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Professional Profile Overview
Cayuse Professional Profiles contain the necessary information for accessing proposals in Cayuse SP and 424 and for routing and approval of Cayuse SP proposals. Principal Investigators, contract and grant administrators and others that play a role in the proposal process must have a Cayuse Professional Profile.

Tips
- Ensure smooth routing in Cayuse SP by ensuring the unit code listed is the code used by the department/unit for contracts and grants accounting.
- Streamline budget calculations by keeping salary and appointment information current.
- Improve search speed by selecting the institution when searching for a user.
- Avoid duplicate profiles by not creating a profile for someone else.

Find a Professional Profile
1. Login to the Cayuse Research Suite (https://ucdavis.cayuse424.com) using your Kerberos. If you do not have a Kerberos User Name, work with your department to create one and provide the user Kerberos ID, email address and UC Davis Employee to ORCayuseHelp@ucdavis.edu.
2. Select “Cayuse 424”.
3. Select “People”.
4. Type the last name in the Search field, change the “@” field to “The Regents at the University of California (Davis) – UC Davis” and then select “Search”.

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Tips:
- Ensure smooth routing in Cayuse SP by ensuring the unit code listed is the code used by the department/unit for contracts and grants accounting.
- Streamline budget calculations by keeping salary and appointment information current.
- Improve search speed by selecting the institution when searching for a user.
- Avoid duplicate profiles by not creating a profile for someone else.
Create a Professional Profile
Do not create a profile for someone else at UC Davis. Contact ORCayuseHelp@ucdavis.edu if you need to create a profile for another UC Davis user.

1. Follow the steps above to ensure a Professional Profile does not exist for the user.

2. From the People/Professional Profile list, select “+ Person”.

3. Complete the pop-up window and select Create New Profile. Include the person’s middle name if applicable.

4. Provide permissions/access to this Professional Profile by selecting the Permissions (key) icon. Provide access to contract and grant staff the support the investigator.
a. Select “+ Add user”.

i. If the person you are adding is listed under Recently Used, select their name and skip to step 7.b. below.

ii. If the person is not listed under Recently Used, enter their last name in the text field and select “Search”.

Add Security Principal

test

Select Users below to provide access to this Professional Profile.

Recently Used: 15 principals

<table>
<thead>
<tr>
<th>Type</th>
<th>User</th>
<th>Profile Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>U</td>
<td>ipfapprover</td>
<td>Apple, Charlie</td>
</tr>
<tr>
<td>U</td>
<td>amieadmin</td>
<td>Admin, Amie</td>
</tr>
</tbody>
</table>

Add Security Principal

Search

Show All

Select Users below to provide access to this Professional Profile.

Recently Used: 15 principals

<table>
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<td>Admin, Amie</td>
</tr>
</tbody>
</table>
iii. If the person is listed under Search Results, select their name and select “Close”. Then continue to step 7.b. below.

![Add Security Principal]

iv. If their name is not listed, they either do not have a profile or their profile is saved under a different name. Either continue searching under other known names or ask them for more information.

b. Set the level of permissions to grant by checking and unchecking the appropriate boxes.

![Permissions for Professional Profile: Test-Profile, New]

5. Return to the profile to finish completing the required information by selecting the profile name in the breadcrumbs. Once a user is added to the Permissions page, they may finish completing the profile.
Complete the following General Personal Information sections. **Do not complete the Demographics and Biosketches sections.**

a. Name:
   i. Add the NIH Commons ID if the person will work on or submit proposals to the National Institutes of Health (NIH).
   ii. Select “Rename” to change the person’s name.

b. Degrees (Optional): Add relevant degree information.
7. Add the Institutional Association by selecting the plus (+) sign. This is a **critical** step as it associated the profile with UC Davis.

8. Complete Contact Info section.

- Find “The Regents of the University of California (Davis) – UC Davis” on the list and select “Create Institutional Association”.

- Must use Zip+4 format
9. Complete the eRA Role section. **Critical for anyone that will use Cayuse 424 as it grants the relevant access/permissions in Cayuse 424.**
   a. Principal Investigator: Any person that may serve as a Lead Principal Investigator, co-Principal Investigator or any other investigator role on a proposal in Cayuse 424. **Only user with this role will display in the Principal Investigator list.**
   b. Assistant: Anyone that may assist with proposal preparation in Cayuse 424.
   c. The other three roles are reserved for the Sponsored Programs office.

10. Complete the Department/Division/Title section. This is a **critical** step for all users as it manages Cayuse SP routing and approvals.
   a. Select the unit that will be used most often to approve the person’s effort on proposals for extramural funding. Having the incorrect unit will cause routing errors in Cayuse SP any time this person is added to a Cayuse SP Proposal/Internal Processing Form.
11. Complete the Salary and Fringe Worksheet section.
   a. Employee ID: Enter the person’s UC Davis ID if known.
   b. Appointment Type: Enter the person’s relevant appointment months and associated salary. Use the annualized salary to aid in budget calculations. Learn about annualizing salary and other proposal budget preparation topics in our Preparing a Proposal Budget Toolkit.
   c. Select Import Institutional Rates, the select the appropriate rate type.

![](image1)

12. Complete the Performance Site section by adding the location where most of the person’s work will be performed. If the DUNS number and Congressional District are not auto-populated, enter that information as well.

![](image2)
13. Routing Profile (optional): If the profile is for a Principal Investigator, set up their Routing Profile. This will save time when creating Cayuse 424 proposals as the routing chain will be auto-populated anytime this person is added as the Lead Principal Investigator to a Cayuse 424 proposal. Only add the usual SPO analyst and others that must approve the 424 proposal separate from Cayuse SP. Use this option sparingly.
   a. Select the Next Reviewer icon to add a person after the Lead Principal Investigator in the Cayuse 424 proposal routing chain.

   b. Enter the person’s last name in the search field and select “Search”.

![Set Next Reviewer](image)
c. Select the person’s name under Search Results, and then select “Set Next Reviewer”.

d. Select “Close” when the routing chain is complete.
Update a Professional Profile

1. Find and open the Professional Profile.
2. Update the sections as needed. However, **never select the X next to UC Davis**. To change the Department/Unit, select the Dept/Division/Title section and make the appropriate changes. See [Create a Professional Profile](#) for the details of each section.

![Professional Profile](image-url)