Cayuse 424:
Professional Profiles and Applications
-SPO BAASICS-
August 6, 2020
Presented by Kassie M. Obelleiro
Sponsored Programs Training Officer
Zoom Instructions

[Image of Zoom interface with arrows indicating various features and options.]
Zoom Instructions - Annotations

01
At the top of this screen:
Select “View Options”
Select “Annotations”

02
Choose a stamp
Select “Stamp”
Choose (click) any stamp

03
Practice
Put you stamp in the box to the left
Learning Objectives

01 eRA Guidelines
- Know some of the general eRA guidelines

02 Professional Profiles
- Understand the purpose of a Professional Profile

03 Maintain Profiles
- Know how to create and update a Professional Profile

04 Applications
- Know how to submit a proposal in Cayuse 424 and with SPO during review and sponsor submission
Outline

- eRA Overview
- Cayuse Overview
- Professional Profiles
- Applications
- Resources
eRA Overview
General Guidelines and Common eRA Systems
Funding Process at UC Davis

- PI has an idea and finds funding
- PI writes proposal
- Department helps prepare details
- PI/Dept sends proposal to SPO

PI/Department (Dept)

- Reviews for campus compliance, sponsor compliance and terms & conditions
- Submits proposal to Sponsor*

SPO

- Reviews proposals
- Notifies PI/Dept/SPO of funding decision

Sponsor

- Reviews award terms and conditions for conformity with UC policy and negotiates as needed
- Accepts award on behalf of the Regents
General eRA Guidelines

Sponsor Guidelines
Review program specific and sponsor overarching guidelines

Register Early
Allow several days for account registration and set-up

SPO Review and Approval
Provide SPO access to documents, if necessary, for review, approval and submission

Points of Contact
Program Contact: Principal Investigator
• PI's email
Admin Contact: SPO Award Analyst
• awards@ucdavis.edu
Financial Contact: James Ringo, CGA
• efa-invoices@ucdavis.edu

Availability
Ensure the PI and/or department contract and grant administrator is available during SPO review
## Common eRA Roles

<table>
<thead>
<tr>
<th>Sponsored Projects Office (SPO)</th>
<th>Proposal approval and other administrator roles</th>
</tr>
</thead>
<tbody>
<tr>
<td>Investigator</td>
<td>Proposal submission, award management and proposal review</td>
</tr>
<tr>
<td>Department and Other Staff</td>
<td>Proposal and award staff roles</td>
</tr>
</tbody>
</table>

### Sponsored Projects Office (SPO)

- **Sponsored Projects Office (SPO):** Central office responsible for endorsement of proposals
- **Authorized Organizational Representative (AOR):** Proposal approver (on behalf of the UC Regents)
- **Signing Official (SO):** Proposal approver (on behalf of the UC Regents)
Common eRA Roles

**Sponsored Projects Office (SPO)**
Proposal approval and other administrator roles

**Investigator**
Proposal submission, award management and proposal review

**Department and Other Staff**
Proposal and award staff roles

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**Sponsored Projects Office (SPO):**
Central office responsible for endorsement of proposals

**Authorized Organizational Representative (AOR):**
Proposal approver (on behalf of the UC Regents)

**Signing Official (SO):**
Proposal approver (on behalf of the UC Regents)

**Investigator**

- **Principal Investigator (PI):**
  Lead PI or Contact PI on grants with co-PIs

- **co-Principal Investigator (co-PI):**
  Investigator with same responsibility as PI

- **co-Investigator:**
  Primary contributor to the project; Does not have programmatic decision-making authority

- **Reviewer:**
  Reviews proposals on behalf of sponsor
Common eRA Roles

**Sponsored Projects Office (SPO)**
Proposal approval and other administrator roles

**Investigator**
Proposal submission, award management and proposal review

**Department and Other Staff**
Proposal and award staff roles

**Department and Other Staff**

- **Other Authorized User (OAU):** Non-investigator role; May assist with budget preparation, proposal file updates and post-award actions
- **Financial Administrator:** Grants access to financial services, such as cash requests and grantee EFT
Proposal Submission

