

cayuse SP 

# Cayuse SP Training

1. Entering and Submitting Cayuse SP Proposals
2. Open Discussion/Questions



# Cayuse SP

## Entering and Submitting Proposals

Updated: July 25, 2018

# Training Outline

- Overview of Cayuse SP
- Returning of a Proposal for Correction
- Cayuse SP Hands-on Lab
  - Entering and submitting a proposal to Sponsored Programs
  - Certifying a proposal
- Q&A
- Resources



## Evisions Research Suite

3.6

### Research Administration Modules

- Cayuse SP (Sponsored Projects)
- Cayuse 424

### System Administration Applications

- Backbone
- Research Contacts
- Workflow

### Application Help

- Research Suite Support Center
- Browser Support & Configuration

**Proposal Dashboard**

[Start New Proposal](#)

[My Proposals](#)

[Proposals In My Unit](#)

[Advance Account Inbox](#)

**Award Dashboard**

[My Awards](#)

[Awards In My Unit](#)

**Certifications/Approvals**

[PI Certification Inbox](#)

[Unit Approval Inbox](#)

UC Davis Sponsored Programs  
Office  
1850 Research Park Drive  
Suite 300  
Davis, CA 95618  
Phone:

Email: [proposals@ucdavis.edu](mailto:proposals@ucdavis.edu)

**>> Welcome to Sponsored Projects**

**Use the Proposal Dashboard to:**

- Create a new proposal
- Edit and track proposal records you have created or on which you are named as a contributing member.
- View proposal records in administering units to which you have been granted Proposal Data Access.
- Authorize preliminary award requests in your role as a Pre-Award Spending Approver.

**Use the Award Dashboard to:**

- View awards on which you are listed as a member of the Research Team.
- View awards in administering units to which you have been granted Award Data Access.

**Use the Certifications/Approvals Dashboard to:**

- Certify proposal records on which you are cited as the Lead PI or PI.
- Authorize proposal records in your role as a unit IPF Approver.

**Administrative Support**

Contact the Office of Sponsored Research for policies and procedures regarding the management and administration of research and sponsored activities. We serve as your primary contact for information about funding opportunities, research proposal development, budget development, award administration and more.

**Technical Support**

For technical issues in Cayuse SP, contact Evisions Technical Support at one of the following:

- Email: [ResearchSuiteSupport@Evisions.com](mailto:ResearchSuiteSupport@Evisions.com)
- Phone: 503.297.2108 ext.201

Also refer to the [Evisions Research Suite Support website](#) for frequently asked questions, product documentation and other technical information.

# Overview of Cayuse SP

# What is Cayuse SP?

- New method for submitting to SPO and accessing materials
  - Proposals
  - Awards
  - Subawards/subcontracts
  - Advance Accounts
- Online Routing
  - Principal Investigator
  - IPF Approver(s)
  - SPO

The logo for Cayuse SP, featuring the text "cayuse SP" in a lowercase, sans-serif font. The word "cayuse" is in black, and "SP" is in a larger, bold black font. To the right of "SP" is a small orange square.

# What Does This Mean?

- Can view the status of proposals, awards and subawards in real time
- Can edit/certify/submit proposals while out of the office
- No more Data Sheets and “wet” signatures
- Submit a complete proposal package to SPO at least five (5) days before sponsor deadline to ensure a full SPO review
- Proposal (IPF) packages include:
  - Complete copy of the proposal (at a minimum):
    - Project budget and budget justification, if required by the sponsor
    - Scope of Work (may submit a draft and provide the final before submission to sponsor)

