Desktop Readiness

Module 1

Objectives

In this module you will learn:

- Cayuse S2S's browser requirements.
- Where to obtain detailed instructions on configuring your browser.

Browsers

- Google Chrome is the recommended browser for Cayuse S2S with any operating system.

- Internet Explorer is slower than Chrome, but is an effective browser for the Cayuse S2S application.

Browser Configuration

Here are the main configuration items for your browser:

- **JavaScript Enabled**
- **Cookies Enabled**
- **Pop-ups Allowed**

Visit the Browser Configuration Page for detailed instructions on browser configuration.

Introduction to Cayuse S2S

Module 2

Objectives

In this module you will learn:

- The Features and Benefits of Cayuse S2S
- How to:
  - Sign in
  - Navigate Cayuse S2S
  - Understand the Cayuse S2S Icons
- User Tips

Cayuse S2S Features and Benefits

- Downloads funding opportunities directly from Grants.gov
- Provides autofill and data reuse capability
- Tracks errors and warnings automatically
- Provides electronic routing
- Offers easy navigation between forms
- Stores proposal documents and attachments
- Tracks proposal submission status

Signing in to Cayuse S2S

To sign in to Cayuse S2S:

1. Log into Cayuse S2S

Tabbed Navigation

- **Opportunities Tab**
  - View downloaded opportunities
  - Download new opportunities
  - Create new proposals from downloaded opportunities

- **Proposals Tab**
  - Create or edit a grant proposal
  - Create or edit a subaward proposal
  - Import a subaward proposal

Tabbed Navigation

- **People Tab**
  - Create or edit a professional profile
  - View a professional profile
- **Institutions Tab**
  - View the primary institutional profile
  - View or edit profiles for subcontracting institutions
- **Reports Tab**
  - View proposal, submission, subaward, and award reports

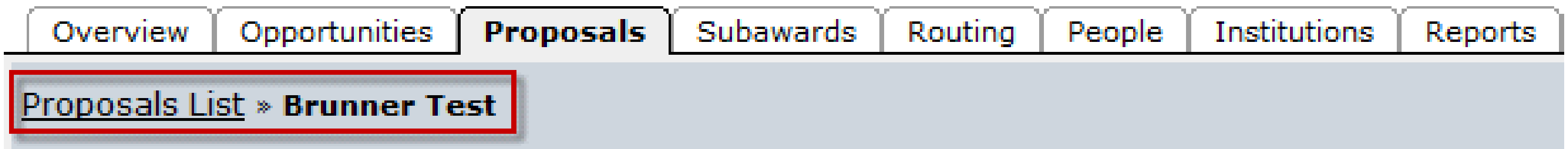
Tabbed Navigation

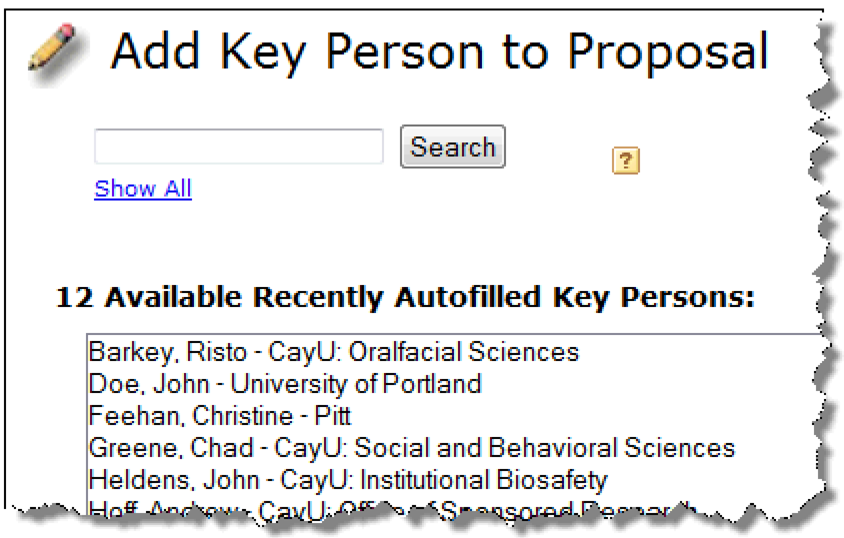
- **Settings Tab**
  - Change your email address

- **Support** link (on the **Overview** tab)
  - Browse comprehensive documentation
  - Check Frequently Asked Questions

Navigation Features

- Quick navigation between screens within a tab using “breadcrumbs”





Icons

- Certain icons are commonly used throughout Cayuse S2S.
- In the application, you can hover your cursor over an icon to see what it does.
  - Entities 
  - Autofill 
  - Information 

Cayuse S2S Tips

- Use the breadcrumbs, not your browser's back function.
- Use the refresh arrows, not your browser's refresh function.
- Exit any pop-up window you open by clicking the link or button to close the window if you decide not to complete the action.
- Be careful when copying and pasting to your proposal.
  - Paste using plain text only.
  - Special characters (e.g., smart quotes, umlauts) will cause errors and rejection.
- Log out of Cayuse S2S when you are finished.

Funding Opportunities

Module 3

Objectives

In this module you will learn:

- What an opportunity is.
- How to determine if an opportunity has already been downloaded into Cayuse S2S.
- How to retrieve opportunities from Grants.gov into Cayuse S2S.
- How to create a proposal using an opportunity.

Opportunities

- An opportunity is a grant application package that includes forms and information to submit to Grants.gov.
- Proposals can be created using an opportunity once the opportunity has been retrieved (downloaded) into Cayuse S2S.
- Before starting your proposal, review the opportunities list to determine if the opportunity has already been retrieved.

The Opportunity List

1. Click the Opportunities tab.

2. Cayuse S2S displays the opportunities that have already been retrieved.
   - Usually, you will only see opportunities that are still open.
   - To show closed opportunities, click the checkbox.

Overview | **Opportunities** | Proposals | Routing | People | Institutions | Reports | Admin

Opportunities Retrieve Opportunities

317 Opportunities / Showing 217 Search Show closed opportunities:

	Opportunity Number	Title	Comp. ID	Agency	CFDA #	Opens	Closes	Retrieved
	PA-C-UC6	G.g AT07 and NIH Ext-UAT Test FOA (UC6)	FORMS-C	National Institutes of Health	93.838	2013-07-22	2018-07-22	2013-12-05
	PA-C-U2R	G.g AT07 and NIH Ext-UAT Test FOA (U2R)	FORMS-C	National Institutes of Health	93.838	2013-07-22	2018-07-22	2013-12-05
	PA-C-TU2	G.g AT07 and NIH Ext-UAT Test FOA (TU2)	FORMS-C	National Institutes of Health	93.838	2013-11-14	2016-11-14	2013-12-05

The Opportunity List

- Search for opportunities using the search box.
- Sort the list by clicking any of the column headings.
- Click the blue info icon to see detailed opportunity information.

Overview | **Opportunities** | Proposals | Routing | People | Institutions | Reports | Admin

Opportunities

Retrieve Opportunities

317 Opportunities / Showing 217

Search

Show closed opportunities:

Opportunity Number	Title	Comp. ID	Agency	CFDA #	Opens	Closes	Retrieved
PA-C-UC6	G.g AT07 and NIH Ext-UAT Test FOA (UC6)	FORMS-C	National Institutes of Health	93.838	2013-07-22	2018-07-22	2013-12-05
PA-C-U2R	G.g AT07 and NIH Ext-UAT Test FOA (U2R)	FORMS-C	National Institutes of Health	93.838	2013-07-22	2018-07-22	2013-12-05
PA-C-TU2	G.g AT07 and NIH Ext-UAT Test FOA (TU2)	FORMS-C	National Institutes of Health	93.838	2013-11-14	2016-11-14	2013-12-05

Finding Opportunities

- If you find the opportunity you are looking for in the list, there is no need to retrieve the opportunity again.

- If you can’t find the opportunity, try retrieving it.

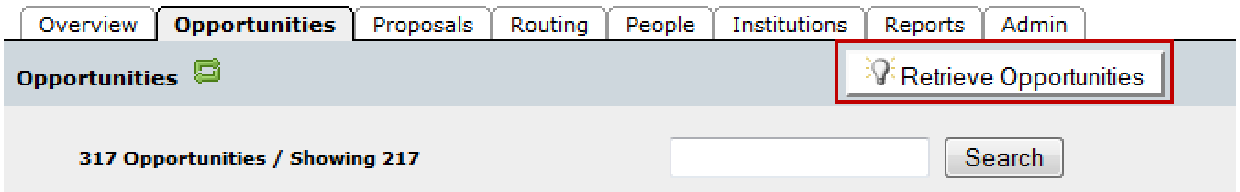
Retrieving an Opportunity

- To retrieve an opportunity from Grants.gov you need the Funding Opportunity Number or CFDA Number.

