

## Cayuse 424 Quick Start

### Cayuse 424 Quick Start; 10 Quick Steps to Building a Proposal in Cayuse 424

Cayuse 424 enables users to download Opportunities into an editable format, copy Proposals, save partial proposal work in a central location, auto-populate data, calculations, pre-submittal validations, and share Proposals.

Cayuse 424 streamlines the development, collaboration, and electronic submission of Grants.gov Proposals. You can easily locate funding opportunities and complete Proposal forms. This document describes how to create a Proposal using Cayuse 424.

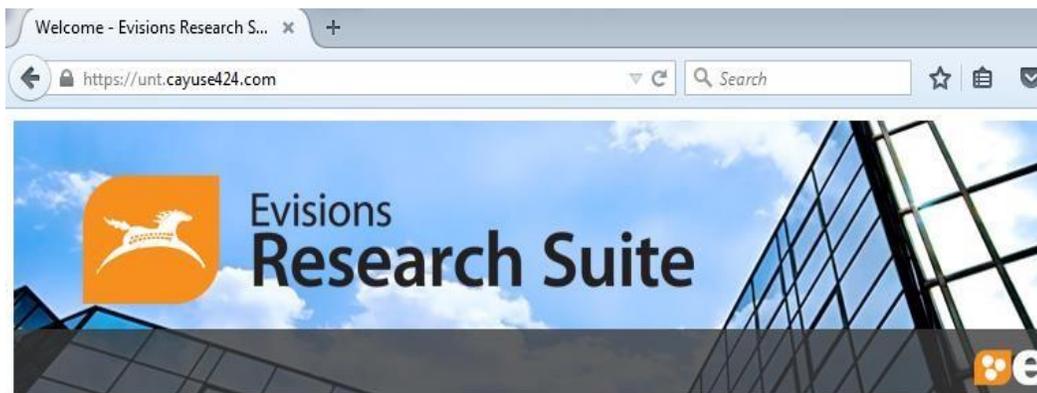
Visit [OGCA's Cayuse page](#) for more details.

## Step 1; Log into Cayuse 424

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- a. Complete [GCS Request](#)
- b. Open Firefox Browser
- c. Enter your Cayuse 424 URL: <https://unt.cayuse424.com>
- d. Enter your EUID and Password. Click SIGN IN.

The Password is your password associated with your UNT EUID. EUID user password resets are handled by completing request at <https://ams.unt.edu/> or contacting UNT System Service Desk at 940-565-4357 or send email to [ithelp@untsystem.edu](mailto:ithelp@untsystem.edu).



Logged in

## Evisions Research Suite

3.1

### Research Administration Modules

- Cayuse SP (Sponsored Projects)
- Cayuse 424

### System Administration Applications

- Backbone
- Research Contacts
- Workflow

### Application Help

- Research Suite Support Center
- Browser Support & Configuration

## [Step 2](#)

Visit [OGCA's Cayuse page](#) for more details.

## Step 2; Set up or update your Professional Profile

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Professional Profiles have been set up under the People tab for all current PIs. It is your responsibility to keep your profile updated. Only you have access to change your profile information, unless you grant permission to others. You may upload and store multiple biosketches in your Professional Profile. Any PI without a Professional Profile must create one prior to starting a grant application. Key persons and other significant contributors must have a Professional Profile as well.

Please update your Profile so that it is current (contact, address, etc.). Navigation: Log in, Cayuse 424 module, People tab, type your last name and search, click on your name, and follow left menu of areas to update your Professional Profile.

The screenshot shows the Cayuse 424 interface. At the top, there are navigation tabs: Overview, Opportunities, Proposals, **People**, Institutions, Reports, and Admin. The user is logged in as Michelle Myers. The main area is titled 'People' and contains a search bar with a yellow highlight, a dropdown menu for 'All Institutions', and a list of search results. The results include names like '#OGCA [Routing], Office of Grants &...', 'Abel, Mickey S', 'Acevedo, Miguel F', 'Acree, William Eugene', 'Adams, Shawn', 'Adelman, Amie J', 'Agapito, Luis Alberto', 'Ahmed, Iftekhar', 'Ahmed, Waquar', 'Akl, Robert', 'Ala'i-Rosales, Shahla S', 'Albarran, Alan B', and 'Allaart, Pieter'. The profile for 'Myers, Michelle' is selected, and her 'Professional Profile' page is displayed. The profile page has a yellow highlight around the 'General Personal Information' section, which includes fields for Name, Degrees, Demographics, and Biosketches. Below this is the 'Institutional Association' section, which shows 'University of North Texas (OGCA - Grant & Contract Admin)'. To the right of the profile is a 'Name' form with fields for Prefix, First (Michelle), Middle, Last (Myers), and Suffix, along with buttons for 'Rename', 'NIH Commons ID', and 'NASA NSPIRES ID'.

