

Guide for Users Who Are Reviewers (Approvers) of Proposals

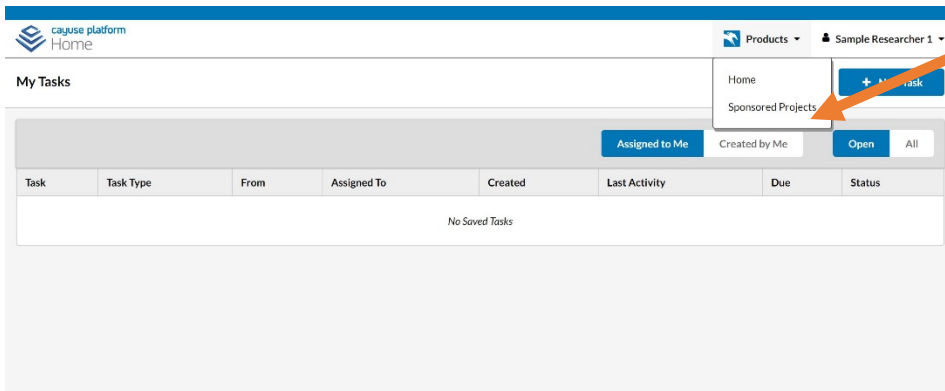
The following is intended to provide guidance on reviewing the Proposal Form in Cayuse. As Cayuse is a new for CSUSM, we welcome any feedback you have in accessing and navigating the Proposal Form and Cayuse in general.



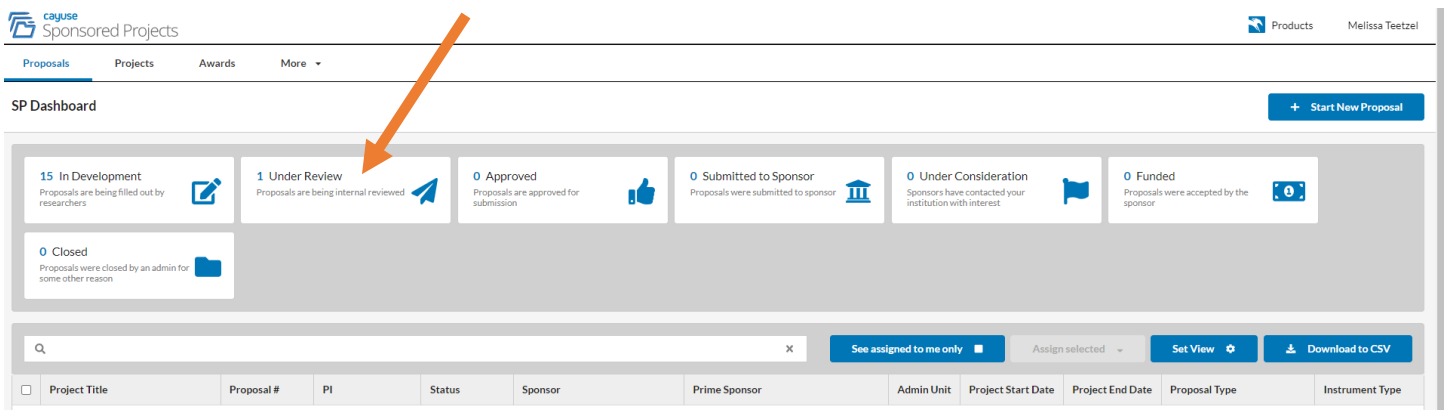
Your role as a reviewer of the Proposal Form is described in the [Pre-Award Review and Approval Procedure](#).

REVIEWING A PROPOSAL RECORD

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



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



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

SP Dashboard + Start New Proposal

15 In Development
Proposals are being filled out by researchers

1 Under Review
Proposals are being internal reviewed

0 Approved
Proposals are approved for submission

0 Submitted to Sponsor
Proposals were submitted to sponsor

0 Under Consideration
Sponsors have contacted your institution with interest

0 Funded
Proposals were accepted by the sponsor

0 Closed
Proposals were closed by an admin for some other reason

Q Status: Under review x

See assigned to me only Assign selected Set View Download to CSV

<input type="checkbox"/>	Project Title	Proposal	PI	Status	Sponsor	Prime Sponsor	Admin Unit	Project Start Date	Project End Date	Proposal Type	Instrument Type
<input type="checkbox"/>	UCR Subaward NIH_Monterrosa	21-0083-P0001	Allison Monterrosa	Under Review	University of California Riverside	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

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 ✔

General Information

The Proposal Form is initiated early in the proposal development process and will be populated by the Principal Investigator/Project Director. Please be as complete and accurate as possible in your entries in order to avoid delays in processing the proposal. Principal Investigators/Project Directors should complete as much information as they can. *Grants and Contracts Development reserves the right to edit entries if there are errors and to complete information that is left blank.*

Once completed and circulated in the proposal stage, the fully executed Proposal Form authorizes the submission of proposals to external sponsors. For further information see the [Pre-Award Review and Approval Procedure](#) or visit the Grants and Contracts Development website.

