In this module you will learn:

- What a professional profile is
- How to find an existing professional profile
- How to create a professional profile
- How to add biosketches to a profile
- How to assign permissions to a profile
- How to avoid duplicate profiles
- How to link a Cayuse 424 user account to a professional profile
What is a Professional Profile?

- Professional profiles capture and store data about Principal Investigators, Key Personnel, Other Significant Contributors, AORs, Signing Officials, and other important personnel.
- Before you create a proposal, locate or create professional profiles for the personnel who will be named in the proposal.
Information stored in a person’s professional profile is autofilled into a proposal when the person is selected as a:

- PI
- Senior/Key Person
- Authorized Representative (AOR)
- Administrative Contact
- Payee

Professional profiles stored in Cayuse 424 can be shared with others and re-used for each proposal.
Finding a Professional Profile

1. Click the **People** tab
2. Enter the person’s first or last name in the search box.
3. Click **Search**.

If you find a profile for the person, you will not need to create one.
Profile Development Steps

1. Create a professional profile.
2. Associate the profile with an institution.
3. Complete the profile fields.
4. Attach available biosketches.
5. Add appropriate users to the profile’s permissions area.
6. Link the person’s user account to the professional profile.
1. Sign in to Cayuse 424 and click the **People** tab.
2. Click the Add Person button:
3. Enter the person’s name.
4. Click **Create New Profile**.

5. The profile will be created with fields for basic biographical information:
Once the profile is created, you should add an institutional association. The institutional association holds:

- Position title and department
- Contact information
- Salary and fringe rates
1. Click the add button next to **Institutional Associations** in the professional profile:
2. Select the institution using the drop-down menu.
3. Click **Create Institutional Association**.
Completing the Professional Profile

Click each section to enter the relevant information.

- Name
- Degrees
- Demographics
- Contact Info
- eRA Role
- Dept / Division / Title
- Salary and Fringe Worksheet
- Performance Site
Salary and Fringe Worksheet

- Enter an appointment type (calendar or academic/summer months).
  - Enter salary information if desired.
  - If Appointment Type is not entered, Cayuse 424 will not be able to auto-calculate salary on budget forms.
- Base Fringe Rate is added automatically if the person’s institution has a base rate.
- Fringe rate categories can be imported from the institutional profile by clicking Import Institutional Rates.
- To add additional Fringe Rates, click New Row, enter or select the category, and add a dollar amount or percentage.
Selecting an eRA role means the person’s profile will appear when searching for people to add to the proposal in that role.
Principal Investigator: Displays person as an option when selecting a PI.

Administrative Official: Displays person as an option when selecting the “Person to be contacted on matters involving this application”.

Signing Official / “AOR”: Displays person as an option when selecting the Authorized Representative.

Assistant: Does not affect autofill inclusion.

Payee: Displays person as an option when selecting a Payee for Environmental Protection Agency (EPA) proposals.
1. Click + next to Biosketches.

   ![Biosketches](image)

   Currently no Biosketches are filed in Cayuse424 for "Adams, John Quincy".

2. Enter a name for the biosketch and click **Next**.
3. Click **Browse** to locate the PDF version of the biosketch.

4. Click **Next**.

5. Click **Browse** again to attach source (e.g. Word) version of the biosketch. (optional)

6. Click **Done**.
Multiple biosketches can be created and stored in each professional profile.

Once biosketches are attached to the professional profile, they can easily be included on the Senior/Key Persons form of the proposal.
Once a professional profile has been created, permissions can be assigned.

The creator of a professional profile is automatically granted all permissions associated with that profile.

The profile creator can share the profile with other users by granting appropriate permissions.

Permissions can be changed or removed as needed.
1. To grant profile permissions to other users, click the permissions key in the upper right:

2. Click **Add user**.
3. Select a user from the list, or search by first name, last name or username.

4. Click the username in your search results. The user will be added to the permissions.

5. Click Close.
After adding the user to the permissions, select the permissions they should have.

- The default permissions are List, Read, and Autofill.
- Permissions are mostly independent, so if you want someone to be able to edit the profile, be sure to assign Read as well.
## Permission Definitions

<table>
<thead>
<tr>
<th>Permission</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>List</strong></td>
<td>Can see the profile in lists, but cannot view or modify the details of the profile.</td>
</tr>
<tr>
<td><strong>Read</strong></td>
<td>Can view the details of the profile.</td>
</tr>
<tr>
<td><strong>Write</strong></td>
<td>Can modify all data within the profile.</td>
</tr>
<tr>
<td><strong>Autofill</strong></td>
<td>Can autofill the professional profile into a proposal.</td>
</tr>
<tr>
<td><strong>Delete</strong></td>
<td>Can delete the professional profile.</td>
</tr>
<tr>
<td><strong>Change Permissions</strong></td>
<td>Can change security permissions for the professional profile.</td>
</tr>
<tr>
<td><strong>Add/Remove User</strong></td>
<td>Can add or remove other users from the profile permissions.</td>
</tr>
</tbody>
</table>
To prevent confusion, each person should have only one professional profile in the system.

