Online Proposal Creation
and
Automatic Routing
Welcome to Cayuse 424. Please contact your sponsored programs manager with any questions.
Overview of Workshop

In this workshop we will:

- Review proposal submission and project management cycle
- Review PI and OSP Manager roles
- Provide an overview of the electronic creation, routing, and submission of grant and contract proposals for external funding
- Cover sign in and electronic routing in detail
- Review the process for uploading documents
- Review Professional Profiles
Sponsored Program Administration
Proposal Submission (pre-award) and Project Management (post-award)

Life Cycle of a Sponsored Project

Proposal Development
Internal Clearance
Proposal Submission & Sponsor Review

Annual Progress Report

Project Closeout: Final Report, etc.

New Project Notify SPA of Intent to Submit

Competing Continuation

Establish New Project Account
Award Negotiation & Acceptance

Sponsored Program Administration

Project Monitoring

Spending Money

Non-competing Continuation

Project Completion

Post-Award Processes

Transition from Pre-Award to Post-Award

Pre-Award Processes
Our Respective Roles – Overview

- As Principal Investigator or Project Director your role is to put your best effort into creating your proposal narrative, ensuring accuracy, integrity, and compliance.

- The SJSU Research Foundation role is to help ensure completeness and compliance in the budget and in the overall submitted proposal package.

- PI and SJSURF work together through the proposal preparation and proposal routing processes.
Principal Investigator Role – Expanded

Principal Investigator:

- Notifies the SJSU Research Foundation and reads Program Guidelines
- Works with SJSU Research Foundation on budget preparation
- Provides proposal documents to Manager for routing and uploading
- Obtains peer review
- Allows at least 7-14 calendar days for campus routing
- Plans for the SJSU Research Foundation to submit at least two days in advance of the sponsor deadline
Sponsored Program Manager Role – Expanded

Sponsored Programs Manager:

- Reviews guidelines and provides guidance and interpretation
- Assists with budget preparation
- Accepts and prepares proposal documents for routing
- Ensures compliance to guidelines-format, content, regulations
- Facilitates review and approval by SJSU campus signers
- Provides quality assurance review
- Submits proposals two days or more before sponsor deadline
Proposal Process

Proposal Preparation → Routing → Submittal

- Campus routing consists of review and signatures of the
  - PI
  - Co-PIs
  - SJSU employees named in the proposal
  - Chair
  - Dean
  - Sponsored Programs Manager
  - Director, Office of Sponsored Programs
  - SJSU Fiscal Officer
  - SJSU Associate Vice President of Research

- Allow at least 7-14 calendar days for this process; more if multiple PIs, Departments, or Colleges.

- Once signed off by all campus signers we can submit.
Cayuse 424 System Overview

- Fast, easy-to-use web application

- Delivered over a secure web browser connection

- Simplifies the creation, review, approval, and electronic submission of grant proposals

- Helps organizations of all sizes accelerate proposal development and improve the quality and accuracy of proposal applications.

- Designed with the belief that there should be as few barriers as possible between scientific research and federal funding sources
What’s In It For You—The Benefits

- Streamlined Process
- 24/7 Accessibility
- Faster Routing
- Total Picture View
- Ability to Make Edits (where applicable)
- Ability to Monitor Development and Routing Progress
The Process

- Download Application
- Proposal Development
- Internal Routing and Clearance
- Submission
Fwd: Cayuse424 System Notification: proposal awaiting your attention (Due: 04/30/2014)

1 message

Richard Chavez <richard.chavez@sjsu.edu>
To: Michele Vaccaro <michele.vaccaro@sjsu.edu>

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Wed, Apr 16, 2014 at 1:26 PM

From: <>

Date: Tue, Apr 15, 2014 at 2:51 PM

Subject: Cayuse424 System Notification: proposal awaiting your attention (Due: 04/30/2014)

To: Ricky Chavez <richard.chavez@sjsu.edu>

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Due to a modification of the routing chain, the following proposal, due on Wednesday, April 30, 2014, now requires your attention:

Development of Glass Facility Energy Audit Tools and Recommendations

Please navigate to http://sjsu.cayuse424.com/proposal.do?proposalId=1001798803 at your earliest convenience.
Signing In

https://sjsu.cayuse424.com/
Signing In

https://sjsu.cayuse424.com/

Everyone has been set up.

- **Username:** Your first initial and your last name (Example: *jsmiths*).

- **Password:** Please contact your Sponsored Programs Manager to obtain.
Welcome to Cayuse 424. Please contact your sponsored programs manager with any questions.
Cayuse Routing Hot List

Showing 2 out of 2 proposals which may soon require action...

- Proposal: Ardalan MV0507-01, Steps away: 4, Days old: 132
- Proposal: Chiao MV0718-01, Steps away: 4, Days old: 77
Cayuse Proposal Screen
Snapshot: Left Panel Upper Menu

- Required Federal Forms
- Required Agency Forms
  - Project Information
  - Key Personnel
  - Budget Forms
  - Attachments
Proposal in Cayuse
Snapshot: Left Panel Lower Menu

- Proposal Summary

- Proposal Management
Uploading Internal Clearance Documents
Reviewing Proposals in Cayuse
Routing and Approval Chain

Routing Chain
- Chavez, Ricky - SJSU Research Foundation: SJSU Research Foundation
- Young, Gregory - SJSU Research Foundation: Chemicals & Materials Engineer
- Vaccaro, Michele - SJSU Research Foundation: SJSU Research Foundation
- Dittman, Jeanne - SJSU Research Foundation: SJSU Research Foundation

Routing History

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<td>Modify</td>
<td>2014-09-30 11:46</td>
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Cayuse Process Recap

- Proposal Application has been created
- Budget has been completed
- All final documents have been uploaded into the application
- Manager has prepared required internal clearance documents and uploaded them into Cayuse
- Manager now creates routing chain
- Proposal Processing Coordinator initiates routing process in Cayuse
Cayuse Process Recap

PI identifies the opportunity and notifies the sponsored programs manager.

Sponsored programs manager or PI:

- Logs into Cayuse, locates, and downloads the opportunity
- Creates the official proposal application
- Initiates the proposal routing package in Cayuse
Cayuse Process Recap

Sponsored programs manager or PI:

- Assigns a unique identifier
- Assigns a PI to the proposal
- Assigns the budget period (1-5 years) based on guidelines
- Assigns indirect cost (facilities and administrative) rate based on guidelines
Professional Profiles

**Vaccaro, Michele**

**General Personal Information**
- Name
- Degrees
- Demographics
- Biosketches

**1 Institutional Association**
- SJSU Research Foundation (SJSU Research Foundation)
  - Contact Info
  - eRA Role
  - Dept / Division / Title
  - Salary and Fringe Worksheet
  - Performance Site

Routing Profile

**Name**
- Prefix: Ms.
- First: Michele
- Middle: 
- Last: Vaccaro
- Suffix: 

NIH Commons ID: MVACCARO

NASA NSPIRES ID:
Questions and Answers
Learn More! Fall 2014 Workshops

November 13, 2014
SJSU Research Foundation
Managing Your Externally-Funded Project
MLK Library 255/257
11:30am – 1:00pm

December 3, 2014
SJSU Research Foundation
Industry Agreements—Do’s and Don’ts
MLK Library 255/257
11:30am – 1:00pm
A Celebration of SJSU Sponsored Research

Monday, November 17, 2014
4:00-6:00 pm

Featuring Program Exhibits and Presentations by Externally Funded Faculty and Staff