

OSU-Cascades Tutorial on Cayuse Grant Submissions

Cayuse is an internal grant and contract system that facilitates communication and tracking across the PI, Sponsored Projects, and department/college “approvers.” Cayuse has an added feature of providing templates for the submission of grants to many federal agencies, saving the PI time and effort. It is not only important to submit all grants and contracts through Cayuse, it is required. If you submit a grant or contract outside of Cayuse you remove the opportunity to have budget errors caught in advance of submission, including incorrect assignment of Indirect Cost Return Rates. Input into Cayuse also ensures that your money will be tracked appropriately when received and credit for your efforts given to Cascades. When you start a proposal, you will be assigned a number. Your information will be saved as you go and you can continue to edit as you have the information prior to submission. Consider starting this process early. There are many screens that can be filled in prior to finalizing your grant, making the final submission less stressful.

To Start:

Items to have electronically before starting your proposal in Cayuse (hard copies may help in the input process):

- URL for request for proposals or download a copy of the request for proposals
- **Internal Grants/Contracts Routing Form** – complete with signatures as needed
- Ensure that the entire team completed and submitted their annual conflict of interest form
- Title and Abstract of project
- Start and end dates
- Budget
- Budget Justification
- Grant Narrative (Helpful for reviewers but not required until the grant is submitted, draft is acceptable)
- If there is a subcontractor, you will also need:
 - Statement of Work
 - Budget
 - Budget Justification
 - Letter from subcontractor signed by an authorized official

Please note: At the end of this document you will find links to the Research Office Just-in-Time Cayuse Support. Please refer to the documents to learn how to set up a Cayuse account and to get information on budgets.

To Access Cayuse: Go to <http://oregonstate.cayuse424.com> Enter your OSU login and password (lastF@oregonstate.edu)

At the Envisions Research Suite Site: Click on **Cayuse SP** Sponsored Projects link (not Cayuse 424)

- You will be brought to a home page. On the left hand Proposal Dashboard, click **Start New Proposal**.

Start New Proposal Page

- Complete the information on this page. All boxes with a * must be completed. Some you will fill in. Others will open a searchable drop down box. Cayuse will notify you if you do not enter a required

field after you select Save. You will not be allowed to advance until this basic information is submitted. (You can always edit for accuracy later in the process.)

- Funding Agency(ies)
 - *Funding Agency – click on box and type in name of funder (e.g. National Science Foundation), click search
 - If the organization comes up, click on name and it will autofill.
 - Funding Opportunity/Sponsor Application No: Fill in if appropriate.
 - Sponsor Program Name: Fill in if appropriate with the name of the specific competition (e.g. REESE).
 - Proposal Guideline URL: Cut and paste from announcement or attach a PDF of the RFP in the attachment section.
 - Prime Funding Agency: Generally the same as Funding Agency. Search or click on No Sponsor.
- General Proposal Information
 - *Short Project Name: Be descriptive.
 - *Project Start Date: Anticipate how long it will take for grant to be reviewed/awarded and select start date.
 - Use pull down menu to select year first, then month and day.
 - *Project End Date: Follow instructions of funder, then follow above steps.
 - Activity Code: Select from below:
 - This refers to the type of project activity for which funding is being requested. The Activity Code is selected from the pop-up window: Basic Research, Applied Research, Other Sponsored Activity, Research Training, or Development. This selection enables institutional research reporting and is the basis for determining the appropriate Facilities and Administrative (F&A or Indirect) Cost Rate.
 - **Basic Research** – Systematic study directed toward fuller knowledge of understanding of the subject. Basic research is specifically organized to produce identified outcomes.
 - **Applied Research** – Utilizes basic research outcomes or theories in practice; i.e., toward the production of new materials, devices or systems.
 - **Other Sponsored Activity** – Support of student services, educational resources, cooperative extension and outreach programs, community service partnerships, public service programs, etc.
 - **Research Training** – Activities where the primary objective is for development or extension of an individual’s research skills, techniques, and knowledge toward a career in research; fellowship or training projects where the students usually are not employees; there is usually an educational requirement as part of the fellowship or traineeship, including mentorship of postdocs.
 - **Development** – The systematic study of designing, developing, and evaluating instructional programs, processes, and prototypes or products that must meet certain criteria and consistency; especially important in the field of instructional technology.

