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## Professional Profile Overview

Cayuse Professional Profiles contain the necessary information for accessing proposals in Cayuse SP and 424 and for routing and approval of Cayuse SP proposals. Principal Investigators, contract and grant administrators and others that play a role in the proposal process must have a Cayuse Professional Profile.

### Tips

- Ensure smooth routing in Cayuse SP by ensuring the unit code listed is the code used by the department/unit for contracts and grants accounting.
- Streamline budget calculations by keeping salary and appointment information current.
- Improve search speed by selecting the institution when searching for a user.

## Find a Professional Profile

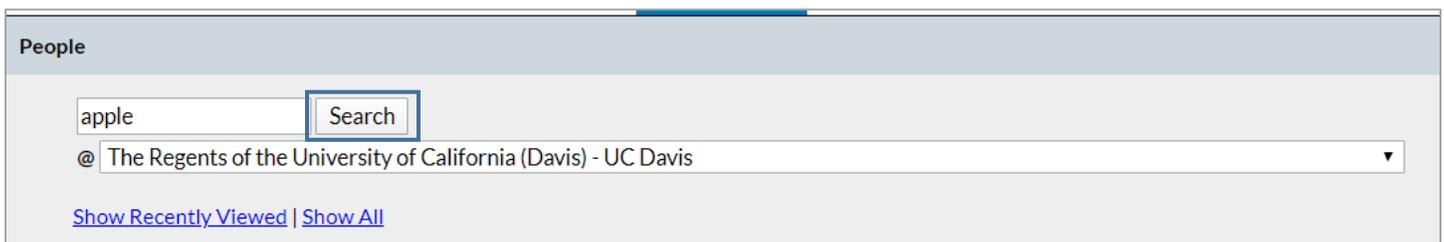
1. Login to the Cayuse Research Suite (<https://ucdavis.cayuse424.com>) using your Kerberos. *If you do not have a Kerberos User Name, work with your department to create one and provide the user Kerberos ID, email address and UC Davis Employee to [ORCayuseHelp@ucdavis.edu](mailto:ORCayuseHelp@ucdavis.edu).*
2. Select “Cayuse 424”.



3. Select “People”.



4. Type the last name in the Search field, change the “@” field to “The Regents at the University of California (Davis) – UC Davis” and then select “Search”.



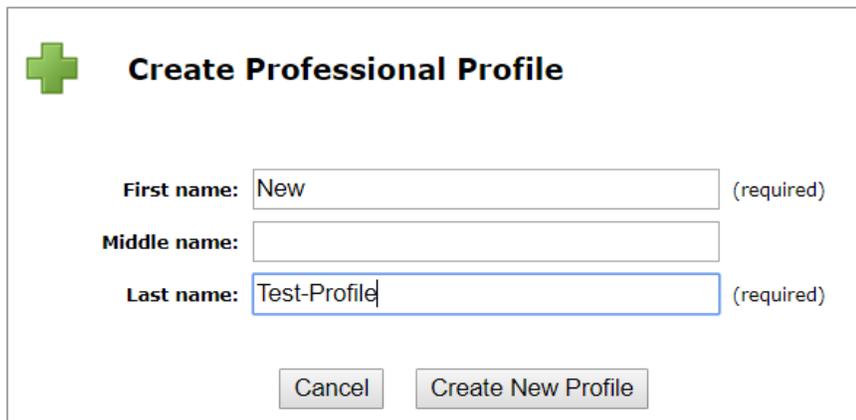
## Create a Professional Profile

Do not create a profile for someone else at UC Davis. Contact [ORCayuseHelp@ucdavis.edu](mailto:ORCayuseHelp@ucdavis.edu) if you need to create a profile for another UC Davis user.

