

Tips for Using Cayuse SP at UC Davis

Avoiding Routing and Assignment Issues

Cayuse Professional Profiles

Ensure the investigator's department is correct. If there are multiple listings of a unit, select the unit code used for contracts and grants. The Professional Profiles in Cayuse 424 contain the necessary information for accessing proposals in Cayuse SP and 424 and for routing and approval of Cayuse SP proposals. Keeping the Professional Profiles of people whom will serve as Key Personnel will mitigate Cayuse SP routing issues.

Detailed instructions are available at: <https://spark.ucdavis.edu/wp-content/uploads/Cayuse-Setting-up-your-professional-profile.pdf>.

The screenshot shows the 'Professional Profile' page for 'Apple, Charlie'. The page is divided into two main sections: 'General Personal Information' and 'Name'.

General Personal Information:

- * Name (with a dropdown arrow)
- Degrees
- Demographics
- Biosketches

1 Institutional Association:

- UC Davis (OVCR - Sponsored Programs) (with a red 'X' icon)
- Contact Info
- eRA Role
- Dept / Division / Title (highlighted with a blue box)
- Salary and Fringe Worksheet
- Performance Site
- Routing Profile (button)

Name Section:

- Name (with a 'Rename' button)
- Prefix:
- First: Charlie
- Middle:
- Last: Apple
- Suffix:
- NIH Commons ID:
- NASA NSPIRES ID:
- NSF ID:

Cayuse SP Internal Processing Form (IPF) Entry

Entering the correct information on the IPF will ensure your proposal/action routes to the appropriate administrative office and team within the administrative office.

>> General Information

General Proposal Information

* Admin Unit: Sociology

* Primary Administrative Contact: Amie Admin

Proposal Owner: Amie Admin

Project No:

* Short Project Name: 03/15/2020 Apple NIH (internal reference name)

* Project Start Date: 01/01/2021 Clear

* Project End Date: 12/31/2024 Clear

* Activity Code: [Click Here to Choose Activity Code](#)
01 Basic Research

* Proposal Type: New

* Instrument Type: Grant

- New
- New - Graduate Studies
- New - UC Davis Health
- Non-Competing Continuation/Progress Report
- Revision (competitive)
- Renewal (competitive)
- Resubmission
- LOI/Preliminary Proposal
- Supplement
- Amendment
- Recurring Contract
- After-the-Fact (ATF)
- Prior Approval
- Termination
- Administrative Action
- Select One

Select the unit that will administer the grant.

- Often associated with indirect cost return.
- Do not select an administrative cluster or similar unit.

For proposals, enter:

- [Sponsor Deadline] [PI] [Sponsor]

For award amendments, enter:

- [Action] [PI] [Sponsor]
- Include the SPO analyst's name if applicable

Identifies the requested action and appropriate administrative office.

- Select "New – Graduate Studies" for submission to the Office of External Fellowships, Division of Graduate Studies.
- Select "New – UC Davis Health" for **purely** industry-funded clinical trial protocol submissions to the UC Davis Health Clinical Trials Contracts Office.
- Select other appropriate Proposal Type for submission to SPO.

>> Investigators/Research Team

All key personnel must be entered on this page. If you wish to enter additional (non-key) personnel, you may do so. **Please note: any corrections or changes to the "List of Personnel" below during IPF review may require reauthorization of the Departments and/or Deans' Offices.**

List of Personnel:

Person	Unit	Role	Sponsored Effort	Cost Shared Effort	Total Effort	Allocation of Credit	Person Months		
Charlie Apple	Sociology (040320)	Lead Principal Investigator	30%	0%	30%	80%	2.7	Edit	Delete
Amie Admin	Sociology (040320)	Proposal Editor	0%	0%	0%	0%	0	Edit	Delete
Kassie Obelleiro	Med: Div Of Internal Med (Use the PI's Int Med Dept.) (049014)	Principal Investigator	30%	0%	30%	20%	2.7	Edit	Delete

Only add Key Personnel and personnel needing view/edit access:

- Use the "Proposal Editor" or "Other Participant – No Routing" for non-Key Personnel if no effort is included

Users here will automatically have access to the IPF and any associated Awards.

Change the Unit if necessary. Do not leave Units if one of the following qualifiers is indicated in the parenthesis.

- "Use the PI's Int Med Dept.": Change to the division within Internal Medicine.
- "Non Admin/Home Dept": Change to the correct unit code; may require checking with the department.
- "Use #####": Change to the unit code indicated.

Cost Sharing i

* 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.

Yes No

If yes, please fill in below:

Do not enter separate lines for each internal (UC Davis) unit providing cost sharing. Instead, **enter one line for ALL** internal cost sharing, following the instructions in red. Upload cost-sharing commitment letters/emails as Proposal Attachments.