See the OSU Research Office website for additional, related information:

<http://oregonstate.edu/research/osp/budget-fa-costs-indirect-costs>

- **Proposal Type:** Select from New, Pre-Proposal, Renewal, Continuation, or Supplement.
- **Instrument Type:** Select from: Grant, Cooperative Agreement, Contract, or Incoming Sub award.
- **How will Proposal be Submitted:** Select from: Cayuse 424, Grants.gov forms, FastLane, Sponsor website, Email, Paper, Other.
- ***Award Administration Department:** Click on search icon, go to 19XXXX series and select your department. All Cascades departments start with CC, meaning Cascades Campus (e.g. CC Computer Science).
- ***Primary Administrative Contact:** Click on search icon. Search for Lueck. Click on Kira Lueck.
- **Affiliated Departments and Centers if applicable:** Select other departments involved in project. There should be a discussion prior to submission to determine if other departments are anticipating a portion of the F&A (indirect cost) return. If this is a case, contact Kira or Julie about how to submit this information.
- ***Sponsor Deadline:** Use toggles and start with year, then month, then date. Enter time. Select time zone. Select postmark or receipt.
- **Previous Index Number:** Enter if applicable (i.e., if this is a resubmission of a previous grant entered into Cayuse).
- ***Title of Project:** Enter title. This should be descriptive and may be used in published reports on campus and elsewhere.
- **Paring a Proposal:** There are three choices: Create a Paired Proposal, Pair with a 424 Proposal, Un-Pair with 424 Proposal. A paired proposal means that you are completing the internal Cayuse document that supports internal routing and that you are simultaneously creating the “real” proposal that will be submitted to the funding agency. For instance, if you indicated that you are submitting an NSF grant and select Pair with a 424 Proposal, you will have a second set of documents appear that are the same as those that will be submitted to NSF. This will save you a significant amount of work. Not all grantors will have templates included so that you can pair a proposal. You can select none of these boxes or the one that best meets your needs. Questions? Talk to Sponsored Projects of Kira or Julie.
- **Click Save.** The system will open a new box on the left hand side that indicates a number of steps to be completed. As each step is successfully completed, a green check mark will appear next to the completed section. If the Starting a Proposal page has been completed correctly, a green check will appear next to General Information. You can then click on the other sections to advance. You do not have to complete the sections in order of appearance. If information has been omitted or entered incorrectly, a set of red warnings will appear on the top of the page. You will not be able to proceed until you clear those warnings.
- **Investigators/Research Team**
 - ***Personnel:** Search last name of PI. A window will open. Select the correct name and the information will auto-populate the remaining boxes. Save Personnel below.
 - ***Person Months** and ***Sponsored Effort %:** Note that this is a hyperlink to a worksheet that will calculate these values for you. Person Months: Enter months of effort over the life of the entire project. Sponsored Effort: the portion of entire project effort that will be paid by sponsor. For example, 1 month effort paid by the sponsor for each year of a three year project would equate to 8.3%, 3 months project effort/36 month project period = 8.3% Sponsored Effort. Fill in the two values from the worksheet.

- **Cost Shared Effort %** is also based on the effort over the entire life of the project. Cost share is time that you are dedicating to the project for which you are not being paid by the grant. Cost share is required by some grants and prohibited by others, so read your RFP carefully. Cost share, if used, must be internally tracked and validated so, when in doubt, do not include cost share unless required. Cost Shared Effort would use the same calculation as above.
 - **Allocation of Credit %**: Not Used by OSU at this time = leave blank.
 - Add Kira Lueck as a Proposal Editor: Person Months and Sponsored Effort should be zero.
 - **Click Save Personnel**.
 - If this was completed correctly, the information for the PI will appear in a chart form. You can edit or remove at this time. The **Add Personnel Information** box will now appear above. Add rest of team (if any). Review table for accuracy.
 - Advance to the next section.
- **Budget**
 - ***Budget Form**: select one of the below in the drop down screen.
 - Summary: View direct costs, indirect rates, bases and totals (default setting) (Best used when this is for internal purposes).
 - Detailed: View specific budget categories, indirect rates, bases and totals (best used if there is not the option to pair with 424 and you want to capture budget details).
 - Autofill: View detailed budget data auto-filled from 424 proposals, if paired. (A timesaver when paired with a 424 proposal.)
 - ***# of Budget Periods**: Typically, the number of years of grant (e.g. 3 year grant = 3 budget periods)
 - *** Current Period**: Enter first budget year of grant.
 - ***Start and End Date**: Select year first, then month and date. Refer to RFP. Stay consistent with Start New Proposal page.
 - ***Cost Sharing**: Click Yes or No.
 - **F&A Rates**: Click in box and select your approved F&A rate.
 - **Budget Categories**:
 - **Sponsor Direct Costs**: Total cost of what grant is paying out.
 - **Base for F&A Rate**: Of the total cost, what is F&A applied against. Some expenses (i.e., participant stipends, sub-awards over \$25,000) may not be eligible for F&A returns.
 - **Total Institutional Costs**: Calculates total amount that you will have to request from sponsor to cover F&A and stay within grant guidelines. This is calculated for you.
 - ***Additional Resources**: Click Yes or No.
 - Click **Save**.
 - Advance to next screen.
 - **Conflict of Interest**: Read questions and answer Yes or No.
 - 1st question-Did entire team complete annual conflict of interest form?
 - 2nd question-Financial interests for personal or business reasons.
 - Click **Save**.
 - Advance to next screen.
 - **Regulatory Compliance**: Mark Yes or No for Human Subjects, Animal Subjects, and Research Materials
 - Click **Save**.
 - Advance to next screen.