To avoid duplicate profile creation, you see a list of matching names and are asked to verify before creating a new profile.

Institutions can control access to profiles to reduce the chance of creating duplicates.
Now that the profile has been created, the person’s user account should be linked to the profile.

1. Click the **Settings** tab

2. Click **Link this User to a Professional Profile?**

3. Select the new professional profile from the list.

4. The user is now linked and can participate in routing and easily find their own profile.
In this module you learned:

- What a professional profile is
- How to find an existing professional profile
- How to create a professional profile
- How to add biosketches to a profile
- How to assign permissions to a profile
- How to avoid duplicate profiles
- How to link a Cayuse 424 user account to a professional profile
Funding Opportunities

Module 4

Research Suite Product Support
ResearchSuiteSupport@Evisions.com
In this module you will learn:

- What an opportunity is
- How to determine if an opportunity has already been downloaded into Cayuse 424
- How to retrieve opportunities from Grants.gov into Cayuse 424
- How to create a proposal using an opportunity
An opportunity is a grant application package that includes forms and information to submit to Grants.gov.

Proposals can be created using an opportunity once the opportunity has been retrieved (downloaded) into Cayuse 424.

Before starting your proposal, review the opportunities list to determine if the opportunity has already been retrieved.
1. Click the Opportunities tab.
2. Cayuse 424 displays the opportunities that have already been retrieved.
   - Usually you will only see opportunities that are still open.
   - To show closed opportunities, click the checkbox.
The Opportunity List

- Search for opportunities using the search box.
- Sort the list by clicking any of the column headings.
- Click the blue info icon to see detailed opportunity information.
Finding Opportunities

- If you find the opportunity you are looking for in the list, there is no need to retrieve the opportunity again.
- If you can’t find the opportunity, try retrieving it.
- Some institutions centrally control opportunity retrieval.
  - If this is the case at your institution, contact a local administrator to request that they retrieve the opportunity for you.
To retrieve an opportunity from Grants.gov you need the Funding Opportunity Number or CFDA Number.

You can find the Funding Opportunity Number by going to [www.grants.gov](http://www.grants.gov) and using the **Search Grant Opportunities** box or button.
1. In the Opportunities tab, click **Retrieve Opportunities**.

![Retrieve Opportunities button](image)

2. Enter the opportunity number or CFDA number into the corresponding field in the pop-up dialog. The opportunity number should be entered exactly as shown on Grants.gov, including any dashes.

![Pop-up dialog for retrieving opportunities](image)

3. Click **Retrieve Opportunities**.
Cayuse 424 will check Grants.gov for an opportunity package.
If the retrieval is successful, you will see that one or more opportunities were updated.
- If you don’t see the opportunity, you can search for it.

If no opportunities were updated, verify the number you entered, and check that an application package is available on Grants.gov.
- Cayuse 424 cannot download anything if a package is not available.
Using Opportunities

- Click the green plus symbol next to the opportunity to create a proposal using that opportunity.
- Refer to the **Proposal Creation** module for more details.
In this module you learned:

- What an opportunity is
- How to determine if an opportunity has already been downloaded into Cayuse 424
- How to retrieve opportunities from Grants.gov into Cayuse 424
- How to create a proposal using an opportunity
In this module you will learn how to:

- Create a new proposal
- Navigate the proposal
- Assign proposal permissions
- Track proposal history
- Validate the proposal
- Use the proposal lock and break the lock
- Copy and transform proposals
Creating a New Proposal

1. In the opportunities list, click the green plus button next to the opportunity you want to use.

<table>
<thead>
<tr>
<th>#Opportunity Number</th>
<th>Title</th>
<th>Comp. ID</th>
<th>Agency</th>
<th>CFDA #</th>
<th>Opens</th>
<th>Closes</th>
<th>Retrieved</th>
</tr>
</thead>
<tbody>
<tr>
<td>PA-BB-C06</td>
<td>G.q AT07 and NIH Ext-UAT Test FOA (C06)</td>
<td>ADOBE-FORMS-B</td>
<td>National Institutes of Health Stage</td>
<td>93.838</td>
<td>2009-10-05</td>
<td>2012-10-05</td>
<td>2010-02-18</td>
</tr>
<tr>
<td>PA-BB-D43</td>
<td>G.q AT07 and NIH Ext-UAT Test FOA (D43)</td>
<td>ADOBE-FORMS-B</td>
<td>National Institutes of Health Stage</td>
<td>93.838</td>
<td>2009-12-09</td>
<td>2012-12-09</td>
<td>2010-02-18</td>
</tr>
<tr>
<td>PA-BB-D71</td>
<td>G.q AT07 and NIH Ext-UAT Test FOA (D71)</td>
<td>ADOBE-FORMS-B</td>
<td>National Institutes of Health Stage</td>
<td>93.838</td>
<td>2009-12-09</td>
<td>2012-12-09</td>
<td>2010-02-18</td>
</tr>
</tbody>
</table>
2. Enter a **Proposal Name**. *(SU Note: This is for reference purposes only and is not the same as the Proposal Title)*

