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# Introduction to Cayuse424

# Agenda

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- Overview and features of Cayuse424
- Cayuse424 Step-by-Step
- Proposal Creation Process and Demonstration
  - SF424 Cover Page
  - Building a budget
  - Agency-specific considerations
- Managing Profiles (helpful when completing Key Personnel information)
  - Providing access to other users
- Resources
  - Browser settings
  - Other recommendations
- Getting Help

# Overview

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- Cayuse424 helps to facilitate proposal submission
  - Automates proposal preparation and streamlines proposal validation and submission
  - Grants.gov then submits to the Federal Agency
  - Cayuse4242 is currently available for NIH, HRSA, NSF, & USDA and is dependent on the Funding Opportunity Announcement (FOA)



# Features

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- Standard data automatically loaded into forms, e.g., institutional and investigator information
- Some automated budget functions
- Proposal can be previewed and/or printed
- Errors/warnings are monitored throughout the process
- Authorized** users can share proposal access

# Step-by-Step

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- Request access to Cayuse424 through the RF Help Desk
  - [rfhelpdesk@osu.edu](mailto:rfhelpdesk@osu.edu)
- Review “Getting Started” guide to configure browser
  - Allow cookies and pop-ups for Cayuse424; enable JavaScript
- Access: <https://cayuse.rf.ohio-state.edu:8443/V8/>
  - Login = OSU Internet User Name (name.#);  
password = “password”; be sure to change password

# Step-by-Step (continued)

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- Review and update **Professional Profile** as necessary; facilitates the autofill feature on forms
- Select the appropriate *Funding Opportunity Announcement* (FOA)
- Complete the proposal forms identified in FOA, and the required associated documents e.g., budget justifications
- Route forms to SPO for review and signature

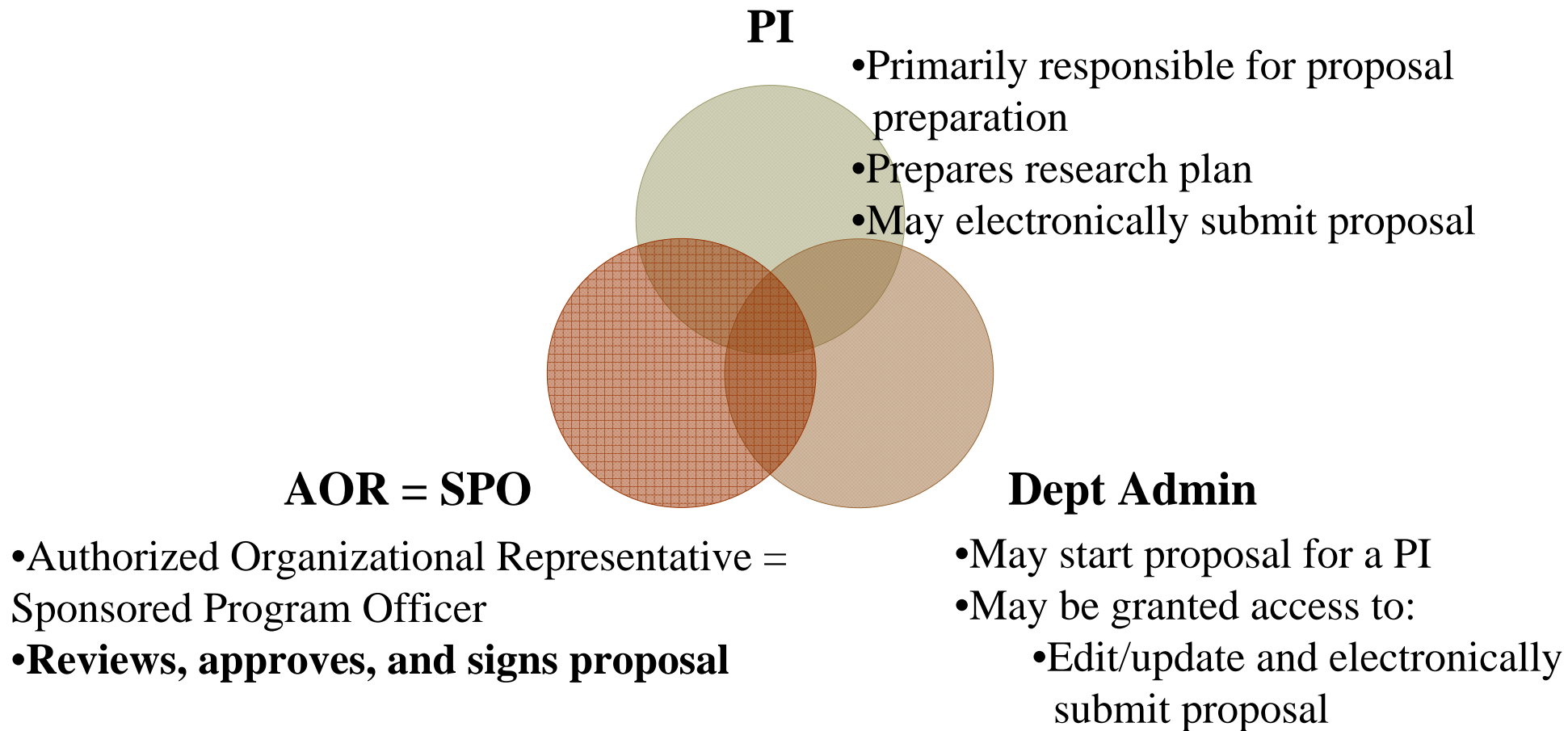
# Step-by-Step (continued)

