



# Cayuse 424

A Research Administration Workshop

Presented by the UC Davis Sponsored Programs Office (SPO)

October 19, 2023

Instructor: Perry King, SPO Training Officer

# Learning Objectives

By the end of this training, you should...

- 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)



# Training Modules

1. Proposal Submission Process
2. Cayuse 424 Proposals
3. Cayuse Professional Profiles
4. Resources



The background is a repeating pattern of interlocking diamonds. Each diamond is filled with a fine, parallel-line texture. The diamonds are arranged in a grid, with white lines forming the boundaries between them. The overall color palette is various shades of green, from light to dark, with white lines.

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

### 1<sup>ST</sup> STAGE:

**All outgoing proposals must first be routed in Cayuse SP.** Exceptions:

- Pre-proposals that do not require a budget or institutional signature
- 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

### 2<sup>ND</sup> 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

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

5-7 workdays  
before deadline

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

2-3 workdays  
before deadline

PI/Dept incorporates SPO feedback  
PI/Dept finalizes proposal package  
\*\*

1-2 workdays  
before deadline

Final proposal submitted to sponsor  
SPO submits most electronic proposals

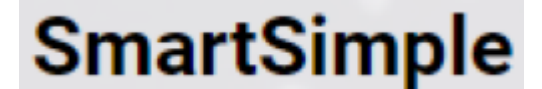
\* Minimum attachments: **Scope of work, budget, and budget justification**. Other attachments may also be required.

- 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**.

# General eRA Tips

- If using an eRA submission system other than Cayuse 424, **register/create an account early.**
  - Account creation can take several days or even a week
  - Registration may require SPO creation or approval
    - Contact [SPOeRAHelp@ucdavis.edu](mailto:SPOeRAHelp@ucdavis.edu) for assistance
- Start the proposal in the eRA submission system **once the IPF is routing** in Cayuse SP.
- **Ensure either the PI or department administrator is available during SPO review** since edits or additional materials may be requested.





# 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 most Federal agencies.

- **Excluded** from Cayuse 424:

- NSF uses [Research.gov](https://www.research.gov)
- NASA uses [NSPIRES](https://www.nspires.gov)



- 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.
  - Allows multiple users to view and edit the proposal simultaneously.
  - 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.

# Professional Profiles in Cayuse 424

## 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.

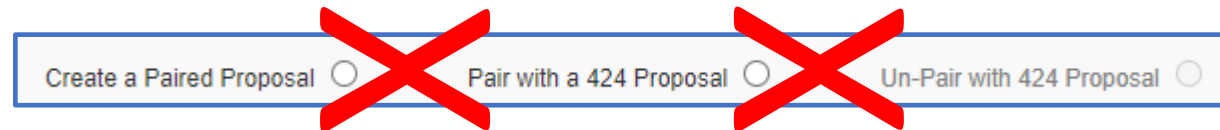
Professional Profiles will be covered in more detail later in this training.

# 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.**



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



CAYUSE 424 PROPOSALS

# Cayuse 424 Front Page

Opportunities

Proposals

Routing

People

Institutions

Reports

More

+ Create Proposal

Import

Proposals List

Search









[Show All](#)

Recently Viewed

[Expand All](#) / [Collapse All](#)

25 ▾ | Page 1 of 1

Displaying 1 to 2 of 2 items

Proposal	Title	PI	Modified	Type	Deadline	
 <a href="#">18-3358 Optimizing Irrigation for Sustainable Production of Almonds, Apples at</a>	Optimizing Irrigation for Sustainable Production of Almonds, Apples at	Shackel, Kenneth	04-12-2023	Specialty Crop Research Initiative Request for P	12-08-2017	  
 <a href="#">24-0147 - Anthony Karnezis - DoD</a>	Role of TP53 P72R SNP in high-grade serous carcinoma	Karnezis, Anthony	07-21-2023	DOD Ovarian Cancer, Pilot Award	07-21-2023	  

**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

## Opportunities

Filter Find More

Show Closed Opportunities

25 Page 1 of 8

Displaying 1 to 25 of 189 items

Opportunity Number	Title	Comp. ID	Comp. Title	Agency	CFDA #	Package ID	Opens	Closes	Downloaded	
PA-20-272	Administrative Supplements to Existing NIH Grants and Cooperative Agree	FORMS-H-ADMINSUPP-K12-KL2-KM1-E	DO NOT USE	National Institutes of Health		PKG00278627	10-13-2020	10-07-2023	08-21-2023	X
PA-20-272	Administrative Supplements to Existing NIH Grants and Cooperative Agree	FORMS-H-ADMINSUPP-INSTRUMENTA	Use for instrumentation grants (e.g., S10)	National Institutes of Health		PKG00278631	10-13-2020	10-07-2023	08-21-2023	X
PA-20-272	Administrative Supplements to Existing NIH Grants and Cooperative Agree	FORMS-H-ADMINSUPP-TRAINING	Use for institutional training (e.g., T's and C	National Institutes of Health		PKG00278628	10-13-2020	10-07-2023	08-21-2023	X
PA-20-272	Administrative Supplements to Existing NIH Grants and Cooperative Agree	FORMS-H-ADMINSUPP-CONSTRUCTIO	Use for construction programs (e.g., CO6, U	National Institutes of Health		PKG00278630	10-13-2020	10-07-2023	08-21-2023	X
PA-20-272	Administrative Supplements to Existing NIH Grants and Cooperative Agree	FORMS-H-ADMINSUPP-RESEARCH	Use for research grants (e.g., R's, DP's), coo	National Institutes of Health		PKG00278787	12-05-2022	10-07-2023	08-21-2023	X
PA-20-272	Administrative Supplements to Existing NIH Grants and Cooperative Agree	FORMS-H-ADMINSUPP-TRAINING-WIT	Use for institutional training (e.g. K12, KL2	National Institutes of Health		PKG00278629	01-22-2022	10-07-2023	08-21-2023	X
PA-20-272	Administrative Supplements to Existing NIH Grants and Cooperative Agree	FORMS-H-ADMINSUPP-CAREERDEV	Use for career development (K's EXCEPT	National Institutes of Health		PKG00278626	10-13-2020	10-07-2023	08-21-2023	X
PA-20-272	Administrative					PKG00278625	10-13-2020	10-07-2023	08-21-2023	X
PAR-20-179	Advancing Re					PKG00277705	11-01-2022	01-07-2024	08-21-2023	X
FOA-RVK-2019-0001	AFRL RV-RD					PKG00247168	12-20-2018	12-19-2023	08-21-2023	X
FA8650-18-S-5010	AFRL/RXC St					PKG00245057	09-20-2018	09-20-2023	08-21-2023	X
USDA-NIFA-AFRI-009842	Agriculture ar					PKG00281458	05-02-2023	12-07-2023	08-21-2023	X
USDA-NIFA-AFRI-009755	Agriculture ar					PKG00279667	02-03-2023	12-29-2023	08-21-2023	X
PA-18-795	AHRQ Health					PKG00278876	12-12-2022	07-08-2024	08-21-2023	X
FA8651-20-S-0008	Air Superiorit					PKG00256362		10-31-2024	08-21-2023	X
PAR-23-026	Ancillary Stud					PKG00278608	03-06-2023	12-05-2025	08-21-2023	X
W911NF-19-S-0004	ARMY APPLI					PKG00250630		05-01-2024	08-21-2023	X
PAR-20-314	Assay Validat					PKG00278424	11-15-2022	10-10-2023	08-21-2023	X
PAR-21-322	Basic Researc					PKG00277777	11-01-2022	09-07-2024	08-21-2023	X
PAR-22-123	Bioengineerin					PKG00277958	11-04-2022	01-07-2025	08-21-2023	X
PAR-22-242	Bioengineerin					PKG00277828	11-01-2022	09-07-2025	08-21-2023	X
PAR-22-243	Bioengineerin					PKG00277829	11-01-2022	09-07-2025	08-21-2023	X
RFA-MH-22-245	BRAIN Initiat					PKG00278467	05-28-2023	10-17-2024	08-21-2023	X

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

Filter Find More  
25 Page 1 of 8

Opportunity Number	Title
PA-20-272	Administrative Supplem
PA-20-272	Administrative Supplem
PA-20-272	Administrative Supplem
PA-20-272	Administrative Supplem
PA-20-272	Administrative Supplem
PA-20-272	Administrative Supplem
PA-20-272	Administrative Supplem
PA-20-272	Administrative Supplem
PAR-20-179	Advancing Research to I
FOA-RVK-2019-0001	AFRL RV-RD Assistance
FA8650-18-S-5010	AFRL/RXC Structural M
USDA-NIFA-AFRI-009842	Agriculture and Food Re
USDA-NIFA-AFRI-009755	Agriculture and Food Re
PA-18-795	AHRQ Health Services R
FA8651-20-S-0008	Air Superiority Technolo
PAR-23-026	Ancillary Studies to Ong
W911NF-19-S-0004	ARMY APPLICATIONS I
PAR-20-314	Assay Validation of High
PAR-21-322	Basic Research in Canc
PAR-22-123	Bioengineering Partners
PAR-22-242	Bioengineering Researc
PAR-22-243	Bioengineering Researc
RFA-MH-22-245	BRAIN Initiative: Engine

Opportunity Details - Google Chrome  
ucdavis.cayuse424.com/1081/opportunityDetails.do?subsessionId=0&id=1038000996

## Opportunity Details

**Opportunity Number:** PA-20-272  
**Opportunity Title:** Administrative Supplements to Existing NIH Grants and Cooperative Agreements (Parent Admin Supp Clinical Trial Optional)  
**Package ID:** PKG00278787  
**Competition Id:** FORMS-H-ADMINSUPP-RESEARCH  
**Competition Title:** Use for research grants (e.g, R's, DP's), cooperative agreement equivalents and endowment programs, P's  
**CFDA Number:**  
**CFDA Description:**  
**Offering Agency:** National Institutes of Health  
**Agency Contact:** eRA Service Desk Monday to Friday 7 am to 8 pm ET <http://grants.nih.gov/support/>  
**Opening Date:** 2022-12-05 00:00:00.0  
**Closing Date:** 2023-10-07 00:00:00.0  
**Schema:** [PKG00278787.xsd](#)  
**Instructions:** [PKG00278787-instructions.pdf](#)

## Forms

Supported Mandatory	Namespace URI
*	<a href="http://apply.grants.gov/forms/PerformanceSite_4_0-V4.0">http://apply.grants.gov/forms/PerformanceSite_4_0-V4.0</a>
*	<a href="http://apply.grants.gov/forms/RR_KeyPersonExpanded_4_0-V4.0">http://apply.grants.gov/forms/RR_KeyPersonExpanded_4_0-V4.0</a>
*	<a href="http://apply.grants.gov/forms/PHS398_CoverPageSupplement_5_0-V5.0">http://apply.grants.gov/forms/PHS398_CoverPageSupplement_5_0-V5.0</a>
*	<a href="http://apply.grants.gov/forms/RR_OtherProjectInfo_1_4-V1.4">http://apply.grants.gov/forms/RR_OtherProjectInfo_1_4-V1.4</a>
*	<a href="http://apply.grants.gov/forms/RR_SF424_5_0-V5.0">http://apply.grants.gov/forms/RR_SF424_5_0-V5.0</a>
*	<a href="http://apply.grants.gov/forms/RR_SubawardBudget10_30_3_0-V3.0">http://apply.grants.gov/forms/RR_SubawardBudget10_30_3_0-V3.0</a>
*	<a href="http://apply.grants.gov/forms/PHSHumanSubjectsAndClinicalTrialsInfo_3_0-V3.0">http://apply.grants.gov/forms/PHSHumanSubjectsAndClinicalTrialsInfo_3_0-V3.0</a>
*	<a href="http://apply.grants.gov/forms/PHS398_ResearchPlan_5_0-V5.0">http://apply.grants.gov/forms/PHS398_ResearchPlan_5_0-V5.0</a>