3. Select a **Principal Investigator** using the provided list and search.

4. Choose the **# of Budget Periods**. *(SU Note: not present in all opportunities)*

5. Choose a **Validation Type**.
   - Determines which agency validations will be used.
   *(SU Note: recommend keeping defaulted Validation)*

6. Click **Create Proposal**.

7. Cayuse 424 creates a proposal using the forms required by the opportunity.
Give some thought to how you name your proposals.

- Consider using a naming convention that will make your proposal easy to locate in the future.
- Your local administrators may suggest a naming convention.
- You can rename the proposal later by clicking in the name field and entering a new name.
Forms are listed in the left-side navigation bar.

- Checkboxes control which forms are submitted to the agency.
  - Mandatory forms are automatically checked and cannot be unchecked.
  - Optional forms can be checked to include them in the submission.

- Page numbers take you to each form page.
Navigating the Proposal

The Proposal Management areas have special icons to manage your proposal:

- Upper right corner
- Lower left sidebar
Proposal Permissions

- Proposal permissions are different from professional profile permissions.
- The proposal creator is given full permissions.
- Proposal permissions must be given to other users who need access to the proposal, such as:
  - Principal Investigators
  - Research Administrators
  - Reviewers
1. To give permissions to other Cayuse 424 users, click the permissions key.

2. Click Add user.

3. Select a user from the list, or search by first name, last name or username.

4. Click the username in your search results to add the user to the permissions.

5. Click Close.
Once the user is added, check or uncheck specific permission(s) as needed:

- Permissions are mostly independent, so be sure to give each user every permission they will need.

<table>
<thead>
<tr>
<th></th>
<th>List</th>
<th>Read</th>
<th>Write</th>
<th>Attach</th>
<th>Break Lock</th>
<th>Delete</th>
<th>Print</th>
<th>Change Permissions</th>
<th>Add User/Group</th>
<th>Remove User/Group</th>
</tr>
</thead>
<tbody>
<tr>
<td>Heldens, John (jheldens)</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Spears, Michael (mspears)</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>☐</td>
<td>✔</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
</tbody>
</table>
## Permission Definitions

<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>List</td>
<td>Can see the proposal in lists, but cannot view or modify the details of the proposal.</td>
</tr>
<tr>
<td>Read</td>
<td>Can view the details of the proposal.</td>
</tr>
<tr>
<td>Write</td>
<td>Can modify all data within the proposal and run Final Review.</td>
</tr>
<tr>
<td>Attach</td>
<td>Can attach documents to the proposal.</td>
</tr>
<tr>
<td>Break Lock</td>
<td>Can take write access while another user is in the proposal.</td>
</tr>
</tbody>
</table>
## Permission Definitions

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delete</td>
<td>Can delete the proposal.</td>
</tr>
<tr>
<td>Print</td>
<td>Can print the proposal.</td>
</tr>
<tr>
<td>Change Permissions</td>
<td>Can change security permissions for the proposal.</td>
</tr>
<tr>
<td>Add/Remove User</td>
<td>Can add or remove other users from the profile permissions.</td>
</tr>
<tr>
<td>Submit</td>
<td>Can submit the proposal to Grants.gov.</td>
</tr>
</tbody>
</table>
Proposal History logs include the date and time, username, and a summary for the following actions:

- Create Proposal
- Upload/Delete Attachment
- Save Proposal (includes form changes)
- Approve/Retract Proposal (routing comments are logged)
- Validate Proposal

