

Cayuse 424: Routing and Submitting a Proposal

This document describes how to

- Determine if the proposal is complete.
- Approve the proposal and route it to OSP for review and submission to Grants.gov or Research.gov.
- Add an approval delegate.
- Determine the submission status.

Overview

- The PI must route/approve the proposal in Cayuse 424 unless the s/he has added a routing/approval delegate to his/her Professional Profile; that delegate can approve proposals on the PI's behalf.
- PIs should choose an approval delegate if they will need, or want, anyone else to approve proposals on their behalf for submission to OSP.
- To add a delegate, please see "Adding a PI approval delegate" on page five.

The proposal is ready to submit when

- All required forms are complete.
- All required PDFs have been attached and reviewed.
- There are no errors in the **Errors / Warnings / Info** validation list and any warnings and informational notes have been carefully reviewed.
- The final review has been completed. Click the **Final Review** button to have Cayuse 424 perform a re-evaluation of the proposal to detect any errors or warnings that may have been missed.

The screenshot displays the Cayuse 424 proposal submission interface. The top navigation bar includes tabs for Overview, Opportunities, Proposals, Routing, People, Institutions, Reports, and Settings. The user is identified as Jeff Administrator (u0999999) with a Sign out link.

The main content area shows the proposal details for "Test Proposal NIH R01". The left sidebar contains a checklist of required documents, including SF424 RR, RR Performance Sites, RR Other Project Information, RR Key Persons, RR Budget, PHS 398 Modular Budget, RR Subaward Budget Attachment, PHS 398 Cover Page Supplement, PHS 398 Research Plan, Incision Environment Report, PHS 398 Checklist, and PHS 398 Cover Letter.

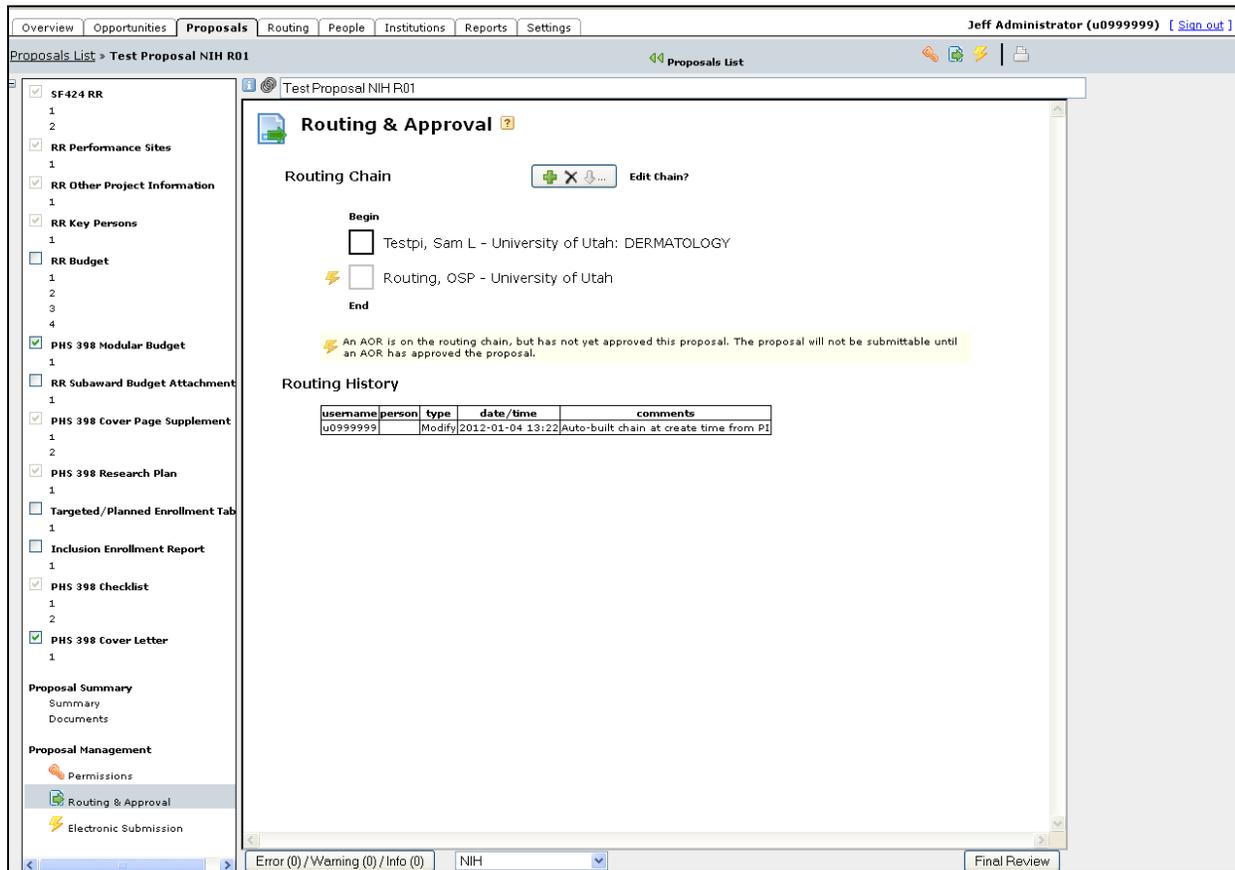
The main form area includes sections for:

- 8. TYPE OF APPLICATION:** Radio buttons for New, Resubmission, Renewal, Continuation, and Revision.
- 9. NAME OF FEDERAL AGENCY:** National Institutes of Health Stage.
- 10. CATALOG OF FEDERAL DOMESTIC ASSISTANCE NUMBER:** 93.838.
- 11. DESCRIPTIVE TITLE OF APPLICANT'S PROJECT:** Lung Diseases Research.
- 13. CONGRESSIONAL DISTRICT OF:** * Applicant UT-002.
- 14. PROJECT DIRECTOR/PRINCIPAL INVESTIGATOR CONTACT INFORMATION:**
 - Dr. Sam L Testpi
 - Position/Title: Professor
 - Organization Name: University of Utah

At the bottom of the form, there is a status indicator: "Error (0) / Warning (0) / Info (0)". A red box highlights this indicator, with an arrow pointing to the "Errors / Warnings / Info" text in the instructions above. To the right of the status indicator is a "Final Review" button, which is also highlighted with a red box and an arrow pointing to the "Final Review" text in the instructions above.

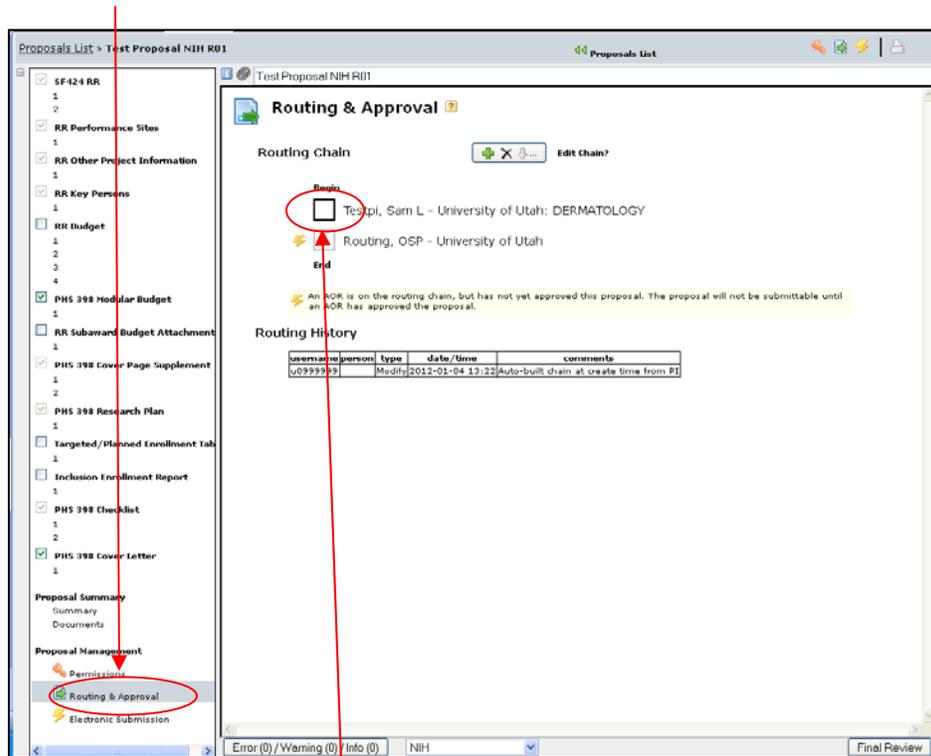
When the proposal is created, Cayuse 424 automatically builds a routing chain between the PI and OSP, as shown in the example below

- ❑ Do not edit the routing chain. Please contact OSP if you have any questions about the chain.



To approve a proposal and route it to OSP for review

- In the Proposal tab, the PI (or delegate) clicks the **Routing and Approval** link.

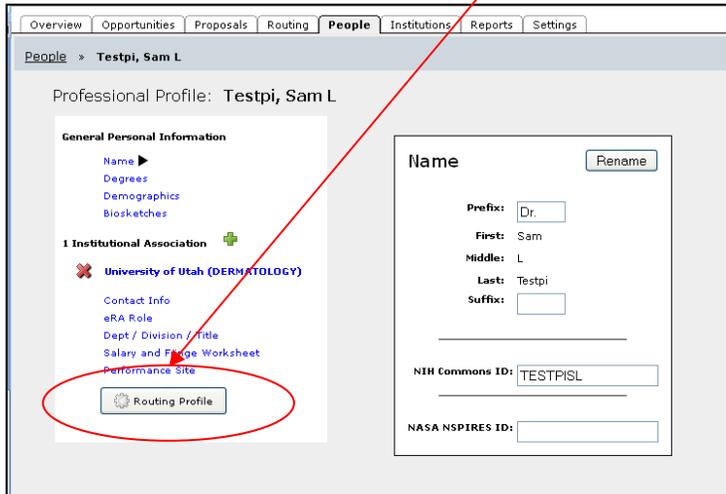


- Click the approval checkbox in the Routing Chain next to the PI name.
- In the **Action: Approve** dialog box that appears, enter any comments for OSP. Click **Approve**.

