



Cayuse Proposals (S2S) User Manual

Georgia Institute of Technology
Office of Sponsored Programs

Table of Contents

Section 1: Introduction to Cayuse.....	3
Section 2: Professional Profile.....	7
Section 3: Funding Opportunities.....	11
Section 4: Proposal Basics.....	15
Section 5: Proposal Budgets.....	17
Section 6: Attaching Documents.....	23
Section 7: Submitting.....	25
Section 8: Revisions and Resubmissions.....	26

Please be sure to check out our Cayuse S2S FAQs and reach out to training@osp.gatech.edu with any questions that arise.

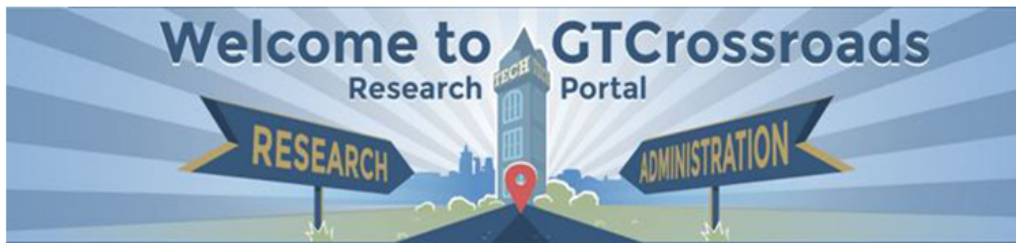
Section 1: Introduction to Cayuse

Learning Objectives

- ❖ Login to System
- ❖ Navigate CayuseS2S
- ❖ Understand the CayuseS2S Icons
- ❖ Set User Preferences
- ❖ User Tips

CayuseS2S Login

- Navigate to GTCrossroads: <https://osp.gatech.edu/gtcrossroads> or directly into Cayuse at <https://georgiatech.app.cayuse.com/>
- Allow for Pop-ups
- Enter your Tech credentials



GTCrossroads is the new research administration web portal for Georgia Tech researchers, faculty, and staff. The portal centralizes and streamlines all GT web systems to make it easy to access administration tools. All web tools and systems appear the same, but now they are centrally located and accessed through GTCrossroads. For example, the contract information system is accessed via the Apps tab, as is WebWISE.

How to Access GTCrossroads

Login to GTCrossroads with your Georgia Tech login and password for access to your administration tools (the same way signing in to a smartphone provides access to apps).

**Log into
GTCrossroads**

➤ Enter your Tech credentials

Georgia Tech Georgia Tech Login Service

Enter your GT Account and Password
Login requested by: gtcrossroads.gatech.edu

GT Account:

Password:

Warn me before logging me into other sites.

LOGIN clear

ATTENTION: When you are finished using all of your authenticated applications, please log out of this system and exit your browser to ensure you do not leave any of your applications (such as your e-mail) open to other users of this machine.

TERMS OF USE
This computer system is the property of the Georgia Institute of Technology. Any user of this system must comply with all Institute and Board of Regents policies, including the Acceptable Use Policy, Cyber Security Policy and Data Privacy Policy (<http://b.gatech.edu/it-policies>). Users should have no expectation of privacy, as any and all files on this system may be intercepted, monitored, recorded, copied, inspected, and/or disclosed to authorized personnel in order to meet Institute obligations.
By using this system, I acknowledge and consent to these terms.

[I don't know my GT Account](#)
[I don't know my password](#)
[My correct username and password aren't working](#)

For assistance, please contact the [OIT Technology Support Center](#) at 404-894-7173 (Mon-Fri 8am-5:00pm ET).
[Additional documentation including how to integrate your application with GT Login](#)

In order to access the Proposals (S2S) module (where you regularly prepare proposals for submission), click **Products** at the top right of the screen and then click into **Proposals (S2S)**:

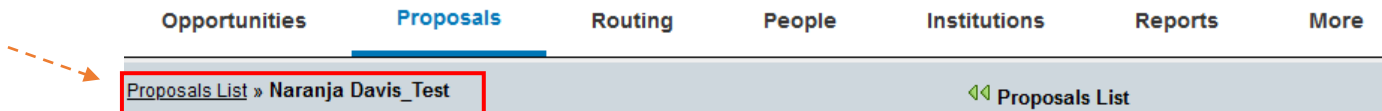









Navigation tabs/links within CayuseS2S



<ul style="list-style-type: none">➤ Opportunities<ul style="list-style-type: none">❑ Retrieve and view details of available opportunities❑ Create new proposals➤ Proposals<ul style="list-style-type: none">❑ Search for a proposal❑ Create/edit a grant proposal❑ Create/edit a subaward proposal❑ Import a subaward proposal➤ Routing<ul style="list-style-type: none">❑ View and access proposals that require your review and approval	<ul style="list-style-type: none">➤ People<ul style="list-style-type: none">❑ Search/view a professional profile❑ Create/edit a professional profile❑ Link a professional profile to an institutional profile➤ Institutions<ul style="list-style-type: none">❑ View the primary institutional profile❑ Create/edit an institutional profile➤ Reports<ul style="list-style-type: none">❑ Create reports from data within the Cayuse S2S system
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Navigation

- Breadcrumb trails provide a quick way to navigate between screens within a tab



- Dropdown menus allow quick access to additional information stored in the database
- Icons perform key tasks:
 -  To add or create
 -  To remove or delete
 -  To complete an autofill task
 -  To re-auto-filled information from other sources (an autofill refresher feature)
 -  To manage data
 -  Link to a professional profile.
 -  When clicked, provides quick help tips throughout the system

-  When clicked, provides information on certain items (a solicitation)
-  Used to save entries and changes made to the system. Hover your cursor over an icon to determine its function.
- When you click an icon, CayuseS2S will respond with prompts, forms changes, etc. to support the performance of the icon's activity.

Usage Notes:

- When exiting pop-up windows always click the **Close** button. Don't use your browser's "back" function.
- Be careful when copying and pasting to your proposal -- special characters (e.g., umlauts) will cause funding agencies to reject your proposal.
- Log out of the Cayuse system at the end of the day.
- Warning: If you break the lock when another user is in the proposal, they will lose any changes made since they last saved. We recommend not taking the lock until you have confirmed with the current user that they have saved all their changes.