Several documents will need to be uploaded as attachments into the Proposal Form:

- All proposals: Abstract (PI uploads in Abstract field) & Budget (Grants and Contracts Specialist uploads on Attachments page)
- Where relevant: IDC/F&A Waiver Form (PI uploads in IDC/F&A Waiver field), Subaward documents (Grants and Contracts Specialist uploads on Attachments page)

Sponsor Information

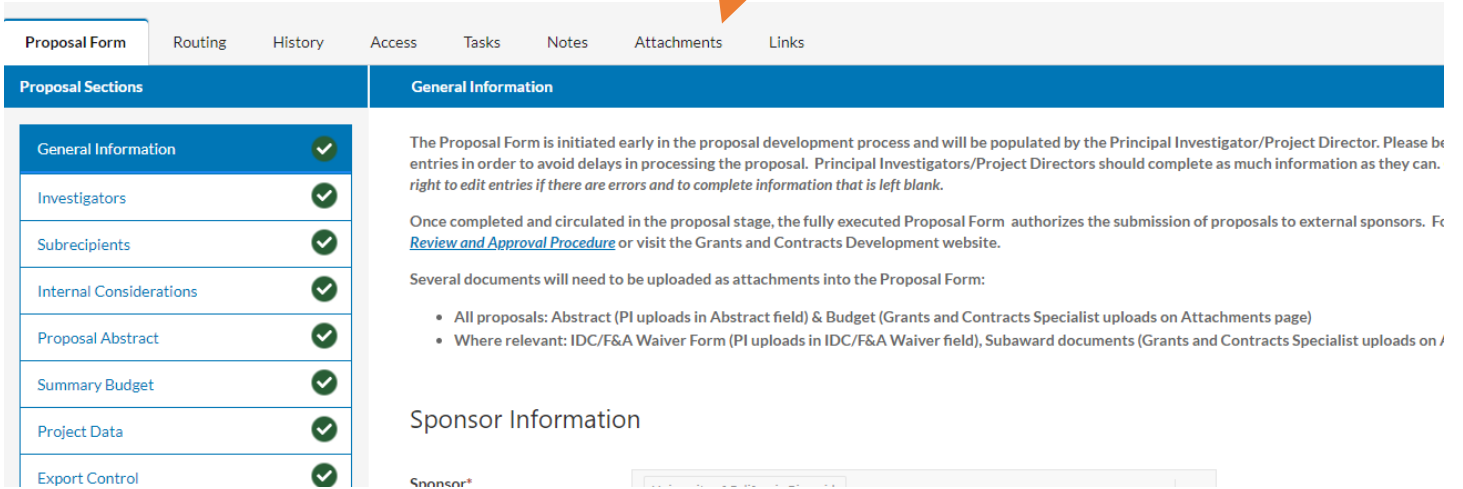
Sponsor* Entity/agency from which CSUSM directly receives funding

Prime Sponsor Agency that is the originating source of the project funding (Leave blank if funding is not pass-through)