Visit the sponsor's website and read ALL relevant guidelines

Download Opportunities

Show Closed Opportunities

Displaying 1 to 25 of 189 items

DA #	Package ID	Opens	Closes	Downloaded	
	PKG00278627	10-13-2020	10-07-2023	08-21-2023	✗
	PKG00278631	10-13-2020	10-07-2023	08-21-2023	✗
	PKG00278628	10-13-2020	10-07-2023	08-21-2023	✗
	PKG00278630	10-13-2020	10-07-2023	08-21-2023	✗
	PKG00278787	12-05-2022	10-07-2023	08-21-2023	✗
	PKG00278629	01-22-2022	10-07-2023	08-21-2023	✗
	PKG00278626	10-13-2020	10-07-2023	08-21-2023	✗
	PKG00278625	10-13-2020	10-07-2023	08-21-2023	✗
	705	11-01-2022	01-07-2024	08-21-2023	✗
	168	12-20-2018	12-19-2023	08-21-2023	✗
	057	09-20-2018	09-20-2023	08-21-2023	✗
	PKG00278458	05-02-2023	12-07-2023	08-21-2023	✗
	PKG00279667	02-03-2023	12-29-2023	08-21-2023	✗
	PKG00278876	12-12-2022	07-08-2024	08-21-2023	✗
	PKG00256362		10-31-2024	08-21-2023	✗
	PKG00278608	03-06-2023	12-05-2025	08-21-2023	✗
	PKG00250630		05-01-2024	08-21-2023	✗
	PKG00278424	11-15-2022	10-10-2023	08-21-2023	✗
	PKG00277777	11-01-2022	09-07-2024	08-21-2023	✗
	PKG00277958	11-04-2022	01-07-2025	08-21-2023	✗
	PKG00277828	11-01-2022	09-07-2025	08-21-2023	✗
	PKG00277829	11-01-2022	09-07-2025	08-21-2023	✗
	PKG00278467	05-28-2023	10-17-2024	08-21-2023	✗

# Opportunities Tab

Opportunities

Proposals

Routing

People

Institutions

Reports

More


Download Opportunities

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.

Download Opportunities - Google Chrome

ucdavis.cayuse424.com/1081/admin/retrieveOpportunities.jsp?subsessionId=0&pop=false&userFilterString=

 **Download Opportunities**

To download Federal opportunities, please specify one of the following values. [Search For Opportunities](#)

Opportunity Number:

CFDA #:

Package ID:

If the opportunity is not found, Please email [proposals@ucdavis.edu](mailto:proposals@ucdavis.edu) for assistance.

































600279667	02-03-2023	12-29-2023	08-21-2023	X
600278876	12-12-2022	07-08-2024	08-21-2023	X
600256362		10-31-2024	08-21-2023	X
600278608	03-06-2023	12-05-2025	08-21-2023	X
600250630		05-01-2024	08-21-2023	X
600278424	11-15-2022	10-10-2023	08-21-2023	X
600277777	11-01-2022	09-07-2024	08-21-2023	X
600277958	11-04-2022	01-07-2025	08-21-2023	X
600277828	11-01-2022	09-07-2025	08-21-2023	X
600277829	11-01-2022	09-07-2025	08-21-2023	X
600278467	05-28-2023	10-17-2024	08-21-2023	X



# Start a Proposal

25

Opportunity Num

		PA-20-272
		PA-20-272
		PA-20-272
		PA-20-272
		PA-20-272
		PA-20-272
		PA-20-272
		PAR-20-179
		FOA-RVK-2
		FA8650-18-
		USDA-NIFA
		USDA-NIFA
		PA-18-795
		FA8651-20-
		PAR-23-026
		W911NF-15

- 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 should include:
  - The related **Cayuse SP proposal number**
    - This allows SPO to connect the two
  - The **PI's name**
  - The **Funding Opportunity Number**
    - Example: 24-5555 Apple PA-20-272



## Create Grants.gov Proposal

Opportunity: PA-20-272



Select A Different Opportunity

Proposal Name:



Search for PI

Showing recent PIs | [Show all](#)

Principal Investigator:



Organization:

# of Budget periods:

1  2  3  4  5  6  7  8  9  10

Due Date:



Validation Type:

Create Proposal

Cancel



# 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**.

**Create Grants.gov Proposal**

Opportunity: PA-20-272 [i](#) [Select A Different Opportunity](#)

Proposal Name:  [?](#)

[Search for PI](#)

Showing recent PIs | [Show all](#)

Principal Investigator:

Organization:

# of Budget periods:  1  2  3  4  5  6  7  8  9  10

Due Date:  [📅](#)

Validation Type:

[Create Proposal](#) [Cancel](#)

# 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.

**Create Grants.gov Proposal**

Opportunity: PA-20-272 [i](#) [Select A Different Opportunity](#)

Proposal Name:

[Search for PI](#)

[Show recent](#) | [Show all](#)

**Principal Investigator:** [Carter, Cameron S \(Med: Psychiatry & Behavioral S\) / The Regents of the University of](#)

Organization:

Default IDC Rate:

# of Budget periods:  1  2  3  4  5  6  7  8  9  10

Due Date:

Validation Type:

[Create Proposal](#) [Cancel](#)

# 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.

**Create Grants.gov Proposal**

Opportunity: PA-20-272 ? Select A Different Opportunity

Proposal Name:

Search for PI

[Show recent](#) | [Show all](#)

Principal Investigator: Carter, Cameron S (Med: Psychiatry & Behavioral S) / The Regents of the University of California

Organization: The Regents of the University of California (Davis)

Default IDC Rate: Please select... On Campus Org Research MTDC

# of Budget periods:  1  2  3  4  5

Due Date:

Validation Type: NIH

Create Proposal Cancel

On Campus Org Research MTDC

Please select...

On Campus Other Sponsored Activity MTDC

USDA FRTEP 0%

Test Nonfed IDC 25%TC\_33.333%TDC

Off Campus Org Research MTDC

NIH T Grant 8% MTDC

HRSA Training 8% MTDC

US Dept of Education Training 8.0% MTDC

On Campus Instruction MTDC

Primate Center non\_core

Off Campus Other Sponsored Activity MTDC

OTHER

**On Campus Org Research MTDC**

Off Campus Instruction MTDC

NIH K Grant 8% MTDC

USDA 10 % TDC

USDA\_ NIFA\_AFRI 30% TC \_ to 42.857% TDC

Primate Center Core

Clinical Trial TDC

USDA\_ NIFA\_AFRI 22% to TC\_28.205%\_TDC

# Completing a Proposal

The image shows a vertical navigation menu for a proposal. At the top, there is a checked checkbox next to 'SF424 RR'. Below it are two numbered items, '1' and '2', which are greyed out. The menu continues with several sections, each with a checked checkbox and a '1' below it: 'RR Performance Sites', 'RR Other Project Information', 'RR Key Persons', 'PHS Human Subjects and Clinic', 'RR Subaward Budget Attachme', 'PHS 398 Cover Page Suppleme', 'PHS 398 Research Plan', and 'PHS Assignment Request'. The 'RR Budget' section is highlighted with a green box and has an unchecked checkbox. The 'PHS 398 Modular Budget' section is also highlighted with a green box and has a checked checkbox.

- 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 (1<sup>st</sup> page)

24-0354 Electrically conductive hydrogels for muscle regeneration

APPLICATION FOR FEDERAL ASSISTANCE  
SF 424 R&R

1. TYPE OF SUBMISSION  
 Pre-application  
 Application  
 Changed/Corrected Application

2. DATE SUBMITTED  
08/08/2023

Applicant Identifier

3. DATE RECEIVED BY STATE

State Application Identifier

4. a. Federal Identifier  
AR083112

b. Agency Routing Number  
NOT-AR-23-006

c. Previous Grants.gov Tracking ID

5. APPLICANT INFORMATION

Legal Name: The Regents of the University of California (Davis) UEI: TX2DAGQPENZ5

Department:

Division:

Street1: Office of Research - Sponsored Programs

Street2: 1850 Research Park Drive

City: Davis County/Parish: Yolo

State/Province: California Zip/Postal Code: 95618-6153

Country: United States

Person to be contacted on matters involving this application

Prefix: First Name: Saojane Middle Name: Last Name: Celarbo Suffix:

Position/Title: Contracts and Grants Analyst

Street1: 1850 Research Park Drive

Street2:

City: Davis County/Parish: Yolo

State/Province: California Zip/Postal Code: 95618-6153

Country: United States

Phone Number: 530-752-7188 Fax Number: Email: proposals@ucdavis.edu

Error (0) / Warning (0) / Info (0) NIH Final Review

*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)

- You can use **1 Shields Avenue** as the address, or the address shown.

# Completing a Proposal (1<sup>st</sup> page)

SF424 RR

24-0354 Electrically conductive hydrogels for muscle regeneration

APPLICATION FOR FEDERAL ASSISTANCE  
SF 424 R&R

2. DATE SUBMITTED	08/08/2023	Applicant Identifier	
3. DATE RECEIVED BY STATE		State Application Identifier	
1. TYPE OF SUBMISSION	4. a. Federal Identifier	b. Agency Routing Number	
<input type="radio"/> Pre-application	AR083112	NOT-AR-23-006	
<input checked="" type="radio"/> Application		c. Previous Grants.gov Tracking ID	
<input type="radio"/> Changed/Corrected Application			

5. APPLICANT INFORMATION

Legal Name: The Regents of the University of California (Davis) UEI: TX2DAGQPENZ5

Department: [Redacted]

Division: [Redacted]

Street1: Office of Research - Sponsored Programs

Street2: 1850 Research Park Drive

City: Davis County/Parish: Yolo

State/Province: California Zip/Postal Code: 95618-6153

Country: United States

Person to be contacted on matters involving this application

Prefix: [Redacted] First Name: Saojane Middle Name: [Redacted] Last Name: Celarbo Suffix: [Redacted]

Position/Title: Contracts and Grants Analyst

Street1: 1850 Research Park Drive

Street2: [Redacted]

City: Davis County/Parish: Yolo

State/Province: California Zip/Postal Code: 95618-6153

Country: United States

Phone Number: 530-752-7188 Fax Number: [Redacted] Email: proposals@ucdavis.edu

Error (0) / Warning (0) / Info (0) NIH Final Review

The **Unique Entity Identifier (UEI)** is found on the UC Davis [Institutional Information](#) page.

- It's a good idea to bookmark this helpful page

**Person to be contacted on matters involving this application: Enter your usual SPO Proposals Analyst.**

- If you don't know this individual, enter what you can and add the name later.
- Good email to use here: [proposals@ucdavis.edu](mailto:proposals@ucdavis.edu)

# Completing a Proposal *(bottom half of 1<sup>st</sup> page)*

24-0354 Electrically conductive hydrogels for muscle regeneration

State/Province: California Zip/Postal Code: 95618-6153  
Country: United States

Phone Number: 530-752-7188 Fax Number: Email: proposals@ucdavis.edu

6. EMPLOYER IDENTIFICATION(EIN) or (TIN): 1-946036494-A1  
7. TYPE OF APPLICANT: H: Public/State Controlled Institution of Higher Education  
Other (Specify):

8. TYPE OF APPLICATION:  
 New  
 Resubmission  
 Renewal  
 Continuation  
 Revision  
Small Business Organization Type  
 Women Owned  Socially and Economically Disadvantaged

If Revision, mark appropriate box(es).  
 A. Increase Award  
 B. Decrease Award  
 C. Increase Duration  
 D. Decrease Duration  
 E. Other (specify):

9. NAME OF FEDERAL AGENCY: National Institutes of Health

10. CATALOG OF FEDERAL DOMESTIC ASSISTANCE NUMBER: TITLE:

11. DESCRIPTIVE TITLE OF APPLICANT'S PROJECT: Electrically conductive hydrogels for muscle regeneration

12. PROPOSED PROJECT:  
Start Date: 04/01/2024  
Ending Date: 03/31/2026

13. CONGRESSIONAL DISTRICT OF: Applicant CA-004

Error (0) / Warning (0) / Info (0) NIH Final Review

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 1<sup>st</sup> page)*

The screenshot shows a web-based proposal form. On the left is a navigation sidebar with a tree view containing sections like 'SF424 RR', 'RR Performance Sites', 'RR Other Project Information', 'RR Key Persons', 'RR Budget', 'PHS Human Subjects and Clinical Investigations', 'PHS 398 Modular Budget', 'RR Subaward Budget Attachments', 'PHS 398 Cover Page Supplemental Information', 'PHS 398 Research Plan', and 'PHS Assignment Request'. The main form area is titled '24-0354 Electrically conductive hydrogels for muscle regeneration'. It contains several sections: '6. EMPLOYER IDENTIFICATION(EIN) or (TIN):' with value '1-946036494-A1'; '7. TYPE OF APPLICANT:' with value 'H: Public/State Controlled Institution of Higher Education'; '8. TYPE OF APPLICATION:' with 'Resubmission' selected; '9. NAME OF FEDERAL AGENCY:' with value 'National Institutes of Health'; '10. CATALOG OF FEDERAL DOMESTIC ASSISTANCE NUMBER:' and '11. DESCRIPTIVE TITLE OF APPLICANT'S PROJECT:' with value 'Electrically conductive hydrogels for muscle regeneration'; '12. PROPOSED PROJECT:' with start date '04/01/2024' and ending date '03/31/2026'; and '13. CONGRESSIONAL DISTRICT OF:' with value 'CA-004'. At the bottom, there is a status bar showing 'Error (0) / Warning (0) / Info (0)', a dropdown menu set to 'NIH', and a 'Final Review' button.