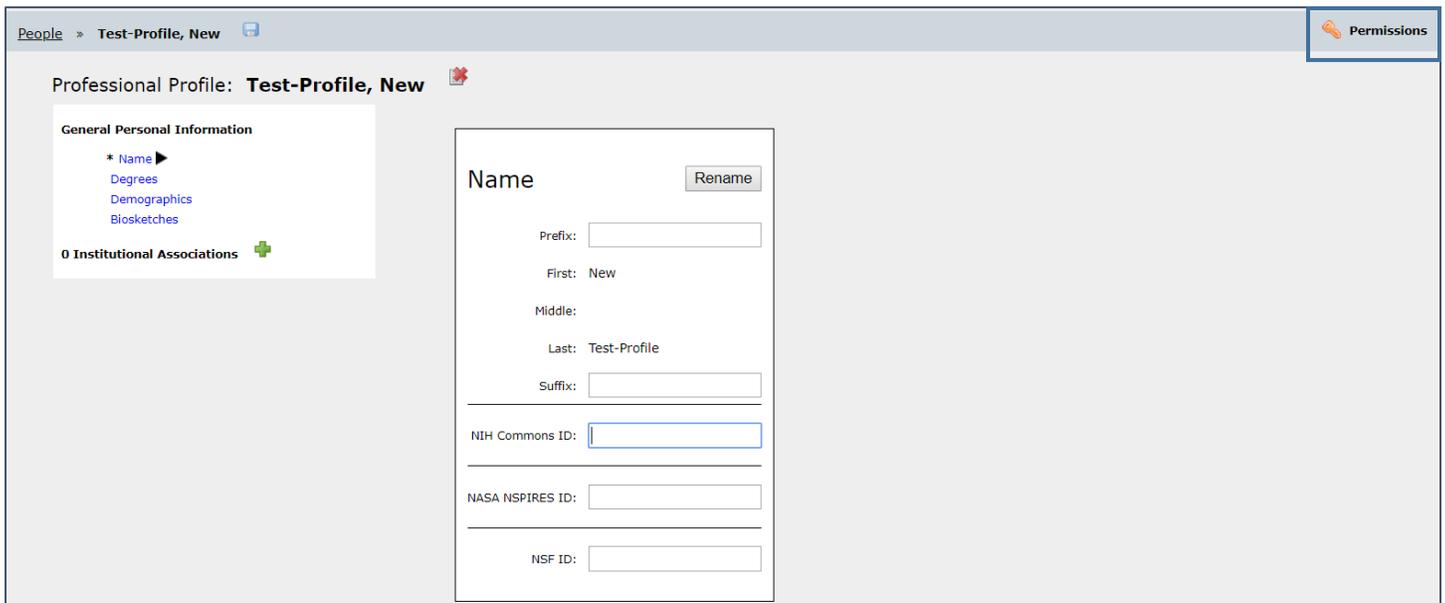
1. Follow the [steps above](#) to ensure a Professional Profile does not exist for the user.
2. From the People/Professional Profile list, select “+ Person”.



3. Complete the pop-up window and select Create New Profile. Include the person’s middle name if applicable.

A screenshot of a 'Create Professional Profile' pop-up window. The window has a green plus sign icon in the top left corner. The title is 'Create Professional Profile'. There are three text input fields: 'First name:' with the value 'New' and '(required)' next to it; 'Middle name:' which is empty; and 'Last name:' with the value 'Test-Profile' and '(required)' next to it. At the bottom of the window, there are two buttons: 'Cancel' and 'Create New Profile'.

4. Provide permissions/access to this Professional Profile by selecting the Permissions (key) icon. Provide access to contract and grant staff the support the investigator.

A screenshot of the 'Test-Profile, New' professional profile page in the Cayuse system. The breadcrumb navigation at the top left shows 'People > Test-Profile, New'. In the top right corner, there is a 'Permissions' icon (a key) which is highlighted with a red rectangular box. The main content area is titled 'Professional Profile: Test-Profile, New' and features a sidebar on the left with 'General Personal Information' (including links for Name, Degrees, Demographics, and Biosketches) and '0 Institutional Associations'. The main form area is titled 'Name' and includes a 'Rename' button, a 'Prefix' field, 'First: New', 'Middle:', 'Last: Test-Profile', a 'Suffix' field, and several ID fields: 'NIH Commons ID:', 'NASA NSPIRES ID:', and 'NSF ID:'.

a. Select "+ Add user".

