Linking a Cayuse 424 Proposal to a PDRF:

One can link a Cayuse 424 proposal to a SeRA PDRF to populate the PDRF with information from the Cayuse 424 proposal to reduce duplicative data entry. A Cayuse 424 proposal can be linked to a PDRF at all stages of a PDRF transaction before completion and for all PDRF types.

Information* that can be pulled from a Cayuse 424 proposal and pushed to a SeRA PDRF includes:

- Sponsor
- Key Personnel
- Subaward institutions and key personnel
- Proposal Start and End Dates
- Proposal Title
- CFDA #
- Opportunity #
- Total Request Budget Amount
- Human Subjects (Y/N)
- Animal Subjects (Y/N)
- Human Stem Cells (Y/N)
- Will any resources (funding, people, equipment, etc.) be used outside of the United States for this project? (Y/N)

*The extent of information pulled from a Cayuse 424 proposal and populated in SeRA is dependent on the specific application form pages being used by the relative opportunity # and the extent the application form pages have been completed at the time of linking. Cayuse 424 proposals that do NOT include the SF 424 RR, RR Other Project Information, RR Key Persons, and/or RR Subaward Budget Attachment form pages will not populate in SeRA some project question information, key personnel information, and/or the presence of subawards (as applicable).

Linking a Cayuse 424 Proposal at PDRF Initiation:

1. From the Start Transaction screen of a PDRF select Yes to the question ‘Do you want to link to a Cayuse application?’ A Cayuse Proposal ID field will then display.

2. From within the Cayuse proposal, click the icon at the top of the page. A Proposal Information window will open which contains a 10 digit Proposal ID. Copy the Proposal ID number, and enter it in the ‘Cayuse Proposal ID’ field in the Start Transaction window in SeRA. Click Start.
3. The Cayuse linking wizard will run, and a series of windows will display to verify the information being pulled from Cayuse 424 and being pushed to the PDRF. Once the wizard begins you cannot navigate backwards in the wizard. However, you can click the X in the top right of the wizard window at any time to cancel the wizard from running.

   A. **Verify Sponsor** – Review that the sponsor listed in the ‘Push to PDRF’ column is the correct SeRA Sponsor. If yes, click **Next**. If you are starting a Supplement PDRF, or Resubmission PDRF, it will also show what is currently on the PDRF in the ‘PDRF Sponsor’ column.

   Please note, a message will display that the sponsor cannot be updated if the PDRF is in a stage where the sponsor field is not editable.

   B. **Verify Personnel** - Personnel listed on the Cayuse proposal’s RR Key Persons form page that have an associated SU Net ID will show in the Verify Personnel window. Some roles will default to the associated SeRA PDRF role. For all others, select the role from the drop-down so they can be properly set in SeRA. Verify the department for each individual is correct and change as needed. De-select the ‘Push to PDRF’ column prior to continuing for any personnel that should not be listed on the PDRF. Click **Next**.

   Please note, if your Cayuse 424 proposal does NOT include the RR Key Persons form page personnel information entered in the Cayuse 424 proposal will not be pulled from Cayuse and pushed into the PDRF. For these Cayuse 424 proposals you will need to enter the appropriate project personnel in the PDRF as you would for non-Cayuse 424 proposals.
C. **Verify Subawards** – Any subawards listed on the Cayuse 424 proposal’s RR Subaward Budget Attachment form pages will show in the Verify Subawards window. For each subaward institution identified in Cayuse search and select the appropriate subaward institution to be pushed to SeRA. Click **Next**.

*Please, note if your Cayuse 424 proposal does NOT include the RR Subaward Budget Attachment pages and/or if these pages are not being utilized in your Cayuse 424 proposal [such as in the case of NIH modular budget proposals] subaward information entered in the Cayuse 424 proposal will not be pulled from Cayuse and pushed into the PDRF. For these Cayuse 424 proposals you will need to enter the appropriate subaward information in the PDRF as you would for non-Cayuse 424 proposals.*

D. **Verify Project Info** - Additional project information will pull from the Cayuse application and show here. Please, note if you are starting a Supplement PDRF or Resubmission PDRF, the window will also show what is currently on the PDRF in the ‘PDRF Data’ column. Click **Finish**.