Section 2: Professional Profile

Learning Objectives

- ❖ Professional Profile basics
- ❖ How to create a Professional Profile
- ❖ How to add biosketches
- ❖ How to assign permissions to a Professional Profile
- ❖ How to avoid duplicate Professional Profiles
- ❖ How to link the CayuseS2S user account to the Professional Profile
- ❖ Lock/Break Lock
- ❖ Routing/Approval Chain

Professional Profile & How to Use It

- Professional Profiles capture and store data about Principal Investigators, Key Personnel, Other Significant Contributors, Authorized Organizational Representative (AOR)/Signing Official (SO), etc.
- Before you create a grant application you must create a Professional Profile for the Principal Investigator who is named in the grant
- Information stored in the Professional Profile is auto-filled into the grant proposal once that individual is selected as a PI, Senior/Key Person, Authorized Representative, Administrative Contact, or Payee
- Profiles stored in CayuseS2S can be shared with others and used multiple times
- Multiple profiles can exist for one individual (dual associations, for example)
- If a profile has not already been created for any Key Personnel and Other Significant Contributors in a proposal, contact training@osp.gatech.edu for all Cayuse profile requests. OSP staff will add the individual's name, e-mail, and add the correct role. All additional information should be added to complete the Profile.

Creating and Searching for a Professional Profile & Institution Association

- Log in to CayuseS2S and click the **People** tab.



Opportunities

Proposals

Routing

People

Institutions

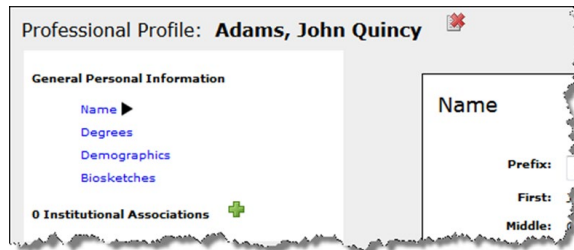
Reports

More

- Enter last first/last name
- Click on the name if listed
- If not listed, contact training@osp.gatech.edu to create a new profile

➤ Complete the following fields by clicking on the associated links:

1. Name
2. Degrees
3. Demographics
4. Biosketch



Biosketches

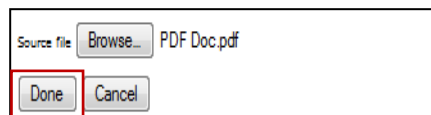
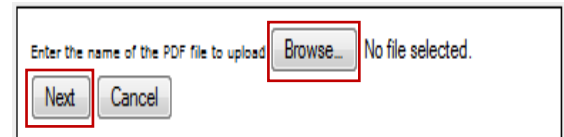
1. To upload a Biosketch to the Professional Profile, click **Biosketches** under **General Personal Information**, then click [Add Biosketch](#)

Biosketches

[Add Biosketch](#)

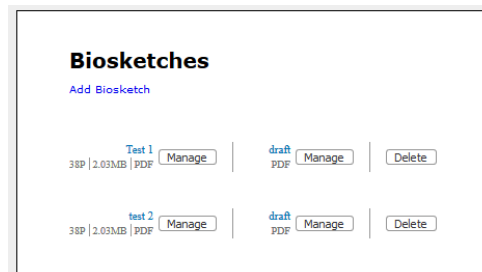
Currently no Biosketches are filed in Cayuse424 for "Davis, Naranja C.."

2. Type in a name for the Biosketch and click **Next**
3. Click **Browse** to locate a previously created biosketch (PDF)
4. Click **Next**
5. Repeat Step 3 to attach Source (Word) versions of the Biosketch (optional)
6. Click **Done**



Notes on Biosketches


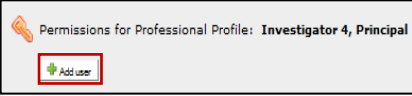
- Multiple Biosketches can be created and stored in each Professional Profile. You can store both a PDF & a Source file version.
- Once Biosketches are attached to the Professional Profile they can be easily attached to the proposal on the Senior/Key Personnel page





Create an Institutional Association if necessary

- Contact training@osp.gatech.edu for Institutional Associations

Adding Permissions

1. To grant other CayuseS2S users permission to your profile click the key icon  located in the upper right area of the Professional Profile screen
2. Click **Add user** 
3. Select an individual user from the list, or search by **first name, last name, or username**
4. Click **Close**
5. Once the user is added, check or uncheck permissions, as desired

	List	Read	Write	Autofill	Delete	Change Permissions	Add User/Group	Remove User/Group
 Admin, Cayuse (cayuseadmin)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
 Spears, Michael (mspears)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Add Security Principal [close](#)

[Show Recently Used](#) | [Show All](#)

Select **Users** or **Groups** below to provide access to this **Proposal**.

Showing **Search Results: 1 principal available**

Type	Group or User	Profile Name
U	mspears	Spears, Michael


Permissions Types:

List	Allows the “User” to view a profile on the Professional Profiles list
Read	Allows the “User” to view the details of a profile
Write	Allows the “User” to modify information on a Professional Profile
Autofill	Allows the “User” to Autofill the Professional Profile onto a proposal
Delete	Allows the “User” to delete a Professional Profile
Change Permissions	Allows the “User” to change security permissions associated with the Professional Profile
Add User	Allows the “User” to add other users to the Professional Profile
Remove User	Allows the “User” to remove a user from the Professional Profile

Notes on Permissions:

- Once a Professional Profile has been created, permissions can be assigned
- The creator of a Professional Profile is automatically granted all permissions associated with using that profile
- The profile creator can share the profile with other users by granting appropriate permissions
- Permissions can be changed or removed

Proposal Lock Feature

- When you are working on a proposal, all other users who have permission to that proposal will see the lock icon adjacent to that proposal, followed by your name, when they log into CayuseS2S
- The icon signifies that the proposal is locked by another system user
- Only persons who have been granted permission to “Break Lock” can break your lock
- Persons without the break lock authority can still open up the proposal in read-only format, but they will not be able to enter data or add attachments
- Click the  icon to access read-only
- When breaking a lock, contact the user first if possible to ensure they have saved their work

Routing and Approval

Upon beginning a proposal in Cayuse, one of the first things that an initiator should do, in addition to updating the permissions, is to edit the Routing and Approval chain.





Note: Georgia Tech **does not** use Cayuse as an official routing/approval process. We utilize **eRouting** as the official routing/approval for externally submitted proposals/contracts.

