Cayuse Professional Profiles

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Professional Profiles Overview

Professional Profiles allow individuals to access both Cayuse SP and Cayuse 424 and to route and/or approve Cayuse SP proposals (formally known as **Internal Processing Forms (IPFs)**).

Principal Investigators (PIs), contract and grant administrators and others that play a role in the proposal process must all have a Cayuse Professional Profile.

Tips

- PIs and other key personnel can avoid routing errors in Cayuse SP by ensuring that the unit in their Professional Profile is the unit that will approve their IPF.
 - The unit can also be manually updated in the IPF on a proposal-by-proposal basis.
- Keeping salary and appointment information current can streamline and speed budget calculations.

Find a Professional Profile

1. Login to the Cayuse Research Suite

(https://ucdavis.cayuse424.com) using your Kerberos.

- If you do not yet have a Kerberos User Name, work with your department to create one then provide the following to <u>ORCayuseHelp@ucdavis.edu</u> in order to be added to the system:
 - o Full name
 - Kerberos ID (can differ from email address)
 - o Email address
 - Home Unit
 - Will you/they be added to proposals as an investigator?
 - Employee ID (if available)
- 2. Select Cayuse 424.
- 3. On the top toolbar, select People.



cayuse 424							🛓 Charlie	e Apple 🔻
Opportunities	Proposals	Routing	People	Institutions	Reports	More	+ Create Proposal	🖺 Import
Proposals List								A

- 4. Type the last name in the Search field then select Search.
 - To limit the search to just UC Davis, change the @ field by selecting "The Regents at the University of California (Davis) UC Davis" from the drop-down list. Then select Search.

People	
apple Search	
@ The Regents of the University of California (Davis) - UC Davis	•
Show Recently Viewed Show All	

- 5. Click on the individual's name in the **search results**.
 - If the individual you seek does not appear in the search results, they either do not have a Professional Profile, their profile is saved under a different name, or wrong spelling was used.
 - Either continue searching under other known names or request/have them request a new Professional Profile by emailing <u>ORCayuseHelp@ucdavis.edu</u> with the info in step 1 above.

Update a Professional Profile

You can update your own Professional Profile or the Profile of somehow who has granted you **Permissions** to do so (jump down to <u>Grant Permissions to Your Professional Profile</u>).

Update each section as needed.

- A wrong department listed under **Dept / Division / Title** (and shown under **Institutional Association**) can cause unnecessary and time-delaying errors in the routing of an IPF in Cayuse SP.
- Updated information is especially helpful for individuals added as investigators in Cayuse 424 as details in the Professional Profile are auto-populated into proposals.

When you make edits, a **save icon save icon** will appear next to your/the individual's name. It's good form to **click the save icon as you go**.

• Though edits will save automatically if you exit the Professional Profile by clicking "**People**" next to the individual's name or by navigating to another screen in Cayuse 424 (by clicking in the top toolbar), edits will not be saved if the browser window is closed or if you click **Permissions**.



When done with a Professional Profile, exit by clicking "People" next to the individual's name.

We will now proceed step-by-step through each section of a Professional Profile.

Name

(screenshot above)

Click **Rename** if the name needs to be updated. Note: This type of edit takes a half minute or so to complete.

- While you can enter an NIH Commons ID, ignore the NASA NSPIRES ID and NSF ID.
 - NASA and NSF both use stand-alone proposal submissions systems and do not accept proposals through Grants.gov, to which Cayuse 424 is linked.

Degrees

• Enter degree information but ignore the NSF fields since NSF uses Research.gov, not Cayuse 424.

People » Imaginary, Gary	
Professional Profile: Imaginary, Gary	¥
General Personal Information	Degrees 🔋
Degrees Demographics	NIH Degrees PhD, MBA, MS (comma separated, max of 3):
Biosketches 1 Institutional Association	Senior/Key Person Degree Type: PhD, How to Live Forever Senior/Key Person Degree Year: 1900
UC Davis (Cinema & Digital Media) Contact Info	NSF Degree Type: Please Select v
eRA Role Dept / Division / Title Salary and Fringe Worksheet	
Performance Site	

Demographics and Biosketches

Do not complete the Demographics and Biosketches sections.

