

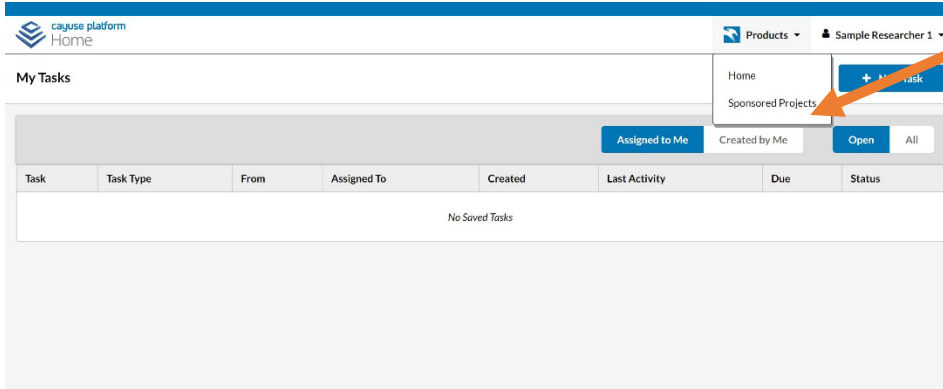
Guide for Users – Creating, Completing, Certifying a Proposal Record

The following is intended to provide guidance on creating and completing the Proposal Form in Cayuse. As Cayuse is a new for CSUSM, we welcome any feedback you have in accessing and navigating the Proposal Form and Cayuse in general.

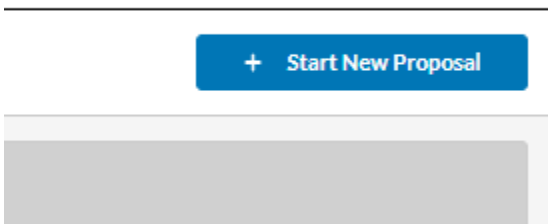


CREATING A PROPOSAL RECORD

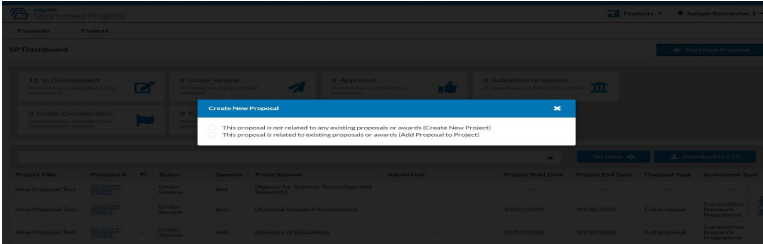
1. Go to <https://csusm.app.cayuse.com/>
2. Log in with CSUSM credentials (single sign on)
3. From upper right Products select “Sponsored Projects”



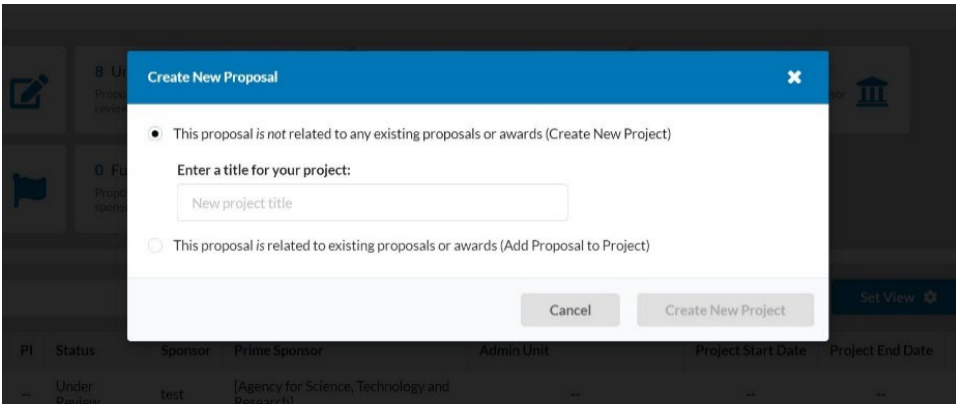
4. In the upper right, click “Start a New Proposal”



5. Select “This proposal is not related to any existing proposals or awards (Create New Project).”



6. Enter your expected title for the proposal (title can change for submission but this will be what it is titled in Cayuse)



7. Click “Create New Project”

GUIDANCE FOR COMPLETING PROPOSAL FORM SECTIONS

GENERAL

1. We are asking PIs/PDs to complete some sections of the proposal form, and Grants and Contracts Development will complete the others.

