Cayuse 424

Presented by the UC Davis Sponsored Programs Office (SPO)

February 27, 2025

Learning Objectives

By the end of this training, you will hopefully…

Know the general proposal submission process
- For some, this will be a refresher

Know how to prepare and submit a proposal in Cayuse 424

Know how to create and update a Professional Profile (in Cayuse 424)

Helpful resource: SPO Key Terms *(abbreviations and definitions)*

Training Modules

1. Proposal Submission Process

2. Cayuse 424 Proposals

3. Cayuse Professional Profiles

4. Resources

PROPOSAL
SUBMISSION
PROCESS

Proposal Submission Process

PROPOSALS ARE A TWO-STAGE PROCESS

1. Cayuse SP: Route Internal Processing Form (IPF) for required internal (UCD) approvals

2. Cayuse 424 or other eRA system: Submit proposal to sponsor

1ST STAGE:

All outgoing proposals must first be routed in Cayuse SP. Exceptions:
- Pre-proposals that do not require a budget, institutional signature or adherence to terms and conditions at the proposal stage
- Applications to internal programs (Academic Senate, Campus Research Initiatives, Limited Submissions)

PI (w/ dept assist) **prepares and routes IPF** with required attachments
- **PIs and Co-PIs certify** proposal
- **Dept Head** (Chair or Director) **authorizes** it
  - **Dean's Office too** in Schools of Medicine and Veterinary Medicine
- **Sponsored Programs Office (SPO) performs institutional review** for regulatory compliance and adherence to UC policy

Proposal Submission Process

PROPOSALS ARE A TWO-STAGE PROCESS

1. Cayuse SP: Route Internal Processing Form (IPF) for required internal (UCD) approvals

2. Cayuse 424 or other eRA system: Submit proposal to sponsor

2ND STAGE:

The sponsor's Funding Opportunity Announcement will indicate what eRA submission system(s) may be used.

- Read the guidelines carefully and thoroughly
    - Follow links in document to agency-specific guidelines to ensure you are compliant with all requirements
- Some sponsors require submission by email or mail

PI (w/ dept assist) **prepares proposal** for submission to sponsor

- **SPO reviews** for campus & sponsor compliance
- In most cases, **SPO submits** proposal to sponsor

Proposal Routing and Submission Timeline

~10-14 workdays before deadline		5-7 workdays before deadline		2-3 workdays before deadline	1-2 workdays before deadline
PI's team **prepares & routes** IPF (+ attachments)* in **Cayuse SP**	PI's team copies proposal into **Cayuse 424** or **other submission system**. If other, provide SPO access	Approved IPF arrives in SPO. Proposal is provided to SPO via **Cayuse 424** or access in other system	SPO Initial Review Assigned analyst reviews proposal in both Cayuse SP and submission system	PI/Dept incorporates SPO feedback PI/Dept finalizes proposal package **	Final proposal submitted to sponsor SPO submits most electronic proposals

* Minimum attachments: **Scope of work**, **budget**, and **budget justification**. Other attachments may also be required.
- The **scope of work can be a draft** with the final version provided later.
- The PI's team may work on other documents for submission, such as the **project narrative** or **biosketches**, until closer to the deadline.

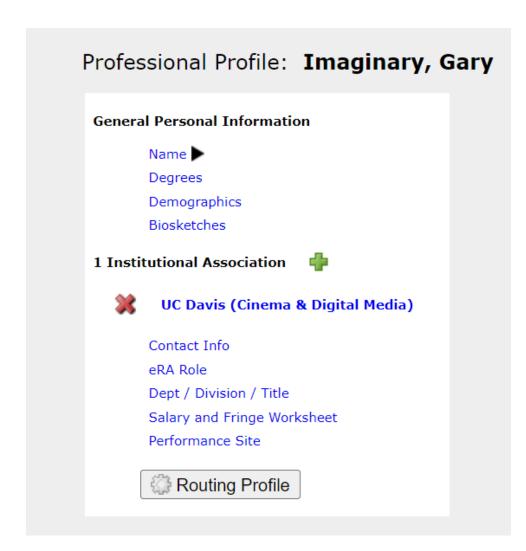** This is when PI and their team should **provide final attachments**.

Cayuse 424

Cayuse 424 is in the process of being rebranded as **Cayuse Proposals (S2S)**

- If a sponsor's guidelines allow submission through either **Grants.gov** or **system-to-system (S2S)**, you must use **Cayuse 424**.
  - Cayuse 424 is linked system-to-system to Grants.gov, the submission system for <u>most</u> Federal agencies.

  - **Excluded** from Cayuse 424:
    - NSF uses Research.gov
    - NASA uses NSPIRES

  - Using Cayuse 424 speeds the review process.
    - It allows your assigned SPO analyst to access your proposal without you having to manually provide access in Grants.gov.
    - Professional and institutional profile information can auto-populate.
    - Can check errors and warnings at any time
    - Allows multiple users to view the proposal simultaneously (while one person at a time edits).
    - Can copy proposals for resubmission, reducing data entry.
    - 424 stores documents relevant to the proposal, facilitating file search and communication.
    - 424 automatically integrates subaward budgets and personnel information with a prime proposal.

Cayuse 424 hosts Professional Profiles

Professional Profile: **Imaginary, Gary**

General Personal Information

> Name ▶
> Degrees
> Demographics
> Biosketches

1 Institutional Association ✚

> ✖ **UC Davis (Cinema & Digital Media)**

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

⚙ Routing Profile

Professional Profiles contain **salary**, **appointment**, and **unit affiliation** for everyone in the Cayuse Research Suite.

- These details import into both Cayuse SP IPFs and Cayuse 424 proposals.

Professional Profiles will be covered in more detail later in this training.

Cayuse 424

Information entered into a Cayuse SP IPF doesn't automatically populate in a Cayuse 424 proposal.

While Cayuse SP appears to have an option to pair the two systems, this feature creates technical issues downstream. **Do not pair proposals.**

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

Instead, you will need to duplicate into 424 the content you put into SP.
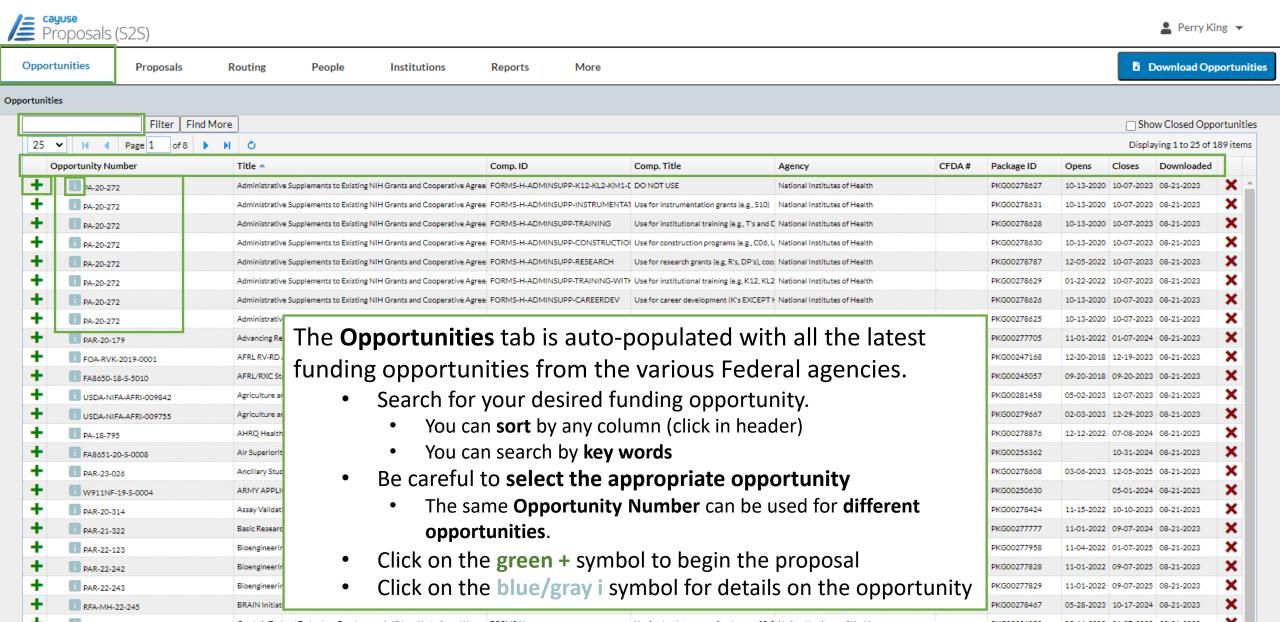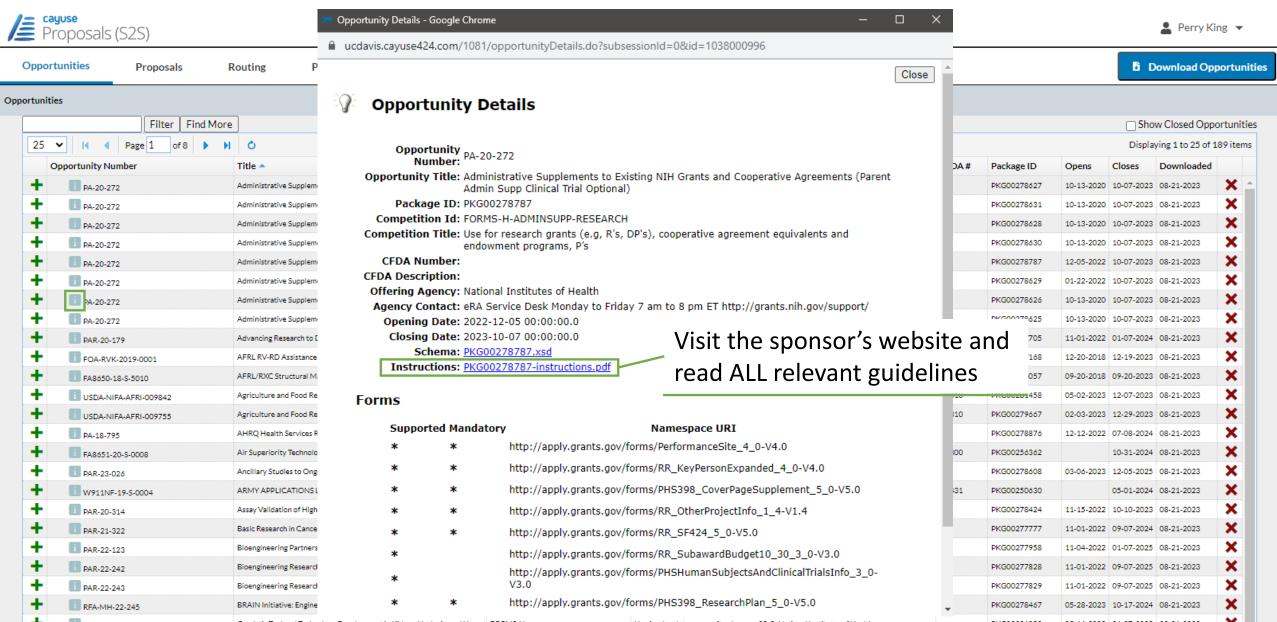
CAYUSE 424 PROPOSALS

Cayuse 424 Front Page

1. **Opportunities:** Find a sponsor's funding opportunity to begin your application
2. **+ Create Proposal:** Click here to prepare a proposal in which **UC Davis is a subrecipient** and the **other institution uses Cayuse.**
3. **Proposals:** Find a proposal you or a PI have already created
4. Select the **Proposal name** to edit
    - Select **R** to view as read-only. This will allow others to edit the proposal while you review it.
    - Select the **green papers** to **copy** the proposal or to **transform** it to a different funding opportunity.
    - Select the **red X** to delete the proposal
5. **People:** Allows you to manage Professional Profiles

Opportunities Tab

The **Opportunities** tab is auto-populated with all the latest funding opportunities from the various Federal agencies.
- Search for your desired funding opportunity.
  - You can **sort** by any column (click in header)
  - You can search by **key words**
- Be careful to **select the appropriate opportunity**
  - The same **Opportunity Number** can be used for **different opportunities**.
- Click on the **green +** symbol to begin the proposal
- Click on the **blue/gray i** symbol for details on the opportunity

Opportunities Tab

Opportunities Tab

Not common:
- If a Federal opportunity you seek is not on the list, click **Download Opportunities** in the upper right.
- You can search by the fields indicated below.
    - Or select the **Search For Opportunities** link to search by title.
- Your downloaded opportunity will then appear within the **Opportunities** tab.

If the opportunity is not found, please email orcayusehelp@ucdavis.edu for assistance.

Start a Proposal

- When you select an opportunity's **green +** symbol, the pop-up at right will appear
- The **Proposal Name** is not the project title. It is used for informational purposes and ideally should include:
  1. The related **Cayuse SP proposal number**
     - This allows SPO to connect the two
  2. The **PI's name**
  3. The **Funding Opportunity Number**
     - Example: 24-5555 Apple PA-20-272

Start a Proposal

- Before you **Search for PI**, check to see if the PI's name already appears at the **Principal Investigator** field. If there, simply click on it.
  - If the name isn't there, do two things:
    1. Enter the **PI's last name** in the empty search field
    2. Enter the **Organization**.
       - For UC Davis, select **The Regents of the University of California (Davis)**
       - This will limit and speed the search.
  - Now click **Search for PI.**

Start a Proposal

- Before you **Search for PI**, check to see if the PI's name already appears at the **Principal Investigator** field. If there, simply click on it.
  - If the name isn't there, do two things:
    1. Enter the **PI's last name** in the empty search field
    2. Enter the **Organization**.
       - For UC Davis, select **The Regents of the University of California (Davis)**
       - This will limit and speed the search.
  - Now click **Search for PI**
- Once the PI's name appears in the **Principal Investigator** field, **click it** to select it.

Start a Proposal

- The **Default IDC** (Indirect Cost) **Rate** field will appear. If unsure which rate to pick, a common one for research projects is **On Campus Org Research MTDC**
  - MTDC = Modified Total Direct Costs

- The **Validation Type** will usually autopopulate based on the opportunity you select.

- When ready, click **Create Proposal** to continue.

CGA page: [On-Campus vs. Off-Campus F&A (Indirect Cost) Rates](#)

Activity 1: Start a Proposal in Cayuse 424

- Login to Cayuse "sandbox" (UAT): https://ucdavis-uat.cayuse424.com *(copy from Zoom chat)*
  - Username: amieadmin   Password: training

1. Select **Cayuse 424**

2. Search for Opportunity: **PA-HO-777 for R01 [NIH]**

3. Select the green **+** symbol to begin proposal

   - Scenario details on next screen

- If you're unable to access the UAT:
  - *You may want to screenshot this info*
  - Use actual **Cayuse 424** (https://ucdavis.cayuse424.com/)
  - Search for Opportunity: **PA-20-272 (for R's)**
  - Proposal Name: **25-5555 Carter PA-20-272 (for training purposes)**
  - PI: **Cameron Carter** *(you'll need to overwrite auto-populated salary/fringe)*
  - Co-PI: **Jeff Gibeling**   "

Activity 1: Start a Proposal in Cayuse 424

Use the information below to complete the pop-up (**Create Grants.gov Proposal**). When done, click **Create Proposal.**

Keep the next screen open – don't close out of it or exit Cayuse 424. We'll be populating the full proposal as we go.

Type **done** in chat so we know we can proceed.

RFA: PA-HO-777 R01 [NIH]
Proposal Name: Cayuse SP Proposal # [*use 25-5555*] Apple PA-HO-777 R01
PI: Charlene "Charlie" Apple
Project Title: Socio-ecological factors in Malaria transmission
Sponsor Deadline: 1/7/26 (5pm local time)
Project Dates: 5/1/2026 – 4/30/2028
Applicant Info: The Regents of the University of California (Davis)* Sponsored Programs Office, 1 Shields Ave. Davis, CA 95616-5270
Location of activity: Lawrence J. Ellison Ambulatory Care Center
4860 Y St., Sacramento, CA 95817-2307
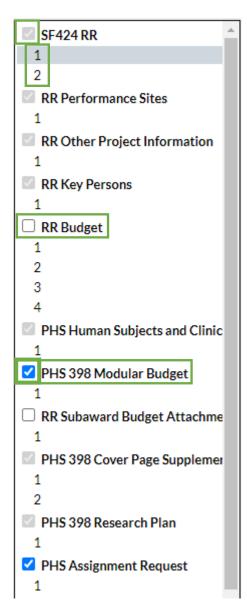
* Full legal name is actually **The Regents of the University of California, on behalf of its Davis campus**
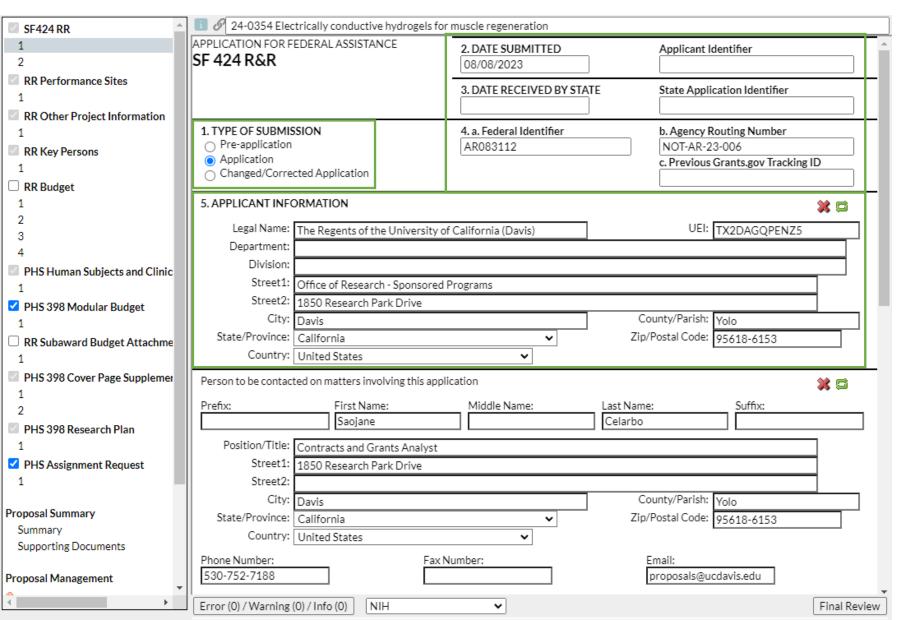
Completing a Proposal

- As with Cayuse SP, you **navigate** through the various pages of the proposal **in the left column**.

