

# Guide for Users Who Are Reviewers (Approvers) of Proposals

The following is intended to provide guidance on reviewing 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.



Your role as a reviewer of the Proposal Form is described in the Pre-Award Review and Approval Procedure.

# **REVIEWING A PROPOSAL RECORD**

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

						Home Sponsored Projects	+ » ·· ·ask
					Assigned to Me	Created by Me	Open All
ïask	Task Type	From	Assigned To	Created	Last Activity	Due	Status
				No Saved Tasks			

4. SP Dashboard shows the various stages of proposals. If there is a proposal ready for your review it will be "Under Review."

Proposals Projects Awards More -	
SP Dashboard + Start Ne	v Proposal
15 In Development       1. Under Review       0 Approved       0 Submitted to Sponsor       0 Under Consideration       0 Funded         Proposals are being filled out by researchers       Proposals are being internal reviewed of       0 Submitted to sponsor       1       0 Under Consideration       0 Funded	
O Closed Proposals were closed by an admin for some other reason	
Q X See assigned to me only  Assign selected  Set View  C  L Download	to CSV
□ Project Title Proposal # PI Status Sponsor Prime Sponsor Admin Unit Project Start Date Project End Date Proposal Type Instru	nent Type



5. Select "Under Review" to see those the proposal/s assigned to you. Then click the link under "Proposal #" to view the Proposal Form.

SPI	Dashboard		1							+	Start New Proposal
ľ	15 In Development Proposals are being filled out by researchers	1 Under Revie Proposals are bein	ew ginternal reviered 📢	0 Approved Proposals are appr submission	roved for	Submitted to Sponsor posals were submitted to sponsor 🏦	0 Under Cons Sponsors have con institution with int	ideration tacted your erest	0 Funded Proposals were acce sponsor	pted by the 【 🛛	
l	O Closed Proposals were closed by an admin for some other reason										
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	Project Title	Proposa	Ы	Status	Sponsor	Prime Sponsor	Admin Unit	Project Start Date	Project End Date	Proposal Type	Instrument Type
	UCR Subaward NIH_Monterrosa	21-0083-P0001	Allison Monterrosa	Under Review	University of California Riverside	e National Institutes of Health		11/30/2021	11/29/2023	New	Incoming Subaward

6. The Proposal Form reflects the information that we will capture for each proposal, as we had with the Sponsored Projects Approval Form. The Sections on the left navigation will have a red exclamation point, and once you click that section in the navigation, you should see a green check mark.

#### After:

	Proposal Form	Routing	History	Access	Tasks	Notes	Attachments	Links									
P	roposal Sections			Gen	eral Informat	tion											
	General Informa	ation	<ul><li>⊘</li><li>⊘</li></ul>	The I entri right	Proposal For es in order to to edit entries	m is initiated o avoid delay s if there are e	l early in the propo rs in processing the errors and to comple	sal development proposal. Princi te information the	t process and will be ipal Investigators/F at is left blank.	e populated by t Project Director	he Principal Inves s should complete	igator/Project as much inform	Director. Plea nation as they	ase be as complete can. Grants and C	e and accurate as contracts Developr	possible in your nent reserves the	
	Subrecipients		Ø	Once <u>Revie</u>	completed a w and Appro	and circulate val Procedure	ed in the proposal s or visit the Grants	tage, the fully ex s and Contracts E	ecuted Proposal Fo Development websi	orm authorizes ite.	the submission of	proposals to ext	ternal sponso	rs. For further inf	formation see the	Pre-Award	
	Internal Conside	erations	0	Seve	ral documen	ts will need 1	to be uploaded as a	ittachments into	the Proposal Form	1:							
	Proposal Abstra	ect	0	:	All proposa Where rele	als: Abstract evant: IDC/F	(Pl uploads in Abs &A Waiver Form (F	tract field) & Bud Pl uploads in IDC	lget (Grants and Co /F&A Waiver field),	ontracts Speciali , Subaward docu	st uploads on Atta iments (Grants and	chments page) I Contracts Spe	ecialist upload	s on Attachments	s page)		
	Summary Budge	et	0														
	Project Data		ø	Spo	onsor In	formati	on										•
	Export Control		Ø	Spon	sor*		University of C	alifornia Riverside			~						
	Intellectual Prop	perty	ø						Entity/agency from	m which CSUSM dir	ectly receives funding						
	Financial Conflic	ct Of Interest	ø	Prim	e Sponsor		National Institu	ites of Health			$\sim$						2
	Attachments An	nd Submission N	otes 📀				Agency that is the o	originating source of	f the project funding (L	eave blank if fundir.	ng is not pass-through						•
A	Internal Budget I	Lopdf ^	\Lambda Re_ Indire	ect cost epd	f ^												Show all