The Proposal History can be filtered by date and/or exported as a Comma Separated Values (CSV) file.
<table>
<thead>
<tr>
<th>Date/Time</th>
<th>Username</th>
<th>Person</th>
<th>Action</th>
<th>Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012-07-19 13:06</td>
<td>cayuseadmin</td>
<td>Cayuse Admin</td>
<td>Save Proposal</td>
<td></td>
</tr>
<tr>
<td>2012-07-19 13:06</td>
<td>cayuseadmin</td>
<td>Cayuse Admin</td>
<td>View Proposal</td>
<td>Opened for edit</td>
</tr>
<tr>
<td>2012-07-19 12:05</td>
<td>cayuseadmin</td>
<td>Cayuse Admin</td>
<td>Save Proposal</td>
<td>RR_OtherProjectInfo</td>
</tr>
<tr>
<td>2012-07-19 12:04</td>
<td>cayuseadmin</td>
<td>Cayuse Admin</td>
<td>Upload Attachment</td>
<td>RR Other Project Information: MentoringPlan (PDF)</td>
</tr>
<tr>
<td>2012-07-19 12:04</td>
<td>cayuseadmin</td>
<td>Cayuse Admin</td>
<td>Save Proposal</td>
<td>RR_OtherProjectInfo</td>
</tr>
<tr>
<td>2012-07-19 12:04</td>
<td>cayuseadmin</td>
<td>Cayuse Admin</td>
<td>Upload Attachment</td>
<td>RR Other Project Information: DataManagementPlan (PDF)</td>
</tr>
<tr>
<td>2012-07-19 12:04</td>
<td>cayuseadmin</td>
<td>Cayuse Admin</td>
<td>Save Proposal</td>
<td>RR_OtherProjectInfo</td>
</tr>
<tr>
<td>2012-07-19 12:04</td>
<td>cayuseadmin</td>
<td>Cayuse Admin</td>
<td>Upload Attachment</td>
<td>RR Other Project Information: DataManagementPlan (PDF)</td>
</tr>
<tr>
<td>2012-07-19 12:03</td>
<td>cayuseadmin</td>
<td>Cayuse Admin</td>
<td>Save Proposal</td>
<td></td>
</tr>
<tr>
<td>2012-07-19 12:03</td>
<td>cayuseadmin</td>
<td>Cayuse Admin</td>
<td>View Proposal</td>
<td>Opened for edit</td>
</tr>
<tr>
<td>2012-07-19 11:56</td>
<td>cayuseadmin</td>
<td>Cayuse Admin</td>
<td>Save Proposal</td>
<td>RR_OtherProjectInfo</td>
</tr>
<tr>
<td>2012-07-19 11:55</td>
<td>cayuseadmin</td>
<td>Cayuse Admin</td>
<td>Delete Attachment</td>
<td>RR Other Project Information: DataManagementPlan</td>
</tr>
</tbody>
</table>
Cayuse 424 keeps a running total of all errors and warnings.

As you correct errors and warnings, the running total decreases.

Proposals that are submitted with errors will be rejected by Grants.gov or the granting agency unless your opportunity specifically instructs you to the contrary.

Be sure if you are submitting a proposal with warnings that you have determined the warning will not cause the proposal to be rejected or delayed by the granting agency.

Info items offer advice for successful application completion and submission.
Proposal Validation

- Click the **Error/Warning/Info** button at the bottom of the proposal page to display more details.
- If you click the **linked text**, Cayuse 424 will take you directly to the field that is causing the message to appear.
When you are working in a proposal, other users who can see that proposal will see the lock icon next to it in the Proposals List, followed by your username.

- This indicates that the proposal is locked and you are working in the proposal.

- Only users with the “Break Lock” permission for the proposal can open the proposal for editing when it is locked by another user.

- Others can open the proposal in read-only mode.
  - They will not be able to enter data or add attachments.
If you have “break lock” permissions, you can “take the lock” from another user working in the proposal.

- This will cause them to lose any unsaved data.
- Contact the user first if possible to ensure they have saved their work.

1. Open the proposal from the list using the read-only icon
2. Click the lock icon at the top of the proposal.
3. Click OK in the dialog.
Copying or Transforming a Proposal

- Copying creates a duplicate copy of an existing proposal.
- Transforming pulls data from an existing proposal into a new proposal for a different opportunity.

To begin the process:

1. Click on the **Proposals** tab and locate the proposal you would like to copy or transform.

2. Click the **Copy/Transform** icon to the right of the proposal.
3. To copy the proposal, click **Copy Proposal** in the dialog.

4. Give the proposal a new name and due date.

5. Click **Copy Proposal**.

6. You’ll see both the original and the copy in the Proposals List.
3. To transform the proposal, click **Transform Proposal**.

4. Select a new opportunity from the list using the green plus icon.
   - You can search for the new opportunity.
5. Give the proposal a new name and due date.

6. Click **Transform Proposal**.

7. You’ll see both the original and the transformed proposal in the Proposals List.

The transformed proposal will contain data from any forms that the opportunities have in common.
In this module you learned how to:

- Create a new proposal
- Navigate the proposal
- Assign proposal permissions
- Track proposal history
- Validate the proposal
- Use the proposal lock and break the lock
- Copy and transform proposals
Developing Your Proposal

Module 6

Research Suite Product Support
ResearchSuiteSupport@Evisions.com
Objectives

In this module you will learn how to:

- Autofill data into the proposal
- Add Performance Sites
- Add and sort Key Persons
- Attach biosketches
Autofill

- Use the autofill pencil icon-pencil to autofill fields.

- Autofilled information comes from professional or institutional profiles.

- If profile information changes during the proposal preparation process, you can re-autofill to import the most recent information using the green refresh arrows.

