

CAYUSE External FUNDING

END USER GUIDE



STEPHEN F. AUSTIN STATE UNIVERSITY
OFFICE OF RESEARCH & GRADUATE STUDIES

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WHAT IS CAYUSE?

Cayuse is cloud-based software that provides an integrated suite of electronic grant and research administration products. Cayuse replaced the paper process for grant proposals as of 9/1/2022. SFA utilizes 2 (two) modules within Cayuse for external grant proposals - Sponsored Projects (SP) and Proposals (S2S).

Cayuse Sponsored Projects (SP)

- A cloud-based application that replaced paper processes for grant proposals as the University-wide grants management solution.
- SP includes electronic proposal initiation and development, proposal routing and review, budget building, award initiation and tracking.
- Offers smart form technology with conditional logic to show only the questions needed for the proposal type.
- Provides a centralized at-a-glance dashboard based on user roles.



Cayuse Proposals (S2S)

- A cloud-based application utilized to simplify the creation, review, approval and electronic submission of **Grants.gov proposal applications** through a secure and direct connection.
- Delivers an advanced validation engine that cuts development time, eliminates rework and improves first-time submission success
- Performs real-time error checking based on agency and opportunity-specific rules, Grants.gov validations and other business rules
- Maintains a complete repository and history of your proposals with access to quickly sort and filter proposals, copy them, and transform them to different opportunities.

Important Notes

- First step is to contact the ORGS Office. The grants team will inform you of the required items for the specific proposal you will create.
 - morehousbj@sfasu.edu or grants@sfasu.edu
 - 936-468-6606
- Preferred Internet Browsers: Google Chrome and Firefox
- Cayuse requires the use of pop-ups when utilizing Cayuse Proposals (S2S)
- Cayuse automatically saves after each change in the form
- Cayuse and ORGS make frequent updates to the system. Please note that screenshots and fields may be slightly different.
- Before you click “Route for Review” be sure your proposal is complete and all information is correct. You will not be able to make changes once the proposal has been routed.
- Check your attachments before submitting. Cayuse does not allow deletions.
- If you need to attach a new version of a previously attached document, add either a date or a version to the document name. For example, Budget Justification_5.31.2023 or Budget Justification v. 2.

Icons & What They Mean

- * - A red asterisk indicates a required field
-  - A red circle with a number next to a section indicates the number of incomplete required fields
-  - A green check mark next to a section indicates all required fields are complete for that section

RESOURCES

A. ORGS User Guides

Access via the ORGS website: <https://www.sfasu.edu/academics/orgs/grants-sponsored-programs/cayuse>

1. Internal Funding: Instructions for submitting internal grant proposals to ORGS.
2. External Funding: Overall instructions for submitting external proposal in Cayuse. All external proposals must be routed in Cayuse and approved by appropriate university personnel prior to submission. Anyone who intends to submit an external grant should contact ORGS prior to starting a Cayuse record as each external proposal is unique.
3. Departmental Administrative Staff: Instructions for viewing proposals, awards, and tasks. Allows for monitoring of proposals and awards.

B. SFA Knowledge Base

Access through the SFA IT Help Desk: <https://help.sfasu.edu/TDClient/2027/Portal/Home/>

1. Sign in (upper right-hand corner)
2. Select **Knowledge Base** on menu
3. Scroll down to **Cayuse**
4. **End User Guides**
5. **Cayuse FAQ**

C. Cayuse Resource Center

Access on every screen via the orange question mark in bottom right side.



1. Announcements
 - i) Will contain a link to the latest Cayuse update
 - ii) Link to Connect Community (more for grant administrators)
2. Show me how to (onboarding guides). *Coming soon*
 - i) Coming soon - Cayuse Academy
 - ii) Click Register. Then "Staff"
3. Help Center (articles and guides). *Coming soon*

PROPOSAL BASICS AT SFA

- Before starting a proposal in Cayuse, contact [ORGS](#) and review the [ORGS](#) website for current grant procedures.
- All grant proposals and contract budgets must be reviewed by ORGS *before* submitted to a sponsor for consideration. This will help to ensure that they meet SFA and sponsor requirements

Deadlines

- ORGS requires all internal approvals be obtained at least 5 business days prior to submission to ensure that ORGS has available staff to prepare the final proposal package and submit.
- This deadline may be earlier for competitive proposals or new sponsors.

Federal proposals

Some federal proposals will be submitted using the Proposals S2S module in Cayuse. Contact ORGS to determine which module to use.

Relevant grant policies, procedures, and resources

All SFA policies and procedures apply to all sponsored programs. The following links are useful when developing grant proposals:

- [ORGS](#) website
- [Who is eligible to apply for grants?](#)
- [SFASU Handbook of Operating Procedures](#)
- Refer to Procurement, Human Resources, and other departments for their specific policies and procedures

Standard proposal information

Need the current F&A rate? Unsure of what fringe benefit rate to use? Need to know the official SFA address to use on grants? ORGS maintains this standard proposal information on the website.

Other forms

Additional SFA or ORGS forms may be required if any of the below apply to your proposal. Contact ORGS for more information and review the [ORGS Forms](#) page.

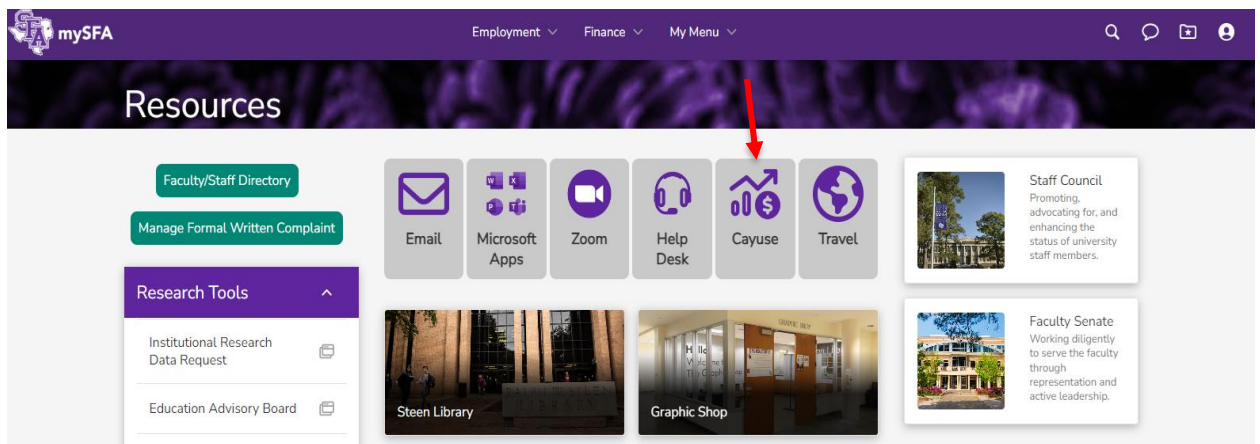
- If requesting a lower F&A rate than allowed by the sponsor
- If proposal includes match or cost share
- If you disclose a conflict of interest
- If your proposal includes a subaward
- If proposal includes foreign travel

