

Cayuse 424 Lab Scripts

May 10, 2018

Cayuse 424 Professional Profile

1. Login to Cayuse 424
 - a. Go to <https://ucdavis.cayuse424.com>.
 - b. Login with your Kerberos information.
 - c. Select "Cayuse 424".
2. Select "Professional Profile".
3. Find your profile.
 - a. Enter your last name in the text field.
 - b. Select "The Regents of the University of California (Davis)" in the dropdown below.
 - c. Select Search next to your last name.
 - d. Select your name.
4. Go to Permissions (the key in the top left corner).
 - a. Select "Add User" to give someone else permission to your profile.
 - b. Select the appropriate checkboxes to set their permission level.
5. Select your name on the top of the page.
6. Enter your NIH Commons ID.
7. Add your Degrees if you wish.
8. Add your eRA roles.
9. Select your Dept/Division if incorrect. (Note: For Investigators, this should be the unit code associated with grants and contracts; not payroll if they are different.)
10. Enter your Employee ID on the Salary and Fringe Worksheet.
11. Add your Performance Site. (Note: Can select "Fill from Contact/Org Info".)
12. Set up you Routing Profile to have the same Routing and Approval Chain populate for proposals. (Note: Consider adding your regular SPO proposal analyst to the investigator's profile.)
 - a. Select "Next Reviewer".
 - b. Enter the person's last name and select "Search".
 - c. Select the person's name.
 - d. Select "Set Next Reviewer".
 - e. Select "Close".
13. Select "People".

Cayuse 424 Proposal/Application

1. Go to "Opportunities".
 - a. Enter "RFA-FD-18-022" in the text field and select "Search".
 - b. Select the plus sign to create a proposal.
2. Complete the pop-up window.
 - a. Enter the Proposal Title (internal identifier): If you have a Cayuse SP number, start with that.
 - b. Add the PI.
 - i. Enter "User, Test" in the text field and select "Search."
 - ii. Select "User, Test" from the PI list.
 - c. Organization: The Regents of the University of California (Davis)
 - d. Select the Default IDC Rate: On Campus Org Research MTDC
 - e. Select the # of Budget Periods: 2
 - f. Select the Due Date: 05/25/2018
 - g. Select the Validation Type: NIH (Note: The correct validation type should populate based on the selected opportunity.)
 - h. Select "Create Proposal".
3. Complete SF424 RR Page 1.
 - a. Select the Type of Submission: Application
 - b. Add the Admin Contact by selecting the pencil icon next to "Person to be contacted on matters involving this application". (Note: This should be the SPO analyst.)
 - i. Enter your usual SPO proposal analyst's last name. For this class, select Marlene Mooshian or Pat Bell.
 - ii. Select the SPO analyst's name.
 - iii. Select "Add Applicant Contact".
 - c. Select the Type of Application: New
 - d. Enter the Descriptive Title of the Application
 - e. Enter the Proposed Project Start and End Dates by selecting the calendar icon and then completing the pop-up window.
 - i. Select the number of period: 2 years
 - ii. Select the Period Length: 1 year
 - iii. Enter the start date of the first project period: January 1, 2019
 - iv. Select "Update Periods".
4. Complete SF424 RR Page 2.
 - a. Indicate if the application is subject to review by State Executive Order 12372 Process (will be indicated in the solicitation): No - PROGRAM IS NOT COVERED BY E.O. 12372 (for this class)
 - b. Select "I agree" to 17 (the PI should do this).
 - c. Add the AOR by selecting the pencil icon next to "Authorized Representative".
 - i. Enter your usual SPO proposal analyst's last name. For this class, select Marlene Mooshian or Pat Bell.
 - ii. Select the SPO analyst's name.
 - iii. Select "Add Authorized Representative".
5. Complete RR Other Project Information page.
 - a. Answer each question.
 - b. Upload the Project Summary/Abstract.
 - c. Upload the Project Narrative.

6. Complete the RR Budget Page 1.
 - a. Enter the PI's Cal Months: 12-month appointment with 3% effort = .36 Person Months
 - b. Enter Other Personnel as follows:
 - i. Two GSRs for both project periods.
 - a. Academic Months: 3
 - b. Requested Salary: 39,000
 - c. Fringe Benefits: 15,000
 2. One Secretarial/Clerical staff member for both project periods.
 - a. Calendar Months: 12
 - b. Requested Salary: 45,000
 - c. Fringe Benefits: 20,000
 - ii. Select the staircase at the top of the page to replicate and/or escalate entries.
 1. Choose "Select All" at the bottom of the page.
 2. Change the End Period to "Budget Period 2".
 3. Select "Replicate Selected Categories".
 4. Select "Escalate Selected Categories".

Note: We are skipping the other budget pages for this activity.

7. View the PHS Human Subjects and Clinical Trials Information page.
8. View the PHS 398 Cover Page Supplement.
9. View the PHS 398 Research Plan.
10. View the PHS Assignment Request.
11. Grant Permissions to those who need access.
 - a. Select Permissions.
 - b. Add Users and grant access levels.
12. Set up the Routing Chain
 - a. Select Routing & Approval.
 - b. Enter your usual SPO proposal analyst's last name. For this class, select Marlene Mooshian or Pat Bell.
 - c. Select the SPO analyst's name.
13. Select the Error/Warning bar.