Each topic is linked to its location in the guidance document.

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Cayuse Submission Guidelines:
University Facilitating Fund

Browser Settings
- The preferred internet browser for the Cayuse System is Mozilla Firefox version 21 but it can be accessed through Internet Explorer version 9 as well.
- You will need the following configurations:
  - JavaScript Enabled
  - Cookies Enabled
  - Pop-Up Blockers Disabled
- Please view the appropriate link below for detailed instructions on how to configure these features:
  - Firefox Settings
  - Internet Explorer Settings
  - FOR MAC USERS: you can use Cayuse 424 on Macintosh computers. We recommend using the Firefox browser, but Cayuse 424 provisionally supports Safari and Chrome.

Registration (SKIP to “Logging into Cayuse” if you already have a Cayuse account.)
- All PI’s on UFF proposals must have a Cayuse account in order to submit their proposal.
  Contact Laura Walker at (202) 994-9136 or alwalker@gwu.edu (emails are preferred).

Logging Into Cayuse
- Go to https://gwu.cayuse424.com/
- To add to your browser favorites or bookmarks, you will have to manually type in the address.
- Your username is your GW NetID (the part of your e-mail address that proceeds @gwu.edu) and corresponding password.
Creating a Proposal

- Click on the **Proposals** hyperlink in the middle of the screen or the **Proposals** tab on the top left of the screen.

- Click on the **green +Create Proposal** button in the upper right hand corner of the screen. This will create a new proposal:

- A pop-up screen will appear. In the pop-up screen, select **Other Proposal** as your Opportunity Type and click **Create**.
The following window will appear:

**Create New Proposal**

**Proposal Name:** UFF_TestPI_FY17

**Principal Investigator:** Test PI (Department/Center/Institute) / The George Washington University

**Organization:** The George Washington University

**Default IDC Rate:** Please select...

**# of Budget periods:** 1

**Due Date:** 11/20/2014

**Validation Type:** Other - Minimal

---

### Field Name | Instructions
--- | ---
Proposal Name | Enter the Proposal Name as follows UFF_PI LAST NAME_FY17. *Example: UFF_Smith_FY17*

**Principal Investigator**

(Note: If the person that you want to designate as the PI is not listed in the drop-down menu, it is likely because that person is not designated as a Principal Investigator in their eRA role within their Professional Profile. This must be corrected by the PI within their Cayuse Professional Profile.)

To check the eRA Role for you or for Co-Investigators, please click on instructions here.

Organization | Select The George Washington University from the drop-down

Default IDC Rate | Skip

# of Budget periods | Select 1 as the number of years for the project

Due Date | Select 12/02/2015 as the deadline

Validation Type | Select Other-Minimal

- Click the Create Proposal button at the bottom of the page.
• A pop-up will appear stating that you did not indicate an IDC rate. **Click OK.**

![Pop-up message](image)

**Cayuse Navigation**

• After a proposal has been created, you will be led to this page:

![Proposal Summary screenshot](image)

• The left sidebar will serve as a checklist for completion. You can click on each item for more information which will appear in the main frame to the right of this sidebar.

• For UFF purposes **only**, you will be required to use certain sections listed in the left navigation: **RR Key Persons** (if there is a co-investigator on the proposal), **Proposal Summary**, **Documents** and **Routing & Approval**, all circled in the picture above.
Proposal Summary Information

- On the left sidebar, under Proposal Summary, click Summary. You will see the form pictured above.
- Complete only the fields listed below with the appropriate information provided below:
  If field is not listed, then skip.

<table>
<thead>
<tr>
<th>Cayuse Field</th>
<th>Information to provide</th>
</tr>
</thead>
<tbody>
<tr>
<td>PROPOSAL SUMMARY</td>
<td></td>
</tr>
<tr>
<td>Proposal Number</td>
<td>UFF_[PI’s Last Name]_FY17 Example: UFF_TestPI_FY17</td>
</tr>
<tr>
<td>Sponsor Deadline</td>
<td>December 2, 2015</td>
</tr>
<tr>
<td>Submission Method</td>
<td>Electronic</td>
</tr>
<tr>
<td>Submission Date</td>
<td>Current Date</td>
</tr>
<tr>
<td>Submitted By</td>
<td>Name of Submitter. If it is the PI, simply state “PI”</td>
</tr>
<tr>
<td>Submission Type</td>
<td>Application</td>
</tr>
</tbody>
</table>

INVESTIGATOR DATA – Many of these fields will be auto-populated by Cayuse but, in case they’re not, please make sure the following fields are filled out:

<table>
<thead>
<tr>
<th>First Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Name</td>
</tr>
<tr>
<td>Position/Title</td>
</tr>
<tr>
<td>Organization</td>
</tr>
<tr>
<td>Department</td>
</tr>
<tr>
<td>Street1</td>
</tr>
<tr>
<td>Street2</td>
</tr>
<tr>
<td>City</td>
</tr>
<tr>
<td>State</td>
</tr>
<tr>
<td>Zip Code</td>
</tr>
<tr>
<td>Country</td>
</tr>
<tr>
<td>Phone</td>
</tr>
<tr>
<td>Email</td>
</tr>
</tbody>
</table>

