Routing & Approvals in Cayuse 424

Guide for Pls and Co-Pls

Minimum software requirements:

Mozilla Firefox v. 3.0-16 Microsoft Internet Explorer IE7-IE9 Acrobat Reader



Logging on to Cayuse 424

You will receive an email notification that you have a proposal to review and approve:

```
Due to an approval action, the following proposal now requires your attention:

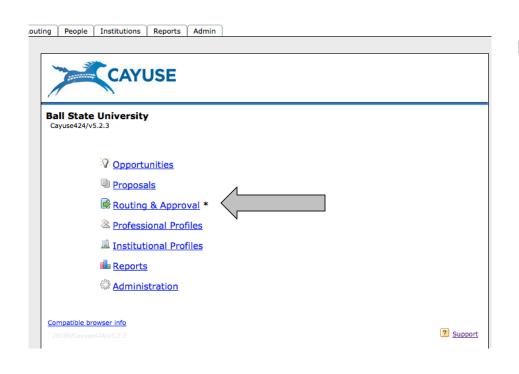
Routing - Proposal name would be here

Please navigate to "link" at your earliest convenience.

Note - the following comments were included with the action: Approved!
```

- Click on the link in the body of the email, or
- Go to http://bsu.cayuse424.com/. Log on using your BSU username and password. If you need assistance logging in, please contact SPO. Proposals available for your review are under the "Routing" tab.

Logging on to Cayuse 424

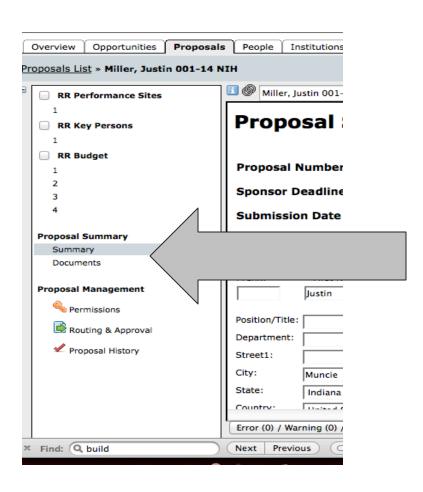


Upon logging in, the asterisk next to "Routing & Approval" indicates you have proposals pending your review and approval.

Reviewing the Proposal

- On Federal Proposals, each of the required forms can be selected from the left-hand menu.
- For all proposals, the "Proposal Summary" section contains a summary for review as well as internal attachments.

Reviewing the Proposal

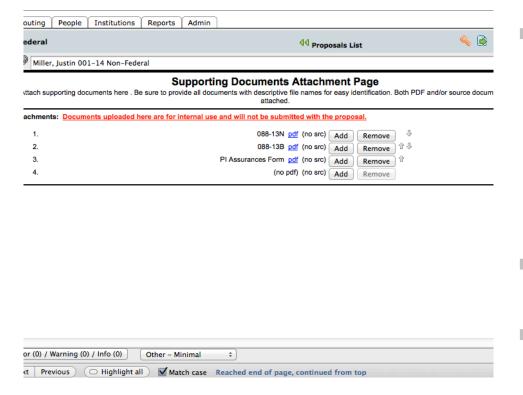


- The Summary link describes the basic of the proposal, including PI, sponsor, dates, and requested amount
- The Documents link
 will include the PI
 Assurances document,
 BSU internal budget,
 and project narrative

PI/Co-PI Assurances Form

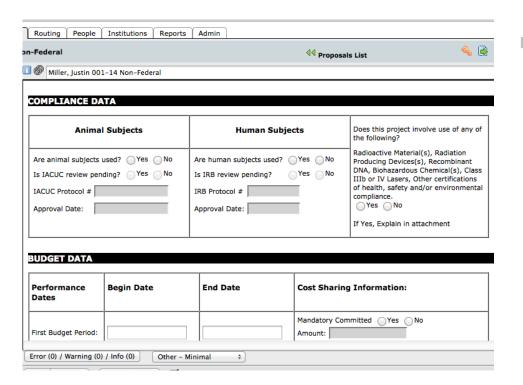
- You will need to complete a PI or Co-PI Assurances Form, which covers areas related to Conflict of Interest/Compliance, Intellectual Property, and the Project Director's Statement.
- This form can either be uploaded at this time by the PI/Co-PI or sent to your SPO PM for uploading.

Reviewing the Proposal



- Click on the "pdf" link to view the narrative (ends in "N"), budget (ends in "B") or additional internal attachments this is where the PI Assurance Form is uploaded.
- Click "Add" to upload your Form to the proposal.
 - The PI Assurance Form is proposal specified and must be completed for every proposal submission.

Project Summary



Within the "Summary" page, PIs are required to complete the sections related to "Compliance Data" or to forward that information to their Proposal Manager to be entered into Cayuse

Routing "Rules"

- Proposal approval must follow the routing chain. Reviewers can look at a proposal once it hits their Routing List, but they cannot approve it until the previous reviewers on the routing chain have signified their approval
- Once a proposal is routed, Cayuse424 grants temporary permission to reviewers to access the proposal
- In case of an emergency a reviewer may be deleted from the chain (or skipped). Please contact your Proposal Manager if you require this step

Approving the Proposal

- Reviewers indicate their approval by checking the box adjacent to their name
- Once approved, the next reviewer on the routing chain is notified via email
- As soon as the SPO Director (or Delegate) checks their box, an email is sent to everyone on the routing chain and electronic submission to Grants.gov by SPO can proceed



Routing History

| usemame | person | type | date/time | comments |
|----------|---|------------|------------------|----------|
| ahoff | Hoff, Andrew (U of C) / University of Cayuse | Approve | 2008-08-25 13:53 | |
| mspears | Spears, Michael (U of C) / University of Cayuse | Approve | 2008-08-25 13:52 | |
| jheldens | Heldens, John (U of C) / University of Cayuse | Approve | 2008-08-25 13:52 | |
| jheldens | | Modify | 2008-08-25 13:22 | |
| jheldens | | Modify | 2008-08-25 13:22 | |
| do | | مرجورة مصا | <u> </u> | A. A |

All routing actions are logged in the proposal's Routing History

Finished!

- After you check the box next to your name to approve, the next approver will be notified.
- Note that under the "Routing" tab, you will be able to see all proposals requesting your approval.
 - Each proposal will show how long it has been in the review process and how many steps away you are from being able to approve the proposal.
 - Click on the link to be given access to the proposal for review purposes only.

| 3 pro | oposals which may soon requ | uire action | . 🖻 |
|-------|--------------------------------|-------------|----------|
| | Proposal | Steps away | Days old |
| | Britto, Lucille - NSF Proposal | 1 | 0 |
| | Copy of LaLonde, David R21 | 1 | 0 |
| | Heldens, John 2/5/09 | 2 | 0 |

What if...

I have questions or concerns?

Contact your <u>Proposal Manager</u> or Brenda Ayers in SPO (765-285-1602 or bsayers@bsu.edu)