It is advised that initiators add the **Project Director/Principal Investigator (PD/PI)** to the routing chain in order to review for accuracy throughout the process. If the PD/PI is not included in the Cayuse routing chain and is only approving through eRouting, the **unit is responsible for ensuring consistency between the two** as the CO will likely only have time to review in Cayuse.

It is also an easy way to share the proposal with the appropriate **Contracting Officer (CO)** as the Authorized Organizational Representative (AOR) for review and submission.

An AOR is able to submit even if no people are added to this step within Cayuse, so long as they have the **appropriate approvals in eRouting**.

Steps:

- 1) Click on the  icon to enter the Routing & Approval chain.
- 2) Click on  **Edit Chain?** to edit the routing chain.
- 3) The PD/PI should have defaulted as the first person on the routing chain. Use the  icon to add additional individuals as desired. You also want to include the appropriate CO/AOR as last in the chain (COs are notated by an asterisk in the search list) to avoid any additional potential errors. Pay attention to the submission icon: 

Note: Be cautious about which **+** symbol you click (above/below) – It should be in the appropriate order, with the CO/AOR in the last spot of the chain.

Section 3: Funding Opportunities

Learning Objectives

- ❖ Understand what an “opportunity” is
- ❖ Determine if an opportunity has been downloaded into the CayuseS2S system
- ❖ Download opportunities from Grants.gov into CayuseS2S
- ❖ Manage opportunities
- ❖ Create a new proposal
- ❖ Navigate the proposal
- ❖ Validate and track errors
- ❖ Assign proposal permissions

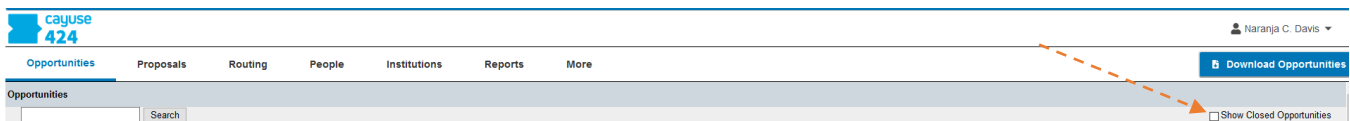
Opportunities


An opportunity is a grant application package that is downloaded into the CayuseS2S system, completed, and routed to Contracting Officers for review prior to submitting to Grants.gov. Before you begin to build your proposal you need to determine if the opportunity you are applying for has already been downloaded into the CayuseS2S system. Once the opportunity is downloaded into CayuseS2S, proposals can be built. You do this by reviewing the Opportunity List within CayuseS2S.

How to Determine if an Opportunity Has Been Downloaded

To determine if your opportunity has been previously downloaded into the Cayuse S2S system, the opportunity must be searched for within the system

1. Click the Opportunities tab, which displays a list of opportunities that have already been retrieved and are still open
2. To show closed opportunities, click the “Show closed opportunities” checkbox

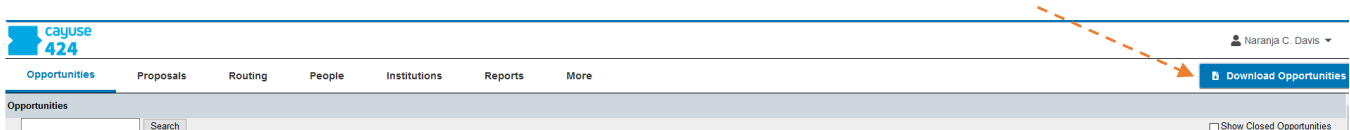


3. Search for opportunities by entering an opportunity number into the search box and clicking **Search** (if you find the opportunity you are looking for, there is no need to retrieve the opportunity again)
4. Sort lists by clicking column headings
5. Click the blue info icon  to view detailed opportunity information


How to Download an Opportunity

If your opportunity has not been previously downloaded, it must be before you can proceed

1. Click the **Opportunities** tab
2. Click the **Download Opportunities** link



3. Enter the Opportunity Number pulled from Grants.gov into the required field. We do not recommend you use the CFDA#

 **Download Opportunities**

To download Federal opportunities, please specify one of the following values.


Opportunity Number:

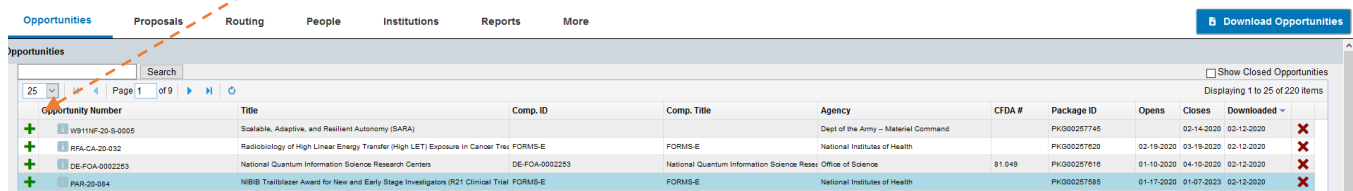
CFDA #:

Package ID:

4. Click **Download Opportunities**

Create a new proposal

1. Search for the opportunity number after clicking the Opportunities tab (refer to the previous section if an opportunity needs to be imported into the system)
2. Click the  **Create New Proposal** button once the opportunity is pulled up



Opportunity Number	Title	Comp. ID	Comp. Title	Agency	CFDA #	Package ID	Opens	Closes	Downloaded	
W911NF-20-S-0005	Scalable, Adaptive, and Resilient Autonomy (SARA)			Dept of the Army - Materiel Command		PK000257745	02-14-2020	02-12-2020	X	
RFA-CA-20-032	Radiobiology of High Linear Energy Transfer (High LET) Exposure in Cancer Trial	FORMS-E	FORMS-E	National Institutes of Health		PK000257620	02-19-2020	03-19-2020	02-12-2020	X
DE-FOA-0002253	National Quantum Information Science Research Centers	DE-FOA-0002253	National Quantum Information Science Reser	Office of Science	81.049	PK000257616	01-10-2020	04-10-2020	02-12-2020	X
PAR-20-084	NIBIB Trailblazer Award for New and Early Stage Investigators (R2) Clinical Trial	FORMS-E	FORMS-E	National Institutes of Health		PK000257585	01-17-2020	01-07-2023	02-12-2020	X