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

- Clicking on it will show a list of all current errors and warnings that can prevent a successful proposal submission.
  - Each listed item has a link that can take you to the indicated error/warning for correction.
- Some errors or warnings are “false” errors and do not apply or are based on the standard application for a sponsor and not a 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 (2<sup>nd</sup> page)

24-0354 Electrically conductive hydrogels for muscle regeneration

SF 424 (R&R) APPLICATION FOR FEDERAL ASSISTANCE Page 2

14. PROJECT DIRECTOR/PRINCIPAL INVESTIGATOR CONTACT INFORMATION 

Prefix:  First Name:  Middle Name:  Last Name:  Suffix:

Position/Title:  Organization Name:

Department:

Division:

Street1:

Street2:

City:  County/Parish:

State/Province:  Zip/Postal Code:

Country:

Phone Number:  Fax Number:  Email:

15. ESTIMATED PROJECT FUNDING

a. Total Federal Funds Requested	<input type="text" value="436,842"/>
b. Total Non-Federal Funds	<input type="text" value="0"/> *
c. Total Federal & Non-Federal Funds	<input type="text" value="436,842"/>
d. Estimated Program Income	<input type="text" value="0"/>

16. IS APPLICATION SUBJECT TO REVIEW BY STATE EXECUTIVE ORDER 12372 PROCESS?


a. YES  THIS PREAPPLICATION/APPLICATION WAS MADE AVAILABLE TO THE STATE EXECUTIVE ORDER 12372 PROCESS FOR REVIEW ON: DATE:

b. NO  PROGRAM IS NOT COVERED BY E.O. 12372; OR  PROGRAM HAS NOT BEEN SELECTED BY STATE FOR REVIEW

17. By signing this application, I certify (1) to the statements contained in the list of certifications and (2) that the statements herein are true, complete and accurate to the best of my knowledge. I also provide the required assurances \* and agree to comply with any resulting terms if I accept an award. I am aware that any false, fictitious, or fraudulent statements or claims may subject me to criminal, civil, or administrative penalties. (U.S. Code, Title 18, Section 1001)

Error (0) / Warning (0) / Info (0) NIH  Final Review

## 14. Project Director/PI

Select the  pencil icon to autopopulate 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.*

# Completing a Proposal *(2<sup>nd</sup> page)*

The screenshot shows a web browser window titled "Proposals (S2S) Autofill - Google Chrome". The address bar shows the URL: `ucdavis-uat.cayuse424.com/1067/listPeopleToAutofill.do?subsessionId=0&role=pi&proposalId=1027243227&idsToNotSh`. The main content area is titled "Autofill Principal Investigator" and includes a "Close" button in the top right. Below the title is a search input field with a "Search" button and a "Show All" link. A section titled "5 Recently Autofilled Principal Investigators:" contains a scrollable list of names and affiliations: "Abedi, Mehrdad - UC Davis: Med: Div Of Internal Med", "Apple, Charlie - UC Davis: Med: Intl Med- Hematology & On", "Biscotti, Almona - UC Davis: Nutrition", "Celedon, Juan - University of Pittsburgh: Pediatric Asthma Center", and "Smith, Mackenzie - UC Davis: University Library". To the right of this list is a button with a pencil icon labeled "Add Principal Investigator". On the left side of the browser window, a sidebar menu is visible with various proposal management options, including "SF424 RR", "RR Performance Sit", "RR Other Project In", "RR Key Persons", "RR Budget", "PHS Human Subjec", "PHS 398 Modular B", "RR Subaward Budge", "PHS 398 Cover Pag", "PHS 398 Research I", and "PHS Assignment Re".

## 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 (2<sup>nd</sup> page)

Proposals (S2S) Manage Key Persons - Google Chrome

ucdavis.cayuse424.com/1081/showProposalPage.do?subsessionId=1&url=/manageKeyPeople.do&role=pi&reqPersonId=1...

Manage Principal Investigator Close

Leach, Jonathan - The Regents of the University of California (Davis... Budget Periods:  1  2

Include Performance Site

	Final	Draft	
Biographical Sketch	No final --	No draft --	<span>Add</span> <span>Delete</span>
Current & Pending Support	No final --	No draft --	<span>Add</span> <span>Delete</span>

Role:

Appointment type (months): Calendar:  Academic:  Summer:

Budget	Cal. Salary	Acad. Salary	Sum. Salary	Cal. Months	Acad. Months	Sum. Months	Req. Salary	Fringe Benefits	Funds Requested
prd 1	19,233	0	0				0	0	0
prd 2	19,233	0	0				0	0	0

Error (0) / Warning (0) / Info (0) NIH Final Review

## 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 *(2<sup>nd</sup> page)*

Proposals (S2S) Manage Key Persons - Google Chrome

ucdavis.cayuse424.com/1081/showProposalPage.do?subsessionId=1&url=/manageKeyPeople.do&role=pi&reqPersonId=1...

Manage Principal Investigator Close

Leach, Jonathan - The Regents of the University of California (Davis... Budget Periods:  1  2

Include Performance Site

	Final	Draft	
Biographical Sketch	No final --	No draft --	<span>Add</span> <span>Delete</span>
Current & Pending Support	No final --	No draft --	<span>Add</span> <span>Delete</span>

Role:

Appointment type (months): Calendar:  Academic:  Summer:

Budget	Cal. Salary	Acad. Salary	Sum. Salary	Cal. Months	Acad. Months	Sum. Months	Req. Salary	Fringe Benefits	Funds Requested
prd 1	19,233	0	0				0	0	0
prd 2	19,233	0	0				0	0	0

Error (0) / Warning (0) / Info (0) NIH Final Review

## 14. Project Director/PI

### Important:

The automatic **salary** and **fringe** totals in Cayuse 424 always 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 (2<sup>nd</sup> page)

Proposals (S2S) Manage Key Persons - Google Chrome

ucdavis.cayuse424.com/1081/showProposalPage.do?subsessionId=1&url=/manageKeyPeople.do&role=pi&reqPersonId=1...

Manage Principal Investigator Close

Leach, Jonathan - The Regents of the University of California (Davis... Budget Periods:  1  2

Include Performance Site

	Final	Draft	
Biographical Sketch	No final --	No draft --	<span>Add</span> <span>Delete</span>
Current & Pending Support	No final --	No draft --	<span>Add</span> <span>Delete</span>

Role:

Appointment type (months): Calendar:  Academic:  Summer:

Budget	Cal. Salary	Acad. Salary	Sum. Salary	Cal. Months	Acad. Months	Sum. Months	Req. Salary	Fringe Benefits	Funds Requested
prd 1	19,233	0	0				0	0	0
prd 2	19,233	0	0				0	0	0

Error (0) / Warning (0) / Info (0) NIH Final Review

If you **overwrite** an auto-calculated value, a **red star** will appear.

Requested Salary (\$) 45,000 ★

**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 (2<sup>nd</sup> page)

SF424 RR

24-0354 Electrically conductive hydrogels for muscle regeneration

SF 424 (R&R) APPLICATION FOR FEDERAL ASSISTANCE Page 2

14. PROJECT DIRECTOR/PRINCIPAL INVESTIGATOR CONTACT INFORMATION

Prefix: First Name: Middle Name: Last Name: Suffix:

Jonathan K. Leach

Position/Title: Professor Organization Name: The Regents of the Univ

Department: Med: Orthopedic Surgery

Division: School of Medicine

Street1: 4860 Y Street Suite 3800

Street2:

City: Sacramento County/Parish: Sacramento

State/Province: California Zip/Postal Code: 95817-2307

Country: United States

Phone Number: 916-734-8965 Fax Number: Email: jkleach@ucdavis.edu

15. ESTIMATED PROJECT FUNDING

a. Total Federal Funds Requested	436,842
b. Total Non-Federal Funds	0
c. Total Federal & Non-Federal Funds	436,842
d. Estimated Program Income	0

16. IS APPLICATION SUBJECT TO REVIEW BY STATE EXECUTIVE ORDER 12372 PROCESS?

a. YES  THIS PREAPPLICATION/APPLICATION WAS MADE AVAILABLE TO THE STATE EXECUTIVE ORDER 12372 PROCESS FOR REVIEW ON: DATE:

b. NO  PROGRAM IS NOT COVERED BY E.O. 12372; OR  PROGRAM HAS NOT BEEN SELECTED BY STATE FOR REVIEW

17. By signing this application, I certify (1) to the statements contained in the list of certifications and (2) that the statements herein are true, complete and accurate to the best of my knowledge. I also provide the required assurances \* and agree to comply with any resulting terms if I accept an award. I am aware that any false, fictitious, or fraudulent statements or claims may subject me to criminal, civil, or administrative penalties. (U.S. Code, Title 18, Section 1001)

Error (0) / Warning (0) / Info (0) NIH Final Review

## 14. Project Director/PI

You can manually update autopopulated entries as needed.