- UC Davis does not collect nor distribute **demographics** information.
- While **biosketches** added here will auto-populate into Cayuse 424 proposals, biosketches should be updated for each proposal and any biosketches added here may quickly become out-of-date.

Institutional Association

Here you can see the individual's department. If it needs updating **do not select the X next to UC Davis**. This will remove the individual's affiliation with UC Davis.

• Instead, update the department under **Dept / Division / Title**, which is covered below.

People » Imaginary, Gary										
Professional Profile: Imaginary, G	Gary 🎉									
General Personal Information Name Degrees Demographics Biosketches 1 Institutional Association UC Davis (Cinema & Digital Media)	UC Davis (Cinema & Digital Media) Contact Info Street 1: One Shields Avenue Street 2: City: Davis State/Province: California]								
Contact Info	County: Y _{0l0}									
eRA Role Dept / Division / Title	Country: United States									
Salary and Fringe Worksheet Performance Site	Phone:									
Routing Profile	Email: gimaginary@ucdavis.edu									

Contact Info

Enter the individual's **workplace contact info** (i.e., their office), not where the project work is to be performed, which goes under **Performance Site** below.

• Cayuse 424 proposals require zip/postal codes to have a 4-digit suffix. To reduce auto-population errors, identify and enter the 4-digit suffix on this screen by using the <u>USPS Zip Code Lookup</u>.

eRA Role

This section is important.

Select **Principal Investigator** if the individual is to be added as an investigator to a Cayuse IPF/proposal.

• If **Principal Investigator** is not selected, the individual's 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 (SPO) staff.



Dept / Division Title

To update the individual's department, click in the **[Select Division and Department]** field and select an updated department from the drop-down list.

- Departments are listed by school/college or university division.
 - Unfortunately, you cannot use CTRL+F to search for specific text in the list.
 - If you do not find your department listed, contact <u>ORCayuseHelp@ucdavis.edu</u> for assistance.
- You can also indicate the individual's title under **Position/title**.
- Ignore the NASA section

People » Imaginary, Gary	
Professional Profile: Imaginary, Gary General Personal Information Name Degrees Demographics Biosketches 1 Institutional Association UC Davis (Cinema & Digital Media) Contact Info	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
eRA Role Dept / Division / Title Salary and Fringe Worksheet Performance Site	NASA Is this appointment an employee of the U.S. Government?

Salary and Fringe Worksheet

An individual's base salary can be entered in the appropriate box.

• For faculty with 9- or 11-month appointments do not annualize salary over 12 months.

Entries made in the **Fringe Worksheet** section can quickly grow out-of-date.

• Always double-check details that auto-populate into Cayuse SP or Cayuse 424.

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Degrees	Sulary / Appointment type
Demographics	Employee ID: 55555555
Demographics	
Biosketches	Appt Type:
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💥 UC Davis (Cinema & Digital Media)	Academic: 9.0 130000
Contact Info	
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Dept / Division / Title	Fringe Worksheet
Salary and Fringe Worksheet	Town and Town in the strength Decker
Performance Site	/ Import Institutional Rates
Bouting Profile	Category Entry (\$) Factor (%)
	Faculty Acad MSD ST 😾 30.6

Performance Site

Enter the primary location where project work is/will be performed and check the **Active** box.