- Each greyed out checkbox indicates an application form required by the sponsor.
  - Note that several forms are more than one page in length.
  - You can add optional forms to your proposal by adding a checkmark in the form's empty box.

- For certain types of NIH funding opportunities, when the **total direct costs being requested are $250,000 per year or less,** NIH requires the applicant submit a **simplified modular budget**.
  - In these cases, as shown, add a check next to the (PHS 398) **Modular Budget** form and remove the check from **RR Budget**.
    - Complete the **Modular Budget** rather than the more detailed **RR Budget**

Completing a Proposal *(1st page)*
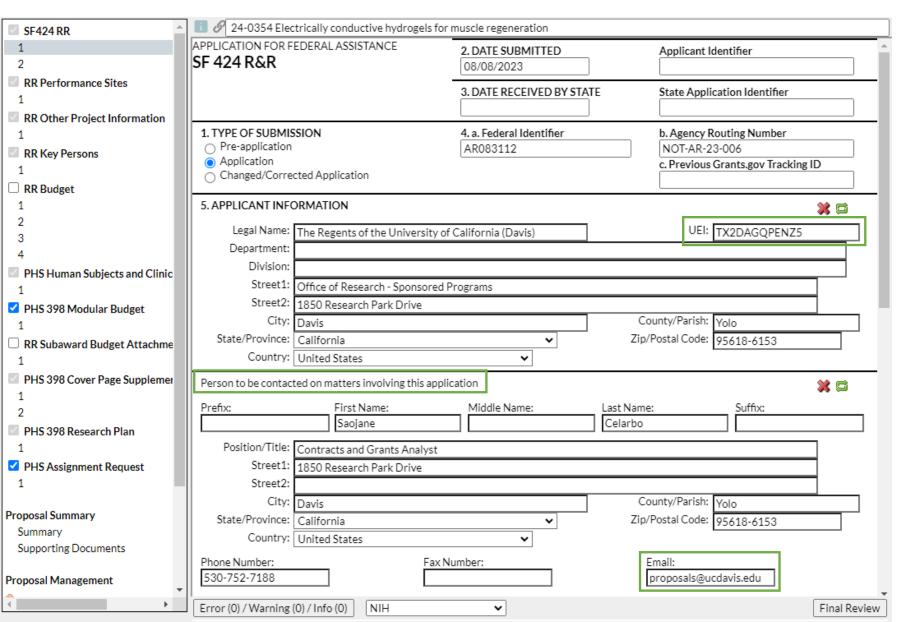
Note: the forms in the left column vary by sponsor/funding opportunity. This presentation will cover typical forms.

Though it's not obvious, there is nothing to add at this time to sections 2, 3 or 4.

1. **Type of Submission:** Select appropriate entry

5. **Applicant Information**: The university is the applicant - The Regents of the University of California (Davis)

- As the SPO office has moved, use **1 Shields Avenue, Davis, CA 95616-5270** as the address

Completing a Proposal *(1st page)*
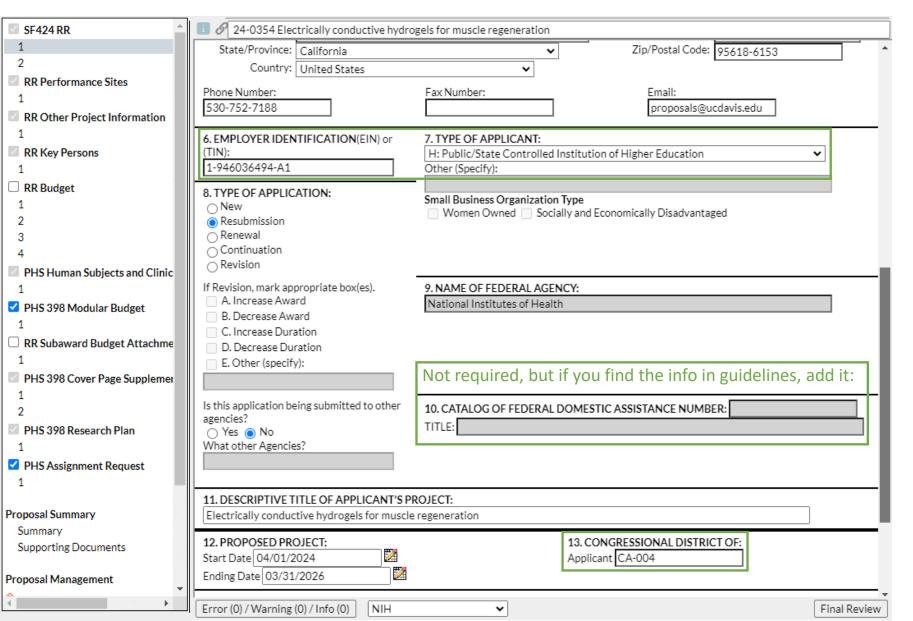
The **Unique Entity Identifier (UEI)** is found on the UC Davis **Institutional Information** page.
- This is a good page to bookmark

Person to be contacted on matters involving this application: Enter **your assigned SPO Proposals Analyst**.
- If the IPF is still routing in Cayuse SP and an analyst isn't yet assigned, enter what you can and add the name later.
- Good email to use here: **proposals@ucdavis.edu**
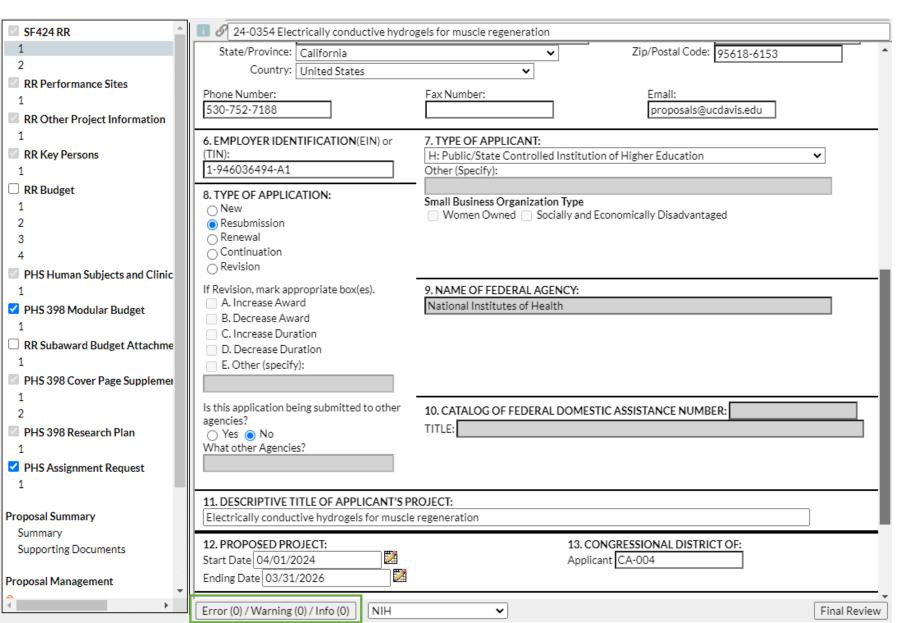
Completing a Proposal *(bottom half of 1ˢᵗ page)*

Again, use the **Institutional Information** page to populate:
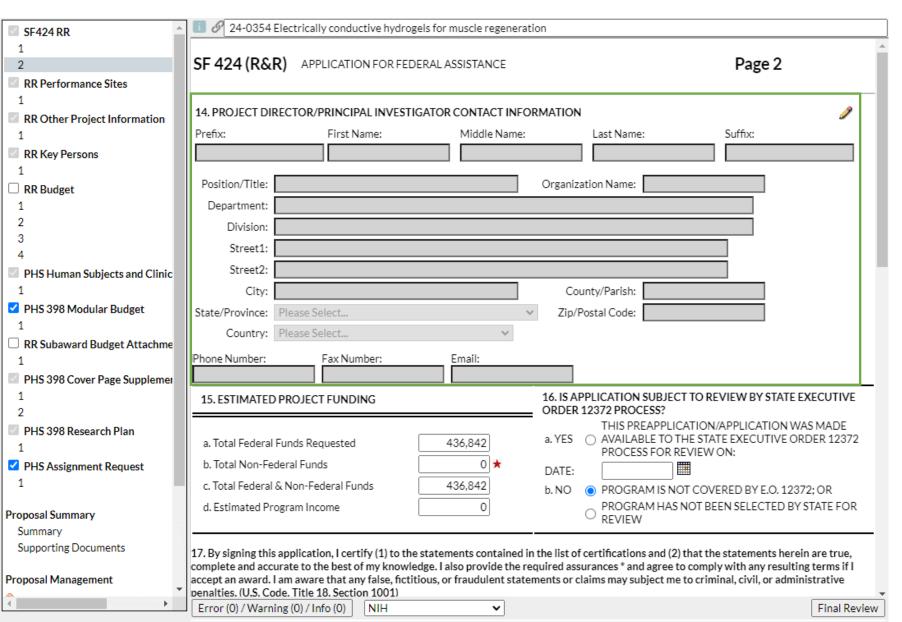
   6. **EIN/TIN**

  13. **Congressional District**

7. **Type of Applicant:** UC Davis is a "Public/State Controlled Institution of Higher Education."

Completing a Proposal *(bottom half of 1ˢᵗ page)*

At the bottom of the form is a **box that shows errors and warnings**.

- Click on it to see errors and warnings that may prevent a successful proposal submission.
  - Links take you to the indicated error/warning for correction.

- Some errors or warnings may be **"false" errors** based on a standard sponsor application and not your specific funding opportunity.
  - Please check with your SPO analyst if you have any questions as to whether a particular error or warning can be ignored.

Completing a Proposal *(2nd page)*
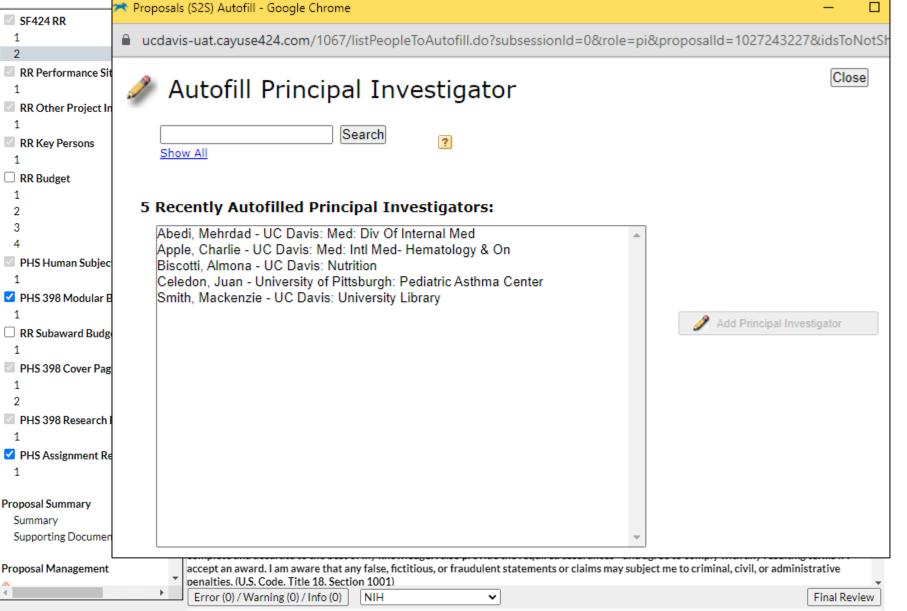
14. Project Director/PI

Select the ✏ pencil icon to auto-populate this section from the PD's/PI's Professional Profile (in Cayuse 424).
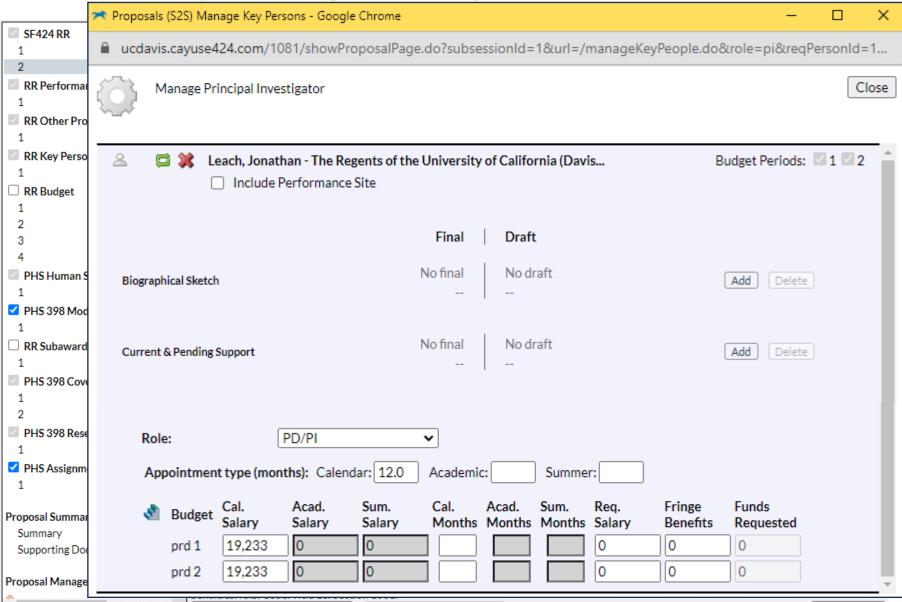
*Note: You can either add the PD/PI here or to the **RR Key Persons** form. Populating either will populate both.*

You can manually update auto-populated fields as needed.

Completing a Proposal *(2nd page)*

14. **Project Director/PI**

After you select the pencil icon, either search for the PI (by last name) or select from a list of recently autofilled PIs.

Completing a Proposal *(2nd page)*

14. **Project Director/PI**

You then have the following options:
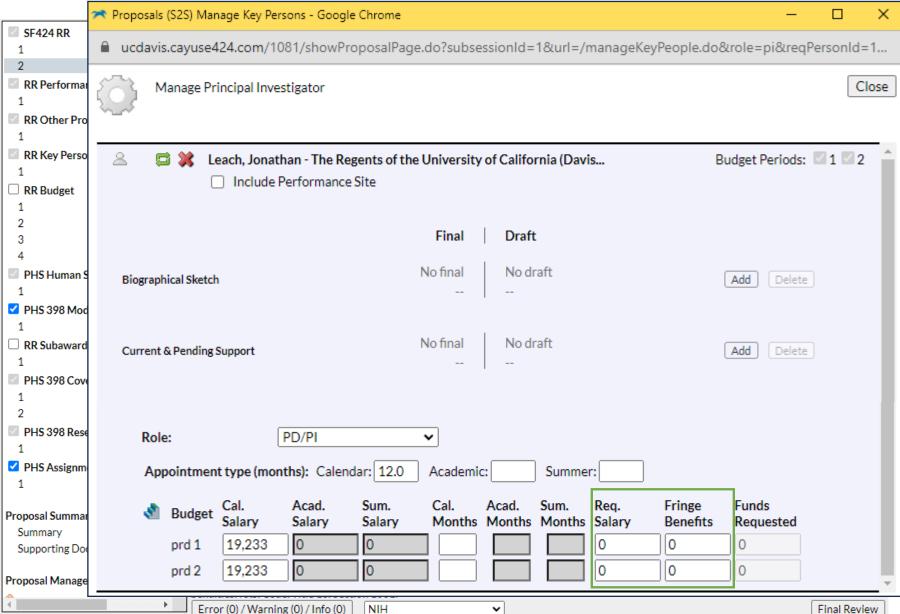
- **Include Performance Site** (autopopulated from Professional Profile)
- Change **Role**, though you rarely do this for the PD/PI. Other options:
  - Co-PD/PI
  - Other Senior Personnel
- Revise their (autopopulated) **appointment type**, **salary**, and **effort**.
  - Effort: enter portion of calendar, academic or summer months they will dedicate to the project.