# Returning a Proposal for Correction

- The following items will result in the proposal being rejected and re-routed for approval
  - Budget Cost Share, Incorrectly Applied (match/in-kind)
  - Effort Changed from Direct Charge to Cost-Share
  - Key-personnel added to the project after routing to SPO
  - Subawards added to the budget after routing to SPO
  - Incomplete IPF/Proposal
    - Incorrect IPF Approvals/Authorizations
    - Complete all IPF Proposal tabs and fields, even when no red \*
- The proposal will return to Unsubmitted status
  - The Department Admin and PI can make the needed revisions
- The IPF Approvers will need to Authorize the Proposal
- Then it will re-route to SPO for review

cayuse SP 

# Cayuse SP Lab

- Starting/Submitting a Proposal
- Certifying a Proposal (PI)



# Log-in to Cayuse SP

- Use Mozilla FireFox
- Testing Site: <https://ucdavis-uat.cayuse424.com/>
  - Select SP
  - Username: amieadmin
  - Password: catcat

# Getting Started

- Review the [\*Handbook for Department Contract & Grant Staff, Principal Investigators and Approvers\*](#)
- Ensure your Unit is set-up
  - View Research Contacts from <https://ucdavis.cayuse424.com>
- Have the complete proposal package ready and submitted to SPO at least 5 days before the sponsor deadline
  - Proposal (IPF) packages include (at a minimum):
    - Cover page
    - Project budget and budget justification
    - Scope of Work (may submit a draft and provide the final before submission to sponsor)
- Complete **all** applicable fields

# Start a New Proposal

- Select Start a New Proposal from the Dashboard
- Complete the General Information page
  - Sponsor: Select “Miscellaneous Sponsors” if the sponsor is not listed
    - **Do NOT** select No Sponsors
  - Admin Unit: **Do not** select a Unit listed as “Non Admin/Home”
  - Short Project Name: Internal Identifier
    - Format: [Sponsor Deadline in MM/DD/YY format] [PI Last Name] [Sponsor Acronym]
  - Submission Deadline: Date due to the sponsor
    - Format: Military Time (Pacific)
  - If using 424, select that as the Submission Method
  - Do NOT pair with 424

# Start a New Proposal

- Complete each page/tab
- A green checkmark will appear when tab is complete
- The only not required tab is Submission Notes

The screenshot shows a mobile application interface for proposal management. At the top, it says 'Item List' and '17-0190'. Below that, there is a instruction: 'View or Edit completed sections by clicking the name next to the check.' The main content is a list of tabs, each with a green checkmark indicating completion. The tabs are: 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. At the bottom, there is a 'Submit for Routing' button.

Item	Status
General Information	Completed
Investigators/Research Team	Completed
Budget	Completed
Financial Conflicts of Interest in Research	Completed
Regulatory Compliance	Completed
Subrecipients	Completed
Foreign Activity	Completed
Special Interest	Completed
Additional Questions	Completed
Location of Sponsored Activities	Completed
Proposal Abstract	Completed
Proposal Attachments	Completed
Approving Units	Completed
Submission Notes	Not Completed

Submit for Routing

# Start a New Proposal

- Investigators/Research Team

- Drives the Approving Units list

- Add all Key Personnel

- Ensure their Unit is correct.
- **Do not** list a “Non Admin/Home” unit.
- Use the “Other Participant – No Routing” role for users that edit access but that are not Key Personnel.

- Sponsored Effort

- Effort being charged to this proposal

- Allocation of Credit

- Must equal 100%
- Lead Principal Investigator determines the allocation

- Budget

- Select the Summary form
- Uncheck “Use Calculated Values” if calculations are incorrect due to rounding

# Start a New Proposal

- Financial Conflicts of Interest in Research
  - Complete the applicable COI Disclosures now or at a later time.
  - Select Yes to indicate that you have filed or will file the applicable COI Disclosures.
- Regulatory Compliance
  - Human Subjects
  - Animal Subjects
  - Hazardous Material
- Subrecipients
  - Enter all (outgoing) Subawardees
  - Select “Miscellaneous Sponsors” if not listed
- Foreign Activity
  - When in doubt, select “yes”