- If same as **Contact Info**, save time by clicking the **Fill from Contact/Org Info** button.
- Cayuse 424 proposals require zip/postal codes to have a 4-digit suffix. To reduce auto-population errors, identify and enter the 4-digit suffix on this screen by using the USPS Zip Code Lookup.
- For details to complete the last three fields, consult the UC Davis Institutional Information page.

sopie * Imaginary, Gary Professional Profile: Imaginary, Gary Ceneral Personal Information Name Degrees Demographics Biosketches 1 Institutional Association Contact Info eRA Role Dept / Division / Title Salary and Fringe Worksheet Performance Site Contact Info eRA Role Dept / Division / Title Salary and Fringe Worksheet Performance Site Country: Yolo Country: Yolo Country: United States Organization UEI: Organization DUHs: 047120084 Congressional District: CA:004			
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1 Institutional Association ↓ ↓ UC Davis (Cinema & Digital Media) Contact Info eRA Role Dept / Division / Title Salary and Fringe Worksheet Performance Site ▶	Biosketches	Street 1: One Shields Avenue	
UC Davis (Cinema & Digital Media) Contact Info eRA Role Dept / Division / Title Salary and Fringe Worksheet Performance Site > VRouting Profile Organization DUNS: 047120084 Contact Info	1 Institutional Association 🛛 🖕	Street 2:	
Contact Info eRA Role Dept / Division / Title Salary and Fringe Worksheet Performance Site > VRouting Profile Organization DUNS: 047120084 Context Info	UC Davis (Cinema & Digital Media)	City: Davis	
Contact Info Zip/Postal Code: 95616 eRA Role County: Yolo Dept / Division / Title County: Yolo Salary and Fringe Worksheet County: United States ✓ Performance Site ► Organization DURS: 047120084 Congressional District: CA-004	······································	State/Province: California	×
eRA Role Salary and Fringe Worksheet Country: Yolo Performance Site Organization UEI: Organization DUNS: 047120084 Congressional District: CA-004	Contact Info	Zin/Postal Code: 05040	
Dept / Division / Title County: Yolo Salary and Fringe Worksheet Country: United States Performance Site Organization DUEI: Organization DUNS: 047120084 Congressional District: CA-004	eRA Role	219/ Postal code. 93010	
Salary and Fringe Worksheet Country: United States Performance Site Organization UEI: Organization DUNS: 047120084 Congressional District: CA-004 	Dept / Division / Title	County: Yolo	
Performance Site Organization UEI: Organization DUNS: 047120084 Congressional District: CA-004	Salary and Fringe Worksheet	Country: United States	
Organization UEI: Organization DUNS: 047120084 Congressional District: CA-004	Performance Site		
Organization DUNS: 047120084 Congressional District: CA-004		Organization UEI:	
Congressional District: CA-004	Routing Profile		
Congressional District: CA-004		Organization DUNS: 047120084	
		Congressional District: CA-004	

Routing Profile

Do not use the Routing Profile. It populates the Cayuse 424 **Routing Chain**, which the Sponsored Programs Office (SPO) does not use.

Grant Permissions to Your Professional Profile

Use **Permissions** in the top right to assign another person access to edit your Professional Profile.

• You cannot update **Permissions** when viewing someone else's Profile.

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Professional Profile: Imaginary, Gar	у 渊					
Conoral Personal Information	_		٦			
Name Degrees	Name	Rename				
Demographics Biosketches	Prefix:					
1 Institutional Association 🛛 🖕	First:	Gary				
UC Davis (Cinema & Digital Media)	Middle:					
Contact Info eRA Role	Last:	Imaginary				
Dept / Division / Title Salary and Fringe Worksheet	Suffix:					
Performance Site	NIH Commons ID:	gimaginary				
	NASA NSPIRES ID:	spacegary				
	NSF ID:					

To add permissions:

1. Click Add user

People » Imaginary, Gary	» Permissions								
Rermissions for Professional Profile: Imaginary, Gary									
Add user]								
		List	Read	Write	Delete	Autofill	Change Permissions	Add User	Remove User
*	Imaginary, Gary (Gary Imaginary)								

- 2. In the pop-up that appears, the name of the person you seek may show under **Recently Used** if you recently viewed their profile.
 - Otherwise, type the **last name** of the individual to be granted permissions then click **Search**.