Submit to SPO
Proposals and some award modifications

View Roles
View role assignments for admin units

Submit to Federal Sponsors
Submit applications to most Federal and some other sponsors
NSF FastLane/Research.gov Roles

Sponsored Programs
Roles with approval and submission permissions

Investigator/Research Team
Roles with access to specific records

Sponsored Programs

- Authorized Organizational Representative (AOR): Approves and submits proposals
Investigator/Research Team

- Principal Investigator (PI) or co-PI: Responsible for scientific or technical direction; Can perform proposal and award actions

- Other Authorized User (OAU): May assist with budget preparation and revision with the Proposal PIN and ID number
NSF FastLane/Research.gov Access Guidelines

NSF ID Look-Up
Ensure the user does not have an NSF ID

Register for an NSF ID
PIs and OAUs need an NSF ID

Request OAU Access
Email the NSF ID to spoerahelp@ucdavis.edu and request OAU access

Request UCD Affiliation for PIs
- Request access during registration using the UCD DUNS number
- SPO will be notified and process the affiliation

*May request at account registration with work-around
NSF FastLane/Research.gov Submission Guidelines

Review Sponsor Guidelines
Check frequently for updates

Give SPO Access
Add your assigned SPO analyst

Finalize Early
Submitting 2 days early allows time to correct post-submission and mitigates electronic submission issues
NIH eRA Commons Roles

Sponsored Programs
Roles with approval and submission permissions

Investigator/Research Team
Roles with access to specific records

Sponsored Programs

- Administrative Official (AO): Reviews proposals
- Signing Official (SO): Approves and submits proposals
NIH eRA Commons Roles

Sponsored Programs
Roles with approval and submission permissions

Investigator/Research Team
Roles with access to specific records

Investigator/Research Team

- **Principal Investigator (PI)/Project Director:** Responsible for scientific or technical direction; Can perform proposal and award actions
  - Must have an eRA Commons account when the application is started in ASSIST
- **Assistant (ASST):** May edit application
NIH eRA Commons Guidelines

Register Early
All users need an eRA Commons ID

Finalize Application 2 Days Before Deadline
• Allows time to correct post-submission
• Avoids missing deadlines due to unforeseen circumstances

Read Sponsor Guidelines
Check for updates regularly

SPO Submits
SPO submits applications and post-award actions, including RPPRs except SNAP awards
NIH x-Train

Manage Trainee Appointments
• Institutional Research Training Grants
• Institutional Career Development Awards
• Research Education Awards

Required Roles
• TRAINEE – Enters data and manages
• PI – Enters data and manages
• SO – View access
• BO – Submits Terminations
• SPONSOR – Terminates Fellows
• ASST (when delegated by SPONSOR or PI)
Activity 1: General eRA Guidelines

Using the annotate feature, put a stamp to identify what guidelines below are TRUE.

- Register for Profiles Early
- Read the Sponsor Guidelines
- Give SPO Access
- Do NOT Respond to SPO’s Emails
Cayuse Overview
Cayuse Research Suite: Cayuse SP and Cayuse 424
Cayuse

Cayuse SP
Internal routing and approval

Cayuse 424
Application submission to most Federal sponsors

System Administration
Unit Roles list and System Administration applications

Cayuse Research Suite 3.7.2

Research Administration Modules
- Cayuse SP (Sponsored Projects)
- Cayuse 424

System Administration Applications
- Backbone
- Research Contacts
- Workflow

Application Help
- Research Suite Support Center
Cayuse SP

Proposal and Award Modification Routing
Lead PI and co-PI certification
Department Chair and Dean authorization
SPO approval

Award Record Repository
Record of proposals, awards and subawards

Advance Account Request Routing
Department Chair endorsement
SPO approval

Proposal Dashboard
- Start New Proposal
- My Proposals
- Proposals In My Unit
- Advance Account Inbox