ACCESSING CAYUSE

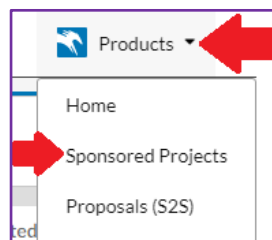
1. **Login to mySFA** using your mySFA username and password.

The image shows a login form titled 'Login'. It has a lock icon and the text 'Enter your MySFA Username and Password'. There are two input fields: 'Username:' and 'Password:'. Below the fields is a green 'Login' button.

2. Under Resources, select Cayuse at the top



3. Select **Products**, then click **Sponsored Projects** in the drop-down menu



CAYUSE LANDING PAGE / HOME PAGE

Once you are logged into Cayuse, the first page is the Cayuse **Landing Page**, also known as your **Home** page.

From this page, you can access all products that SFASU subscribes to and your outstanding tasks.

1. The **Products** drop-down menu allows you to access all currently subscribed to products. Select the appropriate menu item to continue to that product.
 - a. Home – the landing page
 - b. Sponsored Projects (SP) – for all internal and external proposals and awards (except proposals for Grants.gov)
 - c. Proposals (S2S) – for any federal proposal to be submitted via Grants.gov
 - d. Fund Manager – coming soon!
 - e. Human Ethics – coming soon!
 - f. Admin – for ORGS use only

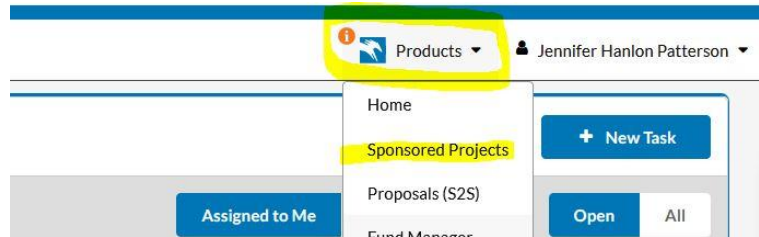
Task	Task Type	From	Assigned To	Created	Last Activity	Due	Status
Update budget	Ad Hoc Task	Me	Me	04/10/2024	04/10/2024		
Review Proposal for Mgt Mkg and Intl Business - 22-0269-P0001	Other			08/31/2022	04/10/2024		Open
Certify Proposal - 22-0252-P0001	Other		Me	08/16/2022	04/10/2024		Open
Certify Proposal - 22-0102-P0001	Other		Me	04/26/2022	04/10/2024		Open

2. **My Tasks** list all items pending your action. Click on the title to open.
 - a. **From** will designate who assigned you the task.
 - b. **Due** date will only populate if the assigner created.
3. To return to your **Home** page from any Cayuse product, select **Home** from the Products menu.

SPONSORED PROJECTS (SP) DASHBOARD

Your **SP Dashboard** allows you to access Proposals, Awards, and Reports (see separate instructions for Awards and Reports).

To access, in top right corner beside your name, select **Products**, then click **Sponsored Projects (SP)** in the drop-down menu



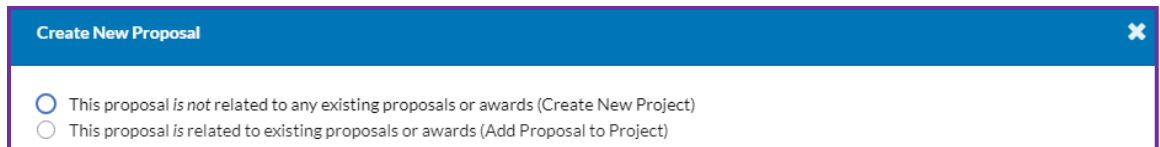
Dashboard

Project Title	Proposal #	PI	Status	Sponsor	Prime Sponsor	Admin Unit	Project Start Date	Project End Date	Proposal Type	Instrument Type
Beta Internal Publication Support	22-0138-P0001	Irene Investigator	Under Review	SFA Internal (SFA INTERNAL)	--	Forestry	6/1/2022	8/1/2022	Internal	Internal
Beta Internal Project Support	22-0137-P0001	Irene Investigator	Under Review	SFA Internal (SFA INTERNAL)	--	Kinesiology and Health Science	6/1/2022	7/31/2022	Internal	Internal
Beta Internal Travel	22-0136-P0001	Irene Investigator	Under Review	SFA Internal (SFA INTERNAL)	--	Social Work	6/22/2022	6/25/2022	Internal	Internal
Beta Test - Internal	22-0135-P0001	--	In Development	--	--	--	--	--	Internal	--
Beta Testing	22-0131-P0001	Irene Investigator	Approved	National Science Foundation (NSF)	--	Biology	6/9/2022	6/10/2022	New Proposal or Application	Grant (G)
Sample_06.08.2022_TK1	22-0130-P0001	--	In Development	--	--	--	--	--	New Proposal or Application	--