저 Add S	ecurity Principal - Google Chrom	e			×					
🗎 ucd	avis-uat.cayuse424.com/106	7/showPrincipalsList.c	lo?subse	essionl	Ð					
Add Security Principal close										
obelleiro Search Show All Show All										
Select (Select Users below to provide access to this Professional Profile.									
Recent	Recently Used: 2 principals									
Туре	User	Profile Name								
U	capple	Apple, Charlie								
U	Gary Imaginary	Imaginary, Gary								

- 3. Click on the individuals' name in the **search results**.
 - If their name is not listed, they either do not have a profile or their profile is saved under a different name.
 - Either continue searching under other known names or ask them for more information.
- 4. Add checkboxes as desired to provide edit access to the individual.
 - Remove checkboxes to remove permissions.
 - Click the **red X** to remove an individual's access.
- 5. When done/ready to return to your Profile, click **Profile** in the top right.

People » Imagina	i <u>ry, Gary</u>	» Permissions								44 Profile
	Kermissions for Professional Profile: Imaginary, Gary									
	Add user]								
			List	Read	Write	Delete	Autofill	Change Permissions	Add User	Remove User
	*	Imaginary, Gary (Gary Imaginary)								
	*	Obelleiro, Kassie M (kassie@ucdavis.edu)	V							

Create a Professional Profile

Do not create a Professional Profile for someone else at UC Davis.

- To request a profile for a UC Davis user, email <u>ORCayuseHelp@ucdavis.edu</u> with their:
 - Full name
 - Kerberos ID (can differ from email address)
 - Email address
 - Home Unit
 - Will you/they be added to proposals as an investigator?
 - Employee ID (if available)

Only create profiles for individuals you need to add to a proposal who <u>are not</u> employed by UC Davis, such as the PI at a subrecipient institution.

- 1. Before creating a new Professional Profile, search for the individual under **People** to ensure a Professional Profile does not already exist.
- 2. From **People** (in the top toolbar), select + **Person** in the top right.



- 3. Complete the pop-up window then click the **Create New Profile** button.
 - Middle Name is optional.

Create Professional Profile		
First name:	Cuthbert	(required)
Middle name:		
Last name:	Calculus	(required)
	Cancel Create New Profile	

4. Click the green + symbol to add the individual's Institutional Association.

pple » Calculus, Cuthbert		
Professional Profile: Calculus, Cuthbert	*	
General Personal Information		
Name December 201	Name	Rename
Demographics		
Biosketches	Prefix:	
0 Institutional Associations 🛛 🖶	First: Cuthb	ert

- 5. In the pop-up that appears, click **Select...** then choose the institution from the drop-down list.
 - For another UC, search under "The" ("The Regents of the...")
 - Once the institution is selected, click **Create Institutional Association**.

Creat	te Institutional Association
Institution:	Select ×
	Create Institutional Association Cancel

- If the institution is not found in the list, email <u>ORCayuseHelp@ucdavis.edu</u> to request the institution be added.
 - In the email, include as much information about the institution as you have, especially the UEI (Unique Entity Identifier) or EIN (Employer Identification Number).

General Personal Information		
Name 🕨	Name	Ren
Degrees	Name	IXen
Demographics		
Biosketches	Prefix:	
1 Institutional Association 🛛 🖶	First: Cut	hbert
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eRA Role	Last: Calo	ulus
Dept / Division / Title	Suffix:	
Salary and Fringe Worksheet		
Performance Site	NIH Commons ID:	
Routing Profile		

- 6. Update the sections of the Professional Profile as shown in the <u>Update a Professional Profile</u> section above.
 - Especially important is to indicate their **eRA Role** as **Principal Investigator** (by added a check to the box) so they can be found in a search and added to a proposal.