People » Test-Profile, New » Permissions

Permissions for Professional Profile: **Test-Profile, New**

[+ Add user](#)

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

i. If the person you are adding is listed under Recently Used, select their name and skip to step 7.b. below.

### Add Security Principal

[Show All](#)

Select *Users* below to provide access to this Professional Profile.

**Recently Used: 15 principals**

Type	User	Profile Name
<b>U</b>	ipfapprover	Apple, Charlie
<b>U</b>	amieadmin	Admin, Amie

ii. If the person is not listed under Recently Used, enter their last name in the text field and select "Search".

### Add Security Principal

[Show All](#)

Select *Users* below to provide access to this Professional Profile.

**Recently Used: 15 principals**

Type	User	Profile Name
<b>U</b>	ipfapprover	Apple, Charlie
<b>U</b>	amieadmin	Admin, Amie

- iii. If the person is listed under Search Results, select their name and select “Close”. Then continue to step 7.b. below.

## Add Security Principal close

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

Select *Users* below to provide access to this Professional Profile.

**Search Results:** 5 principals match

Type	User	Profile Name
U	cayuse1	Test1, Cayuse
U	cayuse2	test2, Cayuse

- iv. 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.
- b. Set the level of permissions to grant by checking and unchecking the appropriate boxes.

Permissions for Professional Profile: **Test-Profile, New**

	List	Read	Write	Autofill	Delete	Change Permissions	Add User	Remove User
<span>Obelleiro, Kassie M (kassie@ucdavis.edu)</span>	<input checked="" type="checkbox"/>							
<span>Test1, Cayuse (cayuse1)</span>	<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 type="checkbox"/>

5. Return to the profile to finish completing the required information by selecting the profile name in the breadcrumbs. Once a user is added to the Permissions page, they may finish completing the profile.

Overview
Opportunities
Proposals
Routing
People
Institutions
Reports
Admin

People
» Test-Profile, New
» Permissions

Permissions for Professional Profile: **Test-Profile, New**

	List	Read	Write	Autofill	Delete	Change Permissions	Add User	Remove User
<span>Obelleiro, Kassie M (kassie@ucdavis.edu)</span>	<input checked="" type="checkbox"/>							
<span>Test1, Cayuse (cayuse1)</span>	<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 type="checkbox"/>

6. Complete the following General Personal Information sections. **Do not complete the Demographics and Biosketches sections.**

a. Name:

- i. Add the NIH Commons ID if the person will work on or submit proposals to the National Institutes of Health (NIH).
- ii. Select “Rename” to change the person’s name.

Professional Profile: **Test-Profile, New**

**General Personal Information**

- \* Name
- Degrees
- Demographics
- Biosketches

0 Institutional Associations

**Name**

Prefix:

First: New

Middle:

Last: Test-Profile

Suffix:

NIH Commons ID:

NASA NSPIRES ID:

NSF ID:

b. Degrees (Optional): Add relevant degree information.

People » Test-Profile, New

Professional Profile: **Test-Profile, New**

**General Personal Information**

- \* Name
- \* Degrees
- Demographics
- Biosketches

0 Institutional Associations

**Degrees**

NIH Degrees (comma separated, max of 3):

Senior/Key Person Degree Type:

Senior/Key Person Degree Year:

NSF Degree Type:

NSF Degree Year:

7. Add the Institutional Association by selecting the plus (+) sign. This is a **critical** step as it associated the profile with UC Davis.

People » Test-Profile, New

Professional Profile: **Test-Profile, New**

General Personal Information

- \* Name
- \* Degrees ▶
- Demographics
- Biosketches

0 Institutional Associations

**Degrees** ?

NIH Degrees (comma separated, max of 3): PhD, MD

Senior/Key Person Degree Type:

Senior/Key Person Degree Year:

NSF Degree Type: Please Select... ▼

NSF Degree Year:

- a. Find “The Regents of the University of California (Davis) – UC Davis” on the list and select “Create Institutional Association”.