### Step 3

Visit [OGCA's Cayuse page](#) for more details.

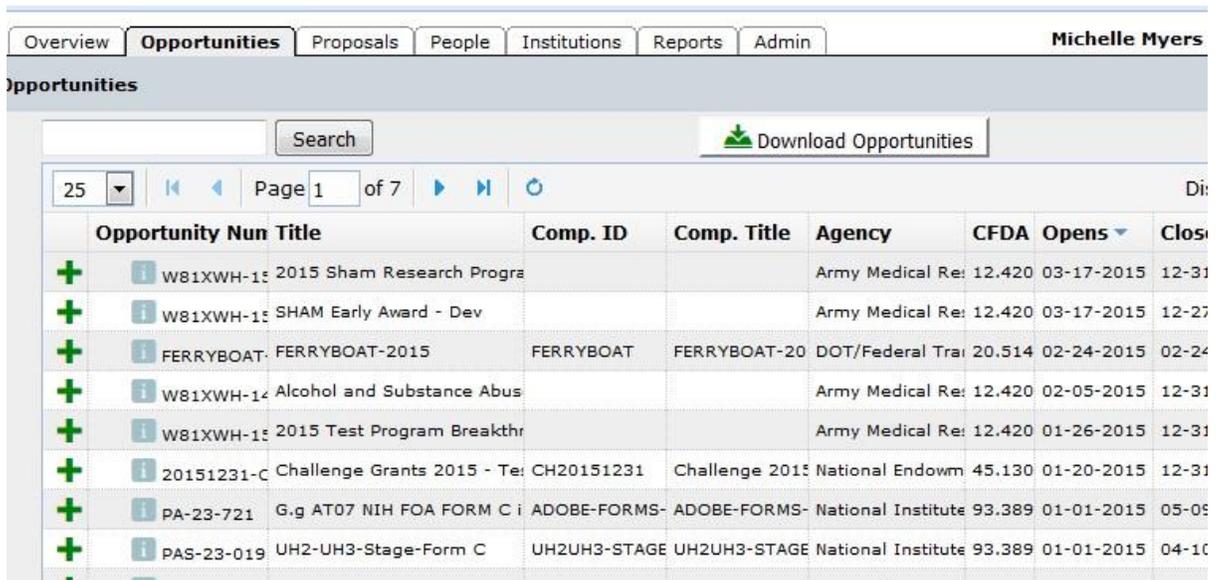
## Step 3; Find an Opportunity

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The Opportunities tab displays a list of federal funding Opportunities that have been downloaded into Cayuse 424 from Grants.gov. To retrieve an Opportunity from Grants.gov, you must know the Opportunity Number or CFDA Number. Once you have one of these numbers:

- On the Opportunities tab, click Download Opportunities box.
- Enter the Opportunity Number or CFDA Number.
- Click Download Opportunities.

Click the Opportunity Details icon to the left of the Opportunity Number for more information about the Opportunity. Click the Create Proposal icon to create a proposal using that Opportunity.



|   | Opportunity Num | Title                      | Comp. ID     | Comp. Title    | Agency             | CFDA   | Opens      | Close |
|---|-----------------|----------------------------|--------------|----------------|--------------------|--------|------------|-------|
| + | W81XWH-15       | 2015 Sham Research Progra  |              |                | Army Medical Re    | 12.420 | 03-17-2015 | 12-31 |
| + | W81XWH-15       | SHAM Early Award - Dev     |              |                | Army Medical Re    | 12.420 | 03-17-2015 | 12-27 |
| + | FERRYBOAT-      | FERRYBOAT-2015             | FERRYBOAT    | FERRYBOAT-20   | DOT/Federal Tra    | 20.514 | 02-24-2015 | 02-24 |
| + | W81XWH-14       | Alcohol and Substance Abus |              |                | Army Medical Re    | 12.420 | 02-05-2015 | 12-31 |
| + | W81XWH-15       | 2015 Test Program Breakthr |              |                | Army Medical Re    | 12.420 | 01-26-2015 | 12-31 |
| + | 20151231-C      | Challenge Grants 2015 - Te | CH20151231   | Challenge 2015 | National Endowm    | 45.130 | 01-20-2015 | 12-31 |
| + | PA-23-721       | G.g AT07 NIH FOA FORM C i  | ADOBE-FORMS- | ADOBE-FORMS-   | National Institute | 93.389 | 01-01-2015 | 05-05 |
| + | PAS-23-019      | UH2-UH3-Stage-Form C       | UH2UH3-STAGE | UH2UH3-STAGE   | National Institute | 93.389 | 01-01-2015 | 04-10 |

