rejected.

Creating Subawards

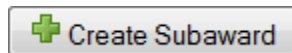
There are two ways to create subawards in Cayuse 424: one from the Proposals tab, which creates a standalone subaward that is not linked to any prime proposals, and one from within a prime proposal, which creates a subaward linked to that prime.

To facilitate creation of a subawards, it's best if there is already an [institutional profile](#) for the subcontractor and [professional profiles](#) for the subcontract Key Persons with [institutional associations](#) to the institutional profile. If you can't create an institutional profile, you should contact your local administrators to have one created. At a minimum, the profile should have an Organization Name, a DUNS number, and at least one named IDC rate with a start date established for the rate.

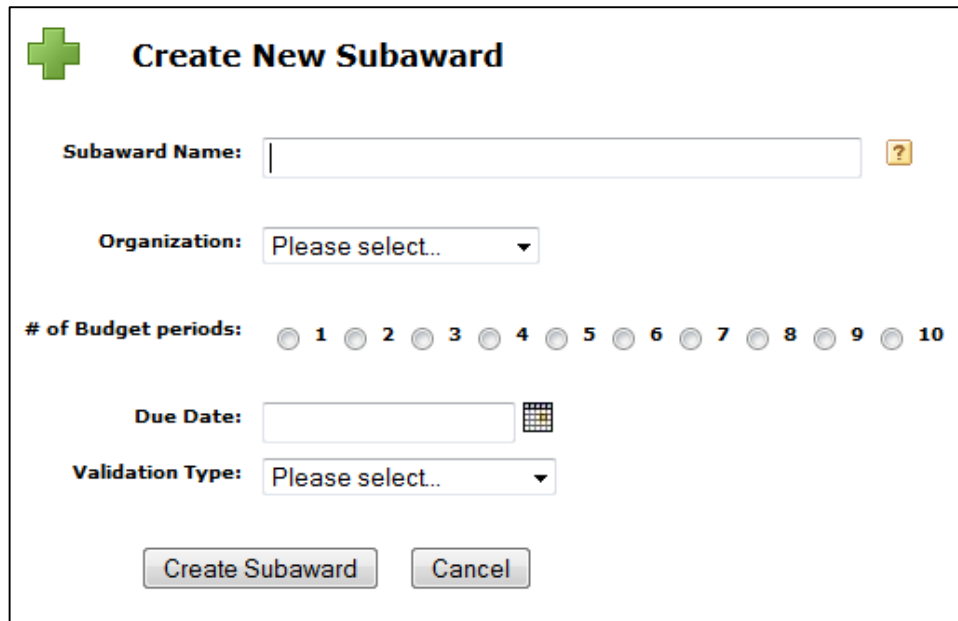
Creating a Linked Subaward

If you already have access to the prime proposal you want to link a subaward to, then it is easier to create your new subaward from within the prime, where it will be automatically linked and will inherit the prime's budget period structure and validation type.

1. Access the prime proposal.
2. Navigate to the **Subaward Budget Attachment** form.
3. Click the **Create Subaward** button.



4. This will bring you to the following dialog:


A dialog box titled "Create New Subaward" with a green plus icon. It contains the following fields: "Subaward Name:" with a text input field and a help icon; "Organization:" with a dropdown menu showing "Please select.."; "# of Budget periods:" with radio buttons for numbers 1 through 10; "Due Date:" with a text input field and a calendar icon; "Validation Type:" with a dropdown menu showing "Please select.."; and two buttons at the bottom: "Create Subaward" and "Cancel".

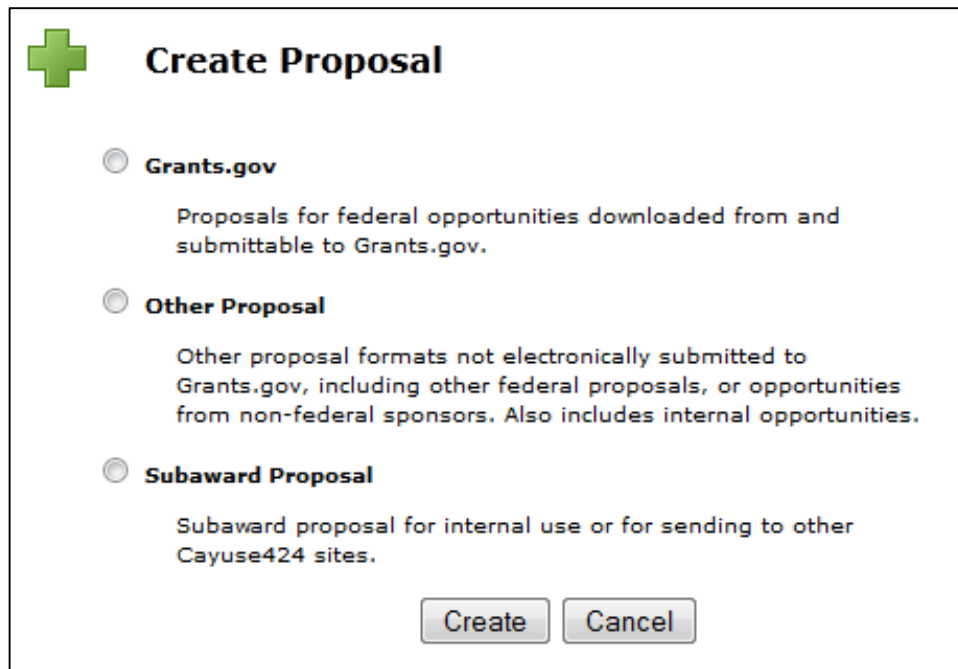
5. Enter a name for the subaward.
6. Select the applicant organization from the dropdown list. This is optional, so if your organization is not yet available as an institution, you can add it later.
7. Select the number of Budget Periods.
8. Enter a due date for the Subaward.
9. Click **Create Subaward**.

You'll be taken to the Subawards tab to edit your new subaward.

Creating a Standalone Subaward

A subaward is intended for eventual inclusion in a prime proposal, but that prime may be at another institution or may not have been created yet. In these cases, a standalone subaward can be created rather than creating a subaward from within a prime.

1. Navigate to the Proposals tab at the top of the Cayuse 424 interface.
2. Click **Create Proposal** . You'll see the initial Create Proposal dialog:

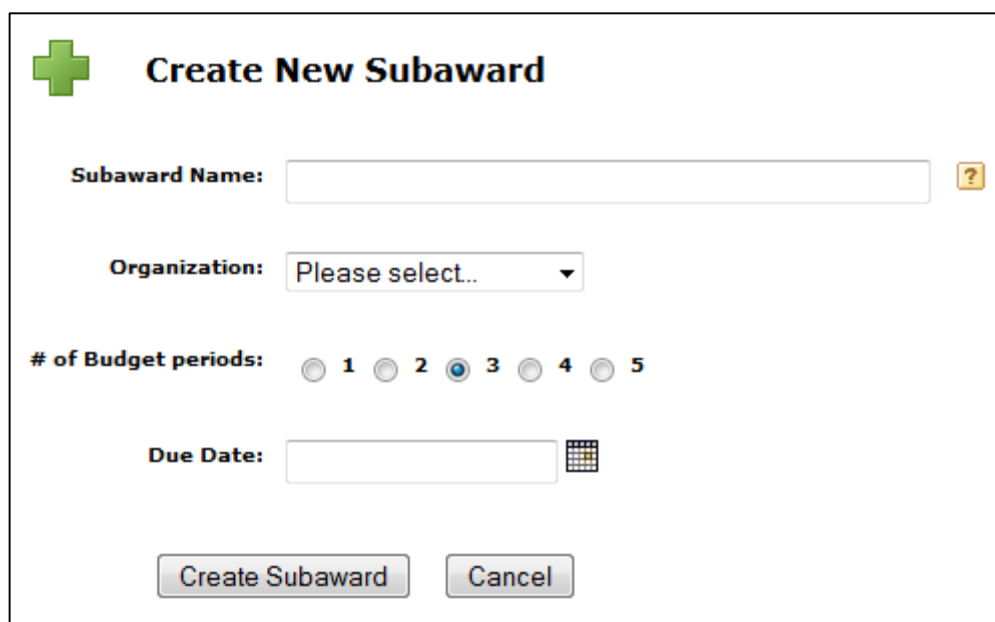


The "Create Proposal" dialog box features a green plus icon in the top left corner. The title "Create Proposal" is centered at the top. Below the title are three radio button options:

- Grants.gov**
Proposals for federal opportunities downloaded from and submittable to Grants.gov.
- Other Proposal**
Other proposal formats not electronically submitted to Grants.gov, including other federal proposals, or opportunities from non-federal sponsors. Also includes internal opportunities.
- Subaward Proposal**
Subaward proposal for internal use or for sending to other Cayuse424 sites.

At the bottom of the dialog are two buttons: "Create" and "Cancel".

3. Select Subaward Proposal and click **Create**. You'll see the Create New Subaward dialog:



The "Create New Subaward" dialog box features a green plus icon in the top left corner. The title "Create New Subaward" is centered at the top. Below the title are several input fields:

- Subaward Name:** A text input field with a yellow question mark icon to its right.
- Organization:** A dropdown menu with the text "Please select..." and a downward arrow.
- # of Budget periods:** A row of five radio buttons labeled 1, 2, 3, 4, and 5. The radio button for "3" is selected.
- Due Date:** A text input field with a calendar icon to its right.

At the bottom of the dialog are two buttons: "Create Subaward" and "Cancel".

4. Enter a name for the Subaward.

5. Select an Organization from the dropdown menu. This is not required, so if your organization is not yet available as an institution, you can add it later.
6. Select the number of Budget Periods.
7. Enter a Due Date for the Subaward.
8. Select the validation type. If you don't know it, don't worry, it can be changed later.
9. Click **Create Subaward**.

When done, you will be taken into the [subaward](#) and will be able to edit the subaward and add data.

Importing Subawards

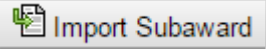
Cayuse 424 can import subaward proposals from external sources, making it easy to edit them in Cayuse using all the tools you are used to. There are three sources for importable subawards:

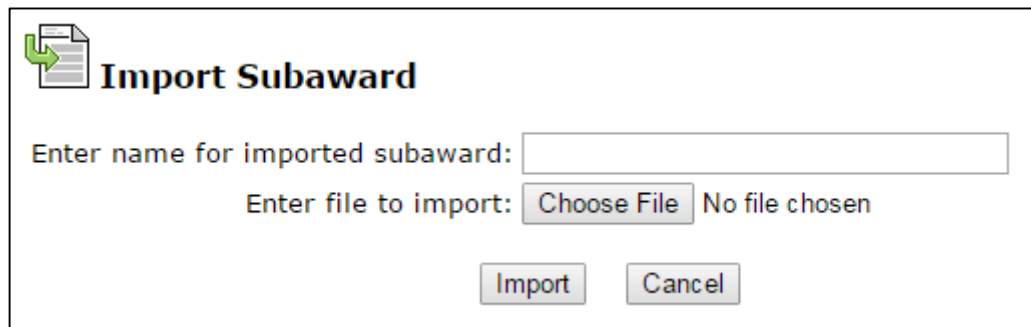
- Stand-alone subawards created within Cayuse 424 by a user at another institution.
- Subaward proposals created on [Subawards.com](#).
- Adobe subawards (extracted from the Abode application packages).

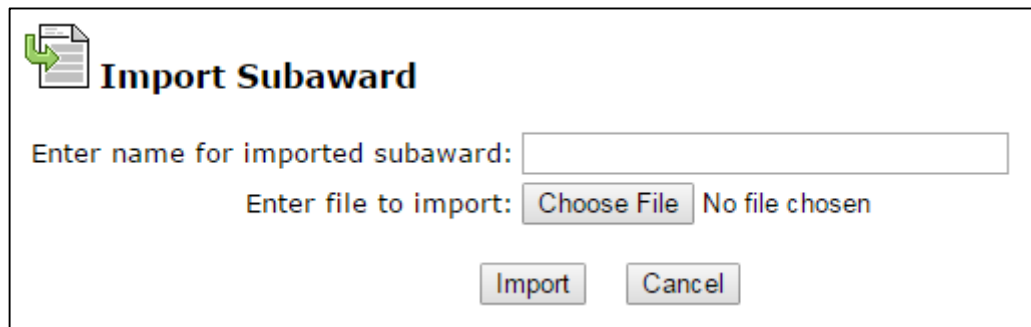
To import a subaward, your collaborator must have previously sent to you the exported file, and it must be accessible to you on either your computer's hard drive or a shared network drive.

As with [creating a subaward](#), you can import a subaward so that it is linked from the prime already, or as a standalone subaward.

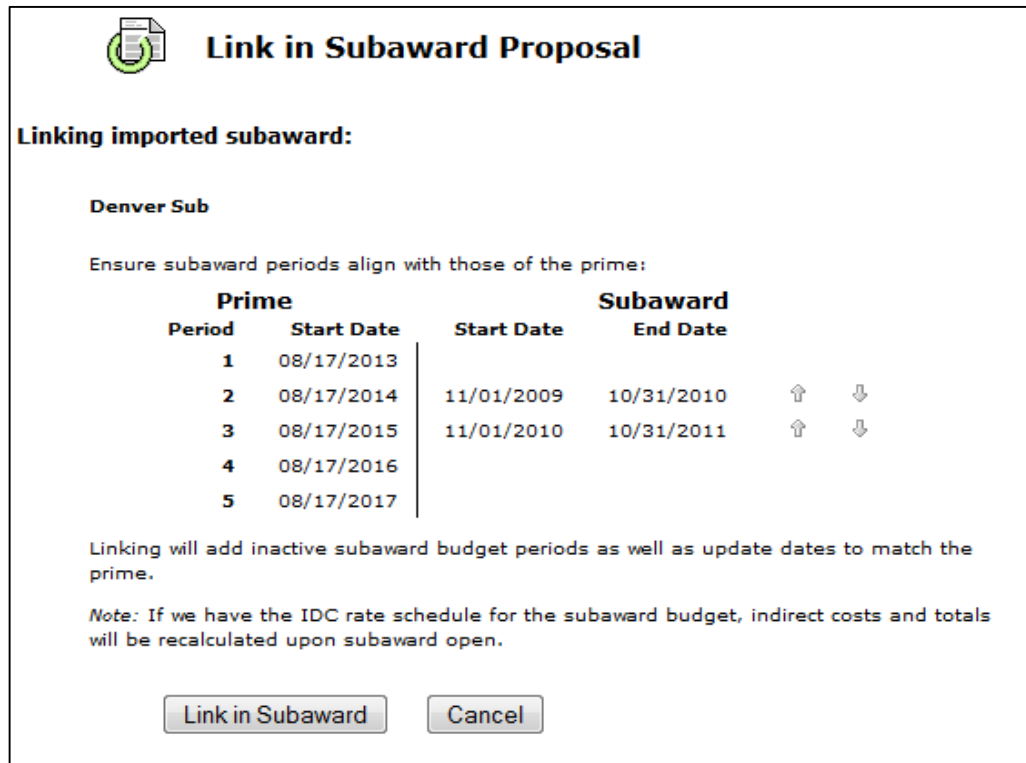
Importing a Linked Subaward

1. Navigate to the Subaward Budget Attachment Form in the left panel of the prime proposal.
2. Click the  button in the upper right.
3. Select a name for the subaward, and navigate to the location of the subaward file on your computer or shared drive.