**Create Institutional Association**

Institution: The Regents of the University of California (Davis) - UC Davis ▼

Create Institutional Association Cancel

8. Complete Contact Info section.

UC Davis

**Contact Info**

Street 1: 1850 Research Park Drive

Street 2:

City: Davis

State/Province: California ▼

Zip/Postal Code: 95618-6153 Must use Zip+4 format

County: Yolo

Country: United States of America ▼

Phone: 555-555-5555

Fax:

Email: nptest-user@ucdavis.edu

9. Complete the eRA Role section. **Critical for anyone that will use Cayuse 424 as it grants the relevant access/permissions in Cayuse 424.**
- Principal Investigator: Any person that may be serve as a Lead Principal Investigator, co-Principal Investigator or an any other investigator role on a proposal in Cayuse 424. **Only user with this role will display in the Principal Investigator list.**
  - Assistant: Anyone that may assist with proposal preparation in Cayuse 424.
  - The other three roles are reserved for the Sponsored Programs office.

UC Davis  
eRA Role

Role(s):  Principal Investigator  
 Assistant  
 Administrative Official  
 Signing Official / "AOR"  
 Payee

10. Complete the Department/Division/Tile section. This is a **critical** step for all users as is manages Cayuse SP routing and approvals.
- Select the unit that will be used most often to approve the person’s effort on proposals for extramural funding. Having the incorrect unit will cause routing errors in Cayuse SP any time this person is added to a Cayuse SP Proposal/Internal Processing Form.

UC Davis  
Department / Division / Title

[Select Division and Department] ▼

Code Title

Department: 930390 Bodega Marine Laboratory

Division: 60 VC Research

Position/title: \_\_\_\_\_

\_\_\_\_\_

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?  
 ▼

11. Complete the Salary and Fringe Worksheet section.

- a. Employee ID: Enter the person’s UC Davis ID if known.
- b. Appointment Type: Enter the person’s relevant appointment months and associated salary. Use the annualized salary to aid in budget calculations. *Learn about annualizing salary and other proposal budget preparation topics in our [Preparing a Proposal Budget Toolkit](#).*
- c. Select Import Institutional Rates, then select the appropriate rate type.

The screenshot shows the UC Davis 'Salary / Appointment type' and 'Fringe Worksheet' interface. The 'Salary / Appointment type' section includes an 'Employee ID' field and an 'Appt Type' table. The 'Fringe Worksheet' section includes an 'Import Institutional Rates' button, a table with 'Academic senate' selected, and 'Base Fringe Rate' and 'Fringe Rate Total' fields.

Appt Type:	
Calendar:	Salary
Academic: 9	100000
Summer: 3	33333

Category	Entry (\$)	Factor (%)
Academic senate		38.1

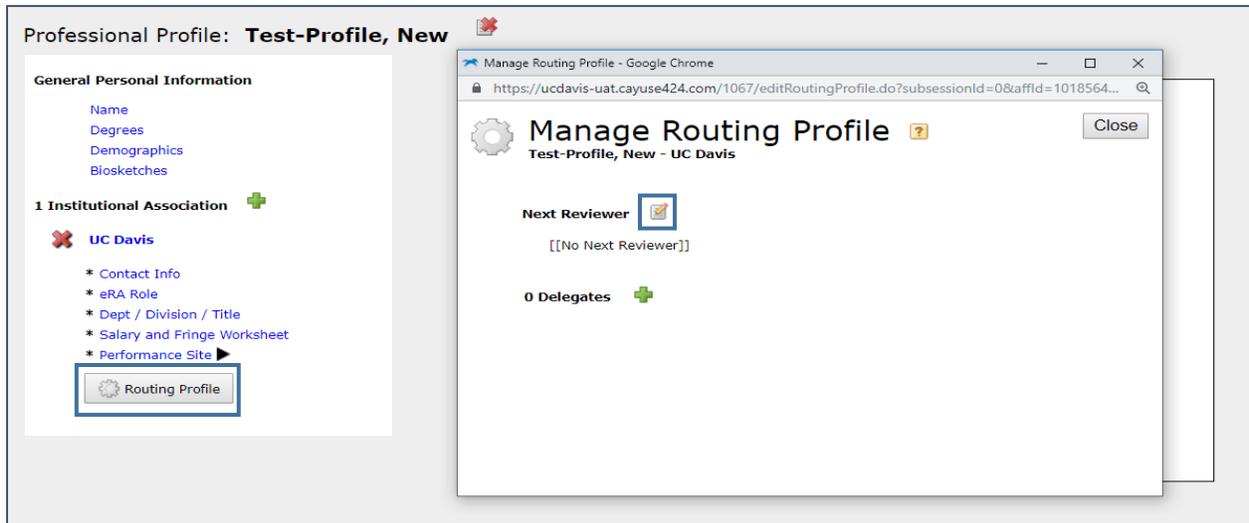
Base Fringe Rate: %  
Fringe Rate Total: 38.10%