### Step 4

Visit [OGCA's Cayuse page](#) for more details.

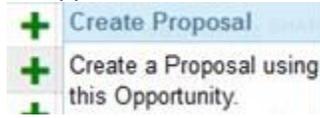
## Step 4; Create your proposal

### Step 4; Create your proposal

Users should always start Proposals in [Cayuse SP](#).

Additionally, there are two ways to create a proposal directly in Cayuse 424:

(a) On the Opportunities tab, click the Create Proposal icon to the left of an Opportunity; or



(b) On the Proposals tab, click Create Proposal at the top of the screen.



Per OGCA policy, name the Proposal as follows: [PI Last Name]-[PI First Name]; For Example: D'Souza, Frank

### Create Proposal

**Grants.gov/Research.gov**  
Proposals for federal opportunities downloaded from and submittable to Grants.gov/Research.gov.

**Other Proposal**  
Other proposal formats not electronically submitted to Grants.gov/Research.gov, including other federal proposals, or opportunities from non-federal sponsors. Also includes internal opportunities.

**Research Subaward Proposal**  
Subaward proposal for internal use or for sending to other Cayuse424 sites; uses the 424 RR Budget.

**Training Subaward Proposal**  
Subaward proposal for internal use or for sending to other Cayuse424 sites; uses the PHS 398 Training Budget.

### Create Grants.gov/Research.gov Proposal

Opportunity: **FERRYBOAT-2015** ⓘ

Proposal Name:  ⓘ

Showing recent PIs | [Show all](#)

Principal Investigator: Dixon, Richard Arthur (DEPT OF BIOLOGY) / University of North Texas  
Taylor, Daniel (PSYCHOLOGY) / University of North Texas  
Zhang, Tao (KINESIOLOGY, HEALTH PR) / University of North Texas

Organization:

Due Date:  ⓘ

Validation Type:

## [Step 5](#)

Visit [OGCA's Cayuse page](#) for more details.

## Step 5; Grant proposal permissions to the appropriate people

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The proposal creator is automatically granted full permissions to the proposal. The proposal creator is the only user that can initially grant proposal permissions to other users. As the proposal creator, you must grant the appropriate permissions to other users who require access to the proposal, including other principal investigators and department administrators.

The screenshot displays the 'Proposal Permissions' interface. On the left is a sidebar with a tree view of proposal components, including 'SF424 RR', 'RR Performance Sites', 'RR Key Persons', 'RR Budget', 'RR Subaward Budget Attachment', and 'Attachments'. The 'Proposal Management' section is expanded to show 'Permissions', 'Electronic Submission', 'Proposal History', and 'Export'. The main area is titled 'Proposal Permissions' and features an 'Add user' button. Below this is a table of permissions for the user 'Myers, Michelle' (mlm0521@unt.edu).

|                                   | List                                | Read                                | Write                               | Attach                              | Break Lock                          | Delete                              | Print                               | Change Permissions                  | Add User                            | Remove User                         | Submit                   |
|-----------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|--------------------------|
| Myers, Michelle (mlm0521@unt.edu) | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

