



Electronic Proposal Development and Submission

User Reference Manual

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Getting Started with Cayuse 424

Browser Support for the Research Suite

The Research Suite can be accessed on various browsers on either Windows or Macintosh systems.

Windows

- Recent versions of Mozilla Firefox, Google Chrome, or Microsoft Internet Explorer 11.
- Provisional support for Microsoft Edge.

Macintosh

- Provisional support for recent versions of Google Chrome and Apple Safari.

Note: Cayuse discontinued support for Internet Explorer 10 and older on June 30, 2016.

All of the Research Suite modules run entirely in a web browser. Upon navigating to the Research Suite or to an individual module for the first time, your browser may present a security warning prompting you to accept a certificate. This is safe. Cayuse purchases and maintains electronic certificates that are approved for Internet commerce and are compliant with Internet security standards. Accept the certificate permanently, and you will proceed to the login screen.


In order to use the Research Suite, you will need to configure your browser as follows:

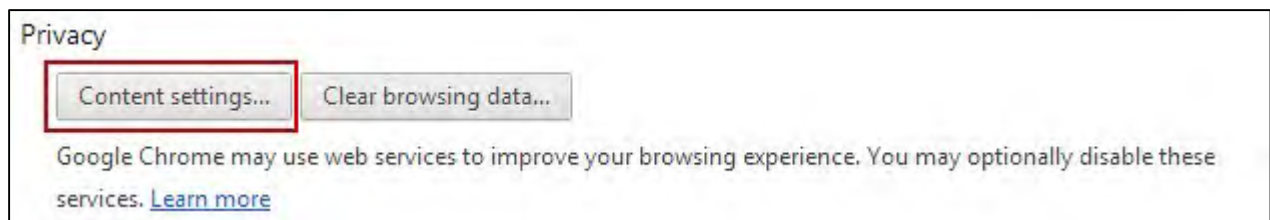
- Cookies Enabled
- Pop-ups Allowed
- JavaScript Enabled

In some browsers, cookies and pop-ups can be configured on a site-by-site basis.

Chrome Settings

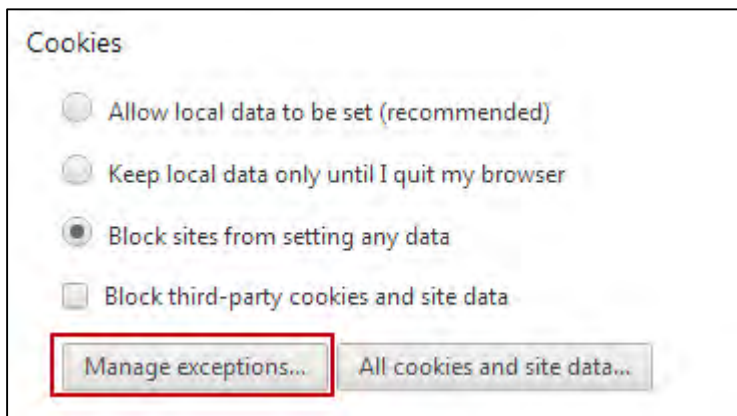
Accessing Chrome's Content Settings

- At the top right of Chrome, click the  button and select **Settings**.
- Select **Show advanced settings** at the bottom of the window.
- Find the section labeled **Privacy**, and select **Content settings...**



Enabling Cookies

Under **Cookies**, if **Allow local data to be set** or **Keep local data only until I quit my browser** is selected, cookies are already being accepted, and no changes are needed. If **Block sites from setting any data** is selected, add an exception by clicking [Manage exceptions](#).



Cookies

☐ Allow local data to be set (recommended)

☐ Keep local data only until I quit my browser

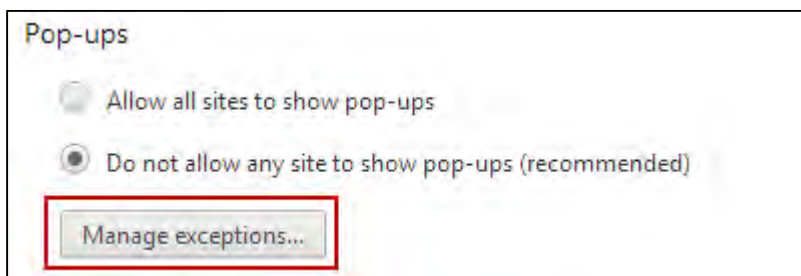
☒ Block sites from setting any data

☐ Block third-party cookies and site data

[Manage exceptions...](#) [All cookies and site data...](#)

Allowing Pop-Ups

Under the **Pop-ups** section, if **Allow all sites to show pop-ups** is selected, pop-ups are allowed and no changes are needed. However, if **Do not allow any site to show pop-ups** is selected, add an exception by clicking [Manage exceptions](#).



Pop-ups

☐ Allow all sites to show pop-ups

☒ Do not allow any site to show pop-ups (recommended)

[Manage exceptions...](#)

Enabling JavaScript

If you see a message like the one below, or if you're unable to perform some actions within Cayuse 424, you may need to enable JavaScript.



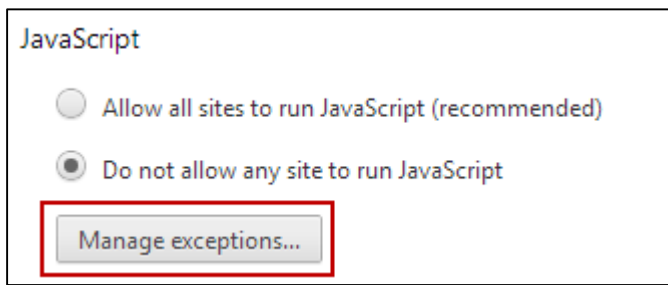
Username:

Password:

[SIGN IN](#)

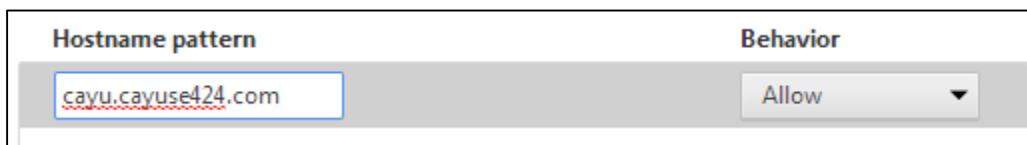
This site requires that Javascript be enabled.

Under the **JavaScript** section, if **Allow all sites to run JavaScript** is selected, Javascript is enabled, and no changes are needed. If **Do not allow any site to run JavaScript** is selected, add an exception by clicking [Manage exceptions](#).




Adding Exceptions for Security Rules

In the window that appears, enter your institution's Cayuse 424 URL as it appears in your browser. For example, in the image below you can see how University of Cayuse (cayu) would be entered. Under **Behavior**, make sure **Allow** is selected. Then click Doneto add the exception.



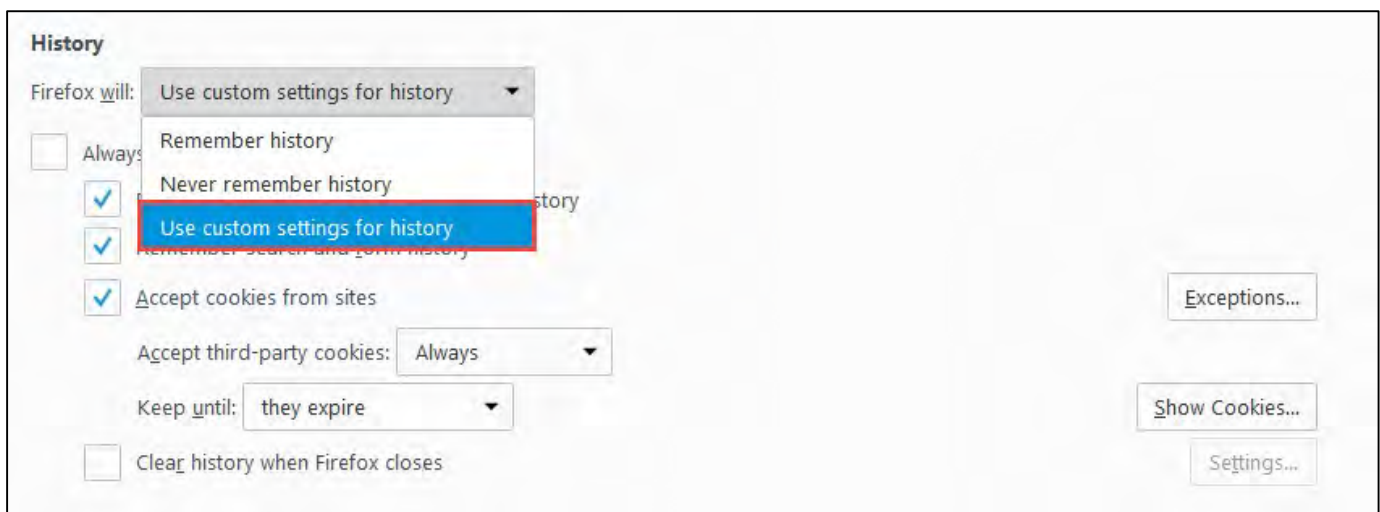
Firefox Settings

At the top left of your Firefox window, click the **Firefox** button and select **Options**. Alternatively, if you do not see a **Firefox** button, click the click the  button in the upper right and select **Options**.

Enabling Cookies

Navigate to the **Privacy** section.

If **Remember History** is selected, cookies are already being accepted and no further changes are required. If **Never remember history** is selected, select **Remember history** or **Use custom settings for history**.



If you wish to use custom settings, you can either check the option to **Accept cookies from sites** to accept cookies for all websites, or uncheck it and use the Exceptions button to allow cookies only for Cayuse 424.

Exceptions - Cookies

You can specify which websites are always or never allowed to use cookies. Type the exact address of the site you want to manage and then click Block, Allow for Session, or Allow.

Address of website:

cayu.cayuse424.com

Site	Status
------	--------

If creating an exception, enter your institution's Cayuse 424 URL as it appears in your browser, then select **Allow**.

Allowing Pop-Ups

Navigate to the **Content** section and make sure that **Block pop-up windows** is unchecked.

Alternatively, if you wish to allow pop-ups only for Cayuse 424 while blocking pop-ups on other sites, click **Exceptions** and enter your institution's Cayuse 424 URL as it appears in the address bar. Then, click **Allow**.

Allowed Sites - Pop-ups

You can specify which websites are allowed to open pop-up windows. Type the exact address of the site you want to allow and then click Allow.

Address of website:

cayu.cayuse424.com

Allow

Site	Status
------	--------

Remove Site Remove All Sites

Cancel Save Changes

Enabling JavaScript

If you see a message like the one below, or if you're unable to perform some actions within Cayuse 424, you may need to enable JavaScript.

Username:

Password:

SIGN IN ►


This site requires that Javascript be enabled.

Note: To simplify Firefox, the ability to disable JavaScript was removed from the standard options panel. There is advanced functionality mentioned here that could potentially damage your Firefox installation if used incorrectly.

1. In the address bar, type "about:config" (with no quotes), and press Enter. (You can learn more about the advanced options panel at [Mozilla's KnowledgeBase](#).)
2. If a dialog box warning you about the risks of editing about:config pops up, click **I'll be careful, I promise**. If about:config has been accessed previously on your Firefox, you may not see this message.
3. In the search bar, search for "javascript.enabled" (with no quotes). If the value is **true**, JavaScript is already enabled in Firefox. If it is **false**, double click the result named **javascript.enabled**. JavaScript should now be enabled and the value should show "true".

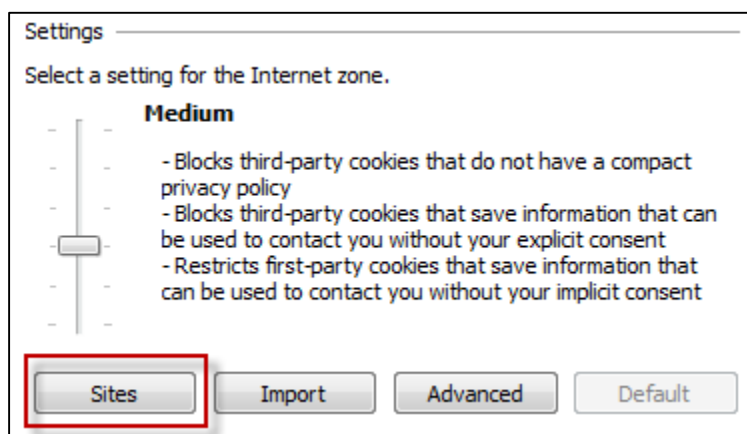
Search: javascript.enabled			
Preference Name	Status	Type	Value
javascript.enabled	default	boolean	true

Internet Explorer Settings

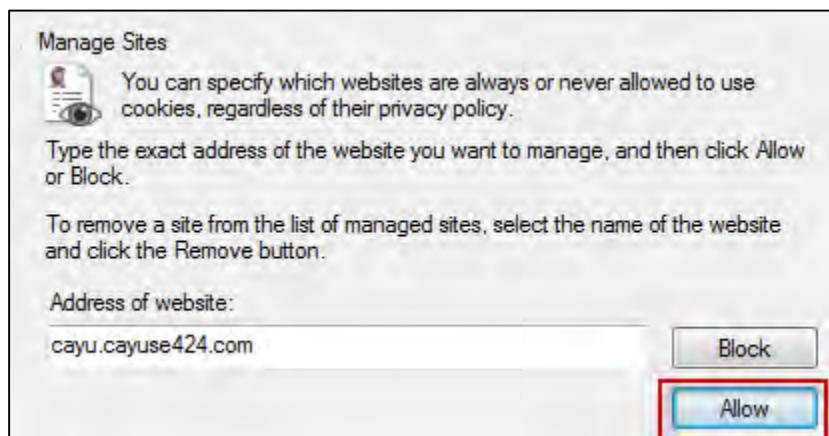
At the top right of your Internet Explorer window, click the  icon and select **Internet Options**.

Enabling Cookies

Go to the **Privacy** tab. Under **Settings**, unless the slider is at **Block all cookies**, then you don't need to change anything. Otherwise, add an exception for Cayuse 424 by clicking the **Sites** button.

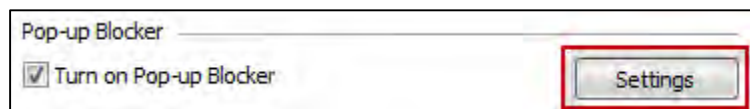


Enter your institution's Cayuse 424 URL as it appears in your browser, then click **Allow**. This example shows the URL for the University of Cayuse (cayu).

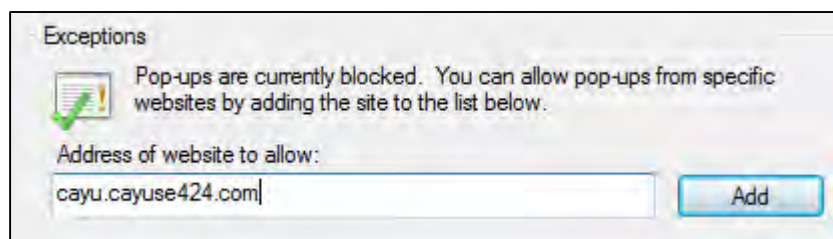


Allowing Pop-Ups

Go to the **Privacy** tab. If **Turn on Pop-up Blocker** is unchecked, then you don't need to change anything. If it is checked, add an exception for Cayuse 424 by clicking **Settings**.



Enter your institution's Cayuse 424 URL as it appears in your browser, then click **Add**. This example shows the URL for the University of Cayuse (cayu).

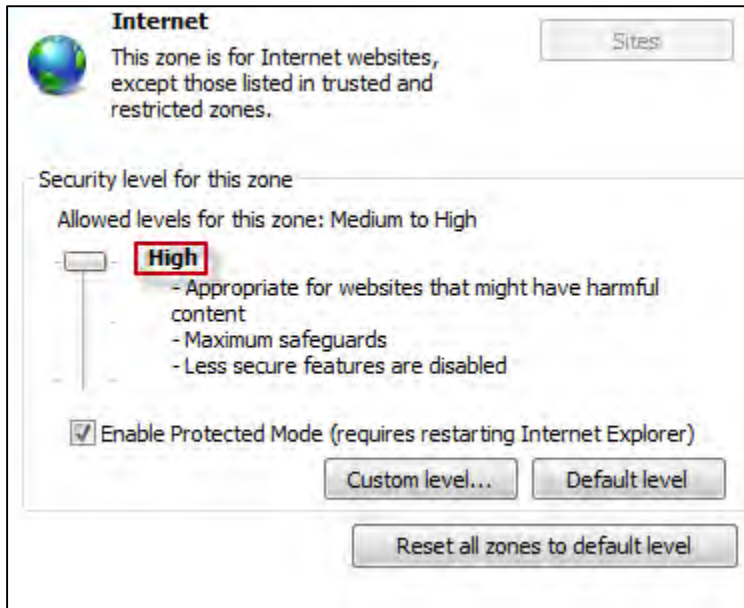


Enabling JavaScript

If you see a message like the one below, or if you're unable to perform some actions within Cayuse 424, you may need to enable JavaScript.