- When you add a person or institution using autofill, Cayuse 424 also autofills other logically connected fields.
  - Applicant Organization and Principal Investigator data are usually autofilled during proposal creation.
1. Locate the section of the proposal you would like to autofill (e.g. Authorized Representative – Box 19 on the SF 424 Face Page).

2. Click the autofill pencil:
3. Select the person you want to autofill.
   - Use Show All or search if you don’t see their name.
4. Click **Add Authorized Representative**.
5. The person’s data is autofilled into Box 19:
1. Add an existing performance site by selecting the autofill pencil.

2. Select a site from a professional profile:
If you don’t see a performance site for a key person, make sure their professional profile has performance site information and the site is marked as active:
Add, edit, or autofill Senior/Key Persons

- Adds Key Personnel on the budget form when they are autofilled into the Key Persons form

- You can add as many Senior/Key Persons as are allowed
  - Cayuse 424 auto-generates an overflow PDF for any key persons beyond the number of slots on the form and attaches it to the proposal

- Sort button automatically orders the Key Persons list by role and name on the Key Persons form.
1. Navigate to the **Key Persons** form.

2. Click the autofill icon to add a new person.
Autofill: Senior/Key Persons

3. Search for or select the person you want to add.

4. Click **Add Selected Key Person**.
Autofill: Senior/Key Persons

5. Key person data can be edited in the Manage Key Person window:
In the Manage Key Persons window you can:

- Re-autofill from a professional profile.
- Change the Project Role.
- Select budget periods on which the Key Person will be named by checking or un-checking the **Budget Period** boxes.
- Attach biosketches.
- Change effort and salary information.
- Copy salary information across budget periods or automatically escalate it (see Module 7 – Proposal Budgets).
If you enter base salary numbers, fringe rates, and effort months, Cayuse 424 auto-calculates **Requested Salary**, **Fringe Benefits** and **Funds Requested**.
Adding a Senior/Key Person “on the fly” allows you to quickly create a Professional Profile from within the proposal.

1. From the **Key Persons** form (or the Key Persons section of the detailed budget form), click the autofill pencil 🖋.

2. Click the **Create New Professional Profile** button in the Add Key Person window:

3. Enter the first and last names and click the **Create New Profile** button:
4. Fill out the **Create New Key Person** form and click the **Save Key Person** button.

5. A professional profile will be created and the person will be added to the Senior/Key Persons form and the budget form.
Once you have added all key persons, click the **Sort** button to order your list.

- PD/PI roles will appear first.
- OSC roles will appear last.
- Other people will be in alphabetical order.
1. Expand the key person’s listing by clicking on the plus sign:

2. Click **Add Attachment** next to Attach Biographical Sketch:
3. From the **Attach Biosketch** window, you can attach the PDF and the Source (Word) file from:

1. The professional profile (top)
2. A file on your local computer (bottom)
In this module you have learned how to:

- Autofill data into the proposal
- Add Performance Sites
- Add and sort Key Persons
- Attach biosketches
Proposal Budgets

Module 7

Research Suite Product Support
ResearchSuiteSupport@Evisions.com

cayuse 424
Electronic Proposal Development and Submission
In this module you will learn:

- Basic budget concepts that apply to all types of budgets
- How to use Cayuse 424 to create a:
  - Detailed budget
  - Modular budget
  - Subaward budget
Basic Budget Concepts

- Senior/Key Persons information, including salary, appointment type, and fringe rate amount, is autofilled from professional profiles when available.

- Automatic budget calculations are made once salary, effort, and other amounts are specified.

- Users can override autofilled or calculated data in most fields.

- Cost replication and escalation for all budget categories on multiple budget periods is quick and easy with Replicate/Escalate.
Salary and fringe information for PIs and Senior/Key Persons can be added to the professional profile.

Enter the appointment months and the corresponding salary based on appointment type.

Select fringe rates from the institutional profile, or enter individual Fringe manually.
  - Use Add New Row for additional rates.
When adding Key Persons to the proposal, their appointment and salary data will be included.

Use Manage Key Persons to indicate appropriate effort:

You can manually change autofilled or calculated information in Manage Key Persons or on the budget:
If you override a calculated field, the system will insert a red star adjacent to the field.

Once a field has been overwritten, the calculated value will no longer show in that field.

- Delete the entered value and click out of the field to see the calculated value again.
Indirect Cost types and rates are stored in the institutional profile:

- If the organization you selected for the proposal has indirect cost types, those will be available to you for selection when you are creating your budget.
Cayuse 424 supports up to ten budget periods.

- The maximum available for an opportunity is dependent on the form included in the opportunity.
- The number of Budget Periods can be changed after the proposal is created.
- When working with multiple budget periods, it is important to enter or select the correct data for all budget periods.
Click on a calendar icon to manage the budget periods:

You can select your project dates in several places:

- Detailed budget form
- Modular budget form
- SF424 R&R Page 1
1. You can change the number of budget periods if necessary.

