Stanford University - Cayuse 424 Quick Guide

About This Guide
This Quick Guide provides an overview of access and general features of the Cayuse 424 system for Stanford University Users. This guide does not provide step-by-step detailed instructions but references the Cayuse vendor authored Cayuse 424 – Comprehensive User Guide. Any questions or feedback from users regarding this guide, or information not included that would be useful to new users, can be sent to reymar@stanford.edu.

Requesting Access to Cayuse 424
Accounts have been created for nearly 4000 Stanford faculty and administrators based on their SUNet IDs. In the event you or your faculty attempt to log in and are denied access, please either submit a SeRA Help Ticket or email Megan Dietrich reymar@stanford.edu

Getting Started
1. Log in to https://sera.stanford.edu using your SUNet ID and password
2. Click on Navigate
3. Click Cayuse 424

4. Users will be redirected to the Cayuse 424 landing page. First time users, especially faculty, should update their Professional Profile
Find Your Funding Opportunity & Create Your Proposal

In order to start a proposal in Cayuse 424 users will need to either (a) create a proposal from a downloaded funding opportunity, or (b) locate and download the specific funding opportunity from the Cayuse server and create the proposal.

1. From the Cayuse 424 landing page, select Opportunities

2. Use the Search function to locate a downloaded Opportunity, or click Download Opportunities to download an Opportunity not yet in Cayuse 424

3. Click the green plus symbol next to the Opportunity Number to create a proposal using that opportunity
Assign Proposal Permissions

The proposal creator has full access rights to the proposal. Proposal permissions must be granted to other users who will need access to the proposal, such as the Principal Investigator and supporting administrators. Institutional Signing Officials (e.g. Contract & Grant Officers in OSR and Research Process Managers in RMG) have access to all Stanford proposals in Cayuse 424 and do not need to be assigned permission to a specific proposal.

1. From within the proposal, grant proposal access using the Permissions Key located in the upper right corner.

2. Add additional users for the proposal by clicking on the Add user button. Permissions can be customized per user as appropriate.

- Please note: by default the Proposals List shows the last 25 proposals you've opened for fast access. This is your Recently Viewed list. Clicking Show All lists all the proposals that you are able to view. Thus, if you create a proposal and grant someone else access that person will need to click Show All from their Proposals List to see it listed, as it will not by default initially appear in their Recently Viewed list. Checking Make Show All the default view means Cayuse 424 will show all of your proposals whenever you log in.
Develop The Proposal

Preparing a Grants.gov proposal in Cayuse 424 offers many benefits, including auto-filling stored data from professional and institutional profiles, features in the budget pages that will help verify calculations made on spreadsheets, and real-time validation of proposal content.

1. Use the left hand navigation to access various parts of the proposal.

2. Data that can be auto-filled are identified by the pencil icon. Click on the icon to locate and make the appropriate selection.

3. If a desired selection does not appear in the Recently Auto filled Applicant Contacts, click Show All. For maximum results, set the eRA Role Filter to “Any/all (unfiltered)”
Route The Proposal to OSR/RMG for Review & Submission

When the proposal in Cayuse 424 is complete and ready for submission, notify the Office of Sponsored Research (OSR) by submitting a Proposal Development & Routing Form (PDARF) via the SeRA System. For School of Medicine proposals, coordinate with your Research Process Manager.

1. Identify the Submission Method as “Cayuse 424” on the PDRF.

2. OSR Contract & Grant Officers and Associates and School of Medicine RPMs will be able to access, review and submit your Grants.gov submission directly from the Cayuse 424 system.

Where to Find Help

https://doresearch.stanford.edu/SeRAGuides

Email Megan Dietrich at reymar@stanford.edu