Learning Objectives

01 Role Managers
Know the responsibilities and functions of Role Managers

02 Critical Roles
Know the critical Research Contact Roles in Cayuse

03 Identify Roles
Be able to identify Research Contact Role Assignments

04 Establish Roles
Be able to establish Research Contact Roles
Cayuse

- Cayuse SP: Internal routing and approval
- Cayuse 424: Application submission to most Federal sponsors
- System Administration: Unit Roles list and System Administration applications

Cayuse Research Suite

- Routing and Approval
- Approving Units
- Professional Profiles
- Application
- Cayuse SP
- Cayuse 424

Cayuse Roles

- Professional Profiles: Personnel, Salary and Appointment Information
- Research Contacts: Administrative Permissions for Administering Units
- Investigators/Research Team: IPF-Specific Access

Application Help:
- Research Suite Support Center
Research Contact Roles

Administrative roles for administering units of proposals, awards and subawards

Role Managers

Unit Heads complete a Role Delegation Authorization Form, and request establishment of Role Managers for their units.

1. Coordinate with Unit Head
   Accurate and appropriate role delegation

2. Grant Access
   Establish Research Contact roles

3. Unit Subject Matter Expert
   Provide guidance to unit investigators and staff

Critical Research Contact Roles

IPF Approver
Approves proposals/IPFs administered by their unit and/or involving investigators from their unit
The Unit Head or their delegate

Pre-Award Spending Approver
Endorses Advance Accounts requests for proposals submitted through their unit (as administering unit)
The Unit head or their delegate

Role Manager
Establishes Research Contact roles for their administering unit
Usually contract and grant administrators and other staff roles
Other Research Contact Roles

1. **Proposal Data Access**
   May view proposal/IPF details in an administering unit

2. **Award Data Access**
   May view award details in an administering unit

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Activity 1: Who Can Help?

Read the scenario and select the Research Contact Role(s) that can provide assistance.

1. A PI would like to know the status of their proposal that a department admin submitted on their behalf in Cayuse SP. The department admin is out of the office. What Research Contact Role allow the needed access to check the status of the proposal/IPF?
   A. Role Manager
   B. Proposal Data Access
   C. Award Data Access

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Activity 1: Who Can Help?

Read the scenarios and select the Research Contact Role(s) that can provide assistance.

2. A PI would like to know the status of an award they received from NIH and that was submitted to SPO via email. What Research Contact Roles allow the needed access to check the status of the award?
   A. Role Manager
   B. Proposal Data Access
   C. Award Data Access
Activity 1: Who Can Help?

Read the scenario and select the Research Contact Role(s) that can provide assistance.

3. A new person is hired as a contract and grant admin in your unit. Who can give them the necessary VIEW access for both Proposals and Awards in your admin unit? 
   A. Role Manager 
   B. Proposal Data Access 
   C. Award Data Access

Research Contact Role Management

Keeping Research Contact Roles current will help mitigate Internal Processing Form (IPF) routing and approval.

Maintain Research Contact Roles

Role Managers should work with their unit head and others in their units, as appropriate, to ensure the Research Contact Roles for their unit are kept accurate and current.

01 Current-ness
   - Ensure the Research Contact Roles are current

02 Role Manager Changes
   - Unit Heads request new Role Managers from SPO

03 Unit Head Changes
   - Unit Head submits Role Delegation Authorization form to SPO
   - Role Manager removes historical IPF Approver and add new unit head
Identifying Research Contacts

Access Research Contacts
From the Cayuse Research Suite:
• Select “Research Contacts”

From Cayuse SP:
• Select “More”
• Select “View Roles By Unit”

Find the Administrative Unit
• Select “list” or select/click in the text field
• Find and select the unit

The assigned roles will display.

Access from Cayuse SP

Access from Cayuse Research Suite
Find the Unit

- (Image)

Find the Unit

- (Image)

View Research Contact Roles

- (Image)
Activity 2: Identify Role Assignments
Find role assignments for Sponsored Programs

1. Select “Pause” when you are ready to begin.
2. Login to https://ucdavis-uat.cayuse424.com
   - Username: amieadmin
   - Password: training
3. Find “OVCR – Sponsored Programs” and note one person listed in each of the following roles:
   - Role Manager: ____________________
   - IPF Approver: _____________________
   - Pre-Award Spending Approver*: ____________________
4. Select “Play” when have the answers.