3. Enter a **Proposal Name** (use a name that will make your proposal easy to locate in the future)

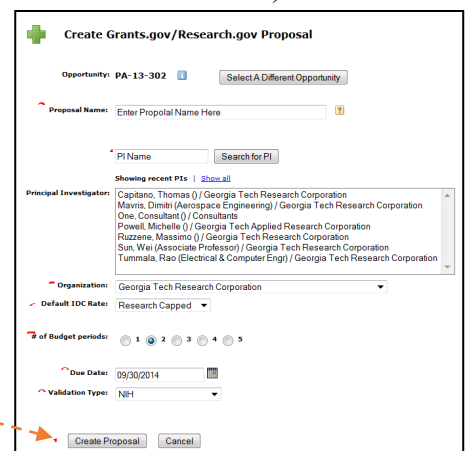
NOTE: You can rename the proposal at a later time by clicking the name field while on the actual proposal forms page and entering a new name

4. Select **Principal Investigator** using the list and search features provided
5. Choose the **Organization** (GTRC on behalf of GIT or GTARC on behalf of GTRI)
6. Select Default IDC Rate
7. Choose the **# of Budget Periods**
8. Enter the proposal's **Due Date**

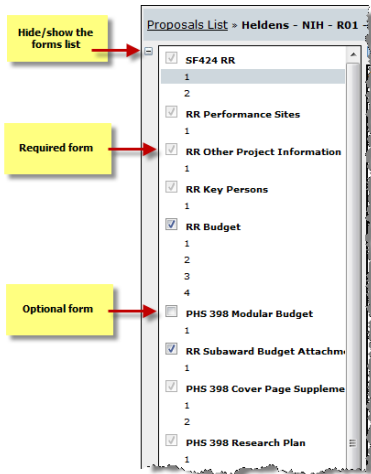
- Choose **Validation Type**
- Determines which agency validations will be used on the form set

9. Click **Create Proposal**

NOTE: CayuseS2S creates the SF424 form set required by the opportunity



Navigating the Proposal



- All forms are listed in the navigation bar located on the left side of the screen
 - Use the left panel to navigate the form set
 - Checkboxes control which forms are submitted electronically to the agency
 - Mandatory/required forms are automatically checked and cannot be unchecked
 - Optional forms can be checked to be included in the proposal submission (e.g. detailed vs. modular budget pages)
 - Page numbers are links to form pages
 - Click page numbers to display the page
- (Optional):**

- Click the minus sign to close the left navigation bar, then,
- Use the drop-down menu to navigate the form set

Errors and Warnings Notifications

CayuseS2S keeps a running total of all errors and warnings identified within a proposal. As errors and warnings are corrected, the running total decreases.

To Display Errors and Warnings:

1. Click the **Errors/Warnings** button at the bottom of the proposal page to display details
2. Click any of the hyperlinks. CayuseS2S will display the page on which the Error/Warning occurs and highlight the field that contains the Error/Warning

Error (45) / Warning (9) / Info (1)	NIH
Error: [SF424rr 1.1] One of the Type of Submission radio buttons must be selected	
Error: [SF424rr 1.14] The Phone Number for the PD/PI Contact Information is required	
Error: [SF424rr 1.14] The Email address for the PD/PI Contact Information is required	
Error: [PerformanceSites 2] Street1 is mandatory	
Error: [PerformanceSites 2] City is mandatory	
Error: [PerformanceSites 2] Country is mandatory	

Errors are fatal. Any proposal that is submitted with errors will be rejected by Grants.gov or the granting agency

Warnings are not fatal, but be sure if you are submitting a proposal with warnings that you have determined the warning will not cause the proposal to be rejected or delayed by the granting agency



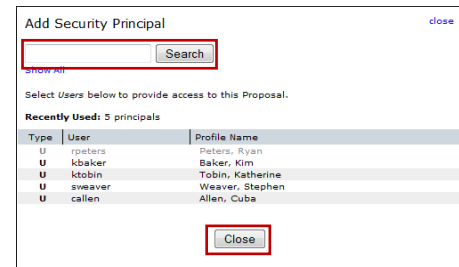
Info tips are informative recommendations from Cayuse. Forgetting to enter a sponsor deadline, for example, prevents the deadline from appearing in your list of proposals. Cayuse will alert you when this happens. Info messages are specific to the software and do not prevent proposals from being submitted or from being reviewed.

Proposal Permissions

Proposal Permissions are separate and distinct from Professional Profile permissions. **Whoever creates the proposal is given full permissions and only the proposal creator can initially grant permission(s) to other users.** Appropriate proposal permissions must be granted to other users who must have access to the proposal. Typically, that includes Principal Investigators, Research Administrators, and Reviewers.

1. To grant permission(s) to other CayuseS2S users click the **Permissions key**

2. Next, click **Add user**



3. Scroll or search by **first name, last name, or username** and select an individual user

4. Click **Close**

5. Provide permissions for user

	List	Read	Write	Attach	Break Lock	Delete	Print	Change Permissions	Add User/Group	Remove User/Group
Heldens, John (jheldens)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Spears, Michael (mspears)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Permissions Defined


List	Allows the “User” to see the proposal in a list of proposals
Read	Allows the “User” to read the contents of a proposal
Write	Allows the “User” to modify all data within the proposal and run Final Review
Attach	Allows the “User” to attach documents to the proposal
Break Lock	Allows the “User” to take write access while another user is in the proposal
Delete	Allows the “User” to delete a proposal
Print	Allows the “User” to print the proposal
Change Permission	Allows the “User” to change security permissions on a proposal
Add/Remove User Group	Allows the “User” to add or remove other users from the proposal
Submit	Allows the “User” to submit a proposal to Grants.gov

Section 4: Proposal Basics

Learning Objectives

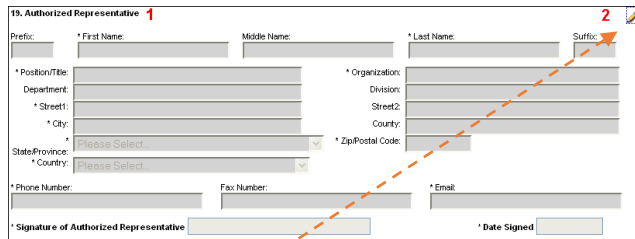
- ❖ Autofill data into the proposal
- ❖ Add Performance Sites
- ❖ Add and Sort Key Personnel
- ❖ Attach Biosketches


Autofill Feature

Use the pencil icon to autofill fields. Autofilled information is extracted from either the Professional or Institutional Profile(s). If profile information changes during the proposal preparation process, you can click the re-autofill button  to import the most recent information. When you autofill certain sections, CayuseS2S also autofills other logically connected fields. When the proposal is created and displayed for the first time, Applicant, Organization & Principal Investigator data have already been autofilled.