# Start a New Proposal

- Special Interest
- Additional Questions
- Location of Sponsored Activities
  - Must total 100% across all quadrants
  - Do not enter location of Subawardee(s)
- Proposal Abstract
- Proposal Attachments
  - If using another eRA system: Upload internal documents
  - If not using another eRA system: Upload all proposal documents

# Start a New Proposal

- Approving Units

- Review for Accuracy

- The only “Non Admin/Home” units that are OK will indicate as a “roll up”

- Reorder as needed

- Keep as many at level 2 as possible

- If Admin Unit in SVM

- School of Veterinary Medicine (Unit Code: 50) should be listed last

- If Admin Unit is not in SVM but Investigators in SVM

- School of Veterinary Medicine (Unit Code: 50) should be listed after all participating SVM units

- If Admin Unit in SOM

- School of Medicine (Unit Code: 43) should be listed last

- If Admin Unit is not in SOM but Investigators in SOM

- School of Medicine (Unit Code: 43) should be listed after all participating SOM units



# Start a New Proposal

- Submission Notes
  - Sponsor contact information if selected “Miscellaneous Sponsors”
  - Subawardee contact information if selected “Miscellaneous Sponsors”
  - Indication of where proposal materials are located, if in another eRA system such as Cayuse 424
  - Any other notes
- Submit for Routing
  - If someone other than the PI creates/edits the proposal, it is advised the PI perform this step then Certify the proposal
- Will Route for Certification and Approval
  - Principal Investigator
  - IPF Approver(s): Department and/or Dean, if applicable
  - SPO

# Cayuse SP Statuses

Item	Status	Definition
Proposal	Unsubmitted	Not submitted for routing
	Dept Approval in Process	Pending IPF approvals
	Admin Office in Process	Received by SPO but not assigned
	PS Review	Under review by Proposals Analyst
	CS Review	Under review by Awards Analyst
	Proposal Approved	Proposal approved for submission to sponsor
	Proposal Reopened	Proposal reopened for department to edit

# Cayuse SP Statuses

Item	Status	Definition
Proposal	Submitted to Sponsor	Proposal has been submitted to the sponsor
	Withdrawn	Proposal withdrawn by PI
	Not Funded	Proposal not funded by the sponsor
	JIT Request Received	SPO or PI received a JIT request from the sponsor
	JIT Request Approved	SPO has approved the JIT information provided by the PI/department
	JIT Request Unsubmitted	The PI decided not to submit JIT information
	Funded	Notice of Award received by the sponsor (This does not mean the award has been executed)

# Cayuse SP Statuses

Item	Status	Definition
Awards	Active	The award has been fully executed and routed to Contracts and Grants Accounting
	Pending	The award is not fully executed
Item	Status	Definition
Subawards	(Awaiting) Admin Dept	Action is required by the PI/department
	(Awaiting) Award Mgr/Analyst	Action is required by the Award Analyst
	(Awaiting) Subcontractor	Action is required by the Subcontractor/Subawardee
	Fully Executed	The Subaward/Subcontract is fully executed and has been sent to CGA

# Certify a Proposal

- View in PI Certification Inbox
- View the IPF or PDF
- Certify (this is the new way to “sign”)
- The Proposal will continue to route without PI certification

# Resources and Help

- UC Davis Cayuse Landing Page: <http://spark.ucdavis.edu/cayuse/>
- Help Guides and Videos: <http://spark.ucdavis.edu/training/>
- Cayuse Listserv:  
[https://lists.ucdavis.edu/sympa/subscribe/spark\\_info](https://lists.ucdavis.edu/sympa/subscribe/spark_info)
- Help Request: [ORCayuseHelp@ucdavis.edu](mailto:ORCayuseHelp@ucdavis.edu)
- eRA Help: [SPOeRAHelp@ucdavis.edu](mailto:SPOeRAHelp@ucdavis.edu)
- Cayuse Training Sessions: <http://spark.ucdavis.edu/training/>



**Thank you!**