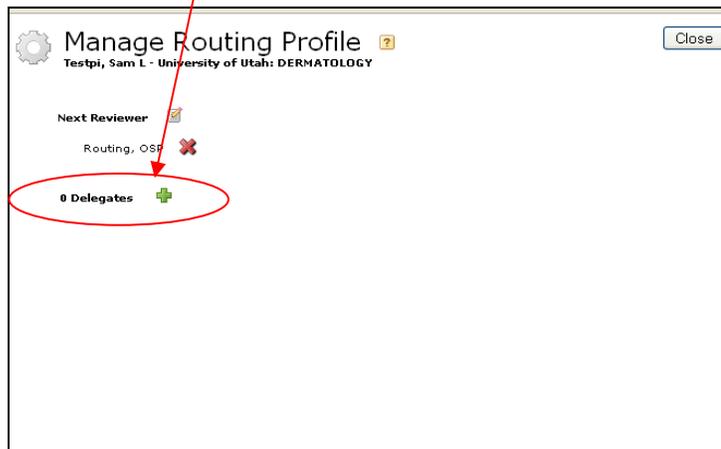
NOTE: If the approval box border is light gray (not checkable), you do not have authority to approve the proposal in Cayuse 424. If you are the PI, please contact OSP. If you are submitting on behalf of the PI, please contact the PI to have him/her log in to check the approval box or add you as an approval delegate (see next section).

Adding a PI approval delegate

- A PI can assign a delegate who can approve the proposal on that PI's behalf.
- To add a delegate, the PI clicks the **Routing Profile** button in his/her Professional Profile.



- Click the Add Delegates icon to open the **Add Routing Delegates** search window.



- Search for the delegate by name.
- Select the name from the Search Results window.
- Click **Add Delegates**, and the person's name will appear in PI's Delegate list. The PI's delegate has the authority to submit ALL proposals on the PI's behalf until the delegate authority is withdrawn by again editing the Routing Profile.

Once the PI (or delegate) has approved the proposal, it is now routed to OSP for review

- Cayuse 424 locks all data entry fields and the budget justification PDF(s) to further editing.
- You can continue to add/change all non-budget PDFs until OSP has performed its review and approved the proposal for submission. If you make changes to PDFs after the proposal has been locked, please inform your OSP officer.
- The PI can retract approval by clicking on the approval box next to his/her name to uncheck the box. This will unlock the proposal so it can be edited and will remove it from OSP's review queue.

OSP will perform its standard review

- If changes or corrections are necessary, OSP will route the proposal back to the PI. This will unlock the proposal so it can be edited.
 - Once corrections are complete, the PI will need to route the proposal back to OSP.
- Once the proposal is complete and ready for submission, route it back to OSP by checking the approval box.
- Once finalized, OSP will submit the proposal to Grants.gov/Research.gov.

You can check on the submission status once the proposal has been submitted to Grants.gov/Research.gov

- ❑ In the Proposal tab, click the **Electronic Submission** link.

The screenshot shows the 'Test Proposal NIH R01' page. The left sidebar contains a list of proposal sections, with 'Electronic Submission' highlighted in red. The main content area shows various form fields for project details, including agency name, budget, and contact information. A red arrow originates from the 'Electronic Submission' link in the sidebar and points to the 'Final Review' button at the bottom right of the page.

- ❑ The **Proposal Submission History** section shows the submission results.

The screenshot shows the 'Using Large Clinical Data Repository to Support Shared Decision Making' page. The 'Electronic Submission' status is displayed at the top. Below it, the 'Proposal Submission History' section is circled in red. It contains a table with the following data:

| S2S portal Tracking | Received Date/Time | Submitter | Message |
|-------------------------------|-------------------------|-----------|-------------------------------------|
| GRANT11034875 | 2012-01-12 13:45:21 PST | u0363733 | Successfully received by S2S portal |

Below the table, the 'Electronic Submission' section shows the 'Submission Target' as <https://ws07.grants.gov:446/app-s2s-server/services/ApplicantIntegrationSoapPort>.

- A lightning bolt icon  appears in the Proposals List next to the title to indicate that the proposal has been successfully submitted.
- Any funding agency (e.g., NIH, NSF) confirmation emails that are sent to the PI will continue to be sent as normal.

For additional assistance routing and submitting a proposal

- Contact your OSP Grants and Contracts Officer.
- Email cayuse@osp.utah.edu