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- In parallel, create Research Plan and any other attachments as Word documents
- Convert attachments to pdf format
- Attach documents to the completed/signed administrative proposal
- Submit proposal to **Grants.gov**

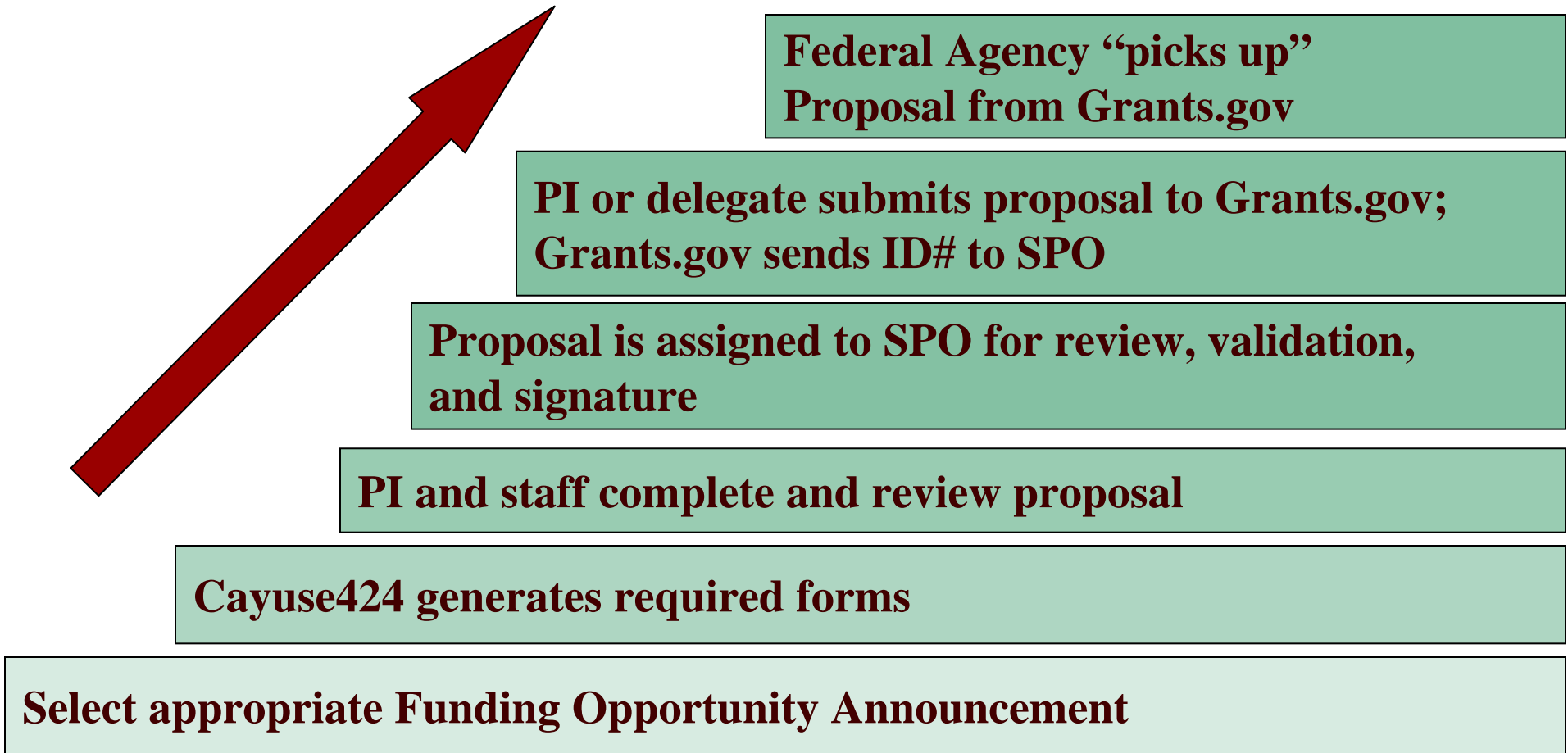
# Three Types of Users

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# Proposal Creation Process

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# Cayuse424 Three Components

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1. Reviewing and updating Professional Profile  
(only Senior Key Personnel)
2. Completing the SF424 (R&R) Forms
3. Routing and submitting

# Demonstration

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- Let's create a sample proposal with:
  - One co-investigator
  - Detailed budget
  - Three budget periods
  - Subaward



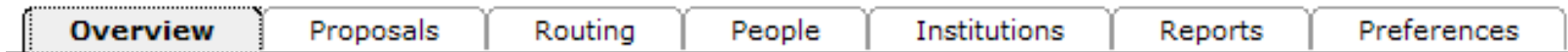
**Username:**

**Password:**

Enter Cayuse 424

Username = name.#  
Password = password  
Change password after  
initial login.