- **Sub awards/Subcontracts:** If sub awards, add in name. If not, click No Subcontracts.
 - For subcontracts that are funded, you need to provide the following:
 - Statement of Work
 - Budget
 - Budget Justification
 - Letter from subcontractor signed by an authorized official
 - Advance to next screen.

- **Export Control:** Check boxes as they apply and click **Save**.
 - Advance to next screen.

- **Intellectual Property:** Check boxes as they apply and click **Save**.
 - Advance to next screen.

- **Outreach and Engagement:** Allocate proportion of funds requested for this project across the three principal missions of the University. The total must equal 100%. Some categories may be 0%. All categories must have a number entered into them.
 - Research and Discovery
 - Teaching and Learning
 - Outreach and Engagement
 - Click **Save**.
 - Advance to next screen.

- **Location of Sponsored Activities:** Indicate locations where work will occur:
 - On-campus
 - In-State County Locations
 - Out-of-State Locations
 - Out-of-Country Locations
 - Total must equal 100%. Percentages should reflect the portion of total budget that will be expended in that location.
 - Enter location and % of work and click Add. The number for that section will show below. The total must equal 100% to advance.
 - Advance to next screen.

- ***Proposal Abstract:** This is an internal Abstract for OSU. It should contain: purpose, hypothesis and method of project. You have the option to make it accessible to the public or not. Give ***Permission** or not. Cut and paste abstract into the box.
 - ***CIP Codes:** Select CIP code from pull down screen. Select category closest to your field of study. If none match, select Other.
 - Click **Save**.
 - Advance to next screen.

- **Proposal Attachments:** Browse to find file. Select document type (e.g. Abstract, Application Package, Bio Sketch, Budget, Budget Justification, Cost Share Commitment Letter, F&A Waiver, Subcontractor Materials). Click Add. Be sure to include the **Internal Grant/Contract Routing Form**.
 - Documents that are uploaded are available to viewing by the Cascades Approvers and to Sponsored Projects.

- Advance to next screen.
- **Approving Departments:** Automatically populated based on prior information (award department, affiliated departments, PI). Double check and authorize department listing.
 - Advance to next screen.
- **Submission Notes:** Add additional notes.
- **Click Submit for Routing:** Goes to Cascades personnel for approval, then to OSRAA. As proposal is approved, you will be emailed a notice concerning where it is in the process.

A proposal number is generated as soon as you complete the Start a Proposal page. You can go back and edit the document at any time. There is a PDF icon next to number; click on it to get a PDF of what you entered.

Go to My Dashboard, and go to My Proposals to view/edit open proposals.

Just-In-Time Cayuse Support

Cayuse Support (<http://research.oregonstate.edu/osp/just-time-cayuse-support>)

In May 2011, OSU began using Cayuse 424 as its web-based proposal development and submission system. The following year, OSU implemented Cayuse SP, which is used as OSU's web-based internal proposal routing and approval system. Below you will find links and other documents that will help provide additional information on the use of both products.

Questions can always be addressed to sponsored.programs@oregonstate.edu by e-mail or by phone at 541-737-4933.

To get started, here are some quick tips:

1. The Cayuse Research Suite URL: <http://oregonstate.cayuse424.com>. User name and password are your ONID username and password.
2. Users must be registered within the Cayuse system prior to initial use. Registration request form: </office-sponsored-programs/webform/cayuse-new-user-registration-request-form>
3. Firefox is the best browser to use, but Internet Explorer also works. Cayuse does not work with Chrome and Approvals will not work with Safari. Full configuration details may be found here: <http://support.cayuse.com/docs/browser-support-configuration>. If you have accessed Cayuse before, you may need to "clear your history" following any changes.
4. Pre-proposals do not need to be routed through Cayuse. The Cayuse process will need to be utilized for submission of a full proposal and is initiated in the Cayuse SP module.
5. When logging into Cayuse, you'll see the following screen where you will select "Cayuse SP":



Logged in as: [redacted] [Log out](#)

Evisions Research Suite

3.2

Please start all proposals in Cayuse SP for institutional proposal routing and submission to Sponsored Programs for review.

Cayuse 424 is only used in conjunction with Cayuse SP for certain federal proposal submissions.

Please send an e-mail to sponsored.programs@oregonstate.edu or call 541-737-4933 if you have questions.

Research Administration Modules

[Cayuse SP \(Sponsored Projects\)](#)

[Cayuse 424](#)

System Administration Applications

[Backbone](#)

[Research Contacts](#)

[Workflow](#)

Application Help

[Research Suite Support Center](#)

[Browser Support & Configuration](#)

Other Supports found on the Cayuse Support page:

New Cayuse 3.0 Update Guidance

- [Cayuse 3.0 FAQ](#)
- [Cayuse SP Budget Summary](#)
- [Cayuse SP Budget Detailed](#)
- [Cayuse SP Budget 424 Autofill](#)
- [Cayuse SP General Info](#)
- [Cayuse SP Investigators - Research Team](#)