1. Status boxes: proposals fall into 7 different status categories (red square in image above).
 - a. **View** proposals assigned to a specific status by clicking on the desired status box. Proposals matching your selection will be displayed in the columns below the boxes.
 - b. List view of proposals based on assigned roles (red star in image above). You will only see proposals you initial or those you are authorized to access.
2. Proposal Status categories:
 - a. **In development** - user has begun a proposal
 - b. **Under review** - proposal has been routed for review
 - c. **Approved** - ORGS has approved proposal and it is ready to submit
 - d. **Submitted to sponsor** - Proposal has been submitted to sponsor
 - e. **Under consideration** - SFASU has been notified a proposal is under review by the sponsor or an award will be made
 - f. **Funded** - SFASU has received official award notice from sponsor
 - g. **Closed** - Proposal closed either due to being funded or not funded
3. Start a new proposal (red arrow in image above)

CREATE AN EXTERNAL PROPOSAL

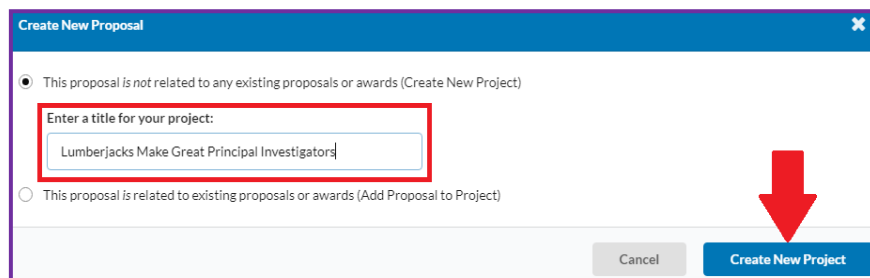
1. To begin entering a proposal, click **+ Start New Proposal** from your SP Dashboard.
2. A pop-up will appear with two options:
 - a. **This proposal is not related to any existing proposals or awards (Create New Project)**
 - b. **This proposal is related to existing proposals or awards (Add Proposal to Project)**



3. Create New Project

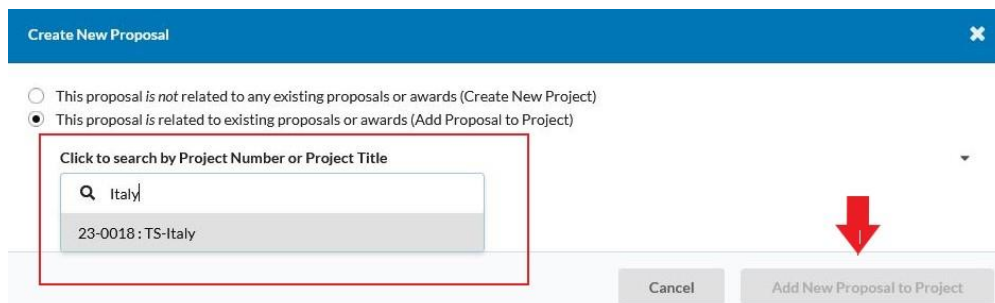
- a. In the pop-up box, **enter the title** for your project, then select **Create New Project**
- b. Title should describe your project. The title should not be the name of the sponsor or the name of the sponsor competition.

This title cannot be changed, so please ensure everything is correct before selecting "Create New Project"



4. Create a Proposal Related to Existing Cayuse Proposal or Award

- a. In the pop-up box, **enter** either the existing proposal/award Cayuse record number or the name of the existing project.
- b. **Select** the existing record once it populates then select **Add new Proposal to Project**



5. The **Proposal Form Interface** opens in the same window. Each question is based on conditional logic which means how you answer one question determines the subsequent question. This is an overview of the Form. The next sections will detail how to complete each section.
 - a. **Proposal Information:** Title, Proposal Number
 - b. **My Actions:**
 - i. **Route for Review** button activates once each section beneath Proposal Sections has a green check mark.
 - ii. If the user has permissions to complete the review, the **Complete Review** button activates.
 - c. **Proposal Summary:** Proposal summary information based on information entered
 - d. **Proposal Related Tabs:** Provide additional information to follow the tracking of the proposal and to include additional items to your proposal such as Attachments, Links, and Tasks
 - e. **Proposal Sections:** Contains required proposal sections based on conditional logic
 - i. The red number indicates the number of incomplete required fields
 - ii. A green check indicates the section is complete
 - f. **Proposal Form:** Users complete proposal information based on selections within the form.

The screenshot displays the 'Proposal Form' interface for a project titled 'Lumberjacks Make Great Principal Investigators'. The interface is divided into several sections:

- A) Header:** Shows the project title and a link to 'My Active Projects'.
- B) My Actions:** Contains two buttons: 'Complete Review' and 'Route for Review'.
- C) Proposal Summary:** Displays summary information including PI, Admin Unit, Sponsor, Prime Sponsor, Sponsor Deadline, Total Sponsor Costs, Project Start Date, Project End Date, Instrument Type, and Project ID (22-0132).
- D) Tabs:** A horizontal menu with tabs for 'Proposal Form', 'Routing', 'History', 'Access', 'Tasks', 'Notes', 'Attachments', and 'Links'.
- E) Proposal Sections:** A vertical list of sections with red numbers indicating incomplete fields: Proposal Information (11), Personnel (4), Sponsor Information (1), Conflicts Of Interest Disclosure Process (3), Research Subjects (3), Research Materials (1), and Export Control (10).
- F) Proposal Information:** The main form area with fields for 'Proposal Type*', 'Project Title*', 'SFA Department Managing Award*', and 'SFA Primary Contact That Will Manage This Project If Awarded*'. Red error messages are visible: 'For internal grants, select "Internal"' and 'Field must not be empty'.

PROPOSAL SECTIONS

Each section is based on conditional logic based on your responses, so you may have different fields to complete depending upon your responses.

Basic steps

1. Complete all required fields for each Proposal Section
 - a. Required fields are indicated with a **red asterisk ***
 - b. Important notes or helpful information is provided in **purple text** throughout the Proposal Form
2. Once all required fields are completed, select **Route for Review** in the **My Actions** section to start the automated routing process
 - a. Red exclamation marks indicate a section that has not been started
 - b. Red numbers indicate the number of questions in that section that still need answered.
 - c. Green checkmarks indicate the section is complete.