2. Select the **Period Length** using the drop-down menu. **Custom** is available for unusual budget period lengths.

3. Click on the calendar icon to select a date.

4. Click the **Update Periods** button to update the proposal.
Managing Budget Periods

- Use the **Budget Period** drop down menu or navigation arrows to view and edit different budget periods:

![Proposals List](image-url)
Section B: Other Personnel

Manually enter:

- Number of Personnel
- Role
- Effort Months
- Requested Salary
- Fringe Benefits

Cayuse 424 automatically calculates the Funds Requested value.

<table>
<thead>
<tr>
<th>Number of Personnel</th>
<th>Project Role</th>
<th>Cal. Months</th>
<th>Acad. Months</th>
<th>Sum. Months</th>
<th>Requested Salary ($)</th>
<th>Fringe Benefits Requested ($)</th>
<th>Funds Requested ($)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>Post Doctoral Associates</td>
<td>12.00</td>
<td></td>
<td></td>
<td>36,600</td>
<td>6,250</td>
<td>42,850</td>
</tr>
<tr>
<td>1</td>
<td>Graduate Students</td>
<td>3.00</td>
<td></td>
<td></td>
<td>6,500</td>
<td>425</td>
<td>6,925</td>
</tr>
</tbody>
</table>

The table above shows the details of other personnel, including their roles, effort months, and the calculated funds requested.
Section B: Adding Other Personnel

- Select the **Indirect Cost Type for Sections A and B** using the drop-down menu.

- The default indirect cost type for this section (if one is defined in the institutional profile) is autofilled during proposal creation.

- This selection is necessary to calculate the budget totals.
1. Click **New Equipment Row**.
2. Enter the **Equipment Item**.
3. Enter **Funds Requested**.
4. Select the **Indirect Cost Type** using the drop-down menu. (The default is usually excluded.)
Sections D, E, F and J: Additional Funds

1. Select the correct **Indirect Cost Type** using the drop-down menu.
   - The default indirect cost type for this section (if one is defined in the institutional profile) is autofilled during proposal creation.

2. Enter **Funds Requested ($)** for each applicable line item.
Select any additional **Indirect Cost Types** in the proposal using the drop-down menu.

- The default indirect cost type selecting during proposal creation is autofilled here.

When an indirect cost type is selected:

- The indirect cost rate and base will be filled in.
  - This may be a composite rate if the IDC rate is escalating.
- Funds Requested ($) will update.
- The values will be included in the cumulative budget calculations.
If you are requesting funds for specific budget line items and would like to replicate that data across multiple budget periods, you can do so by following these steps:

1. Click 🏛️ on the **SF424 RR Budget** page
2. Check the box next to the budget category or categories you want to replicate.

3. Select the budget period(s) you want to include that data.

4. Click **Replicate Starting Budget Period Without Escalation**.
   - The first period numbers for the selected category replicate into the budget periods you chose.
Escalation is like replication, but uses a percentage increase per budget period.

The procedure is similar to data replication.

1. Click on the SF424 RR Budget page
2. Check the box next to the budget category or categories you want to escalate.
   - If necessary, change the rate to what you want.

3. Select the budget periods that you want to escalate to.

4. Click **Escalate Selected Categories**.
   - The first period numbers for the selected category escalate into the budget periods you chose.
The **Cumulative Budget** page displays totals for all categories and expenditures indicated in the detailed budget pages.

- Cumulative budget totals are calculated by the system and cannot be overridden.
  - If you find an error, correct it on the source page and the cumulative budget number will automatically be updated.
Creating the detailed budget in Cayuse 424 will automatically create a modular budget and round up to the nearest module.

- We recommend using this method to create a modular budget.

You can also enter modular budget figures directly into the Modular Budget page.

If you are submitting a modular budget, you cannot submit subawards as well. Use the Worksheet Rows function described in Module 8 – Subawards to help with your calculations.
The Subaward Budget

- The Subaward Budget form behaves exactly like the detailed budget form, including getting Key Person information from the Key Persons form.
- The most common budget issue in subawards is missing indirect cost types.
  - If you can’t select different indirect cost types, the subaward organization probably does not have them.
    - At most institutions, you’ll need to contact an administrator to add cost types to the subaward organization’s institutional profile.
  - After they are added, use the green arrows to re-autofill the organization.
In this module you learned:

- Basic budget concepts that apply to all types of budgets
- How to use Cayuse 424 to create a:
  - Detailed budget
  - Modular budget
  - Subaward budget
Subawards

Module 8

Research Suite Product Support
ResearchSuiteSupport@evisions.com
In this module you will learn how to:

- Create a subaward
- Link a subaward to a prime proposal
- Import a subaward
- Export a subaward
Cayuse 424 allows you to include subaward information on your prime proposal in three ways:

- By linking to an existing subaward
- By importing a subaward
- By creating a worksheet row

Once subaward information is linked, imported or created, it will automatically flow into the prime proposal.