Award Dashboard
- My Awards
- Awards In My Unit

Certifications/Approvals
- PI Certification Inbox
- Unit Approval Inbox

UC Davis Sponsored Programs Office
1850 Research Park Drive
Suite 300
Davis, CA 95618
Phone:
Email: orcayusehelp@ucdavis.edu
Cayuse 424

Manage profiles, submit applications to sponsors and create/import Subaward proposals

Professional Profiles
Appointment, Salary and Unit Affiliation

Sponsor Submission
Grants.gov Proposals
Do NOT USE for NSF Proposals
<table>
<thead>
<tr>
<th>Proposal</th>
<th>Title</th>
<th>PI</th>
<th>Modified</th>
<th>Type</th>
<th>Deadline</th>
</tr>
</thead>
<tbody>
<tr>
<td>8/15/19 Apple NIH</td>
<td>TBD</td>
<td>Apple, Charlie</td>
<td>10-30-2019</td>
<td>G.g. Training and NDH Ext-UAT FOA (R01-C)</td>
<td>08-15-2019</td>
</tr>
<tr>
<td>NIH NCI</td>
<td></td>
<td>Apple, Charlie</td>
<td>08-15-2019</td>
<td>Research Subaward</td>
<td>08-22-2019</td>
</tr>
<tr>
<td>8/15/2019 Apple NIH (424 Training Session Example)</td>
<td>TBD</td>
<td>Apple, Charlie</td>
<td>07-31-2019</td>
<td>G.g. Training and NDH Ext-UAT FOA (R01-C)</td>
<td>08-15-2019</td>
</tr>
<tr>
<td>05/16/2019 Apple NIH NCI</td>
<td>Subawards test proposal</td>
<td>Apple, Charlie</td>
<td>07-25-2019</td>
<td>G.g. Training and NDH Ext-UAT FOA (Chang)</td>
<td>08-01-2019</td>
</tr>
<tr>
<td>20-0012 08/1/2019 Apple NIH NCI</td>
<td>Subawards Test Proposal</td>
<td>Apple, Charlie</td>
<td>07-25-2019</td>
<td>G.g. Training and NDH Ext-UAT FOA (Chang)</td>
<td>08-01-2019</td>
</tr>
<tr>
<td>20-0015 5/16/2019 Admin Ample</td>
<td>testing Full Title</td>
<td>Apple, Charlie</td>
<td>07-25-2019</td>
<td>G.g. Training and NDH Ext-UAT FOA (Chang)</td>
<td>08-01-2019</td>
</tr>
<tr>
<td>20-0010 08/01/19 Apple NIH NC</td>
<td>Subawards Test Proposal</td>
<td>Apple, Charlie</td>
<td>07-25-2019</td>
<td>G.g. Training and NDH Ext-UAT FOA (Chang)</td>
<td>08-01-2019</td>
</tr>
<tr>
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<td>Subawards Test Proposal</td>
<td>Apple, Charlie</td>
<td>07-25-2019</td>
<td>G.g. Training and NDH Ext-UAT FOA (Chang)</td>
<td>08-01-2019</td>
</tr>
<tr>
<td>Apple NIH 08/07/19</td>
<td></td>
<td>Apple, Charlie</td>
<td>07-11-2019</td>
<td>G.g. Training and NDH Ext-UAT FOA (R01-C)</td>
<td>07-18-2019</td>
</tr>
</tbody>
</table>
Activity 2: Determine which eRA System

Using the annotate feature, put a stamp in the box to answer my questions.

FastLane/Research.gov

ASSIST/eRA Commons

Cayuse 424
Professional Profiles

Cayuse 424 Professional Profiles include investigator and staff appointment, salary and other information.
Overview
All users need a professional profile in Cayuse 424 including investigators, senior personnel contract and grant staff.

