



Cayuse SP – Role Delegation Authorization Form

Instructions: Complete, sign and email to ORCayuseHelp@ucdavis.edu or deliver/mail form to Sponsored Programs Office, 1 Shields Avenue, Mrak Hall 4th Floor, Davis, CA 95616-5270.

As Department Chair/Unit Director of _____, I understand that Cayuse SP (the system for submitting proposals to Sponsored Programs) includes the following roles:

Roles	Description
Role Manager	A role granted within Cayuse SP by SPO to specific individuals designated by the Dean or Department Head, to add and remove roles for department/unit personnel within Research Contacts.
Internal Processing Form (IPF) Approver	A role granted within Cayuse SP by the Role Manager for a specific person. This role has signing authority to review and approve proposals on behalf of the department.
Pre-Award Spending Approver/Endorser	A role granted within Cayuse SP by the Role Manager to specific individuals within their Department/school/college. This role has signing authority to review and endorse Pre-Award Spending Requests (i.e., "Advance Account Requests"). Pre-Award Spending Requests for a proposal can be prepared and submitted electronically in Cayuse SP to SPO for review/approval. Only one Departmental/School/College authorized representative needs to endorse the request in order to fulfill the departmental concurrence requirement, and submit it through Cayuse SP for review/approval at SPO.
Award Data Access	A role granted within Cayuse SP by the Role Manager to specific individuals. These individuals can view departmental award data contained in Cayuse SP through the "Awards in My Unit" dashboard.
Proposal Data Access	A role granted within Cayuse by the Role Manager to specific individuals. These individuals can view proposals in a given Admin Award Department, as well as access those proposals where that department is named, through the "Proposals in My Unit" dashboard. These individuals can perform the following tasks: view the proposal, its IPF, and associated attachments; copy the proposal; and prepare a Pre-Award Spending Request for the proposal.

Per UC Davis PPM 330-31, Section IV(B), I understand that, as the Department Chair/ORU Director, I am responsible for approving research proposals and budget expenditures for my department/unit. I also understand that, per UC Davis PPM 330-10, Section III(B), as the Department head, I may designate the IPF Approver and Pre-Award Spending Approver/Endorser roles to employees meeting **all** of the following qualifications:

1. Active involvement with the activity being conducted; and
2. A working knowledge of the University budget process; and
3. The technical skills required to use the administrative systems involved in conducting the activity; and
4. Familiarity with the policies, rules, laws, regulations, and other restrictions on the use of funds sufficient either to ascertain compliance or to seek additional assistance when required; and
5. Authority to disallow a transaction without being countermanded or subject to disciplinary action.

As Department Chair/Unit Director of _____, I agree that I am and will remain aware of the roles and responsibilities of individuals designated as “Role Manager(s)” authorized to establish IPF Approvers and Pre-Award Spending Approvers/Endorses in my department/unit. I also agree that, to the best of my knowledge, the Role Manager(s) will only grant the IPF Approver and Pre-Award Spending Approver roles to individuals in my department/unit meeting the qualifications noted above. If I become aware of any individuals serving in these roles who lack the above qualifications, then I will bring the matter to the attention of SPO, and take appropriate steps to remedy the situation.

Signature: _____

Date: _____

Name: _____

Title: _____

Department: _____