You can also export subaward information for another Cayuse 424 customer to use.
1. Navigate to the Proposals tab and click Create.

2. Select **Subaward Proposal**, and click **Create**.

3. In the Create New Subaward dialog, enter a **Subaward Name**.

![Create New Subaward](image)
4. Select an **Organization**.
   - If your subaward organization is not available, you can skip this for now.
5. Select the **# of Budget Periods**.
6. Select a **Validation Type** (e.g., NIH).
7. Click **Create Subaward**.
A subaward includes:

- A Performance Sites form
- A Key Persons form
- A detailed budget form

Usually these are R&R forms, but Cayuse 424 also supports the Fed/Non-fed budget form.

See **Module 6: Proposal Basics** and **Module 7: Proposal Budgets** to learn more about filling out these forms.
1. Open the prime proposal you want to link the subaward to.

2. Navigate to the **Subaward Budget Attachment** form.

3. Click ![Link Subaward](#)

4. In the dialog, select the subaward you want to link using the list or search.

5. Align the budget periods.

6. Click **Link in Subaward**.
When the link of personnel and budget information is complete, click **Finish**. You’ll see the subaward in the **Subawards** tab.

The subaward budget figures show in the prime and in the Subaward Budget Attachment form.

To view or edit the subaward, click its name in the Subawards tab or in the form.
Creating a Worksheet Row

- A worksheet row allows you to manually enter only budget information for a subaward.
- This is particularly useful if submitting a modular budget since you cannot submit subawards with a modular budget.

1. Open the prime proposal.
2. Navigate to the **Subaward Budget Attachment** form.
3. Click [Worksheet Row]
4. Enter the **Worksheet Row Title**.

5. Click **Add Worksheet Row**.
6. Expand the row using the plus sign to enter **Direct Costs** and **Indirect Costs** for all budget periods.

7. Cayuse 424 auto-calculates **Allocated to IDC Base**.

8. These costs will be auto-populated to the Detailed and Modular Budgets.

<table>
<thead>
<tr>
<th>Period</th>
<th>Inactive</th>
<th>Subaward Direct Costs</th>
<th>Subaward Indirect Costs</th>
<th>Subaward Costs</th>
<th>Allocated to IDC base</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td>10,386</td>
<td>5,268</td>
<td>15,654</td>
<td>15,654</td>
</tr>
<tr>
<td>2</td>
<td></td>
<td>11,556</td>
<td>5,892</td>
<td>17,448</td>
<td>9,346</td>
</tr>
<tr>
<td>3</td>
<td></td>
<td>12,786</td>
<td>6,214</td>
<td>19,000</td>
<td>0</td>
</tr>
<tr>
<td>4</td>
<td></td>
<td>11,500</td>
<td>5,800</td>
<td>17,300</td>
<td>0</td>
</tr>
<tr>
<td>5</td>
<td></td>
<td>9,673</td>
<td>4,966</td>
<td>14,639</td>
<td>0</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>55,901</td>
<td>28,140</td>
<td>84,041</td>
<td>25,000</td>
</tr>
</tbody>
</table>

![Cayuse 424 logo]
As with other forms, you include subawards by clicking the check box adjacent to the Subaward Budget Attachment form in the left sidebar.
In order to import a subaward, your subcontractor must create the subaward using **Cayuse 424, Subawards.com, or Adobe forms** and send the exportable file to you.

You can import the subaward proposal either directly into the prime proposal or into the Proposals List.
Importing to the Proposals List

1. Go to the **Proposals** tab and click **Import Subaward**.
2. Enter a name for the subaward.
3. Browse for the subaward file on your computer.
4. Click **Import Subaward**.
5. The imported subaward will appear in the Proposals List.
Importing a subaward into a prime proposal combines importing to the Proposals List with linking a subaward to a prime proposal.

1. Open the prime proposal.
2. Go to the **Subaward Budget Attachment** form.
3. Click ![Import Subaward]
4. Enter a name for the subaward, and browse for the file on your computer.
5. Align the budget periods as needed.
6. Click **Import Subaward**.
Exporting a Subaward Proposal

If you are working on a subaward to send to another institution, you can create and export a standalone (unlinked) subaward to another Cayuse 424 customer institution.

1. After creating your Subaward Proposal, click  at the upper right corner of the window to export the data.

2. Enter a name for the exported file.

3. Click  Export Subaward

4. Save the exported subaward file to a location on your computer or network.

5. Send the file to your collaborating institution.
Export Tips

- Internal documentation (e.g. signed Face Pages, Letters of Support, Letters of Collaboration, etc.) can be added to the Documents page under Proposal Summary. These will be exported with the subaward.