Appointment Information
Default home unit, appointment type and contact information

eRA Role
Principal Investigator, assistant or SPO permissions

Budget Information
Salary and benefits code
Cayuse 424 Guidelines

Create and Maintain Professional Profiles
- Divisions/Departments
- Professional Titles
- eRA Roles
- Employee ID
  - Salary and benefit information
- Performance Site

Application Submission
- Find the funding opportunity
- Grant access to others
- Add SPO
- READ all sponsor guidelines
- Complete forms and mark them for inclusion
- Correct errors/warnings
- Have full application ready and approved by PI 2 days before the deadline
- SPO usually submits Application Submission
Cayuse 424 Roles

Sponsored Programs
Roles with approval and submission permissions

Investigator/Research Team
Roles with access to specific records

Sponsored Programs

• Administrative Official (AO): Reviews proposals and may submit proposals to the sponsor after AOR/SO approval

• Signing Official/AOR (SO): Approves proposals for sponsor submission and may submit proposals to the sponsor
Cayuse 424 Roles

Sponsored Programs
Roles with approval and submission permissions

Investigator/Research Team
Roles with access to specific records

Investigator/Research Team

- **Principal Investigator:**
  May be added to proposals as a Principal Investigator/Project Director; this role must be selected for the user to display on the “investigator” list

- **Assistant (ASST):**
  May edit proposals for the Principal Investigator; generally a department contract and grant admin
Poll: Professional Profiles

1. Who at UC Davis needs a Cayuse Professional Profile? (Multiple Choice)
   
   Answer 1: Principal Investigators
   Answer 2: co-Principal Investigators
   Answer 3: C&G Admin Staff
   Answer 4: Department Chairs/Unit Heads

2. The Cayuse Professional Profile affects the Cayuse SP routing process. (Single Choice)
   
   Answer 1: True
   Answer 2: False
# Activity 3: Create and Update Professional Profiles

<table>
<thead>
<tr>
<th>Instruction</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>01</td>
<td>Login to <a href="https://ucdavis.cayuse424.com">https://ucdavis.cayuse424.com</a> and go to Cayuse 424.</td>
</tr>
<tr>
<td>02</td>
<td>Determine if you have a Professional Profile.</td>
</tr>
<tr>
<td>03</td>
<td>Create or update your Professional Profile.</td>
</tr>
<tr>
<td>04</td>
<td>Give someone permission to your Professional Profile.</td>
</tr>
</tbody>
</table>
Finding a Professional Profile
Finding a Professional Profile

Search Results: 3 people

1. Admin, Amie
2. [Icon: View Only]
3. Admin Test, Cayuse
Creating a Professional Profile

Create Professional Profile

First name: Test
Middle name: User
Last name: Obelleiro

Cancel  Create New Profile
Creating a Professional Profile

Create Institutional Association

Institution: The Regents of the University of California (Davis) - UC Davis

Create Institutional Association  Cancel
Maintaining a Professional Profile
Grant Permissions
Grant Permissions

Permissions for Professional Profile: User, Test

Add user

(cayuseadmin)

<table>
<thead>
<tr>
<th>List</th>
<th>Read</th>
<th>Write</th>
<th>Autofill</th>
<th>Delete</th>
<th>Change Permissions</th>
<th>Add User</th>
<th>Remove User</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
</tbody>
</table>
Grant Permissions

Add Security Principal

<table>
<thead>
<tr>
<th>Type</th>
<th>User</th>
<th>Profile Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>U</td>
<td>amieadmin</td>
<td>Admin, Amie</td>
</tr>
</tbody>
</table>

Permissions for Professional Profile: User, Test

- (cayuseadmin)
  - List: ✗
  - Read: ✓
  - Write: ✓
  - Autocomplete: ✓
  - Delete: ✗
  - Change Permissions: ✗
  - Add User: ✓
  - Remove User: ✓

- Admin, Amie (amieadmin)
  - List: ✓
  - Read: ✓
  - Write: ✓
  - Autocomplete: ✓
  - Delete: ✓
  - Change Permissions: ✓
  - Add User: ✓
  - Remove User: ✗
Maintaining a Professional Profile
Maintaining a Professional Profile
Maintaining a Professional Profile

