Cayuse Professional Profiles

Ensure the investigator’s department is correct. If there are multiple listings of a unit, select the unit code used for contracts and grants. The Professional Profiles in Cayuse 424 contain the necessary information for accessing proposals in Cayuse SP and 424 and for routing and approval of Cayuse SP proposals. Keeping the Professional Profiles of people whom will serve as Key Personnel will mitigate Cayuse SP routing issues.

Cayuse SP Internal Processing Form (IPF) Entry

Entering the correct information on the IPF will ensure your proposal/action routes to the appropriate administrative office and team within the administrative office.

Select the unit that will administer the grant.
- Often associated with indirect cost return.
- Do not select an administrative cluster or similar unit.

For proposals, enter:
- [Sponsor Deadline] [PI] [Sponsor]

For award amendments, enter:
- [Action] [PI] [Sponsor]
- Include the SPO analyst’s name if applicable

Identifies the requested action and appropriate administrative office.
- Select “New – Graduate Studies” for submission to the Office of External Fellowships, Division of Graduate Studies.
- Select “New – UC Davis Health” for purely industry-funded clinical trial protocol submissions to the UC Davis Health Clinical Trials Contracts Office.
- Select other appropriate Proposal Type for submission to SPO.
All key personnel must be entered on this page. If you wish to enter additional (non-key) personnel, you may. Please note: any corrections or changes to the “List of Personnel” below during IPF review may require reauthorization of the Departments and/or Deans’ Offices.

<table>
<thead>
<tr>
<th>Person</th>
<th>Unit</th>
<th>Role</th>
<th>Sponsored Effort</th>
<th>Cost Shared Effort</th>
<th>Total Effort</th>
<th>Allocation of Credit</th>
<th>Person Months</th>
</tr>
</thead>
<tbody>
<tr>
<td>Charlie Apple</td>
<td>Sociology (040320)</td>
<td>Lead Principal Investigator</td>
<td>30%</td>
<td>0%</td>
<td>30%</td>
<td>80%</td>
<td>2.7</td>
</tr>
<tr>
<td>Amie Admin</td>
<td>Sociology (040320)</td>
<td>Proposal Editor</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
<td>0</td>
</tr>
<tr>
<td>Kassie Obelle</td>
<td>Med: Div Of Internal Med</td>
<td>Principal Investigator</td>
<td>30%</td>
<td>0%</td>
<td>30%</td>
<td>20%</td>
<td>2.7</td>
</tr>
</tbody>
</table>

Change the Unit if necessary. Do not leave Units if one of the following qualifiers is indicated in the parenthesis:
- “Use the PI’s Int Med Dept.”: Change to the division within Internal Medicine.
- “Non Admin/Home Dept”: Change to the correct unit code; may require checking with the department.
- “Use #####”: Change to the unit code indicated.

Only add Key Personnel and personnel needing view/edit access:
- Use the “Proposal Editor” or “Other Participant – No Routing” for non-Key Personnel if no effort is included

Users here will automatically have access to the IPF and any associated Awards.
Do not enter separate lines for each internal (UC Davis) unit providing cost sharing. Instead, enter one line for ALL internal cost sharing, following the instructions in red. Upload cost-sharing commitment letters/emails as Proposal Attachments.
If your proposal is an after-the-fact AND the sponsor provided a draft award agreement, select "Yes" to #5 and upload the draft agreement as a Proposal Attachment.

For industry-sponsored clinical trials, please attach the following documents:

- Sponsor Protocol
- Final Sponsor Budget
- Final Internal Budget
- Editable Agreement
- Exception to Policy

Upload the minimum required documents for SPO assignment (Scope of Work, Budget, Budget Justification and Subaward documents, if applicable).
Review the units listed and the associated role(s) for accuracy. A unit including “(Use ####)" should only be listed if the associated role indicates it is a rollup from another unit as seen below. Make any needed corrections on the appropriate IPF tab.

Re-route the units as appropriate. List roll-up units after the unit for which they are rolling-up. List Intl Cost Sharing (99999) last.
Review the Approvals tab after submitting the IPF for routing.

Ensure all users listed here certify the IPF. Only Lead PI’s and co-PI’s should be listed here.

If the “Authorizing Persons” field is blank or includes “OR Cayuse Help”:
1. Email ORCayuseHelp@ucdavis.edu and request the IPF status be returned for correction.
2. Review the Cayuse IPF Approving Units tab to determine needed changes.
3. Make needed changes.
4. Submit the proposal for routing (again).