4. Click **Import Subaward**. You'll see a screen showing the budget periods of the prime and subaward.



Link in Subaward Proposal

Linking imported subaward:

Denver Sub

Ensure subaward periods align with those of the prime:

Prime		Subaward			
Period	Start Date	Start Date	End Date		
1	08/17/2013				
2	08/17/2014	11/01/2009	10/31/2010	↑	↓
3	08/17/2015	11/01/2010	10/31/2011	↑	↓
4	08/17/2016				
5	08/17/2017				

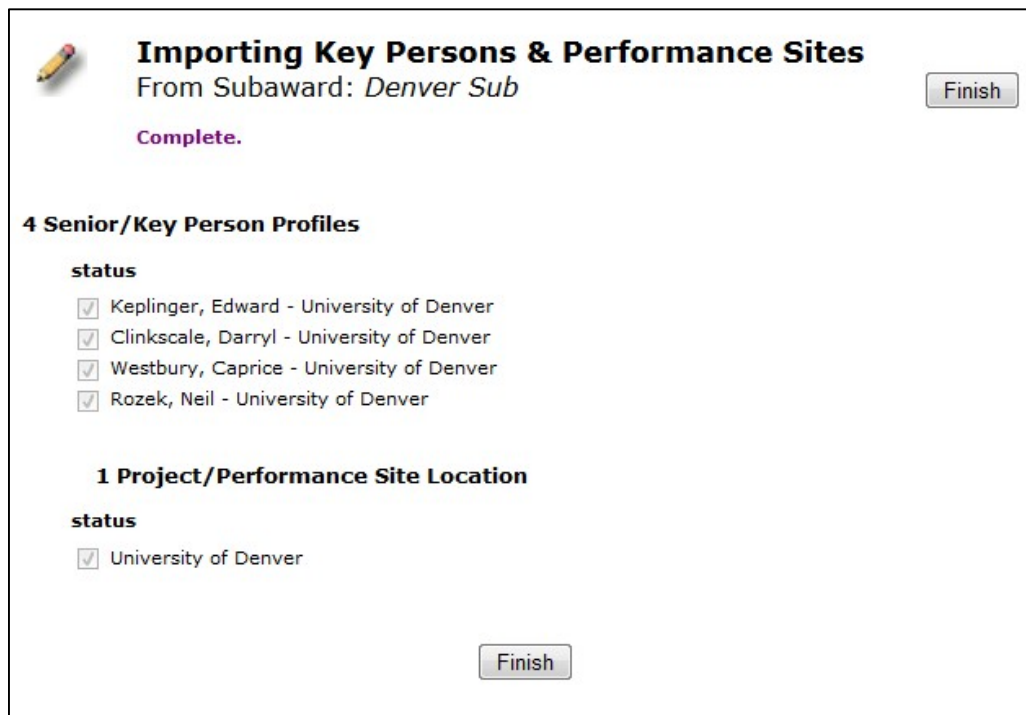
Linking will add inactive subaward budget periods as well as update dates to match the prime.

Note: If we have the IDC rate schedule for the subaward budget, indirect costs and totals will be recalculated upon subaward open.

Link in Subaward Cancel

Note: NIH no longer permits subawards that do not have the same number of budget periods as the proposal.

5. If any action is necessary to reconcile the budget periods, a message about that action will be shown; otherwise, the dialog will indicate that no action is necessary.
6. Use the arrows to align the budget periods appropriately.
7. Click **Link in Subaward** (or **Cancel** if you need to make additional modifications before import).
8. You'll see a report about Importing Key Persons and Performance Site data.



Importing Key Persons & Performance Sites
From Subaward: *Denver Sub* Finish

Complete.

4 Senior/Key Person Profiles

status

- Keplinger, Edward - University of Denver
- Clinkscale, Darryl - University of Denver
- Westbury, Caprice - University of Denver
- Rozek, Neil - University of Denver

1 Project/Performance Site Location

status


- University of Denver

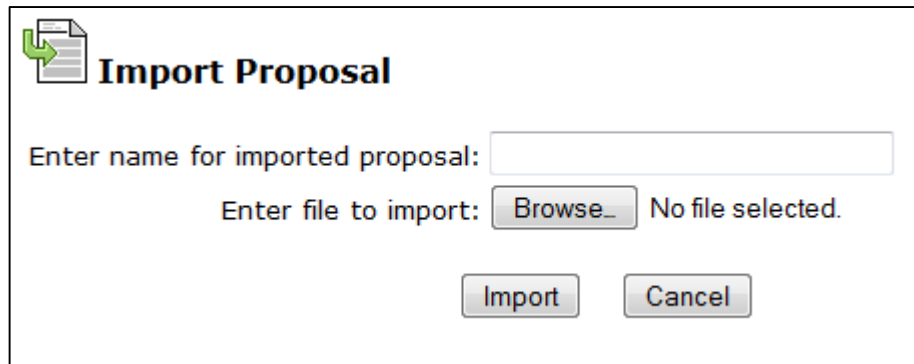
Finish

9. Click **Finish**.

The subaward proposal will be linked to the prime proposal from which you imported it, and will automatically open for editing.

Importing a Standalone Subaward

1. Go the Proposals tab.
2. Click the  **Import** button at the top of the screen. This will launch the Import Proposal dialog.
3. Type a name for the subaward into the empty text field, click **Browse**, and navigate to the location of the subaward file on your computer or shared drive:



The dialog box titled "Import Proposal" contains the following elements:

- A document icon with a green arrow pointing to the right.
- The title "Import Proposal" in bold.
- A text input field with the label "Enter name for imported proposal:".
- A label "Enter file to import:" followed by a "Browse..." button and the text "No file selected."
- Two buttons at the bottom: "Import" and "Cancel".

4. Click **Import**.

The subaward will open for editing, and you'll be able to see it in the Proposals List as you would any other proposal.


If you have imported an Adobe subaward and are wondering where the Budget Justification is, see the Knowledge Base article entitled [I imported an Adobe subaward and I don't see the Budget Justification. Where did it go?](#)

Exporting Subawards

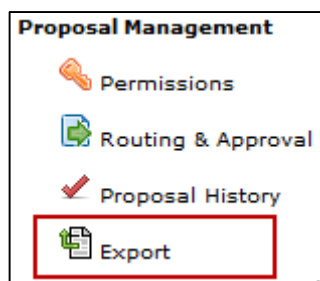
If you are working on a subaward proposal that is for another institution that uses Cayuse 424, you can complete the subaward within 424 and export it for use by the other institution. The export process creates a *.cayuse* file containing the subaward data, which can be imported by the other customer.

Only standalone subawards can be exported. Linked subawards cannot be exported, since a linked subaward is intended for submission with its associated prime.

To export a subaward:

1. [Open the subaward proposal](#) from the Proposals List.
2. Select the  button in the upper right gray bar, or in the lower left Proposal Management area.





3. On the Subaward Export screen, give the subaward file an informative name.

A screenshot of the "Subaward Export" screen. At the top left is a document icon with a green arrow. The title "Subaward Export" is in bold. Below the title is a text input field with the placeholder text "Enter a name for the exported file:". The field contains the text "Test2 .cayuse". Below the input field is a button labeled "Export Subaward". At the bottom left is a button labeled "Validate Subaward" followed by the text "(Run final validation checks - recommended.)".

4. Click **Validate Subaward** to ensure that there are no errors before exporting.
5. Click **Export Subaward**.
6. You'll be prompted to open or save the .cayuse file. Save the file to a convenient location on your computer.

You won't be able to open the file yourself. It's a special file format that can only be opened by Cayuse 424. After saving the file, just send it directly to your collaborating institution so that they can [import the file as a subaward proposal](#).

Linking Subawards

The process of attaching a subaward to a prime proposal is called linking. When a subaward is linked to a prime proposal, it will be submitted with that proposal, and will also display with that proposal in the Proposals List. A proposal with attached subawards will be indicated by a + or - beside the Prime proposal. A subaward can only be linked to one prime proposal. When the prime proposal is open, the subaward [can be opened from the Subawards tab](#) and its information is included on the [Subaward Budget Attachment Form](#).

Information Transfer From Linked Subawards to the Prime

When a subaward is linked to a prime proposal, the following data transfer occurs:

- Any Key Persons or Performance Sites on a linked subaward proposal are automatically copied into the Prime.
- The subaward's total costs (direct + indirect) for each of the budget periods are added into Item F.5 (Subawards/Consortium/Contractual Costs) in the R&R budget.
- The subaward Indirect Cost is added to the Direct Cost to obtain the Total Cost for each budget period.
- The prime's Indirect Costs on the subaward will be added to the Indirect Base for one of the named rates that you

specify. This appears on page 3 of the Detailed Budget in an extra field called **Allocated IDC Base** designed for this purpose. A sample is shown below.

F. Other Direct Costs	Indirect Cost Type	Funds Requested (\$)
1. Materials and Supplies	excluded	
2. Publication Costs	excluded	
3. Consultant Services	excluded	
4. ADP/Computer Services	excluded	
5. Subawards/Consortium/Contractual Costs	89,541
> Allocated IDC Base	excluded	39,875
6. Equipment or Facility Rental/User Fees	excluded	
7. Alterations and Renovations	excluded	
8.	excluded	
9.	excluded	
10.	excluded	
Total Other Direct Costs		89,541

Note that you can use this Allocated IDC Base field even if you do not use the Subaward Budget page.

Subaward Key Persons and Performance Sites

All Key Persons and Performance Sites on a subaward proposal that is linked to a Cayuse 424 prime proposal are automatically copied into the Prime, but you can choose to exclude them by unchecking the **Include in Prime** checkbox(es) in the upper right of the subaward's Key Persons and Performance Sites forms. To add them back, return to the subaward and check the box again.

Permissions for Linked Subawards

Permissions for linked subawards are governed by the prime. Since the subaward cannot be directly edited without opening the Prime, everyone who had write access on the subaward will no longer have that permission, and those with write access on the prime will be able to open and edit the subaward.

Validation Type

Linked subawards have the same validation type as their linked prime proposal.

Linking to a Prime


If you have imported a subaward directly into the Proposals List, or otherwise developed it within Cayuse without linking to a prime, you will need to link it to a prime in order for its data to attach to that proposal.

First, open the intended prime proposal, and go to the Subaward Budget Attachment Form within that proposal. At the top of that form you'll should see the following options:

 **R&R SUBAWARD BUDGET ATTACHMENT(S) FORM**

Click the **Link Subaward** button. You will see the following dialog:



Link in Subaward Proposal

[Show All](#)

Showing Recent Subawards

Select a subaward to link:

TEST

Test2

TestExport

Test - is it FNF

Ensure subaward periods align with those of the prime:

Prime		Subaward	
Period	Start Date	Start Date	End Date
1	08/17/2013	01/15/2014	01/14/2015
2	08/17/2014	01/15/2015	01/14/2016
3	08/17/2015	01/15/2016	01/14/2017
4	08/17/2016	01/15/2017	01/14/2018
5	08/17/2017	01/15/2018	01/14/2019

Linking will update subaward dates to match the prime.

Note: If we have the IDC rate schedule for the subaward budget, indirect costs and totals will be recalculated upon subaward open.


Select the subaward from the list of all unlinked subawards currently existing in your instance of the Cayuse 424 system.

When you select the subaward you want to link, the budget periods of the Prime and the Subaward will be compared below it, allowing you to see how they match up. If these budget periods do not perfectly align, those within the subaward will be automatically matched to the prime when you click **Link in Subaward**.

If your subaward has fewer budget periods than your prime, you will be given the option to use the up and down arrows to adjust the alignment of the budget periods.

Prime		Subaward		
Period	Start Date	Start Date	End Date	
1	06/07/2010			
2	06/07/2011	08/17/2010	08/16/2011	↑ ↓
3	06/07/2012	08/17/2011	08/16/2012	↑ ↓
4	06/07/2013			
5	06/07/2014			

After you select the subaward and match up the budget periods, click **Link in Subaward**. The Key Persons and Performance Sites on the subaward will be included in the Prime:



Importing Key Persons & Performance Sites

From Subaward: *Denver Sub*

Complete.

4 Senior/Key Person Profiles

status

- Keplinger, Edward - University of Denver
- Clinkscale, Darryl - University of Denver
- Westbury, Caprice - University of Denver
- Rozek, Neil - University of Denver

1 Project/Performance Site Location

status

- University of Denver

Click **Finish** and your subaward will be linked to your prime proposal.

Synching Subs and Primes

If you change budget, key person, and/or performance site data in one of the linked subawards, Cayuse 424 will automatically update that data in the prime as well.

Subawards with Empty Budget Periods: Cayuse 424 expects all Subawards linked to a Prime to have the same number of budget periods as the Prime (and the same dates). When you [import a linked subaward](#) or [link a subaward to a prime](#), it will bring up a dialog asking you to match up the sub's budget periods with those of the prime.

Select a subaward to link:

TEST
Test2
Test Export
Test - is it FNF

Ensure subaward periods align with those of the prime:

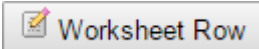
Prime		Subaward		
Period	Start Date	Start Date	End Date	
1	09/01/2013	09/01/2013	08/31/2014	↓
2	09/01/2014	09/01/2014	08/31/2015	↓
3	09/01/2015			
4	09/01/2016	09/01/2016	08/31/2017	↑ ↓
5	09/01/2017			

Linking will add inactive subaward budget periods as well as update dates to match the prime.


Any empty periods will be marked as inactive, and the others synced according to your assignment, so there is no need to fill in any "blank" or "dummy" periods in your subaward.

Note: NIH no longer permits subawards that do not have the same number of budget periods as the proposal.

Using Subaward Worksheet Rows: The table on the Subaward Budget Attachment form also operates as a **Subaward Worksheet**, to which you can add a row or rows without a detailed Subaward behind it. You can then fill in subaward numbers manually.

To add a new Worksheet Row, click the  button at the top of the Subaward Budget Attachment Form and scroll down and click the plus sign to the left to fill in cost data for each budget period (the total is a [calculated field](#) and can't be filled out directly).

The worksheet row will be listed on the Subaward Budget Attachment Form in a similar manner to a true subaward, but because it doesn't correspond to a separate subaward proposal, there is no link to click, and the unlink button is replaced by a delete button:


Period	In-active	Subaward Direct Costs	Subaward Indirect Costs	Subaward Costs	Allocated to IDC base
testNumber2 Error(13) / Warning(8)					
1	<input type="checkbox"/>	7,109	0	7,109	7,109
2	<input type="checkbox"/>	7,322	0	7,322	7,322
3	<input type="checkbox"/>	7,542	0	7,542	7,542
4	<input type="checkbox"/>	7,768	0	7,768	3,027
5	<input checked="" type="checkbox"/>				0
Total		29,741	0	29,741	25,000
Subcontract					
Total		10,000		10,000	10,000
All Subawards					
Total		39,741	0	39,741	35,000


Worksheet rows are useful for what-if scenarios, placeholders, and flowing numbers into modular budgets. Proposals using modular budgets cannot also submit detailed subaward data, and by using a worksheet row, the appropriate budget data will flow from the table into the modular budget, where the Subaward IDCs can be excluded for determining the direct cost modules.

You can also use worksheet rows to attach additional subaward data when you're reached the limit of allowed subaward budget attachments. Depending on the form that is provided with your opportunity, you may reach this limit at 10 or 30 subawards. If your proposal exceeds this limit, you can create worksheet rows for the additional subawards so that you can calculate costs correctly. In this case, you would also attach the subaward details as part of the Budget Justification.