PI/PD completes the following Sections	Grants and Contracts Development completes the following sections
Investigators (if there are non-CSUSM investigators, then let GCD know)	General Information
Internal Considerations	Subrecipients
Proposal Abstract (upload PDF as attachment)	Summary Budget
Project Data	Attachments and Submission Notes: Once routing will attach: Proposal Budget Internal (Excel), Proposal Subrecipient Budget (where needed), Subrecipient Commitment Form; Indirect Cost (F&A)Rate Waiver/Exception Form Once proposal submitted will attach: Application Package, screen shot of COI resolved (Other); Biosketch/CV; Other Support; Proposal Budget Justification
Export Control	
Intellectual Property	
Financial Conflict of Interest (review)	
Assurances (review)	

2. Required fields are noted with an *

3. Be sure to click on the navigation on the left where the red numbers appear so that each turns to a green check mark

4. If you don't know the answer, don't worry. Please complete what you are able and your Grants and Contracts Specialist will let you know how to complete remaining fields.

Once you have started a proposal record, please STOP at this point and let the Grants and Contracts Specialist know that you have started a record. They will let you know when you can initiate routing.

INITIATE ROUTING

Complete Review

When all of the Sections have green checkmarks and you have reviewed the information under Assurances, the proposal is ready for routing. If there are remaining red exclamation points, you can click on the section to see if it clears, and if it does not there is missing information in that section.

Proposal Form	Routing	History	Access
Proposal Sections			
General Information	✓		
Investigators	✓		
Subrecipients	✓		
Internal Considerations	✓		
Proposal Abstract	✓		
Summary Budget	✓		
Project Data	✓		
Export Control	✓		
Intellectual Property	✓		
Financial Conflict Of Interest	✓		
Attachments And Submission Notes	✓		
Assurances	✓		

Route for Review

When you are ready to route the proposal, click "Route for Review" in the upper left.

My Actions

Complete Review

Route for Review

Proposal Summary

PI: Julie Maderazo

Admin Unit: --

Sponsor: National Institutes of Health

Prime Sponsor: --

Sponsor Deadline: 9/27/2021

Proposed Total Amount: --

Proposal Form

Routing

History

Access

Tasks

Notes

Attachments

Links

Assurances

Principal Investigator/Project Director and Co-Principal Investigator/Co-Investigator/Co-Background


When a proposal is submitted to an agency for support of research, training, or other sponsored activities, the official authorized to sign the proposal must ensure that University policies and procedures were followed in the preparation and submission of the proposal. In certifying the Proposal Form, the PI/PD and Co-PI/Co-I/Co-PDs certify that they are or will be in compliance with University and sponsor policies and procedures. Many of the following certifications are federal in origin, and the principles behind them may vary.

CERTIFY

After you initiate routing you will need to “Certify” as the Principal Investigator. Co-PIs also need to certify the proposal.


My Actions	Proposal Summary
<p>Complete Review</p> <p>Certify Proposal</p> <p>Route for Review</p>	<p>PI: Meliss</p> <p>Admin Unit: --</p>

Proposal Form	Routing	History	Access	Tasks	Notes	Attachments
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Proposal Sections	Financial Conflict of Interest
General Information 	At this time, investigators who are required to comple

MONITORING ROUTING

1. Under Review Your proposal will be “Under Review” until routing is complete and then it will read “Approved.”

Under Review 	
Project Start Date: 12/12/2021	Project: 21-0076
Project End Date: 10/20/2021	
Instrument Type: Grant	