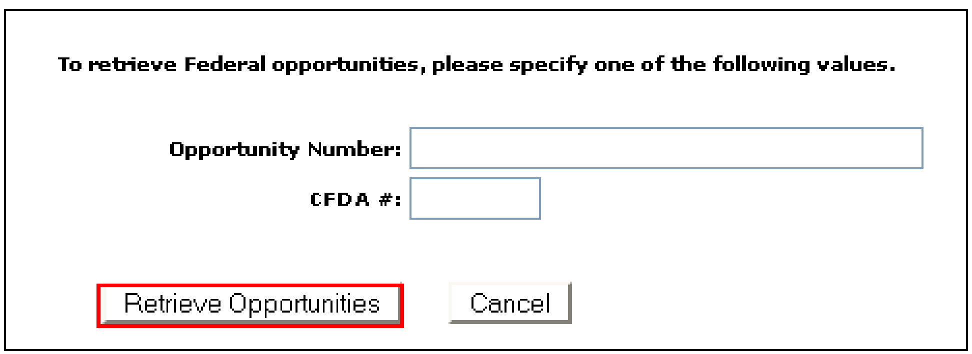
- You can find the Funding Opportunity Number by going to www.grants.gov and using the **Search Grant Opportunities** box or button.

Retrieving an Opportunity

1. In the Opportunities tab, click **Retrieve Opportunities**.



2. Enter the opportunity number or CFDA number into the corresponding field in the pop-up dialog. The opportunity number should be entered exactly as shown on Grants.gov, including any dashes.



3. Click **Retrieve Opportunities**.

Retrieving an Opportunity

- Cayuse S2S will check Grants.gov for an opportunity package.
- If the retrieval is successful, you will see that one or more opportunities were updated.

  – If you don't see the opportunity, you can search for it.

- If no opportunities were updated, verify the number you entered, and check that an application package is available on Grants.gov.
  – Cayuse S2S cannot download anything if a package is not available.

Using Opportunities

- Click the green plus symbol next to the opportunity to create a proposal using that opportunity.

- Refer to the **Proposal Creation** module for more details.

Proposal Creation

Module 4

USC University of Southern California

Objectives

In this module you will learn how to:

- Create a new proposal
- Navigate the proposal
- Assign proposal permissions
- Track proposal history
- Validate the proposal
- Use the proposal lock and break the lock
- Copy and transform proposals

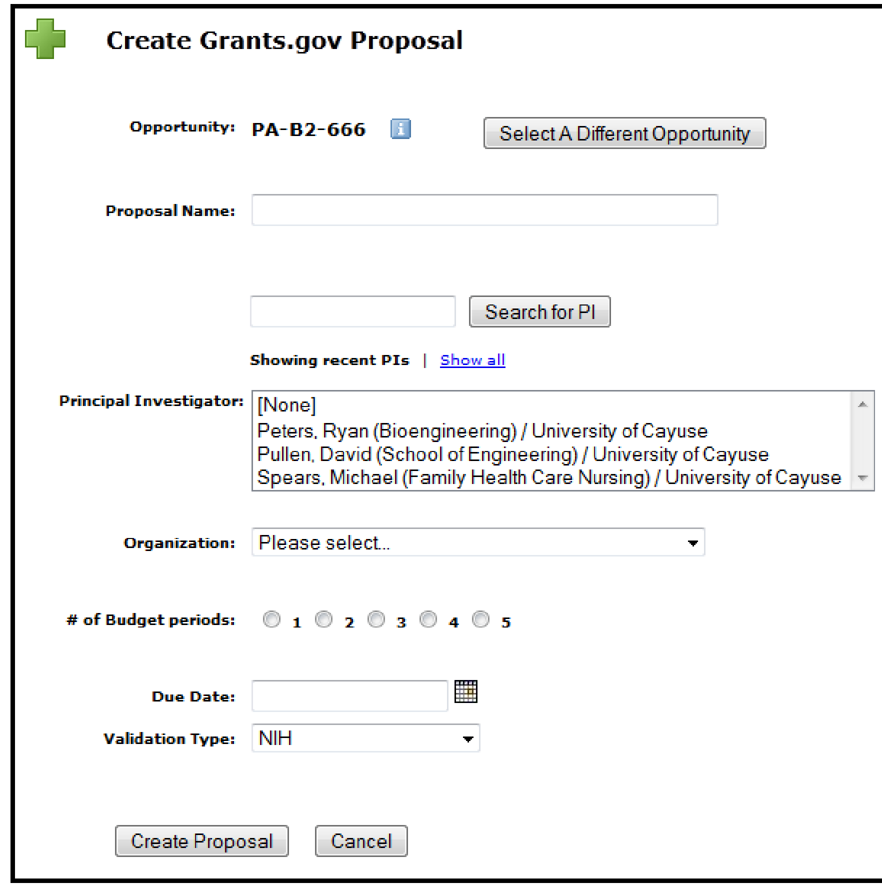
Creating a New Proposal

1. In the opportunities list, click the green plus button next to the opportunity you want to use.

	Opportunity Number	Title	Comp. ID	Agency	CFDA #	Opens	Closes	Retrieved	
	PA-BB-C06	G.g AT07 and NIH Ext-UAT Test FOA (C06)	ADOBE-FORMS-B	National Institutes of Health Stage	93.838	2009-10-05	2012-10-05	2010-02-18	
	PA-BB-D43	G.g AT07 and NIH Ext-UAT Test FOA (D43)	ADOBE-FORMS-B	National Institutes of Health Stage	93.838	2009-12-09	2012-12-09	2010-02-18	
	PA-BB-D71	G.g AT07 and NIH Ext-UAT Test FOA (D71)	ADOBE-FORMS-B	National Institutes of Health Stage	93.838	2009-12-09	2012-12-09	2010-02-18	

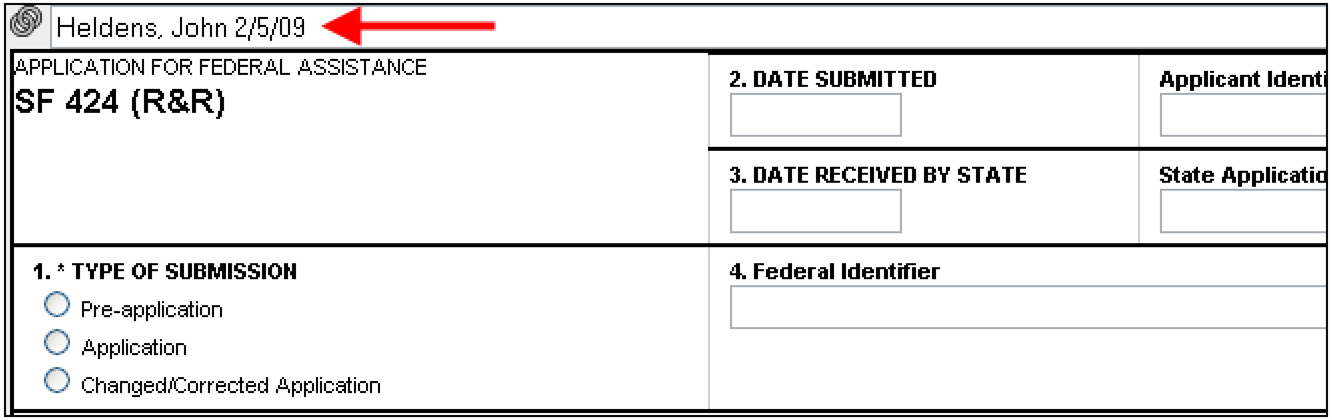
Creating a New Proposal

2. Enter a **Proposal Name**.
3. Select a **Principal Investigator** using the provided list and search.
4. Choose the **# of Budget Periods.**
5. Choose a **Validation Type.**
   – Determines which agency validations will be used.
6. Click **Create Proposal.**
7. Cayuse S2S creates a proposal using the forms required by the opportunity.