Warning: A Worksheet Row is not a substitute for a Subaward! Neither Grants.gov nor NIH can extract information implied in a worksheet row. For instance, NIH needs to know what the Indirect Costs are for the subcontract in order to check your proposal against funding limits, and they can only get this information if you fill out a subcontract.

Unlinking from a Prime

To unlink a subaward from its prime proposal, open the prime and go to the Subaward Budget Attachment form. To the right of each subaward in the list you will see the  icon. Click that to be taken to the following screen:



Unlink Subaward?

Unlink Subaward
The Subaward proposal "**another name**" will be unlinked from the current Prime.

Unlink and Delete Subaward
The Subaward proposal "**another name**" will be unlinked from the current Prime and completely deleted.

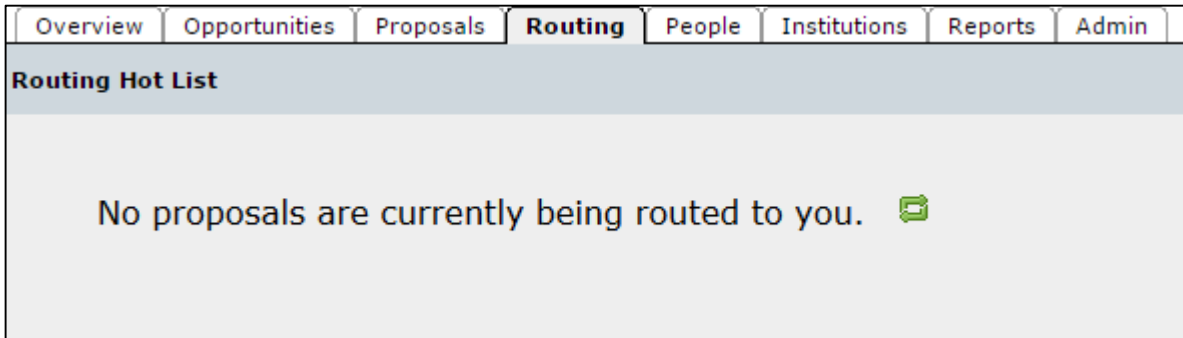
Here you can choose to simply unlink the subaward, returning it to the Proposals List for later use, or to instead Unlink and Delete it all at once. If you delete the Subaward, no other user will be able to see or use it.

After unlinking, all Budget Data, Key Persons, and Performance Sites from the subaward will be removed from the Prime proposal.

Routing

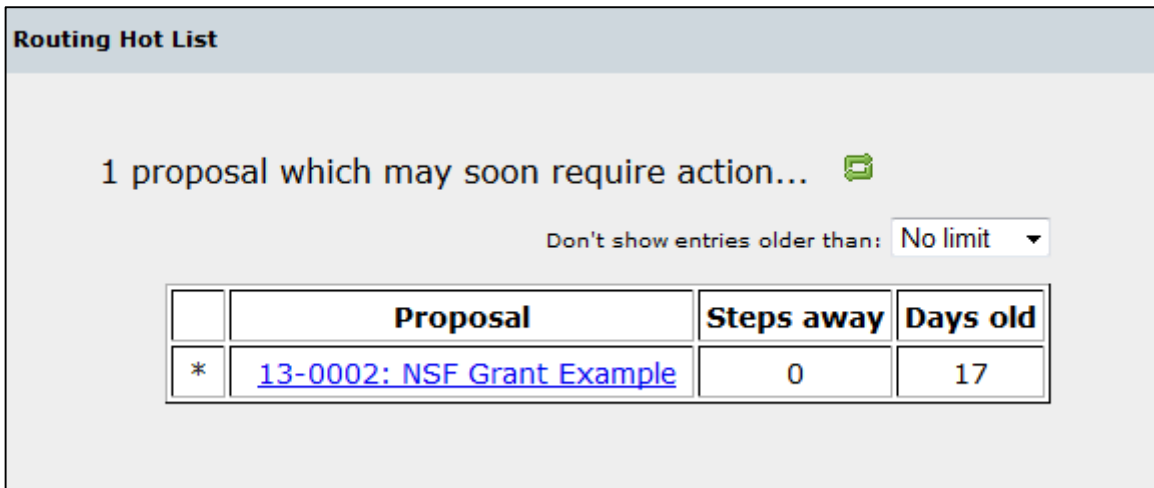
Cayuse 424 supports the electronic routing from proposals from the PI to the final approver. If routing is active in your Cayuse 424 application, you will see the Routing tab in the list of tabs across the top. Clicking on this tab will show you a list of proposals that may need your review in the near future.

If the list is empty, no proposals are being routed to you.




The screenshot shows a navigation bar with tabs: Overview, Opportunities, Proposals, **Routing**, People, Institutions, Reports, and Admin. Below the tabs is a header for "Routing Hot List". The main content area displays the message: "No proposals are currently being routed to you." followed by a small green icon.

If the list contains proposals, these proposals list you as part of the "routing chain", the list of people who must approve the proposal before it can be submitted. The proposal is listed with an indication of how many "steps away" it is, which shows how many people have to approve it before it will reach you. If the number is zero, you are the next approver. It also shows how long the proposal has been awaiting your action.



The screenshot shows the "Routing Hot List" header. Below the header, it says "1 proposal which may soon require action..." followed by a small green icon. Below this is a filter option: "Don't show entries older than: No limit" with a dropdown arrow. Below the filter is a table with the following data:

	Proposal	Steps away	Days old
*	13-0002: NSF Grant Example	0	17

When you click on a proposal to review it, you will be taken to the proposal. After review, click the  button. This takes you to a screen where you can approve the proposal by clicking on a box next to your name:



Routing & Approval ?

Routing Chain  **Edit Chain?**

Begin

Heldens, John - Univ of Cayuse: Medicine

 McNulty, Patricia - Univ of Cayuse: Office of Sponsored Research

End


 An AOR is on the routing chain, but has not yet approved this proposal. The proposal will not be submittable until an AOR has approved the proposal.


You can also retract the proposal's approval and "send it back" to the appropriate person in the chain for revisions by unchecking the box next to that person's name. Any later approvals will also be retracted, as each of those people must re-review the proposal after any necessary changes are made.

At any time during routing, the PI or other "first approver" can also "recall" the proposal by unchecking the box next to his or her name. This resets the entire routing process.


The Routing Process

Once a proposal is completely prepared, the PI (or other first approver) can begin the routing process. If the routing chain needs to be edited before routing can begin, see [Editing Routing Chains](#).

1. Click the  button to view the proposal's routing chain.
2. Click the box next to their name.



Routing & Approval ?

Routing Chain  **Edit Chain?**

Begin

Heldens, John - Univ of Cayuse: Medicine

 McNulty, Patricia - Univ of Cayuse: Office of Sponsored Research

End

 An AOR is on the routing chain, but has not yet approved this proposal. The proposal will not be submittable until an AOR has approved the proposal.

This causes several events to take place:

Routing History				
username	person	type	date/time	comments
dwest	Osterberg, Joe - CayU: Anatomy	Approve	2016-04-14 11:12	appprroooovvvved

- The routing event is logged in the Routing History as well as in the [Proposal History](#).
- Email is sent to the next person on the routing chain that an approval action has taken place and their attention is required.
- An entry is added to each routing chain member's [Routing Hot List](#) listing the proposal, the number of steps before they need to approve, and how long it has been waiting.
- The PI's access rights to the proposal forms are curtailed. Attachments, such as the Research Plan, can still be modified and added, but no changes can be made to the form data or the budget.
- The next reviewer in the routing chain, if they did not have full access to the proposal, is granted full access. This access only lasts until the reviewer accepts or rejects the proposal. (Delegate(s) of the next reviewer will also have this access.)
- Other reviewers also have enhanced access while the proposal appears in their Routing Hot List.

Each approver takes the approval action in turn until the proposal reaches the final reviewer, generally the AOR.

AOR Approval

Once the AOR has determined the forms are ready for submission to Grants.gov, they can approve the proposal for submission. After the AOR approves the proposal, all chain members (including the PI) are notified by email.

In some organizations only the AORs submit proposals. In this case, the AORs can proceed with submission of the approved proposal. Other users would find the Submit button disabled and would not be able to submit. If your system is configured to let others submit after AOR approval, then those other users would be able to submit the proposal

after the AOR's approval.

Rejecting a Proposal

As described briefly under [Routing](#), there are two types of rejection actions:

- **Retract:** This is performed by any reviewer by unchecking the box next to any name that has already approved the proposal. In this manner, the proposal is sent back all or part of the way for an overhaul or quick fix. It could be tweaked and re-approved and be back on track.
- **Recall:** This is performed by the PI by unchecking the box next to his/her name. This cancels the whole approval process and the proposal is back to the start.

When a reviewer retracts the proposal, returning it to another person in the routing chain, the person who then needs to re-approve the proposal will receive an email notification letting them know they need to review and re-approve. If the reviewer retracts their own approval, no email notification will be sent, since they must take the next action.


Routing Non-Federal Proposals

Routing non-federal proposals is not fundamentally different from routing federal proposals, except that the electronic submission authority of the AOR is not critical. The rest of the process is the same: the routing chain can be created and edited, and the proposal can be routed from approver to approver as each one checks the box next to their name, until the final approval is granted.

Editing Routing Chains

The list of people who must approve a proposal before it can be submitted is the "routing chain" for that proposal. The routing chain can be edited both before and during routing.

Viewing the Chain

To see the routing chain, click the  button in the proposal.



The screenshot shows a window titled "Routing & Approval" with a help icon. Below the title is the heading "Routing Chain" and a button labeled "Edit Chain?". The routing chain is listed as follows:

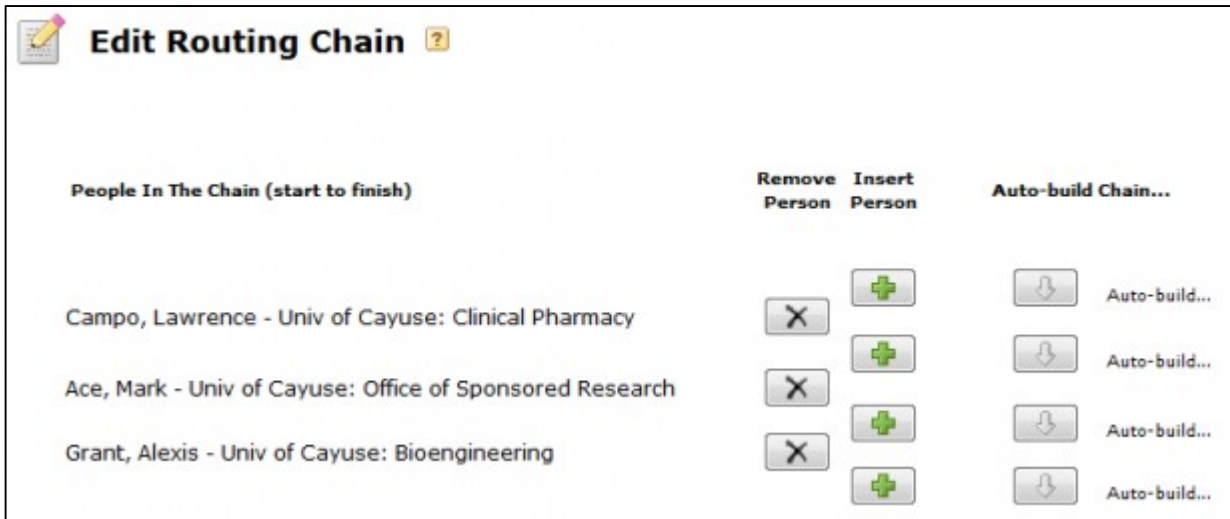
- Begin**
- Heldens, John - Univ of Cayuse: Medicine
-  McNulty, Patricia - Univ of Cayuse: Office of Sponsored Research
- End**

A yellow warning banner at the bottom states: "An AOR is on the routing chain, but has not yet approved this proposal. The proposal will not be submittable until an AOR has approved the proposal."

The chain is shown from the beginning (first person in the list). The routing chain generally begins with the Principal Investigator by default, although at some institutions it may be built from the proposal's creator.

Editing the Chain

Each proposal has its own routing chain that can be modified at any time before final approval. To edit a routing chain, click the **Edit Chain?** button shown above the routing chain. You'll see the following dialog:



The 'Edit Routing Chain' dialog box features a title bar with a pencil icon and a question mark. Below the title, there are three columns of controls: 'Remove Person' (with an 'X' icon), 'Insert Person' (with a green plus icon), and 'Auto-build Chain...' (with a download icon). The main area contains a list of three people in the chain, each with a corresponding 'Remove Person' and 'Insert Person' button. The list items are: 'Campo, Lawrence - Univ of Cayuse: Clinical Pharmacy', 'Ace, Mark - Univ of Cayuse: Office of Sponsored Research', and 'Grant, Alexis - Univ of Cayuse: Bioengineering'.

People In The Chain (start to finish)	Remove Person	Insert Person	Auto-build Chain...
Campo, Lawrence - Univ of Cayuse: Clinical Pharmacy	X	+	Auto-build...
Ace, Mark - Univ of Cayuse: Office of Sponsored Research	X	+	Auto-build...
Grant, Alexis - Univ of Cayuse: Bioengineering	X	+	Auto-build...

To add a person to the routing chain, click the green plus button at the appropriate location in the chain. This will bring up the Add to Routing Chain dialog.



The 'Add to Routing Chain' dialog box has a green plus icon in the title bar. It includes a search input field with a 'Search' button and a 'Show All' link. Below this is a 'Recently Added' section with a list of names and departments. A legend indicates that an asterisk (*) denotes AOR. At the bottom, there is a 'Comments:' field and two buttons: 'Add To Chain' and 'Cancel'.

Recently Added

- Wakeling, David - CayU: Electrical Engineering
- Weaver, Stephen - CayU: Oral Maxillofacial Surgery
- * Hoff, Andrew - CayU: Office of Sponsored Research
- Spears, Michael - CayU: Family Health Care Nursing
- Ace, Mark - CayU: Office of Sponsored Research
- * McBane, John - CayU: Office of Sponsored Research
- * McNulty, Patricia - CayU: Office of Sponsored Research

[* = AOR]

Comments:

Add To Chain

Cancel

To find the person you want, either select from the list, or use the Search box or the Show All function to see the full list. To select someone in this dialog, they must have a [Professional Profile](#) that is linked to their user account. The profile or associated user account must also have a contact email address, or you will not be able to add the person to the chain. Routing information is provided through email.

You can add someone other than the PI or proposal creator to the beginning of the chain, although this would be unusual. To remove someone, click the X button next to their name.

If some people have already approved, it will not be possible to modify that part of the chain. The approvals would have to be retracted in order to add an additional person.

Because the later part of the routing chain can be modified at any point, it is possible to build a routing chain simply by each approver knowing the next person who should approve and adding them to the chain, until the proposal eventually reaches the AOR for final approval. The Cayuse 424 routing system is therefore highly flexible and easily customizable.

Adding an AOR

When routing is active, electronic submission authority generally resides with Authorized Organizational Representatives (AORs), and proposal preparers must seek approval from an AOR to electronically submit their proposals, so an AOR should be listed on every routing chain.

Depending on your institution's configuration, certain users (such as Admins) may be able to submit the proposal either before or after approval by the AOR. The Routing and Approval page indicates whether an AOR is included on the chain and whether they have approved:

[;f Routing & Approval iii

Routing Chain | + X } ... | Edit Chain?