# Completing a Proposal (2<sup>nd</sup> page)

24-0354 Electrically conductive hydrogels for muscle regeneration

SF 424 (R&R) APPLICATION FOR FEDERAL ASSISTANCE Page 2

14. PROJECT DIRECTOR/PRINCIPAL INVESTIGATOR CONTACT INFORMATION

Prefix: First Name: Middle Name: Last Name: Suffix:

Jonathan K. Leach

Position/Title: Professor Organization Name: The Regents of the Univ

Department: Med: Orthopedic Surgery

Division: School of Medicine

Street1: 4860 Y Street Suite 3800

Street2:

City: Sacramento County/Parish: Sacramento

State/Province: California Zip/Postal Code: 95817-2307

Country: United States

Phone Number: 916-734-8965 Fax Number: Email: jkleach@ucdavis.edu

15. ESTIMATED PROJECT FUNDING

a. Total Federal Funds Requested	436,842
b. Total Non-Federal Funds	0
c. Total Federal & Non-Federal Funds	436,842
d. Estimated Program Income	0

16. IS APPLICATION SUBJECT TO REVIEW BY STATE EXECUTIVE ORDER 12372 PROCESS?

a. YES  THIS PREAPPLICATION/APPLICATION WAS MADE AVAILABLE TO THE STATE EXECUTIVE ORDER 12372 PROCESS FOR REVIEW ON:

DATE:

b. NO  PROGRAM IS NOT COVERED BY E.O. 12372; OR  PROGRAM HAS NOT BEEN SELECTED BY STATE FOR REVIEW

17. By signing this application, I certify (1) to the statements contained in the list of certifications and (2) that the statements herein are true, complete and accurate to the best of my knowledge. I also provide the required assurances \* and agree to comply with any resulting terms if I accept an award. I am aware that any false, fictitious, or fraudulent statements or claims may subject me to criminal, civil, or administrative penalties. (U.S. Code, Title 18, Section 1001)

Error (0) / Warning (0) / Info (0) NIH Final Review

## 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 2<sup>nd</sup> page)*

24-0354 Electrically conductive hydrogels for muscle regeneration

### 19. Authorized Representative

Prefix: [ ] First Name: [ Saojane ] Middle Name: [ ] Last Name: [ Celarbo ] Suffix: [ ]

Position/Title: [ Contracts and Grants Analyst ] Organization: [ The Regents of the University of California (D ]

Department: [ OVCR - Sponsored Programs ]

Division: [ VC Research ]

Street1: [ 1850 Research Park Drive ]

Street2: [ ]

City: [ Davis ] County/Parish: [ Yolo ]

\* State/Province: [ California ] Zip/Postal Code: [ 95618-6153 ]

Country: [ United States ]

Phone Number: [ 530-752-7188 ] Fax Number: [ ] Email: [ scelarbo@ucdavis.edu ]

Signature of Authorized Representative [ Saojane Celarbo ] Date Signed [ 08/08/2023 ]

	Final	Draft	
20. Pre-application	No final --	No draft --	[ Add ] [ Delete ]
21. Cover Letter Attachment	<a href="#">CoverLetter</a> 1P PDF 78.87KB	No draft --	[ Manage ] [ Delete ]

Error (0) / Warning (0) / Info (0) NIH [ ] Final Review

**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.


# Completing a Proposal *(RR Performance Sites page)*



24-0354 Electrically conductive hydrogels for muscle regeneration

### Project/Performance Site Location(s)



**Project/Performance Site Primary Location**  

Organization: The Regents of the University of California, Davis  
UEI: TX2DAGQPENZ5  
\* Street1: 4860 Y Street Suite 3800 Street2:  
\* City: Sacramento County/Parish: Sacramento  
\* State/Province: California \* Zip/Postal Code: 95817-2307  
\* Country: United States  
\* Project/Performance Site Congressional District: CA-007

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

**Other Site 1**  

Organization: The Regents of the University of California (Davis)  
UEI: TX2DAGQPENZ5  
\* Street1: Office of Research - Sponsored Programs Street2: 1850 Research Park Drive  
\* City: Davis County/Parish: Yolo  
\* State/Province: California \* Zip/Postal Code: 95618-6153  
\* Country: United States  
\* Project/Performance Site Congressional District: CA-004

**Other Site 2**  

Organization: Georgia Institute of Technology  
UEI: EMW9FC8J3HN4  
\* Street1: 313 Ferst Ave NW Street2:  
\* City: Atlanta County/Parish:  
\* State/Province: Georgia \* Zip/Postal Code: 303320415  
\* Country: United States  
\* Project/Performance Site Congressional District: GA-005

Error (0) / Warning (0) / Info (0) NIH Final Review

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)*

24-0354 Electrically conductive hydrogels for muscle regeneration

### RESEARCH & RELATED Other Project Information

1. \* Are Human Subjects Involved?  Yes  No

1.a. If YES to Human Subjects  
Is the Project Exempt from Federal regulations?  Yes  No  
If yes, check the appropriate exemption number:  
Exemption Number:  1  2  3  4  5  6  7  8  
If no, is the IRB review Pending?  Yes  No  
IRB Approval Date:   
Human Subject Assurance Number:

2. \* Are Vertebrate Animals Used?  Yes  No

2.a. If YES to Vertebrate Animals  
Is the IACUC review Pending?  Yes  No  
IACUC Approval Date:   
Animal Welfare Assurance Number

3. \* Is proprietary/privileged information included in the application?  Yes  No

4.a. \* Does the Project have an Actual or Perceived Impact - positive or negative - on the environment?  Yes  No

4.b. If yes, please explain:

4.c. If this project has an actual or potential impact on the environment, has an exemption been authorized or an environmental assessment (EA) or environmental impact statement (EIS) been performed?  Yes  No

4.d. If yes, please explain:

5.a. \* Is the research performance site designated, or eligible to be designated, as a historic place?  Yes  No

5.b. If yes, please explain:

6.a. \* Does this project involve activities outside the U.S. or partnership with International Collaborators?  Yes  No

6.b. If yes, identify countries:

6.c. Optional Explanation:

Final | Draft

7. Project Summary/Abstract	ProjectSummary	No draft	Manage	Delete
	1P   PDF   24.44KB	--		

Error (0) / Warning (0) / Info (0) | NIH | Final Review

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)*

The screenshot shows a web application interface for managing proposal key persons. On the left is a sidebar with a tree view of proposal sections, including 'SF424 RR', 'RR Performance Sites', 'RR Other Project Information', 'RR Key Persons', 'RR Budget', 'PHS Human Subjects and Clinic', 'PHS 398 Modular Budget', 'RR Subaward Budget Attachme', 'PHS 398 Cover Page Suppleme', 'PHS 398 Research Plan', and 'PHS Assignment Request'. The 'RR Key Persons' section is selected. The main content area displays the title '24-0354 Electrically conductive hydrogels for muscle regeneration' and the heading 'RESEARCH & RELATED Senior/Key Person Profile'. Below this, it shows 'PROFILE - Project Director/Principal Investigator' with a profile for 'Leach, Jonathan K. - The Regents of the University of California (Davis) - PD/PI'. Underneath is 'PROFILE - Senior/Key Person' showing a list of two key persons: 'Smith, Lucas - The Regents of the University of California (Davis) - Co-Investigator' and 'Panitch, Alyssa - Georgia Institute of Technology - Co-Investigator'. Each profile has a pencil icon for editing and a red 'X' icon for deletion. At the bottom of the main area, there is a status bar with 'Error (0) / Warning (0) / Info (0)', a dropdown menu set to 'NIH', and a 'Final Review' button.

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)*

The screenshot shows a web browser window titled "Proposals (S2S) Autofill - Google Chrome" with the URL "ucdavis.cayuse424.com/1081/listPeopleToAutofill.do?subsessionId=1&role=kp&proposalId=1041329397&idsToNotSho". The main heading is "Add Key Person to Proposal" with a "Close" button. Below the heading is a search bar with a "Search" button and a "Show All" link. A message states "0 Available Recently Autofilled Key Persons (try Search or Show All):" above a large empty list box. To the right of the list box is a button labeled "Add Selected Key Person". At the bottom of the list box is the text "Or..." followed by a button labeled "Create New Professional Profile". A sidebar on the left contains a navigation menu with items like "SF424 RR", "RR Performance Sites", "RR Other Project Information", "RR Key Persons", "RR Budget", "PHS Human Subjects and Clin", "PHS 398 Modular Budget", "RR Subaward Budget Attachm", "PHS 398 Cover Page Supplem", "PHS 398 Research Plan", and "PHS Assignment Request". At the bottom of the browser window, there are status bars for "Error (0) / Warning (0) / Info (0)", "NIH", and "Final Review".

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](mailto:ORCayuseHelp@ucdavis.edu).

- We'll cover in later slides what info you should provide.

# Completing a Proposal *(RR Key Persons)*

Proposals (S2S) Manage Key Persons - Google Chrome

ucdavis.cayuse424.com/1081/showProposalPage.do?subsessionId=1&url=/manageKeyPeople.do&role=kp&reqPersonId=...

Manage Key Person Close

Robinson, Duane - The Regents of the University of California (Davis...)

Budget Periods:  1  2

Include Performance Site

Final | Draft

Biographical Sketch

No final | No draft

-- | --

Add Delete

Current & Pending Support

No final | No draft

-- | --

Add Delete

Role: Please Select...

Other Project Role Category:

Appointment type (months): Calendar:  Academic:  Summer:

Budget	Cal. Salary	Acad. Salary	Sum. Salary	Cal. Months	Acad. Months	Sum. Months	Req. Salary	Fringe Benefits	Funds Requested
prd 1	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
prd 2	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>

Error (0) / Warning (0) / Info (0) NIH Final Review

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:

- Please Select...
- PD/PI
- Co-PD/PI
- Co-Investigator
- Faculty
- Post Doctoral
- Post Doctoral Associate
- Post Doctoral Scholar
- Other Professional
- Graduate Student
- Undergraduate Student
- Technician
- Consultant
- Other (Specify)

- For NIH: Select **Co-Investigator** or **Collaborator**, but not **Other Professional**

# Completing a Proposal *(RR Key Persons)*

RESEARCH & RELATED Senior/Key Person Profile

PROFILE - Project Director/Principal Investigator

Leach, Jonathan K. - *The Regents of the University of California (Davis)* - PD/PI

PROFILE - Senior/Key Person

2 Senior/Key Persons [expand all](#) / [collapse all](#) [Sort](#) **Manage Key Persons**

Smith, Lucas - *The Regents of the University of California (Davis)* - Co-Investigator

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

These are available options:

Proposals (S2S) Manage Key Persons - Google Chrome

ucdavis.cayuse424.com/1081/showProposalPage.do?subsessionId=2&url=/manageKeyPeople.do&pop=true&role=kp&prop...

Manage 3 Key Persons Viewing Alphabetically [Close](#)

[Add Key Person](#)

	Leach, Jonathan - <i>The Regents of the University of California (Davis)...</i>	Budget Periods: <input checked="" type="checkbox"/> 1 <input checked="" type="checkbox"/> 2
<input type="checkbox"/>	<input type="checkbox"/> Include Performance Site	
	Panitch, Alyssa - Georgia Institute of Technology	Budget Periods: <input checked="" type="checkbox"/> 1 <input checked="" type="checkbox"/> 2
	Smith, Lucas - <i>The Regents of the University of California (Davis)...</i>	Budget Periods: <input checked="" type="checkbox"/> 1 <input checked="" type="checkbox"/> 2

- (Re)visit effort screen
- Visit Professional Profile
- Re-autofill from Profile
- Remove from proposal

# Completing a Proposal *(RR Budget page 1)*

24-0354 Electrically conductive hydrogels for muscle regeneration

RESEARCH & RELATED BUDGET - SECTION A & B Budget Period 1 of 2

UEI: TX2DAGQPENZ5

Budget Type:  Project  Subaward/Consortium

Enter name of Organization: The Regents of the University of California (Davis)

Period 1 Start Date: 04/01/2024 End Date: 03/31/2025

A. Senior/Key Persons in Budget Period 1 of 2 Manage Key Persons

First Pref. Name	Mid. Name	Last Name	Project Suf.	Role	Base Salary (\$)	Cal. Salary (\$)	Acad. Salary (\$)	Sum. Salary (\$)	Cal. Mons	Acad. Mons	Sum. Mons	Requested Salary (\$)	Fringe Benefits (\$)	Funds Req. (\$)
Jonathan	KC	Leach		PD/PI			0	0				0	0	0
Lucas		Smith					0	0				0	0	0
Alyssa		Panitch			0	0	0	0				0	0	0


Total Senior/Key Person 0


B. Other Personnel


* Number of Personnel	* Project Role	Cal. Months	Acad. Months	Sum. Months	* Requested Salary (\$)	* Fringe Benefits (\$)	* Funds Requested (\$)
	Post Doctoral Associates						
	Graduate Students						
	Undergraduate Students						
	Secretarial / Clerical						

Error (0) / Warning (0) / Info (0) NIH Final Review

## 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 2<sup>nd</sup> 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**.



# Completing

24-0354 Electric

UEI: TX2DAGQPENZ5

Budget Type:  Project

Enter name of Organization

Period 1 Start Date: 04

A. Senior/Key Persons Information

First Pref Name	Mid Name
Jonathan	K.
Lucas	
Alyssa	

B. Other Personnel

* Number of Personnel	* Project Post Doc
	Graduat
	Undergrn
	Secretar

select all | unselect all

Error (0) / Warning (0) /

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

Start Period: Budget Period 1 thru End Period: 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.**

# Completing a Proposal *(RR Budget page 1)*

We leave Cayuse 424 for a moment.

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

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.