Completing a Proposal *(2ⁿᵈ page)*
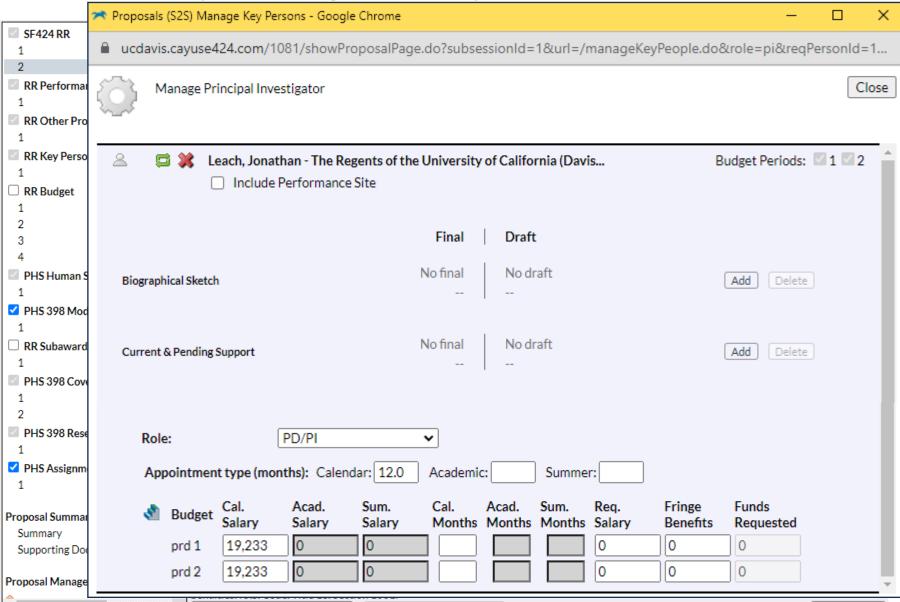
14. **Project Director/PI**

Important:
The automatic **salary** and **fringe** totals in Cayuse 424 <u>always</u> need to be overridden manually.
- They don't use any split rate fringe and rarely match the internal budget.

Update these figures as needed to match the internal budget.

Completing a Proposal *(2nd page)*
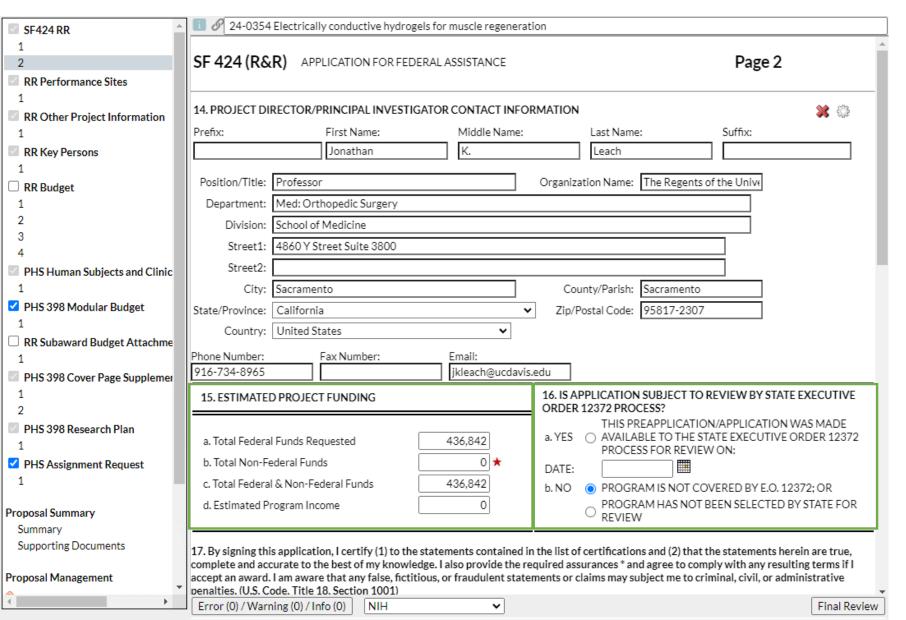
If you **overwrite** an auto-calculated value, a **red star** will appear.

Use caution when overwriting calculated fields.
- **Overwritten values will not update** when you update related fields.
    - **This can cause final values to be wrong.**
- To return a red star field to its auto-calculated value, delete your manual entry.

Completing a Proposal *(2nd page)*

15. **Estimated Project Funding**:
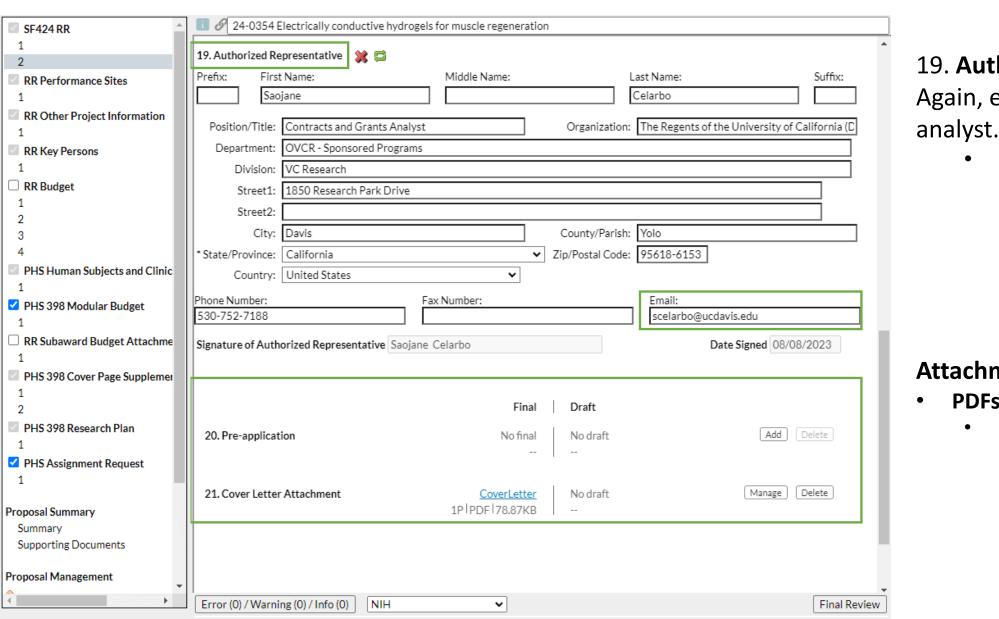
There is **no need to populate the budget figures here**, as these fields are autopopulated when you complete the **RR Budget** pages.

16. **State Exec Order 12372:**

Check sponsor guidelines for answer.
- Example: the **NIH SF424 (R&R) Application Guide** reads "Applicants should check '**No, Program is not covered by E.O. 12372**.'"

Completing a Proposal *(bottom half of 2nd page)*

19. **Authorized Representative**: Again, enter your assigned SPO analyst.
- Good email to use here: your **SPO analyst's direct email**.

Attachments in Cayuse 424:
- **PDFs** are generally preferred.
  - Check sponsor guidelines to make sure non-PDFs are allowed and/or requested.
    - NIH, for instance, only allows PDFs, but some sponsors may request a Powerpoint or Excel.

Activity 1 continued: SF424 RR Form

Use the information below to complete form **SF424 RR**. When complete, type **done** in chat so we know we can proceed.

Proposal Name: Cayuse SP Proposal # 25-5555 Apple PA-HO-777 R01

Project Title: Socio-ecological factors in Malaria transmission

Sponsor Deadline: 1/7/26 (5pm local time)

Project Dates: 5/1/2026 – 4/30/2028

Applicant Info: The Regents of the University of California (Davis)* Sponsored Programs Office, 1 Shields Ave. Davis, CA 95616-5270

Person to be Contacted/Authorized Representative: SPO Proposal Analyst Amie Admin.

1 Shields Ave. Davis, CA 95616-5270.

530-574-5555 proposals@ucdavis.edu & aadmin@ucdavis.edu

Location of activity: Lawrence J. Ellison Ambulatory Care Center, 4860 Y St., Sacramento, CA 95817-2307
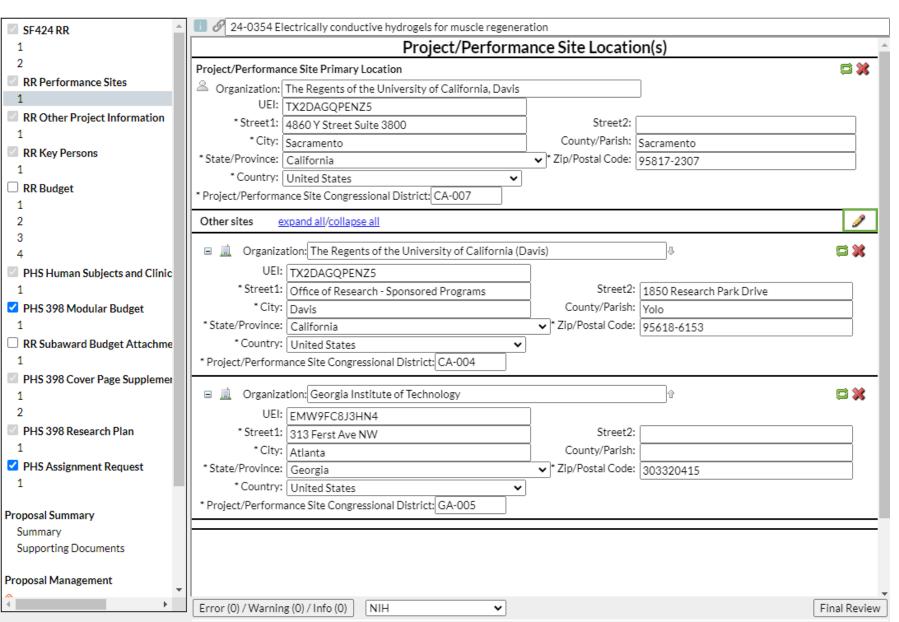
Helpful link: Institutional Information

Line Item	Year 1	Year 2 (+3%)	Total Project
Salary for Charlie Apple, PI – 3% Effort, 0.36 Person-Months ($150,000 Calendar salary)	$ 4,500	$ 4,635	$ 9,135
Salary for Gary Imaginary, Co-PI – 3% Effort, 0.27 Person-Months ($130,000 AY salary)	$ 3,900	$ 4,017	$ 7,917
Salary Total	**$ 8,400**	**$ 8,652**	**$ 17,052**
Charlie Apple, PI Fringe Benefits	$ 1,241	$ 1,315	$ 2,556
Gary Imaginary, Co-PI Fringe Benefits	$ 1,626	$ 1,727	$ 3,353
Benefits Total	**$ 2,867**	**$ 3,042**	**$ 5,909**
PERSONNEL TOTAL	**$11,267**	**$11,694**	**$22,961**

* Full legal name is actually **The Regents of the University of California, on behalf of its Davis campus**
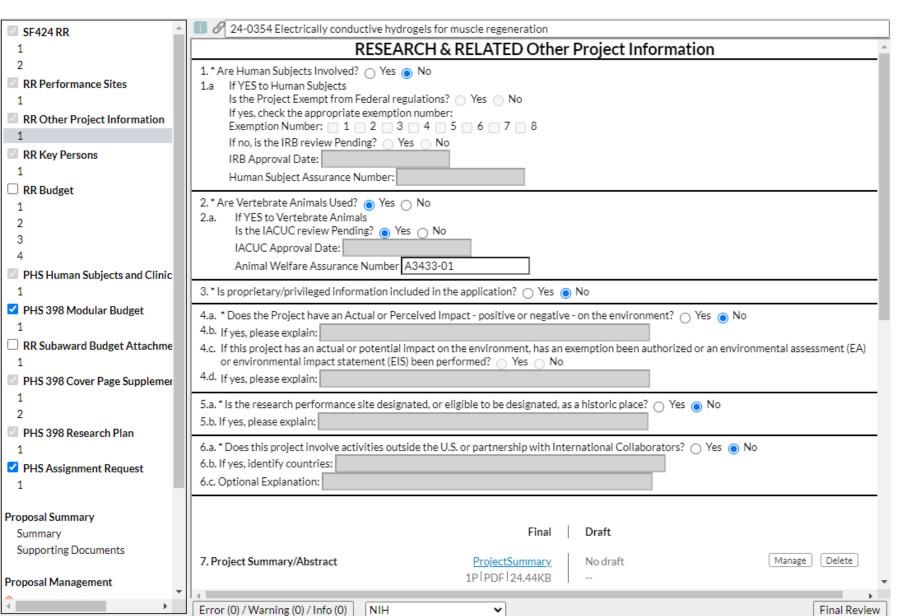
Completing a Proposal *(RR Performance Sites page)*

Enter the location(s) where project work will be performed.

Click the **pencil icon** to add or remove Performance Sites.
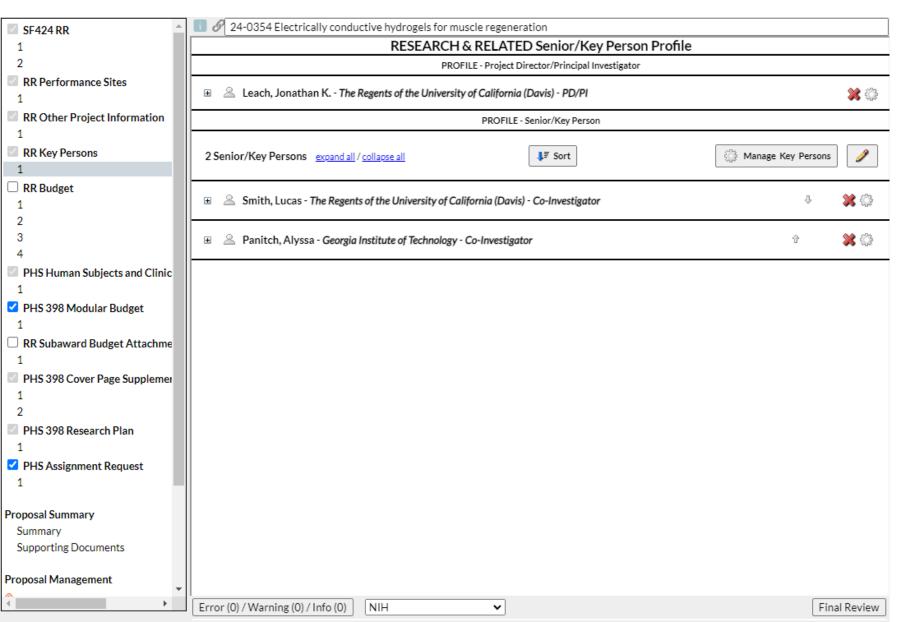
Completing a Proposal *(RR Other Project Information)*

The PI should have the answers to these questions.
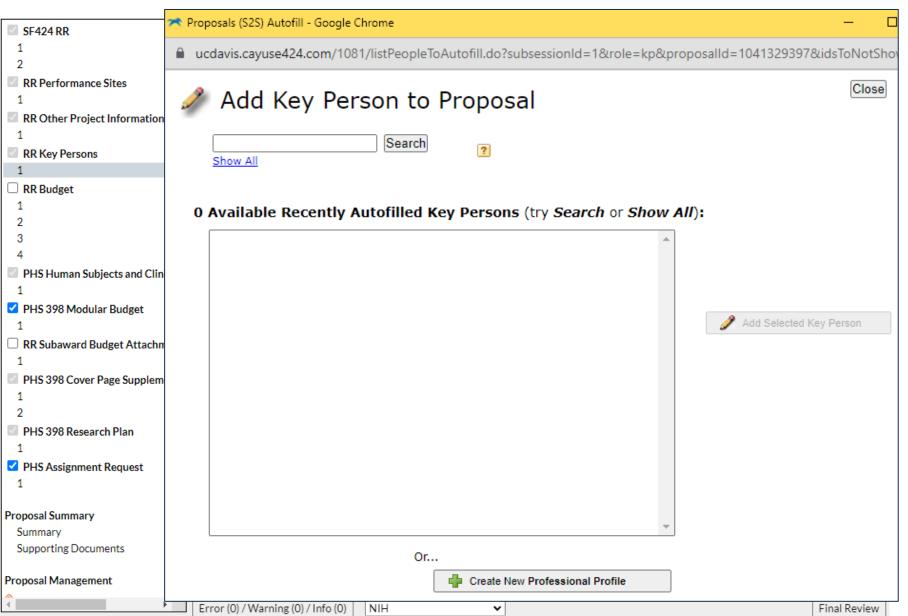
If human or animal subjects are involved and no IRB/IACUC review is pending, the protocols should be submitted for review to ensure they are in place should the proposal be awarded.

There are fields at the bottom of this page to attach a range of documents.

Completing a Proposal *(RR Key Persons)*

As mentioned before, a PI added earlier will show up here.

Click the pencil icon to add additional Co-PIs or Senior Personnel.