D Helms, John - Univ of Cayuse: Medicine

f: D MCNulty, Patricia - Univ of Cayuse: Office of Sponsored Research

...

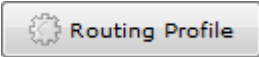
An AOR is on the routing chain, but has not yet approved this proposal. The proposal will not be submittable until an AOR has approved the proposal.

Creating Routing Profiles

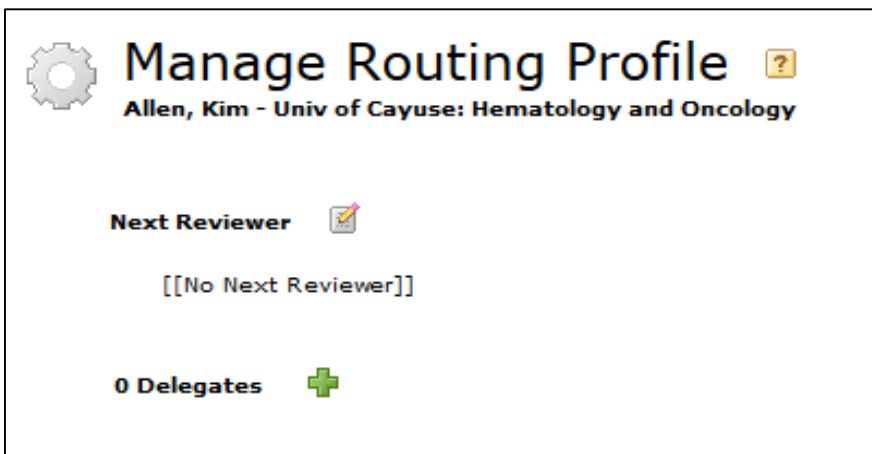
Although each Cayuse 424 proposal has its own routing chain that can be modified during the approval process, if you have a standard routing process, it may be convenient to set up Routing Profiles so that routing chains can be auto-built at the time that the proposal is created.

Setting up a Routing Profile

Routing profiles are stored in each person's Professional Profile. In order to set up routing profiles, each user who is part of the chain must have their user account linked to their Professional Profile, and the profile or linked user account must contain an email address and be available to those who need to add it to a chain for routing purposes.

To access the Routing Profile, click the  button at the bottom left of the Professional Profile. The Professional Profile can be reached by navigating to the People tab and either searching for a person, or selecting a person from the list of recently viewed people. People can also be sorted by institution using the dropdown that is below the search box.

The routing profile allows the designation of a Next Reviewer for the person as well as a Delegate. A Delegate is someone who has the authority to approve the proposal in case the reviewer is unavailable. A Next Reviewer is the person who should appear next on the routing chain.

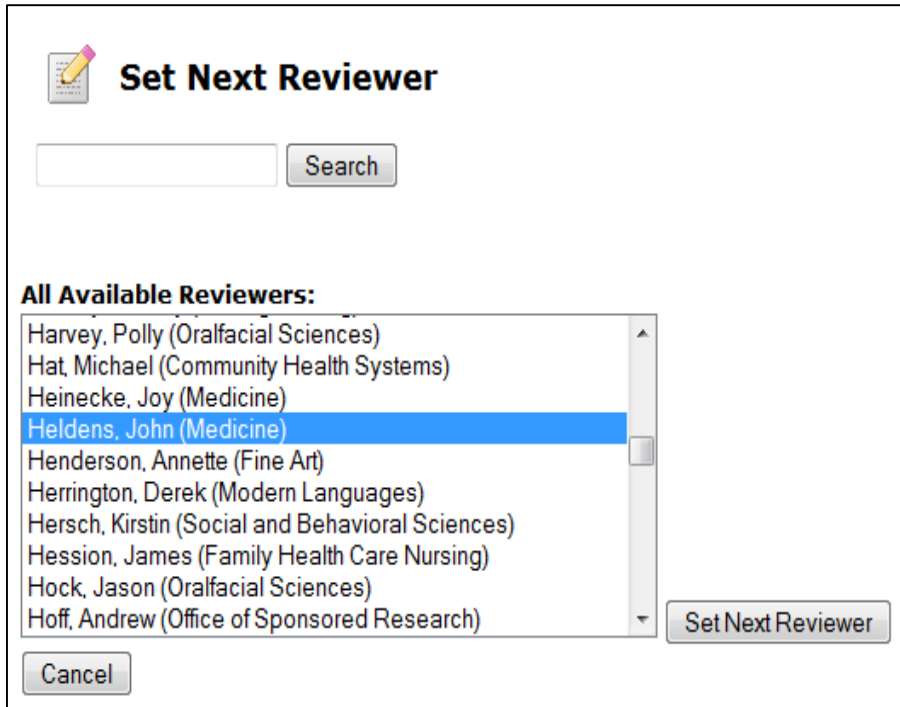


Assigning a Next Reviewer

Depending on who the user is, their next reviewer will differ. If the organization uses a routing hierarchy such as:

1. PI > Department Chair > Dean > AOR > submit

Then the Next Reviewer for all PIs in a Department would be their Department Chair. To assign a Next Reviewer, click the pencil icon. You'll see the following dialog:



Set Next Reviewer

Search

All Available Reviewers:

- Harvey, Polly (Oralfacial Sciences)
- Hat, Michael (Community Health Systems)
- Heinecke, Joy (Medicine)
- Heldens, John (Medicine)
- Henderson, Annette (Fine Art)
- Herrington, Derek (Modern Languages)
- Hersch, Kirstin (Social and Behavioral Sciences)
- Hession, James (Family Health Care Nursing)
- Hock, Jason (Oralfacial Sciences)
- Hoff, Andrew (Office of Sponsored Research)

Cancel Set Next Reviewer

If you don't see a list of reviewers to select from, use the Search box or click the **Show All** link. When you've selected the person you want, click **Set Next Reviewer**.

If you can't find the person you want here, and you know that you can see their profile, it may be that adding them as a next reviewer for you would create a circular routing relationship. That is, they are already the next reviewer for you or someone prior to you in the routing hierarchy. The next reviewer relationships cannot be circular, since routing chains are intended to be linear.

Assigning Delegates

Inevitably, there are times when a reviewer is not available. If you have assigned the reviewer a Delegate, the Delegates can act in their stead. Delegates can see routed proposals their Reviewer sees and get the same notifications as the reviewer does, both by email and within Cayuse

424. Note that delegation is not transitive. A delegate of your delegate has no permissions to act for you. They only have permissions to act on the behalf of the person they are directly assigned as a delegate of.

To add a delegate, click the green plus button. You'll see the following dialog:

Add Routing Delegates

All Available Delegates:
 (Select multiple delegates by holding down the <Ctrl> key while selecting.)


- Bergen, Vivien (Clinical Pharmacy)
- Berger, Jason (Philosophy)
- Berry, Christopher (Hematology and Oncology)**
- Berry, Henry (Clinical Pharmacy)
- Bishop, Tamika (Fine Art)
- Bjelland, Kat (Institute for Health and Aging)
- blah, blah
- Bradbury, John (Mechanical and Aerospace)
- Braithwaite, Stuart (Neurology)
- Breeze, Brian (Pharmaceutical Chemistry)


As above, use the Search box or click the **Show All** link to see all available delegates. You can select multiple delegates simultaneously by holding down the <Ctrl> key (or <Command> for Macs). Then click **Add Delegates**.


After you complete the process, the Next Reviewer and Delegates will be displayed for the Profile.


Manage Routing Profile

Allen, Kim - Univ of Cayuse: Hematology and Oncology

Next Reviewer 

Heldens, John (Medicine) 



1 Delegate 












1. Berry, Christopher - Hematology and Oncology 

Click **Close** to exit.

Once your routing profiles are set up, the routing chain can be built automatically when the proposal is created. The chain can also be auto- built later from any user in the chain, using the **Auto-build chain** button for that user in the Edit Routing

Chain area.

 **Edit Routing Chain** 

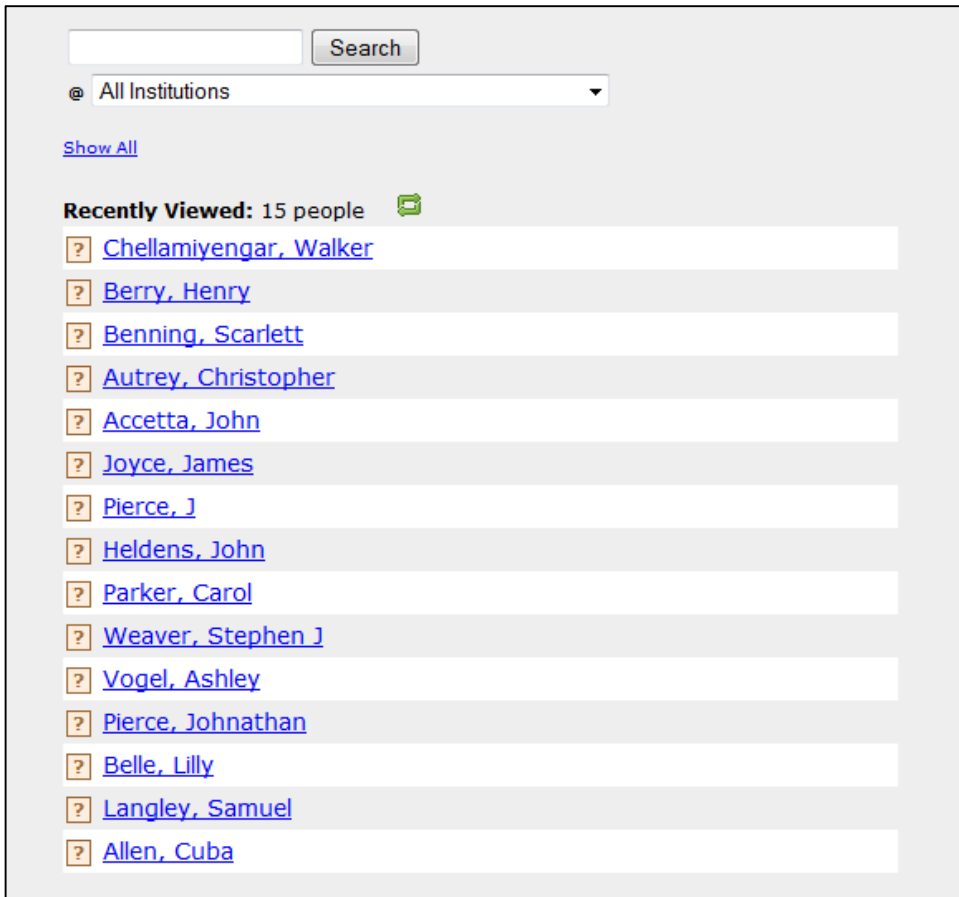
People In The Chain (start to finish)	Remove Person	Insert Person	Auto-build Chain...
Campo, Lawrence - Univ of Cayuse: Clinical Pharmacy			 Auto-build...
Ace, Mark - Univ of Cayuse: Office of Sponsored Research			 Auto-build...
Grant, Alexis - Univ of Cayuse: Bioengineering			 Auto-build...
			 Auto-build...

This means that even if the whole chain cannot be built at the time of creation, part or all of it can be built later by editing the routing chain within the proposal

People

The People tab in Cayuse 424 represents the professional information of people in the system: their professional profiles. Professional profiles contain the information that funding agencies require from Principal Investigators, Key Persons, Other Significant Contributors and Authorized Representatives. This information is added to the appropriate forms in a proposal when the person is [autofilled](#) into the proposal.


By default, the People tab shows profiles you have viewed recently. Depending on your institutional configuration, you may be able to see everyone in the system, or just a few people. Most commonly, all users can see and search for all professional profiles.



Search

@ All Institutions

[Show All](#)

Recently Viewed: 15 people 

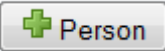
- [Chellamiyengar, Walker](#)
- [Berry, Henry](#)
- [Benning, Scarlett](#)
- [Autrey, Christopher](#)
- [Accetta, John](#)
- [Joyce, James](#)
- [Pierce, J](#)
- [Heldens, John](#)
- [Parker, Carol](#)
- [Weaver, Stephen J](#)
- [Vogel, Ashley](#)
- [Pierce, Johnathan](#)
- [Belle, Lilly](#)
- [Langley, Samuel](#)
- [Allen, Cuba](#)

To search for a profile, enter the person's name into the search box at the top of the screen. You can enter the full name, first or last name, or the first few letters of the first or last name. To limit the search to a particular institution, if you know which institution the person is associated with, select one in the second box. Institution short names are included in the drop-down to help distinguish between institutions that have similar long names.

Note on People Search

When searching for people, you can enter more than one name into the search box, separated by a space. Unlike when searching for an institution, this is an OR search, and the results will include people whose first or last names begin with either of the name fragments you entered. The People search only searches for names that start with the search string. For example, searching for "Jane Cooper" will also return results for "Mark Coopering" and "Janeine Jones", but not "MaryJane Reynolds".

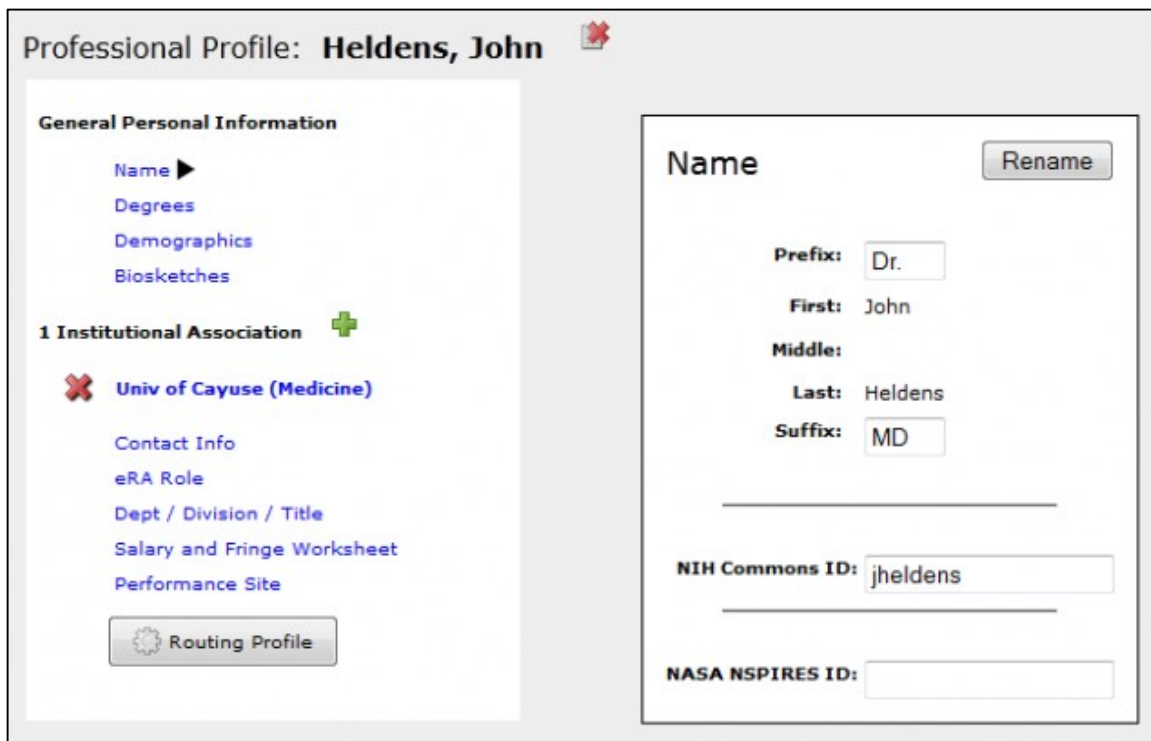
To show all profiles you have access to, click **Show All**. (If you can see many profiles, this may take a few moments.) You can navigate to the right part of the longer list by clicking the first letter of the person's last name.

