

Cayuse Frequently Asked Questions (FAQs)

- 1) **Do I use my active directory user name and password to access the new Cayuse?** Yes, Cayuse SP and Cayuse 424 (Proposals) use active directory for login. If you are having trouble, please try your username in lower case
- 2) **What is Cayuse 424 called in the new system?** Cayuse 424 has been renamed Cayuse Proposals S2S
- 3) **Where does the routing chain reside in the new system?** The routing chain is in Cayuse SP. It will be partial created for you based on the faculty research team, you will need to manually add the compliance units.
- 4) **Which part of Cayuse is the source of data for reporting?** Cayuse SP
- 5) **Which part of Cayuse system to system with the Sponsor?** Cayuse 424, now called cayuse Proposals S2S will be used to submit the proposals to Grants.gov
- 6) **Does Cayuse Proposals (or Cayuse 424) have system to system access for Non-Federal sponsors?** No, but you will need to complete and IPF (Internal Processing Form) and route through Cayuse SP for approval to submit.
- 7) **Can I access archived proposals from Cayuse 424?** Yes, legacy proposals are available in Proposals S2S. If you do not see your old proposals, please let us know.
- 8) **Do I have to maintain the naming convention in the title in the new Cayuse?** Yes, we ask that you continue using the naming convention establish for short title. (PI/Sponsor/Mechanism/Due Date)
- 9) **Can I autofill the budget from 424 (Proposals) to Cayuse SP?** In most cases you will be able to use the autofill function in Cayuse SP (Budget Tab) to bring in the budget that you completed in 424 (Proposals). We are aware that training grant proposal do not autofill. If you are unable to get autofill to populate SP, please use the summary budget function including Direct and Indirect.
- 10) **Where should I upload attachments in the new system?** If they are meant to go to the Sponsor, it will be Cayuse Proposals S2S. Internal attachments would be done in CayuseSP.
- 11) **If there are multiple PIs on the proposal, who will need to certify the proposal?** Those identified as Lead Principal Investigator (Contact PI/PD) or Principal Investigator will need to certify the proposal.
- 12) **Does the PI have to go into Cayuse to complete the PI certification?** The certification happens in CayuseSP. If the PI doesn't want to certify in Cayuse SP, then s/he should fill out, sign and attach [the PI certification](#) in Cayuse SP.
- 13) **Is the PI in the routing chain?** No. His/Her approval is on the IPF within Cayuse SP.

14) **When does the PI receive an email to certify the proposal?** When routing begins. Please remember that the PI would get only one email. No further reminder.

15) **If there are multi-PIs, does the administrator also receive emails to trigger their approval is required?** All units requiring approval will be emailed when their approval is required

16) **Can the proposal be modified after the IPF has been submitted in Cayuse SP?** No, the IPF can't be modified after the IPF has been submitted, unless you reach out to OGS.

17) **Can the budget in Cayuse ProposalS2S be modified after submission in Cayuse SP, but before submission to sponsor?** Yes.

18) **Is a Cayuse proposal required prior to award set up?** Yes, proposals must be entered in Cayuse by the dept before the award can be set up in Banner.

19) **Is there a flag for COVID-19 research?** Yes If this proposal is related to COVID-19 research please put a comment and OGS will add the COVID-19 Flag

20) **Should we reach out to outgoing subcontractors and ask them to use Cayuse Subcontracts to input their budget and other details?** Yes

21) **If funded, who is going into SP to reflect the amount awarded to Einstein?** Research Finance, award setup team

22) **If funded, will SP reflect the detailed budget awarded or direct and indirect?** The awarded amount for now will be direct and indirect only.

23) **Does Cayuse Proposals S2S lock and require OGS to unlock if an adjustment is needed or attachment is needed after the AOR approval?** Yes.

25) **Does data import from the Funding Opportunity Announcement (FOA)?** Yes.

26) **Is the routing chain sequential or parallel?** Yes, is tiered parallel routing.

27) **Can I add myself as an administrator to the routing chain before OGS reviews the proposal?** Yes, only if you are an IPF approver you will need to add your Z-ORG.

28) **What happens if someone in the routing chain is on leave (temporary or extended)?** Contact Office of Grant Support and we'll look into it, add/delete, if necessary.

29) **Does the Chair have to approve the proposal in the routing chain?** No.

30) **In the hierarchy, is the PI recognized in his/her faculty appointment or banner org.?** PI is recognized in their Faculty Appointment ORG

31) If I need to approve as a banner org administrator, how do I add myself to the routing chain? We built the administrator routing chain from Banner Financial Managers. Therefore, if you are the financial manager, you will be added to the routing chain if your department staff is listed key personnel in the budget.

32) Are the compliance offices automatically added to the routing chain? For example, if the proposal indicates that animal research is included, is the IACUC office automatically added to the routing chain? Not at this time. Compliance approvals must be manually added on the Approving Units screen. The next version of Cayuse will trigger automatically adding compliance offices to the routing chain.

33) If I added someone to the routing chain by accident, can I remove him/her? Yes, but if you can't, please contact OGS.

34) Will we be able to see who has approved and who hasn't approved in the routing chain? Yes. If it is your turn to approve you can see who has approved or if you are the PI, DA, or OGS you will see all units that are required to approve and who and when each unit provided approval.

35) Can the application be approved or submitted if PI Certification is not done? No

36) Can I still make changes in Proposal 424 when the application is being routed through Cayuse SP? Yes

37) What is Parallel Routing? Does it mean that all approvers can access the proposal simultaneously and approve? Yes, everyone in a routing group/level can review and approve simultaneously by tier.

38) Would I have delegated authority similar to what we do in Cayuse 424? Yes, but limited.

39) Some naming conventions are different in Proposals 424 and Cayuse SP, such as "PD/PI in Proposals 424 and "Lead PI" in Cayuse SP are they synonymous? Yes.

40) What documents should to be added to Proposals 424 and what should be added to Cayuse SP? Any documents that need to go to the sponsor to be attached to Cayuse Proposals. All internal document to be added into CayuseSP

41) Whom should I contact in case of any problems with Cayuse SP? Regina Janicki or Cayuse at (503) 297-2108

42) If there is a PI and Co-I, do they both need to certify? There is no role for Co-I. Only the contact PI/PD certifies.