

Quick Start Guide for Cayuse - Cayuse SP/424

WHAT IS Cayuse?

Cayuse (electronic Sponsored Research Administration) is a software tool IIT has adopted for routing proposals, contracts, and other types of agreements. Cayuse must now be used to submit Federal grant applications to Federal agencies that require submission through grants.gov (*Note: NSF FastLane is still being used to submit NSF proposals*).

Cayuse consists of three parts:

- **Cayuse SP-** to be used for proposal routing prior to proposal submission
- **Cayuse 424-** to be used to submit proposals to the Federal agencies that require grants.gov submission

Note: Your access level determines what you are able to see. Deans can view records for all units that roll up to them; department chairs can view records for all faculty/staff in their department; Individual users can only view their own records.

SYSTEM REQUIREMENTS

Cayuse is fully supported at this time on Internet Explorer and Mozilla Firefox. Google Chrome and Safari are provisionally supported and may not allow attachments to be uploaded. It is therefore recommended that you use a current version of Mozilla Firefox or Internet Explorer.

- Cookies, JavaScript and pop-ups must be enabled for the Cayuse site to work properly
- Detailed information on browser support & configuration can be found at:
<http://support.cayuse.com/docs/browser-support-configuration>

LOGGING IN

Access Cayuse from your “myIIT” page – Once you log in, click on the “Research Tab” and then “Cayuse Grant Software”

<https://my.iit.edu/cp/home/displaylogin>

Log in using your IIT login – both User ID and password

GETTING STARTED WITH SP

Evisions Research Suite

3.1

Research Administration Modules

Cayuse SP (Sponsored Projects)

Cayuse 424

1. From the Cayuse Research Suite homepage, select “Cayuse SP (Sponsored Projects).”
2. Select “Start New Proposal” to begin a new record.
3. **Before you begin, read the information/instructions provided at the top of every page. This information has been provided to assist users with frequently asked questions and will help users avoid making common mistakes.**
4. Complete the information on the “General Information” tab. All fields with an *asterisk are required fields. When complete, SAVE this page. *If you are submitting a proposal to a Federal sponsor that requires submission through grants.gov (except for NSF), select “Create a Paired Proposal” and see the instructions below for **GETTING STARTED WITH 424**.*
5. Complete each item in the item list on the left.
Note: For the budget, use the OSRP internal budget spreadsheet to create and obtain approval from your OSRP research administrator. prior to entering your budget into SP. **Recommendation:** Upload your budget using the attachments page or email your budget to your assigned research administrator. Once the budget is finalized the budget can be entered into the system by yourself or your assigned research administrator
6.  Before you can submit your SP record for routing, a green check mark must appear next to each section, indicating that section is complete. A proposal cannot be submitted for routing until ALL sections are complete.
7. Submit your proposal for routing when the budget has been finalized and all forms are complete. **Recommendation:** Complete all sections, except for the budget section. Once the budget section is complete, you need to route the record. This may help to prevent questions from your department chair or dean. You will still need to certify the proposal. *If this is your first time using SP, we request that you [contact your OSRP research administrator](#) for review and approval of your proposal record prior to initiating routing.*
8. The final step is to certify your SP record. To certify or approve a proposal, go to your PI Certification Inbox (if you are a PI or co-PI) or to your Dept Approval Inbox (if you are a dean/chair/director).

Note: Submitting your proposal for routing will lock your SP proposal record and you will be unable to make any further changes. If you have a paired 424 proposal, it will also be locked preventing any further changes to any of the forms. You will, however, be able to revise any uploaded PDF attachment files, such as project narrative, biographical sketch, project abstract, etc.

CREATING A PAIRED 424 PROPOSAL

1. Complete steps 1-4 in the section above “GETTING STARTED WITH SP.”
2. After you have saved the first page, scroll to the bottom of the General Information tab and select “Create a Paired Proposal.”

3. Creating a paired proposal will take you to Cayuse 424. Here you will be asked to create a proposal type.
 - **Grants.gov/Research.gov**- use for electronic submission to a Federal sponsor when we are the prime institution (*most users will need to select this option*)
 - **Other Proposal** – use to obtain Federal forms that are not being submitted electronically (you will likely never select this option)
 - **Research Subaward Proposal**- use if you are creating a subaward to send to another institution
 - **Training Subaward Proposal**- use if you are developing a training budget to send to another institution (you will likely never select this option)
4. Select a Federal Opportunity Number. If a number is not listed, use the “Download Opportunities” button at the top, center of the page.