To create a new professional profile, click the  button.

To visit a profile, click on the person's name. If you have permission to read the profile, it will open to show you the person's information.

General Personal Information

Professional profiles have two parts. The first part is the General Personal Information, which includes basic proposal-related personal information: name, degrees, demographics, biosketches (stored as PDF or word-processing documents).



Professional Profile: **Heldens, John**

General Personal Information

- Name
- Degrees
- Demographics
- Biosketches

1 Institutional Association

- Univ of Cayuse (Medicine)

- Contact Info
- eRA Role
- Dept / Division / Title
- Salary and Fringe Worksheet
- Performance Site

Routing Profile

Name Rename

Prefix: Dr.

First: John

Middle:

Last: Heldens

Suffix: MD

NIH Commons ID: jheldens

NASA NSPIRES ID:


A name is required to identify the profile. The other information is optional, but can be very helpful for submitting certain types of proposals. For example, an NIH Commons ID would be useful if you frequently submit NIH proposals. The more information you enter here, the more fields will be auto-filled during proposal creation. This will make the proposal creation process faster and easier.

Name

If the Profile name is incorrect or has changed, you can use the **Rename** button shown to the upper right of the name.

Degrees

There are two fields for degrees, one following the NIH format and one following the NSF format. For NIH proposals, separate each degree by a comma. Use the drop-down menu to select an NSF Degree Type.

Degrees 	
NIH Degrees (comma separated, max of 3):	BS, MS, PhD
Senior/Key Person Degree Type:	PhD
Senior/Key Person Degree Year:	1969
NSF Degree Type:	ScD: Doctor of Science
NSF Degree Year:	1969

Demographics

This section contains demographic information frequently required on NSF proposals.


Demographics	
Gender:	Do Not Wish to Provide
Race (Check all that apply):	
<input type="checkbox"/>	American Indian or Alaska Native
<input type="checkbox"/>	Asian
<input type="checkbox"/>	Black or African American
<input type="checkbox"/>	Native Hawaiian or Other Pacific Islander
<input checked="" type="checkbox"/>	White
<input type="checkbox"/>	Do Not Wish to Provide
Ethnicity:	Do Not Wish To Provide
Citizenship:	Do Not Wish to Provide
Disabilty Status (Check all that apply):	
<input type="checkbox"/>	Hearing
<input type="checkbox"/>	Visual
<input type="checkbox"/>	Mobility/Orthopedic Impairment
<input type="checkbox"/>	Other
<input checked="" type="checkbox"/>	None
<input type="checkbox"/>	Do Not Wish to Provide

Biosketches

Biosketches can be uploaded and stored in Cayuse 424, making them easily accessible to you and your collaborators as you assemble proposals. You can add multiple biosketches within a profile, and you can store both the source file (usually word processor format) and the final PDF file in Cayuse 424.

Biosketches 			
Name	pdf	src	Delete
DBowie Bio	yes 	yes 	

When the source file is uploaded, the **blue yes link** is active in the src column. To add a biosketch, follow these steps:

1. Click the  button next to Biosketches. Cayuse 424 will prompt you for a name for the biosketch.

Enter a name for the new biographical sketch.

2. Enter a good identifying name and click **Next**, and you'll see the dialog below.


Enter the name of the PDF file to upload No file chosen


- 3.
4. Browse to the PDF file on your computer and click **Next**.
5. If you want to also upload the source file, in the next window, browse to the file on your computer.
6. Click **Done**.

To delete a biosketch from a professional profile, click the  icon on the far right of the row in the table.

Institutional Associations

The second part of a professional profile is an institutional association: a link between a person and the institution that employs them. This part of the profile holds all the information about the person that is specific to their position at the institution: their contact information, position and role, salary and benefits information, and their performance site.

1 Institutional Association 

 **CayU (Bioengineering)**

[Contact Info](#)


[eRA Role](#)

[Dept / Division / Title](#)

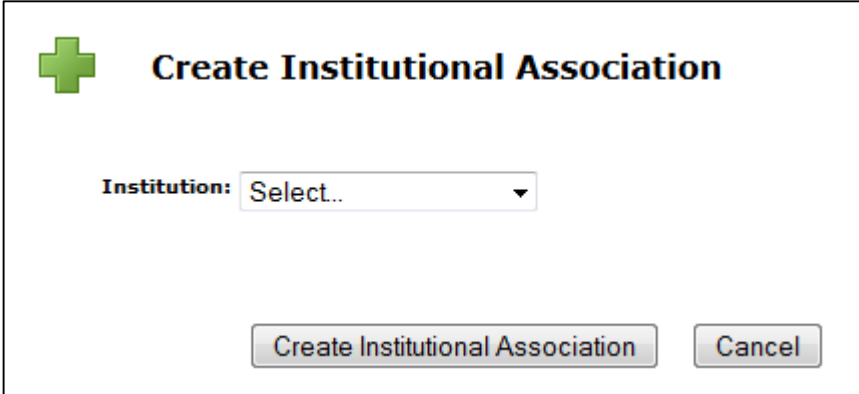
[Salary and Fringe Worksheet](#)

[Performance Site](#)

If the person for whom you are creating or updating a professional profile does not have an institutional association, or

you need to add a new one, click the  next to the count of their institutional associations in the left sidebar, as shown above.

You'll see the Create Institutional Association dialog:



In the Institution dropdown, select the desired institution. All Cayuse 424 applications have at least one institution that profiles can be associated with: the home institution of the organization. Normally you will want to select this institution for associations. The short name for the institution is included in the drop-down to help distinguish between institutions that have similar long names.

However, if the person you are adding or editing is external to your organization, you may not see their institution here. The institutions you see in this list are those [institutional profiles](#) that are available to you. If you don't see the desired institution in the list, you will need to find out if it exists in your system. If it does not, you [may be able to create one](#), but in most cases you will need to ask your System Administrator to create one for you.

Contact Info

CayU (Bioengineering)
Contact Info

Street 1:

Street 2:

City:

State/Province:

Zip/Postal Code:

County:

Country:

Phone:

Fax:

Email:

Contact Info includes the mailing address of the person at the institution as well as phone and email contact details. The information in the Contact Info screen will be auto-filled into a proposal when the person is selected as a PI or a Key Person.

eRA Role

CayU (Bioengineering)
eRA Role

Role(s): Principal Investigator
 Assistant
 Administrative Official
 Signing Official / "AOR"
 Payee

The role you select here will determine where the person is included in lists or search results to be added to a proposal.

- **Principal Investigator:** The person will be included when selecting a PI or Key Person.
- **Administrative Official:** The person will be included when selecting a Person to be Contacted In Matters Involving this Application.
- **Signing Official / "AOR":** The person will be included when selecting an Authorized Organizational Representative.
- **Payee:** The person will be included when selecting a Payee for Environmental Protection Agency (EPA) proposals.

The Assistant option is available for informational purposes but does not affect autofill inclusion.

Dept/Division/Title

Test Foreign Institution

Department / Division / Title

[Select Division and Department] ▼

	Code	Title
Department:	<input type="text"/>	<input type="text"/>
Division:	<input type="text"/>	<input type="text"/>
Position/title:	<input type="text"/>	

Enter the person's department, division (if any) and position title. If the institution the profile is associated with has Organizational Units, you can select these from the dropdown menu above the fields in order to fill in the department and division quickly and easily. Unit names are limited to 30 characters. In some cases you may be required to select units from the list in order to enforce consistent unit names. Position or title is always entered by hand.

Salary and Fringe Worksheet

See [Salary and Fringe](#).

Performance Site

Information for the person's physical location. When the person is autofilled onto a proposal as the PI, this site will appear in the Performance Sites list, and if they are given another Key Person role, the site can be added easy using Performance Site autofill.

The Performance Site can be autofilled in the professional profile by clicking the **Fill from Contact/Org Info** button.

Routing Profile

See [Creating Routing Profiles](#).

Salary and Fringe

Salary and fringe benefits information is stored in the Salary and Fringe Worksheet section of a professional profile's institutional association. The section is called a Worksheet because you can enter and edit all the information so that it is accessible later for computations in proposals.

Test Institution

Salary / Appointment type

Employee ID:

Appt Type:

	Months	Salary
Calendar:	<input type="text" value="12.0"/>	<input type="text" value="70000"/>
Academic:	<input type="text"/>	<input type="text"/>
Summer:	<input type="text"/>	<input type="text"/>

Fringe Worksheet

Category	Entry (\$)	Factor (%)
Faulty	<input type="text"/>	<input type="text" value="20.00"/> <input type="button" value="X"/>

Base Fringe Rate:

Fringe Rate Total:

The Employee ID field is optional and may be used to link Cayuse 424 data with other systems.

Appointment Type and Salary

The Salary / Appointment Type section includes both the type of appointment the person has — Academic/Summer or Calendar appointment— and the salary information.


Salary information is optional, and each Cayuse 424 customer makes its own decision about whether to provide salary information in the professional profile. Including this information makes autofilling a person into a proposal very quick because it means that Key Person budget computations can be completed automatically. Otherwise, the salary information must be entered by hand in each proposal for calculations to occur.






Even if salary information is not included in the profile, the appointment type information should be included, indicating the number of months the person has on their Calendar or Academic/Summer appointment. If including salary, list salary in the field corresponding to the appointment type. Changing an existing appointment type in a proposal can create errors in the proposal.


Fringe Benefits

If the [institution](#) the profile is associated with has a base fringe rate assigned, that rate will show here:

Fringe Worksheet

 Import Institutional Rates

	Category	Entry (\$)	Factor (%)	
	FT Staff 		25.0	
	Special 	50.00	0.10	

 New Row

Base Fringe Rate: 30.00%


Fringe Rate Total: 55.10%

If additional fringe rates have been set in the institutional profile, these rates can be imported by clicking **Import Institutional Rates** and selecting from the list. You can import as many categories as you need.


4 Institutional Fringe Rates

Selected Institutional Rates apply to this Professional Profile.

Apply	Fringe Category	Entry	Rate
<input type="checkbox"/>	FT Faculty		43.0
<input type="checkbox"/>	Adjunct Faculty		26.0
<input type="checkbox"/>	FT Staff		47.0
<input type="checkbox"/>	PT Staff		26.2



Fringe rates can be entered as percentages or as dollars. If there are dollar amounts entered in the Fringe Worksheet, those amounts will be added into the Fringe Rate Total if the salary is entered (as shown above with the "Special" rate). If percentages are used, then the Fringe Rate Total can be calculated based on the entered percentages, without the base salary.

If the person has unique fringe rate needs, click  New Row to add a local row and fill in a percentage or dollar amount. To change an imported fringe rate, click the small down arrow next to the fringe rate name.

Category	
FT Faculty	43.0%
Adjunct Faculty	26.0%
FT Staff	47.0%
PT Staff	26.2%


The [institutional fringe rate list](#) will appear and you can select a different rate.

If you don't see the rate you need, and you have access to the [institutional profile](#), you can add the rate in the institutional profile (follow the link above for instructions). If you don't have access to the profile, you can add the rate by hand for the individual, request access to the profile, or ask an Admin to add it for you.

Controlling Access



Because professional profiles are most useful in proposal completion when all Cayuse 424 users can view them and autofill the information into proposals, the application is almost always set up to allow this.

However, some information in profiles, such as salary, may be sensitive information. Depending on institutional policy, such information may be omitted from the profile, meaning it will have to be entered by hand into each proposal after the profile is autofilled; or the sensitive information may be included, but profile visibility limited to the creator of the profile and the Admins.

To see who has access to a profile, click the  in the upper right corner of the main screen to bring up the Permissions screen.

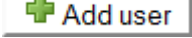
The Permissions screen only shows permissions that have been explicitly assigned. It does not show whether Admins or all users automatically have the ability to see and autofill the profile.

In the Permissions screen shown below, the user 'mspears' has been explicitly assigned permissions to the Professional Profile, and consequently can read and autofill this particular profile. The profile's creator, 'jheldens,' can edit the profile, add people who can access it or change their permissions, and delete the profile.

	List	Read	Write	Autofill	Delete	Change Permissions	Add User/Group	Remove User/Group
 Spears, Michael (mspears)	<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"/>
 Heldens, John (jheldens)	<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"/>

Profiles created manually grant full permissions to the user who created them, while profiles created through the bulk load process grant full permissions to the user they are linked to. If, after creation, the user linked to the profile does not have permissions to edit it, but institutional policy allows them to manage their own profile, they may be added to the permissions manually.

Adding a User

1. Click the  button.
2. Select a user from the list, or search for another user to add by name or username. You can use **Show All** to show all users. The user is added to the profile's permissions. If the user is grayed out, they have already been added to the permissions.

Add Security Principal close

[Show All](#)

Select *Users* below to provide access to this Professional Profile.

Recently Used: 5 principals

Type	User	Profile Name
U	rpeters	Peters, Ryan
U	kbaker	Baker, Kim
U	ktobin	Tobin, Katherine
U	sweaver	Weaver, Stephen
U	callen	Allen, Cuba

- 3.
4. Close the selection window by clicking the Close link or button.

Editing Permissions

Once you've added someone to the permissions, you can change their permissions (if you are allowed to do so) by checking and unchecking the boxes to give them the right level of access.

The following table describes the permissions associated with Professional Profiles.

Permission	Description
List	Users with this permission will see the profile in lists, but cannot view or modify the details of the profile.
Read	Users with this permission can see all the data the profile, but cannot modify the data.
Write	Users with this permission can modify all data within the profile.
Autofill	Users with this permission can autofill data from the profile into grant proposals. This permission allows users to use the profile as intended: to quickly complete proposals.
Delete	Users with this permission can delete the profile.
Change Permissions	Users with this permission can change the permissions associated with the profile.
Add User/Group	Users with this permission can add additional users and assign them appropriate permissions to the profile.
Remove User/Group	Users with this permission can remove users from the profile's permissions.

Avoiding Duplicates

Professional profiles are identified by name, so if you are checking to see if a person has a profile, you can search by all or part of their name to find their profile.

If you are not able to find a person's profile, you may be tempted to create one for them. However, depending on your institutional settings, you may or may not be able to see all the profiles in the system, so their profile might already exist, but not be visible to you.

To address this, Cayuse 424 checks for potential conflicts when you enter a name to create a new professional profile. If the name chosen for a new profile closely resembles the name of an existing profile, Cayuse 424 displays a warning that there is already a profile with a similar name.

**Profile Name Conflict**

The name '**Mena Temple**' may match the existing profile below:

Name	Organization	Department
Mena Temple	University of Cayuse	Psychiatry

If you need access to a profile, please contact the department admin.

If this is the person you are looking for, you should contact your administrator to request access to the existing profile.

You should always treat this warning seriously. Creating duplicate profiles for a single individual can lead to confusion, the retention of incorrect information, and issues with accessing proposals and profiles.