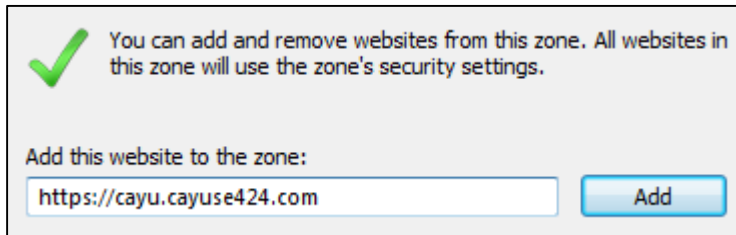


Go to the **Security** tab. If your Security Level for **Internet** is set to **High**, then you will need to add Cayuse 424 to the list of Trusted sites.

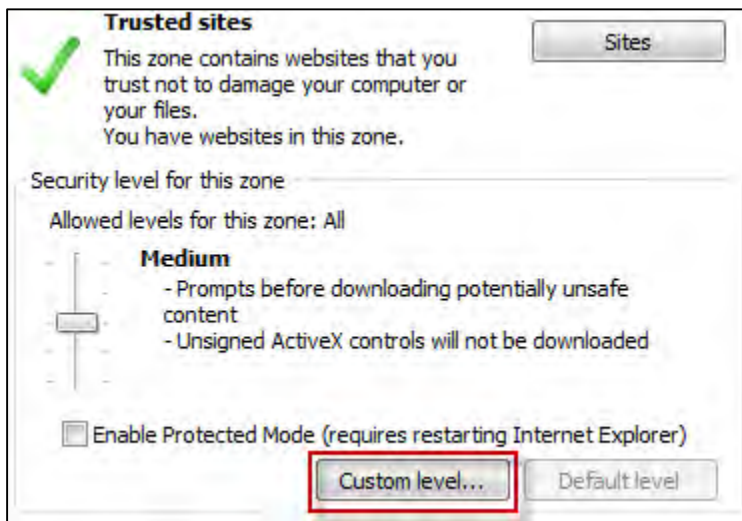


Select the green **Trusted sites** icon, then click **Sites**.

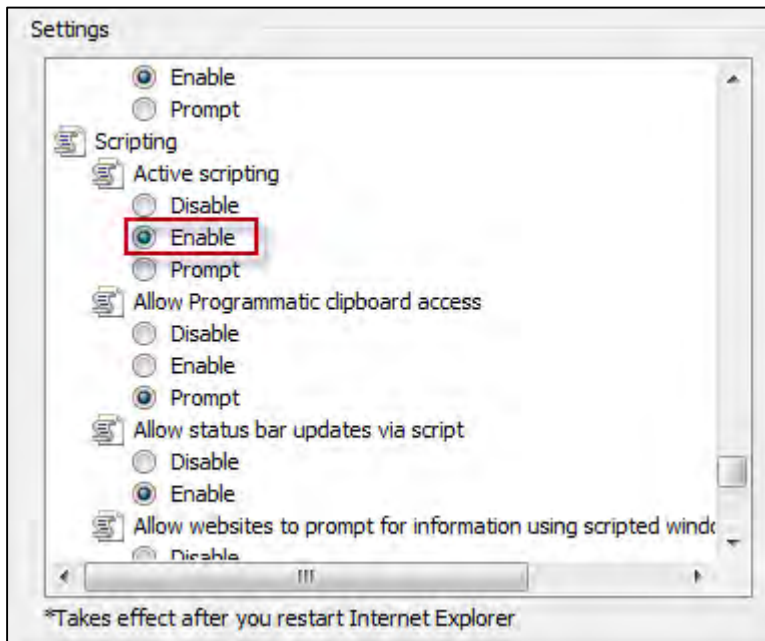
In the Sites window, enter your institution's Cayuse 424 URL as it appears in your browser, then click **Add**. This example shows the URL for the University of Cayuse (cayu).



Under **Security level for this zone** for your Trusted Sites, unless the slider is at **High**, no changes are needed. Otherwise, select **Custom level** to specifically enable scripting.



Under **Scripting**, make sure that **Active scripting** is set to **Enable**, then click **OK**.

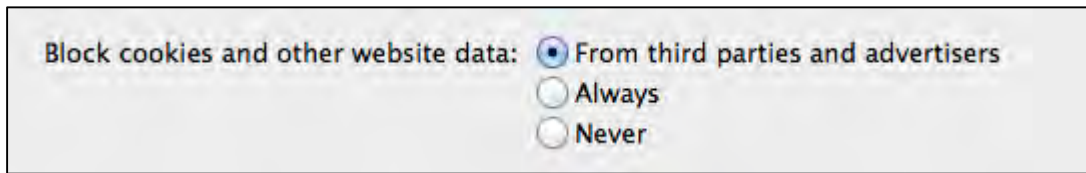


Safari Settings

In the top menu bar, click **Safari** and select **Preferences**.

Enabling Cookies

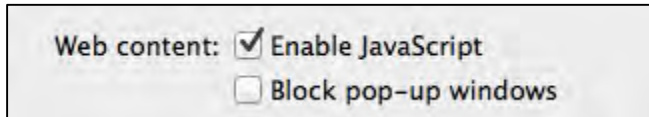
Go to the **Privacy** tab. For **Block cookies and other website data**, if **From third parties and advertisers** or **Never** is selected, cookies are already being accepted and no changes are needed. If **Always** is selected, select one of the other options.



Block cookies and other website data: ☒ From third parties and advertisers
☐ Always
☐ Never

Allowing Pop-Ups and Enabling JavaScript

Go to the **Security** tab. For **Web content**, confirm that **Enable Javascript** is checked and **Block pop-up windows** is unchecked. These settings must be in place for Safari to display Cayuse 424 properly.



Web content: ☒ Enable JavaScript
☐ Block pop-up windows


You are welcome to revert back to your previous settings when your Cayuse 424 session is complete.

If you're having any trouble accessing Cayuse 424 or the Research Suite, you may want to [clear your cookies](#).

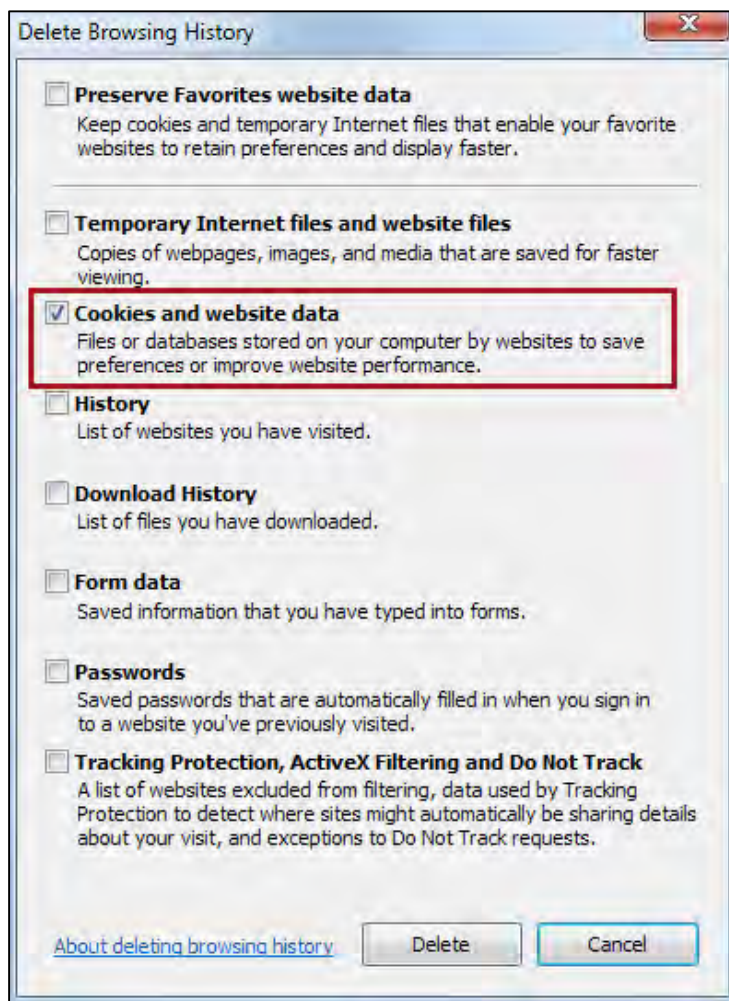
Clearing Cookies

This page contains instructions for clearing your cookies in [Internet Explorer](#), [Firefox](#), [Chrome](#), and [Safari](#).

Clearing Cookies in Internet Explorer


Click the  icon in the top right of the screen, then go to **Safety-> Delete Browsing History**. Alternatively, if you do not have a gear icon, select **Tools** at the top left of the screen, then go to **Delete Browsing History**.

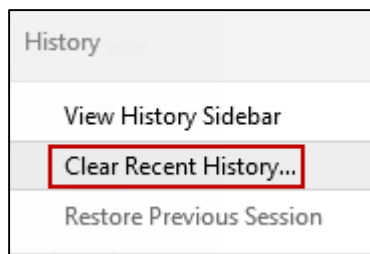
Check the box to delete **Cookies and website data**. Make sure that none of the other options are selected if you do not wish to also delete these items. Click **Delete** at the bottom of the window.



Note: This window may differ in appearance slightly depending on your version of Internet Explorer. If you have any questions or concerns, please contact Support and we would be happy to guide you through the steps.

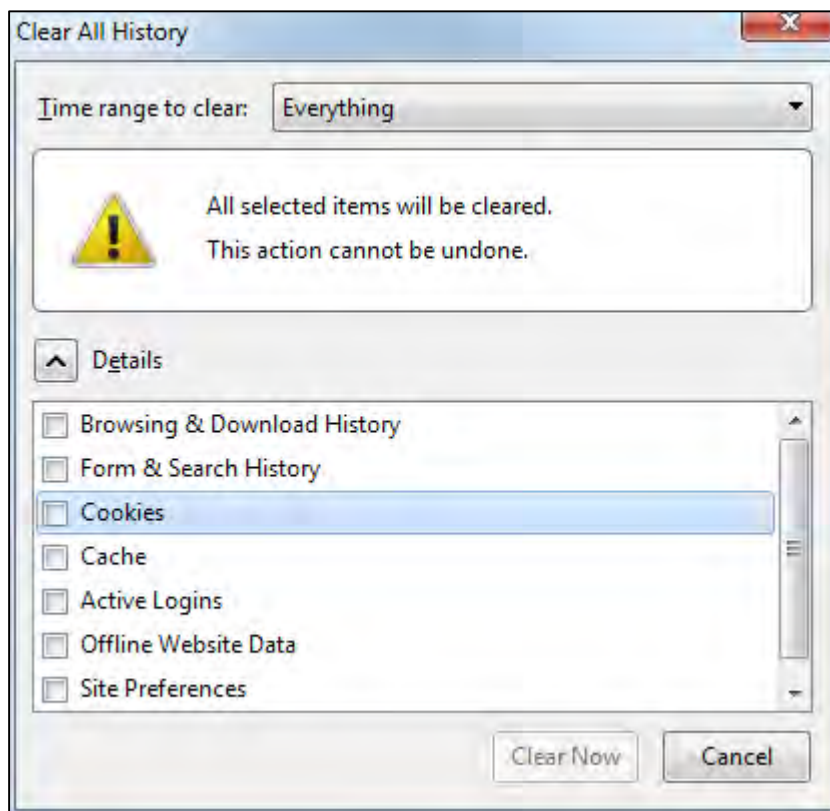
Clearing Cookies in Firefox

Click the  icon at the top right of the screen, and select **History**. Then, select **Clear Recent History**.



Alternatively, if you do not have this icon, select **History** at the top left of the screen, and then select **Clear Recent History**.


Under **Time range to clear:**, select **Everything**. Click the  icon next to **Details** to display a list of selectable items.

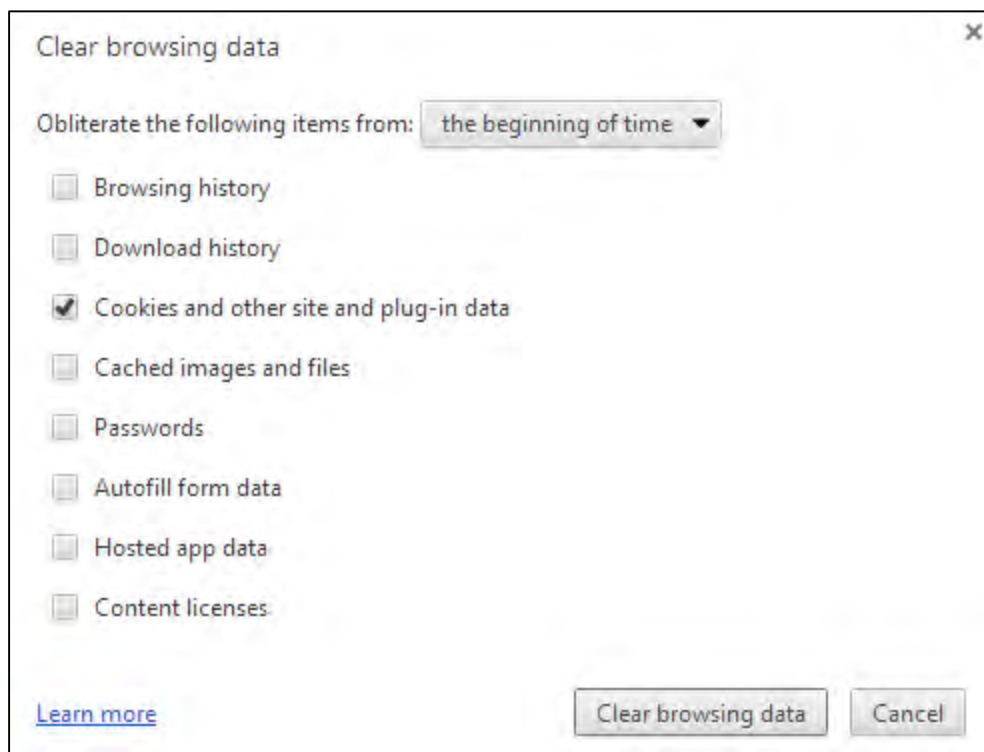


Check the box beside **Cookies**. Make sure that none of the other items are checked if you do not wish to also delete these items. Click **Clear Now** at the bottom of the window.

Note: This process may differ from what is stated above, depending on your version of Firefox. If you have any questions or concerns, please contact Support and we would be happy to guide you through the steps.

Clearing Cookies in Chrome

Click the  icon at the top right of the screen, and highlight **Tools**. Select **Clear Browsing Data** in the submenu. Under **Obliterate the following items from**, select the **beginning of time**.

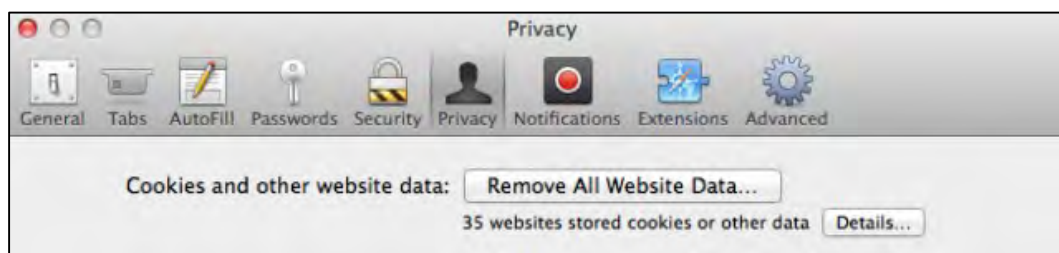


Check the box beside **Cookies and other site and plug-in data**. Make sure that none of the other items are checked if you do not wish to also delete these items. Then, click **Clear browsing data** at the bottom of the window.

Note: This process may differ from what is stated above, depending on your version of Chrome. If you have any questions or concerns, please contact Support and we would be happy to guide you through the steps.

Clearing Cookies in Safari

Click **Safari** at the top right of the screen, and select **Preferences**. Select the tab labeled **Privacy**.



Under Cookies and other website data:, click Remove All Website Data. Click Remove Now in the next window.

Note: This process may differ from what is stated above, depending on your version of Safari. If you have any questions or concerns, please contact Support and we would be happy to guide you through the steps.

Basic Navigation

After signing in to Cayuse 424, you will find yourself on the Overview tab. The Overview tab is a quick way to get to any other section of Cayuse 424.

Each tab in Cayuse 424 corresponds to a major functional area of the application where you can complete tasks related to that area.

Opportunities

The Opportunities tab contains opportunities that have previously been downloaded from Grants.gov by someone at your institution. From the Opportunities tab, you can:

- Download available opportunities
- View details of downloaded opportunities
- Create new proposals

Proposals

The Proposals tab has a list of all the proposals that you have permission to see. From the Proposals tab, you can:

- Search for a proposal you want to review or edit.
- Create or edit a proposal or subaward.
- Link subawards to proposals.
- Import a subaward.

Routing

The [Routing tab](#) lists proposals that currently or will soon require your approval. If you don't have any proposals currently being routed to you, then you won't see anything here. From the Routing tab, you can:

- Approve proposals that are being routed to you.
- Check the status of proposals that may soon require your attention.

People

The People tab lists professional profiles in your institution's instance of Cayuse 424. Professional profiles store information about people at your institution. The information in these profiles can be easily autofilled into proposals. From the People tab, you can:

- Search for people and view their professional profiles.
- Create or edit a profile for a person at your institution.
- Link a professional profile to an institutional profile.