5. Once you have located or downloaded an Opportunity Number, click the green plus sign next to the opportunity number.

6. Ensure you have selected the correct opportunity. If not, you can “Select A Different Opportunity.”
 - Ensure the short proposal name is accurate
 - Enter the Lead PI (Principal Investigator) by using the “Search for PI” field
 - Select the appropriate IDC (Indirect Cost Rate)
 - Enter the # of budget periods you will be requesting
 - Ensure the due date is correct and select a validation type
 - Select “Create Proposal”

7. Enter information as required:
 - In order to “scroll” through the proposal package, use the navigation bar on the left of the screen
 - Check forms that need to be included in your proposal package
 - Use the OSRP internal budget spreadsheet to create and obtain approval from your OSRP research administrator prior to entering your budget into 424.
 - Use the error and warning check feature at the bottom of the page to ensure you have completed all parts of the package accurately

9. Notify your OSRP research administrator when your package is ready to be submitted.

<input checked="" type="checkbox"/>	SF424 RR
	1
	2
<input checked="" type="checkbox"/>	RR Performance Sites
	1
<input checked="" type="checkbox"/>	RR Other Project Information
	1
<input checked="" type="checkbox"/>	RR Key Persons
	1
<input type="checkbox"/>	RR Budget
	1
	2
	3
	4
<input checked="" type="checkbox"/>	PHS 398 Modular Budget
	1

TERMINOLOGY CHANGES

Common Terminology	Cayuse Terminology
Principal Investigator	Lead Principal Investigator
Co-PI	Principal Investigator
Routing Sheet	IPF (Internal Processing Form)
OSRP #	Proposal Number

CAYUSE DICTIONARY

- **Internal Processing Form (IPF)**- SP's Internal Processing Form (IPF), formerly called the Routing Sheet, is a transmittal sheet containing all the data tracked by the university and entered into the database. All electronic certifications and authorizations are time and date stamped and recorded on the IPF.
- **Lead Principal Investigator**- Every proposal must have one (1) Lead Principal Investigator. This individual is primarily responsible for the technical, regulatory, and financial aspects of the project.
- **Principal Investigator** Other key personnel (formerly referred to as co-investigators) or other roles such as Investigator, Senior Personnel, etc.
- **Prime Funding Agency**- The agency from which the funds ultimately originate. This is applicable when IIT will be included as a subcontractor on a proposal being submitted by a partnering organization. In these situations, **the partnering organization is the Sponsor** and **the agency from which the funds originate is the Prime Funding Agency**. For example, IIT receives a subaward from the University of Chicago (UC) on a proposal submitted to NSF. UC would be listed as the Sponsor and NSF would be listed the Prime Funding Agency. If the proposal were being submitted directly to a Sponsor, you would not list a Prime Funding Agency.
- **Proposal Number**- Generated automatically in SP after the General Information section of the IPF is saved. It starts with two digits (the fiscal year) and is followed by a consecutively generated four-digit number.
- **Project Number**- Assigned to awarded projects in Cayuse SP that contains the contents of all associated proposals, awards and subcontracts for the entire life of a funded project.
- **Short Project Name**- This is for internal reference only and helps OSRP to match a proposal with a PI. Use the following format for your proposal Short Name: PI/Co-PI Last Name _Prime Funding Agency (if applicable)/Sponsor _Mechanism (if applicable)_ Due Date. (Example: SMITH_ NIH/UC_R01_6/5/2013).
- **Pairing a Proposal**- Proposal records developed in Cayuse SP may be paired with proposals in Cayuse 424. To ensure proper linking, you should begin building the proposal in SP. The Cayuse 424 Proposal link launches the paired 424 proposal. The only information currently shared between SP and 424 is the proposal number, short title, and proposal due date. The 424 proposal identifier

links the proposals together, but no data is exchanged. OSRP will submit the actual proposal to Grants.gov via 424.