Completing a Proposal *(RR Key Persons)*
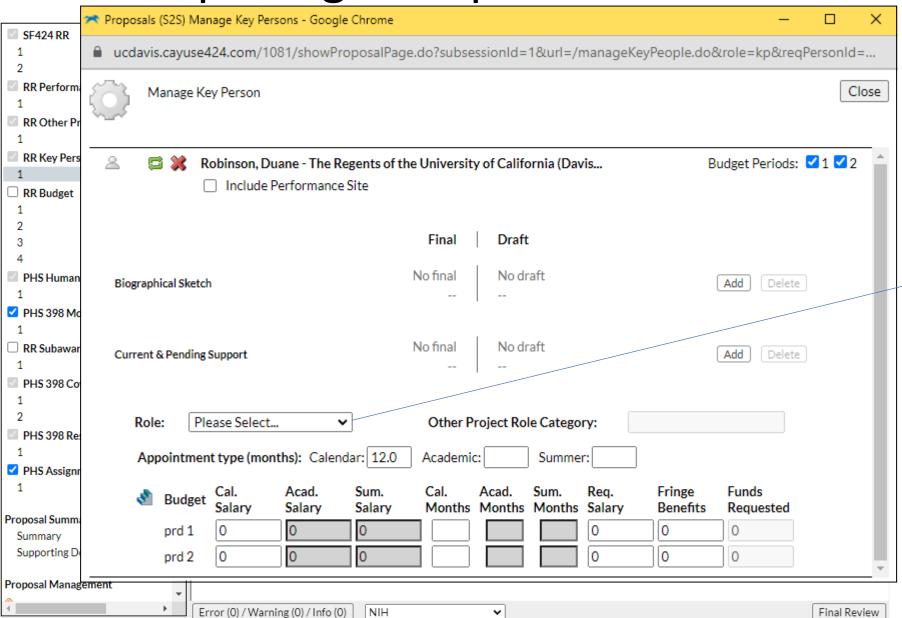
This stage is similar to adding a PD/PI.

At bottom is an option to **Create New Professional Profile**. Only do this for personnel who are NOT at UC Davis.

To request a Professional Profile for someone at UC Davis, write ORCayuseHelp@ucdavis.edu.
  • We'll cover in later slides what info you should provide.

Completing a Proposal *(RR Key Persons)*
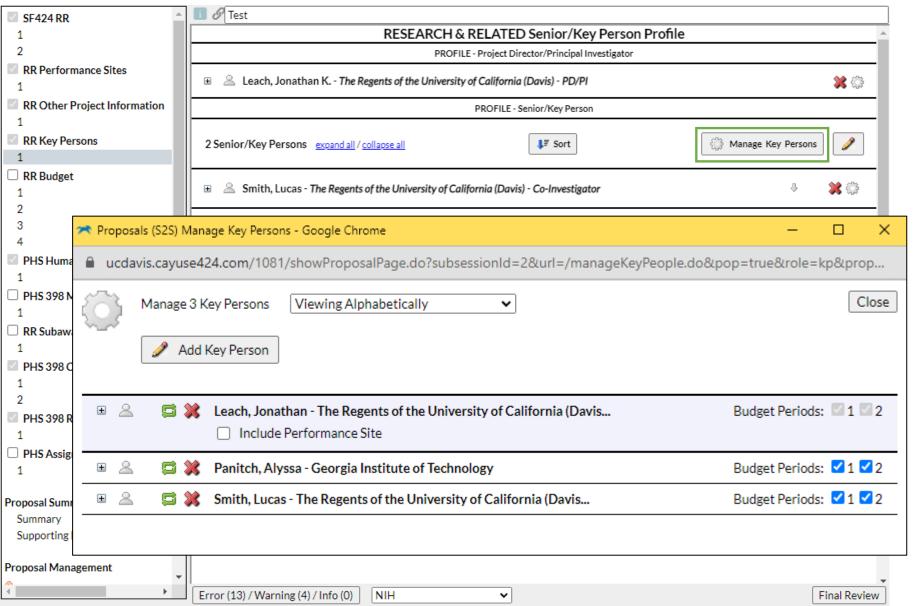
You can make the same edits as for a PD/PI, and additionally select which **Budget Periods** this key person will participate in.

Role: There are far more options here than for the PD/PI:

- For NIH: Do <u>not</u> select **Other Professional**

Completing a Proposal *(RR Key Persons)*

To edit effort for personnel already added to the proposal, select **Manage Key Persons**.

These are available options:

- ⊞ (Re)visit effort screen
- 👤 Visit Professional Profile
- 🔁 Re-autofill from Profile
- ❌ Remove from proposal

Activity 1 continued: Next 3 Forms

Use the information below to complete the **RR Performance Sites**, **RR Other Project Information**, and **RR Key Persons** forms.

When complete, type **done** in chat so we know we can proceed.

Location of activity: Lawrence J. Ellison Ambulatory Care Center, 4860 Y St., Sacramento, CA 95817-2307
IRB Application #: 00004557, approved 2/10/25
IACUC Protocol: A3433-01, approved 2/1/25 (bovine)
Other Project Info questions you don't have the answers to: *Assume you need to check with PI*
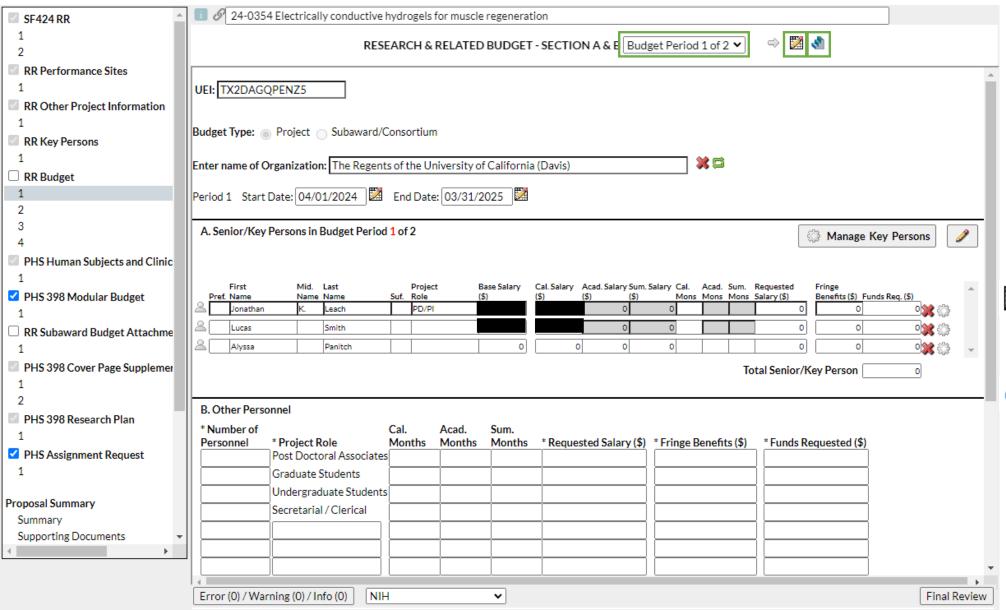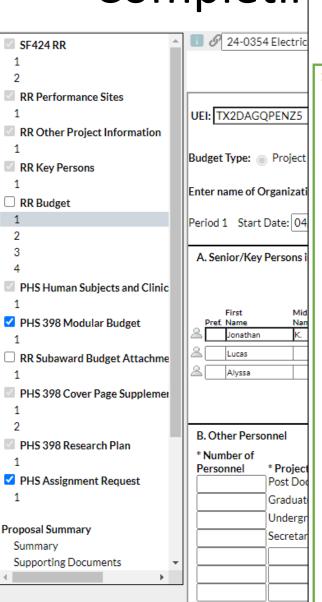
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PERSONNEL TOTAL	**$11,267**	**$11,694**	**$22,961**

Completing a Proposal *(RR Budget page 1)*

RR Budget:
- Note that the budget page is for the first budget period only.
  - You have to select **Budget Period 2 of 2** or the grey arrow icon ⇨ to make entries for the 2nd budget period.

Budget Period Editor: Add/delete/change budget periods

Stair icon: Once you populate Budget Period 1, use this to **replicate** your entries into future budget periods or to add **escalations**.

Completir

Budget Replication or Escalation - Google Chrome

🔒 ucdavis.cayuse424.com/1081//dialogs/budgetEscalationDialog.jsp?subsessionId=2&budgetType=RR_Budget_Long

Budget Replication or Escalation

Enabled	Budget Category to Escalate/Replicate	Rate (%)
☐	A.) Senior/Key Persons - Salary	3.0
☐	Senior/Key Persons - Fringe Benefits	
☐	B.) Other Personnel - Salary	3.0
☐	Other Personnel - Fringe Benefits	3.0
☐	D.) Travel	3.0
☐	E.) Participant/Trainee Support Costs	3.0
☐	F.1) Materials and Supplies	3.0
☐	F.2) Publication Costs	3.0
☐	F.3) Consultant Services	3.0
☐	F.4) ADP/Computer Services	3.0
☐	F.5) Replicate Indirect Cost Type for Subaward Costs Allocated to IDC Base	
☐	F.6) Equipment or Facility Rental/User Fees	3.0
☐	F.7) Alterations/Renovations/Construction	3.0
☐	F.8) Other 1	3.0
☐	F.9) Other 2	
☐	F.10) Other 3	
☐	F.11) Other 4	
☐	F.12) Other 5	
☐	F.13) Other 6	
☐	F.14) Other 7	
☐	F.15) Other 8	
☐	F.16) Other 9	
☐	F.17) Other 10	

select all | unselect all

Start Period:
Budget Period 1 ▾ thru End Period: Budget Period 2 ▾
Budget Period 1
Budget Period 2

☐ Pre-Escalate Budget

Escalate Selected Categories

Replicate Selected Categories

Cancel

To replicate one budget period to others:
1. Select categories to be replicated
   - Can select all
2. Select **End Period**
   - Can replicate to the next period or all project periods
3. Click **Replicate Selected Categories**.

To **escalate** budget periods is similar:
1. Select categories to be escalated
2. Select **End Period**
3. Click **Escalate Selected Categories**.

SF424 RR
1
2
RR Performance Sites
1
RR Other Project Information
1
RR Key Persons
1
RR Budget
1
2
3
4
PHS Human Subjects and Clinic
1
PHS 398 Modular Budget
1
RR Subaward Budget Attachme
1
PHS 398 Cover Page Supplemer
1
2
PHS 398 Research Plan
1
PHS Assignment Request
1

Proposal Summary
Summary
Supporting Documents

24-0354 Electric

UEI: TX2DAGQPENZ5

Budget Type: Project

Enter name of Organizati

Period 1 Start Date: 04

A. Senior/Key Persons i

First Mid Nan
Pref. Name
Jonathan K.
Lucas
Alyssa

B. Other Personnel
* Number of
Personnel * Project
Post Doc
Graduat
Undergr
Secretar

Error (0) / Warning (0) /

Completing a Proposal *(RR Budget page 1)*

We leave Cayuse 424 for a moment.

This is an [OR Budget Template](#).

			Start Date:	10/1/2025		*NIH*	Title:	Malaria Project with UK								
			End Date:	9/30/2028			PI(s):	L.B. Jeffries								12 Months

Personnel

Enter effort either in Person Months (top section) or % Time (bottom section)

		Name/Role:	Appt. Type	Effort Type	Base Salary	Months or %:	Person Months						Period 1 10/1/25- 9/30/26
							Per 1	Per 2	Per 3	Per4	Per5	Escal	
8	1	LB Jeffries - PI (SMR)	9/12	SMR	133,620	Months	1.00	1.00	1.00			3%	14,847
9	2	Bakshi - Co-PI	11/12	CAL	122,000	Months	0.50	0.50	0.50			4%	5,545
23		**Personnel by %**					*% Time or Effort*						
24	1	LB Jeffries - PI (AY)	9/12	AY	133,620	%	20.0%	20.0%	20.0%			3%	26,724
25	2	Doyle - Postdoc	12/12	CAL	66,737	%	50.0%	50.0%	50.0%			3%	33,369
26	3	GSR - TBD	12/12	CAL	80,260	%	62.5%	62.5%	62.5%			3%	50,163
53		**Total Salaries**											130,648

Personnel Reference tab:

				FY Split:	9/3	9/3	9/3	0/0	0/0	
			UCPath CBR Group	%	%	%	%	%	Period 1
			mmer	10.5	10.8	11.1			1,526
58	2	Bakshi - Co-PI	Faculty, Acad, MSP, Safety	41.9/43.2	43.2/44.5	44.5/45.8			2,341

For all key persons, the base salary entered in 424 should be the **escalated rate** listed on the **Personnel Reference** page (bottom tab) of the OR budget templates.

Personnel (For Reference) | **Custom Esclations** *(Choose "Custom" in column O on the "Request" sheet to use these rates)* | **Base Salary with escalations** | **Person Months (For agency forms)** *APPT TYPE and BASIS (9/12,11/12,12/12) must be correctly indicated on the request sheet to ensure person month accuracy*

		Name/Role:	Personnel Type? (Choose Below)	P1	P2	P3	P4	P5	Period 1	Period 2	Period 3	Period 4	Period 5	Period 1	Period 2	Period 3	Period 4	Period 5	Type
4	1	LB Jeffries - PI (SMR)	Senior/Key	10.0%	10.0%	10.0%	10.0%	10.0%	133,620	137,629	141,757	146,010	150,390	1.00	1.00	1.00	-	-	SMR
5	2	Bakshi - Co-PI	Senior/Key	10.0%	10.0%	10.0%	10.0%	10.0%	122,000	126,880	131,955	137,233	142,723	0.50	0.50	0.50	-	-	CAL
19	1	LB Jeffries - PI (AY)	Senior/Key						133,620	137,629	141,757	146,010	150,390	1.80	1.80	1.80	-	-	AY
20	2	Doyle - Postdoc	Postdoc						66,737	68,739	70,801	72,925	75,113	6.00	6.00	6.00	-	-	CAL
21	3	GSR - TBD	GSR						80,260	82,668	85,148	87,702	90,333	7.50	7.50	7.50	-	-	CAL

141	Laboratory supplies	1,500
142	Computer for lab	3,000
143	Malaria	2,000
144	Cattle supplies	3,000

Request   F&A Details   Personnel Reference   +

Completing a Proposal *(RR Budget page 1)*

For 9/12 or 11/12 faculty, the base salary should not include the summer. The federal government does not include summer in its base salary. Workaround:
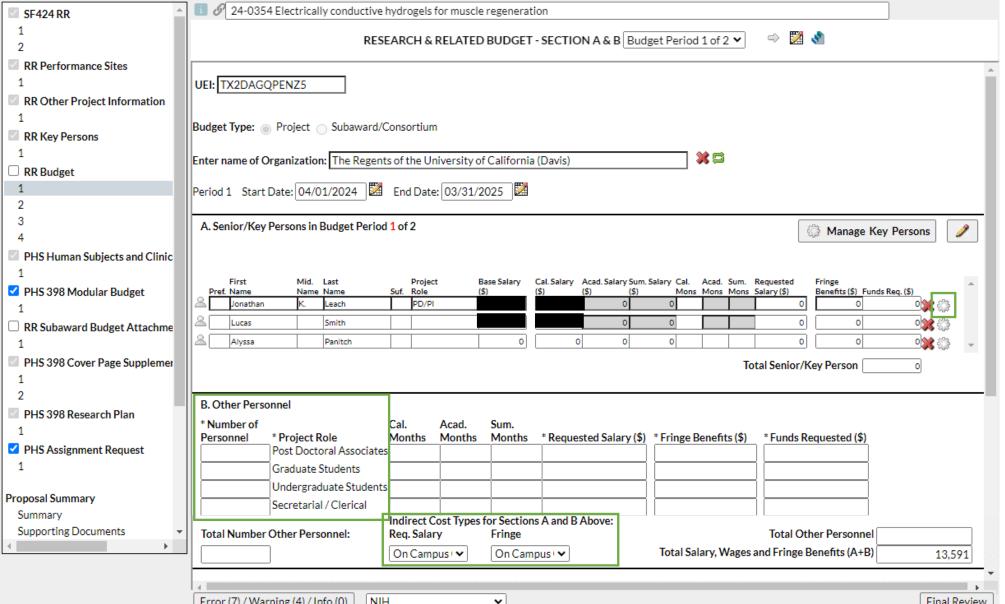
- In Cayuse 424, the base salary should be copied to either the **Acad Salary** or **Sum Salary** field to avoid warnings. Example:

Base Salary ($)	Cal. Salary ($)	Acad. Salary ($)	Sum. Salary ($)	Cal. Mons	Acad. Mons	Sum. Mons	Requested Salary ($)	Fringe Benefits ($)	Funds Req. ($)
150,000	0	150,000	0		1.800	0.900	3,900 ★	1,626	5,526

Complete the **Acad. Mons** and/or **Sum. Mons** fields with the individual's effort, then manually enter **Requested Salary** and **Fringe Benefits** to match the internal budget.

- As noted earlier, the automatic **salary** and **fringe** totals in Cayuse 424 <u>always</u> need to be overridden manually.

Note: The three fields in the green box do not go to the sponsor (they are internal fields).