Incomplete Proposal

Proposal Sections	
Proposal Information	✓
Personnel	!
Sponsor Information	!
Conflicts Of Interest Disclosure Process	!
Research Subjects	!
Budget	!
Research Materials	!
Subawards & Subrecipients	!
Export Control	!
Proposal Abstract	!
Attachments & Submission Notes	!

Complete Proposal

Proposal Sections	
Proposal Information	✓
Personnel	✓
Sponsor Information	✓
Conflicts Of Interest Disclosure Process	✓
Research Subjects	✓
Research Materials	✓
Internal Budget	✓
Export Control	✓
Project Support	✓

A. Proposal Information

1. **Proposal Types.** Select one of the following:

- i. New Proposal or Application – new proposal not related to another Cayuse record. Use if SFA is the sole applicant or the lead applicant on a collaborative proposal.
- ii. Collaborative Application (SFA not lead) – use for a collaborative proposal with an outside entity as the lead applicant.
- iii. Continuation/Renewal – use to connect a new proposal to a previous award in Cayuse. This requires selection of **Create a Proposal Related to Existing Cayuse Proposal or Award** in previous step.
- iv. Contract or Award – no proposal was submitted but an award/contract has been received.
- v. Internal – DO NOT SELECT. Solely for internal grants.
- vi. Non-Competing Continuation/Progress Report – use for a continuing project and the new proposal is not competitively funded. This requires selection of **Create a Proposal Related to Existing Cayuse Proposal or Award** in previous step.
- vii. Pre-Proposal/Letter of Intent – use when the sponsor states the proposal is a pre-proposal or letter of intent
- viii. Resubmission – new proposal for a previously submitted proposal that was not funded.
- ix. Revision – select to create a proposal that revises a previously submitted Cayuse record. This requires selection of **Create a Proposal Related to Existing Cayuse Proposal or Award** in previous step.
- x. Supplement – currently not used
- xi. 501(c)(3) SFA Foundation Submission Required – new proposal that must be submitted by the Office of Development.

2. **Proposal Submission Method**

ORGS is the authorized university entity responsible for submitting all proposals. ORGS may approve faculty/staff to submit proposals based on submission method.

- i. Email
- ii. Era Commons – only for NEH proposals
- iii. Paper (regular mail) – it is the PI's responsibility to mail the proposal once all university and ORGS approvals have been obtained.
- iv. Proposals (S2S) – proposals that will be submitted via Grants.gov. Refer to the **Creating a New Proposal (S2S) Record** for more details.
- v. Research.gov/Fastlane –all NSF proposals
- vi. Sponsor website –proposals that must be submitted via a sponsor portal
- vii. Other – detail in the pop-up box

3. **Project Title** - Complete title of project
4. **Preferred Banner File Name** - Anticipated shortened name
5. **SFA Department Managing Award**
 - i. Select the department that will manage this award.
 - ii. Select only one unit.
6. **SFA Primary Contact that will manage this project if awarded**
 - i. Select the primary contact – may be the PI, administrative staff, etc.
 - ii. Select only one contact.
7. **Collaborative Unit(s) If Applicable**
 - i. Select other SFA units that are part of the project.
 - ii. May select multiple units.
 - iii. Note: The drop-down selection is populated by Banner. Only select the formal unit's name and ignore other entries. For example, "Agriculture" is the correct formal unit's name and not "Agriculture Rodewald"
8. **Project Start and Project End Date** - Enter anticipated dates. If awarded, the award will be setup according to the sponsor's approved start and end dates.
9. **Anticipated Award Instrument**
 - i. Contract
 - ii. Grant
 - iii. Internal - DO NOT SELECT. Solely for internal grants
 - iv. Subaward

Note: if unknown, select Grant.
10. **Will funds be awarded to SFA or will SFA provide match/cost share**
 - i. Select 'No' if project includes no funds from the sponsor and no SFA commitments to provide staff, goods, services, etc.
 - ii. Select 'Yes' if sponsor will provide funds to SFA and/or SFA is committing funds or services as match/cost share. This option will populate a Budget section for completion.
11. **Activity Code** - Select the most appropriate activity code from the list provided in Cayuse. If the proposal is awarded, this code is used in Banner to designate the nature of the work
12. **Institutional Considerations**

The answer to each question will determine if subsequent approvals/information are required.

 - i. Alterations to space or new construction – also includes any new outdoor spaces.

PI/PD must attach approval from either the Design Center and/or appropriate Dean and VP.

- ii. Maintain equipment or activities after project ends – including annual service or maintenance agreements, annual reports, etc.

PI/PD must attach approval from a chair, dean, or director who will commit to providing the funds to maintain equipment, to provide staff to complete reports, etc.

- iii. Hire additional faculty or professional staff – only if *new* positions will be created.
 1. PI/PD must contact HR.
 2. If new job description will be required, upload either document or email from HR stating that they will work with PI/PD if the grant is awarded.
 3. Can also use current grant-related job description templates. Contact ORGS grants team.

PI/PD must attach job description from HR or an email from HR stating the salary range for the new position.

- iv. Create new certificate or degree or create a new center or institute.
 1. PI/PD must receive approvals as required by SFA.
 2. For new certificate or degree programs, approval is required from multiple units.

PI/PD must attach job description from HR or an email from HR stating the salary range for the new position.

B. Personnel

Read definitions detailed in Cayuse. If exact role is not listed, select the most appropriate role.

1. **Required** – designate one person as the PI.
 - i. Main person who will manage the project.
 - ii. This will also populate the person's name in the summary section.
2. Not required – all other roles
3. Internal Association – select the appropriate unit. Click in the space and the individual's department should automatically populate (based on Banner).
4. Select PI/co-PIs supervising department or college
5. Will faculty be provided reduction in course load or responsibilities as a result of this project being funded?
 - i. If 'Yes' then specify the name(s) of the faculty and if the sponsor is providing funds.
 - ii. Contact ORGS for assistance with figures required for the budget.