- We recommend validating the subaward before exporting it to prevent incorrect data from being exported.
NIH Requirements for Subawards

- For Opportunities that require a full budget, you must attach the completed subaward proposal.
  - NIH cannot compare your grant costs correctly to the direct cost limitation without the complete subaward budget.
  - NIH cannot calculate the indirect costs on subawards without the attachment.
- If this information isn’t provided, your proposal may be rejected or delayed after submission.
- If the proposal has a Modular Budget, you can use the Worksheet Rows function to determine the costs correctly.
In this module you learned how to:

- Create a subaward
- Link a subaward to a prime proposal
- Import a subaward
- Export a subaward
Objectives

In this module you will learn how to:

- Attach documents to your grant proposal
- Follow Grants.gov and NIH attachment guidelines
- Attach your Research Plan using the “Exploder”
- Attach Letters of Support
- View proposal forms and attachments in PDF format
### Commonly Required Attachments

- **PHS 398 attachments for NIH and other PHS agencies only**

<table>
<thead>
<tr>
<th>Form Set</th>
<th>Attachment</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>SF424 RR, page 2</strong></td>
<td>• Pre-application</td>
</tr>
<tr>
<td></td>
<td>• List of Project Congressional Districts</td>
</tr>
<tr>
<td></td>
<td>• Cover Letter</td>
</tr>
<tr>
<td><strong>SF424 RR, Other Project Information</strong></td>
<td>• Project Summary/Abstract</td>
</tr>
<tr>
<td></td>
<td>• Project Narrative</td>
</tr>
<tr>
<td></td>
<td>• Bibliography and References Cited</td>
</tr>
<tr>
<td></td>
<td>• Facilities and Other Resources</td>
</tr>
<tr>
<td></td>
<td>• Equipment</td>
</tr>
<tr>
<td></td>
<td>• Other</td>
</tr>
<tr>
<td><strong>SF424 RR, Key Persons</strong></td>
<td>• Biographical Sketch</td>
</tr>
<tr>
<td></td>
<td>• Current and Pending Support</td>
</tr>
<tr>
<td><strong>SF424 RR Budget, page 3</strong></td>
<td>• Budget Justification</td>
</tr>
<tr>
<td><strong>Modular Budget</strong></td>
<td>• Budget Justification</td>
</tr>
<tr>
<td><strong>PHS 398 Research Plan</strong></td>
<td>• Research Plan</td>
</tr>
</tbody>
</table>
1. Locate the appropriate page of the form you need to attach the document to.

2. Locate the attachment point by the label. Current & Pending Support is shown below.

3. Click **Add Attachment**.
4. In the **Upload Attachment** popup, click **Browse** next to the **PDF file** slot.

5. Select the PDF file in the file browser and click **Open**.
   - PDF is required and will be submitted to Grants.gov.
   - Cayuse 424 cannot submit non-PDF files.

6. If desired, do the same for the Source file (e.g. Word format).
   - Source file is not required, but makes it easy to change the file if modifications are needed.
7. Once you’ve added the desired file(s), click **Upload**.

8. The files have been uploaded when **PDF** (and **SRC** if you included a source file) are blue links.
Grants.gov and NIH both maintain guidelines on successfully submitting PDF attachments.

- Convert ‘active’ form field PDFs to ‘flat’ (static) PDFs using a PDF converter.
- Names should be less than 50 characters.
- Create PDFs using creation software, not by scanning a printed document.
- Disable any security features in the document.
- Do not include stamps or annotations.
- Make sure your page size is 8.5” x 11” letter (do not use A4).

These guidelines apply to most opportunities, but always verify your FOA instructions if you have any questions.
The Research Plan can be attached manually using the previous steps, but Cayuse 424 also allows you to upload just one document and get all your attachments in the right place!

1. Create a properly formatted Research Plan.
   - See the SF 424 R&R Application Guide for NIH for details.

2. Insert a page break at each section header (e.g. Introduction, Specific Aims).

3. Create a PDF of your Research Plan file using the PDF creation software of your choice.
4. Navigate to the PHS 398 Research Plan form of your proposal.

5. Upload your Research Plan PDF file to the **Composite PDF** slot.
5. You should see that the division of the file has been successful.

6. Your attachment points will have PDF attachments associated with them.
Cayuse 424 offers an Append function to put several letters of support together without bundling.

- Use the **Add** button to add the first letter.
- For subsequent letters, use the **Append** button.
  - A source file cannot be added for additional letters.
- Selecting **Delete** will delete all items.
Viewing Proposals in PDF Format

You can generate a PDF to see how your proposal looks at any time.

1. Click the printer icon at the top right.

2. Check any form you want to print. You can select as many or as few forms as you need.

3. If you want to see the attachments to the form as well, check **Include any attachments**.

4. Click **Generate PDF**. Save or print the generated file.
Conclusion

In this module you learned how to:

- Attach documents to your grant proposal
- Follow Grants.gov and NIH attachment guidelines
- Attach your Research Plan using the “Exploder”
- Attach Letters of Support
- View proposal forms and attachments in PDF format