Completing a Proposal *(RR Budget page 1)*
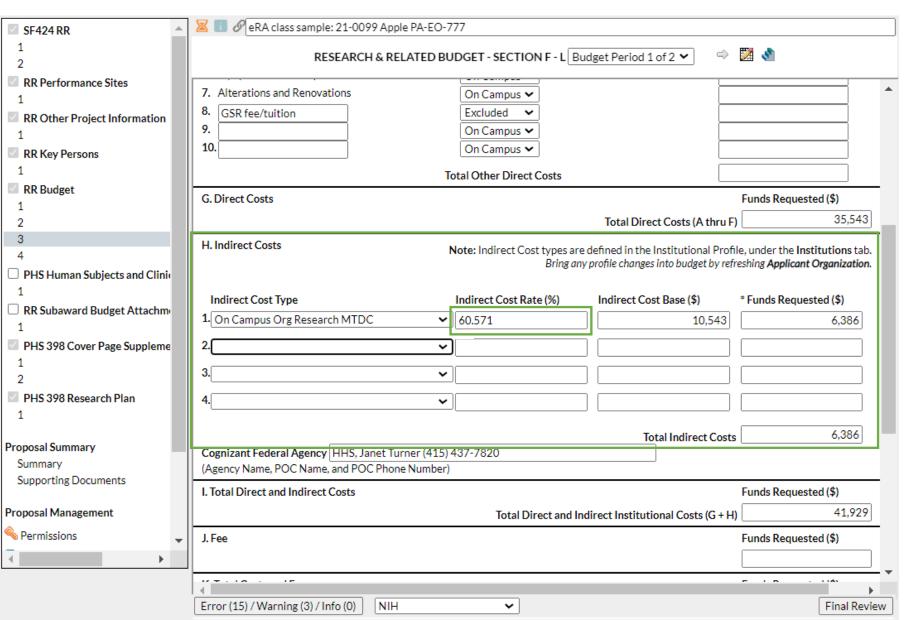
To revise an individual's effort here in the budget, click the **gear icon** ⚙ on the right.

For **Other Personnel** add a total number for each role rather than list individuals.

As you go through the budget, be sure to select the correct **Indirect Cost Type** for each section.
- Common: **On Campus Org Research MTDC**

Completing a Proposal *(RR Budget page 3)*
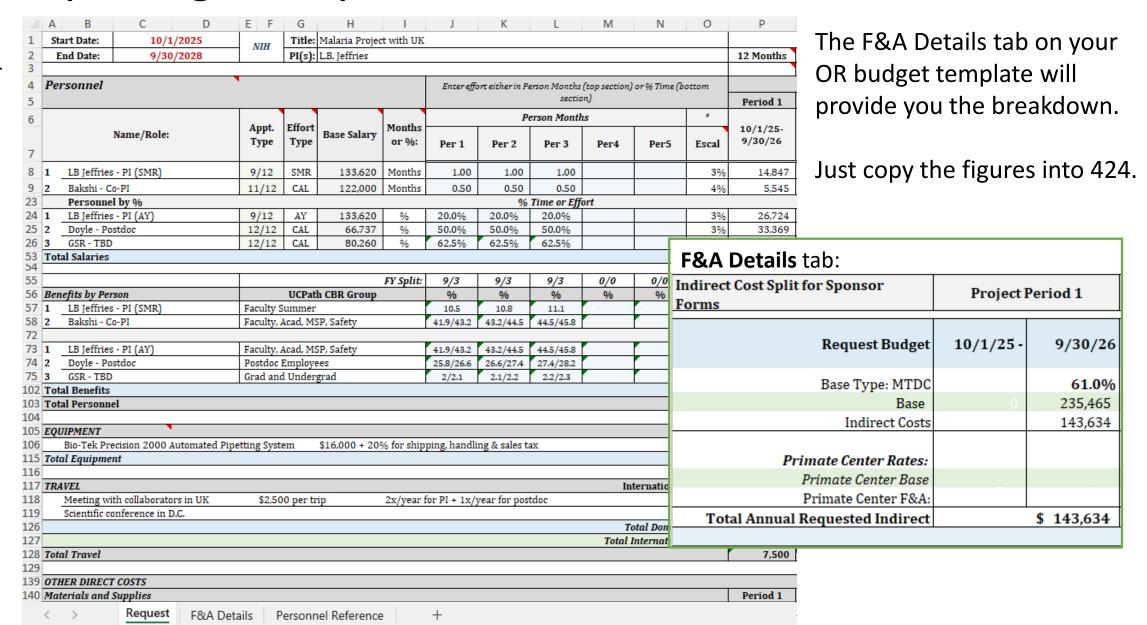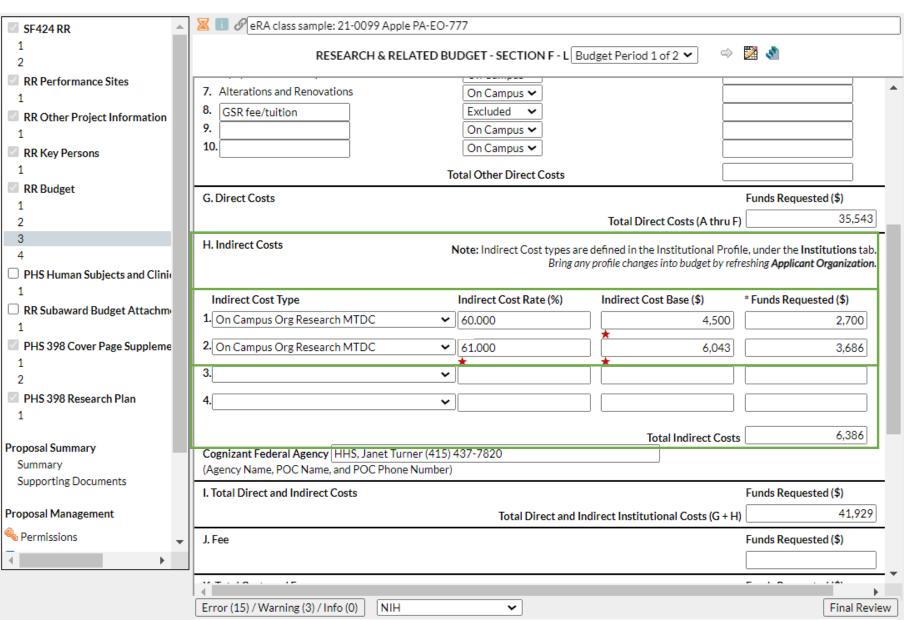
You may need to update **split rates for indirect costs**:

- Cayuse 424 automatically combines split rates into an average for the budget period.
  - In this example, 60% for the 1st part of the budget period was combined with 61% for the 2nd part for an average of 60.571%.

- Many sponsors do not allow average rates.

- Instead, you should identify the **Indirect Cost Base** for each of the two rates.

Completing a Proposal *(RR Budget page 3)*

We leave Cayuse 424 for a moment.

This is an [OR Budget Template](#).

The F&A Details tab on your OR budget template will provide you the breakdown.

Just copy the figures into 424.

|	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	Start Date:		10/1/2025			NIH	Title:	Malaria Project with UK								
2	End Date:		9/30/2028				PI(s):	L.B. Jeffries								12 Months
3																
4	**Personnel**									Enter effort either in Person Months (top section) or % Time (bottom section)						
5																Period 1
6					Appt. Type		Effort Type	Base Salary	Months or %:	*Person Months*					*	10/1/25-9/30/26
7		Name/Role:								Per 1	Per 2	Per 3	Per4	Per5	Escal	
8	1	LB Jeffries - PI (SMR)			9/12		SMR	133,620	Months	1.00	1.00	1.00			3%	14,847
9	2	Bakshi - Co-PI			11/12		CAL	122,000	Months	0.50	0.50	0.50			4%	5,545
23		**Personnel by %**								*% Time or Effort*						
24	1	LB Jeffries - PI (AY)			9/12		AY	133,620	%	20.0%	20.0%	20.0%			3%	26,724
25	2	Doyle - Postdoc			12/12		CAL	66,737	%	50.0%	50.0%	50.0%			3%	33,369
26	3	GSR - TBD			12/12		CAL	80,260	%	62.5%	62.5%	62.5%				
53	**Total Salaries**															
54																
55								FY Split:		9/3	9/3	9/3	0/0	0/0		
56	*Benefits by Person*						**UCPath CBR Group**			%	%	%	%	%		
57	1	LB Jeffries - PI (SMR)			Faculty Summer					10.5	10.8	11.1				
58	2	Bakshi - Co-PI			Faculty, Acad, MSP, Safety					41.9/43.2	43.2/44.5	44.5/45.8				
72																
73	1	LB Jeffries - PI (AY)			Faculty, Acad, MSP, Safety					41.9/43.2	43.2/44.5	44.5/45.8				
74	2	Doyle - Postdoc			Postdoc Employees					25.8/26.6	26.6/27.4	27.4/28.2				
75	3	GSR - TBD			Grad and Undergrad					2/2.1	2.1/2.2	2.2/2.3				
102	**Total Benefits**															
103	**Total Personnel**															
104																
105	*EQUIPMENT*															
106		Bio-Tek Precision 2000 Automated Pipetting System				$16,000 + 20% for shipping, handling & sales tax										
115	*Total Equipment*															
116																
117	*TRAVEL*													Internatio		
118		Meeting with collaborators in UK			$2,500 per trip			2x/year for PI + 1x/year for postdoc								
119		Scientific conference in D.C.														
126													Total Don			
127													Total Internat			
128	*Total Travel*															7,500
129																
139	*OTHER DIRECT COSTS*															
140	*Materials and Supplies*															Period 1

F&A Details tab:

Indirect Cost Split for Sponsor Forms		**Project Period 1**
Request Budget	**10/1/25 -**	**9/30/26**
Base Type: MTDC		**61.0%**
Base	0	235,465
Indirect Costs		143,634
Primate Center Rates:		
Primate Center Base	-	-
Primate Center F&A:		
Total Annual Requested Indirect		**$ 143,634**

⟨ ⟩   **Request**   F&A Details   Personnel Reference   +

Completing a Proposal *(RR Budget page 3)*

When working with split rates:

Populate the first line with the **1st indirect cost rate and base**, then create a second line with the **2nd rate and base**.

Be sure the **Total Indirect Costs** matches the internal budget.

Activity 1 continued: RR Budget & Other Forms

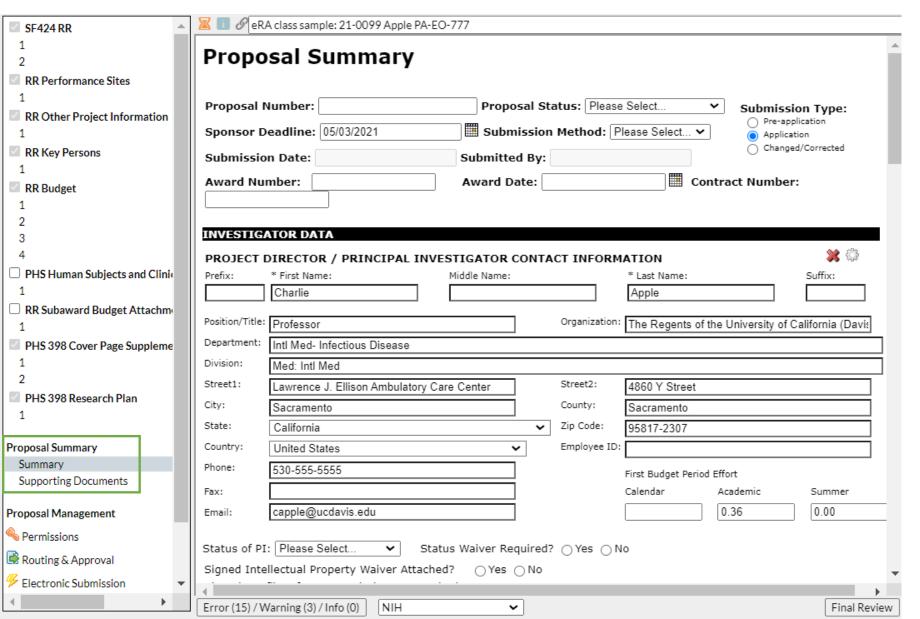Use the budget table at right to complete the **RR Budget** form.

Then use the information below to help you complete the four remaining forms:

- **Project Title:** Socio-ecological factors in Malaria transmission
- **IRB Application #:** 00004557, approved 2/10/25
- **IACUC Protocol:** A3433-01, approved 2/1/25 (bovine)
- **Cover Page Supplement** questions: *Assume you need to check with the PI*

When complete, type **done** in chat so we know we can proceed.

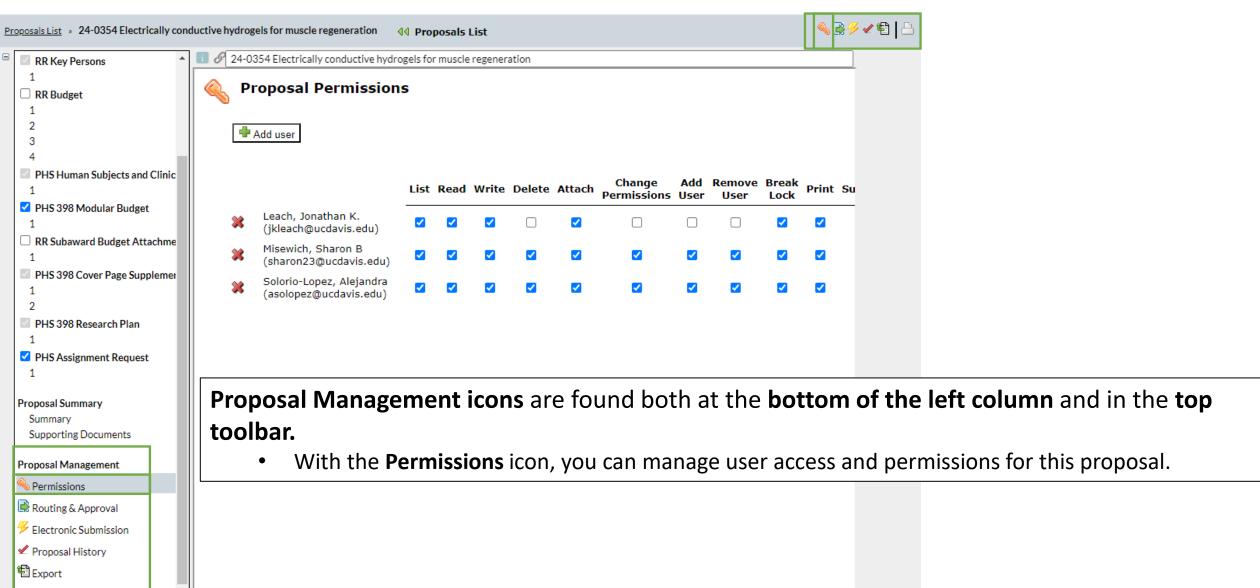We then will demonstrate how the proposal could have been completed.

Line Item	Year 1	Year 2 (+3%)	Total Project
Salary for Charlie Apple, PI – 3% Effort, 0.36 Person-Months ($150,000 Calendar salary)	$ 4,500	$ 4,635	$ 9,135
Salary for Gary Imaginary, Co-PI – 3% Effort, 0.27 Person-Months ($130,000 AY salary)	$ 3,900	$ 4,017	$ 7,917
Salary Total	**$ 8,400**	**$ 8,652**	**$ 17,052**
Charlie Apple, PI Fringe Benefits	$ 1,241	$ 1,315	$ 2,556
Gary Imaginary, Co-PI Fringe Benefits	$ 1,626	$ 1,727	$ 3,353
Benefits Total	**$ 2,867**	**$ 3,042**	**$ 5,909**
PERSONNEL TOTAL	**$11,267**	**$11,694**	**$22,961**
MRI	$25,000	$ 0	$25,000
EQUIPMENT TOTAL	**$25,000**	**$ 0**	**$25,000**
TOTAL DIRECT COSTS	**$36,267**	**$11,694**	**$47,961**
Indirect Cost Base	$11,267	$11,694	$22,961
Indirect Costs (MTDC 61%)	$ 6,873	$ 7,133	$14,006
TOTAL PROJECT COSTS	**$43,140**	**$18,827**	**$61,967**

Completing a Proposal
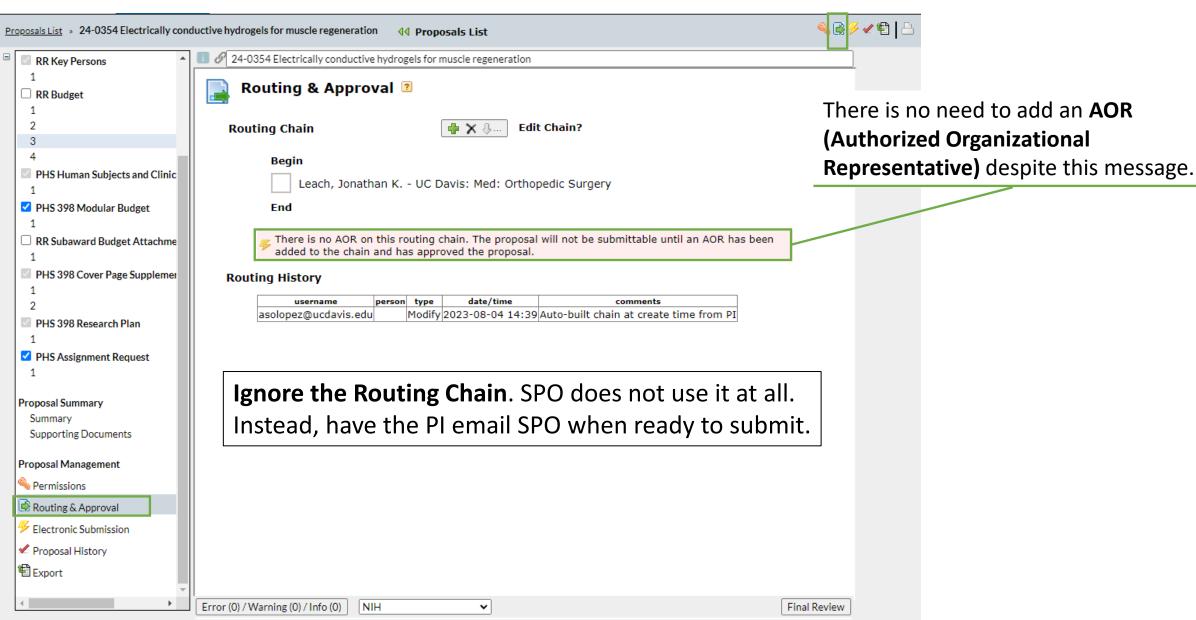
Ignore the **Proposal Summary.**

It is not needed and can cause unnecessary confusion.