Institutions

The [Institutions tab](#) contains the institutional profiles currently in your Cayuse 424 application. Typically, the primary profile is for your home institution, but if you frequently work with other institutions, you can create additional institutional profiles that can be autofilled into proposals. From the Institutions tab, you can:

- View institutional profile information.
- [Create or edit an institutional profile](#) if you have access to do so.

Reports

The [Reports tab](#) shows a list of reports that you can create from the data within Cayuse 424. You will only be able to

create reports on data you have access to in Cayuse 424. Most reports allow you to choose your time period and some have other options you can select. The available reports are:

- Submitted proposals (with or without direct links to the proposals).
- Proposals by Department.
- Proposed Dollars (submitted proposals with proposed dollar amount).
- Awarded Proposals by Department.
- Awards by Agency.
- Proposed Subawards.
- Awarded Subawards.

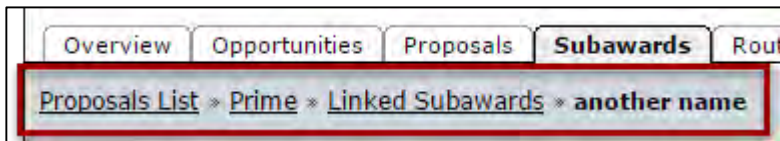
Settings

The Settings tab is where you manage your user account within Cayuse 424. From the Settings tab, you can:


- Change your password.
- Change your email address.
- Link your user account to your professional profile.

Quick Navigation

Cayuse 424 contains navigation links that make it easy and safe to move between screens or to refresh a list. One such tool is the "breadcrumb trail," which appears beneath Proposals, People and other tabs once you have opened a proposal, a Professional Profile or other record. The example below illustrates the breadcrumb trail you would see while viewing a linked subaward on a proposal.



The underlined words are links that take you back to a previous screen. When you return to a previous screen in the breadcrumb trail, Cayuse 424 automatically refreshes the page.

In addition, most pages in Cayuse 424 contain a  icon. Use this icon to update or refresh a page rather than using the browser's standard **Refresh** button.

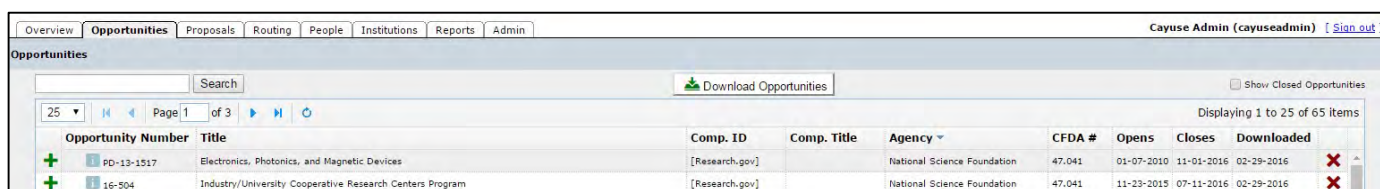
Note: While working in Cayuse 424 and other web applications, avoid using the **Back**, **Forward** and **Refresh** buttons in your browser. On simple web sites, these buttons are appropriate for browsing. For Cayuse 424 and other complex web applications which handle important data transactions, it's best to use the controls built into the application

User Reference Manual

Below you will find links to help you navigate the User Reference Manual for the Cayuse 424 application. Using these links or the links on the sidebar will allow you to quickly navigate the various sections in this User Reference Guide.


Opportunities

The Opportunities tab lists federal funding opportunities that have been downloaded to your Cayuse 424 instance. At the top of the page, you can [download opportunities](#) that have not yet been added to Cayuse 424, or [search for opportunities](#) that have already been downloaded.

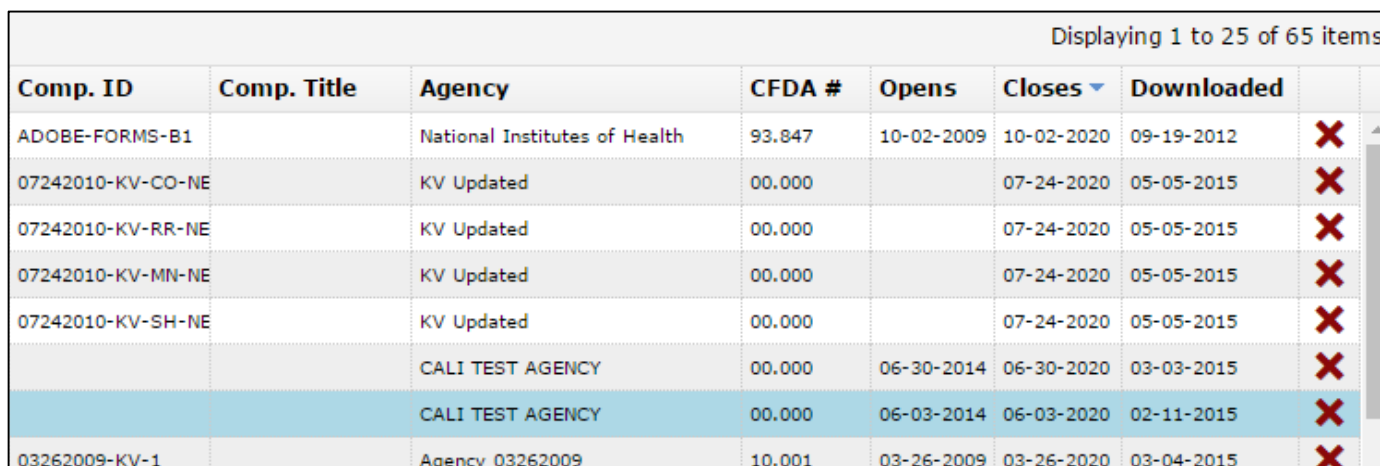


The screenshot shows the Cayuse Admin interface with the 'Opportunities' tab selected. At the top, there are navigation tabs: Overview, Opportunities, Proposals, Routing, People, Institutions, Reports, and Admin. The 'Opportunities' tab is active. Below the tabs, there is a search bar and a 'Download Opportunities' button. A table displays a list of opportunities. The table has columns: Opportunity Number, Title, Comp. ID, Comp. Title, Agency, CFDA #, Opens, Closes, and Downloaded. Two opportunities are visible: PD-13-1517 and 16-504, both from the National Science Foundation.

Opportunity Number	Title	Comp. ID	Comp. Title	Agency	CFDA #	Opens	Closes	Downloaded
PD-13-1517	Electronics, Photonics, and Magnetic Devices	[Research.gov]		National Science Foundation	47.041	01-07-2010	11-01-2016	02-29-2016
16-504	Industry/University Cooperative Research Centers Program	[Research.gov]		National Science Foundation	47.041	11-23-2015	07-11-2016	02-29-2016

At the top left of the page, you'll see a small green refresh button . If you leave the Opportunities tab and an opportunity is updated while you are elsewhere in Cayuse 424, you can click the refresh button to display those updates. This will happen automatically the first time you access the Opportunities tab during a session.


Opportunities can also be sorted by each field displayed on the Opportunities tab. Click once to sort by that header, and click again to reverse the sorting. For example, you can sort opportunities in alphabetical order, or sort by closing date.



The screenshot shows a detailed view of the Opportunities tab. It displays a table with columns: Comp. ID, Comp. Title, Agency, CFDA #, Opens, Closes, and Downloaded. The table is sorted by 'Closes' in descending order. The first row is highlighted in blue. The table shows 25 items, with a 'Displaying 1 to 25 of 65 items' message at the top right.

Comp. ID	Comp. Title	Agency	CFDA #	Opens	Closes	Downloaded
ADOBE-FORMS-B1		National Institutes of Health	93.847	10-02-2009	10-02-2020	09-19-2012
07242010-KV-CO-NE		KV Updated	00.000		07-24-2020	05-05-2015
07242010-KV-RR-NE		KV Updated	00.000		07-24-2020	05-05-2015
07242010-KV-MN-NE		KV Updated	00.000		07-24-2020	05-05-2015
07242010-KV-SH-NE		KV Updated	00.000		07-24-2020	05-05-2015
		CALI TEST AGENCY	00.000	06-30-2014	06-30-2020	03-03-2015
		CALI TEST AGENCY	00.000	06-03-2014	06-03-2020	02-11-2015
03262009-KV-1		Agency 03262009	10.001	03-26-2009	03-26-2020	03-04-2015

Opportunity Information

Click the info icon  to the left of an opportunity to view more information about it. The Opportunity Details window includes links to the schema, instructions, and Adobe form package. You will also find detailed primary agency contact information, in case you have any questions about the opportunity.



Opportunity Details

Opportunity Number: EDAFY12DISASTERRELIEF

Opportunity Title: FY 2012 Disaster Relief Opportunity

Competition Id: 5

CFDA Number: 11.307

CFDA Description: Economic Adjustment Assistance

Offering Agency: Economic Development Administration

Agency Contact: Josh Barnes

E-mail: joshua.j.barnes@eda.gov

Opening Date: 2012-03-28 00:00:00.0

Closing Date: 2015-03-27 00:00:00.0

Schema: [oppEDAFY12DISASTERRELIEF-cfda11.307-cid5.xsd](#)

Instructions: [oppEDAFY12DISASTERRELIEF-cfda11.307-cid5-instructions.pdf](#)

PDF: [oppEDAFY12DISASTERRELIEF-cfda11.307-cid5.pdf](#)

You can also see a list of forms associated with the Opportunity. This section tells you if the forms are **Supported** and/or **Mandatory**. If any forms are not supported by Cayuse 424, they will have a red X next to them. If the opportunity is not supported by Cayuse 424, the form or forms preventing proposal creation will be listed at the bottom of the window.

Forms

Supported Mandatory		Namespace URI
*	*	http://apply.grants.gov/forms/SF424-V2.0
*	*	http://apply.grants.gov/forms/CD511-V1.1
*	*	http://apply.grants.gov/forms/SF424D-V1.1
*	*	http://apply.grants.gov/forms/SF424C-V1.0
X	*	http://apply.grants.gov/forms/ED_900-V1.0
*		http://apply.grants.gov/forms/Attachments-V1.1
*		http://apply.grants.gov/forms/SFLLL-V1.1

This opportunity *is not* supported by **Cayuse424**:



- unsupported form: http://apply.grants.gov/forms/ED_900-V1.0


Multi-Project Opportunity Information

The information that appears when working with a Multi-Project Opportunity is slightly different than what appears with other Opportunities. For more information, take a look at [Multi-Project Opportunity Information](#).

Opportunity Status

These icons may appear to the left of opportunities in Cayuse 424.

Icon	Description
	Expired: This opportunity is past its closing date. While proposals can still be created based on this opportunity, they will be rejected in most cases.
	Unsupported: Cayuse 424 does not support one or more forms on this opportunity, and cannot create a proposal based on this opportunity.

Once you've found the opportunity you are interested in, click the  shown next to the opportunity to [create a proposal](#) with this opportunity.

Downloading Opportunities

If you're browsing or [searching](#) for an opportunity and can't find it, the opportunity may not have been downloaded into your Cayuse 424 application. You need to download an opportunity before it can be viewed in Cayuse 424. To download an opportunity:

1. Click the **Download Opportunities** button at the top of the page.



2. You'll see a new window showing the Download Opportunities dialog:



3. Enter the opportunity number or CFDA Number. Be sure to enter the number exactly as it is provided, including any hyphens.
4. Click **Download Opportunities**. This will download any opportunities related to that opportunity number or CFDA number into Cayuse 424.

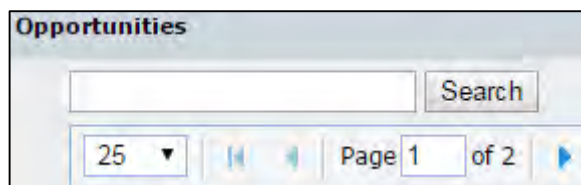
Once downloaded, opportunities will be listed in the Opportunities tab for easy access. If you're having trouble finding the opportunity you need, you can [search for it](#).

If you're having trouble downloading an opportunity, double-check the opportunity number, or try downloading it by CFDA number. You can also [search for the opportunity on Grants.gov](#) to find this information.

Searching for Opportunities

If you've downloaded an opportunity in Cayuse 424 but are having trouble finding it, you can search the list of opportunities. To search the list:

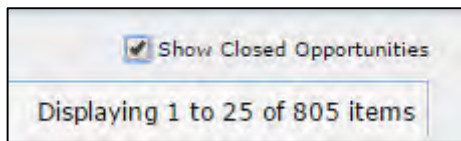
1. Type the opportunity number, CFDA number, or any number of words from the title of the opportunity into the search box at the top of the Opportunities tab.




2. Click **Search**.

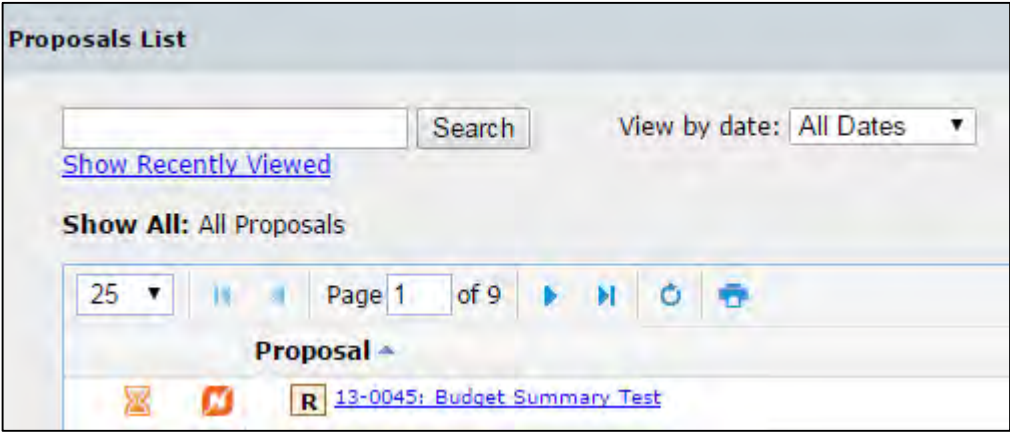
You can search by just part of the opportunity number or CFDA number as well. Remember to include any dashes that are part of the opportunity number.

If you still aren't seeing your opportunity, it may have already closed. Be sure the **Show closed opportunities** checkbox is checked and try the search again.



Proposals

The Proposals tab shows a list of proposals that have been created within Cayuse 424. This is the area of Cayuse 424 where you will spend most of your time. The Proposals tab is where you will create, develop, and review proposals. From the Proposals list, you can not only [open your proposals and subawards](#), but also [create new proposals](#), [search for existing proposals](#), and [copy or transform proposals](#). In addition to creating proposals you can [import subawards](#). You can also print the list of proposals with any sorts or filters you have used on the list by clicking the print icon  on the navigation bar.



Once you've [opened a proposal](#), you can [open and edit it](#), including adding [Key Persons](#), [Performance Sites](#), and [attachments](#) as well as [developing your budget](#). You can also [grant other people access to it](#), [submit it](#), or [check the proposal's development history](#).

Creating a New Proposal

To create a proposal directly from Proposals List, click the **Create Proposal** button  at the top of the screen. You'll see the following dialog:



The dialog box is titled "Create Proposal" and features a green plus icon in the top left corner. It contains three radio button options for selecting the proposal type. The first option, "Grants.gov", is selected. Below each option is a descriptive text block. At the bottom of the dialog are two buttons: "Create" and "Cancel".

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.

☐ **Subaward Proposal**

Subaward proposal for internal use or for sending to other Cayuse424 sites.

Create **Cancel**

Choose the type of proposal you are creating:


- **Grants.gov** - a proposal for a federal opportunity, to be submitted via Grants.gov.
- **Other Proposal** - non-federal proposals and internal opportunities that are not submitted to Grants.gov.
- **Subaward proposal** - a subaward proposal to attach to a prime proposal in your instance of Cayuse 424. Subawards can also be exported to other institutions that have Cayuse 424.

If you select **Grants.gov** and then click the **Create** button, you will be taken to a screen where you can [select the opportunity](#) you want to base your proposal on. If you select **Other**, you'll go directly to [filling in the proposal information](#).

If you want to create a Subaward proposal, the process is slightly different. Consult [Creating Subawards](#) for more information.

Selecting an Opportunity

When [creating a proposal](#) directly from the Proposals List and selecting Grants.gov as the type, you'll see the following dialog:












Create Grants.gov Proposal...

Select Opportunity

Search

Show closed oppor

	Opportunity Number	Title	Comp. ID
	 03262009-KV-2	03262009-KV-2	03262009-KV-1
	 HS-08-603	G.g AT07 NIH FOA FORM B2 in Test for R03 AHRQ	ADOBE-FORMS-B2
	 CAL-424-21	TEST SF-424 VERSION 2.1	
	 CAL-ADOBE-POC	CAL Adobe Test	

If you see the opportunity you want, select the opportunity by clicking on the  to the left of it in the list. If you don't see it, you can [search the opportunities](#), or sort them as you would [on the Opportunities tab](#).


Once you've found and selected your opportunity, you can continue with [filling in the proposal information](#).

Proposal Information

Once you've selected a proposal type (and, for federal proposals, [selected your opportunity](#)), you will be asked on the following screen to name the proposal, select a PI and Organization, and assign a validation type.


If you're creating a Federal proposal, you'll see the opportunity you selected at the top. If you have selected the wrong opportunity, click

Select a Different Opportunity to select another.



Create Grants.gov Proposal


Opportunity: PA-B2A-R01



Select A Different Opportunity

Otherwise, enter the information to create your proposal.

Proposal Name:



Search for PI

Showing recent PIs

[Show all](#)

Principal Investigator:

Adamson, Adam Chloe (Anatomy) / University of Cayuse

Amyson, Amy Cooper (Anesthesia and Perioperative) / University of Cayuse

Organization:

University of Cayuse

Default IDC Rate:

Please select...

of Budget periods:

☐ 1


☐ 2

☒ 3

☐ 4

☐ 5

Due Date:



Validation Type:

NIH

Create Proposal

Cancel

Name the Proposal

Your proposal name is the way the system will identify your proposal. This is different from the title of your proposal (which appears in field 11: DESCRIPTIVE TITLE OF APPLICANT'S PROJECT on the face page of the SF424RR). Your

institution may have a naming convention for the proposal name.

Select the Principal Investigator

Scroll through the PI list and select the person who will be the PI on this proposal. If the PI you wish to select is not in the list, be sure to search for the PI, or click show all. If the PI still isn't listed, their profile may not [indicate them as a PI under the eRA Roles section](#). If there are multiple PIs, select the one who will be the lead PI. Selecting a PI when creating a proposal is required.

Select the Organization

Select the primary institution for this proposal from the organization list. Choosing the organization when creating a proposal is optional, but recommended. You can also add or change the organization later while filling out the proposal.

Select the Number of Budget Periods

Select the number of Budget Periods that will be requested in the current proposal. Some grant mechanisms, like an NIH S10, only have a concept of a project period and no budget periods. In this situation, select 1 for the number of budget periods. Selecting the number of budget periods is required when creating a proposal, but this selection can easily be changed later when filling out the proposal.

Choose a Validation Type

Select an appropriate validation type for your proposal. For federal opportunities, choose the agency that sponsors the opportunity you have selected. This allows agency-specific validation rules to be applied to the proposal. If you are filling out a non-federal proposal, select "Other- Minimal".

For any federal proposal, Cayuse 424 performs validations based on the Grants.gov XML schemas that are published with the application forms as well as those specific to the agency validation type you select. The agency validation types are listed below:

Validation Type	Description
NIH	Runs all the NIH validations.
NIH - Opt Out	<p>This is shorthand for "opting out of limited validations." If your FOA is listed on the Opt-out page at NIH you should choose this option, which uses an alternative set of some NIH validations. For an explanation see the web page at NIH.</p> <p>Note: As of Cayuse 424 version 7.0, NIH has discontinued support for Opt-Out validations. Alternative validation guidance for opportunities with opt-outs is now provided by a web service. For historical purposes, the NIH Opt-Out selection remains in the Validation Type drop-down. You should still choose NIH - Opt Out for Opt-Out opportunities. The instructions in your FOA supersede any errors that Cayuse 424 may show.</p>
NIH - Minimal	Only used for RC4 applications.
CDC	Loads NIH validations for CDC proposals.
CDC - Opt Out	Loads NIH - Opt Out validations for CDC proposals.
CDC - Minimal	Loads a subset of NIH validations for CDC proposals.
AHRQ	This HHS agency uses the NIH validations.
HHS - Other	Use for HHS proposals which don't fit into the above validations.
NSF	Use for National Science Foundation proposals.

NIFA	Use for National Institute of Food and Agriculture proposals.
CDMRP	Use for Congressionally mandated research programs.
ONR	Use for Office of Naval Research proposals.
NASA	Use for NASA proposals.
Other Federal Agency	This selects only the XML validations (Grants.gov). Use this for any Federal Agency not listed above.
Other - Minimal	For other miscellaneous proposals - this validation set is rarely used.

You can also change your validation selection after you have started the proposal.

After choosing the validation type, click **Create Proposal**. The proposal will open and you'll see [the included forms and other information](#).

Creating a Multi-Project Proposal

The information that appears when working with a Multi-Project Proposal is slightly different than what appears with other Proposals. For more information, take a look at [Creating a Multi-Project Proposal](#).

Navigating Existing Proposals

By default, the Proposals List shows all proposals. Click the **Show Recently Viewed** link to view the 25 most recently viewed proposals for fast access. To sort the list by a particular column, click on the heading of that column. Clicking again will reverse the sort order.

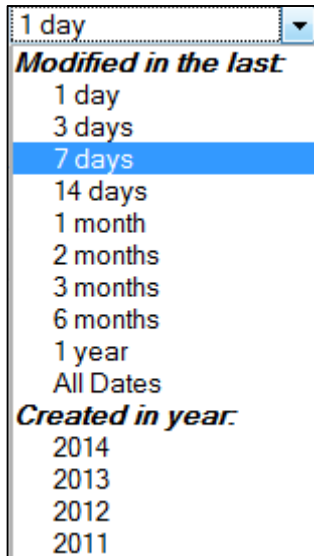
The dropdown at the top left controls how many Proposals can be viewed on one page. Up to 100 Proposals can be viewed on one page. Clicking ◀ will take you to the first page in a set. Clicking ◀ will take you to the previous page in a set. Clicking ▶ will take you to the next page in a set. Finally, clicking ▶ will take you to the last page in a set. You can also navigate to any available page by typing the number into the page box and hitting **Enter**.

The screenshot shows the top of the Proposals List interface. At the top left, there is a dropdown menu labeled 'Show All: All Proposals' with a value of '25' selected. Below the dropdown, a list of proposals is displayed. The first proposal is 'reproduce 11013' with a status icon 'R'. The second proposal is '32-004 subaward' with a status icon 'R'. Navigation controls are visible above the list, including 'Page 1 of 4' and buttons for previous, next, first, and last page.

Clicking ↻ will refresh the Proposals List. If you're looking for a recently created proposal and you are unable to find it, refreshing the Proposals List is a good place to start.

Clicking **Show All** lists all the proposals that you are able to view. When you're viewing all your proposals, as above, clicking **Show Recently Viewed** returns you to the shorter list. Checking **Make Show All the default view** means Cayuse 424 will show all of your proposals whenever you log in. This setting is user specific, so it can be changed without impacting other users.

To view older proposals, use the **Show All: View by date** dropdown. Select **Modified in the last:** to see recently modified proposals, or **Created in year:** to view all proposals by creation date.








To the right of the **View by date** dropdown, there is an **Include submitted proposals** checkbox. When this box is checked, submitted proposals will show in the Proposals List. **Show only locked proposals** will only display proposals that currently have someone editing them.




Clicking **Expand All** at the top right of the screen will show all linked subawards currently on the Proposals List. **Collapse All** will hide all the linked subawards on the page. Subawards can be expanded or collapsed on an individual basis by clicking the **+** or **-** button to the left of a Prime proposal with subawards.

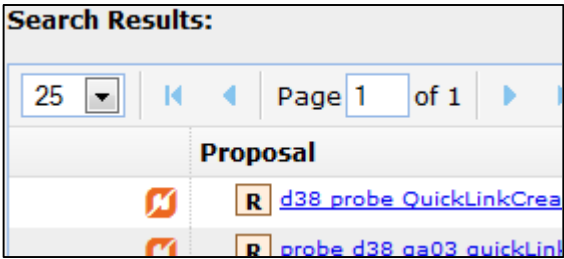
Proposal Status


Icons indicating the proposal status are shown to the left of the proposal.

Icon	Description
	<p>Submitted: The yellow lightning bolt indicates that the proposal has been submitted to Grants.gov. Hover over the icon to see the tracking number.</p>
	<p>Failed Transmission: The red lightning bolt indicates that the proposal was not successfully transmitted to Grants.gov.</p>
	<p>Marked as Submitted: The blue lightning bolt means that this non-Federal proposal has been manually marked as submitted via the Proposal Summary page of the proposal. (Does not show for Federal proposals.)</p>
	<p>Expired: The hourglass denotes that the opportunity that this proposal is using is past its deadline or has been superseded. While proposals can still be created based on this opportunity, they will be rejected in most cases.</p>
	<p>Archived Opportunity: The "red circle" means that the source opportunity for this proposal has been removed from the Grants.gov server and is no longer valid. To proceed with submitting this proposal, you will need to transform it to a valid opportunity.</p>

Paired SP Proposals

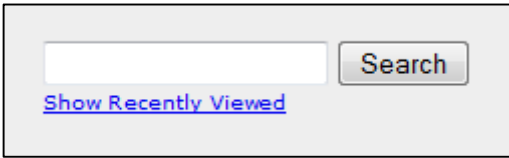
if your institution uses Cayuse SP, the  icon is also shown to the left of a proposal when that proposal is paired with an SP proposal.



Click on the  icon to open the paired Cayuse SP proposal.

Searching for Proposals

If you're not able to quickly locate the proposal you need, you can search the Proposals List using the search box in the upper left:

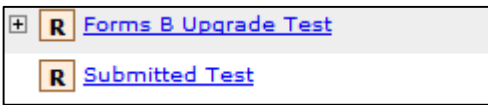


You can search for proposals by any of the columns in the list, including the proposal or project title, the PI, and even the proposal type. You can search for parts of words or names. If the proposal is associated with a federal opportunity, you can search by the opportunity number. If a proposal has been submitted, you can also search by GRANT tracking number.

If you're having trouble finding what you are looking for, try using different search terms, or use just part of the title or PI name.

Opening a Proposal

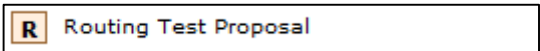
Opening a Proposal for Editing: To open a proposal you want to edit, click on the link for that proposal in the "Proposal" column of the list.



The link is only active when you have permission to edit the proposal and the proposal is not being edited by another user. When you open the proposal this way, you can review and edit the proposal.


A + or - icon beside a Proposal means that the Proposal has linked subawards. Clicking the + icon will reveal the linked subawards, and clicking the - icon will hide the linked subawards.

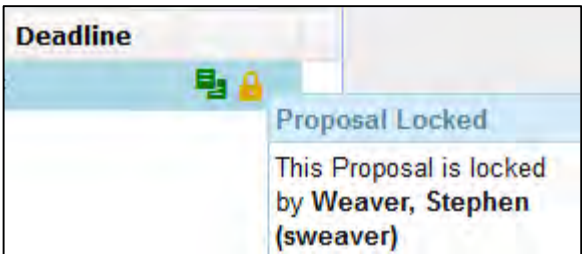
Opening a Proposal in Read-only Mode: If someone else is already working within the proposal, or if you don't have permission to edit it, the link will not be active. You'll need to open the proposal in read-only mode by clicking the **R** icon to the left of the proposal name.



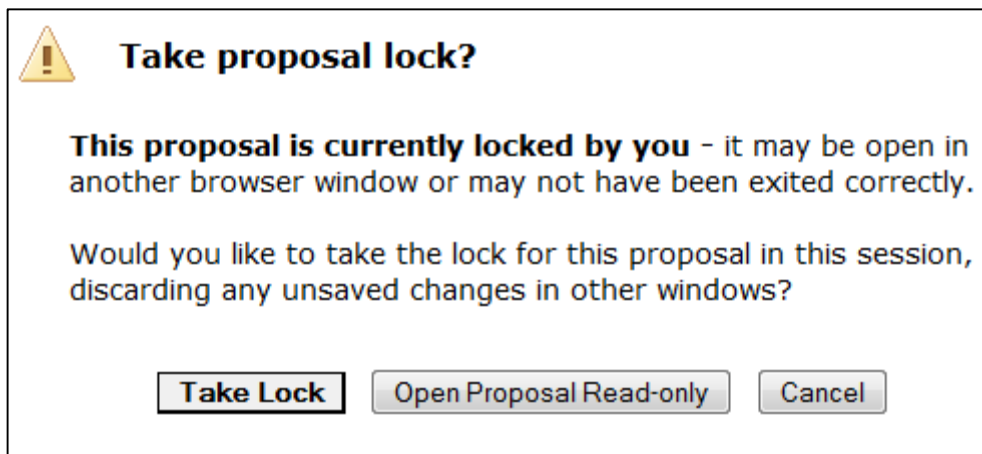
You can also use the **R** icon when you want to review the proposal, but do not need to edit it. This allows someone else to edit it while you have it open. If someone else is editing it, you will not automatically see the changes they make. You must exit and reopen the proposal to see any changes.

Unlocking a Proposal: While someone is working in a proposal, it is 'locked' so that no one else can make changes. While a proposal is locked, all of its linked subawards will be locked as well. This prevents other users from making changes to the subawards while the prime is open. The reverse applies as well. When someone is editing a linked subaward, this will lock the prime, preventing changes as long as the subaward is being edited.

To see who is currently working in the proposal when it is locked, look to the far right of the Proposals List. When you hover over the  icon, you'll see the name of the person currently editing the Proposal.

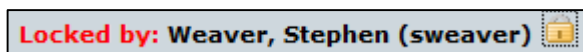


Taking the Lock: If you see your own name to the right of the lock, the proposal's link will still be active, and you can "take the lock" from yourself and continue editing the proposal. This can occur when you have the proposal open in two places, or if you were unable to exit Cayuse 424 by signing out in the normal manner.

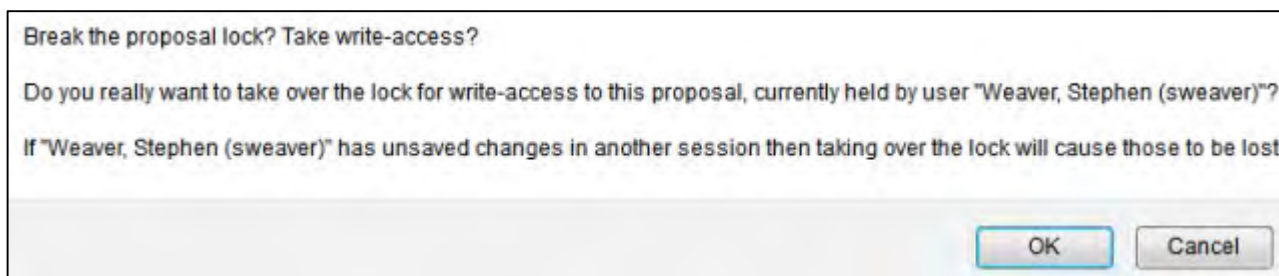


Taking the lock may cause you to lose any unsaved data. If you have the proposal open in another window or tab, be sure you have saved all your entered data.

Breaking the Lock: If you have the proper permissions, you can also take the lock from another user. This is called "breaking the lock." To break the lock and take control of a proposal, enter the proposal in read-only mode. Then, click on the lock located at the top of the page.




If you break the lock when another user is in the proposal, they will lose any changes made since they last saved. We recommend not taking the lock until you have confirmed with the current user that they have saved all their changes.



Sometimes a local Admin or one of our Support representatives will ask to "take the lock" from you. Make sure you save your changes before allowing someone else to take the lock.

Copying and Transforming

With Cayuse 424, you can quickly copy an entire proposal and edit the copy as needed. If you plan to resubmit a proposal, Cayuse recommends that you make a copy of the proposal first, and keep the original as a record of the first submission. You can also transform the proposal to a different opportunity, which preserves data from the original proposal where corresponding forms exist in the new opportunity package.

Both procedures start by clicking the  icon at the right side of the proposal to launch the Copy/Transform dialog.



Proposal Copy/Transform

Copy the current proposal, or "transform" it to a different Opportunity?


Copy Proposal

Transform Proposal


Cancel

Copying a Proposal

In the initial Copy/Transform Dialog, click **Copy Proposal**.
Edit the Proposal Name for the new proposal as desired.




Copy Proposal

Opportunity: PA-B1-R01 

NEW Proposal Name:
(For reference within Cayuse 424)

Copy Attachments? ☒

Due Date: 

Copy Proposal

Cancel


If you do not want to copy the attached documents, uncheck the **Copy Attachments** checkbox.
Click **Copy Proposal**.


Your new proposal will appear in the Proposals List.

Transforming a Proposal

If you want to instead transfer the existing data to a different opportunity, or even a new version of the same opportunity, transform the proposal. Once a proposal is created against an opportunity, if the opportunity is updated, the proposal does not automatically reflect the update (since forms may have changed) and must be transformed.

When you transform a proposal, information will only be copied between forms that are the same in each opportunity. If you are replacing an expired opportunity with a new one, the forms will generally be the same, but if it is a different opportunity, some forms may be different and that information will not transfer.







- 1. In the initial Copy/Transform Dialog, click **Transform Proposal**.
- 2. Select the new opportunity from the list by clicking on the green plus icon  to the left of the opportunity. This process is similar to [selecting an opportunity](#).

 **Transform Proposal...**

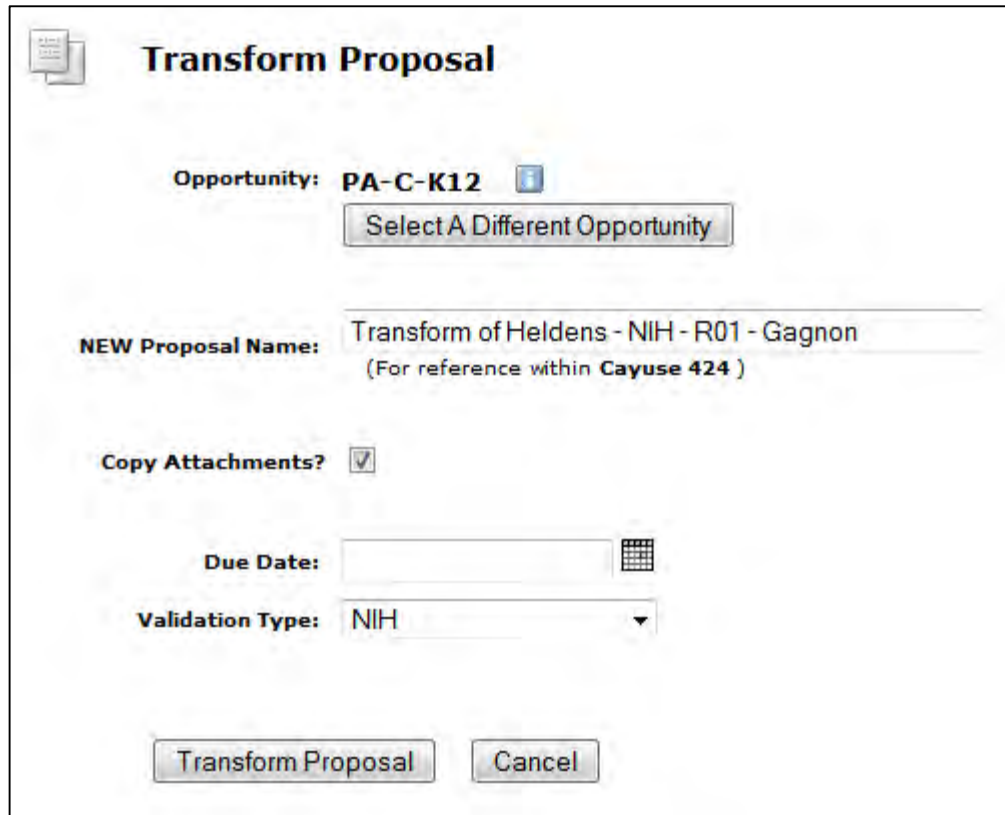
Proposal To Transform: "Transform of Support documentation Proposal"

Current Opportunity: PA-40-203

Select Opportunity

	Opportunity Number	Title	Comp. ID	Agency
 	EY-06-631	F31 RFA IC is null for FOA entered, ReUse for Renewal, get to awarded state	ADOBE-FORMS-B1	National Institutes of Health
 	PAS-06-631	F31 IC is null for FOA entered, ReUse for Renewal, get to awarded state	ADOBE-FORMS-B1	National Institutes of Health
 	OD12-041	SMALL BUSINESS ALZHEIMER'S DISEASE RESEARCH	ADOBE-B2	National Institutes of Health

3. Edit the Proposal Name for the new proposal as desired.



The image shows a 'Transform Proposal' dialog box. At the top left is a small icon of a document with a magnifying glass. The title 'Transform Proposal' is in bold. Below the title, the 'Opportunity' field is set to 'PA-C-K12' with an information icon to its right. A button labeled 'Select A Different Opportunity' is positioned below the opportunity field. The 'NEW Proposal Name' field contains the text 'Transform of Heldens - NIH - R01 - Gagnon' with a subtext '(For reference within Cayuse 424)'. Below this is a 'Copy Attachments?' checkbox which is checked. The 'Due Date' field is empty with a calendar icon to its right. The 'Validation Type' dropdown menu is set to 'NIH'. At the bottom are two buttons: 'Transform Proposal' and 'Cancel'.

4. If you do not want to copy the attached documents, uncheck the Copy Attachments checkbox.
5. Select the Validation Type if a different type is required.
6. Click **Transform Proposal**. Your new proposal will appear in the Proposals List.


Copy/Transform of Multi-Project Proposals

Multi-Project Proposals must be Copied/Transformed one component at a time. Selecting Copy/Transform on the Overall Component **will not** Copy/Transform the entire Proposal, just the Overall Component.

Additionally, Components and R01s can be transformed into Components for other Multi-Project Proposals. For more information on this process, please take a look at [Transforming Existing Components](#).

Deleting a Proposal

In Cayuse 424, the creator of a proposal is automatically granted the ability to delete it. Anyone who has been granted the delete permission for a proposal (see [Permissions](#)) can also delete that proposal. If the permissions on a proposal have been changed, the creator may not be able to delete it. To delete a proposal:

1. Open the Proposals List.
2. Look for the proposal in the list. If you don't see it, you can [search for it](#) or select **Show Recently Viewed** under the search box.
3. Click the  icon to the far right of the proposal. If you don't see this icon, you can't delete the proposal.
4. You'll see a message asking you to confirm that you really want to delete the proposal. If you are sure, click **Delete Proposal**. Otherwise, click **Cancel**.

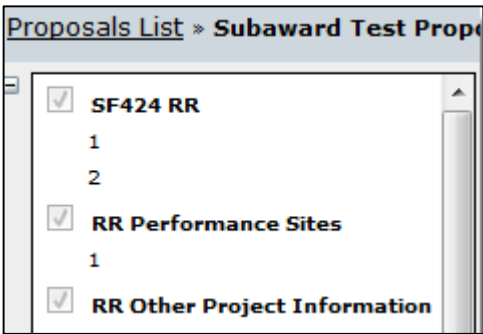
Even if you have permissions to delete a proposal, there are three reasons you may not see the delete icon:

- n The proposal is currently being edited. Proposals currently being edited cannot be deleted.
- n The proposal has linked subawards, or the subaward proposal is linked to a prime. You must [unlink](#) the subaward before you can delete the proposal or the subaward. You can delete a subaward during the unlinking process.
- n The proposal is paired with a Cayuse SP proposal. You will need to [un-pair the proposals](#) from the Cayuse SP side, then delete the Cayuse 424 proposal.

Deleted proposals are retained in the system until Permanent [Proposal Delete](#) occurs (or indefinitely if it is not active), but are no longer visible or editable. If you need to restore a mistakenly deleted proposal, request help from your local Cayuse 424 system administrators.

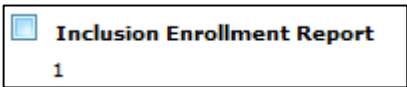
Navigating Your Proposal




When you start a new proposal in Cayuse 424, it assembles the required and optional forms for the funding opportunity you have selected. The forms are displayed in a list on the left side of the page. The selected form appears to the right of the list. Clicking the Proposals List link will return you to the Proposals List page.

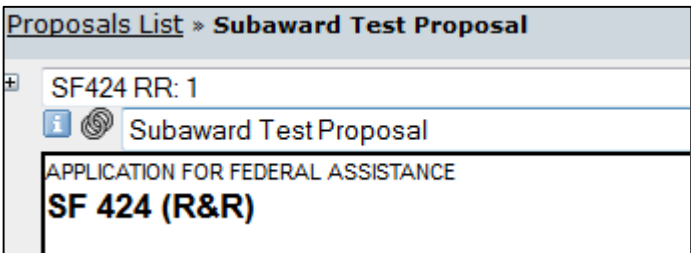


If one of the forms has a greyed-out checkbox beside it, that means that the form is mandatory to the submission of the Proposal. This form cannot be detached from a Proposal.

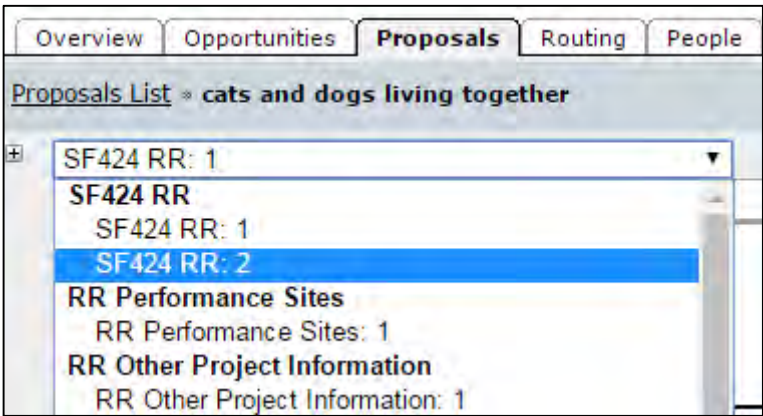
If a form has an enabled checkbox, then that means that the form is optional. Prior to submission, be sure that optional forms that you want to submit are selected.







At the top left of the list, there will be a  icon. Clicking this will cause the list to minimize, giving the full window to the currently selected form. It will also change the  icon into a  icon. Click the plus icon to bring back the list.

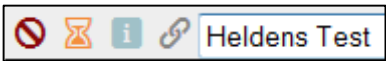



If you wish to navigate in this mode, click the dropdown menu at the top left of the page. This will allow you to select any of the forms in your proposal, while leaving the forms list collapsed.




Proposal Information

The Proposal title is located at the top of the Proposal. Left of the title, icon   will be there. A  icon will appear if the opportunity associated with the proposal has expired, and an  will appear if the opportunity has been archived.




Clicking the  icon will cause a window to appear containing some useful information, such as the Opportunity number, the internal Proposal ID and the Date Last Modified. Additionally, you can use this button to find out what browser and version you are using when talking with Cayuse Research Suite Support.

 **Proposal Information**

Subaward Test Proposal

Proposal ID	1001326350
Opportunity	PA-11-190
Current Form	SF424 RR (Version 1.2)
Form Page	1

The  icon will provide you with a direct link to the Proposal you are currently in. You can send this to colleagues and faculty who have permission to view the Proposal. This will allow them to easily access Proposals without having to navigate the Proposals List. You can also bookmark the Proposal for easy access in the future.


**Proposal Quick Link**
For proposal: Subaward Test Proposal




<http://iandemo.cayuse424.com/proposal.do?proposalId=1001326350>

To bookmark this proposal: Right-click the above URL, and select "Bookmark This Link..."

Done


Opening a Paired Cayuse SP Proposal

If your institution uses Cayuse SP, and the Cayuse 424 proposal is paired with a Cayuse SP proposal, you will see a pairing icon . Clicking this icon will bring you to the linked Cayuse SP Proposal.


 Linking during Creation


Autofill

When you [create a proposal](#), Cayuse 424 uses the information you provide to autofill institutional and personal information from the institution you select as the Organization and the person you select as the Principal Investigator. Autofill pulls data from a stored location into the proposal, where you can edit it manually or update it by re-autofilling.

There are several locations throughout the proposal where you can autofill stored data. Those locations are indicated by the  icon. Clicking this icon will bring up a selection dialog for a person, institution, or other type of stored data. The applicant organization information, administrative contact, Performance Sites, Key Persons, and other contact [fields](#) can generally be entered using autofill. This makes it easy to ensure that you have the correct information throughout the proposal.

Re-autofill

To re-autofill data that may have been updated since you began the Proposal, click on the  icon. This will overwrite any data that was previously autofilled into the proposal, as well as any data in the area that you may have entered manually.

**Re-autofill this Performance Site?**

Do you want to update the information about this Performance Site on this proposal with the latest data from the associated Professional Profile?

Note: this operation may overwrite data in the current proposal, and cannot be undone.

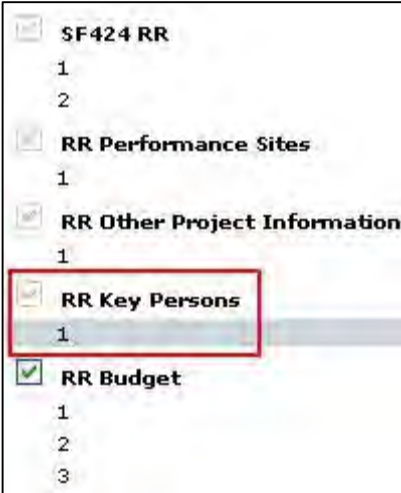
Re-Autofill Performance Site Cancel

When re-autofilling organizations using institutional profiles, be particularly aware that this action will refresh the indirect cost rates (see [My subawardee's indirect cost type isn't showing on my subaward. What can I do?](#)) and overwrite the Description field in F8-F10 of the RR Budget with the values from the [institutional profile](#). If you have budget values in F8-F10, be sure to check the Description after re-autofilling the institution.

Autofill depends on professional profiles being set up for the individuals, such as the PI and the Signing Official, and the organizations, such as the Performance Sites, that you are adding to the proposal. These profiles should be set up ahead of time if you wish to use Cayuse 424's autofill feature. See the [professional profiles](#), [Key Persons](#), and [institutional profiles](#) sections for more details.

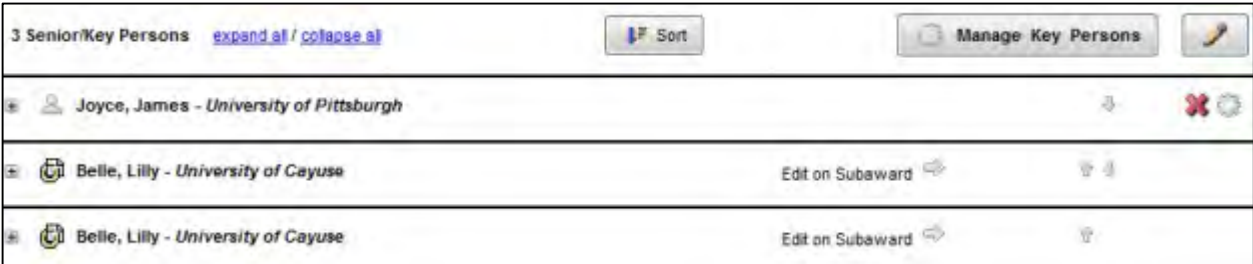
Key Persons


The Key Persons form displays the data for your proposal's Principal Investigator and associated Senior/Key Persons. You can edit their personal and budget details manually or using [autofill](#) and attach biosketches. You can also see data for Key Persons from your linked subawards.



Most proposals begin with a PI already assigned. If you have not assigned a PI, you can do so by clicking the pencil icon to the right of the PI slot, which will say **Unassigned** if there isn't currently a PI. This will allow you to [autofill the PI into the proposal](#).

Clicking **Expand All** or **Collapse All** will show all the information for listed Key Persons or hide all of that information, respectively. Clicking **Sort** will order Key Persons by PD/PI, Co-PD/PI, Alphabetical, Other Significant Contributor. You can also manually sort by clicking the up arrows ↑ and down arrows ↓ to the right of the Key Persons.



If you have existing personnel, you can view their details by clicking on the  icon to the left of each. If you have more than eight (40 for the expanded version) Key Persons, Cayuse 424 will automatically create PDF attachments for the additional Profiles as required by Grants.gov.

For Senior/Key Persons on the prime proposal, you can edit their information directly, or attach a Biosketch and a Current & Pending Support PDF.

NOTE: If the Key Person's address is outside of the United States or Canada, State/Province must be left blank.

Campo, Lawrence - University of Cayuse

Prefix

Dr.

* First Name

Lawrence

Middle Name

* Last Name

Campo

Suffix

DPhar

Position/Title

Professor

Department

Clinical Pharmacy

Organization Name

University of Cayuse

Division

School of Pharmacy

* Street1

10700 SW Beaverton-Hillsdale Hwy

Street2

Ste. 654

* City

Beaverton

County/Parish

Washington

* State/Province

Oregon

* Zip/Postal Code

97005-0001

* Country

United States of America

* Phone Number

503-297-2142

Fax Number

503-297-9045

* E-Mail

rsdemo@cayuse.com

Credential, e.g., agency login

lcampo

* Project Role

PD/PI

Other Project Role Category

Degree Type

Degree Year

* Attach Biographical Sketch

(no pdf)

(no src)

Add Attachment

Delete Attachment


Attach Current & Pending Support


(no pdf)

(no src)

Add Attachment

Delete Attachment

Clicking the  icon on a particular Key Person will prompt you to delete that Key Person from the Proposal. This will remove them the Proposal entirely, including any budget entries that they might have.



Remove Principal Investigator?


Really entirely remove the PI from this proposal?

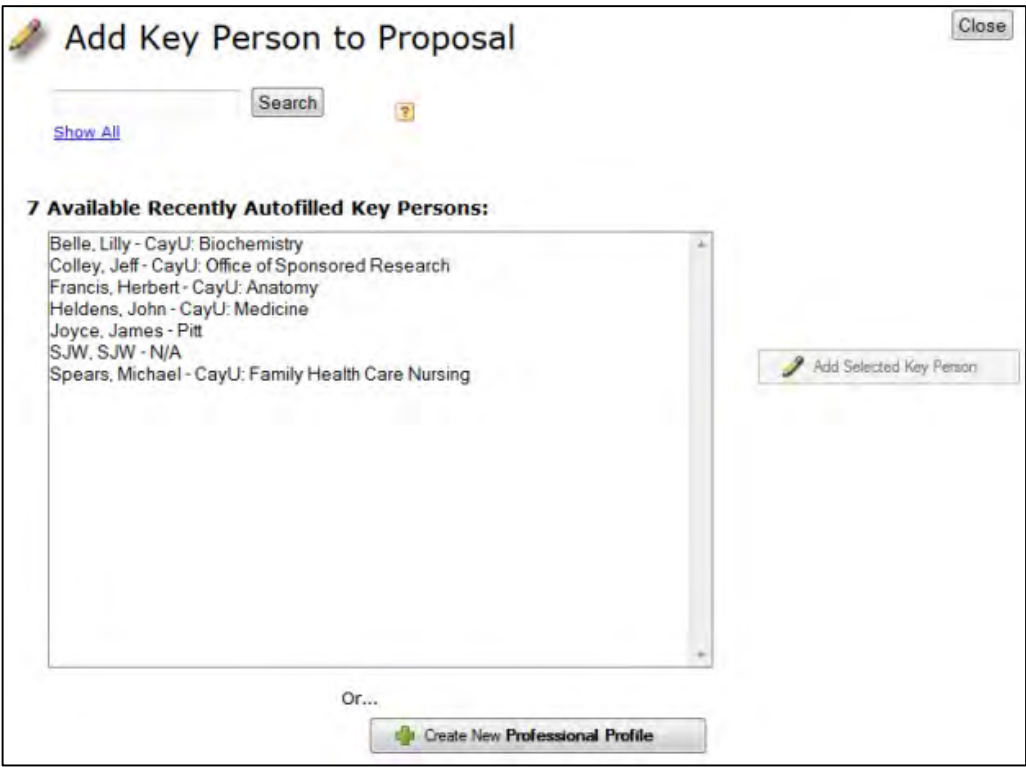
Delete

Cancel

To add new Senior/Key Persons, [autofill them into the proposal](#). You can change data for existing Key Persons by [managing the Key Person](#).

Adding Key Persons

To add Key Persons to your Proposal, either click on the  icon on the RR Key Persons form or click **Add Key Person** in the Manage Key Persons dialog.



The dialog shows a list of Key Persons available for autofill. By default, this list shows recently used Key Persons. To view all available Key Persons, select Show All under the Search box at the top left.

You can also search for Key Persons to autofill using their first name, last name, institutional association, or department. Once you've found the person you're looking for, select their profile and click **Add Selected Key Person**. You'll be taken back to the list of Key Persons and can edit your new Key Person there. When searching or using the Show All function, you can also filter by eRA Role. Just select the role you are looking for from eRA Role Filter dropdown at the top of the page.



When adding a Key Person, you will usually want to select Principal Investigator, as shown.

If you can't find the Key Person you want to add, then most likely the person doesn't yet have a professional profile, or you

don't have permission to use it. If you believe they do have a profile, contact your local administrator to get permission to use the profile.

If you're sure the person doesn't have a profile, click **Create New Professional Profile** at the bottom of the window. This will walk you through the creation of a professional profile (see [People](#)). Once you've finished creating the profile, it will autofill into the proposal and you'll be able to edit their information like any other Key Person.



Create Professional Profile

First name:

(required)

Middle name:

Last name:



(required)




Cancel

Create New Profile

If you attempt to create the profile and are warned that it may be a duplicate, consult your local administrator.

Managing Key Persons

Managing Individual: Clicking the  icon beside any Key Person brings up their data management screen, where you can manage the project role, appointment type, and budget data. (You can access the same screen through the person's entry in the [Budget form](#).) Clicking the  icon re-autofills their data from the linked Professional Profile. This replaces any data you've entered manually for the person. See [Key Person Budget Entries](#) for more information on editing this budget data.



Campo, Lawrence - University of Cayuse

Budget Periods: ☒ 1 ☒ 2 ☒ 3 ☒ 4 ☒ 5

☒ Include Performance Site

Attach Biosketch

(no pdf) (no src)

Add

Role:

PD/PI

Other Project Role Category:

Appointment type (months):

Calendar: 12.00

Academic:

Summer:

Budget	Cal. Salary	Acad. Salary	Sum. Salary	Cal. Months	Acad. Months	Sum. Months	Req. Salary	Fringe Benefits	Funds Requested
prd 1	100.157	0	0						
prd 2	100.157	0	0						
prd 3	100.157	0	0						
prd 4	100.157	0	0						
prd 5	100.157	0	0						

Managing All Key Persons: Clicking the **Manage Key Persons** button at the bottom of the list brings up the Manage Key Persons dialog for all personnel, including the PI, whose entry shows as gray rather than the green background of other Key Persons. This is convenient when you need to edit multiple Key Persons without opening each one individually.

At the top of the window, you can choose whether to sort by Alphabetical Order or Key Person Form Order.

Manage 4 Key Persons

Viewing in Key Person Form Order ▾
Close

Add Key Person



	Campo, Lawrence - University of Cayuse <input checked="" type="checkbox"/> Include Performance Site	Budget Periods: <input checked="" type="checkbox"/> 1 <input checked="" type="checkbox"/> 2 <input checked="" type="checkbox"/> 3 <input checked="" type="checkbox"/> 4 <input checked="" type="checkbox"/> 5
	Joyce, James - University of Pittsburgh	Budget Periods: <input checked="" type="checkbox"/> 1 <input checked="" type="checkbox"/> 2 <input checked="" type="checkbox"/> 3 <input checked="" type="checkbox"/> 4 <input checked="" type="checkbox"/> 5
	Belle, Lilly - University of Cayuse	Edit on Subaward ➡
	Belle, Lilly - University of Cayuse	Edit on Subaward ➡

Clicking the icon will take you to the Professional Profile that is linked to that Key Person. A icon that means they are a Key Person on the Subaward. Subaward Key Persons cannot be edited on the Prime Proposal. Clicking **Edit on Subaward** will move you into the associated Subaward, where you can then edit their information.

If you have a Key Person who is contributing no measurable effort, then you can use this management window to indicate their role as Other Significant Contributor. To do so, follow the instructions as listed in [How can I include a Key Person on an NIH proposal without giving them Effort and/or Salary on the Budget?](#)

Performance Sites

The Performance Sites form displays the information for all your proposal's performance sites. To access the Performance Sites from, select it from the [form list](#) on the left of the proposal.

When a proposal is first created, the primary performance site (Project/Performance Site Primary Location) will be filled out if you have selected a PI or an organization. All of the fields shown here are editable. Clicking the icon to the left of the organization name will take you to the entity the performance site is linked to. Clicking the  icon will prompt you to re-autofill the performance site information from the associated [institutional profile](#). This will replace any data you've changed in the proposal with data from the profile. Clicking the  icon beside any performance site removes that performance site from the proposal.

Project/Performance Site Primary Location

Organization: University of Cayuse

DUNS Number: 090993098

* Street1: 10700 SW Beaverton-Hillsdale Hwy.

Street2: Bldg. I, Ste. 700

* City: Beaverton

County/Parish: Washington

* State/Province: Oregon





* Zip/Postal Code: 97005-0001

* Country: United States of America

* Project/Performance Site Congressional District: OR-003

Other sites

[expand all / collapse all](#)

For other performance sites, you can see all the sites' information, or just the names, by using the **expand all** or **collapse all** links. You can also use the plus icon  to the left of the performance site's name to expand it, and minus  to collapse. To change the order that other performance sites appear in, click the up arrow icon  or down arrow icon  next to the site name.

Organization: University of Denver

DUNS Number: 012345678

* Street1: 3333 Colorado Street

Street2:

* City: Denver

County/Parish:

* State/Province: Colorado

* Zip/Postal Code: 8

* Country: United States of America



* Project/Performance Site Congressional District: CO-001


Organization: Virginia Polytechnic Institute and State University

You can [add other sites to your proposal](#) by clicking the pencil icon below the Primary Performance site.

Subaward Performance Sites

When you link a subaward to your prime proposal, you can add its performance sites to your prime's performance sites page. To do this, navigate to the Performance Sites form in the subaward, and click the checkmark beside **Include in Prime**.



Project/Performance Site Location(s)	
Project/Performance Site Primary Location	<input checked="" type="checkbox"/> Include in Prime 
<div>  Organization: University of Denver DUNS Number: 1110123450000 </div>	

By checking that box, the performance site will be added to the prime proposal. Clicking the  icon will take you back to the prime, where you'll see the subaward performance site listed.




After including a subaward performance site in the prime proposal, you will see the words **Edit in Subaward** to the right of the performance site in the prime. Clicking that link will take you directly to the subaward, where you can edit the information for that performance site.



Adding Performance Sites

Usually, a primary Performance Site is added to the proposal during creation based on the PI's affiliation or the Organization selection.

If you've already added a primary Performance Site, to add additional Performance Sites to the list, click the  icon on the right below the primary Performance Site. To add a primary Performance Site, click the  at the top right of the form. The forms are similar except that the Primary Performance Site form only allows you to add one site, and suggests likely sites automatically.


Other Performance Site Autofill
<input checked="" type="checkbox"/> Also show available Institutional Profiles
Select a Performance Site or <input type="button" value="Hand-Enter a Performance Site"/>
<div> Georgia Health Sciences University - Institutional Profile Oregon State University - Institutional Profile Swarthmore College - Institutional Profile The University of Tennessee Health Science Center - UTHSC - Institutional Profile University of California, Merced - UC Merced - Institutional Profile University of Tennessee, Institute of Agriculture - UT Institute of Agriculture - Institutional Profile University of Tennessee, Knoxville - UT Knoxville - Institutional Profile Utah State University - Institutional Profile Villanova University - Institutional Profile Virginia Polytechnic Institute and State University - Virginia Tech - Institutional Profile Weill Cornell Medical College - Institutional Profile </div>

If you already have some performance sites, you'll see a list of sites that are already associated with the Proposal, and how they are associated with it: by Key Person () , by Subaward (), or by Institutional Profile ().

Project/Performance Site Location(s)	
Project/Performance Site Primary Location	
<div>  Organization: University of Wattsamatta DUNS Number: 123456789 * Street1: 123 Test St * City: North Pole * State/Province: Alaska * Country: United States of America * Project/Performance Site Congressional District: AK-011 </div>	Street2: County/Parish: * Zip/Postal Code: 99705-00
Other sites expand all / collapse all	
<div>  Organization: Evisions DUNS Number: 123456789 * Street1: 2525 1st St </div>	Street2:

Clicking **Also show available Institutional Profiles** at the top of the page, as has been done in the screenshot above, will show all the Institutional Profiles available to add. Performance Sites that are already associated with the proposal will have a green background. Clicking the checkbox to the left of an Institution will add its location as a Performance Site to the Proposal. Clicking one of the icons will take you to the linked entity (Person, Subaward, or Institutional Profile).

You can also manually enter a Performance Site under Other Performance Sites by clicking the **Hand-enter a Performance Site** button at the top of the page. This will prompt you to enter all the location information you would normally enter into an Institutional Profile. When finished, just click **Add Performance Site to Proposal** and you will see it listed along with the other Performance Sites.



Hand Enter Performance Site

* Name:

Congressional District:

DUNS Number:

Street1:

Street2:

City:

County:

State/Province:

Please Select...


Zip/Postal Code:

Country:

Please Select...

Add Performance Site To Proposal

Cancel

Hand entered Performance Sites are designated by the  icon. This does not create an Institutional Profile; it only enters the data into this proposal.


When you're finished, close the Performance Site Autofill window. You can edit Performance Sites on the form as necessary once you have added them.


Budget

As in other sections of the proposal, Cayuse 424 presents you with the budget form that the opportunity has provided, and you can fill it out as you normally would. There are also many features such as autofill, [automated calculations](#), [budget period replication/escalation](#), and [indirect cost rate selections](#) to make the process of creating proposal budgets faster and more accurate.

Although Cayuse 424 automates much of the number crunching and validates the proposal as you work, always make sure to follow the instructions specific to your funding opportunity.

Budget Period Editor

The dates for your project periods must be entered in many places across the proposal. In any project period date field, you can use the Budget Period Editor to manage your project dates. Click the  icon to open the Budget Period Editor.




Manage Budget Periods

Copy dates from another proposal...

Number of periods: ☐ 1 ☐ 2 ☐ 3 ☒ 4 ☐ 5

Period length:

	Start Date		End Date
1	<input type="text"/>		<input type="text"/>
2	<input type="text"/>		<input type="text"/>
3	<input type="text"/>		<input type="text"/>
4	<input type="text"/>		<input type="text"/>

Update Periods

Cancel

You can select the number of periods, up to the number allowed by the form included in your opportunity package, or 10 for Other proposals. Usually the Period length is 1 year, but if you need a different period length, you can select 3 months, 6 months, or even create a custom period.

With a pre-selected period, all the dates will populate once you select the start date and the number of periods. If you have a custom period, you must select each period's start and end date manually.

- Click **Update Periods** to apply the changes.
- You can also use this to copy budget periods from another proposal, if you know you have a proposal with the same budget periods, by using **Copy dates from another proposal...**

If you are in a prime proposal that has a linked subaward, the following message will show:

- **Note:** Changes to dates and periods apply the same changes to linked subawards. If we have a subaward IDC rate schedule, budgets are recalculated upon subaward open.

Using the budget period editor automatically applies the changes to the period to linked subawards, to ensure that everything stays in sync. If the subawards also have an assigned IDC rate, budget calculations will automatically adjust to the new period selection the next time the subaward is opened.

Modular Budgets

Most opportunities require a detailed budget that provides specific information on the allocation of the budget to different categories of spending. However, NIH opportunities may also provide a Modular Budget form (PHS 398 Modular Budget) for proposals with up to \$250,000 in direct costs (less Consortium F&A) for certain mechanisms. More information can be found on NIH's [Modular Research Grant Applications page](#).

In Cayuse 424, opportunity packages with a modular budget will also have a detailed budget attached. Both budgets will be labeled optional, but you must select one to submit.

Although the modular budget is a replacement for the detailed budget at NIH, you may need to prepare a detailed budget for yourself or your institution's research office. In Cayuse 424, you can fill out the detailed budget, which includes many helpful calculation tools, and the numbers will automatically flow into the modular budget form. If this is not necessary, you can also manually calculate and enter the modular budget figures directly into the modular budget form. Be sure to separate out any Subaward Indirect Costs and enter them in the appropriate field.

You cannot submit detailed Subaward budgets with a Modular budget. If you check the subaward inclusion checkbox when you are using a modular budget, Cayuse 424 will display an error:

Error: [Subawards][NIH] A Subaward Budget Attachment Form may not be included if a modular budget has been submitted. (uncheck one of the inclusion checkboxes)

Proposals using a modular budget usually have a certain dollar amount introduced by the rounding up process from the actual to the module. If a local administrator has configured a default rate for Modular Budget Rounded Direct Costs in the [Institutional Profile](#), at the bottom of the Indirect Costs section, Cayuse 424 can automatically apply an indirect cost rate to this amount.

Automated Calculations

As you enter budget data in each budget period and category, Cayuse 424 takes the raw numbers you enter and creates subtotals and cumulative totals, and automatically fills those numbers and calculations into the appropriate fields on all applicable pages.

In general, to take greatest advantage of the automated calculations, you should start filling out the budget from the top, and only fill in totals where they don't automatically appear.

Calculated Fields

A [calculated field](#) derives its information from other fields where values have been entered directly, or from a calculation performed within the field on the entered value. Values in these fields are automatically calculated while you are filling in the form and are recalculated each time you enter data into a related field. In many calculated fields, you are permitted to overwrite the calculated values. In those fields where overwriting is permitted, a red star appears next to the field indicating that you have over-written it.

Base	Cal.	Acad.	Sum.	Cal.	Acad.	Sum.	Requested	Fringe
Salary (\$)	Salary (\$)	Salary (\$)	Salary (\$)	Mons	Mons	Mons	Salary (\$)	Benefits (\$)
100,157	100,157	0	0	5,000			45,000	13,500
								58,500

Caution: If you overwrite a calculated field, the information in that field will not be updated when you change the

information in other, related fields. This can cause your final values to be wrong! Use caution when overwriting calculated fields.

To return a field with a red star to its normal, calculated value, simply remove the number you have manually entered in the field. The calculated value will reappear.

If you are having trouble with errors that are resulting from out-of-date automated calculations, running [Final Review](#) checks all forms and fields for errors, and will update any calculated fields that have not been manually overwritten with an up-to-date value.

Percentage and Currency Fields


Most percentage and currency fields in the budget only allow entering numbers Percentages must be entered as decimal numbers (e.g. 45.5 or 4.5). Dollar amounts should be entered as numbers, and will round to the nearest dollar. To see \$10.00, enter 10. If you enter 10.99, you will see 11 in the field.

In certain places, there are special fields which will accept either dollar amounts or percentages, such as the effort fields (Calendar, Academic, and Summer Months) and the Fringe Benefits field. In these fields, enter a plain number to get a dollar amount: entering 63.5 would yield \$64. Enter a percentage to see the dollar amount calculated based on the percentage. Entering 63.5% in the Fringe Benefits field displays a dollar amount equal to 63.5% of the Requested Salary.

Escalation and Replication


A common problem in creating budgets is that you have to enter the same or similar information across all your project budget periods. Cayuse 424 makes it easy to copy and even automatically escalate rates in your detailed budgets based on expected future cost increases.


- **Replicate** copies budget numbers on selected line items from one budget period to another.
- **Escalate** increases budget line items by a specific percentage across several budget periods.

Click on the  icon to bring up the dialog.

RESEARCH & RELATED BUDGET - SECTION A & B

Budget Period 1 of 4





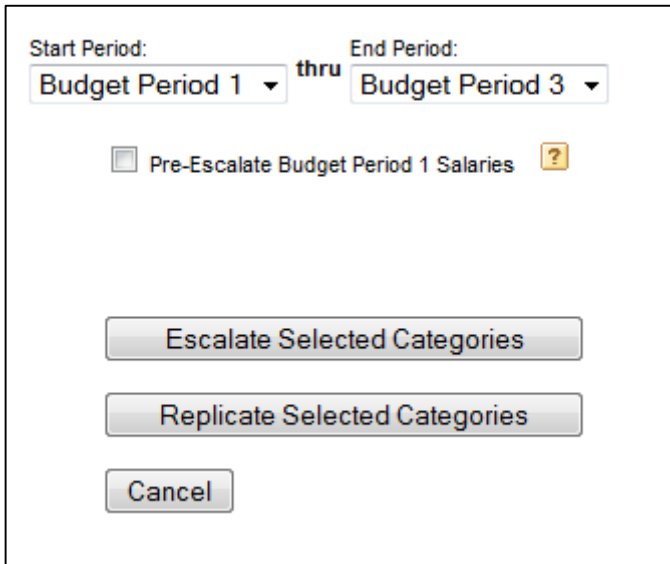
Budget Replication or Escalation

Enabled	Budget Category to Escalate/Replicate	Rate (%)
<input checked="" type="checkbox"/>	A.) Senior/Key Persons	<input type="text" value="3.0"/>
<input type="checkbox"/>	B.) Other Personnel - Salary	<input type="text" value="3.0"/>


You'll first see the current escalation rates for different budget categories. These are set in the [institutional profile](#) by an Admin, but you can change them within the proposal if necessary to meet your needs. Click the box next to a

category to enable escalation for that category. You can select any or all categories; there is a select all link at the bottom of the rate list so you can quickly select all the categories.


To the right you see the options for replication or escalation.



The screenshot shows a dialog box with the following elements:

- Start Period:** A dropdown menu with "Budget Period 1" selected.
- thru**: A text label between the start and end period dropdowns.
- End Period:** A dropdown menu with "Budget Period 3" selected.
- ☐ **Pre-Escalate Budget Period 1 Salaries** 
- Escalate Selected Categories** (button)
- Replicate Selected Categories** (button)
- Cancel** (button)

You can choose which budget periods the escalation will impact. Under **Start Period**, select the budget period you want the replication/escalation to start from. Under **End Period**, select the budget period you would like the escalation/replication to inclusively end on.

Selecting **Pre-Escalate Budget Period 1 Salaries** (only enabled when Budget Period 1 is the Start Period) will escalate Budget Period 1 as well, which is not escalated by default. This is useful if Period 1 is in the future and cost increases are expected before the beginning of the period. Click the  icon for a more detailed explanation of this functionality.

Let's say, as in the image above, Budget Period 1 is selected as the Start Period, and Budget Period 3 is selected as the End Period. Clicking **Escalate Selected Categories** would take the numbers in the selected categories from Budget Period 1, and escalate them through Budget Periods 2 and 3 according to the Budget Categories selected. Clicking **Replicate Selected Categories** would take the numbers in the selected categories from Budget Period 1 and copy them into Budget Periods 2 and 3.

Replication and Escalation also affect the [indirect cost rate selections](#). If you change the indirect cost type and then replicate, the indirect cost rate selection will also be replicated in outlying years.

You can also replicate and escalate budgets in the [budget sections of the Manage Key Persons dialog](#).

Indirect Cost (IDC) Rates

Indirect cost (IDC) rates are set up in the [institutional profile](#) for the organization [by an Administrator](#). When you create a new proposal, you are given the option to set your Default IDC Rate after selecting your organization, as shown below.

Create Grants.gov Proposal

Opportunity: PAR-C-R34

Select A Different Opportunity

Proposal Name:

?

Search for PI

Showing recent PIs

Show all

Principal Investigator:

Adamson, Adam Chloe (Anatomy) / University of Cayuse

Amyson, Amy Cooper (Anesthesia and Perioperative) / University of Cayuse

W, Stephen () / Apricot College

Organization:

University of Cayuse

Default IDC Rate:

Please select..

of Budget periods:

1

2

3

4

5

Due Date:

Validation Type:

NIH

Create Proposal

Cancel

Once the proposal is created, the IDC rate you selected will be applied to the budget items where the [institutional profile](#) assigns the Selected Default Rate. If you ever need to change this selected base default rate, you can re-autofill the organization at the top of any budget form page in Cayuse 424, resulting in the following screen.

Applicant Organization Autofill

Organization:

University of Cayuse

Default IDC Rate:

Please select..

Note:

Autofill of the Organization will replace, if in use:

EIN

DUNs number

Indirect Cost Type Names, Rates, & default choices

Escalation Rate Defaults

Type of Applicant

Applicant Organization Contact Information

Autofill Applicant Organization

Cancel

Note that even if you only want to update the IDC rates, you will replace all information that has been modified within the proposal with the default information from the institutional profile, including the descriptions for items F8-F10 of the RR Budget.

In the proposal, the default rates can be overridden by choosing different rates from the dropdown menu for each budget category. The totals for each rate are summarized in Section H of the RR Budget.

Key Person Budget Entries

You can access the budget entries for Key Persons from the Budget form or from the Key Persons form by using the **Manage Key Persons** button. The appropriate information from this dialog will flow into each form.

Appointment Type

When you are in the Manage Key Persons dialog, you'll see the person's Appointment Type as well as salary and fringe information for each budget period.

Campo, Lawrence - University of Cayuse

Budget Periods: 1 2 3 4 5

☒ Include Performance Site

Attach Biosketch (no pdf) (no src) Add

Role: PD/PI Other Project Role Category:

Appointment type (months): Calendar: 12.00 Academic: Summer:

Budget	Cal. Salary	Acad. Salary	Sum. Salary	Cal. Months	Acad. Months	Sum. Months	Req. Salary	Fringe Benefits	Funds Requested
prd 1	100,157	0	0						
prd 2	100,157	0	0						
prd 3	100,157	0	0						
prd 4	100,157	0	0						
prd 5	100,157	0	0						

The entries in the **Appointment type** fields determine which salary fields are available. Here, the PI, Campo, has a 12-month calendar appointment. The Calendar Salary and Calendar Months fields are enabled, while the corresponding Academic and Summer fields are disabled, because Campo does not have an Academic/Summer appointment type. If you need to change the Appointment Type, it's best to do so in the person's [Professional Profile](#) and re-[autofill](#) the data to the budget using the refresh arrows, or you may end up with numbers you can't edit.

Effort and Salary Calculations

To determine the requested salary, you can use the person's base salary as entered in the **Cal. Salary** or **Acad. and Sum. Salary** fields along with an effort entry in the **Months** field. For our PI, Campo, we can enter 3 in the **Cal. Months** field.


Budget	Cal. Salary	Acad. Salary	Sum. Salary	Cal. Months	Acad. Months	Sum. Months	Req. Salary	Fringe Benefits	Funds Requested
prd 1	100,157	0	0	3.000			25,039	15,023	40,062


This automatically populates the requested salary with the correct amount based on the effort. If the person has Fringe Benefits entered in their profile, these will also be calculated and added to the total in Funds Requested.


If you've calculated your effort in percentages rather than directly in person-months, instead of 3 you could enter 25%. This will immediately be converted to the correct number of person-months (using the total appointment duration as 100%) and the salary will be calculated as well.

If you attempt to enter values that are too large, you'll see an error message. Enter the correct number or percentage to correct the error.

Key Person Budget Escalation

To arrive at the correct requested salary for all budget periods, you can type in the numbers manually, but you can also use the Budget Escalation tool for Key Persons. Clicking the  icon to the left of the budget data opens the **Key Person Budget Escalation** dialog, where you can either simply copy the information across all periods, or escalate the budget for the Key Person over multiple budget periods based on expected increases in compensation. You can choose the rate of escalation and which budget periods the escalation will impact.


Pre-Escalate Budget Period 1 Salaries will escalate Budget Period 1, which is not escalated by default. Click on the  icon for a more detailed explanation of this functionality.



Key Person Budget Escalation

Senior / Key Persons Rate %

Start Period: thru End Period:

☐ Pre-Escalate Budget Period 1 Salaries 

Escalate Key Person Over Selected Budget Periods

Replicate Key Person Without Escalation

Cancel

Selecting **Escalate Key Person Over Selected Budget Periods** will perform the escalation. Selecting **Replicate Key Person Without Escalation** will copy the same base salary across all the selected periods.

Budget Continuation Pages

For some proposals, the space provided on the detailed budget pages for **Senior/Key Persons** and **Equipment** is insufficient to include all the necessary entries. To address this issue, we've added the ability to enter an arbitrary number of line items. If you exceed eight Key Persons (40 for the expanded version) or 10 Equipment items, Cayuse 424 will generate and attach pre-formatted continuation pages which contain the overflow data. The total will reflect all the line items.

Attachments

Cayuse 424 allows you to attach PDF documents to your proposal to provide important supporting information for your submission. You can also upload the original format of the file, if there is one, to facilitate making changes to the file later. These source files will not be submitted.

Attaching a PDF Document: Each area where a file can be attached to a proposal form in Cayuse 424 will show the name of the attachment point on the left, and show two buttons on the right: **Add** and **Delete**. **Delete** will be disabled unless an attachment has been added.

18. SFLLL or other Explanatory Documentation

(no pdf) (no src)

Add

Delete

To add an attachment:

1. Click **Add** to launch the Upload Attachment dialog.



Upload attachment

After uploading, please view the uploaded attachment to verify its correctness.

Name: SfillOrOtherExplanation

PDF file:

Browse_

 No file selected.

Source of PDF: (optional)

Browse_

 No file selected.

Upload

Cancel

Note that the default attachment name is based on the attachment point.

2. Click the first **Browse** button to select the PDF file. Browse for and select the file you want to attach from your computer, drive, or network.
3. If you want to add a source file as well, click the second **Browse** button and find the source file to include.
4. If you need to change the name of the attachment (for example, if agency policy requires a particular attachment name), edit the text in the Name field.
5. Click **Upload**.
6. The document(s) will be uploaded, and you'll see links you can click on to review them. Click **pdf** to view the PDF, and click **src** to view the source file.

Facilities pdf src <input type="button" value="Add"/> <input type="button" value="Delete"/>

Cayuse recommends reviewing attachments after upload to ensure the upload completed successfully.

Clicking **Delete** will remove both files. If you want to replace just one file, just select **Add** again and upload a new document in place of the existing one.

File Formats: Cayuse 424 can submit only PDF documents as attachments. You can upload and attach a source file for your records, but only the attached PDFs will be submitted. PDF files containing active form fields cannot be uploaded, to avoid errors when the proposal is submitted through Grants.gov. See [Grants.gov and Agency PDF Requirements](#) for information on creating PDFs, 'flattening' PDFs, and meeting other Grants.gov and agency requirements.

What if my opportunity specifies a non-PDF format?

Agencies will sometimes request documents in other formats, or even request active PDF forms. In many cases, they will accept a flat PDF version of the file containing the relevant information, as long as the original file can be provided on request. In these cases, Cayuse recommends submitting the PDF via Cayuse 424 and including the source file in the proposal for later use. The source file will not be submitted directly to the agency, but can be sent separately if needed.

In rare cases, an agency may require submission in another document format. While normal users will be unable to upload non-PDF attachments, a local System Administrator can upload non-PDF attachments by following the [Attaching Non-PDF Files](#) guide.

If the agency is requesting submission of a PDF but requires that it contain active form fields, contact your local administrator to help you with that process, or [contact Support](#).

Attaching Biosketches

Biosketches are usually uploaded and attached to Professional Profiles as described in [Managing Personal Information](#). However, they can also be attached directly to proposals, as with any other proposal document.

Attaching Letters of Support

You may upload Letters of Support to the Research Plan page and check the inclusion box. If you have separate PDFs of several letters of support, click **Append**. Cayuse 424 adds the appended PDFs on to the existing PDF. This avoids any issues with bundling.

12. Letters of Support	(no pdf) (no src)	<input type="button" value="Add"/>	<input type="button" value="Append"/>	<input type="button" value="Delete"/>
------------------------	-------------------	------------------------------------	---------------------------------------	---------------------------------------

Appendices

You may attach up to ten PDFs in this section; although, if you are submitting a proposal to NIH, you should follow the new guidelines regarding the content of the appendices.

Appendix (if applicable) 14. Appendix	1.	(no pdf) (no src)	<input type="button" value="Add"/>	<input type="button" value="Remove"/>
--	----	-------------------	------------------------------------	---------------------------------------

Grants.gov and Agency PDF requirements

Both Grants.gov and certain agencies, particularly NIH, have guidelines for attachment format and certain PDF-specific requirements. Cayuse recommends complying with Grants.gov and agency guidelines whenever possible, and always verifying the content of your proposal after submission to ensure that it was transmitted correctly.

Creating PDFs

If you need to create a PDF from another document (including creating 'flat' PDFs from PDFs with active fields), you can use a PDF creation utility, either a standalone program such as those [recommended by Grants.gov](#), or built-in features such as the "Save as PDF" feature in Mac OS X and in Microsoft Word 2007 and later. If you are using a standalone program, simply printing the document to PDF again after opening it in the program is usually enough to flatten active fields as well as comments and stamps (see below).

Cayuse 424 will automatically change special characters (such as &, -, *, %, /, #, periods, spaces, and accented characters) in PDF file names to underscores, so no alterations should be required. Attachment names should be no longer than fifty (50) characters.

Note: When attaching a document, be sure that you do not attach a blank document by mistake.

NIH (eRA Commons) PDF Requirements

In addition to the requirements for submission through Grants.gov, the NIH has extensive [recommendations for successful PDF submission](#). Cayuse suggests that you pay special attention to Guidelines 2, 3, 6 and 7:

- Avoid bundling multiple PDFs into a single file. For instructions on attaching Letters of Support, see below.
- Avoid producing PDFs by scanning printed documents. Use recommended PDF creation software instead.
- Disable any security features such as encryption or password requirements.
- Do not attach PDFs that contain "stamps" (commonly used for signatures) or other comments. Such PDFs may not be correctly transmitted to the eRA Commons, or may cause errors in other attached documents.

The NIH also requires special preparation for the Research Plan attachment. Cayuse 424 provides a tool to make this preparation easier by allowing a single document to be "exploded" into individual sections during the attachment process. See [Preparing the Research Plan](#) for more information.

Preparing the Research Plan for NIH Proposals

Unlike other Agencies, NIH requires that the research plan be submitted as separate PDF files, each containing specific document sections.

Cayuse 424 gives you the option to upload each section separately, or upload a composite PDF containing all of the required sections. If you would like to upload a composite PDF, format the research plan as described below. The following section contains instructions on how to attach a composite Research Plan document and use Cayuse 424 to separate each section of the document into individual PDFs, as required by NIH. To create a Research Plan with consistent styles, footnotes, and bibliography, NIH recommends preparing it as a single document.

The exact procedure you follow to generate your PDF depends on your word processor, operating system, and PDF generation capabilities. Using your PDF creation tool, create a single PDF containing:

- section headings that follow the NIH naming conventions
- Page breaks at the section headings
- No page headers or footers

While the standard page limits for the Research Plan are still in effect, NIH realizes that splitting the Research Plan into these several PDFs can result in the total number of PDF pages exceeding the opportunity page limit. ***This is acceptable to NIH but you are strictly limited in the amount of text!***

Note: Save a Word Document as PDF


- **Windows:** In Word 2010 and later, click Save As and set the file type to PDF to save the document as a PDF.
 - If you are using Word 2007 you can [download and install](#) the "Save As PDF" feature from Microsoft and use it to generate your PDF.
 - Alternately, you can use Adobe Acrobat to produce the PDFs, if you have it. Other options include [CutePDF Writer](#) (freeware) and other technologies mentioned by [Grants.gov](#).
- **Macintosh OS X:** In OS X you can use the <Save as PDF> button on the print dialog to generate a PDF. Because the "Exploder" upload software now adds bookmarks to the PDFs, you do not need to use the "Add Bookmarks" utility.

Attaching the Research Plan

Cayuse 424 has a special tool built into the Research Plan page, called the "Exploder." The Cayuse 424 Exploder expects a single PDF file with the required section headings and page breaks. As with the Biosketch PDFs, the PDF must omit header and footer information, complying with NIH requirements.

In Cayuse 424, the Exploder:

- allows you to upload a single PDF,
- "explodes" the PDF into sections,
- attaches each section to the correct location in the proposal.

2. Research Plan Attachments:		
Please attach applicable sections of the research plan, below.		
0. Composite PDF. 	ResearchStrategy pdf (no src)	<input type="button" value="Add"/> <input type="button" value="Delete"/>
1. Introduction to Application (for RESUBMISSION or REVISION only)	2_Summary_Abstract_rasMAPK pdf (no src)	<input type="button" value="Add"/> <input type="button" value="Delete"/>
2. Specific Aims	SPECIFIC AIMS pdf (no src)	<input type="button" value="Add"/> <input type="button" value="Delete"/>
3. * Research Strategy	ResearchStrategy pdf (no src)	<input type="button" value="Add"/> <input type="button" value="Delete"/>

To attach and automatically explode the Research Plan:

1. Go to the Research Plan page
2. Click **Add** next to the "0. Composite PDF" field.
3. Browse to and select the PDF file, and, if desired, the source file. You may upload both the PDF and the original word processing document if you wish. Only the PDF is submitted with the proposal, but the source document can be uploaded for safekeeping and subsequent revision.