Internal Budget Lo...pdf Re_Indirect cost e...pdf

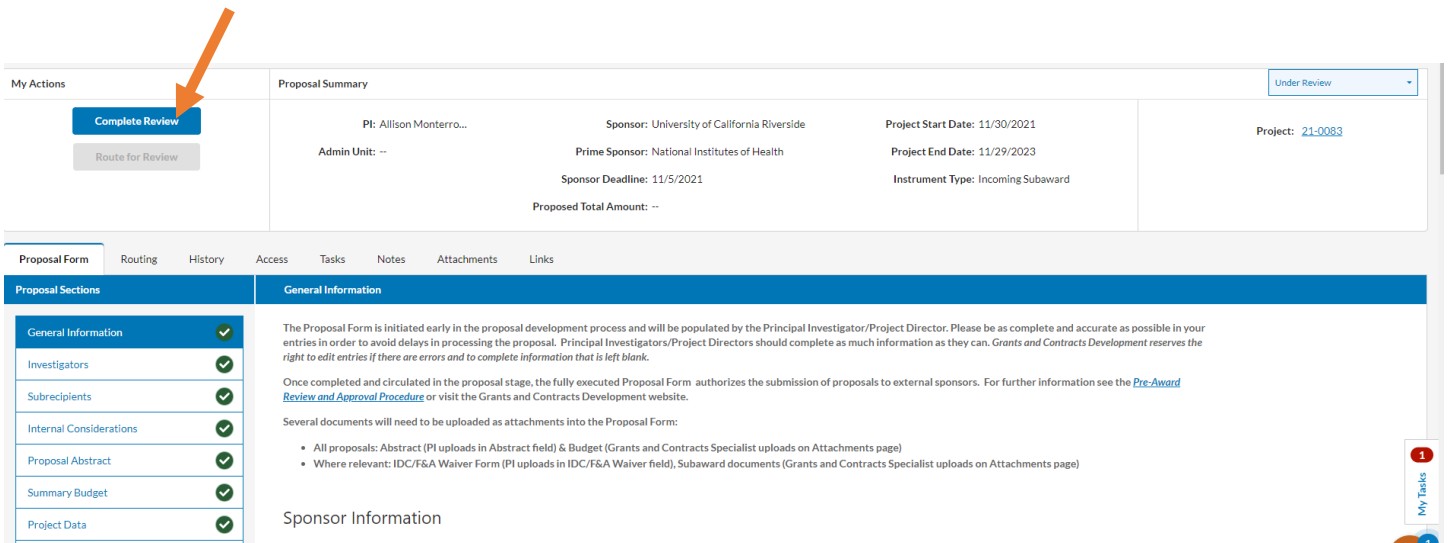
My Tasks 1 ? Show all

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



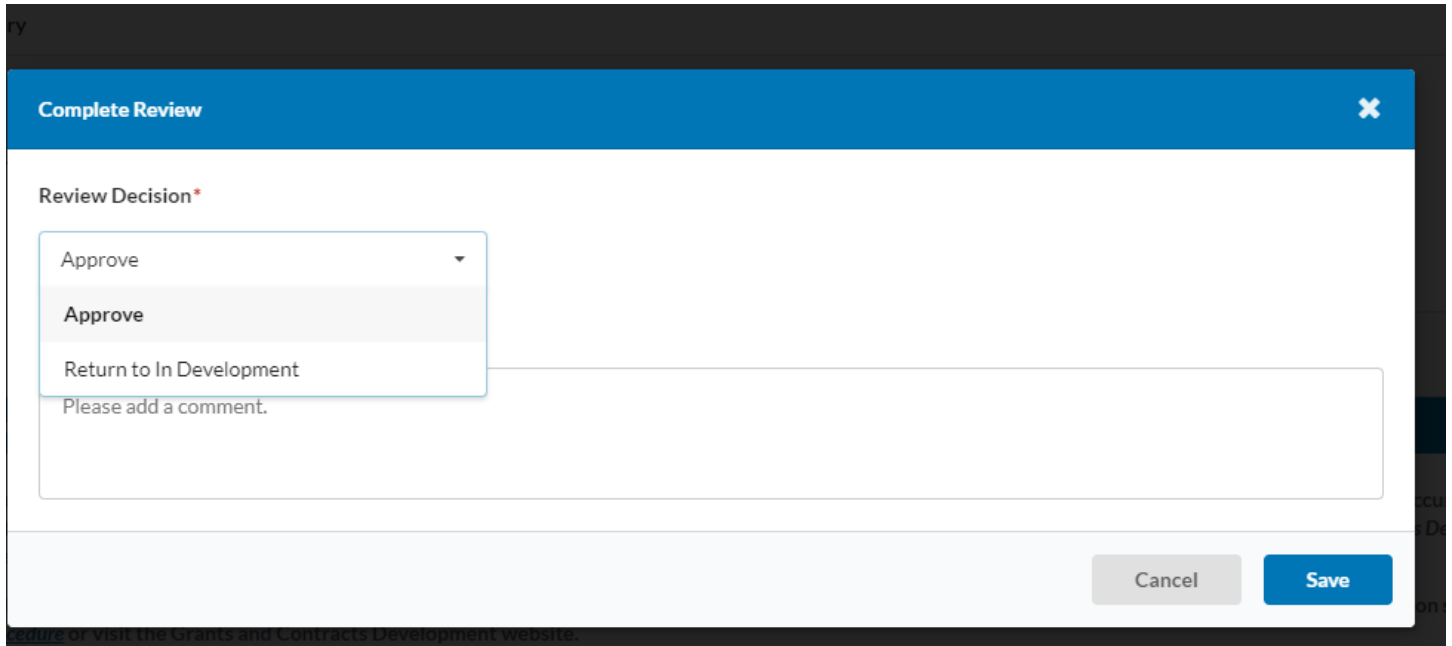
The screenshot shows the 'Proposal Form' interface. The upper ribbon contains tabs for 'Proposal Form', 'Routing', 'History', 'Access', 'Tasks', 'Notes', 'Attachments', and 'Links'. The 'Attachments' tab is highlighted with an orange arrow. Below the ribbon, the 'Proposal Sections' are listed on the left, and the 'General Information' section is displayed on the right. The 'General Information' section includes instructions for completing the proposal form and a list of documents to be uploaded as attachments.

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



The screenshot shows the 'Proposal Form' interface. The 'My Actions' section on the left contains a 'Complete Review' button, which is highlighted with an orange arrow. Below the ribbon, the 'Proposal Sections' are listed on the left, and the 'Proposal Summary' section is displayed on the right. The 'Proposal Summary' section includes details such as PI, Sponsor, Project Start Date, Project End Date, and Project ID.

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.



Complete Review

Review Decision *

Approve

Approve

Return to In Development

Please add a comment.

Cancel Save