In some cases, two different people may have similar names, which would be a legitimate reason to proceed with creating a profile with a duplicate name. Most commonly, this action requires an Admin to complete, but in some cases, any user may be able to override the warning. If you can override this warning, the dialog will show a **Create Anyway** button.

**Profile Name Conflict**

The name '**John Heldens**' may match the existing profile below:


Name	Organization	Department
John Heldens	University of Cayuse	Medicine

If you need access to a profile, please contact the department admin.

If the person shown is not the person you are trying to create a profile for, you can click **Create Anyway** and proceed with

creating the new profile. If you don't see this button, you will need to contact your administrator and ask them to create the profile for you.

Deleting Profiles

If you see a  icon next to the name when viewing or editing a Professional Profile, then you can delete the profile by clicking on the icon.

If the Profile is still linked to a user account, then you will see the following warning. This is a sign that the Profile may still be in use. You should only proceed if you have verified that this Profile is incorrect and should not be in use.



If a profile is linked to the wrong user account, the linkage can be changed by a System Administrator.

When a profile is deleted, it is not immediately purged from the system. The System Administrator user can restore a deleted profile if you have made a mistake in deletion.

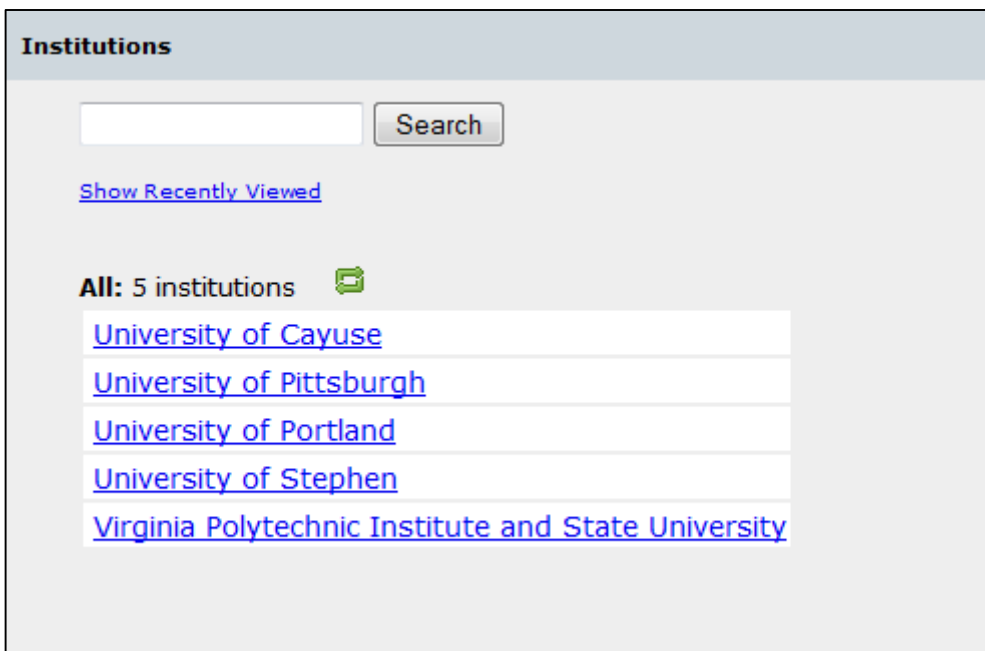
Profiles should not be deleted simply because they contain incorrect information. The information can be edited and updated. The profile can even be [renamed](#) if needed.

Institutions

Institutions in Cayuse 424 hold institutional information relevant to proposals much in the way that professional profiles hold personal information relevant to proposals. This includes the institution's name, address, DUNS, EIN, and other identifying information.

Each Cayuse 424 application has at least one institutional profile, the home institution of the organization. Some organizations also create Institutional Profiles for personnel who are not affiliated with the home institution and for subaward organizations. For most organizations, the local Administrators create and manage the Institutional Profiles, but users are able to see them and autofill their data in proposals.

When you view the Institutions tab, you can see and search for the available institutions.



The screenshot shows a web interface titled "Institutions". At the top, there is a search bar with a "Search" button. Below the search bar is a link that says "Show Recently Viewed". Underneath that, it displays "All: 5 institutions" with a small green icon. A list of five institutions is shown, each as a blue hyperlink:

- [University of Cayuse](#)
- [University of Pittsburgh](#)
- [University of Portland](#)
- [University of Stephen](#)
- [Virginia Polytechnic Institute and State University](#)

As in other areas, you can show all the institutions or just those recently viewed, or search for the one you want.

Note on Institution Search: When searching for an institution, you can enter character strings from any part of the institution's name, in any order of their occurrence. Entering additional search parameters (separated by spaces) will narrow down the results.

For example, searching for "hampton city" would return "City College of Binghampton" but not "Hampton University".

After clicking on the name of an institution, you'll see the data, but won't be able to edit it.

Institutional Profile: University of Cayuse

Address ▶

- Assurances and Certifications
- Fringe Rates & Benefits
- Indirect Costs
- Escalation Rates
- Organizational Units

Institutional Address


Institution name:	University of Cayuse
Institution short name:	CayU
Street 1:	10700 SW Beaverton-Hillsdale Hw
Street 2:	Bldg. III, Ste. 654
City:	Beaverton
State/Province:	Oregon
Zip/Postal Code:	97005-4742
Mailstop:	
County:	Washington
Country:	United States of America
URL:	www.cayuse.com

You can check the information to make sure it's correct. Click one of the links on the left to see the different kinds of information.

When you are [creating a proposal](#) or [creating a subaward](#), you can select existing institutions that are available for autofill in the **Organization** field. The proposal will be affiliated with this institution, and its data will be autofilled into the proposal. That includes the contact information, escalation rates, and available indirect cost rates, among other information.

If you're having trouble with indirect cost types not showing in your subaward, see [our FAQ on this topic](#).

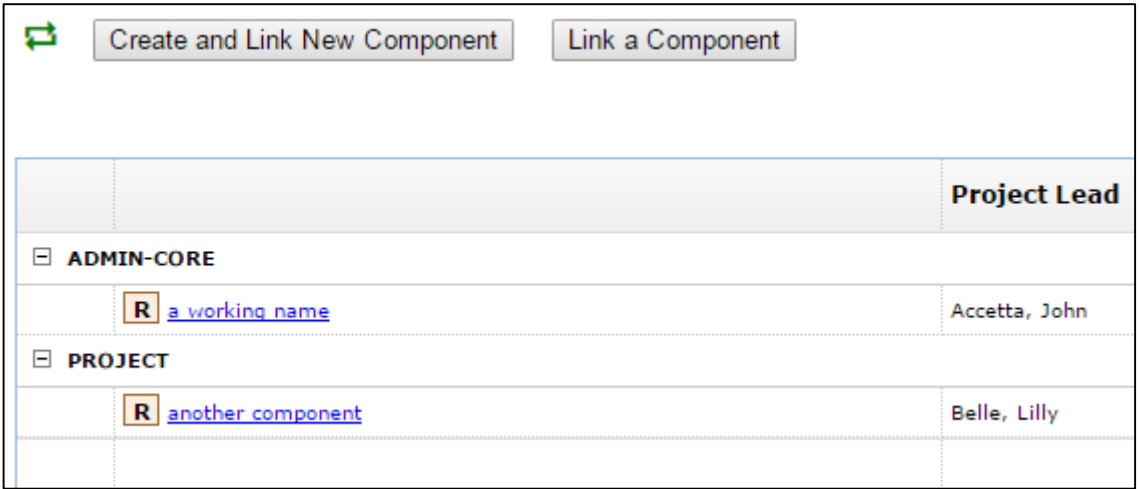
Some of the information in institutional profiles is primarily used when creating an [institutional association](#) in a professional profile. After you select an affiliation for the profile, you can select from its Organizational Units to assign a department and division and its assigned fringe rates to establish a fringe rate for the profile.

If the institution you need is not listed here and you don't see the  **Institution** button to the right in the gray bar, you do not have permission to create the institution yourself. Contact a local administrator to create the institution for you.

If you do see this button, or if your local administrator creates the profile but then allows you to add information to it, see [Setting Up Institutional Profiles](#) for more information on filling out an institutional profile correctly.

Multi-Project Proposals

With the release of Cayuse 424 v6.0, Cayuse 424 begins support for multi-project (complex) proposals. Within Cayuse 424, Multi-Project Components are treated like individual proposals. On Multi-Project Opportunities, these components can be linked together to an 'Overall' component on a Components Attachment Page. The entire proposal can then be submitted to Grants.gov through Cayuse 424.



When beginning work with a Multi-Project Opportunity, [Opportunity Information](#) may be the first place to visit. [Creating a Multi-Project Proposal](#) may also be a useful place to start. Once you've created the Proposal, being able to [navigate](#) the new fields will be key.

Within a Multi-Project Proposal, you can [Create and Link New Components](#) as necessary. You'll also be able to [Link Existing Components](#), [Import Components](#) from Other Cayuse 424 Institutions, and [Export Components](#) for use by other Cayuse 424 Customers.

In Cayuse 424, each component can be treated as a separate Proposal, even when they are linked to an Overall Component. This means:

- Each component can have its own routing chain, however, currently the individual components do not have to complete routing to be submittable. Only the Overall component must have routing completed. To learn more about Routing in Cayuse 424, see our [Routing](#) page.
- Permissions flow down to each individual component. If you have access to the Overall Proposal, you will have access to all linked Components and any subawards linked to them. You can also grant access to specific components as necessary. To learn more about Permissions in Cayuse 424, see our [Permissions](#) page.
- Individual components can be edited simultaneously, even if another linked component has been locked by a different user. For example, the Overall component can be edited by one user while another user is editing another linked component. To learn more about Opening and Locking Proposals, see our [Opening a Proposal](#) page.
- Multi-Project Proposals have to be Copied/Transformed one component at a time. Selecting Copy/Transform on the Overall Component **will not** Copy/Transform the entire Proposal, just the Overall Component. To learn more about the Copy/Transform process, see our [Copying and Transforming](#) page.

Multi-Project Opportunity Information

When looking at the Opportunity Information pertaining to a Multi-Project (Complex) Grant, most of the information will be identical to other [Opportunity Information](#) found within Cayuse 424. However, you will notice that the bottom section is now titled 'Components' and contains additional information.

Instructions: [oppPA-40-001-cfda93.396-cidCOM](#)
PDF: [oppPA-40-001-cfda93.396-cidCOM](#)

Components

Supported	Mandatory	Component Name
*	*	Overall
*		Admin-Core
*		Core
*		Project

This opportunity is *fully* supported by **Cayuse424**.

In this section, you will see a list of each component associated to this Opportunity. Beside it, there will be information on whether it is supported, and whether it is mandatory.

Moving your mouse cursor above the component's name will provide additional information about the forms that are included with the associated component.

Components

Supported	Mandatory	Component Name
*	*	Overall
*		Core
*		Project
*		Compl

Formset:
http://apply.grants.gov/forms/PHS398_ResearchPlan_2_0-V2.0
http://apply.grants.gov/forms/RR_KeyPersonExpanded_2_0-V2.0
http://apply.grants.gov/forms/PHS398_CoverPageSupplement_2_0-V2.0
http://apply.grants.gov/forms/PerformanceSite_2_0-V2.0
http://apply.grants.gov/forms/RR_OtherProjectInfo_1_3-V1.3
http://apply.grants.gov/forms/RR_SF424_2_0-V2.0

This opportunity is *fully* supported by **Cayuse424**.

This information can be useful in determining what information you may need prior to starting work on a Multi-Project Proposal.

Creating a Multi-Project Proposal

You can find multi-project opportunities in the Opportunities list. Multi-Project Opportunities have children in the Opportunities list, unlike other opportunities.

		RFA-DP-15-999	Cancer Biology Research
		Special-Int-Proj	Cancer Biology Research
		DP-15-999	SIP Test CDC
		Special-Int-Proj	SIP Test CDC

Creating a Multi-Project (Complex) Proposal in Cayuse 424 is very similar to [creating](#) any other Proposal in Cayuse 424. The only difference is the selection of a 'Component Type' during creation.

Create Grants.gov Proposal

Multi-Project Opportunity: PA-40-001 (Overall)

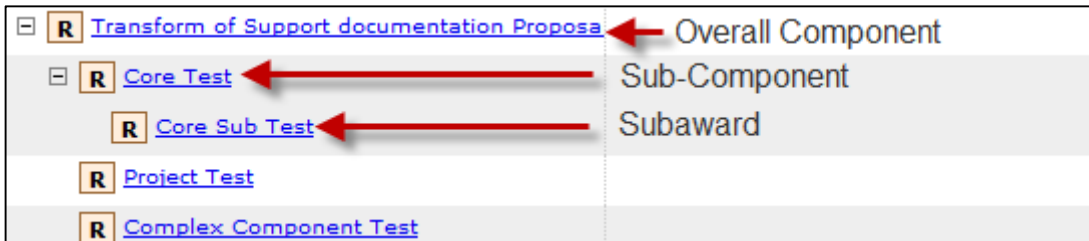
Component Type: Overall Admin-Core Core Project

Proposal Name:

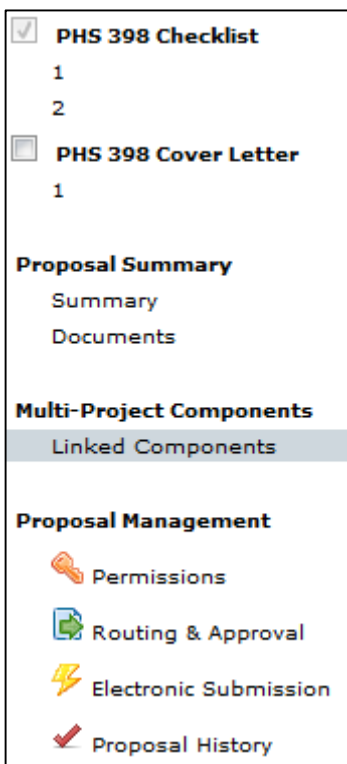
The 'Overall' component represents a Proposal that other components can be linked to. It is generally used to summarize the rest of the MP application and identifies the PD/PI and the applicant Organization for the entire MP proposal. The other components will be created as separate proposals that can be linked to an Overall component at any time. These components can also be [exported](#) and sent to other Cayuse 424 customers.

Navigating a Multi-Project Proposal

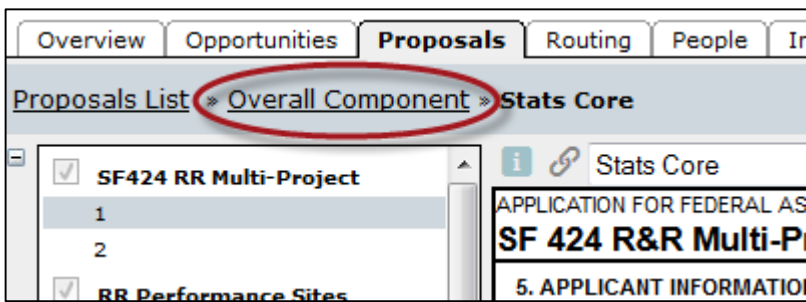
Navigating a Multi-Project (Complex) Proposal is much like [navigating](#) any other Proposal in Cayuse 424. On the Proposals List, you'll be able to expand or collapse Multi-Project Proposals by clicking the + or - button beside the Proposal, respectively. If you have a subaward attached to one of your components, you will also be able to expand that in the same fashion.



When you enter an Overall component, you will notice that there is a new section on the left side of the screen entitled 'Multi-Project Components'.