Upload attachment		
Name: (required)	<input type="text" value="Demo"/>	
PDF file: (required)	<input type="text" value="v8_TimeTravel.pdf"/>	<input type="button" value="Browse.."/>
Source of PDF: (optional)	<input type="text" value="v8_TimeTravel.doc"/>	<input type="button" value="Browse.."/>
<input type="button" value="Upload"/>		

If you upload a properly formatted Research Plan, the Cayuse 424 Exploder will:

- add PDF bookmarks, which mark the start of each top-level section
- display a Feedback window listing the found section headers
- attach known sections on the Research Plan Page
- attach the Bibliography on the Other Project Information Page
- attach the Commercialization Plan on the SBIR Page (when appropriate)

You may upload the PDF as many times as you need to, but be aware that each upload overwrites the previous uploaded PDF and the attached sections derived from it. The Targeted/Planned Enrollment, Inclusion Enrollment, Letters of Support, and the Appendix are not affected by multiple uploads.

Validations

Cayuse 424 validates each proposal against the published funding opportunity rules, Grants.gov schema requirements, and other agency-specific rules.

The validation messages you see depend on the validation type that is selected. Usually Cayuse 424 will select the correct validation type for you, but if you need to change it, see [Choosing a Validation Type](#).

The current tally of errors, warnings, and info tips is shown on the **Error/Warning/Info** button at the bottom of the proposal next to the validation type selection. Click the **Error/Warning/Info** button to display the list.

12. PROPOSED PROJECT:
Start Date: 01/01/2017
Ending Date: 12/31/2021

13. CONGRESSIONAL DISTRICT OF:
Applicant: OR-003

14. PROJECT DIRECTOR/PRINCIPAL INVESTIGATOR CONTACT INFORMATION

Prefix: Dr
First Name: Jennifer
Middle Name:
Last Name: Ametoad
Suffix: PhD

Error (41) / Warning (5) / Info (1) NIH

Final Review

Error: [SF424rr 2.16][NIH] Select the [PROGRAM IS NOT COVERED BY E.O. 12372](#) radio button

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

The format of the validation issues is follows:

- **Type of Issue:** [Location of Issue][Agency] Issue description.

The location of the issue indicates the form where the issue is. If the issue is agency-specific, the agency name appears in the second set of square brackets. Otherwise, the issue is a Grants.gov validation issue that applies across all agencies. If the description contains a blue link, you can click on the link to be taken directly to the location of the issue.

If [Cayuse] appears in the second set of square brackets, the validation issue represents general best practices in grant creation. Most Cayuse validations are info tips.

Errors

Errors indicate serious issues that may prevent successful submission to Grants.gov or acceptance by the agency, usually involving required questions, fields, or attachments; or they may indicate inconsistencies between different parts of the proposal.

Error: [Subawards][Cayuse] Subaward [Copy of Copy of Copy of test21](#) may have [errors](#). Please navigate to the subaward proposal to automatically update this.

Error: [Cover Page Supplement 1.3] Applicant Organization Contact's [Title](#) is required

Error: [Cover Page Supplement 2.4] Answer [HESC involved](#) question

Error: [Research Plan 2.2][NIH] The [Specific Aims](#) attachment is required

Resolving errors before submission is generally very important since they can prevent successful submission. In particular, errors with no agency name will prevent successful submission of the proposal to Grants.gov, and must be resolved prior to submission. However, if your opportunity instructions are different from the validation requirements you are seeing, consult the Knowledge Base article entitled [I'm getting errors or warnings at the bottom of my screen that contradict my opportunity instructions.](#)

Warnings

Warning: [Other Project Info 11][Cayuse] The Equipment Attachment is missing. Is this intentional?
Warning: [Budget K, BJ][Cayuse] A Budget Justification is missing. Is this your intention?

Warnings are recommendations that will not stop submission, but remind you about potentially important items to include or issues to resolve. Warnings highlight situations that may cause problems when your proposal arrives at the agency. In most cases, we suggest that you follow the warnings given by Cayuse 424, but if your opportunity has different requirements, follow the instructions provided for your opportunity.

Info

Info: [PHS 398 Cover Letter][Cayuse] Cover Letter is often recommended.
--

Info tips are reminders that specifically target best practices. Their goal is to make sure your proposal has all the elements desired, such as cover letters and other optional attachments. Disregarding info tips will not usually cause serious issues, but you should always follow your opportunity instructions.

For NIH proposals, Cayuse recommends you review the NIH websites on [Preparing](#) and [Applying](#).

Note: If you are submitting a subaward and are seeing Info tips recommending documentation in the prime, see [Subaward Validations](#).

Validations for Multi-Project Proposals

Multi-Project proposals are not just validated on an individual basis, but also on an entire project basis. To see a list of the validations that Cayuse 424 runs against Multi-Project Proposals, take a look at [Validation of Multi-Project Proposals](#).

Tracking Proposals

Cayuse 424 offers several tools allowing you to control access to proposals and track their progress through development and submission. Those tools are accessed on the toolbar in the upper right corner of the proposal screen, or under **Proposal Management** located below the forms list on the left side of the screen.

Overview
Opportunities
Proposals
Subawards
Routing
People
Institutions
Reports
Admin

Proposals List - a name
Proposals List

SF 424 R&R

SF 424 R&R

SF Performance Sites

SF Other Project Information

SF Key Persons

SF Personnel Data

SF Budget

SF Subaward Budget Attachment

NSF Cover Page

NSF Deviation Authorization

NSF Suggested Revisions

Regional Summary
Summary
Documents

1. TYPE OF SUBMISSION

- ☐ Pre-application
- ☒ Application
- ☐ Change/Corrected Application

2. DATE SUBMITTED

3. DATE RECEIVED BY STATE

4. a. Federal Identifier

5. Agency Routing Number

6. Previous Grants.gov Tracking ID

5. APPLICANT INFORMATION

Legal Name: University of Cayuse
Department:
Street: 10711 SW Beaverton-Hillsdale Hwy
City: Beaverton
State/Province: Oregon
Country: United States of America
Organization DUNS: 033374276
Division:
Street: Bldg. H, Ste. 554
County/Parish: Washington
Zip/Postal Code: 97005-4742

Person to be contacted on matters involving this application

Public:
First Name: Cayuse
Middle Name:
Last Name: Admin
Suffix:
Position Title:
Street:
City: Beaverton
State/Province: Oregon
Country: United States of America
Street:
City: Washington
Zip/Postal Code: 97005-4742
Phone Number:
Fax Number:
Email: redemr03333@uapay.com

6. EMPLOYER IDENTIFICATION NUMBER (EIN)
1-670543210-01

7. TYPE OF APPLICANT
M. Public/State Controlled Institution of Higher Education
Other (Specify):
Small Business Organization Type
☐ Women Owned
☐ Socially and Economically Disadvantaged

8. TYPE OF APPLICATION






- ☐ New
- ☐ Resubmission
- ☐ Renewal
- ☐ Continuation
- ☐ Revision

9. NAME OF FEDERAL AGENCY

Permissions
Routing & Approval
Electronic Submission
Proposal History
Export

Icons

Each of the Proposal Management tools is marked by an icon. The following table illustrates the icon for each tool and describes what that tool does.


Icon	Description
	Permissions. Clicking on the key icon will take you to the Permissions screen where you can manage user access and permissions on the proposal.
	Routing and Approval. Takes you to the routing and approval screen where you can build and manage the proposal's routing chain, approve the proposal, retract approval, and view the proposal's routing history.
	Electronic Submission. Click on the yellow lightning bolt to validate and submit the proposal. If the proposal has already been submitted, you can retrieve submission information.
	Proposal History. Opens the Proposal History screen where you can view an overview of the proposal as well as the history of edits and other activities on the proposal.
	Export. Sends you to the Proposal Export screen where you can validate, name, and export the proposal to another Cayuse 424 system.

Permissions

Proposal permissions in Cayuse 424 allow you to control access to your proposals. By default, the creator of a proposal and the System Administrators have access to the proposal. Depending on your institution's Cayuse 424 configuration, the Pre-Award Admins may also have automatic access to your proposal. Some institutions also make use of the Read-only Reviewer role. People with this role can see and review all proposals in the system, but cannot make any changes.

Other users cannot see or edit a proposal unless they are given permissions to do so. To grant someone particular permissions to a proposal, there are two permission types that you need to have yourself.

Viewing Current Permissions

1. Open the proposal.
2. Click the  icon in the upper right corner, or in the left sidebar under Proposal Management, to go to the Proposal Permissions.



The Proposal Permissions screen lists users who have access to the proposal, and indicates what type of access they have. This list only includes users who have been given access through this screen, not all the users who can see the proposal because of their Administrator or Reviewer status or their presence in the routing chain.

In order to edit the list, you need to have Administrator permissions, or you must appear in the list with the **Change Permissions**, **Add User/Group**, or **Remove User/Group** boxes checked. If you don't have these permissions, you won't be able to add or remove people from the permissions, or change which permissions they have.

Adding a User

1. Click the **Add user** button.
2. Select a user from the list, or search for another user by their name or username. Use **Show All** to show all users. The user is added to the Proposal Permissions. If the user is grayed out, they have already been added to the permissions.

Add Security Principal

close

Search

Show All

Select *Users* below to provide access to this Proposal.

Recently Used: 5 principals

Type	User	Profile Name
U	rpeters	Peters, Ryan
U	kbaker	Baker, Kim
U	ktobin	Tobin, Katherine
U	sweaver	Weaver, Stephen
U	callen	Allen, Cuba

Close

- Close the selection window by clicking the **Close**.

Editing Permissions


Once you've added someone to the permissions, you can change their permissions (if you are allowed to do so) by checking and unchecking the boxes to give them the right level of access.

Permission Types

Permission	Meaning
List	Can see the proposal in lists, but cannot open it for review.
Read	Can see the proposal in lists and open it for review, but not modify or print it.
Write	Can open and edit the proposal. (The Final Review action requires this permission because it recomputes values throughout the proposal.)
Delete	Can delete the proposal.
Change Permission	Can change permissions for this proposal, including their own. (This permission essentially allows complete control.)
Add/Remove User	Can add or remove a user from the proposal's permissions (but not modify which permissions are granted).
Attach	Can upload attachments to the proposal.
Print	Can print the proposal.
Submit	Can electronically submit the proposal to Grants.gov.
Break Lock	Can take write access away from another user who is editing the proposal. (Use this permission with caution; breaking the lock can result in the loss of unsaved changes.)

Removing a User

Once a user has been added to a proposal you can determine how much access to provide by editing the permissions (if you are able to do so). If it is no longer appropriate for a user to have any access then they can be removed from the proposal entirely.

To remove proposal permissions from a user, click the delete icon  next to the name in the Proposal Permissions. The user will no longer be able to see or access your proposal.

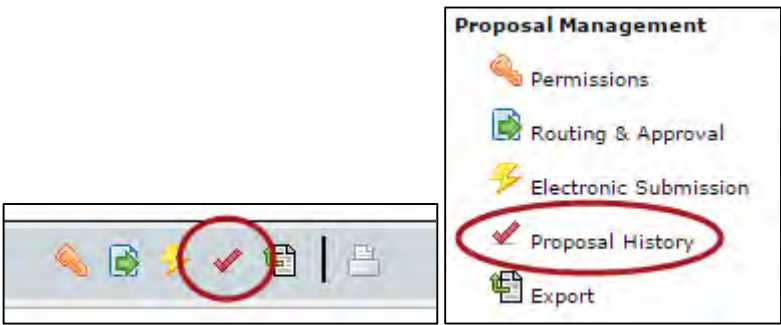
Paired Proposals

Permissions for paired proposals are set in Cayuse SP and synced to Cayuse 424. If there are existing permissions on a Cayuse 424 proposal, those permissions will be overwritten by the permissions from Cayuse SP when the proposal is paired.

Note: If a Cayuse 424 user's write permission is removed while they are editing a proposal, they will only be able to edit and save on the page they are working on. When they navigate away from that page, the removed write permission will be recognized and they will no longer be able to save changes.

Proposal History

To access the Proposal History from any proposal screen, find the ✓ icon at the top right corner of the proposal, or click Proposal History at the bottom of the left side proposal forms list.



The proposal activity logged includes the Date/Time, username and a summary for the following actions:

- Create Proposal
- Upload Attachment
- Delete Attachment
- Save Proposal (which includes form changes)
- Approve/Retract Proposal (routing comments are logged)
- Validate Proposal

This change history can be filtered or exported as a .csv file.

The Proposal History can be filtered by date to narrow the shown results and locate a particular entry. This page also contains a Proposal Overview that summarizes identifying information about the proposal.

✓ **Proposal History**

Proposal Overview

Opportunity	G.g AT07 and NIH Ext-UAT Test FOA (T01)
Opportunity Number	PA-C-T01
Internal Proposal Title	Outer Space
Total Proposed Costs	\$261,261
Sponsor	National Institutes of Health
PI	Bowie, David New Order (503) 717-9912 cwest@cayuse.com
Submission Date	

Proposal History

Show activity from: to: Update Date Filter

Show All

Export as CSV

Page: 1 2 3 (showing results 1 - 30)

Date/Time:	Username:	Person:	Action:	Summary:
2016-09-28 07:26	cayuseadmin	Cayuse Admin	View Proposal	Opened for edit

Note: Any user with view access to the proposal can see the Proposal History.

Submission

To successfully submit a proposal from Cayuse 424 to Grants.gov, the proposal must be complete and must conform to Grants.gov and agency requirements, including the form data and attachments.

To access the Electronic Submission area of the proposal, [open the proposal](#) and click the ⚡ icon along the top or in the left sidebar.



The Electronic Submission information has three sections: Opportunity Details, Proposal Submission History, and Electronic Submission.

Opportunity Details

By default, the Opportunity Details are hidden. To show them, click the plus sign next to Opportunity Details. This is a quick way to verify which opportunity the proposal was [created](#) with, and get information such as the Agency Contact and Closing Date.

Opportunity Details	
Opportunity	G.g AT07 and NIH Ext-UAT
Opportunity Number	PA-B2-R01
Competition ID	ADOBE-FORMS-B2
CFDA #	93.838
CFDA Description	Lung Diseases Research
Offering Agency	National Institutes of Health

Proposal Submission History

If the proposal is in development and has not been submitted previously, the Submission History will be empty:

Proposal Submission History			
S2S portal Tracking	Received Date/Time	Submitter	Message

Once a proposal has been submitted, the tracking number, submission date, and who submitted it will appear here:

Proposal Submission History			
S2S portal Tracking	Received Date/Time	Submitter	Message
GRANT00566396	2013-04-19 08:53:35 PDT	gsutrainig8	Successfully received by S2S port

If you click on the tracking number, the status of the proposal in the portal will be retrieved, and you can find out whether it has been validated and whether the agency has retrieved it. Once the agency has retrieved the proposal, if the agency has its own electronic portal, such as the NIH eRA Commons or NSF Fastlane, the proposal should appear there, and the PI will be able to review and/or edit them to ensure that the transmission was successful and accurate.

If the status that is returned is **Rejected with Errors**, the proposal was received, but the portal rejected it for some reason, commonly that it was past the deadline, or did not pass validations (see below). If you have any questions about this, especially if you may need to resubmit to meet your deadline, please [contact Support](#) immediately.

If the message field indicates that the submission was not successful, and/or it does not have a GRANT tracking number, then there was probably an error of some sort in transmission. See Troubleshooting below.

Electronic Submission

This is where you submit a proposal that has been fully and correctly prepared. If your institution uses [Cayuse 424's electronic routing](#), the proposal must also be successfully routed and approved by the final approver, usually an AOR. Each institution has its own policies and procedures for routing and submission. Be sure you are familiar with your institution's process before proceeding with submission.

The target for the submission is shown (usually Grants.gov).

Before submitting, we strongly recommend that you verify that there are no errors shown in the [Errors/Warnings/Info section](#), then click **Validate Proposal**.

(Run final validation checks - **recommended**.)

This checks your proposal for both the usual types of validation errors and errors in the construction of the XML data that is submitted to Grants.gov. The XML validations are not run during proposal editing because the XML changes rapidly as you enter data, so this is an important step to catch potential errors.

If there are any problems with the XML, you'll see the following warning:

Proposal Does Not Conform To Requirements

The portal will reject this proposal! Contact Support (ResearchSuiteSupport@Evisions.com, 503.297.2108 x201) if you need help.

This will be followed by the error count and a description of each error. If you read the error descriptions carefully, you can often understand what the problem is. However, if you are having any trouble, or if your deadline is approaching, contact Support right away.

If your proposal is error free after running the validations you will get a "No Problems Detected" report.



At this point, you are clear to click the **Validate and Submit to Grants.gov** button and the proposal will be sent to Grants.gov.

Troubleshooting

The S2S submission process is normally very stable. However, users very occasionally experience connectivity problems when submitting proposals. This is more common during heavy usage times around deadlines, and it does not necessarily mean that the transmission of your application has failed. In the event that an anomaly occurs, we recommend:

- Checking your email for a Grants.gov Receipt email containing the GRANT tracking number;
- Checking your email for a Grants.gov Acceptance or Rejection email containing the GRANT tracking number;
- If you're seeing "Check Status" in place of your GRANT tracking number, clicking the link to see if the GRANT tracking number populates.

If you have not received a GRANT tracking number after following the steps above, [contact Cayuse Research Suite Support](#).