## 7. To see the Budget Summary and Personnel Portion of the budget, go to "Attachments" on the upper ribbon

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	Proposal Form	Routing	History	Access	Tasks	Notes	Attachments	Links
	Proposal Sections			Gen	eral Informa	tion		
	General Informa	tion	<b>S</b>	The entr	Proposal For	m is initiate o avoid dela	d early in the propos ys in processing the	al development process and will be populated by the Principal Investigator/Project Director. Please be proposal. Principal Investigators/Project Directors should complete as much information as they can.
	Investigators		Ø	right	t to edit entrie	and circulat	errors and to complet	e information that is left blank.
	Subrecipients		⊘	Revi	ew and Appro	val Procedur	e or visit the Grants	age, the fully exclude reposal form authorizes the submission of proposals to external sponsors. For and Contracts Development website.
	Internal Conside	rations	Ø	Seve	er <mark>al doc</mark> umer	its will need	to be uploaded as a	tachments into the Proposal Form:
	Proposal Abstra	ct	Ø		<ul> <li>All propos</li> <li>Where rel</li> </ul>	als: Abstract evant: IDC/F	t (PI uploads in Abst F&A Waiver Form (P	ract field) & Budget (Grants and Contracts Specialist uploads on Attachments page) l uploads in IDC/F&A Waiver field), Subaward documents (Grants and Contracts Specialist uploads on /
	Summary Budge	t	⊘					
	Project Data		0	Sp	onsor Ir	format	ion	
	Export Control			Spor	nsor*		· · · · · ·	

### 8. You can go to the upper left "Complete Review" to either Approve or Return to Development.

My Actions	Proposal Summary			Under Review 👻
Complete Review	PI: Allison Monterro Admin Unit:	Sponsor: University of California Riverside Prime Sponsor: National Institutes of Health Sponsor Deadline: 11/5/2021 Proposed Total Amount: ~	Project Start Date: 11/30/2021 Project End Date: 11/29/2023 Instrument Type: Incoming Subaward	Project: 21-0083
Proposal Form Routing History Proposal Sections General Information	Access Tasks Notes Attachments General Information The Proposal Form is initiated early in the propo	Links	stor/Project Director. Please be as complete and accurate as po	ssible in your
Investigators 📀	entries in order to avoid delays in processing the right to edit entries if there are errors and to comple Once completed and circulated in the proposal s Review and Approval Procedure or visit the Grants	proposal. Principal Investigators/Project Directors should complete as e information that is left blank. (age, the fully executed Proposal Form authorizes the submission of pr and Contracts Development website.	s much information as they can. <i>Grants and Contracts Developmen</i>	e-Award
Internal Considerations	Several documents will need to be uploaded as a <ul> <li>All proposals: Abstract (PI uploads in Abst</li> </ul>	tachments into the Proposal Form: ract field) & Budget (Grants and Contracts Specialist uploads on Attach	ments page)	
Proposal Abstract  Summary Budget	Where relevant: IDC/F&A Waiver Form (F Sponsor Information	l uploads in IDC/F&A Waiver field), Subaward documents (Grants and C	Contracts Specialist uploads on Attachments page)	My Tasks



9. Approve if the Proposal Record is approved. If you want to add a comment when you Approve you can, but it is not required. A comment is required if you select "Return to Development." Click Save.

mplete Review	
iew Decision*	
Approve	•
Approve	
Return to In Development	
Please add a comment.	
	Cancel
pr visit the Grants and Contracts Develop	nent website.