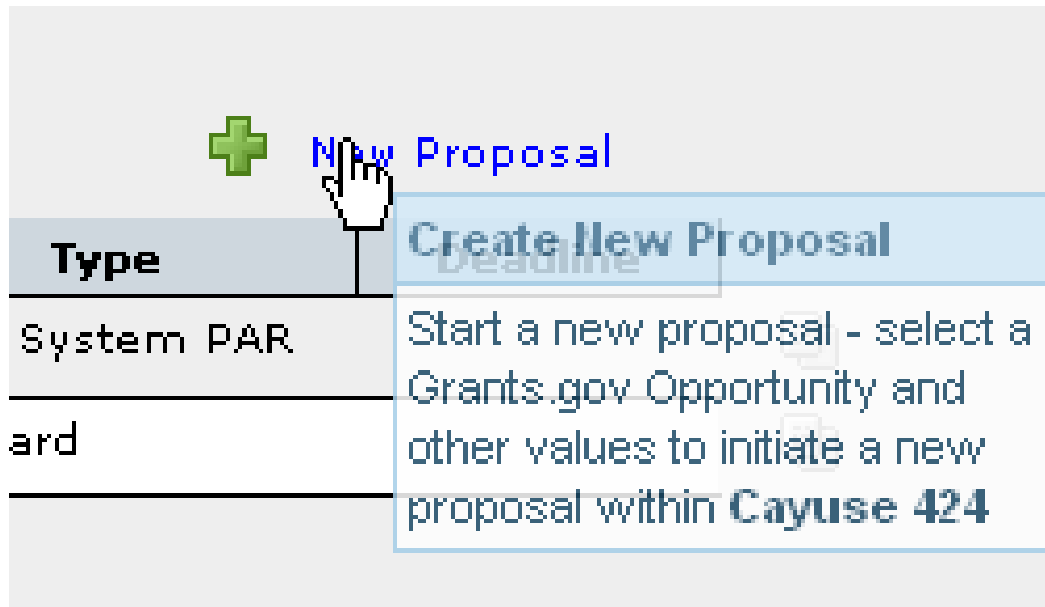
# Cayuse Main Menu Navigation



The screenshot shows the Cayuse interface. At the top left is the Cayuse logo. Below it, the text reads 'The Ohio State University Research Foundation' and '10064/v3.2.7\_release'. A list of menu items is displayed: 'Proposals' (with a document icon), 'Routing' (with a folder icon), 'Professional Profiles' (with a person icon), 'Institutional Profiles' (with a document icon), 'Reports' (with a bar chart icon), 'Preferences' (with a gear icon), and 'Resources' (with a question mark icon). A green callout box with the text 'Two ways to navigate: with tabs or links' has two arrows pointing to the 'Overview' tab and the 'Proposals' link.

**The Cayuse update is complete! If you have any problem using this system, please contact us at [rfhelpdesk@osu.edu](mailto:rfhelpdesk@osu.edu).**

# Cayuse Icons



The screenshot shows a user interface element for creating a new proposal. A green plus sign icon is positioned above the text 'New Proposal'. A mouse cursor is hovering over this text, which has triggered a tooltip. The tooltip contains the following information:

| Type       | Create New Proposal   |
|------------|---|
| System PAR | Start a new proposal - select a Grants.gov Opportunity and other values to initiate a new proposal within <b>Cayuse 424</b> |

Hover over icon to view description






# Updating Professional Profile

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- Update personal information since Profile information autofills proposal forms:
  - Name, academic degrees, and other demographic information; may choose to attach Biosketch(es)
- Institutional Association has already been recorded**
- Update Contact Info, eRA Role, and Dept/Division/Title
- Currently not using Salary and Fringe Worksheet
- Verify Routing Profile has been assigned to your SPO

# Professional Profile


 Professional Profile: Askwith, Candice C 




## Review and update Contact Info


**General Personal Information**

- Name
- Degrees
- Biosketches

**1 Institutional Association** 

 **"SBS-Neuroscience"**  
**The Ohio State University Research Foundation**

Inst. association "nickname"