Proposal Name

- Enter proposal name in this format:
- Due Date xx/xx/xx_PI Last namePI First Initial_Sponsor Initials_Short Title (first 3characters are funding mechanism if applicable)
- Example: 07/05/14_TrojanT_NIH_R01_Studies on xyz
- You can rename the proposal later by clicking in the name field and entering a new/corrected name.


Heldens, John 2/5/09

APPLICATION FOR FEDERAL ASSISTANCE

SF 424 (R&R)

2. DATE SUBMITTED

Applicant Identi

3. DATE RECEIVED BY STATE

State Applicatio

1. * TYPE OF SUBMISSION

Pre-application

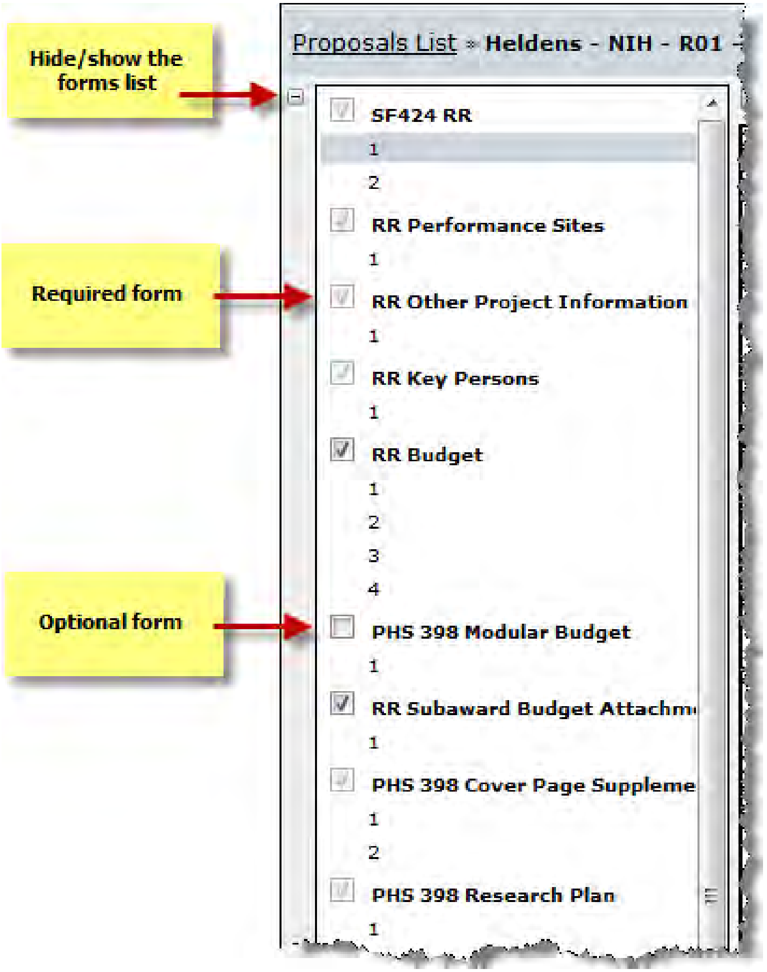
Application

Changed/Corrected Application

4. Federal Identifier

Navigating the Proposal

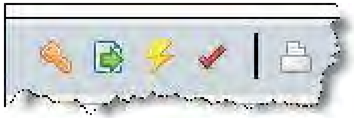
- Forms are listed in the left-side navigation bar.
- Checkboxes control which forms are submitted to the agency.
  - Mandatory forms are automatically checked and cannot be unchecked.
  - Optional forms can be checked to include them in the submission.
- Page numbers take you to each form page.



Navigating the Proposal

The Proposal Management areas have special icons to manage your proposal:

- Upper right corner



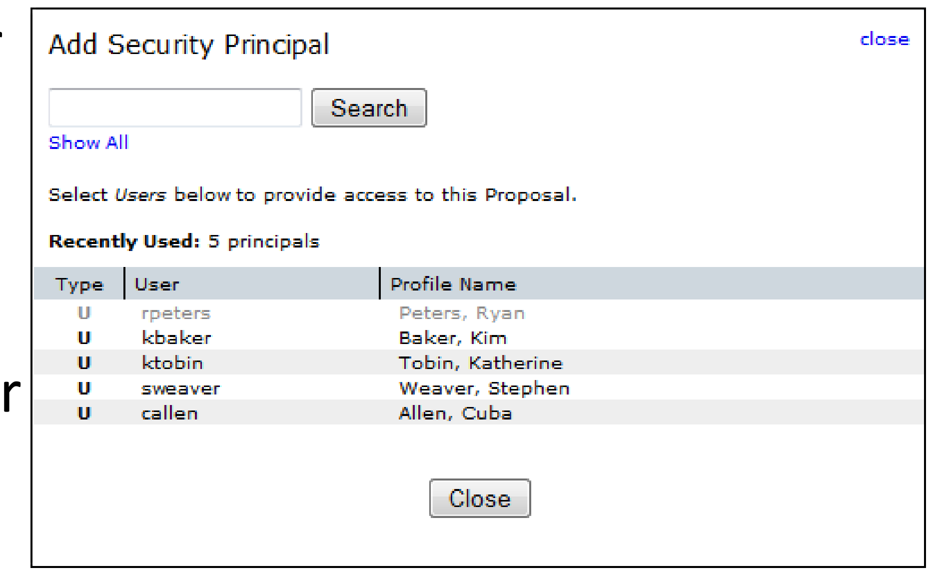
- Lower left sidebar

Proposal Permissions

- Proposal permissions are different from professional profile permissions.
- The proposal creator is given full permissions.
- Proposal permissions must be given to other users who need access to the proposal, such as:
  - Principal Investigators
  - Research Administrators
  - Reviewers

Adding Permissions

1. To give permissions to other Cayuse S2S users, click the **permissions key**:
2. Click **Add user**.
3. Select a user from the list, or search by **first name, last name** or **username**.
4. Click the username in your search results to add the user to the permissions.
5. Click **Close**.



Adding Permissions

- Once the user is added, check or uncheck specific permission(s) as needed:

		List	Read	Write	Attach	Break Lock	Delete	Print	Change Permissions	Add User/Group	Remove User/Group
✖	Heldens, John (jheldens)	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑
✖	Spears, Michael (mspears)	☑	☑	☑	☑	☑	☐	☑	☐	☐	☐

  – Permissions are mostly independent, so be sure to give each user every permission they will need.

Permission Definitions

List	Can see the proposal in lists, but cannot view or modify the details of the proposal.
Read	Can view the details of the proposal.
Write	Can modify all data within the proposal and run Final Review.
Attach	Can attach documents to the proposal.
Break Lock	Can take write access while another user is in the proposal.

Permission Definitions

Delete	Can delete the proposal.
Print	Can print the proposal.
Change Permissions	Can change security permissions for the proposal.
Add/Remove User	Can add or remove other users from the profile permissions.
Submit	Can submit the proposal to Grants.gov.

Proposal History

Proposal History logs include the date and time, username, and a summary for the following actions:

- Create Proposal
- Upload/Delete Attachment
- Save Proposal (includes form changes)
- Approve/Retract Proposal (routing comments are logged)
- Validate Proposal

The Proposal History can be filtered by date and/or exported as a Comma Separated Values (CSV) file.