Professional Profile: Obelleiro, Test User

General Personal Information
- Name
- Degrees
- Demographics
- Biosketches

1 Institutional Association
- UC Davis
  - Contact Info
  - eRA Role
  - Dept / Division / Title
  - Salary and Fringe Worksheet
  - Performance I/O

Routing Profile

UC Davis
Department / Division / Title

Title: Ag. Biological & Ag Engineering

Is this appointment an employee of the U.S. Government?
If yes, select U.S. Government agency:

Is this appointment an employee of a foreign organization?
Maintaining a Professional Profile

Professional Profile: Obelleiro, Test User

General Personal Information
- Name
- Degrees
- Demographics
- Biosketches

1 Institutional Association
- UC Davis
  - Contact Info
  - eRA Role
  - Dept / Division / Title
  - Salary and Fringe Worksheet
  - Performance Site

Salary / Appointment type
- Employee ID: 99999999
- Appt Type:
  - Calendar: 9, Salary: 100000
  - Academic: 3, Summer: 3, Salary: 33333

Fringe Worksheet
- Category: Faculty Acad MSP S
  - Entry ($): 38.4
- Base Fringe Rate: %
- Fringe Rate Total: 38.40%
Maintaining a Professional Profile
Applications
Submit application to Federal sponsors
Application Materials

Sponsor Application
Complete Sponsor application forms and upload application documents in Cayuse 424.

Internal Documents
Complete the Internal Processing Form (IPF) and upload internal documents in Cayuse SP.

Follow the Rules
Provide required information & documents

Use the Resources
Review the Handbooks and the IPF pages

Confirm IPF Approvers
All Approving Units require an IPF Approver

Monitor Routing
Check the Status and ensure received by SPO at least 5 business days before deadline
Minimum Proposal Documents for SPO Assignment

**Completely Routed and Authorized IPF**
Complete IPF with Lead PI and co-PI Certifications and IPF Authorizations

**Budget Spreadsheet**
Strongly encouraged even if NOT required by the sponsor

**Budget Justification**
Strongly encouraged even if NOT required by the sponsor

**Scope of Work**
May submit a draft and provide the final before submission to sponsor
Cayuse 424 Routing, Approval and Submission

**PI Concurrence**
The PI indicates concurrence with the application, agreeing to submission to the sponsor.

Email concurrence is also acceptable.

**SPO Approval**
The SPO AOR will approve the application.

**Sponsor Submission**
SPO submit to the sponsor, with some exceptions.
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<td>08-15-2019</td>
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<tr>
<td>Coffee Cancer Mice</td>
<td>10-01-2019</td>
<td></td>
<td>Research Subaward</td>
<td>08-22-2019</td>
<td></td>
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<td>07-18-2019</td>
</tr>
</tbody>
</table>
Go the sponsor's website and READ ALL relevant guidelines.
<table>
<thead>
<tr>
<th>Opportunity Number</th>
<th>Title</th>
<th>Comp. ID</th>
<th>Comp. Title</th>
<th>Agency</th>
</tr>
</thead>
<tbody>
<tr>
<td>PA-EO-777</td>
<td>G.g. Training and NIH Ext-UAT FOA (Change of Institutional Type)</td>
<td>TYPE7-RESEARCH-E</td>
<td>Use for all R's (R01, R03, R21, R3)</td>
<td>National Institutes of Health</td>
</tr>
<tr>
<td>PA-EO-777</td>
<td>G.g. Training and NIH Ext-UAT FOA (Change of Institutional Type)</td>
<td>TYPE7-TRAININGBUDGETON</td>
<td>Use for T15, T32, T34, T35, T36</td>
<td>National Institutes of Health</td>
</tr>
<tr>
<td>PA-EO-777</td>
<td>G.g. Training and NIH Ext-UAT FOA (Change of Institutional Type)</td>
<td>TYPE7-FELLOWSHIP-E</td>
<td>For All Fs Change Of Org Type 7</td>
<td>National Institutes of Health</td>
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<tr>
<td>PA-EN-R01</td>
<td>G.g. Training and NIH Ext-UAT FOA (R01-Clinical Trial N)</td>
<td>FORMS-E</td>
<td>Use for due dates on or after Jan 1, 2021</td>
<td>National Institutes of Health</td>
</tr>
</tbody>
</table>
Check the list BEFORE searching. If the PI is not listed, change the Organization BEFORE searching.
Check all forms to include in the proposal.