Completing a Proposal

Proposal Management icons are found both at the **bottom of the left column** and in the **top toolbar.**

- With the **Permissions** icon, you can manage user access and permissions for this proposal.

Completing a Proposal

There is no need to add an **AOR (Authorized Organizational Representative)** despite this message.

Ignore the Routing Chain. SPO does not use it at all. Instead, have the PI email SPO when ready to submit.

Completing a Proposal

With the **Electronic Submission** icon, you can validate this proposal or retrieve submission information.

- Though you should have corrected all the errors and warnings before getting to this stage, it's highly recommended to click **Validate Proposal** and address any additional issues that are identified.
  - Let your assigned SPO analyst know that you have completed this process.
  - As noted earlier, SPO will usually submit the proposal on behalf of the university.
- The **Proposal History** icon simply lists all actions done to the proposal.
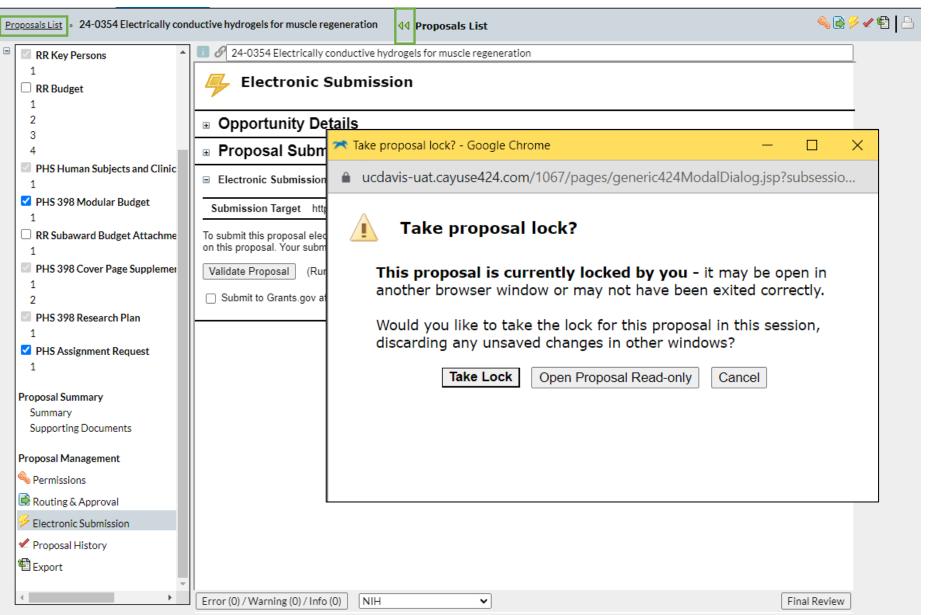- We'll cover the **Export** icon in the following subawards section.

Completing a Proposal

The **Chain Icon** provides a quick link you can send another user to more quickly access the 424 proposal.
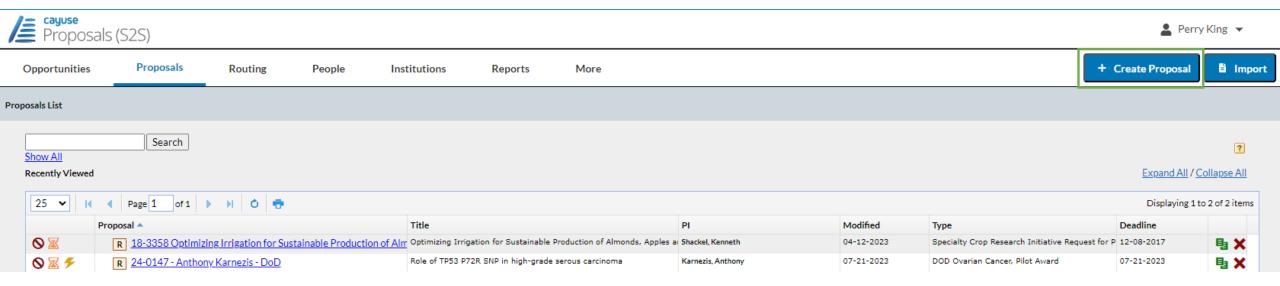
Exiting a Proposal

Always use the **green arrows** or the **Proposal List** link to exit an application to avoid locking it.

If locked, you will be asked **Take proposal lock?**

Do this only if you know someone is not possibly in the document and editing it at this time.

Preparing a Subaward Proposal
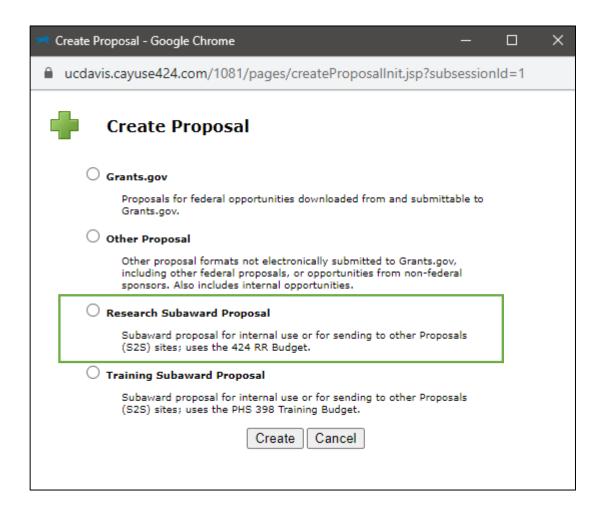
As described earlier, when UC Davis is a subrecipient on another institution's proposal, start the subaward proposal by clicking **+ Create Proposal.**

- The reason for this is that the prospective subaward will not be found under **Opportunities.**
  - **Opportunities** lists Federal public funding announcements.

Preparing a Subaward Proposal

When you click **+ Create Proposal**, this pop-up will appear.
- Select either **Research Subaward Proposal** or **Training Subaward Proposal**, then click **Create.**
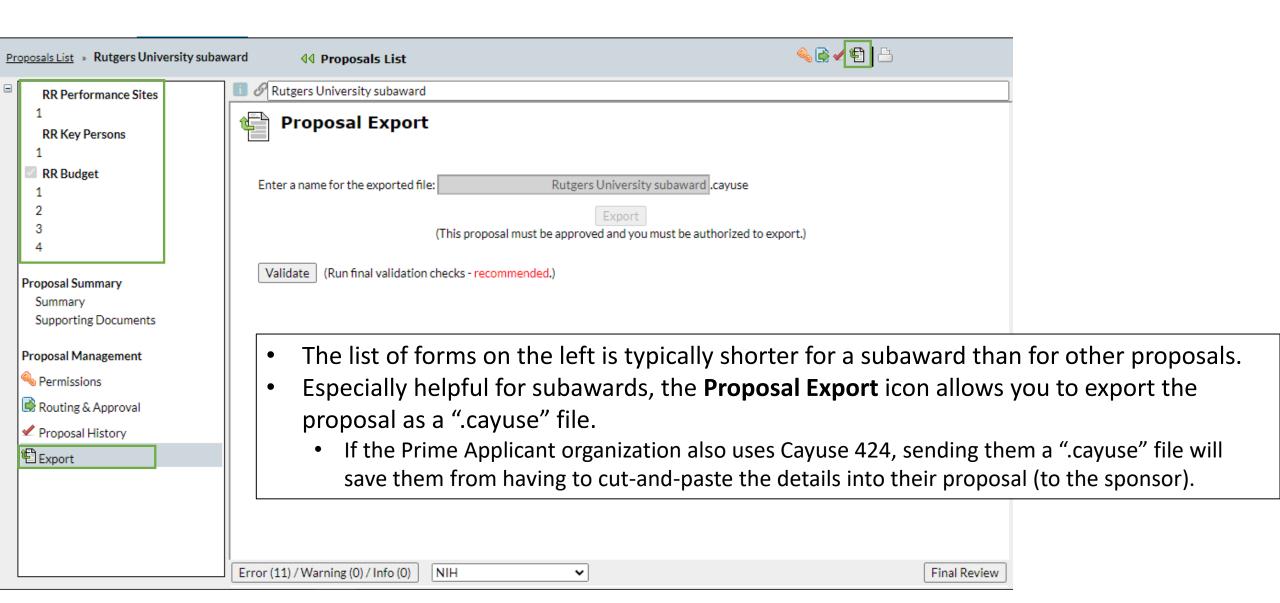
Preparing a Subaward Proposal
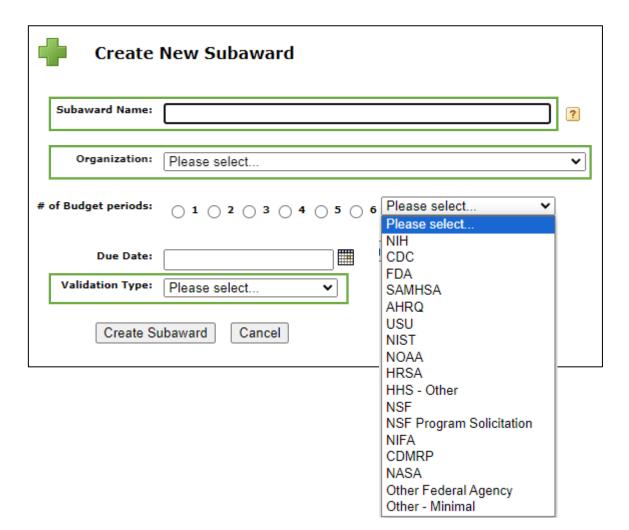
The next pop-up to appear is similar to the one you see when you start a proposal from the **Opportunities** list.

- **Subaward Name:** In addition to items already suggested for **Proposal Name**, add the **prime sponsor.**
  - Example: 24-5555 Apple UCLA NIH
- **Organization:** Select the organization from a list.
  - If your organization is not yet listed, leave it blank and email ORCayuseHelp@ucdavis.edu to ask it be added.
    - In your email, include all the info you have about the subawarding organization.
- **Validation Type:** This can auto-populate based on the organization.
  - If not, select the most appropriate entry.
- Click **Create Subaward**.

Preparing a Subaward Proposal

- The list of forms on the left is typically shorter for a subaward than for other proposals.
- Especially helpful for subawards, the **Proposal Export** icon allows you to export the proposal as a ".cayuse" file.
  - If the Prime Applicant organization also uses Cayuse 424, sending them a ".cayuse" file will save them from having to cut-and-paste the details into their proposal (to the sponsor).

CAYUSE PROFESSIONAL PROFILES

Professional Profiles Overview

All Cayuse users need a Professional Profile:
- PIs, Co-PIs and senior personnel
- Anyone who prepares/assists with preparing proposals
- Anyone who approves IPFs:
  - Unit heads (Role: IPF Approver), Pre-Award Spending Approvers
- Anyone who needs access to proposals, awards and subawards in Cayuse SP

Professional Profiles include details that **import into Cayuse SP IPFs and Cayuse 424 proposals:**
- **Appointment Information**
  - Default home unit, appointment type and contact information
- **Budget Information**
  - Salary and benefits codes
- **Cayuse Role**
  - **PI** – anyone who may be added to a proposal as an investigator
  - **Assistant** - anyone who may help prepare a proposal

Professional Profiles Overview

All users should verify the accuracy of their Professional Profiles.

- A wrong unit affiliation can hold up the routing of an IPF for approvals.
  - You <u>can</u> change the unit and other information on a proposal-by-proposal basis in both Cayuse SP and 424.
- Improve the accuracy of budget calculations by keeping salary and appointment information current.

To prevent duplications, **do not create a Professional Profile for someone else** (unless for someone not at UCD whom you have searched for with spelling confirmed).

How to Check a Professional Profile

Cayuse Research Suite
3.9.2

Research Administration Modules

- Cayuse SP (Sponsored Projects)
- Cayuse 424
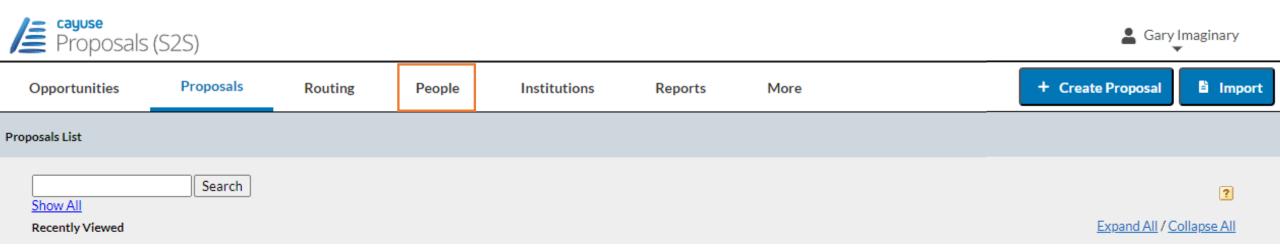
System Administration Applications

- Backbone
- Research Contacts
- Events
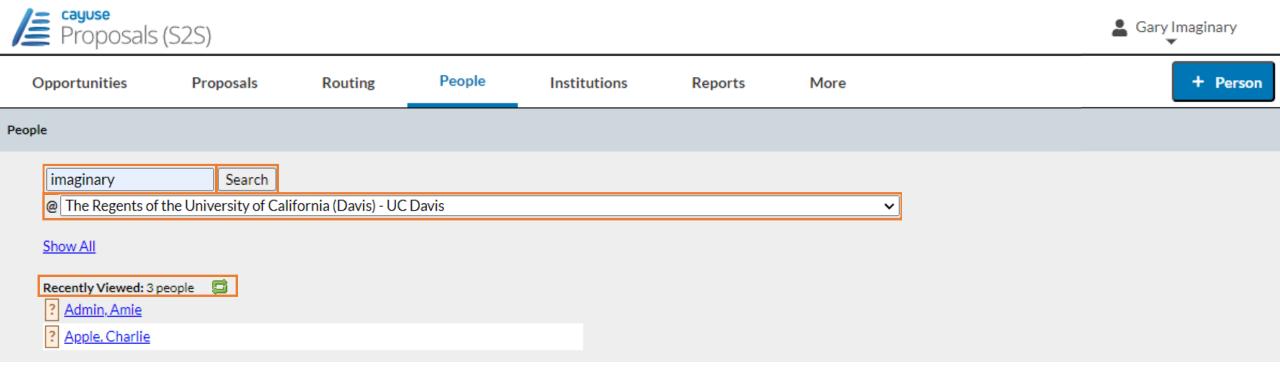
Application Help

- Research Suite Support Center

Select **Cayuse 424** on the Cayuse front page (https://ucdavis.cayuse424.com/)

How to Check a Professional Profile
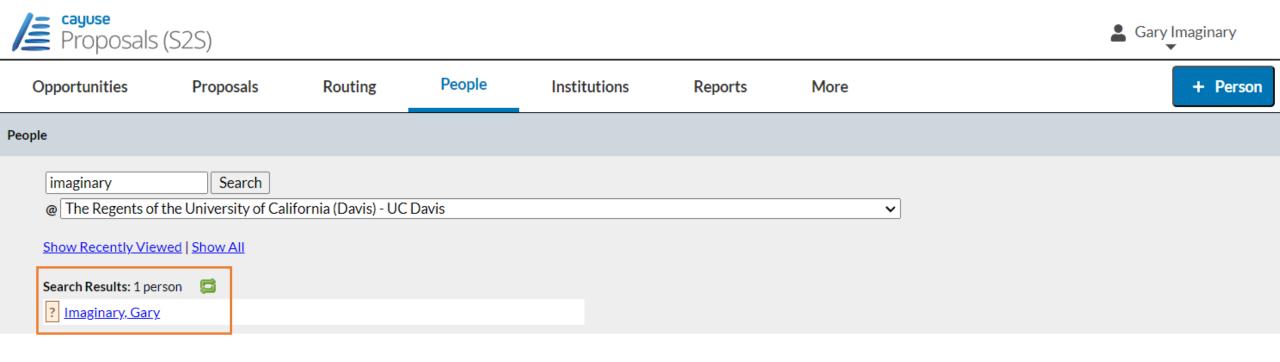
On the Cayuse 424 top toolbar, select **People**.

How to Check a Professional Profile
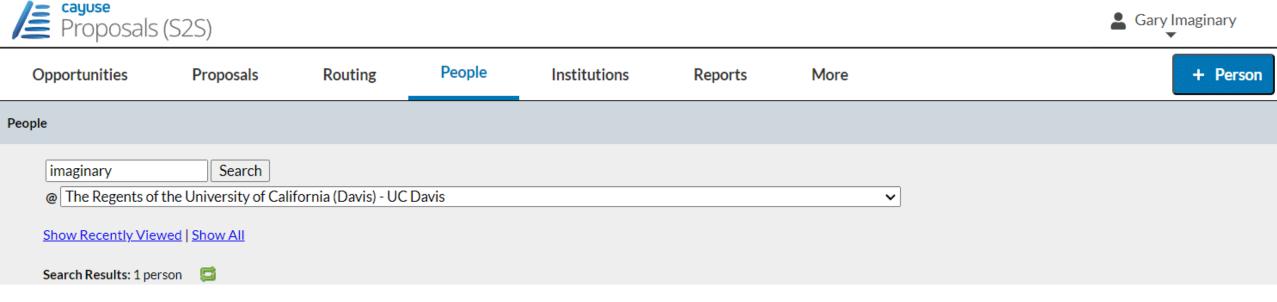
The first step is always to confirm whether a Professional Profile already exists.

