

Cayuse Cheat Sheet

LOG IN

From ORS home page (www.ors.ttu.edu)

- Cayuse Training: Use this link for training and practice only. Please DO NOT use this link to submit real proposals.
 - Name: (your e-Raider ID)
 - Password: re85search
- Cayuse Live: Use this link for active proposals and awards. Please DO NOT use this link for testing or practice.
 - Use your eRaider credentials – both User ID and password

SYSTEM REQUIREMENTS

- Cayuse is fully supported at this time on Internet Explorer or Mozilla Firefox. Google Chrome as well as Safari are being provisionally supported. [Please report any bugs you experience with Google Chrome or Safari to the Cayuse System Administrator.]
- Cookies and pop-ups must be enabled for the Evisions/Cayuse site. This can be done each time you open Cayuse, or you can set the Evisions site as a safe site.

TERMINOLOGY CHANGES

Before Cayuse	After Cayuse
Principal Investigator	Lead Principal Investigator
Co-PI	Principal Investigator
Internal Routing Sheet	Internal Processing Form
ORS Log Number	Proposal Number
**	Project Number
**	Pairing a Proposal

USE CAYUSE 424 WHEN...

- Creating a proposal to any federal agency (route through Cayuse SP).
- Submitting a change of Lead PI or PI, department or % credit (route through Cayuse 424).

USE CAYUSE SP WHEN...

- Routing a proposal for external funding.
- Looking at your proposals or awards.
- Looking for reports (very limited at this time). [Reporting will still be available from the ORS database, InStORS until Cayuse reporting is more robust.]
- Electronically “signing” or certifying your participation on a proposal.
- Approving a subordinate’s participation on a project.

PROCEDURAL CHANGES

- Paper routing sheets will no longer be accepted.
- Request for Reduction/Waiver of F&A
 - Complete *Request for Reduction/Waiver of F&A form* and obtain required approvals (original or electronic signatures accepted).
 - Convert to PDF.
 - Open SP routing and click on “Attachments” link.
 - Browse for the title and upload.
 - Select “Document Type” from drop down box.
 - Click “Add” button to the right of the screen.
 - Add note under “Submission Notes” about inclusion of Waiver Request.
- Cost Sharing Approval
 - Complete *Cost Sharing Approval form* and obtain required approvals (original or electronic signatures accepted).
 - Convert to PDF.
 - Open SP routing and click on “Attachments” link.
 - Browse for the title and upload.
 - Select “Document Type” from drop down box.
 - Click “Add” button to the right of the screen.
 - Add note under “Submission Notes” about inclusion of Waiver Request.

OTHER IMPORTANT NOTES

- Your access level determines what you are able to see. Deans can only view information for their college; department chairs can only view information for their department; Investigators can only view their own information.
- Complete the “General Information” section of the IPF first and save it. This creates the proposal number. The other sections can be completed in any order.
- Begin routing when budget has been finalized. Once the routing process is underway, a paired 424 proposal will lock and you will not be able to make any further changes to any of the forms. You will, however, be able to continue working on the items to be uploaded, such as project narrative, biographical sketch or project abstract or summary.
- Once each section has a green check mark the routing can be submitted for routing to obtain certifications and approvals.

GLOSSARY

- *Internal Processing Form (IPF).* An Internal Processing Form (IPF), synonymous with the Internal Routing Sheet, is a transmittal sheet containing all the data tracked by the university and entered into the database. Electronic certifications and authorizations are recorded on the IPF.
- *Lead Principal Investigator.* Every proposal must have one (1) Lead Principal Investigator. This individual is primarily responsible for the technical, regulatory and financial aspects of the project.
- *Pairing a Proposal.* Proposal records developed in Cayuse SP may be paired with proposals in Cayuse 424. To ensure proper linking, you must begin building the proposal in SP. The Cayuse 424 Proposal link launches the paired 424 proposal. The only information currently shared between SP and 424 is the proposal number. This identifier links the proposals together, but no data is exchanged. When the proposals are linked, routing in 424 is turned off and handled completely through SP. The actual proposal is submitted to Grants.gov via 424.
- *Prime Funding Agency.* This is applicable for projects which TTU is a subrecipient of a subaward or subcontract from a partnering organization. In these situations, the partnering organization is the Sponsor and the agency from which the funds originated would be listed as the Prime Funding Agency. For example, TTU receives a subaward from University of New Mexico and UNM received those funds initially from NSF. UNM would be the sponsor and NSF would be the Prime Funding Agency.
- *Principal Investigator.* Co-Investigator or any other roles that may fall under this designation include: Research Scientist, Research Specialist, Research Associate, or Scholar.
- *Project Number.* A specific study in Cayuse SP that holds proposals, awards and subcontracts for the entire life of a funded project.
- *Proposal Number.* Generated automatically when the SP General Information section of the IPF is saved. It starts with two digits (the fiscal year) and is followed by a second number, which

follows a consecutive pattern. *Project Number*. A specific study in Cayuse SP that holds proposals, awards and subcontracts for the entire life of a funded project.

- *Short Project Name*. This is an internal reference for the project to distinguish between similar proposals. This will serve as an alias to identify the proposal record through the proposal life cycle. The following format is recommended - PI Last Name _Sponsor _Mechanism_ Due Date_ORs analyst initials. (Example: SMITH_ NIH_R01_ 6/5/2013_cs).