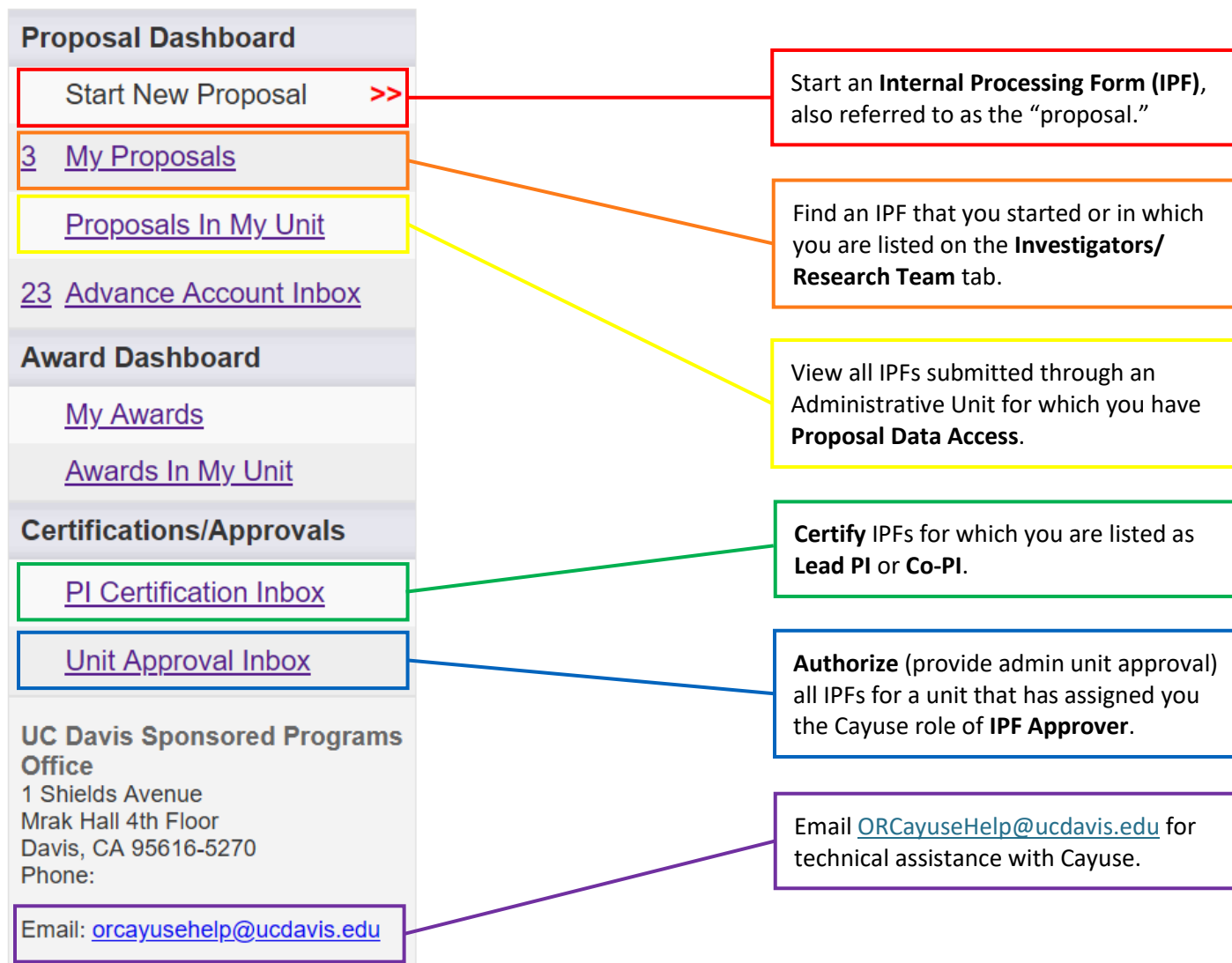


Cayuse SP – Quick Reference

Working with SPO on Proposals

Contents

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Prepare and Submit a Proposal

Sponsor Information

* Sponsor: ⓘ 🔍

Funding Opportunity/Sponsor application No:

Sponsor Program Name:

Proposal Guideline URL:

Prime Funding Agency: 🔍

General Proposal Information

* Admin Unit: 🔍

* Primary Administrative Contact: 🔍

Proposal Owner:

Project No:

* Short Project Name: (internal reference name)

* Project Start Date: mm/dd/yyyy

* Project End Date: mm/dd/yyyy

* Activity Code: [Click Here to Choose Activity Code](#)

* Proposal Type:

* Instrument Type:

How will this proposal be submitted?

Select Submission Method:

Affiliated Unit(s) (if applicable): [Click Here to Choose Affiliated Unit\(s\)](#)

* Sponsor Deadline: Time:

Postmark: Receipt:

* Title of Project:

Create a Paired Proposal Pair with a 424 Proposal Un-Pair with 424 Proposal

The institution that will send us the funding. For a subaward, this could be a pass-thru entity.

If a sponsor is not found, check the spelling and try again. If still not found, select **Miscellaneous Sponsors** to continue then add sponsor details under **Submission Notes** (next screen).