<table>
<thead>
<tr>
<th>Your SPO Proposal Analyst goes here.</th>
<th>SF 424 R&amp;R</th>
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<tbody>
<tr>
<td>1. TYPE OF SUBMISSION</td>
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<tr>
<td>Pre-application</td>
<td></td>
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<tr>
<td>Application</td>
<td></td>
</tr>
<tr>
<td>Changed/Corrected Application</td>
<td></td>
</tr>
<tr>
<td>2. DATE SUBMITTED</td>
<td></td>
</tr>
<tr>
<td>3. DATE RECEIVED BY STATE</td>
<td></td>
</tr>
<tr>
<td>State Application Identifier</td>
<td></td>
</tr>
<tr>
<td>5. APPLICANT INFORMATION</td>
<td></td>
</tr>
<tr>
<td>Legal Name</td>
<td>The Regents of the University of California (Davis)</td>
</tr>
<tr>
<td>Department</td>
<td>Office of Research Sponsored Programs</td>
</tr>
<tr>
<td>Street</td>
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<tr>
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<tr>
<td>Country</td>
<td></td>
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<tr>
<td>Person to be contacted on matters involving this application</td>
<td></td>
</tr>
<tr>
<td>Prefix</td>
<td></td>
</tr>
<tr>
<td>Other Name</td>
<td></td>
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<tr>
<td>State/Province</td>
<td>Please Select...</td>
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<tr>
<td>Country</td>
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<td>State/Province</td>
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<td>Phone Number</td>
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<tr>
<td>Tax Number</td>
<td></td>
</tr>
<tr>
<td>Email</td>
<td></td>
</tr>
<tr>
<td>6. EMPLOYER IDENTIFICATION NUMBER(EIN) or (TIN):</td>
<td>1-94603694-A1</td>
</tr>
<tr>
<td>8. TYPE OF APPLICATION:</td>
<td></td>
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<tr>
<td>New</td>
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<tr>
<td>Resubmission</td>
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<tr>
<td>7. TYPE OF APPLICANT:</td>
<td></td>
</tr>
<tr>
<td>H: Public-State Controlled Institution of Higher Education</td>
<td></td>
</tr>
<tr>
<td>Other(Specify):</td>
<td></td>
</tr>
<tr>
<td>Small Business Organization Type</td>
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<td>Women Owned</td>
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<td>Socially and Economically Disadvantaged</td>
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Activity 3: Entering an Application in Cayuse 424

Instruction 01
Login to: https://ucdavis-uat.cayuse424.com
Username: amieadmin
Password: training

Instruction 02
Select Cayuse 424

Instruction 03
Start a Cayuse 424 Proposal based on the scenario on the next page

Instruction 04
Raise your hand (bottom of the Participants list) if you finish before time is up
### Activity 4: Application Scenario

Program Announcement: NIH NIAD PA-EN-R01 (e.g. Training and NIH Ext-UAT FOA Clinical Trial Not Allowed).
Deadline: 7 days from today; Project Dates: 01/1/21 – 12/31/22; SPO Analyst: Kassie M. Obelleiro
IRBnet IDs: 123456, 236589
IACUC Protocol: 2345678