1. Look under **Recently Viewed.** If there, just click on name to open the profile.
2. If name not there, **enter last name in search field**
3. To speed the search, click on **All Institutions** and select **The Regents of the University of California (Davis)**
4. Then click **Search.**

How to Check a Professional Profile

If the Professional Profile already exists, it will appear in the **Search Results**, and you can simply click on the name.

- If no name, search again by a different spelling or by all institutions.

How to Check a Professional Profile

If the name still doesn't appear, a Professional Profile will need to be created.
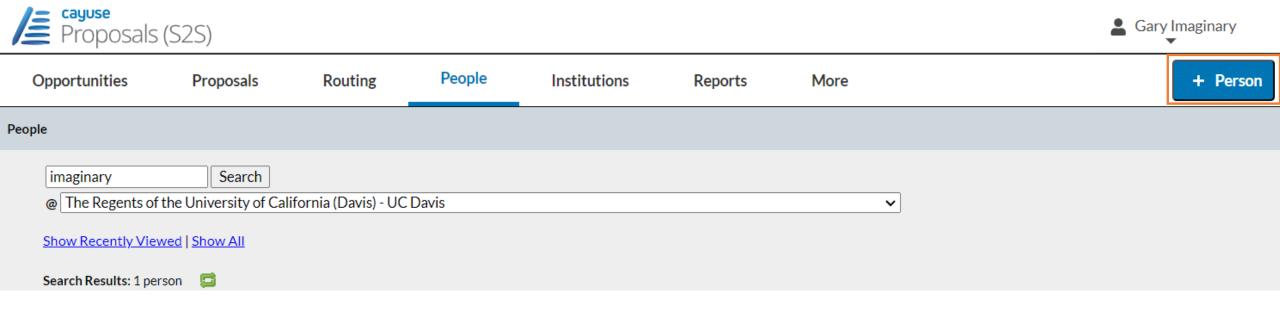
- **Never create a profile for someone at UC Davis.**

To add UC Davis personnel, **email request to orcayusehelp@ucdavis.edu**. Include this information:

- **First and last name**
- **Kerberos username** *(if known; can differ from email address)*
- **UCD email address**

- **Department**
- **PI status**: will they be submitting as PI at some point, Yes or No?

Note: Added personnel will not have access to **Cayuse SP** until an overnight update takes place.

How to Check a Professional Profile

To add someone into Cayuse **who isn't at UC Davis**, such as a PI at a subrecipient institution, click **+ Person** and follow the prompts.
- When assigned role of **PI**, this individual will immediately be able to be selected and added to a Cayuse 424 proposal.
  - This individual will not, however, have appropriate permissions to access the UC Davis Cayuse Research Suite.

Activity 2: Your Professional Profile

Login to Cayuse as yourself (Actual Cayuse, not UAT): **https://ucdavis.cayuse424.com**

(copy from Zoom chat)

- Use your Kerberos login & passphrase
- Select **Cayuse 424**
- Select **People** tab in top toolbar

Find Your Professional Profile in the **People** tab:

1. Enter your **last name** in the search field.
2. Change the Institution to **The Regents of the University of California (Davis) – UC Davis**.
3. Select **Search**.
4. **Select your name** if it is on the list and make any needed updates.

Activity 2: Your Professional Profile

If you do not have a **Professional Profile** you will be unable to log into Cayuse.

In this case, email **ORCayuseHelp@ucdavis.edu** to request a Profile and provide the following information:

- First Name:
- Last Name:
- Kerberos username (if known):
- UC Davis Email address:
- Dept:
- PI status (Will you be submitting as PI at some point (Yes/No)):

If you need this info, **please screenshot this page** and paste it somewhere handy so we proceed to the next slides.

Permissions

🔑 **Permissions**
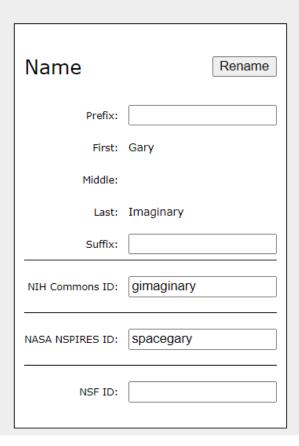
Professional Profile: Imaginary, Gary 🗙

General Personal Information

Name ▶
Degrees
Demographics
Biosketches

1 Institutional Association ➕

🗙 **UC Davis (Cinema & Digital Media)**

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

⚙ Routing Profile

Name [Rename]

Prefix: [   ]

First: Gary

Middle:

Last: Imaginary

Suffix: [   ]

NIH Commons ID: [gimaginary   ]

NASA NSPIRES ID: [spacegary   ]

NSF ID: [   ]
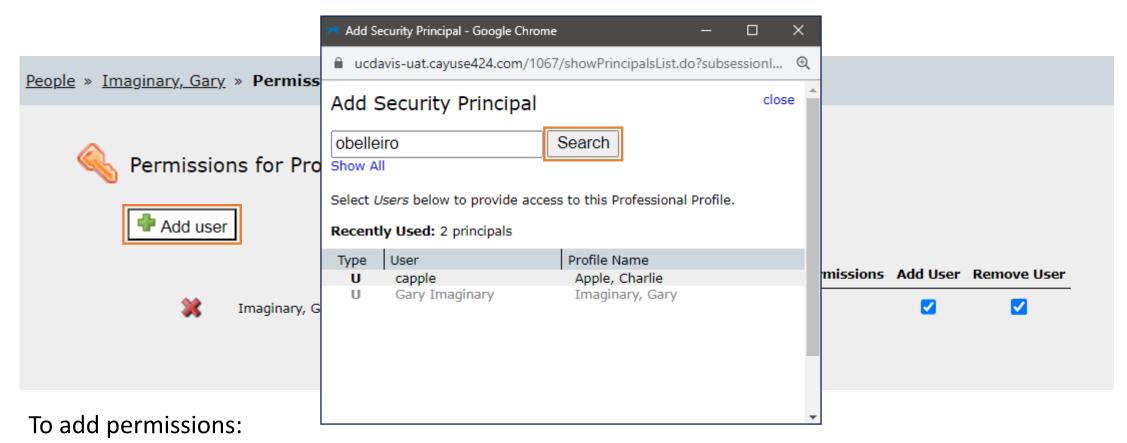
Let's start with **Permissions** in the top right.

Use **Permissions** to assign another person access to your own Professional Profile.
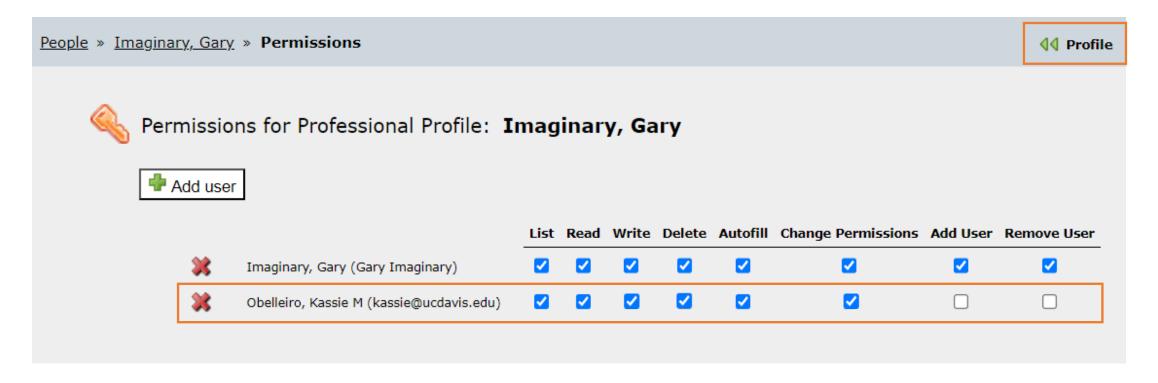
- You cannot update **Permissions** when viewing someone else's profile.

Permissions

To add permissions:
- Click **Add user**
- In pop-up, type **last name** of individual to receive permissions
- Click **Search.** Then click on name in **search results.**

Permissions
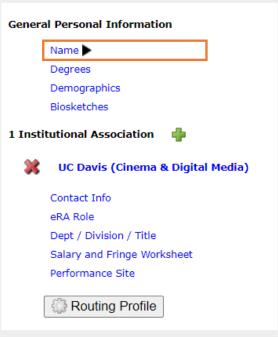
- Click checkboxes to **add/remove permissions**
- Or click **red X** to **remove an individual**
- When ready to return to profile, click **Profile** in the top right

Name Field

Professional Profile: **Imaginary, Gary** ❌

General Personal Information

Name ▶

Degrees

Demographics

Biosketches

1 Institutional Association ➕

❌ **UC Davis (Cinema & Digital Media)**

Contact Info

eRA Role

Dept / Division / Title

Salary and Fringe Worksheet

Performance Site

⚙ Routing Profile

Name   [Rename]

Prefix: [   ]

First: Gary

Middle:

Last: Imaginary

Suffix: [   ]

NIH Commons ID: [gimaginary   ]

NASA NSPIRES ID: [   ]

NSF ID: [   ]

Select **Rename** to edit name.

If you add the NIH Commons ID here, it will auto-populate into Cayuse 424 proposals.
- Ignore the NASA and NSF entries.
  - NASA proposals must use NSPIRES, not Cayuse 424.
  - NSF proposals use Research.gov, not Cayuse 424.
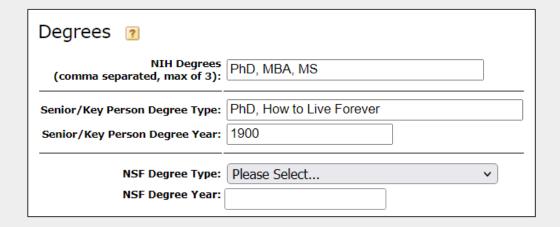
Important: Whenever you edit any Professional Profile page, click the save icon 🖫 in the top right to save it.

Degrees Field

Enter degree information here to auto-populate into NIH or other Cayuse 424 proposals.

- Ignore the NSF fields since NSF uses Research.gov, not Cayuse 424.

Demographics Field

Professional Profile: **Imaginary, Gary** 📝

General Personal Information

Name

Degrees

Demographics ▶

Biosketches

1 Institutional Association ✚

❌ **UC Davis (Cinema & Digital Media)**

Contact Info

eRA Role

Dept / Division / Title

Salary and Fringe Worksheet

Performance Site

⚙ Routing Profile

Demographics

Gender: [Please Select... ⌄]

Race (Check all that apply):
☐ American Indian or Alaska Native
☐ Asian
☐ Black or African American
☐ Native Hawaiian or Other Pacific Islander
☐ White
☐ Do Not Wish to Provide

Ethnicity: [Please Select... ⌄]

Citizenship: [Please Select... ⌄]

Disability Status (Check all that apply):
☐ Hearing
☐ Visual
☐ Mobility/Orthopedic Impairment
☐ Other
☐ None
☐ Do Not Wish to Provide

Ignore this tab.

UC Davis does not collect nor distribute demographics information.

Biosketches & Institutional Association

Permissions

Professional Profile: **Imaginary, Gary**

General Personal Information

Name
Degrees
Demographics
Biosketches ▶

1 Institutional Association ➕

❌ **UC Davis (Cinema & Digital Media)**

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

⚙ Routing Profile

Biosketches

Add Biosketch

Currently no Biosketches are filed in Proposals (S2S) for "Imaginary, Gary."

SPO recommends you ignore this tab.

- Biosketches should be updated for each proposal application.
- Biosketches added here may become out of date.

Institutional Association:

- If the wrong department is listed, **do not click the red X.**
  - Clicking the red X will remove the individual's association with UC Davis.
    - Instead, change the department in the **Dept / Division / Title** tab *(to be seen soon)*

Contact Info

Professional Profile: **Imaginary, Gary** 🗙

General Personal Information

    Name
    Degrees
    Demographics
    Biosketches

1 Institutional Association ➕

  🗙 **UC Davis (Cinema & Digital Media)**

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

    ⚙ Routing Profile

UC Davis (Cinema & Digital Media)
Contact Info

Field	Value
Street 1:	One Shields Avenue
Street 2:	
City:	Davis
State/Province:	California
Zip/Postal Code:	95616
County:	Yolo
Country:	United States
Phone:	
Fax:	
Email:	gimaginary@ucdavis.edu

Enter the individual's **workplace contact info,** not where the project work is to be performed.
- That goes under **Performance Site** below.

eRA Role

Professional Profile: **Imaginary, Gary** 🗑

General Personal Information

Name
Degrees
Demographics
Biosketches

1 Institutional Association ➕

❌ **UC Davis (Cinema & Digital Media)**

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

⚙ Routing Profile

UC Davis (Cinema & Digital Media)
eRA Role

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

This section is important.

Select **Principal Investigator** if the individual is to be added to a Cayuse 424 proposal.

- If **Principal Investigator** is not selected, their name will not appear when searched for in Cayuse 424.

All others should select **Assistant**.

- The other roles are greyed out and are for Sponsored Programs Office staff.

Dept / Division / Title
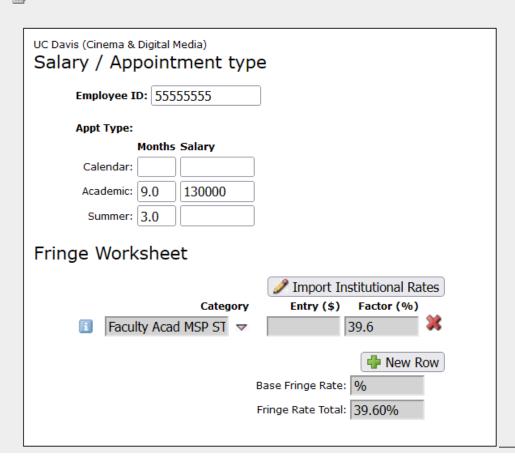
- If needed, search for and select an updated **Division and Department**
- You can also add the individual's **Position/title**
- Ignore the NASA section

Salary and Fringe Worksheet

Permissions

Professional Profile: **Imaginary, Gary**

General Personal Information

Name
Degrees
Demographics
Biosketches

1 Institutional Association

UC Davis (Cinema & Digital Media)

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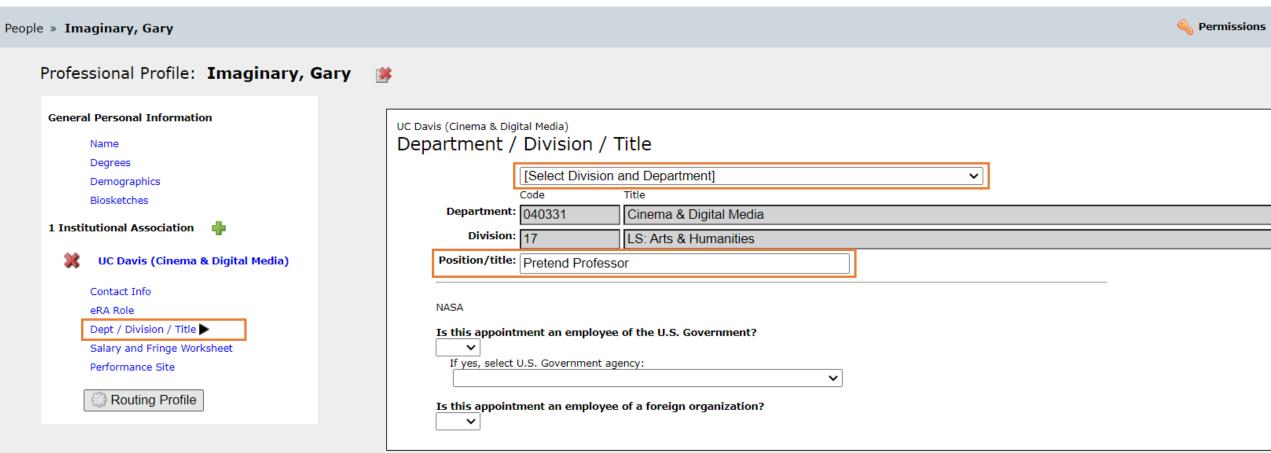Performance Site

Routing Profile

UC Davis (Cinema & Digital Media)
Salary / Appointment type

Employee ID: 55555555

Appt Type:

	Months	Salary
Calendar:		
Academic:	9.0	130000
Summer:	3.0	

Fringe Worksheet

Import Institutional Rates

	Category	Entry ($)	Factor (%)	
ℹ	Faculty Acad MSP ST ▽		39.6	✖

New Row
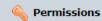
Base Fringe Rate: %

Fringe Rate Total: 39.60%

Manually enter details here to auto-populate into Cayuse 424 proposals.