12. Complete the Performance Site section by adding the location where most of the person’s work will be performed. If the DUNS number and Congressional District are not auto-populated, enter that information as well.

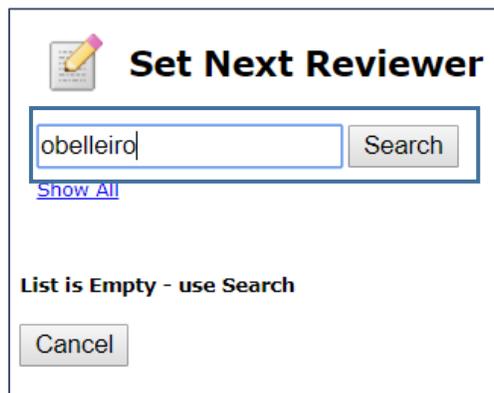
The screenshot shows the UC Davis 'Performance Site' form. It includes fields for Organization Name, Street 1, Street 2, City, State/Province, Zip/Postal Code, County, and Country. There are also fields for Organization DUNS and Congressional District.

Organization Name: University of California, Davis  
Street 1: 1850 Research Park Drive  
Street 2:  
City: Davis  
State/Province: California  
Zip/Postal Code: 95618-6153  
County: Yolo  
Country: United States of America  
Organization DUNS: 047120084  
Congressional District: CA-003

13. Routing Profile (optional): If the profile is for a Principal Investigator, set up their Routing Profile. This will save time when creating Cayuse 424 proposals as the routing chain will be auto-populated anytime this person is added as the Lead Principal Investigator to a Cayuse 424 proposal. Only add the usual SPO analyst and others that must approve the 424 proposal separate from Cayuse SP. **Use this option sparingly.**
- Select the Next Reviewer icon to add a person after the Lead Principal Investigator in the Cayuse 424 proposal routing chain.



- Enter the person's last name in the search field and select "Search".



- c. Select the person's name under Search Results, and then select "Set Next Reviewer".

**Set Next Reviewer**

obelleiro Search

[Show All](#)

**Search Results:**

Obelleiro, Kassie M (OVCR - Sponsored Programs)

Set Next Reviewer

Cancel

- d. Select "Close" when the routing chain is complete.

**Manage Routing Profile** ?

Test-Profile, New - UC Davis

**Next Reviewer** ✎

Obelleiro, Kassie M (OVCR - Sponsored Programs) ✖

**0 Delegates** +

Establish others to approval proposals on your behalf.

Close

## Update a Professional Profile

1. [Find and open the Professional Profile.](#)
2. Update the sections as needed. However, **never select the X next to UC Davis.** To change the Department/Unit, select the Dept/Division/Title section and make the appropriate changes. See [Create a Professional Profile](#) for the details of each section.

People » **Apple, Charlie** 

### Professional Profile: **Apple, Charlie**

#### General Personal Information

- \* Name 
- Degrees
- Demographics
- Biosketches

#### 1 Institutional Association

-  **UC Davis (OVCR - Sponsored Programs)**
- Contact Info
- eRA Role
- Dept / Division / Title**
- Salary and Fringe Worksheet
- Performance Site

 Routing Profile

### Name

Prefix:

First: Charlie

Middle:

Last: Apple

Suffix:

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NIH Commons ID:

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NASA NSPIRES ID:

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NSF ID: