Accessing Cayuse SP

Getting Started:

- Use Mozilla Firefox for best results.
- Login to https://ua.cayuse424.com with your myBama ID and password.
- Note: If you receive an error message when you login, please contact erasupport@ua.edu to verify your account has been created in Cayuse.
Cayuse Landing Page:
- Click on Cayuse SP (Sponsored Projects)

Cayuse Research Suite
3.9.1

Research Administration Modules
- Cayuse SP (Sponsored Projects)
- Cayuse 424

System Administration Applications
- Backbone
- Research Contacts
- Events

Application Help
- Research Suite Support Center

Office of Sponsored Programs
My Dashboard:

**Proposals in My Unit** - view or edit proposals and related items.

**Awards in My Unit** - view awards and related items for IPF’s that list your unit as the "Administrative Unit" on the IPF General Tab (Dept. of Lead PI).

**PI Certification Inbox** - Proposals awaiting review and approval by the PI are located here.

**Unit Approval Inbox** - Proposals awaiting review and approval are located here.

Dashboard View

**My Dashboard** - Get fast access to proposals, awards and begin routing certifications and approvals.
Overview - Certifications and Approvals

- Certification and approval are two distinct steps in Cayuse.
- Certification - any time and in any order.
- Approver - sequential in order of approver.
Certifying a Proposal

The Lead PI and Co-Investigators listed on the Investigators/Research Team tab must individually review and certify the IPF.

- Go to the **PI Certification Inbox**.
- Select the appropriate proposal number under the **To be Certified** tab.
- Select **View IPF** or the proposal number to review the IPF tabs or the PDF icon to view as an IPF.
- If appropriate, select **Certify Proposal**.
- Review the certifications and select **Submit Certification** if you agree.
Check Status of Certifications/Approvals

You can check the status of a proposal in Cayuse to review Certifications, Approvals and routing progress.

- Select My Proposals if you created the IPF or are listed on the Investigators/Research Team tab.
- Select Proposals in My Unit if you have access for the administrative unit of the Lead PI.
- Search for the proposal.
- Click on the Proposal number.

Office of Sponsored Programs
Check Status of Certifications/Approvals

- Review status on the Approvals tab of the IPF.
- You can check if all PI/Co-PI's have certified the IPF.
- You can check where the IPF is in the routing chain or if it is competed.
- You can check the status in the status history.
Select **Unit Approval Inbox**.

Find and open the proposal(s) to be approved by clicking on the proposal number in the first column.
### Approving Proposals in your Unit

Select **View IPF** to review the proposal.

**Proposal Routing Status**

<table>
<thead>
<tr>
<th>Proposal</th>
<th>IPF</th>
<th>Sponsor: National Science Foundation - NIP</th>
<th>Submission Deadline: 9/19/2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project</td>
<td></td>
<td>Prime Sponsor: Grant</td>
<td>Proposed Begin-End Dates: 1/01/2020 - 9/3</td>
</tr>
<tr>
<td>Lead PI</td>
<td></td>
<td>Instrument Type: Grant</td>
<td>Proposed Total Amount: $110,000.00</td>
</tr>
<tr>
<td>Admin Unit</td>
<td>Geography</td>
<td>Intermediate-severity disturbances and cultural fire in the maintenance of mixed-species forests</td>
<td></td>
</tr>
</tbody>
</table>

#### Approvals

<table>
<thead>
<tr>
<th>Compliance</th>
<th>Status History</th>
<th>Advance Spending</th>
<th>Awards</th>
<th></th>
</tr>
</thead>
</table>

The above proposal has been successfully submitted. All lead principal investigators and approving units listed below have been notified and should electronically authorize (in routing order for units) this proposal before it is reviewed by the Office for Sponsored Programs.

**Investigator(s) who must certify this Proposal**

<table>
<thead>
<tr>
<th>Investigator</th>
<th>Role</th>
<th>Decision</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Lead Principal Investigator</td>
<td>Not Yet Reviewed</td>
</tr>
</tbody>
</table>

**Units that must authorize this proposal**

<table>
<thead>
<tr>
<th>Unit</th>
<th>Authorizing Person</th>
<th>Authorizing Decision</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Jennifer Milliard</td>
<td>Not Yet Reviewed</td>
</tr>
<tr>
<td>2</td>
<td>Jennifer Milliard</td>
<td>Not Yet Reviewed</td>
</tr>
<tr>
<td>3</td>
<td>Jennifer Milliard</td>
<td>Not Yet Reviewed</td>
</tr>
<tr>
<td>4</td>
<td>Jennifer Milliard</td>
<td>Not Yet Reviewed</td>
</tr>
<tr>
<td>5</td>
<td>Jennifer Milliard</td>
<td>Not Yet Reviewed</td>
</tr>
<tr>
<td>6</td>
<td>Jennifer Milliard</td>
<td>Not Yet Reviewed</td>
</tr>
<tr>
<td>7</td>
<td>Jennifer Milliard</td>
<td>Not Yet Reviewed</td>
</tr>
<tr>
<td>8</td>
<td>Jennifer Milliard</td>
<td>Not Yet Reviewed</td>
</tr>
</tbody>
</table>

**Status History**

<table>
<thead>
<tr>
<th>Status</th>
<th>Person</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dept Approval In Process</td>
<td>Jennifer Milliard</td>
<td>9/25/2020, 3:43 PM CDT</td>
</tr>
<tr>
<td>Submitted for Routing</td>
<td>Jennifer Milliard</td>
<td>9/25/2020, 3:43 PM CDT</td>
</tr>
<tr>
<td>IPF Initiated</td>
<td>Jennifer Milliard</td>
<td>9/19/2020, 2:10 PM CDT</td>
</tr>
</tbody>
</table>

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Office of Sponsored Programs

[Research & Economic Development](#)
Approving Proposals in your Unit

- Navigate to each section by selecting the links under the Item List.
- Review the IPF as appropriate.
Once you have reviewed the proposal for submission, select Authorize Proposal.

Option 1: From the Unit Approval Inbox, Authorize Proposal is available under the Proposal Routing Status view that appears when you click on the proposal number.

If you identify issues with the IPF or project, contact the Lead PI and the OSP Specialist. Do not reject the proposal before talking to the Lead PI or all prior approvals must route again.
Once you have reviewed the proposal for submission, select **Authorize Proposal**.

**Option 2:** From View IPF, **Authorize Proposal** is available within the Item List.

If you identify issues with the IPF or project, contact the Lead PI and the OSP Specialist. Do not reject the proposal before talking to the Lead PI or all prior approvals must route again.

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**Office of Sponsored Programs**
Guidelines for Certification/Approval
What to review in each section of the IPF

- **General Information** - Accuracy of the administrative unit and sponsor; appropriate classification of the project (e.g., basic research, applied research, other sponsored activity, etc.).
- **Investigators/Research Team** - Reasonableness of effort commitment, approval of cost share effort, availability of key personnel to conduct the project.
- **Budget** - Appropriateness of budget, including mandatory cost share (View detailed budget in attachments section of IPF).
- **Conflict of Interest** - External Activities have been disclosed in accordance with UA policy.
- **Regulatory Compliance** - Fields indicated align with proposed scope of work.
- **Subcontractors** - Appropriateness of proposed subrecipients.
- **Export Control** - Security matters can be addressed if an award is made, including foreign activities.
- **Intellectual Property** - Patent or other proprietary information is properly disclosed
- **Other Project Information** - If the PI is working with an affiliated University Institute, the applicable Institute(s) and their respective % credit (must equal 100%) are noted on the Recognition of Institute Involvement form as an attachment.
- **Location of Sponsored Activities** - If the PI is working with Board of Trustees designated Research Center(s), the applicable Center(s) are noted with their respective % of credit for each center (must equal 100%).
- **Proposal Abstract** - Review summary to determine if other proposal elements align with the project (e.g., adequate financial resources, space, faculty effort, etc.)
Ensure the proposed project aligns with the mission/objectives of department, school/college and University

Plans for institutional commitments and confirm they can be met
  - For example:
    - Course release
    - Cost share, if required

Confirm that sufficient resources are available to conduct the work
  - For example:
    - Equipment
    - Facilities
    - Collaborators, students, etc.

Acknowledge that compliance requirements can be met
  - For example:
    - Human Subjects/IRB
    - Export Control
    - Intellectual Property/Patents
    - Financial Conflict of Interest
    - Disclosure of External Activities

Affirm that the PI understands the responsibilities and requirements associated with the project
Central Administrative Support

- For questions, training and other Cayuse SP matters, please contact erasupport@ua.edu
- OSP Staff listing