Using Autofill

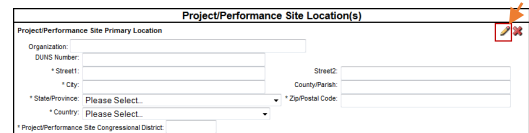
1. **Locate the section** of the proposal you would like to autofill (e.g. Authorized Representative – Box #19 on the Face Page)



2. **Click the pencil** 
3. **Select the appropriate data to be autofilled**
4. **Click Close** Autofill Window
5. Notice data has been autofilled into section

Using Autofill to Add Performance Sites

- If adding a new site, complete form manually or...
- Add a pre-existing Performance Site by selecting the autofill Pencil 
- Contact training@osp.gatech.edu to add institutions not listed



Primary Performance Site Autofill



Also show available **Institutional Profiles**

Emory University - Institutional Profile
Ernst-Moritz-Arndt-University of Greifswald - Institutional Profile
Fiji School of Medicine - Institutional Profile
Florida International University - Institutional Profile
Fort Valley State University - Institutional Profile
Geisinger Clinic - Institutional Profile

Adding Senior/Key Personnel


CayuseS2S allows you to add as many Senior/Key Persons as needed and provides a sort button that automatically orders the Key Persons list by role and name. After autofilling the Project Director/Principal Investigator on page 1 of the SF424, CayuseS2S autofills that Key Personnel within the RR Key Persons form and on page 1 of the budget form. However, use the following steps to add other Senior/Key Persons to the proposal.



Adding Senior/Key Persons:

1. Navigate to the **SF424 RR Key Person** page
2. Click the autofill icon 
3. Search within the search field. Then click 

The Autofill Window displays all information currently stored for that individual. In the Key Persons autofill window you can:

- Edit Role
- Define budget periods during which Key Persons will be named in the grant. By checking or unchecking the **Budget Period** boxes you can control whether or not the name and salary information autofills onto the budget page
- Attach biosketch
- Edit appointment type & salary, escalate salary and enter the level of effort

 Manage Key Person

  Hendrickson, Deanna - Georgia Tech Applied Research Corporation

Final | Draft

Biographical Sketch No final | No draft

Current & Pending Support No final | No draft

Role: Other Project Role Category:

Appointment type (months): Calendar: Academic: Summer:

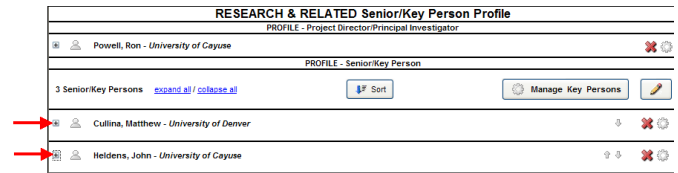
Budget	Cal. Salary	Acad. Salary	Sum. Salary	Cal. Months	Acad. Months	Sum. Months	Req. Salary	Fringe Benefits	Funds Requested
prd 1	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>

Attaching Biosketches to the Proposal

The **Attach Biosketch** button enables you to attach a PDF and the Source (Word) file from the Professional Profile and other locations using the Browse button.

To attach a Biosketch:

1. Navigate to the **SF424 RR Key Persons** page
2. Expand a profile by clicking the plus sign
3. Click the **Add** button next to “Attach Biographical Sketch”
4. Attach a biosketch already uploaded into the system or browse for one



RESEARCH & RELATED Senior/Key Person Profile	
PROFILE - Project Director/Principal Investigator	
✖ Powell, Ron - University of Cayuse	✖
PROFILE - Senior/Key Person	
3 Senior/Key Persons expand all / collapse all Sort Manage Key Persons	
✖ Cullina, Matthew - University of Denver	✖
✖ Heldens, John - University of Cayuse	✖

***Attach Biographical Sketch**

Final | Draft

[Sample Proposal](#) | No draft

1P | PDF | 36.88KB | --

Manage Delete

Section 5: Proposal Budgets

Learning Objectives

- ❖ Basic Budget Concepts
- ❖ How to use CayuseS2S to create a:
 - Detailed Budget/Modular Budget
 - Subaward Budget
- ❖ Link to a subaward proposal
- ❖ Import a subaward proposal
- ❖ Export a subaward proposal

Basic Budget Concepts

CayuseS2S allows you to start building your budget at any point in the form set, including the SF424 RR Budget pages, Modular Budget page and Subaward Budget page. CayuseS2S also autofills Senior/Key Persons information, including salary, appointment type, and fringe rate amount from their Professional Profiles. Once salary, effort, and other requested fund amounts are specified, the system performs budget calculations. CayuseS2S allows the user the flexibility to override auto-filled salary amounts if necessary and performs cost replication and escalation for all budget categories on multiple budget periods. In the event salary data cannot be retrieved from the Professional Profile it can be manually entered into the appropriate fields on the budget.