Start Date:		4/1/2024		NIH	Title:		The differing effects of Neuroleinin-1 (NL1) on female versus male physiology					End Date:		3/31/2028		PI(s):		Phil Stewart		12 Months	
PERSONNEL		Salary Basis			*		Period 1														
Name/Role:		Annual Salary			Project Period % Effort					Salary Basis and Type		Escal		4/1/24-3/31/25							
		Base	Summer	Total	Per 1	Per 2	Per 3	Per4	Per5												
1	Phil Stewart	202,080		202,080	15.0%	15.0%	15.0%	15.0%		CAL 12/12	3%	30,994									
2	Stephen Robinson - AY	230,700	76,900	307,600	7.5%	7.5%	7.5%	7.5%		AY 9/12	3%	23,589									
3	Stephen Robinson -SMR	230,700	76,900	307,600	1.67%	1.67%	1.67%	1.67%		SMR 9/12	3%	5,242									
4	Kalindi Vora	181,998		181,998	7.5%	7.5%	7.5%	7.5%		AY 9/12	3%	13,957									
5	GSR - TBD	39,906		39,906	3.75%	3.75%	3.75%	3.75%		AY 9/12	3%	1,530									
6	GSR - TBD	39,906		39,906	3.75%	3.75%	3.75%	3.75%		AY 9/12	3%	1,530									
<b>Total Salaries</b>													<b>76,842</b>								
		<b>FY Split:</b>		3/9		3/9		3/9		3/9		0/0									
<b>Benefits by Person</b>		<b>UCPath CBR Group</b>		%		%		%		%		%		<b>Period 1</b>							
1	Phil Stewart	HCOMP Faculty & SMG		26.8/27.6		27.6/28.4		28.4/29.3		29.3/30.2		8,492									
		Safety		39.6/40.8		40.8/42		42/43.3		43.3/44.6		9,554									
				8.8/9.1		9.1/9.4		9.4/9.7		9.7/10		461									
		Safety		39.6/40.8		40.8/42		42/43.3		43.3/44.6		5,653									

Personnel Reference tab:

Personnel (For Reference)			Custom Escalations <i>(Choose "Custom" in column O on the "Request" sheet to use these rates)</i>					Base Salary (For agency forms) <i>Based on Request Column F for AY and SMR; Request Column H for CAL Salary below includes pre-escalation when using FY escalations</i>													
Name/Role:			Personnel Type? (Choose Below)		P1	P2	P3	P4	P5	Period 1		Period 2		Period 3		Period 4		Period 5		Appointment Type/Basis	
										Base/AY	Summer	Base/AY	Summer	Base/AY	Summer	Base/AY	Summer	Base/AY	Summer		
1	Phil Stewart	Senior/Key								206,627		212,826		219,210		225,787				12	/12
2	Stephen Robinson - AY	Senior/Key								235,891	78,630	242,967	80,989	250,256	83,419	257,764	85,921			9	/12
3	Stephen Robinson -SMR	Senior/Key								235,891	78,630	242,967	80,989	250,256	83,419	257,764	85,921			9	/12
4	Kalindi Vora	Senior/Key								186,093		191,676		197,426		203,349				9	/12
5	GSR - TBD	Other								40,804		42,028		43,289		44,588				9	/12
6	GSR - TBD	Other								40,804		42,028		43,289		44,588				9	/12

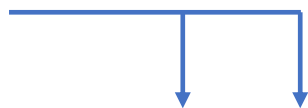
99	Cell culture reagents. We request the needed supplies for growing the human iPSC cells and organoids: media, growth factors, other additives	15,000
100	Nucleic acid isolation and analysis. We also have requested RNA and DNA isolation and analysis reagents including for qPCR	6,000
101	Antibodies, IHC reagents, Western materials	7,500
102		28,500

# Completing a Proposal *(RR Budget page 1)*

## Pro Tip:

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 summer or academic year field to avoid warnings. Example:



Project iuf. Role	Base Salary (\$)	Cal. Salary Acad. Salary (\$)	Sum. Salary (\$)	Cal. Acad. Sum. Mons Mons Mons	Requested Salary (\$)
PD/PI	150,000		150,000	0,000 2,000	33,333

These three fields do not go to the sponsor (they are internal fields). Cayuse, however, creates a warning if the sum of these does not equal base salary. Therefore, paste the base salary into either summer or acad salary and then fill in the acad or summer months effort or both.

- This way, base salary / 9 (or 11) x months effort = amount requested, and there will be no warnings.  
Example:  $\$150,000 / 9 \times 2 = \$33,333$
- Otherwise, warnings can be ignored.

# Completing a Proposal *(RR Budget page 1)*

24-0354 Electrically conductive hydrogels for muscle regeneration

RESEARCH & RELATED BUDGET - SECTION A & B Budget Period 1 of 2

UEI: TX2DAGQPENZ5

Budget Type:  Project  Subaward/Consortium

Enter name of Organization: The Regents of the University of California (Davis)

Period 1 Start Date: 04/01/2024 End Date: 03/31/2025

A. Senior/Key Persons in Budget Period 1 of 2 Manage Key Persons

First Pref. Name	Mid. Name	Last Name	Project Suf.	Project Role	Base Salary (\$)	Cal. Salary (\$)	Acad. Salary (\$)	Sum. Salary (\$)	Cal. Mons	Acad. Mons	Sum. Mons	Requested Salary (\$)	Fringe Benefits (\$)	Funds Req. (\$)
Jonathan	K	Leach		PD/PI			0	0				0	0	0
Lucas		Smith					0	0				0	0	0
Alyssa		Panitch			0	0	0	0				0	0	0

Total Senior/Key Person 0

B. Other Personnel

* Number of Personnel	* Project Role	Cal. Months	Acad. Months	Sum. Months	* Requested Salary (\$)	* Fringe Benefits (\$)	* Funds Requested (\$)
	Post Doctoral Associates						
	Graduate Students						
	Undergraduate Students						
	Secretarial / Clerical						

Indirect Cost Types for Sections A and B Above:

Total Number Other Personnel:

On Campus  On Campus

Total Other Personnel

Total Salary, Wages and Fringe Benefits (A+B) 13,591

Error (7) / Warning (4) / Info (0) NIH Final Review

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)*

RESEARCH & RELATED BUDGET - SECTION F - L Budget Period 1 of 2

Indirect Cost Type	Indirect Cost Rate (%)	Indirect Cost Base (\$)	* Funds Requested (\$)
1. On Campus Org Research MTDC	60.571	10,543	6,386
2.			
3.			
4.			

Total Indirect Costs 6,386

I. Total Direct and Indirect Costs Funds Requested (\$) 41,929

J. Fee Funds Requested (\$)

You will likely 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 1<sup>st</sup> part of the budget period was combined with 61% for the 2<sup>nd</sup> 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	<b>Start Date:</b>		4/1/2024		NIH	<b>Title:</b>		The differing effects of Neuroleinin-1 (NL1) on female versus male physiology								
2	<b>End Date:</b>		3/31/2028			<b>PI(s):</b>		Phil Stewart								12 Months
4	<b>PERSONNEL</b>											<b>Salary Basis</b>	*			
6	<b>Name/Role:</b>		<b>Annual Salary</b>			<b>Project Period % Effort</b>					<b>Salary Basis and Type</b>	<b>Escal</b>	<b>Period 1</b>			
8	1	Phil Stewart	202,080		202,080	15.0%	15.0%	15.0%	15.0%		CAL 12/12	3%	30,994			
9	2	Stephen Robinson - AY	230,700	76,900	307,600	7.5%	7.5%	7.5%	7.5%		AY 9/12	3%	23,589			
10	3	Stephen Robinson -SMR	230,700	76,900	307,600	1.67%	1.67%	1.67%	1.67%		SMR 9/12	3%	5,242			
11	4	Kalindi Vora	181,998		181,998	7.5%	7.5%	7.5%	7.5%		AY 9/12	3%	13,957			
12	5	GSR - TBD	39,906		39,906	3.75%	3.75%	3.75%	3.75%		AY 9/12	3%	1,530			
13	6	GSR - TBD	39,906		39,906	3.75%	3.75%	3.75%	3.75%		AY 9/12	3%	1,530			
32	<b>Total Salaries</b>													<b>76,842</b>		
35	<b>Benefits by Person</b>		<b>UCPath CBR Group</b>		<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>								
36	1	Phil Stewart	HCOMP Faculty & SMG		26.8/27.6	27.6/28.4	28.4/29.3	29.3/30.2								
37	2	Stephen Robinson - AY	Faculty, Acad, MSP, Safety		39.6/40.8	40.8/42	42/43.3	43.3/44.6								
38	3	Stephen Robinson -SMR	Faculty Summer-A		8.8/9.1	9.1/9.4	9.4/9.7	9.7/10								
39	4	Kalindi Vora	Faculty, Acad, MSP, Safety		39.6/40.8	40.8/42	42/43.3	43.3/44.6								
40	5	GSR - TBD	Grad and Undergrad		2.2/2.3	2.3/2.4	2.4/2.5	2.5/2.6								
41	6	GSR - TBD	Grad and Undergrad		2.2/2.3	2.3/2.4	2.4/2.5	2.5/2.6								
60	<b>Total Benefits</b>															
61	<b>Total Personnel</b>															
63	<b>EQUIPMENT</b>															
64	Unique software developed for neon electroporation															
73	<b>Total Equipment</b>															
75	<b>TRAVEL</b>															
76	Travel to/from NASA Ames Research Center (Silicon Valley) for all personnel & 120 volunteers (30 per year)															
77	NASA DC-9 research flights (6/yr x \$20K/flight)															
78	Attending Society for Motion Sickness Meeting and possibly the annual ISSCR meeting															
84	<b>Total Direct</b>															
85	<b>Total Indirect</b>															
86	<b>Total Travel</b>															
97	<b>OTHER DIRECT COSTS</b>															
98	<b>Materials and Supplies</b>													<b>Period 1</b>		
99	Cell culture reagents. We request the needed supplies for growing the human iPSC cells and organoids: media, growth factors, other additives													15,000		
100	Nucleic acid isolation and analysis. We also have requested RNA and DNA isolation and analysis reagents including for qPCR													6,000		
101	Antibodies, IHC reagents, Western materials													7,500		

**F&A Details tab:**

Indirect Cost Split for Sponsor Forms		Project Period 1	
<b>Request Budget</b>		<b>2/1/24-6/30/24</b>	<b>7/1/24-1/31/25</b>
Base Type: MTDC		60.0%	61.0%
Base		4,500	6,043
Indirect Costs		2,700	3,686
<b>Primate Center Rates:</b>			
Primate Center Base			
Primate Center F&A:			
<b>Total Annual Requested Indirect</b>		<b>\$ 6,386</b>	

# Completing a Proposal *(RR Budget page 3)*

eRA class sample: 21-0099 Apple PA-EO-777

RESEARCH & RELATED BUDGET - SECTION F - L Budget Period 1 of 2

7. Alterations and Renovations

8. GSR fee/tuition

9.

10.

Total Other Direct Costs

G. Direct Costs Funds Requested (\$)

Total Direct Costs (A thru F)

H. Indirect Costs Note: Indirect Cost types are defined in the Institutional Profile, under the Institutions tab. Bring any profile changes into budget by refreshing Applicant Organization.

