Cayuse SP – Quick Reference
Working with SPO on Proposals

Contents
Proposals Quick Reference ..................................................................................................................................................... 2
Prepare and Submit a Proposal .............................................................................................................................................. 3
Certify a Proposal.................................................................................................................................................................... 6
Approve a Proposal................................................................................................................................................................. 8
Proposals Quick Reference

**Proposal Dashboard**
- **Start New Proposal**
- **My Proposals**
- **Proposals In My Unit**
- **Advance Account Inbox**

**Award Dashboard**
- **My Awards**
- **Awards In My Unit**

**Certifications/Approvals**
- **PI Certification Inbox**
- **Unit Approval Inbox**

UC Davis Sponsored Programs
Office
1850 Research Park Drive
Suite 300
Davis, CA 95618
Phone:

Email: orcayusehelp@ucdavis.edu

**Start an Internal Processing Form (IPF).**

Find an IPF that you started or on which you are listed on the Investigators/Research Team tab on the IPF.

View all IPFs submitted through an Administrative Unit/s for which you have Proposal Data Access.

Certify IPFs/proposals for which you are listed as Lead PI or co-PI.

Approval proposals including investigators in your unit.

Email ORCayuseHelp@ucdavis.edu for technical and process assistance or any other Cayuse related issues.
Prepare and Submit a Proposal

View our “tips for avoiding routing and approval issues”.

A green checkmark will display when all system required fields are complete.

Required only if more information is needed, such as when a “Miscellaneous Sponsor” is selected.
Read the top of each tab for completion instructions and other key information.

Allocation of Credit

- Allocation of credit is used for reporting and must total 100%.
- Allocation of credit will allow reporting options that have been requested by the deans on campus.
- For example, a proposal with 3 investigators in 3 different colleges might have allocated credit of 20%, 30% and 50% among the investigators.
- When the proposal is reported, the respective colleges will receive 20%, 30% and 50% of the credit.
- Standard reporting based on the Admin Unit identified on the General Information page will still be possible.
- Allocated credit will not be used to proportionally distribute recovered F&A on an awarded project.
- Agreements on distribution of F&A on multi-unit proposals should be documented as an attachment (see Proposal Attachments page) to the proposal.
- NOTE: If the “Allocation of Credit” column is not completed by the requesting department, SPO will allocate equal credit to each listed personnel.

NOTE: The sum of allocated credit on this proposal is currently 0%.

Add Personnel Information

- Last Name:
- First Name:
- Phone:
- Email:
- Person Months:

- Unit:
- Role: Lead Principal Investigator
- Sponsored Effort %:
- Cost Shared Effort %:
- Allocation of Credit %:

Save Personnel

List of Personnel:

<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>Patricia Applegate</td>
<td>Med: Div Of Internal Med (Use PI's Int Med Dept.)(049014)</td>
<td>Lead Principal Investigator</td>
<td>30%</td>
<td>0%</td>
<td>30%</td>
<td>100%</td>
<td>3</td>
</tr>
</tbody>
</table>

Correct any errors before leaving each tab.
Re-order the Approving Units list as needed due to “rollup units”. Order rollup units after the unit they are rolling-up from.

Qualifying text in parenthesis () is only OK if the unit is a rollup unit.
Certify a Proposal

Cayuse SP will email the Lead Principal Investigator and any co-Principal Investigators to request certification. The Lead Principal Investigator and all co-Principal Investigators must certify IPFs **before** assignment to a Sponsored Programs analyst.

Select the Proposal No.

View IPFs requiring your certification.

Open the Proposal.
Review the proposal for accuracy and completeness. Then select “Certify Proposal”.

Read the statements and select “Submit Certification”.
Approve a Proposal

- View IPFs requiring your approval.
- Select the Proposal No.
- Open the IPF to view details.
- Ensure PI and co-PI Certifications.
- Indicate if Authorize or Reject from here or the IPF.