 **Contact Info**

- eRA Role
- Dept / Division / Title
- Salary and Fringe Worksheet
- Routing Profile


"SBS-Neuroscience"

**Contact Info**

**Address 1:**


**Address 2:**

**City:**

**State/Province:**  

**Zip/Postal Code:**

**County:**

**Country:**  

**Phone:**

**Fax:**

**Email:**

# Error/Warnings

Links provide access to fields needing a correction

37 Errors / 4 Warnings

Use limited validations ?

**Error:** [Other Project Info 5a] You must answer [question 5a \(international partners\)](#) by selecting Yes or No

**Error:** [KeyPerson PD/PI][NIH] The eRA Commons Username must be submitted for the PD/PI in the [PD/PI Credential field](#) on the Senior/Key Person page.

**Error:** [KeyPerson PD/PI] [Biosketch](#) must be attached

**Error:** [KeyPerson 1] [Project Role](#) must be filled in

# Setting Permissions: Proposal Permissions



## Proposal Permissions

+ Add user/group

Recommended PI  
permission settings



Agnoli,  
Jeff  
(agnoli.1)

| List                                | Read                                | Write                               | Attach                              | Break<br>Lock                       | Delete                              | Print                               | Change<br>Permissions               | Add<br>User/Group                   | Remove<br>User/Group                |
|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

# Application Due Dates

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- ❑ Research Foundation recommends that proposals be submitted to SPO at *least five business days prior* to the submission deadline
- ❑ Submit proposals *at least 48 hours prior* to the proposal deadline to ensure acceptance by the agency

# Getting Help

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- Attend a practice lab for hands-on support, <http://rf.osu.edu/inf/e-cal.cfm>
- Work with your Sponsored Program Officer
- Send questions to the Research Foundation Help Desk at 688-8288 or [rfhelpdesk@osu.edu](mailto:rfhelpdesk@osu.edu)
- Check the Research Foundation web site: <http://rf.osu.edu/> or the RF Cayuse424 resources page, <http://rf.osu.edu/cayuse424> for additional information