

WHAT IS CAYUSE SP?

Cayuse SP was designed to manage research operations and provides a framework to track and report on sponsored programs activity.

Some features and benefits include:

- An electronic routing system for proposal review and approvals
- Replaces the Proposal Summary form

TO LOGIN TO CAYUSE

URL: memphis.cayuse424.com

Username: your UUID

Password: your University password

SYSTEM SETUP

Firefox is recommended web browser

PC & Mac Compatible

Browser Configuration Settings:

- JavaScript: On
- Cookies: Enabled
- Popups: Allowed

START IN CAYUSE SP

All proposals should be started by creating an electronic Proposal in Cayuse SP. All internal approvals will be obtained electronically by routing within the SP System.

Proposal packages can be started in Cayuse 424 while the Proposal is being entered in SP. All Cayuse 424 forms must be completed before the Proposal is routed in SP. The 424 application cannot be submitted to the sponsor until it is reviewed and approved by OSP.

Contact your Proposal Specialist in the
Office of Sponsored Programs

OR

Email: CayuseSupport@memphis.edu

The test environment for learning Cayuse :
<http://memphis-t.memphis.edu>
User name = your university email address
Password = gotigers
Email CayuseSupport@memphis.edu to have
account activated.

NAVIGATION

[HOME](#) | [MY DASHBOARD](#) | [REPORTING](#) | [LOG OUT](#)

- **Home:** Main screen with menu.
- **My Dashboard:** View, track, edit and authorize or certify Proposals
- **Reporting:** View reports on proposal activity
- **Logout:** Always logout.

NOTE: You must save before moving to the next screen in Cayuse SP.

Support (at the bottom right of the home page): links to [our website \(http://www.memphis.edu/research\)](http://www.memphis.edu/research) and [our support email \(CayuseSupport@memphis.edu\)](mailto:CayuseSupport@memphis.edu).

Understanding Roles in Cayuse SP:

Lead Principal Investigator: 'Lead Principal Investigator' will AUTOMATICALLY be assigned for the role of the first person entered. This named PI on the proposal is responsible for the technical, regulatory and financial aspects of the project. Only one person may have this role for the proposal.

Principal Investigator: Select the 'Principal Investigator' role for additional project personnel ONLY when multiple PIs are allowed (e.g. on an NIH proposal). Individuals designated as Principal Investigator must also certify the proposal prior to routing, and her/his reporting unit(s) must authorize the proposal during pre-submission routing.

Investigator: This role should be used for faculty level collaborators serving as Co-PIs, or Co-Investigators and who are considered to be key personnel and primary contributors to the proposed research project. These individuals are not required to certify the proposal, but the department Chair and Dean are required to authorize the proposal.

Proposal Editor (Administrative Contact): This individual has the ability to edit your proposal such as upload attachments, make corrections, and/or submit it for routing for you; but the person is not named on the budget (e.g., department contract and grant manager). Examples of individuals include Departmental Administrators, Administrative Assistants, Grant Coordinators, etc. This role grants simultaneous permissions equal to the Proposal Creator in the SP record and 424 record.

HOW TO CREATE A PROPOSAL FORM

- To begin a new Proposal, click **Start New Proposal** on the Proposal Dashboard.
- Throughout the Proposal sections you will see a magnifying glass icon, which signifies a lookup field. Click the icon and a pop-up window will appear allowing you to search data from a selection.
- An asterisk (*) indicates that a question must be answered before the page can be saved.
- Completing the General Information will allow an electronic Proposal to be created when the Save button is selected. However the remaining categories must be completed before the Proposal can be routed for electronic approvals.

HOW TO LINK A CAYUSE 424 PROPOSAL APPLICATION

- Only proposal applications that will be submitted electronically to the sponsor through Cayuse require a linked Cayuse 424 record.
- Those Proposals will have the "Submission Method" selected as "Cayuse 424" in the General Info section.
- The Cayuse 424 record can be accessed once the Cayuse 424 Proposal link is clicked in Cayuse SP. The first time this is clicked, you will be taken to the Cayuse 424 screen. Follow the instructions for selecting the opportunity and creating a proposal.
- Once the Cayuse 424 record is created, it is linked to the Cayuse SP form. The Cayuse SP proposal number will be auto-populated into the Cayuse 424 Proposal Summary, Proposal Number field.

HOW TO ADD KEY INVESTIGATORS

- Click the look-up icon to search by last name.
- The initial PI added to the Cayuse SP record in the Investigators/Research Team screen will default to the "Lead Principal Investigator." The Lead Principal Investigator MUST be entered first. Co-PIs should be added as "Principal Investigator." All PIs will be required to complete the PI Certification (Approval) in Cayuse SP.
- If a person is not listed, please email CayuseSupport@memphis.edu to request a person to be added.
- For each Research Team member, enter the expected effort in person months. If an individual holds dual appointments you may change the department.
- If an individual holds a dual appointment or if credit for a person needs to be split between two units, that individual may be entered a second time, changing the department and including 0%effort & person months and the appropriate allocation of credit.

HOW TO ENTER A BUDGET

- The budget in the Proposal is a snapshot of the initial and total requested budget. The internal budget and budget justification should be included as an Attachment.
- Some information will be auto-populated but it is important to complete all required fields in order to Save.
- The F&A rate defaults to the Organizational Research Rate. Click on “Change Rate” to select the F&A rate that applies to your proposal.
- Click “Calculate F&A Amount” and “Calculate Total” for the Initial Budget Period.
- Repeat these steps for the Total Project Period.

HOW TO ADD SUBCONTRACTORS

- If subcontractors are included in the proposal, click the magnifying glass to locate and enter the subcontractor name(s).
- If the subcontractor cannot be found, fill out the new Sponsor form (link found in the instructions on the first screen of SP and email it the CayuseSupport@memphis.edu.
- As you add subcontractors, a list of all subcontractors for your project will be developed. If necessary, subcontractors can be removed from the list by clicking “Remove” to the right of a subcontractor.
- If there are no subcontractors included click “No Subcontractors” and move to the next page.

HOW TO ADD ATTACHMENTS

The are some of the minimum documents to attach before routing:

- RFA/PA/Guidelines (the link may also be provided in the General Summary tab) *
- Internal Budget (in Excel) and Budget Justification
- Scope of work, project plan, narrative, etc.
- Subrecipient documents, if applicable
- Representations & Certifications, if required*
- Any other sponsor required forms/documents*
- F&A Waiver justification/documentation
- FCOI Responsible Personnel List

You may add as many attachments as necessary. There is no restriction on file size, but larger documents will take more time to upload. Most file types are acceptable.

Be sure to pick from the drop down box the document type you are uploading (e.g., budget, budget justification, etc.)

Attachments may be viewed by all members of the project team, approvers in the approving departments, and OSP.

*

Indicates a required field



Allows you to Search and Look Up from a drop-down box



Indicates that a tab in the Proposal is complete



Use the calendar icon to enter the date. Dates can be entered manually .



Print or save a PDF copy of a submitted proposal



View attachments



View notes included



Access the linked proposal package in 424

EDITING & COPYING A PROPOSAL

- You can create a “copy” from an existing proposal in Cayuse SP. Many fields are carried over (such as dollars, cost-share and subawards). Be sure to go through each section and update the information. The original proposal will not be altered. The new proposal will be assigned a different proposal number.
- You can also edit an existing proposal. This option is only available for proposals that have not been submitted for routing.
- To edit, copy or delete a proposal, go to the Proposal Dashboard by clicking on My Proposals or Proposals in My Department.

Tracking Proposals

Edit and track all of the proposals that you either initiated or on which you are listed as the Lead PI, PI, or other contributing member. Submitted and un-submitted (in progress) proposals are separated into two tabs. The number to the left of My Proposals indicates the number of proposals in progress, if any. Submitted proposals are locked from editing.

“Submitted” proposals in Cayuse SP means submitted by the preparer for internal routing, approval and review, not submitted to the sponsor.

[View Routing Status](#)

This button will allow you to view which PIs have certified and which departments have approved the proposals.

HOW TO CERTIFY OR APPROVE PROPOSALS

HOW APPROVE THE ROUTING QUEUE

The Approving Departments are automatically added for investigators who are included on the Investigators/Research Team screen.

The Responsible Org of the Lead PI is always listed first and cannot be changed or removed. The additional departments listed are those that must approve the proposal based on the responsible orgs of all key personnel. The routing order for these departments can be made sequential or concurrent by changing the number in the drop down box. You can change the order of routing for any org other than that of the Lead PI.

You can only remove a department which has a "Remove" link next to the role.

You must click the "Authorize Department Listing" button in the Approving Departments screen of Cayuse SP prior to submitting the proposal for routing and review. If this button is not clicked, approvers will not be added to the routing queue.

HOW TO SUBMIT A PROPSAL

After you have received green check marks for all of the components of the proposal, it can be submitted for routing and approval.

Once a proposal is submitted for routing in Cayuse SP, Co-PIs will receive an email indicating that the proposal has been submitted and requires their certification as a PI.

The Approving Departments will receive an email indicating that the proposal has been submitted and requires their approval. This email will go to the approvers established in Cayuse for the particular unit. Any of these individuals may log in and approve the proposal on behalf of the department or college.

PI Certification: After receiving an email to certify the proposal, each Key Investigators will need to log into Cayuse in order to certify. The Home page will show that proposals are awaiting their review in the PI Certification Inbox under Certifications/Approvals. They can click on a proposal number in the list, which takes them to a Proposal Routing Status page. When they are ready to approve, they will click the "Certify Proposal" button shown mid-way down the page. It is important to review the proposal and certify promptly so that the routing process may continue in a timely manner.

Departmental Approvers: After receiving an email to approve the proposal, any of the individuals designated as departmental approver may log in and approve the proposal on behalf of the department or college. Once logged in, they will be able to see whether or not the PIs in their area have certified the proposal. It is recommended that an Approving Department not approve until the associated PIs for their area have certified. The Home page will show that proposals are awaiting their review in the Dept Approval Inbox under Certifications/Approvals. The approver can click on a proposal number in the list, which takes them to a Proposal Routing Status page. When they are ready to approve, they will click the "Authorize Proposal" button shown mid-way down the page.

NOTE: All Investigators must certify the proposal before the department approvers can complete the review and approval process.