Budget Periods

- Up to five budget periods can be specified
- The number of Budget Periods can be changed once the proposal is created
- When working with multiple budget periods, it is important to ensure that the correct data (e.g., months of effort, IDC rates, travel expenses, etc.) is input for all relevant budget periods; otherwise, the proper calculations will not occur


Indirect Cost Rates

- Indirect Cost types/rates are set in the Institutional Profile
- When you create a proposal, all indirect cost types/rates associated with that institution will be used as a basis for calculating the budget

Fringe & Benefits Rates

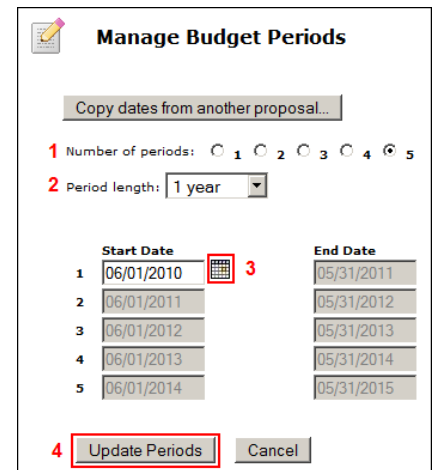
- Fringe Rates and Benefits are set in the Institutional Profile
- Default rates for individuals can be set once they are affiliated with an institution
- Fringe rates specific to an individual can be added in their Professional Profile
- Pertinent fringe rates are applied automatically to all salary calculations
- Autofilled fringe rates can be overridden if necessary

How to use CayuseS2S to create a Detailed Budget

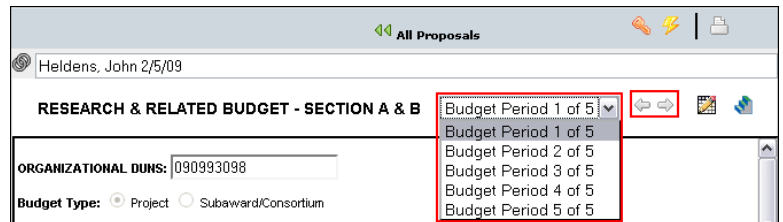
While on the proposal's budget form, click on the calendar icon  to set the proposal's **Start Date** and **End Dates**. CayuseS2S allows you to set and edit the period start and end dates in several places, including the **SF424 RR Budget, Modular Budget, and SF424 RR Face Page**

Setting the Periods

1. The number of periods is pre-defined when you create the proposal. Edit if required
2. Select **Period Length** using the drop-down menu
3. Click on the calendar icon to set dates
4. Click the **Update Periods** button
 - CayuseS2S autofills start and end dates for all budget periods based on selections



Use the Budget Period drop-down menu or navigation arrows to navigate, view, and edit different budget periods

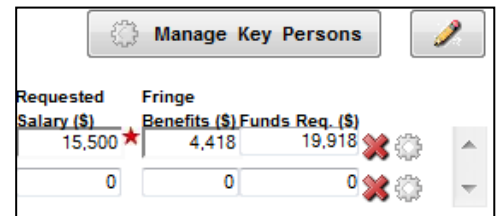


Section A: Senior/Key Personnel

Key Persons are generally added to the **SF424 RR Key Persons** page. However, you can also add them and edit the data in Section A of the budget form.

Edit Key Persons fields (if necessary)

- Once data is autofilled you can manually change any field
- If you override a calculated field, the system will insert a red star adjacent to the field
- Once a field has been overwritten, auto-calculate will no longer work on that field



Section B: Other Personnel

Manually enter

- Number of Personnel
- Project Role
- Effort Months
- Requested Salary
- Fringe Benefits

B. Other Personnel					* Fringe * Funds		
* Number of Personnel	* Project Role	Cal. Months	Acad. Months	Sum. Months	Requested Salary (\$)	Requested Benefits (\$)	Requested Funds (\$)
2	Post Doctoral Associates	12.00			36,600	6,250	42,850
1	Graduate Students	3.00			6,500	425	6,925

Select Indirect Cost Type for Sections A and B using the drop-down menu

- The default indirect cost type from the Institutional Profile will be auto-populated during proposal creation
- CayuseS2S applies the correct rate to Key/Senior Persons and Other Personnel and auto-calculates **Funds Requested (\$)** and **Total Salary, Wage and Fringe Benefits**

Indirect Cost Types for Sections A and B Above:

Req. Salary	Fringe
Research Ca ▾	Research Ca ▾

Section C: Adding Equipment

1. Click **New Equipment Row**
2. Enter **Equipment Item**
3. Enter **Funds Requested**
4. Select **Indirect Cost Type** using the drop-down menu (“excluded” is set as default)

C. Equipment Description

List items and dollar amount for each item exceeding \$5,000

Equipment item		* Funds Requested (\$)
1 Microscope	2	3 5,000 ✖
<div style="border: 1px solid gray; padding: 2px; display: inline-block; margin-top: 5px;"> + New Equipment Row </div>		
Indirect Cost Type	4	Total Equipment 5,000

Section D, E, F, and J

1. Select **Indirect Cost Type** using the drop-down menu
2. Enter **Funds Requested (\$)** for each applicable line item

F. Other Direct Costs	Indirect Cost Type	Funds Requested (\$)
1. Materials and Supplies	Research Ca ▾	5,250
2. Publication Costs	Research Ca ▾	1,000
3. Consultant Services	Research Ca ▾	

Section H: Indirect Cost:

1. After selecting the **Indirect Cost Type** using the drop-down menu, CayuseS2S will automatically:
 - Enter the indirect cost rate (%)
 - This may be a composite rate if the IDC rate is escalating
 - Calculate the indirect cost base (\$)
 - Update Funds Requested (\$)
 - Autofill cumulative budget page

G. Direct Costs **Funds Requested (\$)**

Total Direct Costs (A thru F) 248,371

H. Indirect Costs Note: Indirect Cost types are defined in the Institutional Profile, under the Institutions tab. Bring any profile changes into budget by refreshing Applicant Organization.

Indirect Cost Type	Indirect Cost Rate (%)	Indirect Cost Base (\$)	* Funds Requested (\$)
1. Research Capped ▾	55.900	163,299	91,284
2. ▾			
3. ▾			
4. ▾			
Total Indirect Costs			91,284

Cognizant Federal Agency Office of Naval Research, David F. Godfrey, 703-696-2586
(Agency Name, POC Name, and POC Phone Number)

I. Total Direct and Indirect Costs **Funds Requested (\$)**

Total Direct and Indirect Institutional Costs (G + H) 339,655

Replicating Budget Data

If you are requesting funds for specific budget line items and would like to replicate that data on multiple budget periods, you can do so by following these steps while on the budget forms:

1. Click the stair steps on the **SF424 RR Budget** page



2. Enable the budget category you wish to replicate by clicking on the check box adjacent to the budget category
3. Select the budget periods which you would like the replicated data to be copied to
4. Click **Replicate Selected Categories**

1. CayuseS2S will automatically copy the first period
2. numbers for that budget category into any budget periods you specified