C. Sponsor Information

If sponsor is not listed in the drop-down menu, send the following information to cayuse@sfasu.edu:

Funding Agency Name
Funding Agency Website
Funding Agency Contact (if known)

1. Deadline – date proposal is due to the sponsor.
ORGS requires that all internal approval are obtained at least 5 business days prior to submission in order to ensure ORGS will have available staff to prepare final proposal package and submit.
2. Funding Agency – the entity that will directly give SFA the award
3. Prime Funding Agency – the parent entity or original source of funds. The prime awards funds to the Funding Agency who then awards funds to SFA.
4. Is either agency federal?
5. Funding Opportunity Announcement
6. Funding contact

D. Conflicts of Interest Disclosure Process

1. PI answers the questions in Cayuse
2. Each PI/PD/Key Personnel completes the separate disclosure form and submits to ORGS (this is a Microsoft Forms document)

E. Research Subjects

1. Follow prompts and answer all required questions.
2. Contact IRB or IACUC Chair as appropriate or ORGS Compliance Coordinator with any questions.
3. Most sponsors only require IRB or IACUC approval prior to start date of project.

F. Budget

IMPORTANT: Use the ORGS internal budget spreadsheet to create and obtain approval from ORGS prior to entering your budget into Cayuse.

Round all figures to the nearest dollar.

1. Project start and Project end dates – Enter estimated dates
2. Amount Requested from Sponsor
 - i. Direct Cost - planned expenses that are directly tied to your project
 - ii. Indirect Cost -also called overhead or facilities & administrative costs
 - iii. Total Sponsor Cost – total of direct and indirect
3. Required SFA Cost Share/Match – Only include if sponsor has a written cost-sharing requirement in the Request for Proposals or other formal sponsor policy or regulation.
4. Total Project Cost

G. Research Materials

1. Follow prompts and answer all required questions.
2. Contact IBC Chair as appropriate or ORGS Compliance Coordinator with any questions.
3. Most sponsors only require IBC approval prior to start date of project.

H. Subawards & Subrecipients

1. Follow prompts and answer all required questions.
2. Subawards – SFA is partnering with another institution who will be responsible for managing the project.
 - i. Contact ORGS immediately
 - ii. The subaward entity must complete a separate form prior to proposal submission.
 - iii. Attachments required as specified in Cayuse.
 - iv. Subawards must be listed in the sponsor budget as “subawards”.
 - v. Subawards can only be institutions and not individuals.
 - vi. If awarded, SFA must execute a subaward agreement with the external entity prior to any work being performed.
3. Subcontractors
 - i. Individual contractors are not usually named in a sponsor budget.
 - ii. Include a line for each type of contract in the sponsor budget as applicable.
 - iii. If awarded, SFA must execute contracts with each subcontractor prior to any work being performed.

I. Export Control

Review the [Export Control section](#) of ORGS's website to determine if this section applies to your project.

J. Proposal Abstract

Follow instructions in Cayuse. Abstracts are used for reporting purposes and to publicize awards.

K. Attachments & Submission Notes

Only upload final versions of documents as attachments **cannot be deleted**.

Contact ORGS to determine what documents are required as not all sponsor-related documents will be included in Cayuse.

FEDERAL PROPOSALS IN GRANTS.GOV

Federal proposals that can be submitted through Grants.gov use a separate module in Cayuse. The Proposal S2S module will submit directly to Grants.gov.

Creating a New Proposal (S2S) Record


1. To link a Grants.gov opportunity to a proposal, select **Proposals (S2S)** in the **Proposal Submission Method** drop-down menu:
 - a. If the Grants.gov proposal exists, use the **Search by Proposal Name** feature and select the appropriate record
 - b. If the Grants.gov proposal does not yet exist, click **Create New Proposal (S2S) Record**

Proposal Information


Proposal Type* X ▼
For internal grants, select "Internal"

Proposal Submission Method* X ▼

Link to Proposals(S2S) Record

Create New Proposal(S2S) Record 


OR

Search by proposal name... ▼ 

No records have been selected yet.

2. After selecting **Create New Proposal (S2S) Record**, a pop-up will appear asking for the proposal type. Select the proposal type, then click **Create**.

- a. Grants.gov
 - i. Use for electronic submission to a federal sponsor when SFA is the prime institution
 - ii. *Most common selection within Proposals S2S*
- b. Other Proposal
 - iii. Use to obtain Federal forms that are not being submitted electronically
 - iv. *Minimally used selection within Proposals S2S*
- c. Research Subaward Proposal
 - v. Use to create a subaward to send to another institution
- d. Training Subaward Proposal
 - vi. Use to develop a training budget to send to another institution
 - vii. *Minimally used selection within Proposals S2S*

 **Create Proposal**

Grants.gov
Proposals for federal opportunities downloaded from and submittable to Grants.gov.

Other Proposal
Other proposal formats not electronically submitted to Grants.gov, including other federal proposals, or opportunities from non-federal sponsors. Also includes internal opportunities.

Research Subaward Proposal
Subaward proposal for internal use or for sending to other Proposals (S2S) sites; uses the 424 RR Budget.

Training Subaward Proposal
Subaward proposal for internal use or for sending to other Proposals (S2S) sites; uses the PHS 398 Training Budget.

3. Utilize the search functionality to browse the Opportunity List. To select the opportunity, click the **green plus sign** next to the Opportunity Number to create the connection to Grants.gov

Create Grants.gov Proposal...

Filter Find More Download Opportunities Show Closed Opportunities

25 Page 1 of 3 Displaying 1 to 25 of 70 items

Opportunity N Title	Comp. ID	Comp. Title	Agency	CFD Pack	Opens	Closes	Downloaded
FA9550- AFOSR TEST BAA	RTA2-1	Computational	Air Force Office c	12.8t	PKG00 01-25-2022	07-31-2022	06-10-2022
FA9550- AFOSR TEST BAA	RTA2-3	Dynamical Syst	Air Force Office c	12.8t	PKG00 01-01-2022	07-31-2022	06-10-2022
PA-GO-k G-p. Training and NIH Ext	FORMS-G	Use for due dat	National Institut	93.8t	PKG00 08-13-2021	08-12-2025	06-10-2022
PA-GO-T G-p. Training and NIH Ext	FORMS-G	FORMS-G	National Institut	93.8t	PKG00 11-14-2019	11-12-2023	06-10-2022
PA-FN-R G-p. Training and NIH Ext	FORMS-G	FORMS-G	National Institut	93.8t	PKG00 08-13-2021	08-12-2024	06-10-2022
PAR-FO- G.G. Training & NIH ext U.			National Institut	93.8t	PKG00 06-25-2021	07-01-2022	06-10-2022
PA-FO-D G-p. Training and NIH Ext			National Institut	93.8t	PKG00 06-23-2021	07-01-2023	06-10-2022