Managing Roles

Cayuse Research Suite

- Cayuse Research Suite
- UC Davis Research Administration Applications
- Application Help
- Research Contacts
- My Dashboard
- Proposal Management
- View Roles By Unit
- Manage Roles
Managing Research Contact Roles

Select or Add a Contact
If the person is not listed in the Contacts drop-down:
- Select “Add Contact”
- Find and select the user’s name
- Select “Add Contact”

Add or Delete Roles
To add a role:
- Select the department/unit of the applicable role
- Select the role to add from the Role drop-down
- Select “Add Role”
To delete a role:
- Select “Remove Role” next the applicable role

View detailed instructions in the Handbook for Role Managers.

Adding and Deleting Roles

Activity 3: Establish a Role
Logged in as Amie Admin, assign yourself as a Role Manager for “OVCR – Sponsored Programs”.

Login to: https://ucdavis-uat.cayuse424.com
- Username: AmieAdmin
- Password: training

Access Research Contacts
Select “Manage Roles”

Assign a Role
- Find yourself (use Amie if not found)
- Assign yourself/Amie as “Role Manager” for OVCR – Sponsored Programs
Learning Objective Review

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Contact Us


Sponsored Programs
Office of Research
University of California, Davis
[https://research.ucdavis.edu/proposal](https://research.ucdavis.edu/proposal)
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Training Officer


Resources
Common Acronyms

- AB20: Assembly Bill 20
- AC: Academic Year
- BAA: Broad Agency Announcement
- BOA: Biological Use Approval
- BY: Budget Year
- CGA: Contracts and Grants Accounting
- COI: Conflict of Interest
- DAA: Disability Accommodation
- ERA: Electronic Research Administration
- F&A: Facilities & Administrative rates; also referred to as indirect cost rate (IDC or ICR) or "overhead"
- FOA: Funding Opportunity Announcement
- HASTOC: Human Anatomic Specimens and Tissue Oversight Committee
- IACUC: Institutional Animal Care and Use Committee
- IPF: Internal Processing Form
- IP: Intellectual Property
- IRB: Institutional Review Board
- PI: Principal Investigator
- PRAM: Progress Report Additional Materials (NIH)
- PY: Project Year
- RPPR: Research Performance Progress Reports
- RC: Research Compliance
- RCR: Responsible Conduct of Research
- RFA: Request for Applications
- RFP: Request for Proposals
- PHS: Public Health Service
- PR: Public Relations
- PY: Project Year
- SBO: Small Business Office
- SBIR: Small Business Innovation Research
- SNAP: Streamlined Non-Competing Award Process (NIH)
- SPO: Sponsored Programs unit in the Office of Research
- STTR: Small Business Technology Transfer
- UCDH: University of California, Davis, Health
- UC Supercomputer

UC Davis – Cayuse Resources

- Cayuse SP Quick Reference
- Cayuse: Handbook for Role Managers
- Cayuse SP Role Delegation Authorization Form
- Cayuse SP Training Videos
- Handbook for Department Contract & Grant Staff, Principal Investigators and Approvers (For submission to SPO)
- School of Medicine Cayuse SP Guidelines (For submissions involving School of Medicine units or investigators)
- Handbook for Department Industry-Funded Clinical Trial Staff, Principal Investigators and Approvers (For submissions to the UCDH Contracts Clinical Trials Contracts Office)

Sponsored Programs Contacts

- SPO Contact Us webpage: [http://research.ucdavis.edu/contact-us/sponsored-programs/](http://research.ucdavis.edu/contact-us/sponsored-programs/)
- Proposals: proposals@ucdavis.edu
- Awards: awards@ucdavis.edu
- Subawards: subawards@ucdavis.edu
- Closeouts: closeouts@ucdavis.edu
- eRA Help: SPOeRAhelp@ucdavis.edu
- Cayuse Help Desk: ORCayuseHelp@ucdavis.edu
- Training: SPOTraining@ucdavis.edu
Office of Research Listservs

- C&G Listserv: https://lists.ucdavis.edu/sympa/info/ovcr-cg
- Other Office of Research Listservs: http://research.ucdavis.edu/resources/listserv-subscriptions/
  - Core Facilities Program
  - Digital Millennium Copyright Act (DMCA)
  - Funding
  - Institutional Review Board (IRB)
  - Research Compliance and Integrity (RCI)
  - Responsible Conduct of Research (RCR)
  - Research Unit Lists
- SPARK: https://lists.ucdavis.edu/sympa/subscribe/spark

Research Administration Forum
Join us via Zoom the fourth Wednesdays at 8:30 am!
Watch previous forums on YouTube

Live and Recorded Learning Opportunities

SPO BAASICS
Budget, Application, Award and System Instruction for Comprehensive Skills (BAASICS) are training sessions designed to help contract and grant administrators at UC Davis build and hone their research administration skills. Learn more

Staff Development and Professional Services Classes
SPO offers classes in the Research Administration Certificate Series (RACS) and the eRA Train the Trainer certificate series.