Indirect Cost Type	Indirect Cost Rate (%)	Indirect Cost Base (\$)	* Funds Requested (\$)
1. On Campus Org Research MTDC	60.000	4,500	2,700
2. On Campus Org Research MTDC	61.000	6,043	3,686
3. <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
4. <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Total Indirect Costs

Cognizant Federal Agency   
(Agency Name, POC Name, and POC Phone Number)

I. Total Direct and Indirect Costs Funds Requested (\$)

Total Direct and Indirect Institutional Costs (G + H)

J. Fee Funds Requested (\$)

Error (15) / Warning (3) / Info (0) NIH  Final Review

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

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

# Completing a Proposal

eRA class sample: 21-0099 Apple PA-EO-777

## Proposal Summary

Proposal Number:  Proposal Status:

Sponsor Deadline:  Submission Method:

Submission Date:  Submitted By:

Award Number:  Award Date:  Contract Number:

### INVESTIGATOR DATA

#### PROJECT DIRECTOR / PRINCIPAL INVESTIGATOR CONTACT INFORMATION

Prefix:  \* First Name:  Middle Name:  \* Last Name:  Suffix:

Position/Title:  Organization:

Department:

Division:

Street1:  Street2:

City:  County:

State:  Zip Code:

Country:  Employee ID:

Phone:

Fax:

Email:

First Budget Period Effort

Calendar	Academic	Summer
<input type="text"/>	<input type="text" value="0.36"/>	<input type="text" value="0.00"/>

Status of PI:  Status Waiver Required?  Yes  No

Signed Intellectual Property Waiver Attached?  Yes  No

Error (15) / Warning (3) / Info (0) NIH  Final Review

Ignore the **Proposal Summary**.

It is not needed and can cause unnecessary confusion.



# Completing a Proposal

Proposals List > 24-0354 Electrically conductive hydrogels for muscle regeneration << Proposals List

24-0354 Electrically conductive hydrogels for muscle regeneration

## Proposal Permissions

[+ Add user](#)

	List	Read	Write	Delete	Attach	Change Permissions	Add User	Remove User	Break Lock	Print	Su
Leach, Jonathan K. (jkleach@ucdavis.edu)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Misewich, Sharon B (sharon23@ucdavis.edu)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Solorio-Lopez, Alejandra (asolopez@ucdavis.edu)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

**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.

Error (0) / Warning (0) / Info (0) NIH Final Review

# Completing a Proposal

Proposals List > 24-0354 Electrically conductive hydrogels for muscle regeneration << Proposals List

24-0354 Electrically conductive hydrogels for muscle regeneration


## Routing & Approval

Routing Chain + X ↓... Edit Chain?

**Begin**

Leach, Jonathan K. - UC Davis: Med: Orthopedic Surgery

**End**

 There is no AOR on this routing chain. The proposal will not be submittable until an AOR has been added to the chain and has approved the proposal.

### Routing History

username	person	type	date/time	comments
asolopez@ucdavis.edu		Modify	2023-08-04 14:39	Auto-built chain at create time from PI

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

Error (0) / Warning (0) / Info (0) NIH Final Review

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

# Completing a Proposal

Proposals List > 24-0354 Electrically conductive hydrogels for muscle regeneration << Proposals List

24-0354 Electrically conductive hydrogels for muscle regeneration

## ⚡ Electronic Submission

### ⊕ Opportunity Details

### ⊕ Proposal Submission History

⊖ Electronic Submission

**Submission Target** <https://ws07.grants.gov:443/grantsws-applicant/services/v2/ApplicantWebServicesSoapPort>

To submit this proposal electronically, press the button below. Please be prepared to wait for the submission to complete before continuing work on this proposal. Your submission will be recorded in the Proposal Submission History above

(Run final validation checks - **recommended**.)

Submit to Grants.gov after validation

**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.

Error (0) / Warning (0) / Info (0) NIH Final Review

# Completing a Proposal

Proposals List > 24-0354 Electrically conductive hydrogels for muscle regeneration << Proposals List

24-0354 Electrically conductive hydrogels for muscle regeneration

### Proposal Permissions

List Read Write Delete Attach Change Add Remove Break Print Su  
Permissions User User Lock

Proposal Quick Link - Google Chrome

ucdavis-uat.cayuse424.com/1067//showProposalQuickLink.do?subsessionId=3&proposalId=1026761739

### Proposal Quick Link

**For proposal: 24-0354 Electrically conductive hydrogels for muscle regeneration**

<http://ucdavis.cayuse424.com/1081/proposal.do?proposalId=1026761739>

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

Error (0) / Warning (0) / Info (0) NIH Final Review

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

# Exiting a Proposal

The screenshot shows a web application interface for exiting a proposal. The main window displays the 'Electronic Submission' details for proposal 24-0354, 'Electrically conductive hydrogels for muscle regeneration'. A modal dialog titled 'Take proposal lock?' is open, asking if the user wants to take the lock for the proposal. The dialog includes a warning icon, a title, a message about the proposal being locked, and three buttons: 'Take Lock', 'Open Proposal Read-only', and 'Cancel'. The background application has a sidebar with navigation options like 'RR Key Persons', 'RR Budget', 'PHS Human Subjects and Clinic', etc. The top navigation bar shows 'Proposals List' and '24-0354 Electrically conductive hydrogels for muscle regeneration'. The bottom status bar shows 'Error (0) / Warning (0) / Info (0)', 'NIH', and 'Final Review'.

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.

# Activity 1: Prepare a Proposal in Cayuse 424

- Login to Cayuse “sandbox” (UAT):  
<https://ucdavis-uat.cayuse424.com>  
*(copy from Zoom chat)*
  - Username: amieadmin
  - Password: training
- Select **Cayuse 424**
- If you’re unable to access the UAT:
  - Try incognito mode
  - Try another web browser (like Firefox)





# Activity 1: Prepare a Proposal in Cayuse 424

The opportunities in the UAT “sandbox” have all closed. Therefore, check this box to reveal them.

Opportunities

Show Closed Opportunities

25 ▾  Page 1 of 1 

Displaying 1 to 25 of 25 items

Opportunity Number	Title ▲	Comp. ID	Comp. Title	Agency	CFDA #	Package ID	Opens	Closes	Downloaded
--------------------	---------	----------	-------------	--------	--------	------------	-------	--------	------------

**Not finding what you're looking for?**  
Try "Find More", or use the "Download Opportunities" button to find and download more Opportunities.

# Activity 1: Prepare a Proposal in Cayuse 424

**RFA:** PA-EO-777 R01 [NIH]

**Proposal Name:** Your Proposal # [; i.e. 22-1442] Apple PA-EO-777 R01

**Project Title:** Socio-ecological factors in Malaria transmission

**Sponsor Deadline:** 8/1/24 (5pm local time)

**Project Dates:** 1/1/2025 – 12/31/2026

**Person to be Contacted:** Amie Admin

**IRB Application #:** 123456, approved 4/10/23

**IACUC Protocol:** 235678, approved 4/1/23 (bovine)

**Location of activity:** Animal Husbandry Beef Barn (75%), DNA Technologies & Expression Analysis Cores (25%)

**Instrument Type:** Grant

**Activity Code:** Basic Research

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, 0.36 Person-Months (\$130,000 Cal salary)	\$ 3,900	\$ 4,017	\$ 7,917
<b>Salary Total</b>	<b>\$ 8,400</b>	<b>\$ 8,652</b>	<b>\$ 17,052</b>
Charlie Apple, PI	\$ 1,782	\$ 1,835	\$ 3,617
Gary Imaginary, Co-PI	\$ 995	\$ 1,024	\$ 2,019
<b>Benefits Total</b>	<b>\$ 2,777</b>	<b>\$ 2,859</b>	<b>\$ 5,636</b>
<b>PERSONNEL TOTAL</b>	<b>\$11,177</b>	<b>\$11,511</b>	<b>\$22,688</b>
MRI	\$25,000	\$ 0	\$25,000
<b>EQUIPMENT TOTAL</b>	<b>\$25,000</b>	<b>\$ 0</b>	<b>\$25,000</b>
<b>TOTAL DIRECT COSTS</b>	<b>\$36,177</b>	<b>\$11,511</b>	<b>\$47,688</b>
Indirect Cost Base	\$11,177	\$11,511	\$22,688
Indirect Costs (MTDC Split Rate: 60/61%)	\$ 6,762	\$ 7,022	\$13,784
<b>TOTAL PROJECT COSTS</b>	<b>\$42,939</b>	<b>\$18,533</b>	<b>\$61,472</b>



# Preparing a Subaward Proposal

## Proposals List










 Search

[Show All](#)

Recently Viewed

[Expand All / Collapse All](#)

25 ▾ Page 1 of 1

Proposal	Title	PI	Modified	Type	Deadline	
  <a href="#">R 18-3358 Optimizing Irrigation for Sustainable Production of Almonds</a>	Optimizing Irrigation for Sustainable Production of Almonds, Apples a	Shackel, Kenneth	04-12-2023	Specialty Crop Research Initiative Request for P	12-08-2017	 
   <a href="#">R 24-0147 - Anthony Karnezis - DoD</a>	Role of TP53 P72R SNP in high-grade serous carcinoma	Karnezis, Anthony	07-21-2023	DOD Ovarian Cancer, Pilot Award	07-21-2023	 

Displaying 1 to 2 of 2 items

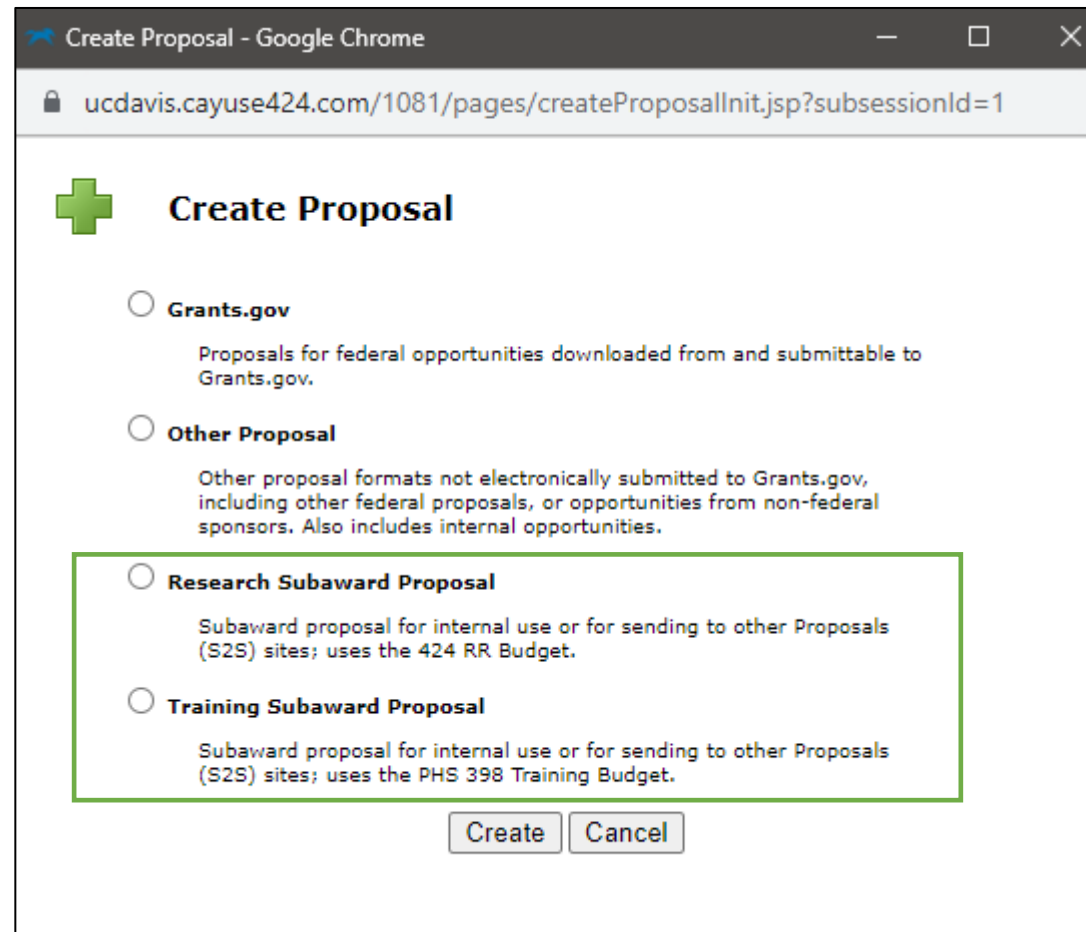
As described earlier, when UC Davis is a subrecipient on another institution's proposal, start the subaward proposal by clicking **+ Create Proposal**.

- 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**.