Selecting 'Linked Components' will take you to a new page where you can [Create New Components](#) and [Link Existing Components](#). Clicking on the name of a component will take you into that component. From a component, go back to the Overall Component by selecting **Overall Component** in the [breadcrumb](#) trail at the top left.



You may notice that some forms appear abridged and/or uneditable on subcomponents. In accordance with Multi-Project guidelines, some sections may only be editable on the 'Overall' section, and some may only be editable on specific Components. Be sure to look closely at the guidelines provided by the Agency.

On the 'Linked Components' page, you will see some information about each component you have associated to your Multi-Project Proposal. This includes the associated Lead Principal Investigator, as well some budget information from the individual component. At the bottom of the table, you will see Overall totals for all of the components.

	Project Lead	Direct Costs	Indirect Costs	Federal Funds	Program Income	Total Funds	
ADMIN-CORE							
Core_Link2	Miller, John	60,000	0	60,000	0	60,000	
CORE							
PROJECT							
Research Project #1	Heldens, John	1,588,009	372,404	1,960,413	0	1,960,413	
Test Project	Campo, Larry	0	0	0	0	0	
OVERALL		3,162,477	749,453	3,911,930	25,000	3,911,930	


Hovering the mouse over the borders of each individual header will allow you to expand or collapse the section as you see fit.

Interacting with Linked Components

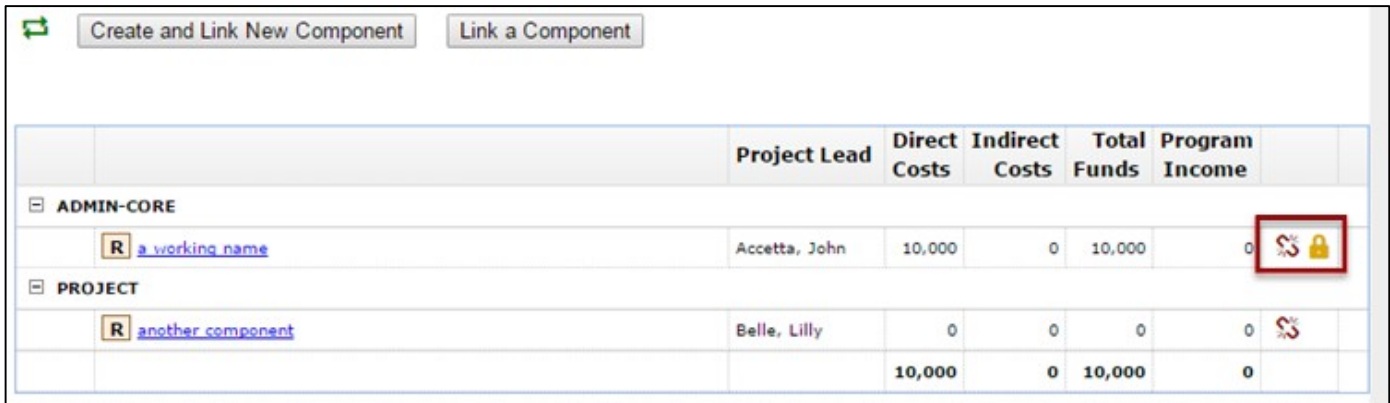
On the 'Linked Components' screen, clicking the icon at the top left will refresh the components and their associated information.

Clicking the or beside each section will expand or collapse the individual components within that section. If you have two or more components in one section, you will see arrows appear beside each component. These arrows can be used to change the order of the components in any particular section.

CORE							
The Training Core	Miller, John	1,514,468	377,049	1,891,517	25,000	1,891,517	
Stats Core	Heldens, John	0	0	0	0	0	

Finally, each component will have an associated  icon. Clicking this button will prompt you to unlink the associated component. However, this does not delete the component. It will still appear as an unlinked component on the Proposal List. You can easily relink it by pressing the **Link a Component** button.

Opening the linked components is the same as [opening a proposal](#) from the proposal tab. You can open the component in Read-Only mode, and if another user is working on the component, it will show as 'locked.' The lock icon to show a locked component is to the right of the unlink button. Hovering over the lock icon will show you who has locked the component.

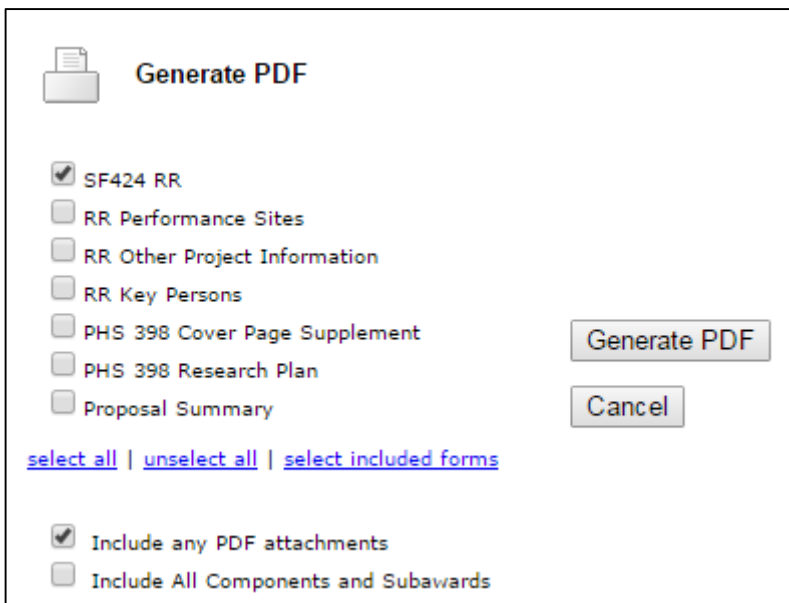


		Project Lead	Direct Costs	Indirect Costs	Total Funds	Program Income	
ADMIN-CORE	a working name	Accetta, John	10,000	0	10,000	0	
PROJECT	another component	Belle, Lilly	0	0	0	0	
			10,000	0	10,000	0	

You can also print the entire proposal by clicking the print icon in the proposal management toolbar at the top of the proposal.



This will launch the print dialog, which has a number of options for printing. Select "Include All Components and Subawards" along with all other forms on the dialog to print all components of your multi-project proposal.



Generate PDF

- SF424 RR
- RR Performance Sites
- RR Other Project Information
- RR Key Persons
- PHS 398 Cover Page Supplement
- PHS 398 Research Plan
- Proposal Summary

[select all](#) | [unselect all](#) | [select included forms](#)

Include any PDF attachments

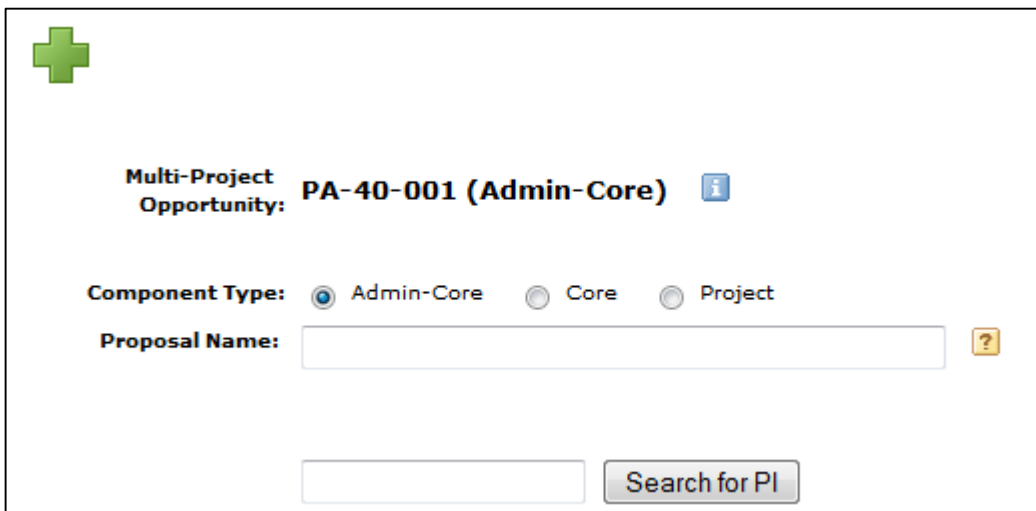
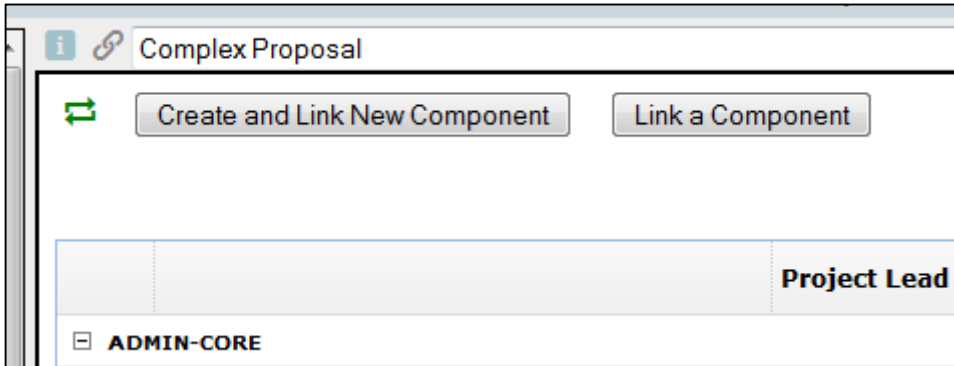
Include All Components and Subawards

Generate PDF **Cancel**

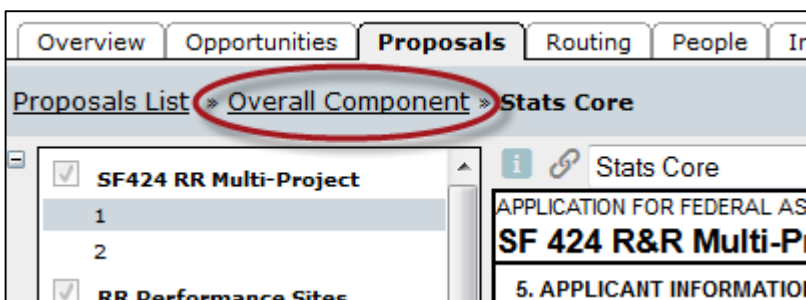
Creating New Linked Components

When working in a Multi-Project (Complex) Proposal, you can Create and Link Components on the Linked Components screen. To do so, select **Create and Link New Component**.

Clicking that button will cause a **Create Proposal** window to appear. In this window, you'll need to set the Component Type, in addition to standard information you would input when setting up any other proposal.

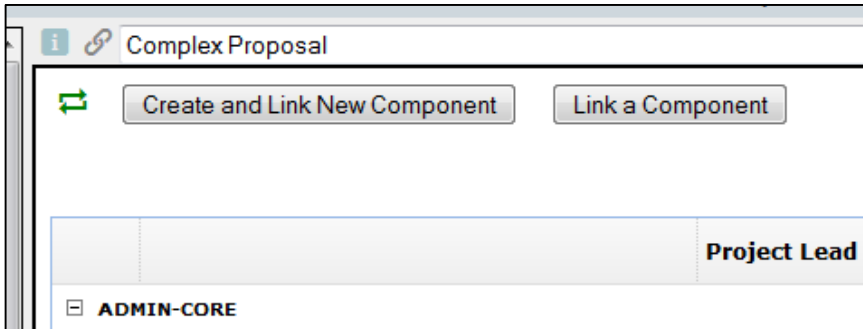
A screenshot of a "Create Proposal" form. At the top left is a green plus icon. The form displays "Multi-Project Opportunity: PA-40-001 (Admin-Core)" with an information icon. Below this, the "Component Type" is set to "Admin-Core" with radio buttons for "Admin-Core", "Core", and "Project". There is a "Proposal Name" input field with a help icon. At the bottom, there is another empty input field and a "Search for PI" button.

When finished, click **Create Proposal** and you will be taken into the now linked component. To head back to the Overall component, click **Overall Component** in the breadcrumb trail at the top left of the screen.



Linking an Existing Component

In addition to [Creating and Linking New Components](#), you can also Link an Existing Component in a Multi-Project (Complex) Proposal. To link a previously created component, just click the **Link a Component** button.



A prompt will then appear listing all of the Proposals and Components that can be linked to this Multi-Project Proposal. Note that the Link a Component button will only present you with a list of components that are eligible to be linked to the Overall component you are working in. The list will not show you components derived from other opportunities or components already linked to this Overall.

Upon selecting the desired Proposal, you'll be taken back to the Linked Components page, where the selected Component will now be listed.

Components that may be linked to this	
Component Name	Project Lead
Admin-core	Compton, Lora
Proposal administration with Cay	Akroyd, Christian
The Clinical Core	Campo, Larry
The Research Core	Coulter, David

To link a component, you need to have write access to the component. If you don't have access to the necessary component, you'll encounter a message like the one below.

Components that may be linked	
Component Name	Project Lead
PA-40-206 Training component	Remington, John
PA-40-206 Inst-Career-Dev com	<p>Cannot Link Component</p> <p>You must have write permission for a component to be able to link it to an MP Proposal</p>

Transforming Existing Components

Components, even if they are unlinked and have the same name and even form set, are not portable across Multi-Project (Complex) opportunities. This is the reason the list of linkable components offered by the **Link a Component** dialog only offers standalone components derived from the same opportunity that is being worked on.

However, the Cayuse 424 copy/transform capability is particularly useful for dealing with this limitation. The transform function can change:

- Component A into Component B within an opportunity
- Component A into Component B across opportunities
- Component into Proposal

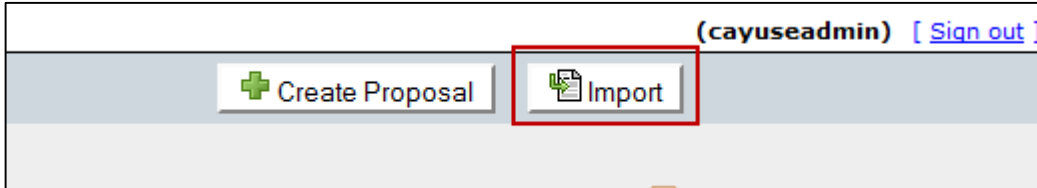
Cayuse 424 users can even transform a regular proposal based on an R01 opportunity into a specific component type and then link it to their Multi-Project proposal.

Importing and Exporting Multi-Project Components

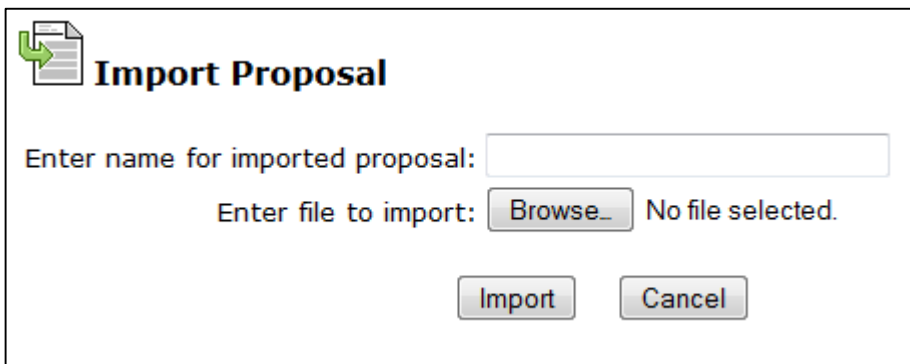
When working with Multi-Project (Complex) Proposals in Cayuse 424, you'll have the ability to [Import Components](#) from other institutions, in addition to [Exporting Components](#) for other Cayuse 424 customers.