Proposal History

Proposal History

Show activity from: [ ] to: [ ] Update Date Filter

Show All

Export as CSV

Page: 1 2 3 4 5 (showing results 1 - 30)

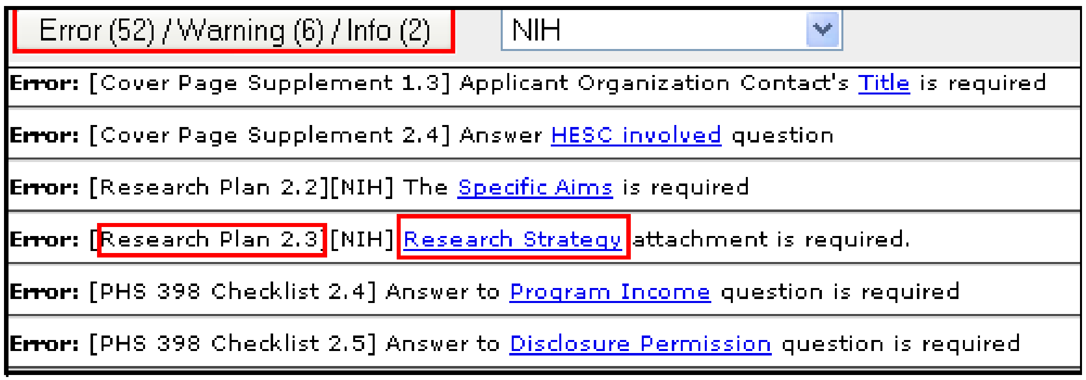
Date/Time:	Username:	Person:	Action:	Summary:
2012-07-19 13:06	cayuseadmin	Cayuse Admin	Save Proposal	
2012-07-19 13:06	cayuseadmin	Cayuse Admin	View Proposal	Opened for edit
2012-07-19 12:05	cayuseadmin	Cayuse Admin	Save Proposal	RR_OtherProjectInfo
2012-07-19 12:04	cayuseadmin	Cayuse Admin	Upload Attachment	RR Other Project Information: MentoringPlan (PDF)
2012-07-19 12:04	cayuseadmin	Cayuse Admin	Save Proposal	RR_OtherProjectInfo
2012-07-19 12:04	cayuseadmin	Cayuse Admin	Upload Attachment	RR Other Project Information: DataManagementPlan (PDF)
2012-07-19 12:04	cayuseadmin	Cayuse Admin	Save Proposal	RR_OtherProjectInfo
2012-07-19 12:04	cayuseadmin	Cayuse Admin	Upload Attachment	RR Other Project Information: Datamanagementplan (PDF)
2012-07-19 12:03	cayuseadmin	Cayuse Admin	Save Proposal	
2012-07-19 12:03	cayuseadmin	Cayuse Admin	View Proposal	Opened for edit
2012-07-19 11:56	cayuseadmin	Cayuse Admin	Save Proposal	RR_OtherProjectInfo
2012-07-19 11:55	cayuseadmin	Cayuse Admin	Delete Attachment	RR Other Project Information: DataManagementPlan

Proposal Validation

- Cayuse S2S keeps a running total of all errors and warnings.
- As you correct errors and warnings, the running total decreases.
- Proposals that are submitted with errors will be rejected by Grants.gov or the granting agency unless your opportunity specifically instructs you to the contrary.
- 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.
- *Proposals should be submitted to DCG with NO Validation Errors.*

Proposal Validation

- Click the **Error/Warning/Info** button at the bottom of the proposal page to display more details.
- If you click the linked text, Cayuse S2S will take you directly to the field that is causing the message to appear.



Proposal Locking

- When you are working in a proposal, other users who can see that proposal will see the lock icon next to it in the Proposals List, followed by your username.
  - This indicates that the proposal is locked and you are working in the proposal.
- Only users with the “Break Lock” permission for the proposal can open the proposal for editing when it is locked by another user.
- Others can open the proposal in read-only mode.
  - They will not be able to enter data or add attachments.

Breaking the Lock

- If you have “break lock” permissions, you can “take the lock” from another user working in the proposal.
  - This will cause them to lose any unsaved data.
  - Contact the user first if possible to ensure they have saved their work.

1. Open the proposal from the list using the read-only icon.
2. Click the lock icon at the top of the proposal.
3. Click OK in the dialog.

Break the proposal lock? Take write-access?

Do you really want to take over the lock for write-access to this proposal, currently held by user "Weaver, Stephen (sweaver)"?

If "Weaver, Stephen (sweaver)" has unsaved changes in another session then taking over the lock will cause those to be lost.

OK Cancel

Copying or Transforming a Proposal

- Copying creates a duplicate copy of an existing proposal.
- Transforming pulls data from an existing proposal into a new proposal for a different opportunity.

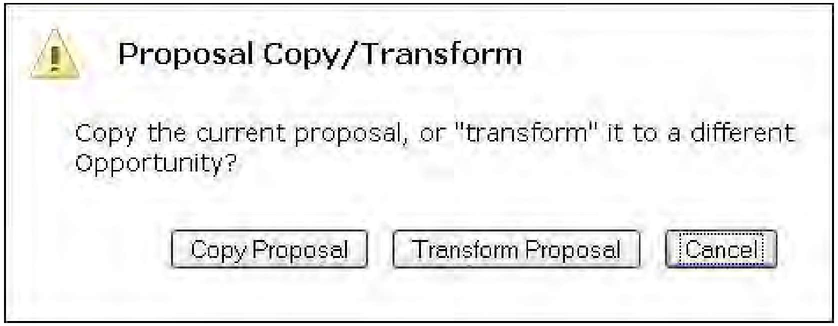
To begin the process:

1. Click on the **Proposals** tab and locate the proposal you would like to copy or transform.
2. Click the **Copy/Transform** icon to the right of the proposal.

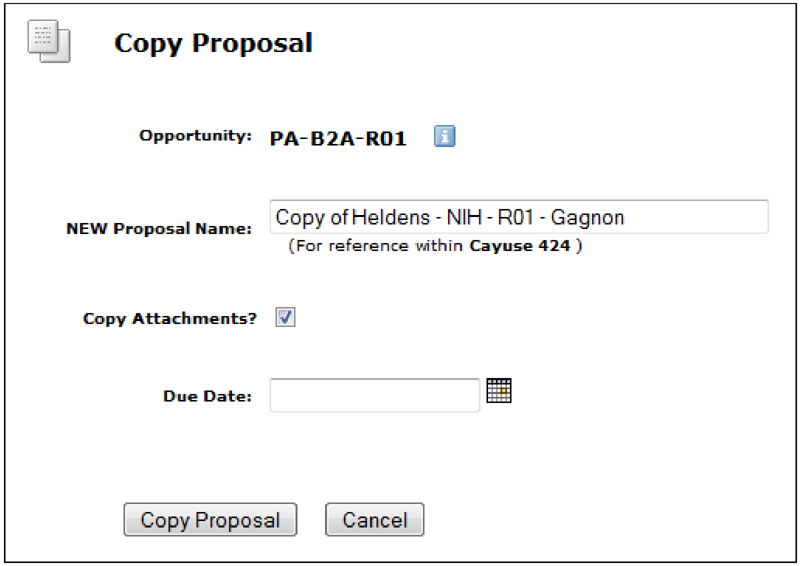
Proposal	Title	PI	Modified	Type	Deadline	
Heldens, John 2/5/09		**Heldens, John**	2008-08-07	Rese...arent R01)		
John's R15	Analysis of Reading Comprehension	**Heldens, John**	2008-08-07	Acad...ward (R15)	2008-03-15	
U of D Subcontract		**Cullina, Matthew**	2008-01-15	Subaward		

Copy Proposal

3. To copy the proposal, click **Copy Proposal** in the dialog.

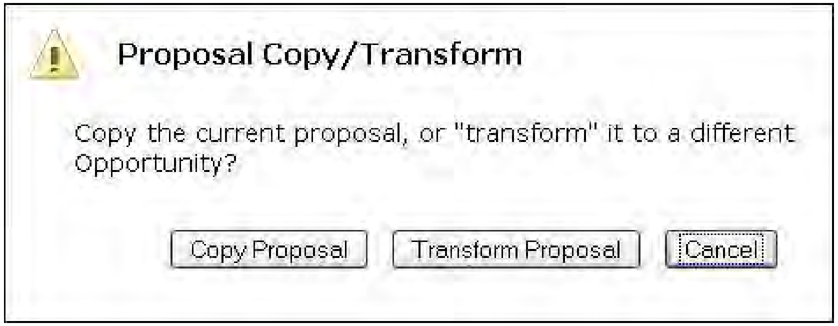


4. Give the proposal a new name and due date.
5. Click **Copy Proposal**.
6. You'll see both the original and the copy in the Proposals List.