**Create Proposal**

**Grants.gov**  
Proposals for federal opportunities downloaded from and submittable to Grants.gov.

**Other Proposal**  
Other proposal formats not electronically submitted to Grants.gov, including other federal proposals, or opportunities from non-federal sponsors. Also includes internal opportunities.

**Research Subaward Proposal**  
Subaward proposal for internal use or for sending to other Proposals (S2S) sites; uses the 424 RR Budget.

**Training Subaward Proposal**  
Subaward proposal for internal use or for sending to other Proposals (S2S) sites; uses the PHS 398 Training Budget.

# 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:** Enter the **related Cayuse SP proposal number**, the **PI's name**, the **prime applicant** (the institution applying directly to the sponsor) and 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](mailto: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**.

**Create New Subaward**

Subaward Name:

Organization:

# of Budget periods:  1  2  3  4  5  6

Due Date:

Validation Type:

NIH  
CDC  
FDA  
SAMHSA  
AHRQ  
USU  
NIST  
NOAA  
HRSA  
HHS - Other  
NSF  
NSF Program Solicitation  
NIFA  
CDMRP  
NASA  
Other Federal Agency  
Other - Minimal

# Preparing a Subaward Proposal

The screenshot displays the Cayuse system interface for preparing a subaward proposal. The top navigation bar shows "Proposals List" and "Rutgers University subaward". The sidebar on the left contains a list of forms: "RR Performance Sites", "RR Key Persons", "RR Budget", and "Proposal Summary". The "RR Budget" form is selected. The main content area is titled "Proposal Export" and contains a text input field for the file name, a "Export" button, and a "Validate" button. The status bar at the bottom shows "Error (11) / Warning (0) / Info (0)", a dropdown menu for "NIH", and a "Final Review" button.

Proposals List > Rutgers University subaward

Proposals List

RR Performance Sites

1

RR Key Persons

1

RR Budget

1

2

3

4

Proposal Summary

Summary

Supporting Documents

Proposal Management

Permissions

Routing & Approval

Proposal History

Export

Rutgers University subaward

**Proposal Export**

Enter a name for the exported file: Rutgers University subaward .cayuse

Export

(This proposal must be approved and you must be authorized to export.)

Validate (Run final validation checks - *recommended*.)

Error (11) / Warning (0) / Info (0) NIH Final Review

- 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 can 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.**



# 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





# Activity 2: Your Professional Profile

## 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.

## If you do not have a Profile:

1. Email [ORCayuseHelp@ucdavis.edu](mailto: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)):

# Activity 2: Your Professional Profile

## Update your existing Profile / Complete your new Profile:

1. **Review all tabs** to ensure they have correct information.
2. Notes:
  - **eRA Role**
    - **Principal Investigator:** Anyone who would be added as Personnel in Cayuse 424
    - **Assistant:** Anyone assisting with proposal preparation or needing access to proposals in Cayuse 424
    - Other roles are for SPO only
  - **Dept/Division/Title:** Unit Code for the unit associated with contracts and grants
  - **Salary and Fringe Worksheet:** Employee ID, Appointment Information (Annualized Salary), Fringe Benefit Rate
  - **Performance Site:** Location where most of the PI's work takes place
3. Select the **Save** icon on the toolbar next to your name.

# Learning Objectives Recap

Hopefully, you now...

- Know the general proposal submission process
- 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\\_d718z15VTJ8Yk74](https://ucdavis.co1.qualtrics.com/jfe/form/SV_d718z15VTJ8Yk74)



Alyssa Bunn  
Contracts and Grants Officer  
Email: [aabunn@ucdavis.edu](mailto:aabunn@ucdavis.edu)

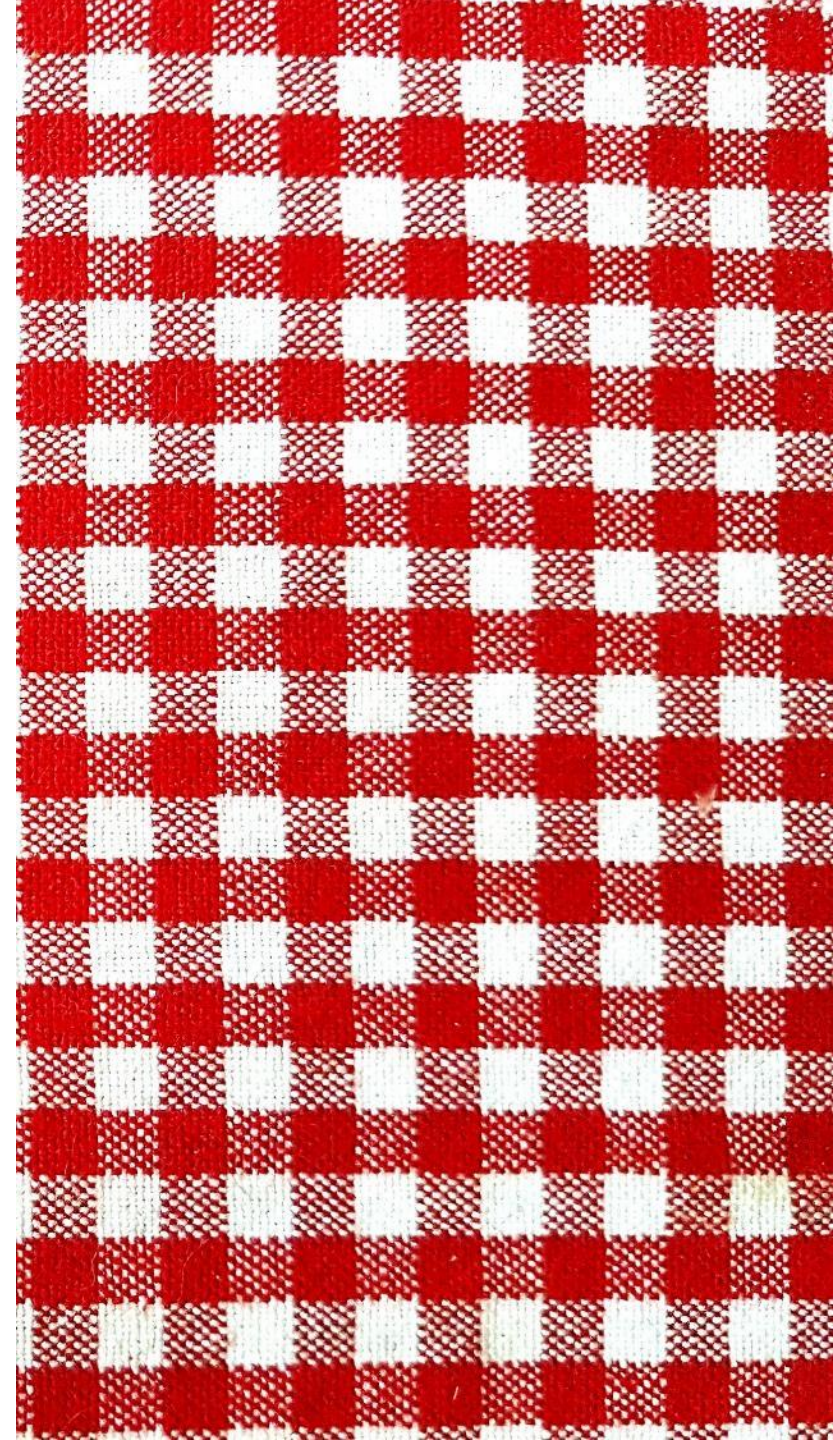
Perry King  
Training Officer  
Email: [pkings@ucdavis.edu](mailto:pkings@ucdavis.edu)



RESOURCES

# Resources

- [SPO's Cayuse 424 Training 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)





Addendum

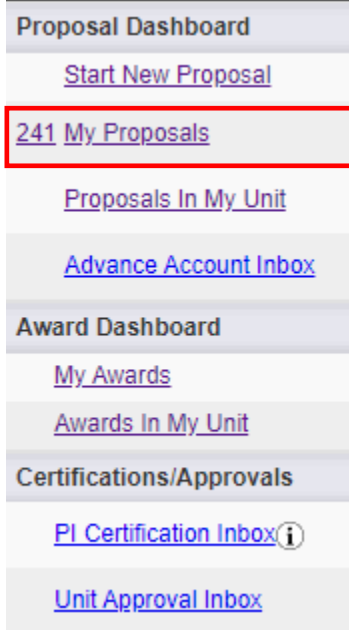
# How to Pull Content from Cayuse SP to Paste into 424

*Since so few people do this, we excluded it from the main body of this presentation.*

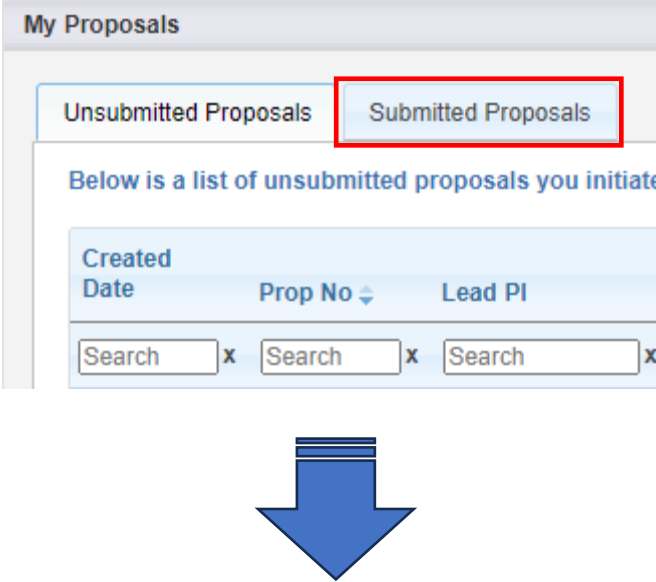
Method 1 (of 2):

- **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**

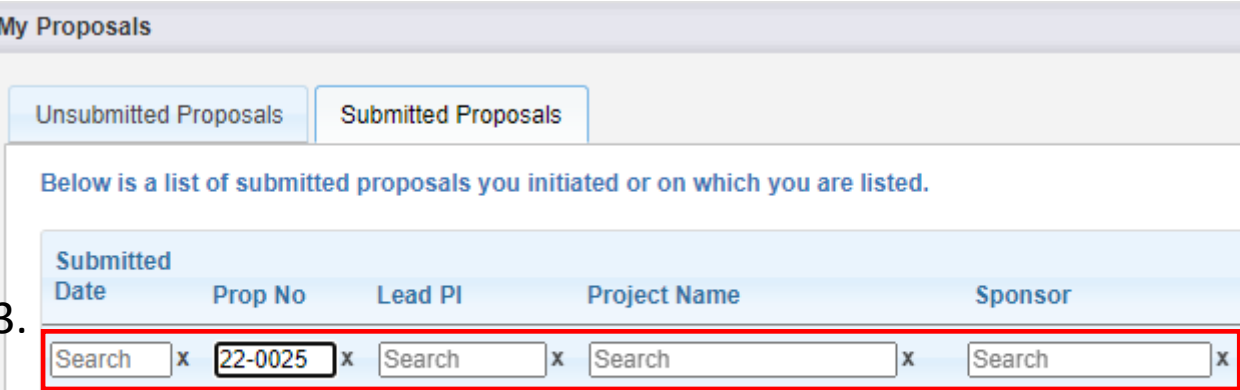
1.



2.



3.



4.



Submitted Date	Prop No	Lead PI	Project Name	Sponsor
03/18/2022	<a href="#">22-0025</a>	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

Method 1:

- 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**
  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.

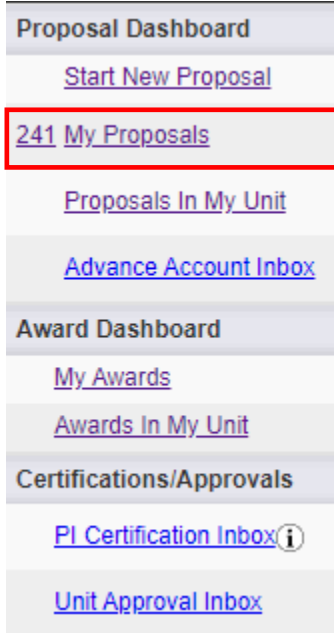
The image shows two side-by-side screenshots from the Cayuse system. The left screenshot, titled "Proposal Routing Status", displays details for proposal 22-0025, including project A23-0015, lead PI Gary Imaginary, and project title "Socio-ecological factors in Malaria transmission". A red box highlights the "View IPF" button. A red arrow points from a text note above to a PDF icon next to the proposal number. The right screenshot, titled "Item List 22-0025", shows a checklist of sections: 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, and Submission Notes. A blue arrow points from the "View IPF" button in the left screenshot to the "Investigators/Research Team" item in the right screenshot.