Importing a Component

On the Proposals List, select the **Import** button at the top right of the screen.



You'll then see the Import Proposal window, which will prompt you to find the file you wish to import, and name the Proposal you are importing.

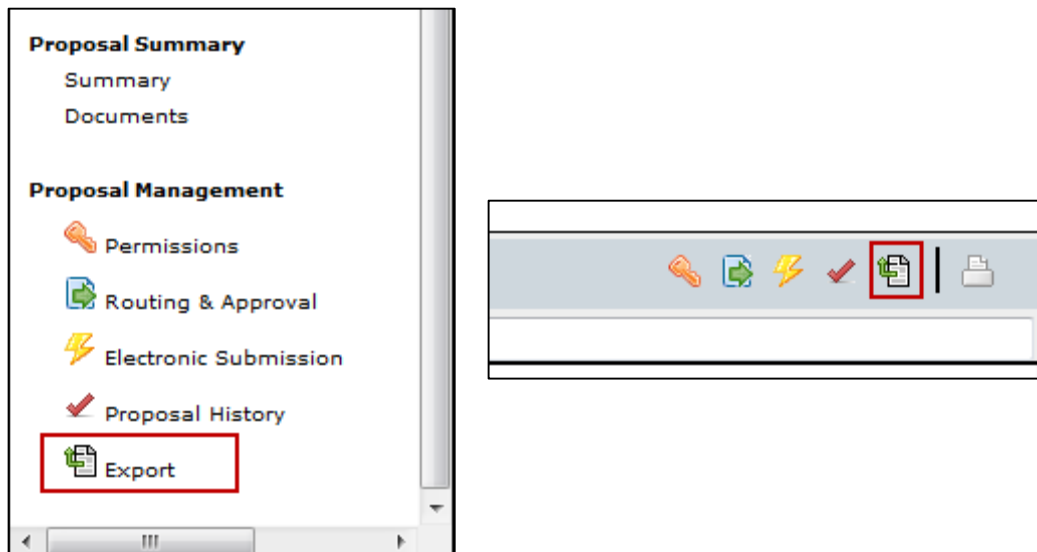


Upon clicking **Import**, the file will be imported into Cayuse 424 as an unlinked Component. To link the component to an existing Multi-Project Proposal, you'll want to follow the instructions on the page [Linking a Component](#).

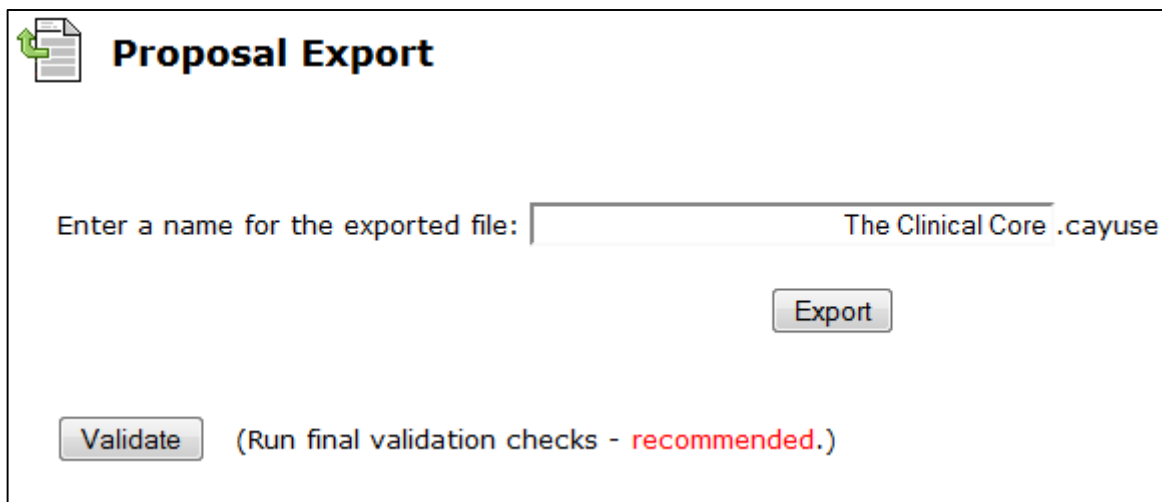
Exporting a Component

From the Proposals List, select an unlinked, individual component.

Click the **Export** option on the left side of the screen. There is also an icon located at the top right of the page.



You'll then be given the option to name the component, as well as run a validation check prior to export.



The image shows a dialog box titled 'Proposal Export' with a document icon. It contains a text input field with the placeholder text 'Enter a name for the exported file:' and the text 'The Clinical Core .cayuse'. Below the input field is an 'Export' button. At the bottom left is a 'Validate' button, followed by the text '(Run final validation checks - recommended.)'.

Upon clicking **Export**, you will be prompted to save the file to your computer. You'll then be able to send the file to other customers for import into their Cayuse 424 environment. Attachments and any associated Subawards will be included in the exported file.

Finally, note that this file uses a .cayuse file extension. This file cannot be opened by clicking on it like other computer files. It can only be opened by first importing it into Cayuse 424.

Validation of Multi-Project Proposals

When working in a Multi-Project (Complex) Proposal, Cayuse 424 provides the following validations across all components:

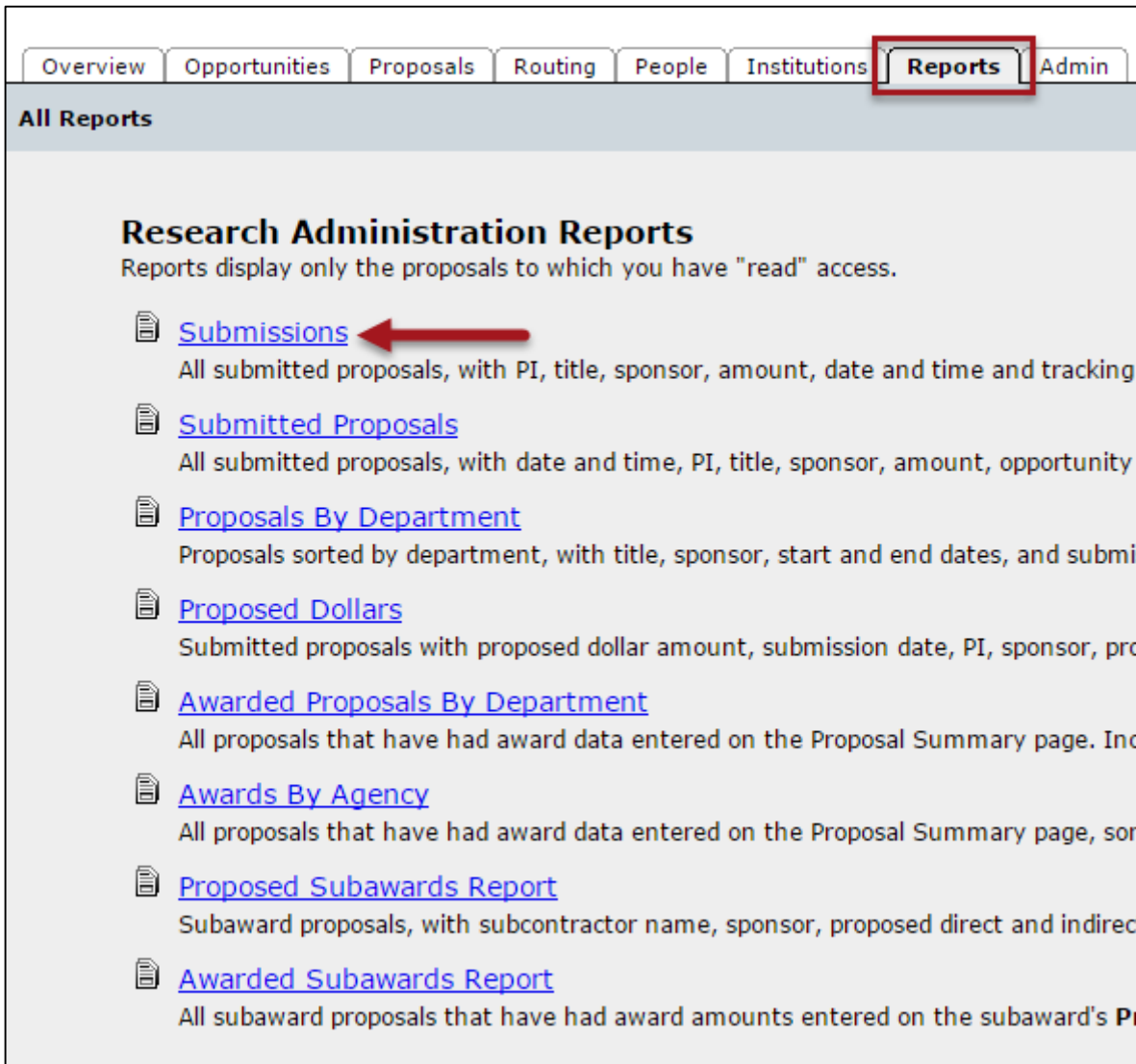
- Human Embryonic Stem Cell lines.
- Check for redundant BioSketches across the entire MP project (1 per eRA Commons credential).
- Check for Human Subjects usage across components. This means that, if any component has checked "Yes" for Human Subjects then OAC must be checked for yes.
- Check for Vertebrate Animal usage across components.
- Check for Foreign Activities across components.
- Check for consistent budget start dates, end dates and number of budget periods.

Delete this text and replace it with your own content.

Reporting

Cayuse 424 offers eight reporting tools to track submitted proposals, proposed dollars, awarded proposals and subawards. The **Submissions** link will display a broad overview of all the submitted proposals you currently have access to. This list can be quickly filtered using three techniques.

- **Submitter**
- **Date Submitted**
- **Section Heading**



The screenshot shows the 'Reports' section of the Cayuse 424 interface. At the top, there is a navigation bar with tabs for Overview, Opportunities, Proposals, Routing, People, Institutions, Reports, and Admin. The 'Reports' tab is highlighted with a red box. Below the navigation bar, the page title is 'All Reports'. The main content area is titled 'Research Administration Reports' and includes a sub-header: 'Reports display only the proposals to which you have "read" access.' A list of eight report types is displayed, each with a document icon and a description. The first item, 'Submissions', is highlighted with a red arrow pointing to it. The other items are: Submitted Proposals, Proposals By Department, Proposed Dollars, Awarded Proposals By Department, Awards By Agency, Proposed Subawards Report, and Awarded Subawards Report.


Report Type	Description
Submissions	All submitted proposals, with PI, title, sponsor, amount, date and time and tracking
Submitted Proposals	All submitted proposals, with date and time, PI, title, sponsor, amount, opportunity
Proposals By Department	Proposals sorted by department, with title, sponsor, start and end dates, and submit
Proposed Dollars	Submitted proposals with proposed dollar amount, submission date, PI, sponsor, pro
Awarded Proposals By Department	All proposals that have had award data entered on the Proposal Summary page. Inc
Awards By Agency	All proposals that have had award data entered on the Proposal Summary page, sor
Proposed Subawards Report	Subaward proposals, with subcontractor name, sponsor, proposed direct and indirect
Awarded Subawards Report	All subaward proposals that have had award amounts entered on the subaward's Pr

Submission Report

Submitted proposals to which you have "read" access.

Submitter:

Submitted Between: -

	Proposal Title	PI	Submitter	Submitted
Cancer Cure		Armstead, Jennifer	Admin, Cayuse (cayuseadmin)	2015-03-17 07:11 PDT
Cancer Cure		Armstead, Jennifer	Admin, Cayuse (cayuseadmin)	2015-03-17 07:08 PDT
CC_TEST		Akroyd, Christian	Admin, Cayuse (cayuseadmin)	2015-08-19 15:52 PDT
CC_TEST		Akroyd, Christian	Admin, Cayuse (cayuseadmin)	2015-11-23 11:10 PST
CDC Example Proposal		Belle, Lilly	Admin, Cayuse (cayuseadmin)	2013-07-26 06:48 PDT
ERC15 - Building Bridges		Hopkins, Virginia	Admin, Cayuse (cayuseadmin)	2015-09-23 11:09 PDT

Additional reports can only be viewed in either PDF or CSV form using the **Generate Report** button. The same filtration and sorting mechanisms of date, title, PI name, and amount still can be selected either using the **Calendar Icons** or the **Sort By** drop down.

Proposed Dollars Report

Submitted proposals with proposed dollar amount, submission date, PI, sponsor, project start and finish dates.

Project Started Between: -

Proposal Submitted Between: -

Sort By:

Output type?

- PDF
 CSV

Generate Report

Glossary

A

AOR

An AOR is an Authorized Organizational Representative. They either submit the proposal themselves or authorize someone else to do it.

B

Breadcrumb

A breadcrumb is a horizontal chain of links providing the user with context and possibly navigation to any of the links in the chain. These terms are frequently used throughout the manual.

C

Calculation field

A calculation field derives its information from one or more other fields. Calculated fields are automatically computed while you are filling in the form. These fields are recalculated each time you enter data into a related or linked field. Many of the calculated fields permit you

to overwrite their calculated entries. In those fields where overwriting is permitted, a red asterisk will appear next to the field indicating that you have over-written it. If you overwrite a calculated field, the information in that field will not be updated when you change the information in other, related fields. This can cause your final values to be wrong! Use caution when overwriting calculated fields!

Checkbox field

A checkbox field operates like an On-Off switch. When "On", it appears as a box with an X in it; when "Off", it appears empty. To mark a checkbox, click it with your mouse. You cannot move into it by using the Tab key. Some checkboxes are also radio buttons.

Currency field

A currency field allows you to enter only numbers. To display \$10.00, you would enter a value of 10. To display \$10.99, you would enter 10.99.

F

Field

A field is a blank space or area on a form where you may enter information or data. Each field on a Cayuse 424 form has been designed to accept certain types of data, and to handle those data in a specific way.

Forms

Most of us associate a form with a printed document with blank spaces to be filled in, such as an application for employment. A Cayuse 424 electronic form is essentially the same, except that before it is filled-in, the form starts out on a computer screen rather than on paper.

G

General Field

General Fields accept any type of data: letters, numbers, special characters, punctuation, or a mixture thereof.

I

Institution

An institution has an entry in the Institutional profile database which includes enough information to allow submission of proposals by that institution. This information can be auto-filled into proposals. If you are submitting proposals with multiple budgets, you may need multiple institutional profiles.

L

Listbox

A listbox is a text box containing a list of selectable items.

P

Percentage

A percentage field allows you to enter only numbers. Percentages must be typed using this format: XY.Z%.

Personnel

Cayuse 424 contains a professional profile database which includes enough information to add a person to a proposal. This information can be auto-filled into proposals.

Pre-Award Admin

Pre-Award Admin is a Cayuse 424 role usually held by staff in the central Research office. These users have additional privileges in the system. The exact privileges may differ among institutions.

R

Radio Buttons

Radio buttons are groups of two or more mutually exclusive checkboxes. Selecting one option automatically deselects all other options in the group. For example, Item 2 of the PHS 398 has Yes and No radio buttons. To select an option from a group of radio buttons, click it with your mouse.

U

User

A Cayuse 424 user has a Cayuse 424 login and password. A user can create and modify proposals. A user may also have a record in the Cayuse 424 Professional Profile database.