Internal Cost Sharing

Unit	Account	Commitment	Match Type	Current Period	Entire Project	Comment	
Intl Cost Sharing (999999)	TBD	Mandatory	Cash Matching	\$20,000	\$80,000	Sociology will commit \$20...	View

View 1 - 1 of 1

Add Internal Cost Sharing

* Unit: Intl Cost Sharing

Period Total: \$ 20,000

Project Total: \$ 80,000

* Commitment Type: Mandatory

* Match Type: Cash Matching

* Account: TBD TBD if not known

Comment: Sociology will commit \$20,000 per year in Years 1 and 2. Pharmacology will commit \$20,000 per year in Years 3 and 4.

Add Unit Cancel

>> Proposal Attachments

When applicable, please attach the following documents:

- Proposal Announcement Guidelines (RFP, RFA, etc.)
- Budget (in Excel)
- Subcontractor documentation (letter of commitment, budget, budget justification, scope of work)
- Representations & Certifications

For industry-sponsored clinical trials, please attach the following documents:

- Sponsor Protocol
- Final Sponsor Budget
- Final Internal Budget
- Editable Agreement
- Exception to Policy

Add Attachment

Click Browse to select a file:

Choose File No file chosen

Document Type

Select Document Type ▼

Add

Reset

Attachment	File Type	Upload Type	Attachment Type	Access
TexasWomens_Sub.pdf Uploaded by: Amie Admin On: 03/11/2020 At: 4:14 PM PDT	Subcontractor Documents	IPF	Proposal	All Parties
RFP.pdf Uploaded by: Amie Admin On: 03/11/2020 At: 4:14 PM PDT	RFP or Sponsor Guidelines, etc.	IPF	Proposal	All Parties
BudgetJustification.pdf Uploaded by: Amie Admin On: 03/11/2020 At: 4:13 PM PDT	Budget Justification	IPF	Proposal	All Parties
budget.xlsx Uploaded by: Amie Admin On: 03/11/2020 At: 4:13 PM PDT	Budget	IPF	Proposal	All Parties
Scope.pdf Uploaded by: Amie Admin On: 03/11/2020 At: 4:12 PM PDT	Abstract	IPF	Proposal	All Parties

Upload the minimum required documents for SPO assignment (Scope of Work, Budget, Budget Justification and Subaward documents, if applicable).

>> Approving Units

The units listed below will be notified to authorize this proposal record.
Please be certain every unit and/or campus resource involved with or used by this proposal is listed on this screen before submitting the proposal record for routing. Failure to include all affected resources/units may result in the necessity of rerouting for approvals.

OR

One of the following offices will authorize this proposal on behalf of the University.
Do **not** add them as approving units.

- Sponsored Programs Office
- Office of Clinical Trials, School of Medicine
- Office of Graduate Studies

Add Approving Unit

Unit:

List of Approving Units: (to edit the information, remove first, then add back)

Routing Order 	Unit Code	Unit	Role(s)
1	040320	Sociology	Lead Principal Investigator, Admin Unit
2 ▼	049054	Med: Pharmacology	Principal Investigator
3 ▼	43	School of Medicine (Use 049000)	Rollup From - 049054
4 ▼	999999	Intl Cost Sharing	Cost Share/Cash Matching Unit

Review the units listed and the associated role(s) for accuracy. A unit including "(Use #####)" should only be listed if the associated role indicates it is a rollup from another unit as seen below. Make any needed corrections on the appropriate IPF tab.

Re-route the units as appropriate. List roll-up units after the unit for which they are rolling-up. List Intl Cost Sharing (99999) last.

Review the Approvals tab after submitting the IPF for routing.

Ensure all users listed here certify the IPF. Only Lead PI's and co-PI's should be listed here.

Approvals | Compliance | Status History | Advance Account | Awards | [Document Icon] | [Attachment Icon]

The above proposal has been successfully submitted. All lead/principal investigators and approving units listed below have been notified and should electronically authorize (in routing order for units) this proposal before it is received by the UC Davis Sponsored Programs Office.

Investigator(s) who must certify this Proposal

Investigator	Role	Decision
Charlie Apple	Lead Principal Investigator	Not Yet Reviewed

Unit(s) that must authorize this proposal

Order	Unit	Authorizing Person(s)	Authorizing Decision
1	Med: Intl Med- Infectious Disease	Stuart Cohen , Kaitlyn Kirk	Not Yet Reviewed
2	Med: Intl Med (Use the PI's Int Med Dept.)	Timothy Albertson , Monique Vasquez	Not Yet Reviewed
2	Med: Div Of Internal Med (Use the PI's Int Med Dept.)		Not Yet Reviewed
3	School of Medicine (Use 049000)	Anuurad Erdembileg , Tammi Olineka , Tasska Johnson , Randi Freeman	Not Yet Reviewed
4	UC Davis Sponsored Programs Office	Admin Office	

If the "Authorizing Persons" field is blank or includes "OR Cayuse Help":

1. Email ORCayuseHelp@ucdavis.edu and request the IPF status be returned for correction.
2. Review the Cayuse IPF [Approving Units](#) tab to determine needed changes.
3. Make needed changes.
4. Submit the proposal for routing (again).