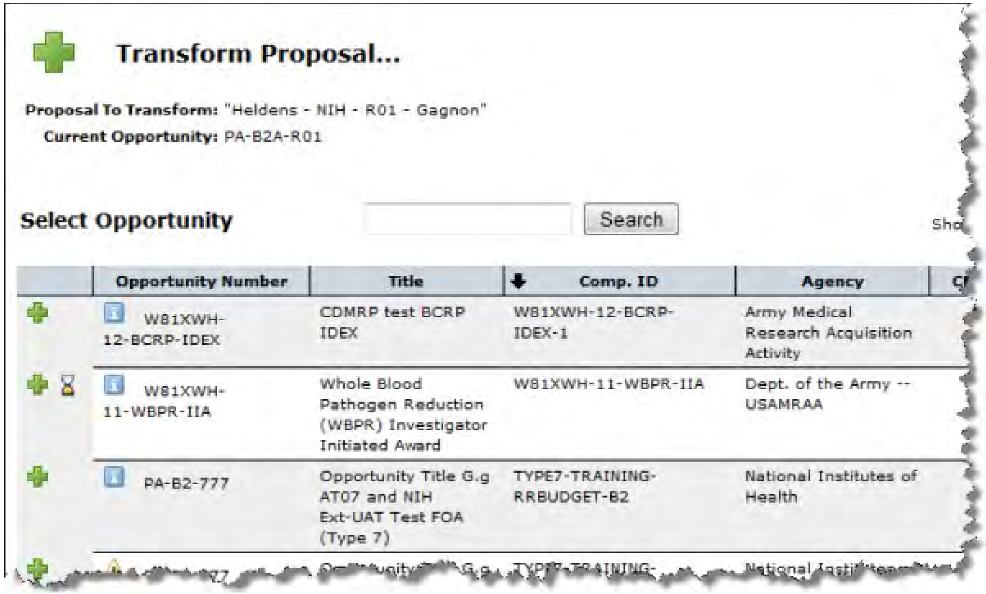


Transform Proposal

3. To transform the proposal, click **Transform Proposal**.



4. Select a new opportunity from the list using the green plus icon.
   – You can search for the new opportunity.

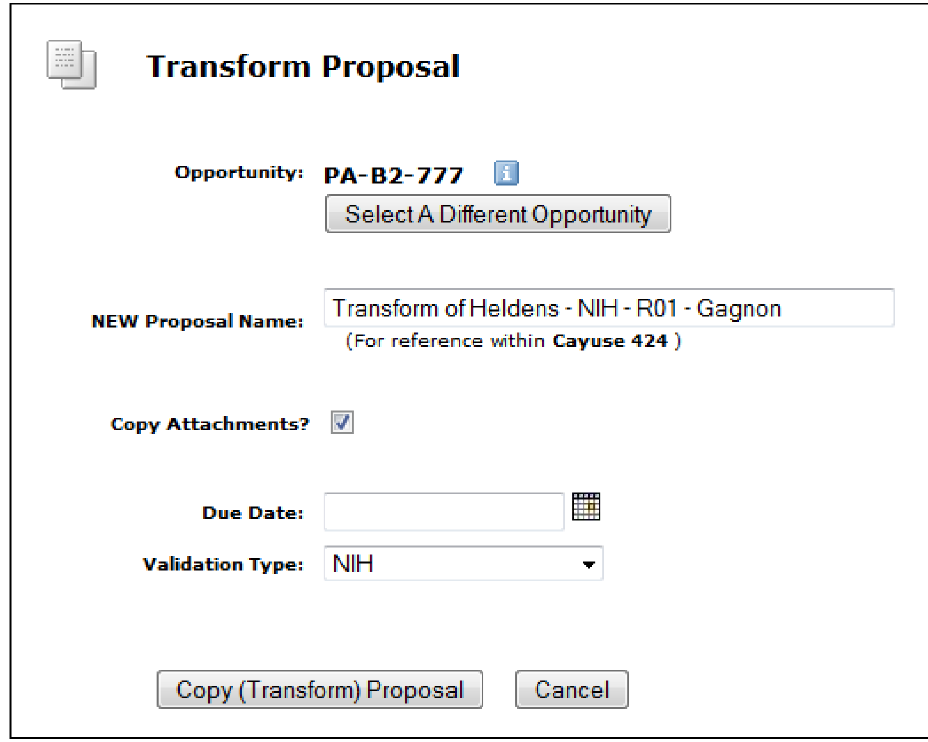


Transform Proposal

5. Give the proposal a new name and due date.

6. Click **Transform Proposal**.

7. You'll see both the original and the transformed proposal in the Proposals List.



The transformed proposal will contain data from any forms that the opportunities have in common.

Developing Your Proposal

Module 5

Objectives

In this module you will learn how to:

- Autofill data into the proposal
- Add Performance Sites
- Add and sort Key Persons
- Attach biosketches

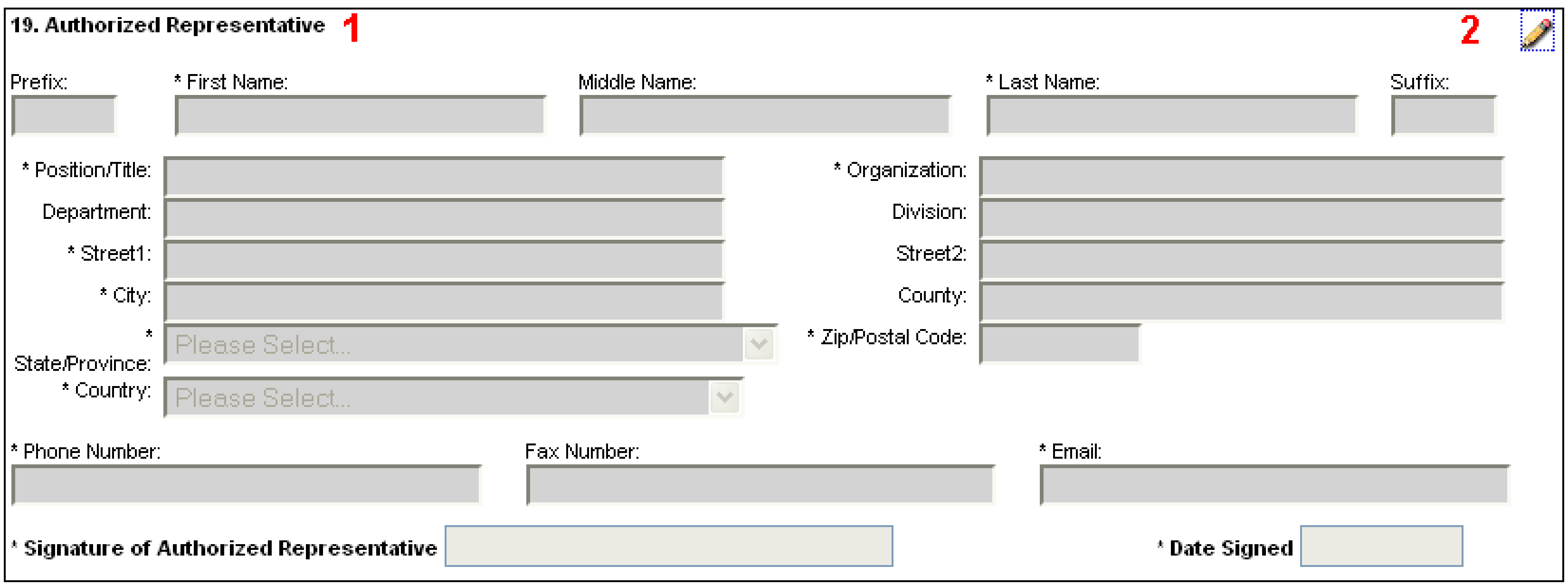
Autofill

- Use the autofill pencil icon to autofill fields.
- Autofilled information comes from professional or institutional profiles.
- If profile information changes during the proposal preparation process, you can re-autofill to import the most recent information using the green refresh arrows.
- When you add a person or institution using autofill, Cayuse S2S also autofills other logically connected fields.
  - Applicant Organization and Principal Investigator data are usually autofilled during proposal creation.

Using Autofill

1. Locate the section of the proposal you would like to autofill (e.g. Authorized Representative – Box 19 on the SF 424 Face Page).