Enabled	Budget Category
<input checked="" type="checkbox"/> 2	A.) Senior/Key Persons
<input type="checkbox"/>	B.) Other Personnel - Salary
<input type="checkbox"/>	Other Personnel - Fringe Benefits
<input type="checkbox"/>	D.) Travel
<input type="checkbox"/>	E.) Participant/Trainee Support Costs
<input checked="" type="checkbox"/>	F.1) Materials and Supplies

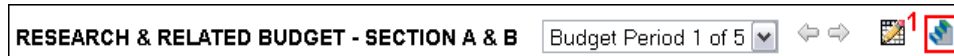
3 Start Period: Budget Period 1 thru End Period: Budget Period 2

4 **Replicate Selected Categories**

Escalating Budget Data

Escalation is like replication but uses a percentage increase per budget period for budget categories that are selected. If you are requesting funds for a specific budget line item(s) and would like to escalate that data on multiple budget periods, you can do so by following these steps:

1. Click the stair steps on the **SF424 RR Budget** page



2. Enable the budget category you wish to escalate by clicking on the check box adjacent to the budget category
 - Change the escalation rate to the desired rate
3. Select the budget periods which you would like the escalation to occur

4. Click **Escalate Selected Categories**

- CayuseS2S will automatically escalate the budget category(s) into any budget periods you specified

Enabled	Budget Category to Escalate/Replicate	Rate (%)
<input checked="" type="checkbox"/>	A.) Senior/Key Persons	3.0
<input checked="" type="checkbox"/>	B.) Other Personnel - Salary	3.0
<input checked="" type="checkbox"/>	Other Personnel - Fringe Benefits	3.0
<input type="checkbox"/>	D.) Travel	0.0
<input type="checkbox"/>	E.) Participant/Trainee Support Costs	0.0
<input type="checkbox"/>	F.1) Materials and Supplies	0.0
<input type="checkbox"/>	F.2) Publication Costs	0.0

Start Period: Budget Period 1 thru End Period: Budget Period 2

Pre-Escalate Budget Period 1 Selected

4 **Escalate Selected Categories**

The Cumulative Budget Page

- The **Cumulative Budget** page displays totals for all categories and costs/expenses, etc., indicated in the detailed budget pages.

- Cumulative budget totals are calculated by the system and cannot be overridden. If you find an error, correct it on the source page and the cumulative budget number will automatically be updated.

How to use CayuseS2S to create a Modular Budget

Modular Budgets are created in one of two ways:

1. Creating the detailed budget in CayuseS2S will automatically create a modular budget and round up to the nearest module
2. Enter modular budget figures directly into the Modular Budget page

Additional Notes:

In Cayuse, opportunity packages with a modular budget will also have a detailed budget attached. Both budgets will be labeled optional, but you must select one to submit. Ensure you select the appropriate checkbox.

You cannot submit detailed Subaward budgets with a Modular budget. If you check the subaward inclusion checkbox when you are using a modular budget, Cayuse will display an error.

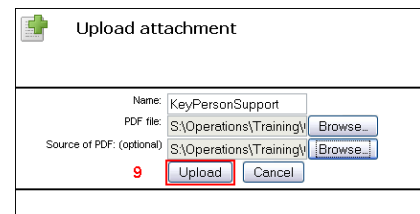
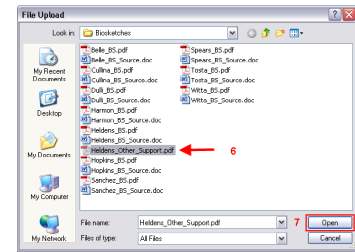
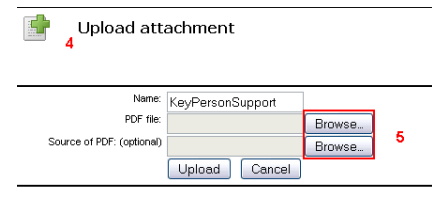
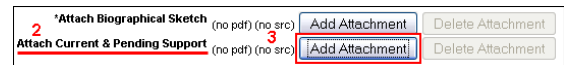
Section 6: Attaching Documents

Learning Objectives

- ❖ Attach documents to your grant proposal
- ❖ Attach your Research Plan
- ❖ Use the Research Plan “Exploder” in 5 easy steps
- ❖ View proposals in PDF format

Attaching Documents

1. Go to the appropriate page on the form set (e.g. Key Persons page)
2. Locate attachment point (e.g. Current & Pending Support)
3. Click **Add Attachment**
4. The **Upload Attachment** window enables you to attach the PDF and the source (Word) files
 - It is a good practice to upload both versions. Should the document require editing at a later time the source file is easily found by anyone working on the proposal
5. Click **Browse**
6. Locate the PDF version of the file you wish to attach
7. Click **Open**
8. Repeat for source file
9. Once you’ve added both files, click **Upload**

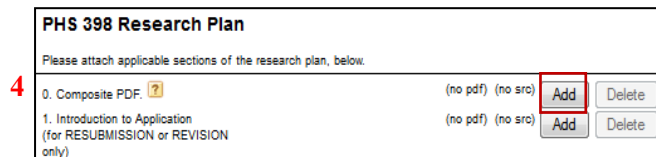
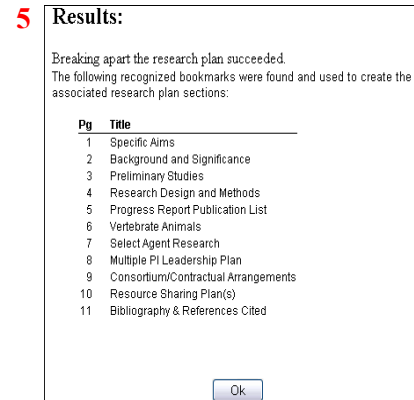
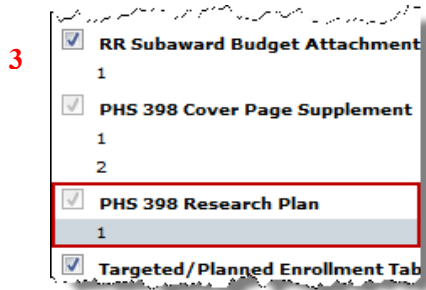


Attaching the Research Plan

To attach your Research Plan manually follow the 10 steps above. To attach your Research Plan “all at once” you can use the “**Exploder**” process (described below)


Using the “Exploder”