*Please note, for Cayuse 424 proposals that do not include the SF 424 RR and/or RR Other Project Information form pages minimal project information will flow from Cayuse to SeRA. For these proposals you will need to enter most project information in the PDRF as you would for non-Cayuse 424 proposals.*
4. Once the linking wizard is finished you can see, delete, and refresh the Cayuse link on the SeRA PDRF on the **Admin & Sponsor Details** page. The blue Cayuse 424 Proposal ID # is a direct link to the relative proposal within Cayuse. The presence of the link can also be viewed within Cayuse on both the Proposals List Screen as well as within the relative proposal.

*Please note, the direct link will only work for those that already have been granted permission to the relative Cayuse 424 proposal and/or have central office Cayuse access.*
**Refreshing an Existing PDRF Link to a Cayuse 424 Proposal:**

1. **At any point during the PDRF transaction before it is completed the PDRF assignee can on the SeRA PDRF on the Admin & Sponsor Details page click the trash can icon to delete a Cayuse link or click Refresh to refresh the link between the PDRF and the Cayuse application. Clicking Refresh will trigger the linking wizard to run again and will update or notify you to update data elements that have changed since the last time the wizard ran.**

   ![Submission Method Cayuse 424 Refresh](image)

   **A. Verify Sponsor** - In this example there is no change in the sponsor. Click **Next.**

   ![Verify Sponsor](image)

   **B. Verify Personnel** - In this example a new Key Person has been added to the Cayuse 424 proposal. Review, edit the role and department as needed, check or uncheck if this person should be pushed to the PDRF, and click **Next.**

   ![Verify Personnel](image)
C. **Verify Subawards** - In this example there has been no change to the subaward listed on the Cayuse 424 proposal and already on the PDRF. Thus, we will leave the ‘Push to PDRF’ box unchecked. Click **Next**. *Please note, if the ‘Push to PDRF’ box were checked in this example the result would be two duplicate UC Berkeley subaward entries on the Budget Questions page of the PDRF.*

D. **Verify Project Info** - In this example the PoP dates, title, total requested budget amount, and animal subjects information has been changed in the Cayuse 424 proposal. The linking wizard identifies where the Cayuse 424 proposal and PDRF are no longer matching and indicates for which fields the PDRF is being system updated and for which fields the PDRF assignee will need to manually update the PDRF or Cayuse. Click **Finish** and proceed with making any needed manual PDRF and/or Cayuse updates.
Linking a Cayuse 424 Proposal to an Existing PDRF:

1. From the Admin & Sponsor Details page of a PDRF select Cayuse 424 as the submission method and click Link Cayuse Application.

2. The Link Cayuse Application window will open. From within the Cayuse proposal, click the icon at the top of the page. A Proposal Information window will open which contains a 10 digit Proposal ID. Copy the Proposal ID number, and enter it in the ‘Cayuse Proposal ID’ field in the Link Cayuse Application window in SeRA and click Link.
3. The Cayuse linking wizard will run, and a series of windows will display to verify the information being pulled from Cayuse 424, compare it to what is already in the PDRF, and indicate for which fields the PDRF is being system updated and for which fields the PDRF assignee will need to manually update the PDRF or Cayuse. Please note, once the wizard begins you cannot navigate backwards in the wizard. However, you can click the X in the top right of the wizard window at any time to cancel the wizard from running.

   a. **Verify Sponsor** – Review that the sponsor listed in the ‘Push to PDRF’ column is the correct SeRA Sponsor. If yes, click **Next**. If no, edit as needed, and click **Next**.

      *Please note, a message will display that the sponsor cannot be updated if the PDRF is in a stage where the sponsor field is not editable.*

   b. **Verify Personnel** - Personnel listed on the Cayuse proposal’s RR Key Persons form page that have an associated SU Net ID will show in the Verify Personnel window and are compared against key personnel already listed on the PDRF. For personnel being pulled from Cayuse, some roles will default to the associated SeRA PDRF role. For all others, select the role from the drop-down so they can be properly set in SeRA. Verify the department for each individual is correct and change as needed. De-select the ‘Push to PDRF’ column prior to continuing for those personnel that should not be listed on the PDRF. Click **Next**.