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<th>Line Item</th>
<th>Year 1</th>
<th>Year 2</th>
<th>Total Project</th>
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<td>Salary for Charlie Apple, PI – 3% Effort, 0.36 Person Months ($150,000 Calendar salary)</td>
<td>$4,500</td>
<td>$4,500</td>
<td>$9,000</td>
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<tr>
<td>Salary for Kassie Obelleiro, co-Investigator – 3% Effort, 0.36 Person-Months ($130,000 Calendar salary)</td>
<td>$3,900</td>
<td>$3,900</td>
<td>$7,800</td>
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<td>Salary Total</td>
<td>$8,400</td>
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<td>$16,800</td>
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<td>Charlie Apple, PI</td>
<td>$1,148</td>
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<td>$2,290</td>
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<td>Kassie Obelleiro, co-PI</td>
<td>$995</td>
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<td>Benefits Total</td>
<td>$2,143</td>
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<td>$4,286</td>
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<td>PERSONNEL TOTAL</td>
<td>$10,453</td>
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<td>$12,086</td>
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<td>MRI</td>
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<td>EQUIPMENT TOTAL</td>
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<td>TOTAL DIRECT COSTS</td>
<td>$35,543</td>
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<td>Indirect Cost Base</td>
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<td>Indirect Costs (Rate 57%)</td>
<td>$6,010</td>
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<td>TOTAL PROJECT COSTS</td>
<td>$41,553</td>
<td>$16,553</td>
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Cayuse 424 Routing & Approval

Routing & Approval

Routing Chain

Begin

Apple, Charlie - UC Davis: Med: Int'l Med- Infectious Dise

Obelleiro, Kassie M - UC Davis: OVC - Sponsored Programs

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.

Routing History

<table>
<thead>
<tr>
<th>username</th>
<th>person</th>
<th>type</th>
<th>date/time</th>
<th>comments</th>
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<td><a href="mailto:kassie@ucdavis.edu">kassie@ucdavis.edu</a></td>
<td>Modify 2020-03-11 10:53</td>
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<tr>
<td>amiaadmin</td>
<td>Modify 2020-03-10 11:33</td>
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<td><strong>01</strong> eRA Guidelines</td>
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<td><strong>02</strong> Professional Profiles</td>
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<td>Understand the purpose of a Professional Profile</td>
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<td><strong>03</strong> Maintain Profiles</td>
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<td>Know how to create and update a Professional Profile</td>
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<td><strong>04</strong> Applications</td>
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<td>Know how to submit a proposal in Cayuse 424 and with SPO during review and sponsor submission</td>
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Contact Us

Let us know how we did: http://bit.ly/BAASICS-Eval

Sponsored Programs
Office of Research
University of California, Davis
https://research.ucdavis.edu/proposals-grants-contracts/spo/

Tel: +530 754 7958
Email: kobelleiro@ucdavis.edu

Kassie M. Obelleiro
Training Officer
Resources
Common Acronyms

• AB20: Assembly Bill 20
• BAA: Broad Agency Announcement
• BUA: Biological Use Approval
• CGA: Contracts and Grants Accounting
• COI: Conflict of Interest
• ERA: Electronic Research Administration
• F&A: Facilities & Administrative rates; also referred to as indirect cost rate (IDC or ICR) or “overhead”
• FOA: Funding Opportunity Announcement
• GMS: Grant Management System
• HASTOC: Human Anatomic Specimens and Tissue Oversight Committee
• IACUC: Institutional Animal Care and Use Committee
• IPF: Internal Processing Form
• IP: Intellectual Property
• IRB: Institutional Review Board
  • PI: Principal Investigator
  • RCI: Research Compliance and Integrity
  • RCR: Responsible Conduct of Research
  • RFA: Request for Applications
  • RFP: Request for Proposals
• PHS: Public Health Service
• PRAM: Progress Report Additional Materials (NIH)
• RPPR: Research Performance Progress Reports
• SBIR: Small Business Innovation Research
• SNAP: Streamlined Non-Competing Award Process (NIH)
• SPO: Sponsored Programs unit in the Office of Research
• STTR: Small Business Technology Transfer
Sponsor Resources