4. In the pop-up window, enter in all fields, then click **Create Proposal**
 - a. Ensure the short proposal name is accurate
 - b. Enter the Lead PI (Principal Investigator) by using the “Search for PI” field
 - c. Select the appropriate IDC (Indirect Cost Rate)
 - d. Enter the # of budget periods you will be requesting
 - e. Ensure the due date is correct and select a validation type (select the sponsor)

Create Grants.gov Proposal

Opportunity: FA9550-22-S-0001-TEST Select A Different Opportunity

Proposal Name: Test for SFA

Irene Investigator Search for PI

Principal Investigator: Investigator, Irene / Stephen F. Austin State University

Organization: Stephen F. Austin State University

Default IDC Rate: MTDC : DOE

of Budget periods: 1 2 3 4 5

Due Date: 06/10/2022

Validation Type: Other Federal Agency

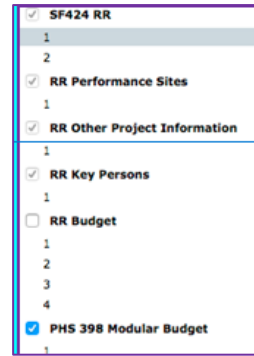
Create Proposal Cancel

5. Enter information as required. All proposals have different requirements, so there are not specific screenshots included in this manual. You need to respond to each section.

[Contact ORGS for assistance.](#)

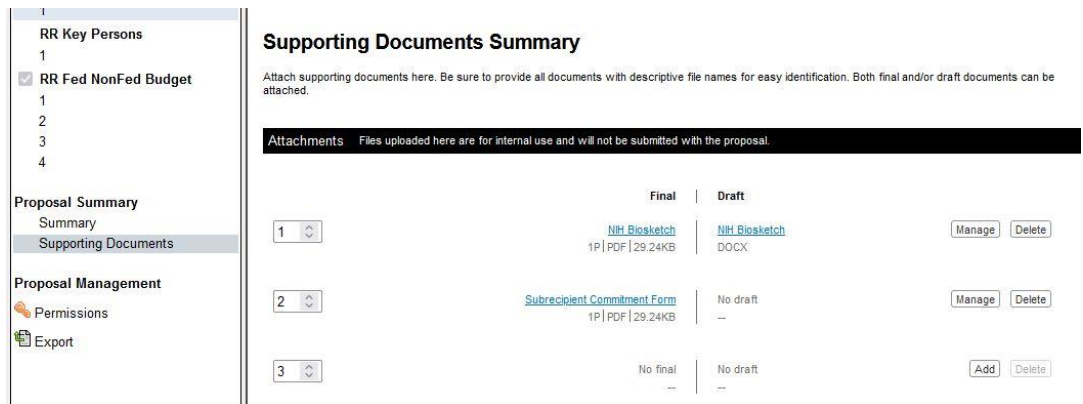
6. Navigating through the proposal.

- a. In order to “scroll” through the proposal package, use the navigation bar on the left of the screen



- b. Additional forms required.

- i. Review the Opportunity Announcement and sponsor website to determine the forms required.
 - ii. Review the ‘Supporting Documents’ section under **Proposal Summary**.



- c. **IMPORTANT:** Use the ORGS internal budget spreadsheet to create and obtain approval from ORGS prior to entering your budget into Proposals (S2S).
- d. Use the error and warning check feature at the bottom of the page to ensure you have completed all parts of the package accurately. In the screenshot below, there are 64 errors and 4 warnings.



- i. Click on the box to view the errors/warnings/info items
 - ii. Hyperlinks will take you directly to the form with the error.

- iii. Work through each item until there are no further errors.

Error (64) / Warning (4) / Info (1) NIH

Error: [SF424rr 1.1] One of the **Type of Submission** radio buttons must be selected

Error: [SF424rr 1.5] A **First Name** for the contact person of the Applicant Information must be provided

Error: [SF424rr 1.5] A **Last Name** for the contact person of the Applicant Information must be provided

Error: [SF424rr 1.5] A **Position/Title** for the contact person of the Applicant Information must be provided

Error: [SF424rr 1.5] A **Street1** street address for the contact person of the Applicant Information must be provided

- **Errors** must be corrected before the proposal can be submitted.
- **Warnings** are cautions and do not have to be corrected.

7. Once all errors have been resolved, contact ORGS who will perform the 'Final Review' with you.

Error (0) / Warning (0) / Info (0) NIH

Final Review

8. Return to Cayuse SP and complete the proposal.
9. Route for review.
10. Notify ORGS when your package is ready to be submitted.

ROUTING/APPROVAL PROCESS

Once you have completed your proposal (signified by all green checks on the proposal information sections), then you submit the proposal for university review.

- SFASU requires that all proposals receive ORGS review and approval prior to submission.
- Each approval team may have multiple persons listed who can approve. However, only one person is required to approve. Once the person approves, any others in that routing queue can no longer approve and are removed from the routing queue.
- Some proposals may require other institutional approvals from the appropriate vice-president or president. ORGS will alert you to other required approvals that will occur outside of Cayuse.
- As the PI/PD, you should frequently login to Cayuse to monitor this approval process when you have an active proposal.