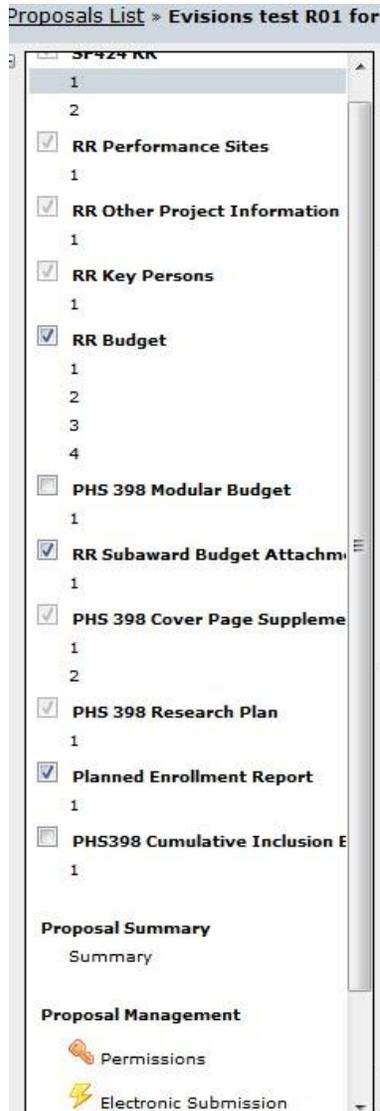
### [Step 6](#)

Visit [OGCA's Cayuse page](#) for more details.

## Step 6; Complete the forms and attach necessary documents

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All forms in the Opportunity are located in the navigation bar on the left side of the screen. Mandatory forms are automatically checked and cannot be unchecked. Optional forms may be checked if you wish to submit those forms to the sponsor.



### [Step 7](#)

Visit [OGCA's Cayuse page](#) for more details.

## Step 7; Build the budget

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Check your proposal solicitation for specific budgetary requirements (i.e., whether to build a detailed budget, modular budget, or subaward budget). You may specify up to ten (10) budget periods. Cayuse 424 performs budget calculations after you enter salary, personnel effort, fringe benefits, and other required amounts. Cayuse 424 can also perform cost replication and escalation for all budget categories.

## Step 8; Check for errors and warnings in the Proposal

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Cayuse 424 keeps a running list of errors and warnings. Errors reflect problems that will impose a hardstop rejection at Grants.gov or the funding agency. Errors must be corrected prior to submitting the proposal. Warnings are not critical, but they may cause a proposal to be rejected from the funding agency. Items labeled "Info" are tips and recommendations from Cayuse; they will not prevent the proposal from being submitted.

Click the Error / Warning / Info button at the bottom of the Proposal to display the validations panel. Click the hyperlink in the validation message to be taken to the field in question. Cayuse 424 will highlight the field that contains the error or warning. The number of Error / Warning / Info messages decreases as you correct the issues.

## Step 9; Validate Proposal

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**Run final validation check** and Validate Proposal in Cayuse 424. Then complete Cayuse SP process and Submit for Routing in Cayuse SP. This will LOCK your Proposal in Cayuse 424 and KICKOFF routing in Cayuse SP for approvals. These actions update the status of your Proposal.

Prior to clicking Run Validation Check in Cayuse 424, complete items 1-3 in any order:

#### **Cayuse 424 process check**

1. completed the required forms
2. uploaded documents
3. fixed all errors or warnings
4. Validate Proposal

After clicking Validate Proposal in Cayuse 424, navigate to [Cayuse SP](#) to review and complete the SP process, complete items 1-3 in any order:

#### **Cayuse SP process check**

1. completed the required sections
2. uploaded documents
3. received green checks in all sections of Proposal
4. Verified Approving Depts/Routing chain
5. Added any optional submission notes
6. Submit for Routing (approval routing).

By clicking Submit for Routing in SP, the system generates an email requesting each PI to Certify the Proposal. The email will include a link for each to connect to their [PI Certification Inbox](#).

Upon routed approvals from the Routing Chain, OGCA will then review proposal for submission. You will receive emails for status updates, but at any time Routing and Proposal Status are available under your [My Proposals](#), [Submitted Proposals](#) section.

## [Step 10](#)

Visit [OGCA's Cayuse page](#) for more details.

## Step 10; Track your proposal

### Step 10; Track your proposal after it's submitted to Grants.gov.

When the proposal is submitted, a Grants.gov tracking number is recorded in the Proposal Submission History. [Click the Submission icon to view the Grants.gov tracking number, date and time of receipt, and submitter.](#)

The Office of Grants & Contracts Administration receives a series of emails from Grants.gov indicating receipt and acceptance or rejection of the application. The PI receives an email regarding the status of the proposal. Sometimes this email requests the PI to review and approve the proposal on the funding agency website.

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