- National Institutes of Health (NIH) Application Guide
- National Science Foundation (NSF) Preparing Proposals
- US Department of Agriculture (USDA): “Apply for Grant”
- National Endowment of the Humanities (NEH): “How to Write a Successful Level I DHAG Proposal”
- Links to Other Funding Sources
Cayuse SP and 424

• **UC Davis Cayuse Training**
  • Cayuse 424 Professional Profiles
  • Cayuse SP Interactive How-To Guide
  • Cayuse SP and 424 Handbooks and Video Tutorials
  • Handbook for Role Managers
  • Cayuse Quick Reference
  • Cayuse SP Tips

• **UC Davis Cayuse FAQs**
UC Davis Resources

- Funding Opportunities and Limited Submissions Program, Office of Research
- **Proposal Preparation Checklist**: Applicable to all proposals materials
- Interdisciplinary Research Support (IRS) unit
  - Templates and Samples
- **Call for Proposals Checklist**: Consider using the checklist during review of the sponsor guidelines
- Proposal Preparation and Submission Toolkit
- Senior/Key Personnel Descriptions
- NSF Biosketch Tipsheet
- Preparing a Proposal Budget Toolkit
- Budget Justification Checklist
- Guidance for submitting proposals/IPFs that involve cost sharing
- Cayuse SP Instructions
  - Cayuse SP Quick Reference
  - Cayuse SP Quick Start Guide for Principal Investigators and Departmental Staff
  - Cayuse SP Handbook for Department Contract & Grant Staff, Principal Investigators and Approvers
  - Cayuse SP Interactive How-to Guide Written Instructions
- Subaward Processing Checklist – Departments/Principal Investigators
- Handbook for Submitting a Proposal with Subawards
- Table: Subrecipient, Contractor/Vendor, Consultant?
- Subaward or Contractor (Vendor) Guidance
- Sponsored Programs Research Administration Kiosk (SPARK) Website
Sponsored Programs Contacts

• SPO Contact Us webpage: http://research.ucdavis.edu/contact-us/sponsored-programs/
• Proposals: proposals@ucdavis.edu
• Awards: awards@ucdavis.edu
• Subawards: subawards@ucdavis.edu
• Closeouts: closeouts@ucdavis.edu
• eRA Help: SPOeRAhelp@ucdavis.edu
• Cayuse Help Desk: ORCayuseHelp@ucdavis.edu
• Training: SPOTraining@ucdavis.edu
Office of Research Listservs

• C&G Listserv: https://lists.ucdavis.edu/sympa/info/ovcr-cg
• Other Office of Research Listservs: http://research.ucdavis.edu/resources/listserv-subscriptions/
  • Core Facilities Program
  • Digital Millennium Copyright Act (DMCA)
  • Funding
  • Institutional Review Board (IRB)
  • Research Compliance and Integrity (RCI)
  • Responsible Conduct of Research (RCR)
  • Research Unit Lists
• SPARK: https://lists.ucdavis.edu/sympa/subscribe/spark_i
### Research Administration Forum

**FOURTH WEDNESDAY OF EACH MONTH**
8:30 – 10:00 AM

**ZOOM:** HTTPS://ZOOM.US/JO95849717

*No in person meeting until further notice due to Coronavirus '19*

Join us via Zoom the **fourth** Wednesdays at 8:30 am!

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**Subscribe to the C&G listerv for updates and reminders:**
https://lists.ucdavis.edu/sympa/info/cscr-cg

**Additional meeting in April and May due to COVID-19**

Watch previous forums on YouTube
Live and Recorded Learning Opportunities

SPO BAASICS
Budget, Application, Award and System Instruction for Comprehensive Skills (BAASICS) are training sessions designed to help contract and grant administrators at UC Davis build and hone their research administration skills.
Learn more

Staff Development and Professional Services Classes
SPO offers classes in the Research Administration Certificate Series (RACS) and the eRA Train the Trainer certificate series.