Routing Order

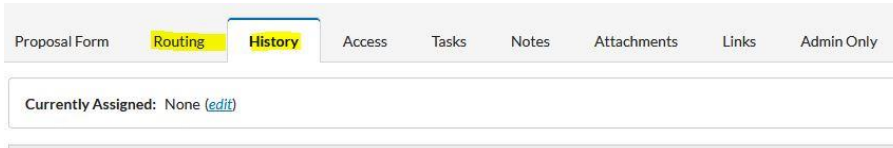
In Cayuse, the routing queue follows this order:

1. **The lead grant person routes for review to ORGS.** This is typically either the Principal Investigator (PI) or Project Director (PD).
2. **ORGS team performs an initial review**
 - a. If proposal has missing/incorrect items:
 - i. ORGS changes status to “In development”
 - ii. ORGS may also email PI/PD or create a Cayuse Task
 - iii. As needed, ORGS will copy the chair, dean, etc.
 - b. If proposal is accurate and complete, ORGS approves
3. **PI/PD and any co-PIs certify the proposal**
4. **ORGS team completes formal review**
5. **PI/PD supervisor team**
 - a. Academic colleges - chair and dean review
 - b. Director level or above - no further approvals required
 - c. Other units – supervisor reviews
6. **ORGS team approves** (for submission purposes)
 - a. Reviews final package
 - b. Prepares package for submission to sponsor
7. **ORGS dean approves** (for submission purposes)
8. **For federal proposals or proposals over \$450,000**, the appropriate VP and the President must approve. ORGS is responsible for this approval which occurs external to Cayuse.

Monitoring the approval process

You can monitor the routing process using the **Routing** and **History** tabs.

- History tab reflects status changes
- Routing tab reflects approvals or denials



Routing Example – declined and returned

Beverly declined this proposal as the record was missing items.

College of Education	Christina Sinclair Heather Hawkins Judy Abbott Stacy Hendricks	
Education Studies	Jannah Nerren	
ORGS - Proposal External	Beverly Morehouse ✓	Approved
English and Creative Writing	Elizabeth Tasker	
ORGS - Proposal External	Beverly Morehouse ✗	Declined
ORGS - Proposal External	Beverly Morehouse ✗	Declined
ORGS - Proposal External	Beverly Morehouse ✗	Declined

History Example

The status changes reflect when Beverly returned the proposal to the originator.

Status was changed from: Under Review to In Development	Beverly Morehouse	8/7/2023 01:17:37 PM
Status was changed from: In Development to Under Review	Beverly Morehouse	8/7/2023 01:16:54 PM
Status was changed from: Under Review to In Development	Beverly Morehouse	8/7/2023 01:15:43 PM
Status was changed from: In Development to Under Review	Beverly Morehouse	8/7/2023 01:15:18 PM
Status was changed from: Under Review to In Development	Beverly Morehouse	8/7/2023 01:14:35 PM
Status was changed from: In Development to Under Review	Beverly Morehouse	8/7/2023 01:14:18 PM
Status was changed from: Under Review to In Development	Beverly Morehouse	8/7/2023 01:14:08 PM
Status was changed from: In Development to Under Review	Beverly Morehouse	8/7/2023 01:11:43 PM
Status was changed from: Under Review to In Development	Beverly Morehouse	8/7/2023 01:11:29 PM

Routing Example – all approvals recorded

The green check beside the member’s name in each team and the status of “approved” inform you that all required approvals are completed.

In this example, the ORGS Dean level was not required for internal proposals. Thus, that team level does not have the green check.

Team	Members	Status
URC - Chair	Nicholas Long ✓	Approved
ORGS - Proposal Internal	Jennifer Hanlon Patterson ✓	Approved
ORGS - Proposal Internal	Jennifer Hanlon Patterson ✓	Approved
College of Education	Judy Abbott ✓	Approved
ORGS - Dean	Sheryll Jerez	Not Yet Active
Education Studies	Jannah Nerren ✓	Approved
ORGS - Proposal Internal	Jennifer Hanlon Patterson ✗	Declined
Principal Investigator	Amber Wagnon	Certified

Completing Ad Hoc Tasks in Proposal or Award Records

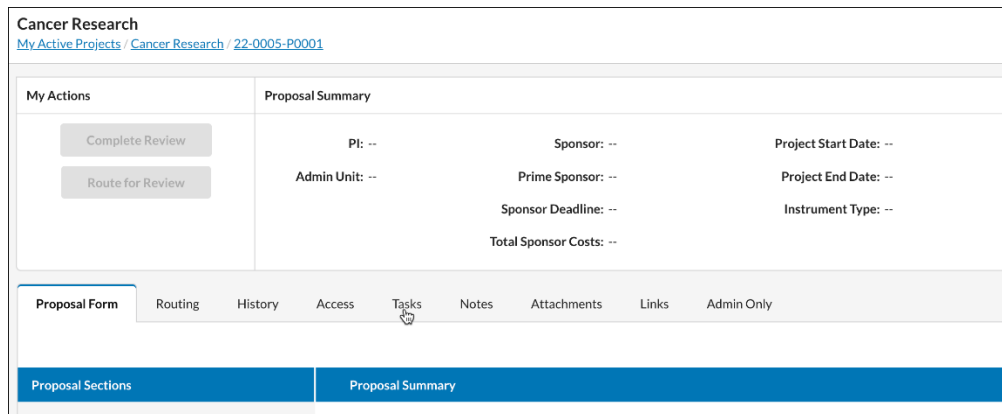
If you have been assigned a task within a proposal or award record, you can view and complete the task from different areas of the application, including:

- Task notification email
- SP 4.0 My Tasks slideout
- My Tasks lists on the Cayuse Platform landing page

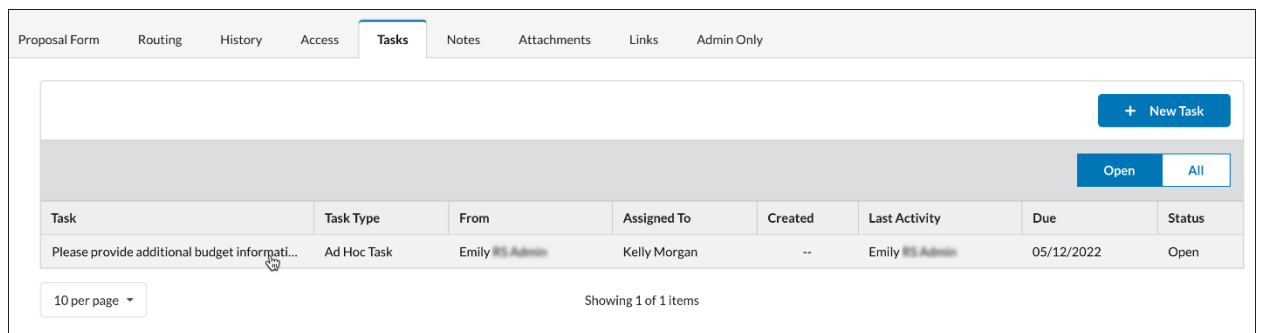
Please note: To ensure task email notifications are received, check with your RS Admin or SP Templates Manager to confirm [Ad Hoc email template](#) notifications are enabled.