2. Click the autofill pencil:


19. Authorized Representative 1

2

Prefix: * First Name: Middle Name: * Last Name: Suffix:

* Position/Title: * Organization:

Department: Division:

* Street1: Street2:

* City: County:

* State/Province: Please Select... * Zip/Postal Code:

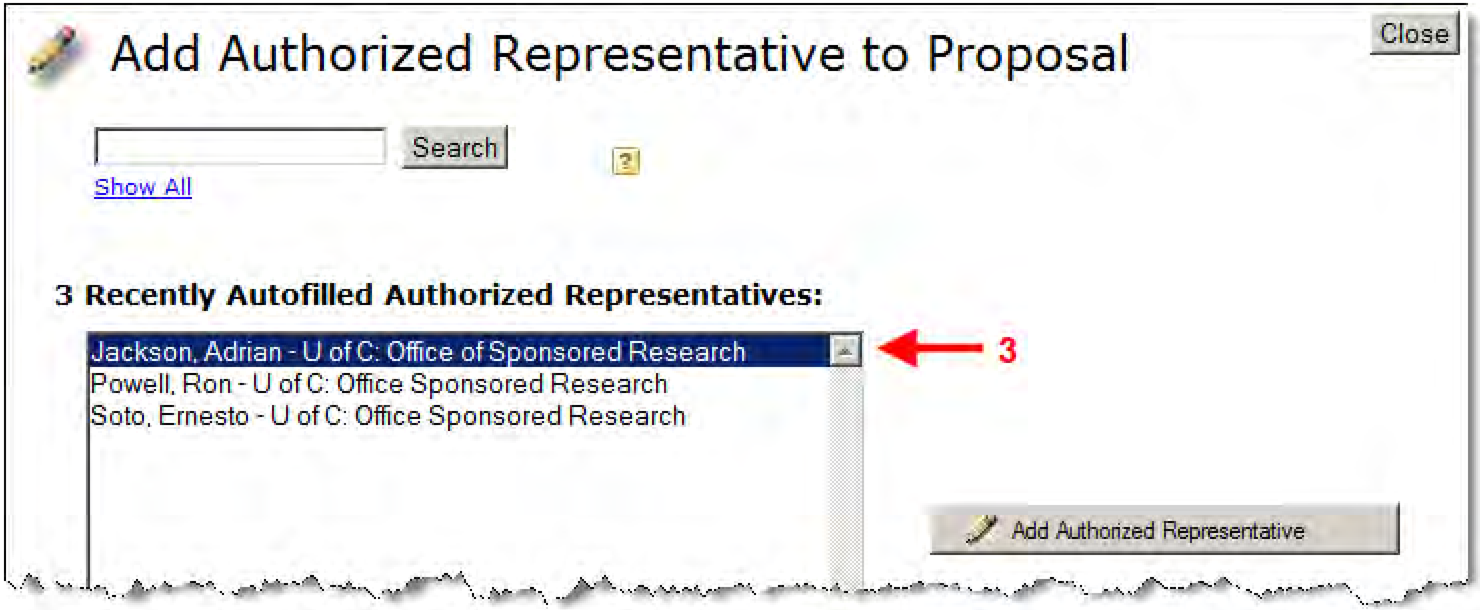
* Country: Please Select...

* Phone Number: Fax Number: * Email:

* Signature of Authorized Representative * Date Signed

Using Autofill

3. Select the person you want to autofill.
   – Use Show All or search if you don't see their name.
4. Click **Add Authorized Representative**.



Using Autofill

5. The person's data is autofilled into Box 19:

19. Authorized Representative

5

Prefix:	* First Name:	Middle Name:	* Last Name:	Suffix:
Mr.	Andrew		Hoff	

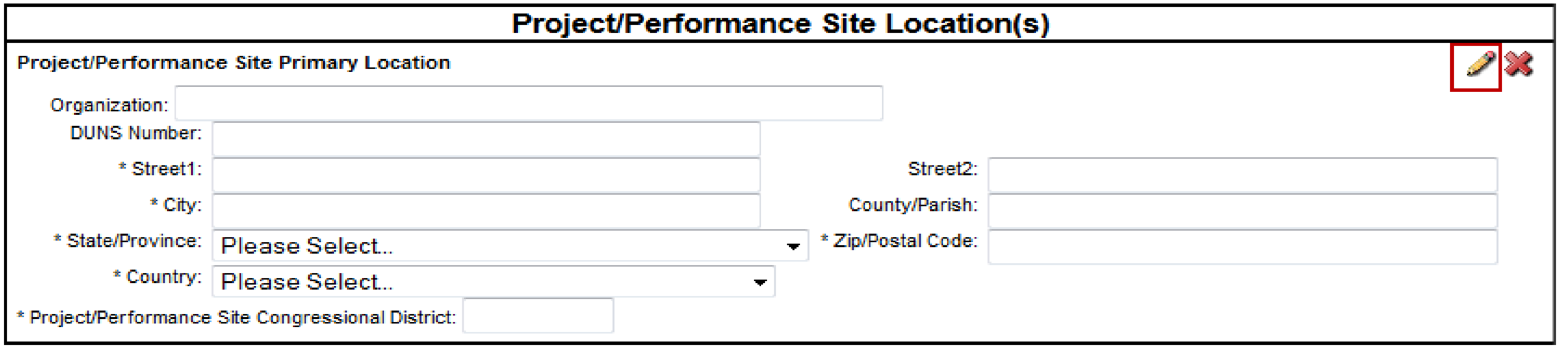
* Position/Title:	Director	* Organization:	University of Cayuse
Department:	Office of Sponsored Research	Division:	Office of Research
* Street1:	10700 SW Beaverton-Hillsdale Hwy.	Street2:	Bldg. II, Ste. 4
* City:	Beaverton	County:	Washington
* State/Province:	Oregon	* Zip/Postal Code:	97005
* Country:	United States of America		

* Phone Number:	Fax Number:	* Email:
503-123-4567	503-765-4321	jcolley@cayuse.com

*** Signature of Authorized Representative** *** Date Signed**

Autofill: Performance Sites

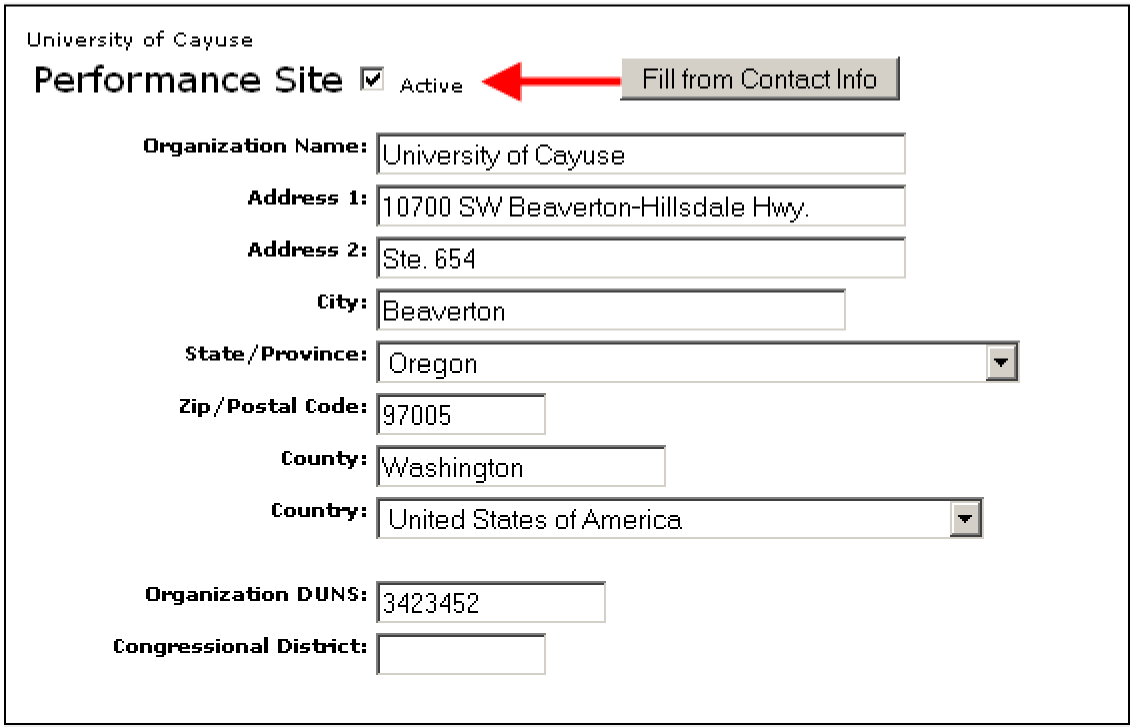
1. Add an existing performance site by selecting the autofill pencil.