# 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** 



Proposal Dashboard

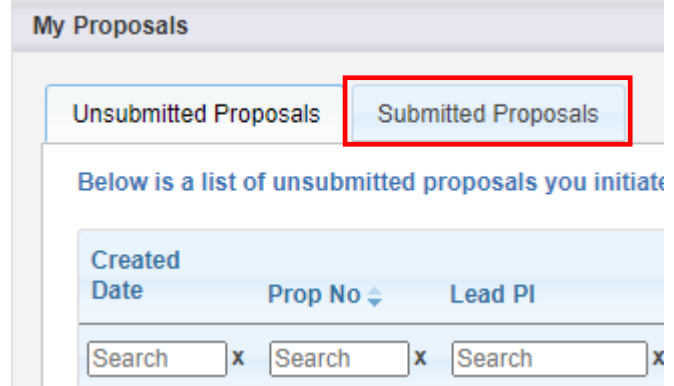
- [Start New Proposal](#)
- 241 My Proposals**
- [Proposals In My Unit](#)
- [Advance Account Inbox](#)

Award Dashboard

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

Certifications/Approvals

- [PI Certification Inbox](#)
- [Unit Approval Inbox](#)

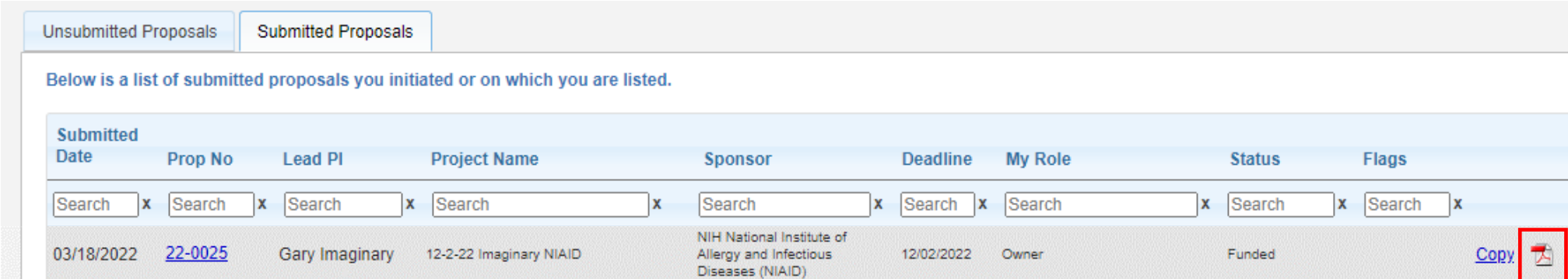


My Proposals

- Unsubmitted Proposals
- Submitted Proposals**


Below is a list of unsubmitted proposals you initiate

Created Date	Prop No	Lead PI
<input type="text" value="Search"/>	<input type="text" value="Search"/>	<input type="text" value="Search"/>



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	Deadline	My Role	Status	Flags
<input type="text" value="Search"/>	<input type="text" value="Search"/>	<input type="text" value="Search"/>	<input type="text" value="Search"/>	<input type="text" value="Search"/>	<input type="text" value="Search"/>	<input type="text" value="Search"/>	<input type="text" value="Search"/>	<input type="text" value="Search"/>
03/18/2022	<a href="#">22-0025</a>	Gary Imaginary	12-2-22 Imaginary NIAID	NIH National Institute of Allergy and Infectious Diseases (NIAID)	12/02/2022	Owner	Funded	Copy 

# 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** 

Sample first page of PDF

22-0025 Socio-ecological factors in Malaria transmission Pt: Imaginary, Gary Page: 1 of 5

**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

# 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

Opportunities

Proposals

Routing

People

Institutions

Reports

More

+ Create Proposal

Import

Proposals List

Search

[Show All](#)

Recently Viewed



[Expand All](#) / [Collapse All](#)

On the Cayuse 424 top toolbar, select **People**.

# How to Check a Professional Profile

Opportunities

Proposals

Routing

People

Institutions

Reports

More

+ Person

People

@ The Regents of the University of California (Davis) - UC Davis

[Show All](#)

Recently Viewed: 3 people



? [Admin, Amie](#)

? [Apple, Charlie](#)

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

Opportunities

Proposals

Routing

People

Institutions

Reports

More

+ Person

People

imaginary Search

@ The Regents of the University of California (Davis) - UC Davis

[Show Recently Viewed](#) | [Show All](#)

Search Results: 1 person



? [Imaginary, Gary](#)

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

Opportunities

Proposals

Routing

People

Institutions

Reports


More

+ Person

People

@

[Show Recently Viewed](#) | [Show All](#)

Search Results: 1 person 

If the name still doesn't appear, a Professional Profile will need to be created.

- **Never create a profile for someone at UC Davis who is not you.**

To add UC Davis personnel, **email request to [orcayusehelp@ucdavis.edu](mailto:orcayusehelp@ucdavis.edu)**. Include this information:

- First and last name
- Kerberos username (if known; this can differ from the first part of the email address)
- UCD email address
- Department
- PI status: will they be submitting as PI at some point, Yes or No?



# How to Check a Professional Profile

Opportunities

Proposals

Routing

People

Institutions

Reports


More

+ Person

People

@

[Show Recently Viewed](#) | [Show All](#)

Search Results: 1 person 

**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.
  - This individual will also not appear or be able to be added in **Cayuse SP** until an overnight update takes place.

# How to Check a Professional Profile

## 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:

NASA NSPIRES ID:

NSF ID:

We are now in Professor Gary Imaginary's Professional Profile.

Let's start with **Permissions** in the top right.

- Anyone who accesses their own Professional Profile can use **Permissions** to assign another person access to update their profile.
  - When viewing someone else's profile, you won't be able to update their **Permissions**.

# Profile Permissions

The screenshot shows a web application interface for managing permissions. In the background, a page titled 'Permissions for Professional Profile' is visible, with a red 'X' icon and the text 'Imaginary, G'. A green '+ Add user' button is highlighted with an orange box. A modal dialog box titled 'Add Security Principal' is open in the foreground. The dialog has a search input field containing 'obelleiro' and a 'Search' button, both highlighted with orange boxes. Below the search field is a 'Show All' link. The dialog contains the text 'Select Users below to provide access to this Professional Profile.' and a section titled 'Recently Used: 2 principals' with a table:

Type	User	Profile Name
U	capple	Apple, Charlie
U	Gary Imaginary	Imaginary, Gary

At the bottom of the dialog, there are 'Add User' and 'Remove User' buttons, both with blue checkmarks. The background page also has 'Add User' and 'Remove User' buttons with blue checkmarks.

- Click **Add user**
- In pop-up, type **last name** of individual to receive permissions
- Click **Search**

# Profile Permissions


The screenshot shows a web application interface for managing profile permissions. The main page displays 'Permissions for Professional Profile' with an 'Add user' button. A pop-up window titled 'Add Security Principal' is open, showing a search for 'obelleiro' and a search result for 'kassie@ucdavis...' with profile name 'Obelleiro, Kassie M'.

Type	User	Profile Name
U	kassie@ucdavis...	Obelleiro, Kassie M



- Click **Add user**
- In pop-up, type **last name** of individual to receive permissions
- Click **Search**
- In **Search Results**, click on **name**

# How to Check a Professional Profile

People » [Imaginary, Gary](#) » **Permissions** ◀ Profile


 **Permissions for Professional Profile: Imaginary, Gary**


+ Add user


	List	Read	Write	Delete	Autofill	Change Permissions	Add User	Remove User
 Imaginary, Gary (Gary Imaginary)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
 Obelleiro, Kassie M (kassie@ucdavis.edu)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- 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

# Professional Profile: Name

People » [Imaginary, Gary](#) 

 [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:

NASA NSPIRES ID:

NSF ID:

## Name tab:

- Select **Rename** to edit name.
- If you add the NIH Commons ID or NSF ID here, it will auto-populate into Cayuse 424 proposals.
  - Ignore the NASA entry.
    - NASA proposals must use NSPIRES, not Cayuse 424.

**Important:** Whenever you edit any Professional Profile page, click the save icon  in the top right to save it.

# Professional Profile: Degrees

## 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

### Degrees

NIH Degrees  
(comma separated, max of 3):

Senior/Key Person Degree Type:

Senior/Key Person Degree Year:

NSF Degree Type:

NSF Degree Year:

## Degrees tab:

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

# Professional Profile: Demographics

## 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:

#### 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:

Citizenship:

#### Disability Status (Check all that apply):

- Hearing
- Visual
- Mobility/Orthopedic Impairment
- Other
- None
- Do Not Wish to Provide

## Demographics tab:

- **Ignore this tab.** UC Davis does not collect nor distribute demographics information.



# Professional Profile: Biosketches & Inst. Assoc.

## 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."

## Biosketches tab:

- **SPO recommends you ignore this tab.**
  - Biosketches should be updated for each proposal application.
  - Biosketches added here may become out of date.


## Institutional Association:


UC Davis (Cinema & Digital Media)

- 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*)

# Professional Profile: Contact Info


People » **Imaginary, Gary**

 **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)

## Contact Info

**Street 1:**

**Street 2:**

**City:**

**State/Province:**  ▼

**Zip/Postal Code:**

**County:**

**Country:**  ▼

**Phone:**

**Fax:**

**Email:**

## Contact Info tab:

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

# Professional Profile: 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

## eRA Role tab:

- **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.

# Professional Profile: Dept / Division / Title

People » Imaginary, Gary

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)

### Department / Division / Title

[Select Division and Department] ▼

Code Title

Department: 040331 Cinema & Digital Media

Division: 17 LS: Arts & Humanities

Position/title: Pretend Professor

NASA

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?

▼

- If needed, search for and select an updated **Division and Department**
- You can also add the individual's **Position/title**
- **Ignore the NASA section.** NASA uses NSPIRES, not Cayuse 424

# Professional Profile: Salary and Fringe Worksheet

## 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	98300
Summer:	2.0	21844

### Fringe Worksheet

Import Institutional Rates

Category	Entry (\$)	Factor (%)
Faculty Acad MSP ST		39.6

+ New Row

Base Fringe Rate: %

Fringe Rate Total: 39.60%

## Salary and Fringe Worksheet tab

- If the individual's **Employee ID** is entered, **salary**, **appointment** and **fringe benefits** will be automatically updated during each nightly system update.
  - Alternatively, you can manually enter details here.

# Professional Profile: 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 !\[\]\(661ad2fdbe8fa1392f2b194cfa45d124\_img.jpg\)](#)

 [Routing Profile](#)

UC Davis (Cinema & Digital Media)

### Performance Site Active

[Fill from Contact/Org Info](#)

Organization Name:

Street 1:

Street 2:

City:

State/Province:

Zip/Postal Code:

County:

Country:

Organization UEI:

Organization DUNS:

Congressional District:

## Performance Site tab

- 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](#)

# Professional Profile: Routing Profile

People » **Imaginary, Gary**

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**

Manage Routing Profile - Google Chrome

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

**Manage Routing Profile** ? Close

**Imaginary, Gary - UC Davis: Cinema & Digital Media**

**Next Reviewer** ✎

- Bell, Patrick B (OVCR - Sponsored Programs) ✖

**1 Delegate** +

- Duperron, Terrence P - OVCR - Sponsored Programs ✖

Permissions

- **Do not use the Routing Profile.**
  - This populates the **Routing Chain**, which as you'll recall, **SPO does not use.**