Opening and Completing Tasks from Notification Emails

- From the task notification email, click the **link** provided to be automatically directed to the proposal or award requiring action.
- Once the proposal or award record is open, click on the **Tasks** tab.



- Click on the **task** you wish to close.



- Update Task Status to **Closed**, and then click **Save Changes**.

Task ✕

Assign To*

Due*

Task*

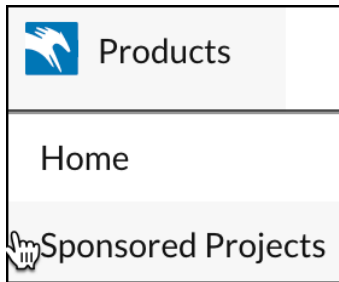
Please provide additional budget information.

URL

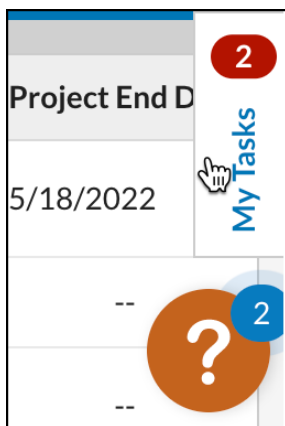
Task Status*

Opening and Completing Tasks from the My Tasks Slideout

- From the platform landing page, click **Products**, then click **Sponsored Projects**.



- Click the **My Tasks** slide-out.



- Click the task you'd like to close.

My Tasks	
Task	For
Review Proposal for Research Team	21-0003-P0001
Review Proposal for Research Team	21-0001-P0001

- Once the proposal or award record is open, click on the **Tasks** tab.

Cancer Research
[My Active Projects](#) / [Cancer Research](#) / [22-0005-P0001](#)

My Actions

[Complete Review](#)

[Route for Review](#)

Proposal Summary

PI: -- Sponsor: -- Project Start Date: --

Admin Unit: -- Prime Sponsor: -- Project End Date: --

Sponsor Deadline: -- Instrument Type: --

Total Sponsor Costs: --

Proposal Form Routing History Access **Tasks** Notes Attachments Links Admin Only

Proposal Sections Proposal Summary

- Click on the **task** you wish to close.

Proposal Form Routing History Access **Tasks** Notes Attachments Links Admin Only

[+ New Task](#)

[Open](#) [All](#)

Task	Task Type	From	Assigned To	Created	Last Activity	Due	Status
Please provide additional budget informati...	Ad Hoc Task	Emily ^{RS Admin}	Kelly Morgan	--	Emily ^{RS Admin}	05/12/2022	Open

10 per page Showing 1 of 1 items

- Update Task Status to **Closed**, and then click **Save Changes**.

Task ✕

Assign To* **Due***

Kelly Morgan 05/12/2022

Task*

Please provide additional budget information.

URL

<https://kellym.ft.cayuse.com/sp/proposals/2839007a-badc-4b22-96a7-b92f1f0910d5>

Task Status*

Closed

[Cancel](#) [Save Changes](#)

Opening and Completing Tasks from the My Tasks List

When you login to the Platform, you will see your **My Tasks** list on the landing page. For convenience, all of your Platform-connected application tasks will appear in this list.

My Tasks								+ New Task			
								Assigned to Me	Created by Me	Open	All
Task	Task Type	From	Assigned To	Created	Last Activity	Due	Status				
Please review the new proposal	Ad Hoc Task	Me	Darla Director	05/10/2021	05/10/2021	05/20/2021	Open				
Please approve the budget	Ad Hoc Task	Me	Me	05/10/2021	05/10/2021	05/17/2021	Open				

- From your My Tasks list, click on the task you wish to close.

My Tasks								+ New Task			
								Assigned to Me	Created by Me	Open	All
Task	Task Type	From	Assigned To	Created	Last Activity	Due	Status				
TASK: Please review these documents before submitting your proposal.	Ad Hoc Task	Me	Ernst Haeckel	08/27/2020	08/27/2020	08/28/2020	Open				

- Once the proposal or award is open, click on the **Tasks** tab.

Cancer Research	
My Active Projects / Cancer Research / 22-0005-P0001	
My Actions Complete Review Route for Review	Proposal Summary PI: -- Sponsor: -- Project Start Date: -- Admin Unit: -- Prime Sponsor: -- Project End Date: -- Sponsor Deadline: -- Instrument Type: -- Total Sponsor Costs: --
Proposal Form Routing History Access Tasks Notes Attachments Links Admin Only	
Proposal Sections	Proposal Summary

- Click on the **task** you wish to close.

Proposal Form								+ New Task	
								Open	All
Task	Task Type	From	Assigned To	Created	Last Activity	Due	Status		
Please provide additional budget informati...	Ad Hoc Task	Emily <small>RS Admin</small>	Kelly Morgan	--	Emily <small>RS Admin</small>	05/12/2022	Open		

10 per page Showing 1 of 1 items

- Update Task Status to **Closed**, and then click **Save Changes**.

Task ✕

Assign To*

Due*

Task*

Please provide additional budget information.

URL

Task Status*

Viewing All Tasks in a Record

If you want to view all of the open and closed tasks in a proposal or award record, navigate to the **Tasks** tab and click on **All**. A list of all tasks will be displayed.

Task	Task Type	From	Assigned To	Created	Last Activity	Due	Status
Please provide additional budget informat...	Ad Hoc Task	Emily RS Admin	Kelly Morgan	--	Emily RS Admin	05/12/2022	Open
Testing	Ad Hoc Task	Emily RS Admin	Emily RS Admin	--	Emily RS Admin	04/27/2022	Closed
Please check the budget status.	Ad Hoc Task	Emily RS Admin	Kelly Kamolinski	--	Emily RS Admin	05/27/2022	Open