For a subaward proposal, indicate the original sponsor here.

Short Project Name is for internal use. See instructions at top of Cayuse webpage.

If submitting an admin unit or PI change request, enter the "old" unit here so they can approve.

Do NOT pair proposals. This creates technical errors.

Enter time in **military** format (i.e., 17:00 for 5:00 PM), select **Pacific** for Davis, and click **Receipt**

Item List 20-2566 

View or Edit completed sections by clicking the name next to the check.

 General Information 
Investigators/Research Team
Budget
Financial Conflicts of Interest in Research
Regulatory Compliance
Subrecipients
Foreign Activity
Special Interest
Additional Questions
Location of Sponsored Activities
Proposal Abstract
Proposal Attachments
Approving Units
Submission Notes

A **green checkmark** will display when a tab is complete. The first page completed becomes the **General Information** tab.

In order to submit, all tabs other than **Submission Notes** require a green checkmark.

Use **Submission Notes** to share details with reviewers that may help expedite their review.
If **Miscellaneous Sponsors** was selected above, enter sponsor details so that SPO can add it to the Cayuse system.

Read the top of each tab for completion instructions and other key information.

>> Investigators/Research Team

All key personnel must be entered on this page. If you wish to enter additional (non-key) personnel, you may do so.


Please note: any corrections or changes to the "List of Personnel" below during IPF review may require reauthorization of the Departments and/or Deans' Offices.

Allocation of Credit

- Allocation of credit is used for reporting and must total 100%.
- Allocation of credit will allow reporting options that have been requested by the deans on campus.
- For example, a proposal with 3 investigators in 3 different colleges might have allocated credit of 20%, 30% and 50% among the investigators.
When the proposal is reported, the respective colleges will receive 20%, 30% and 50% of the credit.
Standard reporting based on the Admin Unit identified on the General Information page will still be possible.
- Allocated credit will not be used to proportionally distribute recovered F&A on an awarded project.
- Agreements on distribution of F&A on multi-unit proposals should be documented as an attachment (see Proposal Attachments page) to the proposal.
- **NOTE: If the "Allocation of Credit" column is not completed by the requesting department, SPO will allocate equal credit to each listed personnel.**

NOTE: The sum of allocated credit on this proposal is currently 0%.

Add Personnel Information

* Last Name: 

* First Name:

Phone:

Email:

* Person Months:

* Unit:

* Role: **Lead Principal Investigator** ▼

* Sponsored Effort %:

Cost Shared Effort %:

Allocation of Credit %:

The first name entered becomes the Lead PI.

Save Personnel

List of Personnel:

This link opens an external PDF that helps you determine Person Months

Person	Unit	Role	Sponsored Effort	Cost Shared Effort	Total Effort	Allocation of Credit	Person Months		
Patricia Applegate	Med: Div Of Internal Med (Use the PI's Int Med Dept.) (049014)	Lead Principal Investigator	30%	0%	30%	100%	3	Edit	Delete

Reset


Click **Edit** (on right) to update the **Unit** when instructed to do so.

Approving Units tab

Add Approving Unit

Unit:

List of Approving Units: (to edit the information, remove first, then add back)

Routing Order 	Unit Code	Unit	Role(s)
1	049239	Med: Intl Med- Allergy	Admin Unit
2 ▼	049205	Med: Intl Med- Cardiovascular	Lead Principal Investigator
3 ▼	20	Med: Intl Med (Use the PI's Int Med Dept.)	Rollup From - 049205, Rollup From - 049239
4 ▼	43	School of Medicine (Use 049000)	Rollup From - 20

Use the **Routing Order** to re-order **Approving Units** as needed due to “Rollup” units. Order rollup units **after** the unit they are rolling-up from.

Make sure there’s no break in the **Routing Order** numbers as this can pause the routing process.

Submit for Routing

Best practices:

1. Immediately after submitting the Cayuse SP IPF, encourage the PI and any named Co-PIs to access Cayuse SP and certify the proposal (*more about certifying on next page*)
2. As soon as the Cayuse SP IPF is routing internally for approvals, begin populating the proposal in an external submission system approved by the sponsor.
3. When SPO notifies you they have received the routed IPF, provide them access info so they can review the proposal in the sponsor’s submission system at the same time.

Certify a Proposal

Cayuse SP will email the Lead Principal Investigator and any co-Principal Investigators to request **certification**. The Lead Principal Investigator and all co-Principal Investigators **must** certify IPFs **before** assignment to a Sponsored Programs analyst.

IPFs received without all required certifications will be returned, delaying the review and submission process.

Proposal Dashboard

- [Start New Proposal](#)
- 42 [My Proposals](#)
- [Proposals In My Unit](#)
- 3 [Advance Account Inbox](#)

Award Dashboard

- [My Awards](#)
- [Awards In My Unit](#)

Certifications/Approvals

- 17 [PI Certification Inbox](#) >>
- 1 [Unit Approval Inbox](#)

UC Davis Sponsored Programs Office
1850 Research Park Drive
Suite 300
Davis, CA 95618
Phone:
Email: grcayusehelp@ucdavis.edu

>> PI Certification Inbox

To be Certified | Previously Reviewed

Below is a list of proposals that require your certification as Lead or Principal Investigator.