2. Select a site from a professional profile:

Autofill: Performance Sites

- If you don’t see a performance site for a key person, make sure their professional profile has performance site information and the site is marked as active:



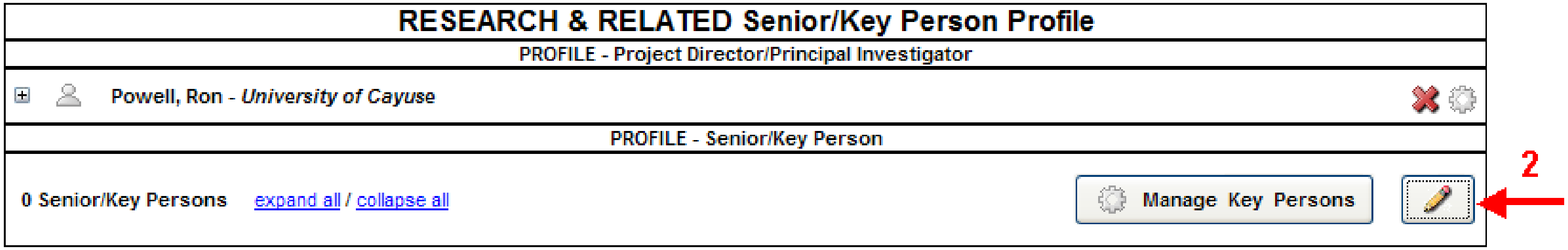
Senior/Key Persons Form

- Add, edit, or autofill Senior/Key Persons
  – Adds Key Personnel on the budget form when they are autofilled into the Key Persons form
- You can add as many Senior/Key Persons as are allowed
  – Cayuse S2S auto-generates an overflow PDF for any key persons beyond the number of slots on the form and attaches it to the proposal.
- Sort button automatically orders the Key Persons list by role and name on the Key Persons form.

Autofill: Senior/Key Persons

1. Navigate to the **Key Persons** form.

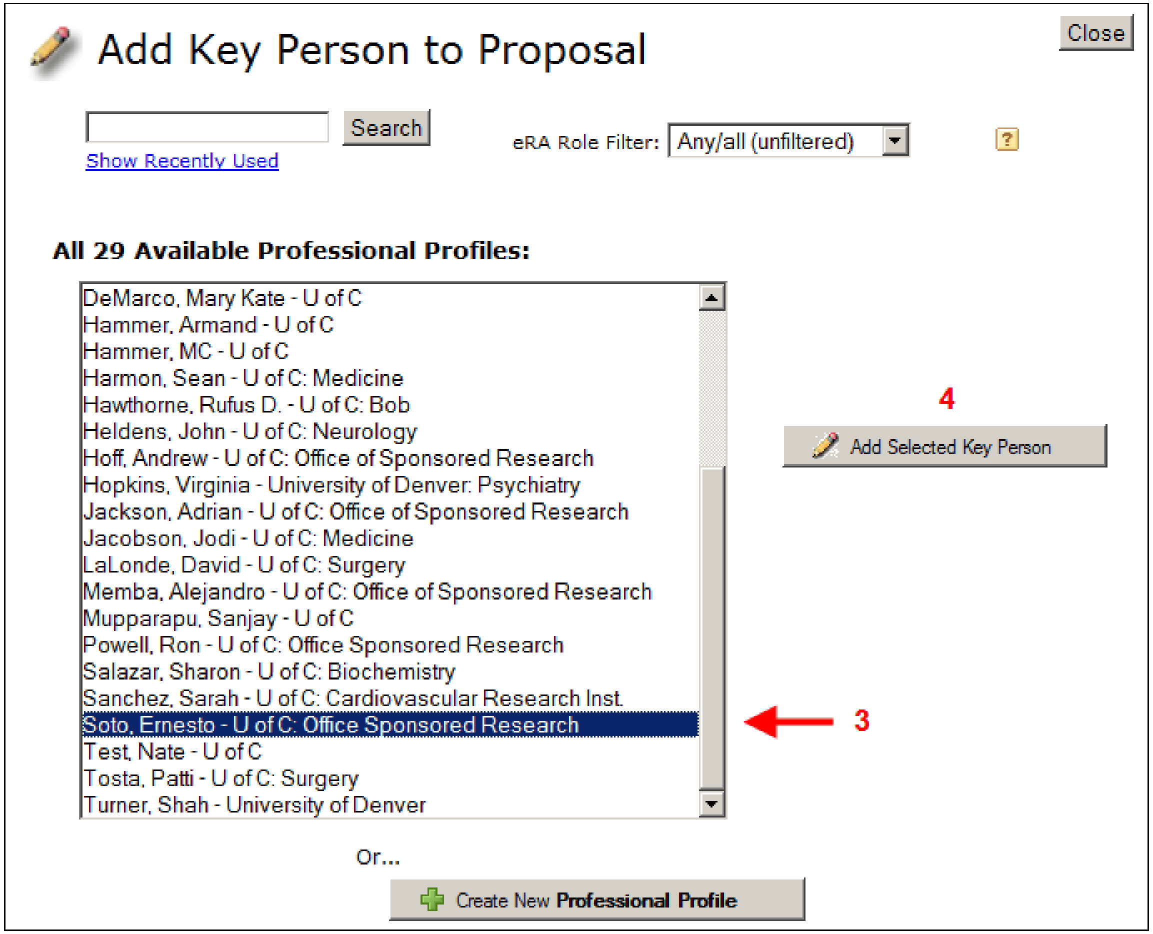
2. Click the autofill icon to add a new person.



Autofill: Senior/Key Persons

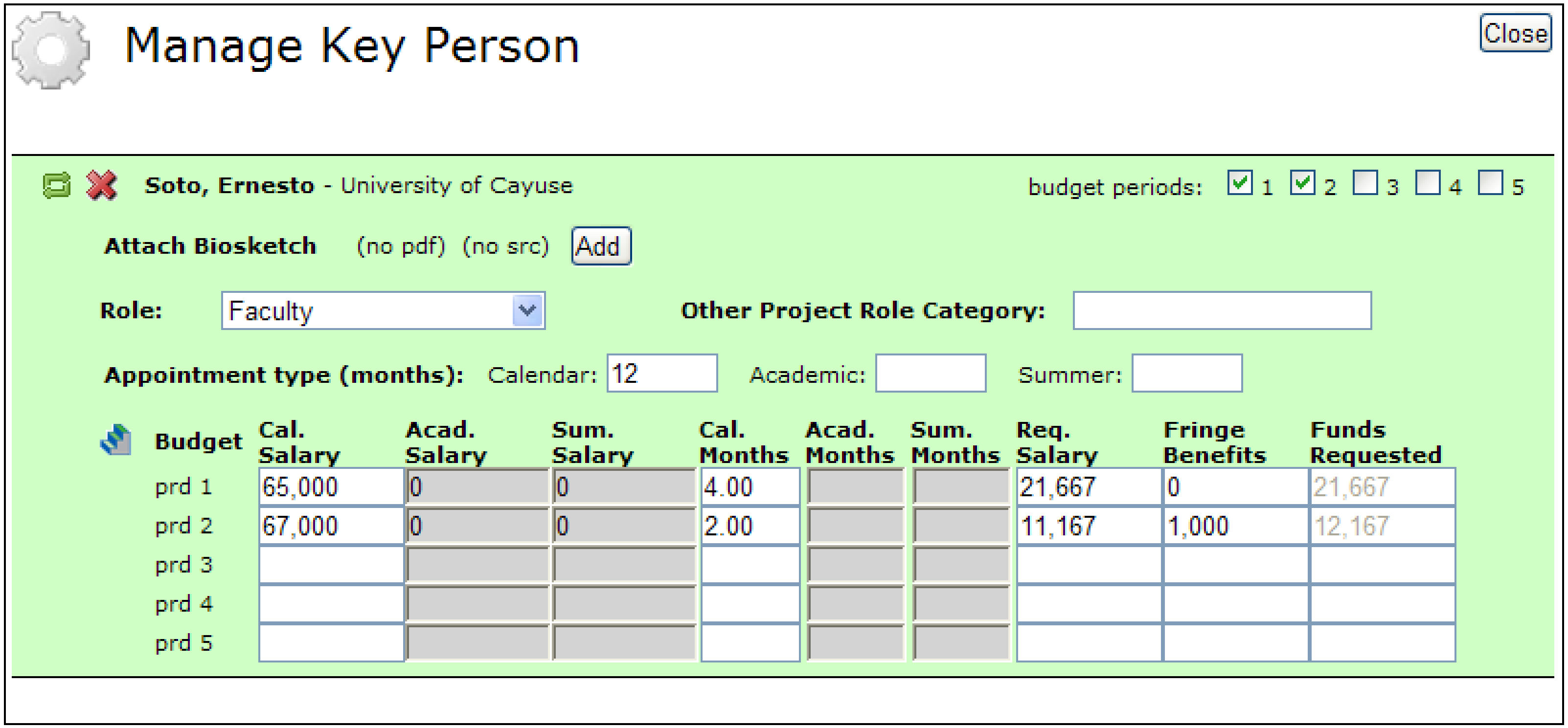
3. Search for or select the person you want to add.