- Of course, entries can grow out-of-date, so always double-check auto-populated info.
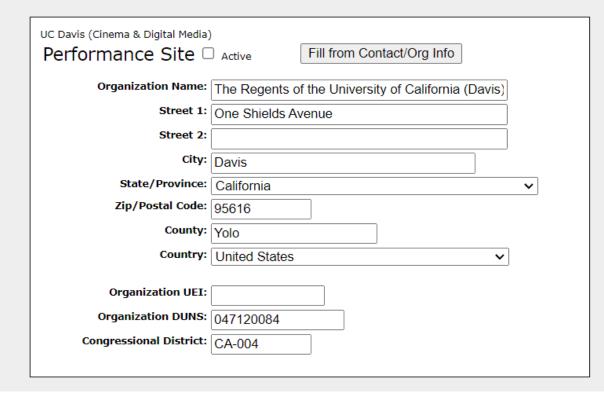
Performance Site

Professional Profile: **Imaginary, Gary** 🗑

General Personal Information

Name
Degrees
Demographics
Biosketches

1 Institutional Association ➕

❌ **UC Davis (Cinema & Digital Media)**

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

⚙ Routing Profile

UC Davis (Cinema & Digital Media)
Performance Site ☐ Active   [Fill from Contact/Org Info]

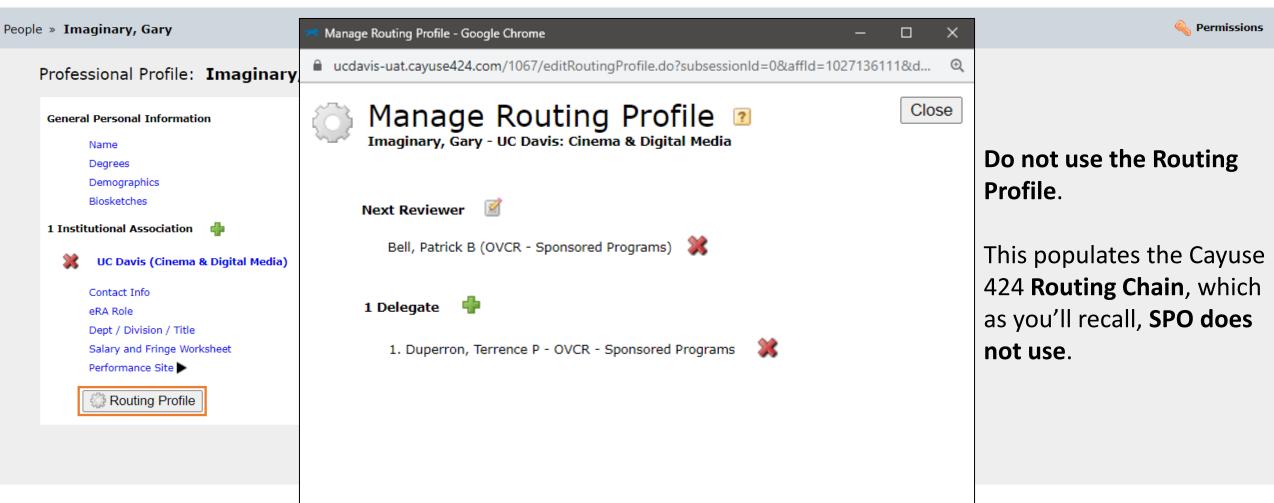|	
Organization Name:	The Regents of the University of California (Davis)
Street 1:	One Shields Avenue
Street 2:	
City:	Davis
State/Province:	California ▼
Zip/Postal Code:	95616
County:	Yolo
Country:	United States ▼
Organization UEI:	
Organization DUNS:	047120084
Congressional District:	CA-004

Enter the primary location where project work will be performed.

- If same as **Contact Info**, select **Fill from Contact/Org Info**.

Click **Active**

Institutional Information

Routing Profile

Professional Profile: **Imaginary**

General Personal Information

Name
Degrees
Demographics
Biosketches

1 Institutional Association ✚

✖ **UC Davis (Cinema & Digital Media)**

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

⚙ Routing Profile

Permissions

Manage Routing Profile - Google Chrome

🔒 ucdavis-uat.cayuse424.com/1067/editRoutingProfile.do?subsessionId=0&affId=1027136111&d...

⚙ Manage Routing Profile ❓

Imaginary, Gary - UC Davis: Cinema & Digital Media

Close

Next Reviewer ✎

Bell, Patrick B (OVCR - Sponsored Programs) ✖

1 Delegate ✚

1. Duperron, Terrence P - OVCR - Sponsored Programs ✖

Do not use the Routing Profile.

This populates the Cayuse 424 **Routing Chain**, which as you'll recall, **SPO does not use**.

Learning Objectives Recap

Hopefully, you now...

Know the general proposal submission process
- For some, this will be a refresher

Know how to prepare and submit a proposal in Cayuse 424

Know how to create and update a Professional Profile
(in Cayuse 424)

Any last questions?

Contact Us

Let us know how we did:

https://ucdavis.co1.qualtrics.com/jfe/form/SV_0N7ipLAZI1yT8TI

Jeff Grandy
Proposals Team Analyst
Tel: 530 754 0861
Email: jmgrandy@ucdavis.edu
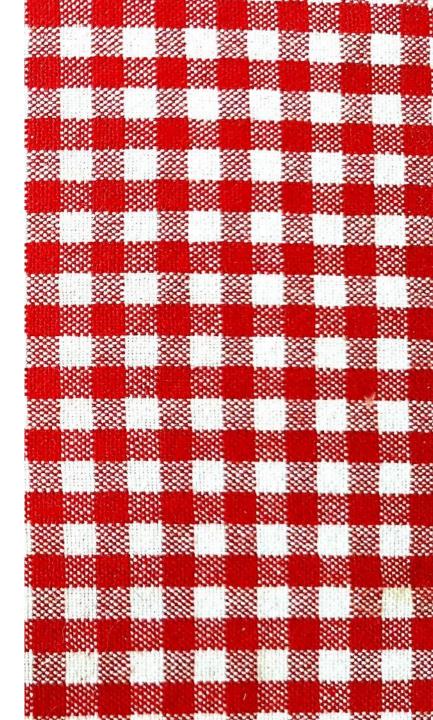
Perry King
Training Officer
Tel: 530 304 8137
Email: pking@ucdavis.edu

RESOURCES

Resources

- Learn: Cayuse 424 page

  - Written materials:
    - Cayuse 424 Tips – 1-page list of Cayuse 424 reminders & tips for department administrators
    - Setting up Your Cayuse Professional Profile – 12-page document with screenshots on setting up your professional profile in Cayuse 424
    - Cayuse 424 User Guide – Comprehensive (but outdated) 136-page document on all aspects of Cayuse 424 usage.
      - Cayuse will not be publishing an updated user guide. They are instead using the Cayuse Help Center (free account required).

  - YouTube videos:
    - *Note: if a video doesn't start on the first try, refresh the video and it should then work.*
    - How to Prepare a Cayuse 424 Proposal – YouTube video short (12:33)
    - Managing Professional Profiles – YouTube video short (10:26)

Common Acronyms

- **AMRC**: Anatomic Materials Review Committee
- **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, aka indirect cost rates
- **FOA**: Funding Opportunity Announcement
- **IACUC**: Institutional Animal Care and Use Committee
- **ICR:** Indirect Cost Rate
- **IDC:** Indirect Costs
- **IPF**: Internal Processing Form (Cayuse SP "proposal")

- **IP**: Intellectual Property
- **IRB**: Institutional Review Board (Human Subjects)
- **PHS**: Public Health Service
- **PI**: Principal Investigator
- **RCR**: Responsible Conduct of Research
- **RECO**: Research Ethics and Compliance Office
- **RFA**: Request for Applications
- **RFP**: Request for Proposals
- **RPPR**: Research Performance Progress Reports
- **SBIR**: Small Business Innovation Research
- **SPO**: Sponsored Programs Office
- **STTR**: Small Business Technology Transfer

Sponsored Programs Contacts & Links

- 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

- Negotiations: OR-SPO-Negotiation-Team@ad3.ucdavis.edu

- SPO Contact Us webpage

- Sponsored Programs Office (SPO)

- SPO Proposal and Award Learning Resources

UC Learning Center Classes

SPO offers classes individually or as a series:

- Individual classes (under "Grants and Sponsored Programs")
- Research Administration Certificate Series (RACS)
- eRA Train the Trainer certificate series

SPO Office Hours & Research Admin Workshops

SPO Office Hours

Bring your questions and join our knowledgeable staff for guidance and training on preparing and submitting proposals for extramural funding.

Drop in **via Zoom** the **1st Thursday** of each month between **10 and 11am**

https://ucdavis.zoom.us/j/96045587567?pwd=MnVMTXN5SDRuM0RITzlKUjNmdjl5Zz09

(Meeting ID: 960 4558 7567 Passcode: 862138)

All SPO training opportunities at

https://research.ucdavis.edu/research-support/proposals/spo-proposal/spo-training/training-opps/

Research Administration Forum

Join via Zoom
4th Wednesday of each month (Jan – Oct)
8:30 am

Forum for department research administrators to

Hear updates   **Ask questions**   **Provide feedback**

Sponsored Programs Office (SPO)
Contracts and Grants Accounting (CGA)
Research Ethics and Compliance Office (RECO)
IRB Administration
IACUC
Technology Transfer

Access videos of previous forums and related materials on the Forum webpage

Office of Research Listservs

- **Contracts & Grants (OVCR-cg) listserv**
  - The primary mechanism for informing the campus community of the latest research administration news.
  - Click this link to subscribe (UC Davis emails)

- **SPO Cayuse info listserv**
  - Cayuse SP and 424 info and announcements.
  - Click this link to subscribe (UC Davis emails)
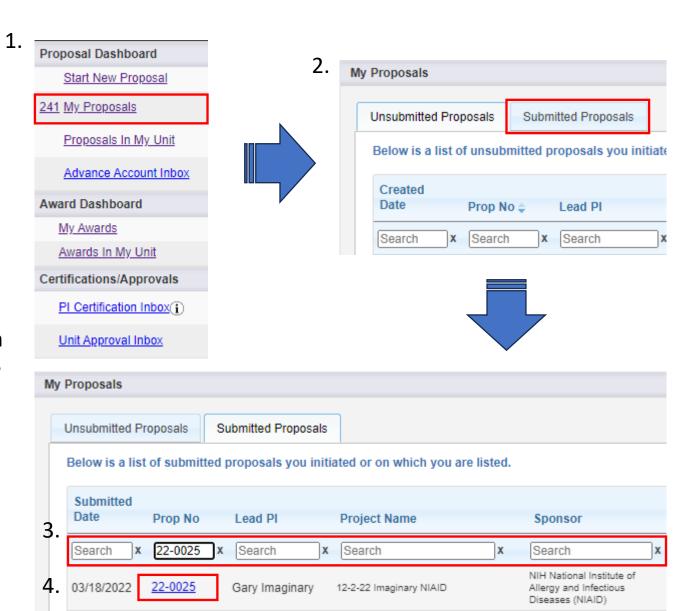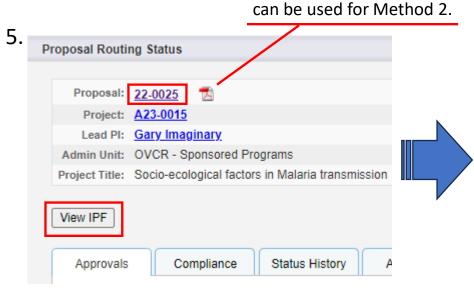
- Other Office of Research Listservs

Thank you

UC DAVIS
OFFICE of RESEARCH

Follow SPO on
X and YouTube!

Addendum

How to Pull Content from Cayuse SP to Paste into 424

Most folks already have their proposal content in place, but we include this process in case it's helpful.

Method 1 (of 2):

- **Use two browser screens**, one open to **Cayuse SP** and the other to **Cayuse 424**. Cut-and-paste from SP into 424.
  - **Upside**: You can easily copy written text
  - **Downside**: You have to navigate through all the tabs in the left column to find the content you're looking for.
- To access your proposal in Cayuse SP:
  1. From **Proposal Dashboard**, select **My Proposals**
  2. Select **Submitted Proposals**
  3. **Search** for your Proposal
  4. Click on **Prop No**

1.

Proposal Dashboard
- Start New Proposal
- 241 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

2.

My Proposals

| Unsubmitted Proposals | Submitted Proposals |

Below is a list of unsubmitted proposals you initiate

Created Date	Prop No ⬍	Lead PI
Search x	Search x	Search x

3.

My Proposals

| Unsubmitted Proposals | Submitted Proposals |

Below is a list of submitted proposals you initiated or on which you are listed.

Submitted Date	Prop No	Lead PI	Project Name	Sponsor
Search x	22-0025 x	Search x	Search x	Search x
4. 03/18/2022	22-0025	Gary Imaginary	12-2-22 Imaginary NIAID	NIH National Institute of Allergy and Infectious Diseases (NIAID)

How to Pull Content from Cayuse SP to Paste into 424

5. Then, either click on **View IPF** or on the **Proposal number** up top.

5.

Note the PDF icon. This can be used for Method 2.

Proposal Routing Status

Proposal: 22-0025
Project: A23-0015
Lead PI: Gary Imaginary
Admin Unit: OVCR - Sponsored Programs
Project Title: Socio-ecological factors in Malaria transmission

View IPF

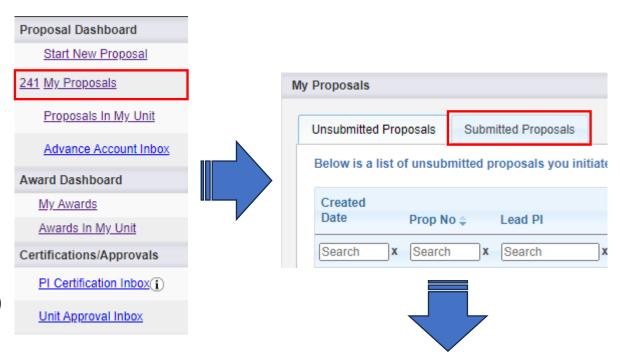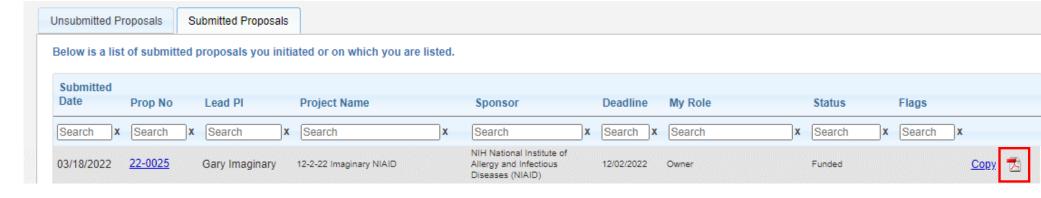| Approvals | Compliance | Status History | A |

Item List   22-0025

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

View Routing Status

How to Pull Content from Cayuse SP to Paste into 424

Method 2:

Print the entire Cayuse SP proposal as a PDF to reference while populating Cayuse 424.

- **Upside**: All info in one place makes it easier to find. You can use **CTRL+F** to search for text.
- **Downside**: Need appropriate Adobe product to be able to copy text, and text copied from PDFs sometimes formats strangely.
- To do this:
  1. In Cayuse SP, find your IPF *(see screenshots)*
  2. Click on the **PDF icon** 📄

How to Pull Content from Cayuse SP to Paste into 424

Sample first page of PDF

The Regents of the University of California (Davis) - UC Davis *16647*

Internal Processing Form - Application for Grant, Contract, or Cooperative Agreement

Proposal No:	22-0025	Sponsor Deadline:	12/02/2022 5:00 PM Pacific
Parent Project:	A23-0015	Clinical Trials:	No
Proposal Type:	New	Electronic:	Yes (Cayuse 424)
Instrument Type:	Grant	Primary Administrative Contact:	Amie Admin
Admin Unit:	061821 - OVCR - Sponsored Programs	Affiliated Center/Institute:	

Funding Agency:	NIH National Institute of Allergy and Infectious Diseases (NIAID)	ARRA Funded:	No Answer
Sponsor Program Name:	National Institutes of health NAIAD	Contact Person:	Amie Admin
Opportunity/Sponsor Number:	NIH NIAID PA-19-077	Contact Phone:	530-574-5555
Prime Agency:	NIH National Institute of Allergy and Infectious Diseases (NIAID)	Contact Email:	aadmin@ucdavis.edu

Project Title

Socio-ecological factors in Malaria transmission

Investigators/Research Team

Gary Imaginary - Lead Principal Investigator

Sponsored Effort: 3%	Cost Shared Effort: 0%	Person Months: 0.36	Allocation of Credit: 100%
Dept No: 040331	Dept: Cinema & Digital Media		

Budget

Lead PI: Gary Imaginary		Sponsor: NIH National Institute of Allergy and Infectious Diseases (NIAID)
Budget Form Type: Summary		
# of Budget Periods: 1		
Comments:		

Project Dates:	Current Period	Total Project
Start:	01/01/23	03/01/23
End:	12/31/26	02/28/27

Cost Sharing

Does this proposal include funds or contributions in the form of required cost sharing or required cash matching?

For Internal Cost Sharing: please select "Intl Cost Sharing" as the unit, enter the total amount of all internal cost sharing for the Period and then for Project Total and upload the cost sharing commitment letter(s) in Proposal Attachments.

No