SPONSOR DATA

<table>
<thead>
<tr>
<th>Agency</th>
<th>OVPR</th>
</tr>
</thead>
<tbody>
<tr>
<td>Proposal Type</td>
<td>UFF</td>
</tr>
</tbody>
</table>

PROJECT DATA

<table>
<thead>
<tr>
<th>Title of Project</th>
<th>Title of the UFF Proposal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type of Proposal</td>
<td>Indicate “Other” and type UFF in the box below it. Under Type of Agency, select Other and type OVPR in the box below it</td>
</tr>
<tr>
<td>Kind of Application</td>
<td>Select New</td>
</tr>
<tr>
<td>Type of Project</td>
<td>Select Other and in the box indicate the category of support in which this proposal lies—Research or Scholarly Activity. (See page 2 of the Call for Proposals)</td>
</tr>
</tbody>
</table>

COMPLIANCE DATA

<table>
<thead>
<tr>
<th>Are animal subjects used?</th>
<th>Indicate Yes or No (If yes, please answer the following questions in the box)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Are human subjects used?</td>
<td>Indicate Yes or No (If yes, please answer the following questions in the box)</td>
</tr>
<tr>
<td>Will Radioactive or Biohazard Materials be used?</td>
<td>Indicate Yes or No (If yes, please offer an explanation in your narrative)</td>
</tr>
</tbody>
</table>

BUDGET DATA

<table>
<thead>
<tr>
<th>Performance Dates – Begin &amp; End Date</th>
<th>Under First Budget Period, type 7/1/2016 as the Begin Date and 6/30/2017 as the End Date.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Budget Period</td>
<td>Indicate the total requested amount from your budget here. The Total row and column will auto calculate.</td>
</tr>
</tbody>
</table>

- This information is automatically saved as you enter it so there is no option or need to manually save it.
- For more detailed information with screenshots of the Proposal Summary section, please click here.

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**Adding Key Personnel**

For UFF proposals, Key Personnel are limited to PI’s and Co-I’s. Co-I’s should be limited to GWU faculty. If the Key Person you want to add to the application does not appear in the menu, the person will need to request a Cayuse account by contacting Laura Walker at (202) 994-9136 or alwalker@gwu.edu (emails are preferred).

- Click on the **RR Key Persons** section in the left menu screen of the application.
- The Principal Investigator will automatically be added to the Key Personnel section. Information from the PI’s Professional Profile will populate in this section.
- Click the **Manage Key Persons** button on the right of the page:

![Proposal Summary](image)

Your screen will now look like this:

![Managed Key Persons](image)

- Click **Manage Key Persons**.
• A pop-up menu will appear. Click **Add Key Person**.

![Add Key Person](image1)

• The screen below will appear. You can either search for the Co-I using the **Search** function OR you can click **Show all** and select the individual from the alphabetized drop down menu.

• Click on the appropriate name to select the person from the menu provided and click the **Add Selected Key Person** button:

![Add Key Person to Proposal](image2)

• Once you’re done **adding Co-I’s**, click **close** in the top right hand corner.

• If you need to add additional Co-I’s, repeat the steps starting **here**.

• If any Co-Investigators you will want to add to the application does not appear in the menu, the person will need to request a Cayuse account by contacting **Laura Walker** at (202) 994-9136 or **alwalker@gwu.edu** (emails are preferred).
The list of the Key Persons can be viewed two ways:

**Collapsed:**

[Image of collapsed view]

**Expanded:** (You can see the “expanded” version by clicking the plus sign [+] on the far left of the person’s name. (Circled above in red.)

[Image of expanded view]

This information should remain blank as it does not affect your proposal for the UFF.

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Attaching Documents

- Click on the Documents section in the left menu screen – The Supporting Documents Attachment Screen will appear.

Please disregard the red text. This text is present for all proposals submitted through Cayuse and, it, therefore, pertains to proposals submitted to external agencies. Documents uploaded here WILL BE part of your UFF application.

- Click the Add button in the attachment section.
- A pop-up menu will appear:

  ![Upload attachment](image)

  After uploading, please view the uploaded attachment to verify its correctness.

  - Click the Browse button to browse for the PDF document you want to attach. Cayuse only accepts documents in Portable Document Format (PDF). If you need assistance converting MS Office documents to PDFs, please visit this website.
  - Leave Source of PDF blank.
After each document is attached, please rename each component according to the naming convention below. If this is not done after attaching each PDF, the Name will default to the original file name confusing the reviewer.