Date Submitted	Proposal No.	Project Name	Sponsor	Deadline	PDF
6/23/2020	20-2664	Socio-ecological factors in Malaria transmission	NIH National Institute of Allergy and Infectious Diseases (NIAID)	06/30/2020	
5/21/2020	20-2627	SDPS Class Sample - Cayuse Subawards	National Science Foundation (NSF)	07/17/2020	

Proposal Routing Status

Proposal: [20-2664](#)

Project:

Lead PI: [Charlie Apple](#)

Admin Unit: Med: Intl Med- Infectious Disease

Project Title: Socio-ecological factors in Malaria transmission

Sponsor: NIH National Institute of Allergy and Infectious Diseases (NIAID)

Prime Sponsor:

Instrument Type: Grant

Specialists:

Submission Deadline: 6/30/2020

Proposed Begin-End Dates: 1/01/2021 - 12/31/2022

Proposed Total Amount: \$76,553.00

Approvals | Compliance | Status History | Advance Account | Awards |

The above proposal has been successfully submitted. All lead/principal investigators and approving units listed below have been notified and should electronically authorize (in routing order for units) this proposal before it is received by the UC Davis Sponsored Programs Office.

Investigator(s) who must certify this Proposal

Investigator	Role	Decision
Charlie Apple	Lead Principal Investigator	Not Yet Reviewed

Item List 20-2664

View or Edit completed sections by clicking the name next to the check.

- ✓ General Information >>
- ✓ [Investigators/Research Team](#)
- ✓ [Budget](#)
- ✓ [Financial Conflicts of Interest in Research](#)
- ✓ [Regulatory Compliance](#)
- ✓ [Subrecipients](#)
- ✓ [Foreign Activity](#)
- ✓ [Special Interest](#)
- ✓ [Additional Questions](#)
- ✓ [Location of Sponsored Activities](#)
- ✓ [Proposal Abstract](#)
- ✓ [Proposal Attachments](#)
- ✓ [Approving Units](#)
- ✓ [Submission Notes](#)

>> General Information

Please enter your proposal information in the following pages. Please be as complete and accurate as possible.

- The **Short Project Title** (below on this page) should be entered as:
PI preferred submission date (may be different than sponsor due date) in **MMDDYY** format; PI last name
Example: 10/15/17 Smith NIH
- Entries should be made for **Affiliated Unit(s)** if resources outside control of the Admin Unit are provided in the budget.
- Any work done at the **Primate Center** must have the Primate Center listed as an Affiliated Unit if it is included in the proposal.
- Enter the Sponsor Deadline Time as the time the proposal is due at the sponsor in Pacific time using the format MM/DD/YYYY HH:MM:SS.

Warning: Due to the large number of users in the system, performing a name search without entering a last name may return a large number of results.

Review the proposal for accuracy and completeness. Then select **Certify Proposal.**

Sponsor Information

* Sponsor:

Funding Opportunity/Sponsor application No:

Sponsor Program Name:

Proposal Guideline URL:

Prime Funding Agency:

General Proposal Information

>> Proposal Certification

In my role as an investigator, I understand and certify that:

- The information submitted within this application is true, complete and accurate to the best of my knowledge. Any false, fictitious, or fraudulent statements or claims may subject the Organization, and the **investigators personally** to criminal, civil or administrative penalties.
- I have the responsibility for the scientific, fiscal and ethical conduct of the project and to provide the required progress reports if an award is made.
- I will comply with all relevant state and federal regulations, University policies and contractual obligations, in administering the resultant award, including those found in [The Contract and Grant Manual](#).
- I have reviewed applicable U.S. Export Control requirements and University policy on Export Controls and will comply with the export control requirements.
- If this is an NIH application, I will comply with the NIH Policy on Public Access.
- I will work to ensure that my relationship with the sponsor of this project is either free of conflict of interest or consistent with a previously disclosed conflict of interest management plan.
- I attest that all known foreign affiliations and outside activities have been disclosed in the proposal/application as required by the sponsoring agency, and that those activities have been disclosed to the COIC/COI offices as applicable.
- If this proposal/project is requesting federal funding, then I attest that because 2 CFR Section 200 prohibits the use of federal funds in procuring prohibited telecommunications or surveillance equipment or certain services as described in the National Defense Authorization Act (NDAA) Section 889 (see: <https://research.ucdavis.edu/proposals-grants-contracts/spo/research-agreement-compliance/>), I will ensure no such prohibited equipment or services will be used in performance of this project. Further, as Principal Investigator of the project, I understand that I am responsible for ensuring that all personnel assigned to this project are fully informed of their obligation to comply with the above restrictions of neither purchasing, nor using any such equipment in performance of this project.
- I certify that there will not be any Russian entities contracted/paid under this proposed project.

By Selecting the "Submit Certification" button, you are attesting that you have read and agree to all the statements above.

Please enter any comments or additional information you might have regarding this proposal.

Read the statements and select **Submit Certification.**