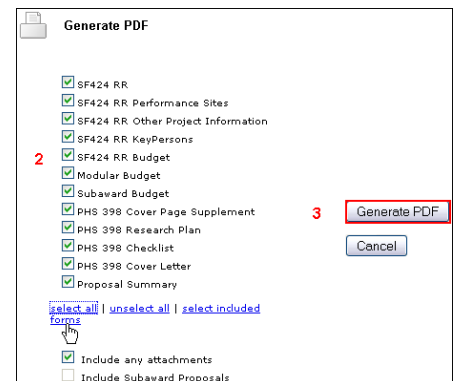
1. Take a properly formatted Research Plan (see the Grants.gov Application Guide SF424 for details) and insert a page break at each section header (e.g. Introduction, Specific Aims, Background & Significance, etc)
2. Create a PDF of the Research Plan using a PDF generator of your choice (e.g. Acrobat, Word 2007, Word OS X, Cute PDF, etc.)
3. Login to CayuseS2S, open your proposal, and navigate to the PHS 398 Research Plan section
4. Upload your Research Plan PDF to “0. Composite PDF”
5. Breaking apart the Research Plan succeeded.



Viewing Proposals in PDF Format

You can generate a PDF to see how your proposal looks at any time

1. Click the **Print** icon  at the top right-hand side of the proposal
2. Check all appropriate sections. You can select as many or as few sections as desired
 - If you want to see the attachments to the form as well, check to **Include any attachments** (see attachment checklist, below).
3. Click **Generate PDF**
 - CayuseS2S will generate a PDF of all selected sections
 - Save or print the generated PDF version



Section 7: Submission

Learning Objectives


- ❖ Discern the proposal submission status
- ❖ Review Grants.gov tracking information
- ❖ View status of a submitted proposal

Note: Remember, only COs/AORs can submit proposals!

Submission Status

Once the submission is complete, a Grants.gov tracking number will be displayed (in blue) along with the date & time of the submission and the submitter's username. To view this information, click on the **Electronic Submission** status icon ⚡, located in the bottom left and upper right corners of the proposal's screen.

- 1.) Grants.gov tracking number
- 2.) Date proposal was received by Grants.gov
- 3.) The message indicating successful receipt by Grants.gov (This does not indicate acceptance of the proposal)

 **Electronic Submission**

⊕ **Opportunity Details**

⊖ **Proposal Submission History**

S2S portal Tracking	Received Date/Time	Submitter	Message
GRANT00553135	2012-02-24 13:37:34 PST	pmcnulty	Successfully received by S2S portal

⊖ **Electronic Submission**

Submission Target

To submit this proposal electronically, press the button below. Please be prepared to wait for the submission to complete before continuing work on this proposal. Your submission will be recorded in the Proposal Submission History above

(Run final validation checks - **recommended**.)

- Your institution will receive a series of emails from Grants.gov and the federal funding agency indicating status.
- Receipt does not mean acceptance. Be vigilant about reviewing the proposal status until you are sure it has been accepted by the agency.

Section 8: Revisions and Resubmissions

Learning Objectives

- ❖ Define the differences and applicability of revisions and resubmissions
- ❖ Routing and submitting a revision
- ❖ How to copy proposal data
- ❖ Identify the steps for transforming a proposal
- ❖ Copy/transform multi-project proposals

Revision

A proposal requiring changes requested either by the applicant or the sponsor to correct errors, budget or scope changes, or to update ancillary documents, prior to a decision being made or an award being issued.

Resubmission

An unfunded application that has been modified following initial review and resubmitted for new consideration. Agencies typically have policies regarding the resubmission of unfunded applications.

To Route and Submit a Revision

Once routed, proposals are locked to further change in Cayuse. To revise a submitted proposal, contact ORAA via an NOI to open the original proposal in Cayuse. ORAA will un-check (retract) the first name in the routing chain to return the proposal to the initiator (and add the Lab Business office if necessary) to start the re-routing. This will help prevent nuisance emails. ORAA will note with the retraction, that this is to revise and re-route the proposal.

The original history of the routing with notes will remain below for history. Updating the existing proposal provides the current and correct information on the summary and all documents needed by CA should the project be funding without creating duplicate entries in Cayuse. Duplicate entries skew the reporting functions.

On the Summary Page:

- Click "change/corrected"
- Update all changed sections on the summary page, budget, dates, etc.
- Place a note indicating this is a revision. For example "This proposal is being revised at the request of the sponsor's to decrease the budget by 10%, 01/01/2001."

On the Documents Tab:


- Leave all existing documents in Cayuse.
- Upload the revised documents – please name uniquely with a new date so it is easily recognized by ORAA.

On the Routing Chain:

- Once retracted and returned to the initiator, edit the chain as necessary for the revisions and start the rerouting.

To Route and Submit a Revision

With Cayuse S2S, you can quickly copy an entire proposal, making it easy to edit the copy for a resubmission. If you plan to resubmit a proposal, Cayuse recommends you make a copy first, and save the original.


Whether you're copying or transforming, both procedures start by clicking the copy/transform icon  on the right side of the proposal. Once you've opened that dialog, follow the instructions below.

To copy a proposal:

- From the initial Copy/Transform Dialog, click the “Copy Proposal” button
- Edit the New Proposal Name.
- Optional: Click to deselect Copy Attachments if you do not want to copy the attached documents.
- Click the “Copy Proposal” button to finish. Your new proposal will now appear in the proposals main list.

You can also transform a proposal from one opportunity to another. For example, you can transform an NIH proposal to a different opportunity posted by the NSF. Also, if Grants.gov has replaced or updated an opportunity while you are working on your proposal, you may have to transform the proposal to the updated opportunity.

To transform a proposal:

- From the initial Copy/Transform Dialog, click the “Transform Proposal” button.
- Select the new opportunity from the list by clicking on the icon to the left. 
- Edit the New Proposal Name.
- Optional: Click to deselect Copy Attachments if you do not want to copy the attached documents.
- Keep or change the Validation Type.
- Click the “Copy (Transform) Proposal” button to finish. Your new proposal will now appear in the proposals main list

Copy/Transform Multi-Project Proposals

Multi-Project Proposals must be Copied/Transformed one component at a time. Selecting Copy/Transform on the Overall Component **will not** Copy/Transform the entire Proposal, just the Overall Component.

Additionally, Components and R01s can be transformed into Components for other Multi-Project Proposals