<table>
<thead>
<tr>
<th>Proposal Component</th>
<th>Naming Convention</th>
</tr>
</thead>
<tbody>
<tr>
<td>Abstract</td>
<td>Abstract.pdf</td>
</tr>
<tr>
<td>Narrative</td>
<td>Narrative.pdf</td>
</tr>
<tr>
<td>Budget</td>
<td>Budget.pdf</td>
</tr>
<tr>
<td>Budget Justification</td>
<td>Budget Justification.pdf</td>
</tr>
<tr>
<td>Biosketch (of the PI only)</td>
<td>Biosketch.pdf</td>
</tr>
<tr>
<td>Letter of Support (from the PI’s department chair only)</td>
<td>LetterofSupport.pdf</td>
</tr>
</tbody>
</table>

Click Upload and repeat as necessary.
After all six documents are added, this section is complete.

Establishing a Routing Chain

- On the left sidebar, under Proposal Management, click Routing & Approval. This will start the process of establishing a Routing Chain.

Because the UFF is an internal opportunity, the routing process will only involve the PI and Ann Laura Walker from the Office of the Vice President for Research. If there are co-investigators on the UFF proposal, do not add them to the routing chain. For the UFF competition only, the Authorized Organizational Representative (AOR) is Ann Laura Walker.

The order of individuals in the picture above is an example of the proper routing chain for an external proposal. You can delete individuals on your routing chain by following the instructions in the next page.
To Delete Individuals to your Routing Chain

- Click the button above the Routing Chain, circled above.
- This pop-up will appear:

- For UFF purposes, click the “X” button for the
  - Chair
  - Research/Associate Dean
  - Sponsored Projects Administrator
  - Sylvia Ezekilova, AOR for External Proposals
- This will delete these four individuals from the routing chain.
To Add the AOR your Routing Chain

- The PI of the UFF Proposal automatically appears first in the Routing Chain.
- The AOR is to be listed **below** the PI's name.
- Add the AOR by clicking the **green** plus sign at the top right of the screen.
- A pop-up window will appear.

![Edit Routing Chain](image)

- Click the **green** plus sign on the **bottom**.
- You can either search for the AOR using the **Search** function or you can click **Show all** and select the individual from the alphabetized drop down menu.
- Choose **Ann Laura Walker** as the required AOR and click **Add To Chain**.

![Add To Routing Chain](image)
• Click Close Edit Chain Window.

• This is what your Routing & Approval Screen will look like after the chain is formed.

Routing & Approval

Routing Chain

Begin

☐ Test, P I - The George Washington University: Department/Center/Institute

☐ Walker, Ann Laura - The George Washington University: Office of the Vice President

End

An AOR is on the routing chain, but has not yet approved this proposal. The proposal will not be submittable until an AOR has approved the proposal.

• Your routing chain is now complete.
Initializing Routing

- Once the Routing Chain is completed, it is up to the PI to initiate the routing process.
- This is started by clicking the box adjacent to their name.
- **Once routing is initialized, your proposal cannot be amended. It can be viewed only as “read-only.”**

![Routing & Approval](image)

- **Routing Chain**

![Routing Chain](image)

- Begin: Test, P I - The George Washington University: Department/Center/Institute
- End: Walker, Ann Laura - The George Washington University: Office of the Vice President f

- Whenever a proposal is initiated or approved by someone on the routing chain, Cayuse424 will prompt for approval of the action.
- Click **Approve:**

![Approve](image)

- Once this is done, submission is now complete.
- Please sign out of Cayuse. This is required so that the routing can be officially started.

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Important Notes

- Once OVPR confirms all components of the proposal and “approves” submission, the PI will receive an auto-generated email stating that it has been accepted. This may occur after the submission deadline.

- ‘Submission’ in this email indicates OVPR has received your proposal and it appears to have all components. Cayuse is used for external proposals and this feature is generally used to alert the PI that OVPR has approved their proposal and it is ready for submission to the external agency; however, for internal competitions, the proposal submission process is complete at this step.

Cayuse424 System Notification: proposal authorized for submission (Due: 12/2/2015)

Ann Laura Walker (Cayuse 424) <system@cayuse424.com>  Thu, Oct 24, 2013 at 1:26 PM
Reply-To: Ann Laura Walker <askovpr@gwu.edu>
To: TestPI <brp@cayuse.com>, Ann Laura Walker <askovpr@gwu.edu>

Due to approval by an AOR, the following proposal, due on Thursday, November 20, 2014, is now authorized for submission:

UFF_TestPI_FY16

Please navigate to http://gwu.cayuse424.com/proposal.do?proposalId=1012207256 to view the proposal.

Note - the following comments were included with the action:

‘Submission’ in this email indicates OVPR has received your proposal and it appears to have all components. Cayuse is used for external proposals and this feature is generally used to alert the PI that OVPR has approved their proposal and it is ready for submission to the external agency; however, for internal competitions the proposal submission process is complete at this step.