      *Please note, if your Cayuse 424 proposal does not include the RR Key Persons form page personnel information entered in the Cayuse 424 proposal will not be pulled from Cayuse and pushed into the PDRF. For these Cayuse 424 proposals you will need to enter the appropriate project personnel in the PDRF as you would for non-Cayuse 424 proposals.*
C. **Verify Subawards** – The linking wizard will compare subawards already entered on the PDRF with any subawards listed on the Cayuse 424 proposal’s RR Subaward Budget Attachment form pages. For each subaward institution identified in Cayuse that is NOT already on the PDRF search and select the appropriate subaward institution to be pushed to SeRA. In the below example, the subaward already entered on the PDRF is the same one as the one on the Cayuse 424 proposal. Thus, we will leave the ‘Push to PDRF’ box unchecked. If the ‘Push to PDRF’ box were checked in this example the result would be two duplicate UC Berkeley subaward entries on the Budget Questions page of the PDRF. Click Next.

*Please, note if your Cayuse 424 proposal does not include the RR Subaward Budget Attachment pages and/or if these pages are not being utilized in your Cayuse 424 proposal [such as in the case of NIH modular budget proposals] subaward information entered in the Cayuse 424 proposal will not be pulled from Cayuse and pushed into the PDRF. For these Cayuse 424 proposals you will need to enter the appropriate subaward information in the PDRF as you would for non-Cayuse 424 proposals.*

![Verify Subawards](image)

D. **Verify Project Info** - The linking wizard will compare project information already entered on the PDRF with that which is listed on the Cayuse 424 proposal’s SF 424 RR and/or RR Other Project Information form pages, and indicates for which fields the PDRF is being system updated and for which fields the PDRF assignee will need to manually update the PDRF or Cayuse. In the below example the PoP dates, title, and total requested budget amount in the Cayuse 424 proposal differs from what is in the PDRF. Click Finish and proceed with making any needed manual PDRF and/or Cayuse updates.

*Please note, for Cayuse 424 proposals that do not include the SF 424 RR and/or RR Other Project Information form pages minimal project information will flow from Cayuse to SeRA. For these proposals you will need to enter most project information in the PDRF as you would for non-Cayuse 424 proposals. Additionally, for supplement proposals the linking wizard will never overwrite the PDRF title with the Cayuse title, as the existing title in SeRA takes precedent supplement submissions.*
Below is additional project information identified in Cayuse. Proposal data in red will not be overwritten with Cayuse data.

<table>
<thead>
<tr>
<th></th>
<th>Cayuse Data</th>
<th>PDRF Data</th>
<th>Remarks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Proposal Start Date</td>
<td>06/01/2019</td>
<td>04/01/2019</td>
<td>04/01/2019 Manual update required</td>
</tr>
<tr>
<td>Proposal End Date</td>
<td>05/31/2024</td>
<td>03/31/2024</td>
<td>03/31/2024 Manual update required</td>
</tr>
<tr>
<td>Proposal Title</td>
<td>Fish Problems: No fingers!</td>
<td>Penguin Problems: When all of your friends webble</td>
<td>Fish Problems: No finger! Penguin Problems: When all of your friends webble</td>
</tr>
<tr>
<td>CFDA</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Opportunity #</td>
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<td>PA-C-R01</td>
<td>PA-C-R01</td>
</tr>
<tr>
<td>Total Requested Budget/Contract Value</td>
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<td>$3,823,350.00</td>
<td>$3,823,350.00 Manual update required</td>
</tr>
<tr>
<td>Human Subjects</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Animal Subjects</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Human Stem Cells</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Will any resources (funding, people, equipment, etc.) be used outside of the United States for this project?</td>
<td>No</td>
<td>No</td>
<td>No</td>
</tr>
</tbody>
</table>
Additional Cayuse 424 Linking Information:

Grants.gov Tracking # - Once a Cayuse application has been submitted to grants.gov the tracking number assigned will show in the PDRF Transaction Home. The Grants.gov tracking number functions as a hyperlink back to the application in Cayuse.

SeRA Dashboard Changes - An additional column is available to be added on your SeRA Dashboard so that PDRFs with a linked Cayuse proposal can be seen easily your SeRA landing page.

1. From your SeRA landing page under My Action Items click Actions
2. Click Select Columns form the Actions drop down menu
3. Move the selection “Cayuse Link” from the Do Not Display to the Display in Report list.
4. Click Apply. A 📈 will now display under on your SeRA landing page My Actions when a PDRF with a Cayuse proposal is linked is assigned to you for action. Clicking the icon will direct users to the proposal in Cayuse.