4. Click **Add Selected Key Person**.



Autofill: Senior/Key Persons

5. Key person data can be edited in the Manage Key Person window:



Manage Key Person

Close

Soto, Ernesto - University of Cayuse

budget periods: ☑ 1 ☑ 2 ☐ 3 ☐ 4 ☐ 5

Attach Biosketch (no pdf) (no src) Add

Role: Faculty **Other Project Role Category:**

Appointment type (months): Calendar: 12 Academic: Summer:

Budget	Cal. Salary	Acad. Salary	Sum. Salary	Cal. Months	Acad. Months	Sum. Months	Req. Salary	Fringe Benefits	Funds Requested
prd 1	65,000	0	0	4.00			21,667	0	21,667
prd 2	67,000	0	0	2.00			11,167	1,000	12,167
prd 3									
prd 4									
prd 5									

Autofill: Senior/Key Persons

In the Manage Key Persons window you can:

- Re-autofill from a professional profile.
- Change the Project Role.
- Select budget periods on which the Key Person will be named by checking or un-checking the **Budget Period** boxes.
- Attach biosketches.
- Change effort and salary information.
- Copy salary information across budget periods or automatically escalate it.

Autofill: Senior/Key Persons

- If you enter base salary numbers, fringe rates, and effort months, Cayuse S2S auto-calculates **Requested Salary**, **Fringe Benefits** and **Funds Requested**.

Manage Key Person

Close

Soto, Ernesto - University of Cayuse   budget periods: ☑ 1 ☑ 2 ☐ 3 ☐ 4 ☐ 5

Attach Biosketch (no pdf) (no src) Add

Role: Faculty   **Other Project Role Category:**

Appointment type (months): Calendar: 12   Academic: Summer:

Budget	Cal. Salary	Acad. Salary	Sum. Salary	Cal. Months	Acad. Months	Sum. Months	Req. Salary	Fringe Benefits	Funds Requested
prd 1	65,000	0	0	4.00			21,667	0	21,667
prd 2	67,000	0	0	2.00			11,167	1,000	12,167
prd 3									
prd 4									
prd 5									

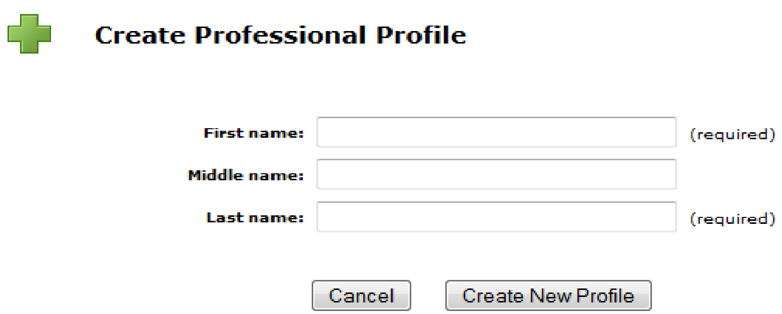
Adding Senior/Key Persons “On the Fly”

Adding a Senior/Key Person “on the fly” allows you to quickly create a Professional Profile from within the proposal.

1. From the **Key Persons** form (or the Key Persons section of the detailed budget form), click the autofill pencil .

2. Click the **Create New Professional Profile** button in the Add Key Person window:

3. Enter the first and last names and click the **Create New Profile** button:



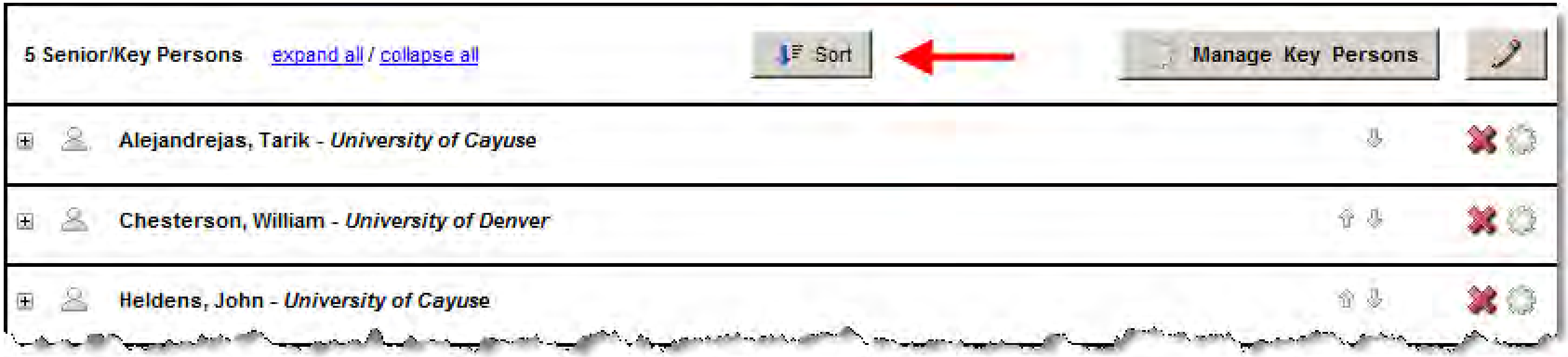
Adding Senior/Key Persons "On the Fly"

4. Fill out the **Create New Key Person** form and click the **Save Key Person** button.

5. A professional profile will be created and the person will be added to the Senior/Key Persons form and the budget form.

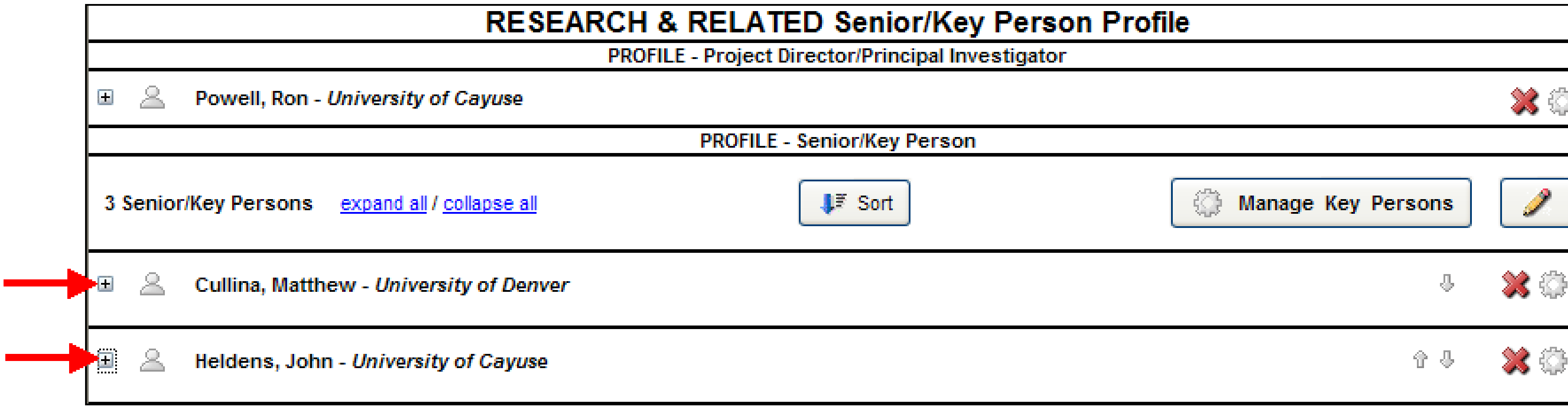
Sorting Senior/Key Persons

- Once you have added all key persons, click the **Sort** button to order your list.
  - PD/PI roles will appear first.
  - OSC roles will appear last.
  - Other people will be in alphabetical order.

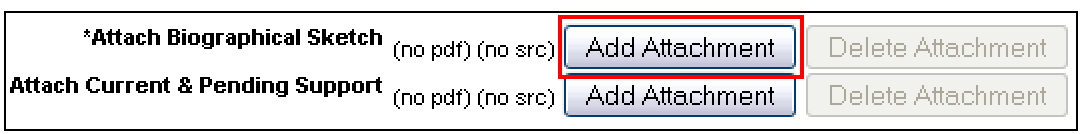


Attaching Biosketches

1. Expand the key person's listing by clicking on the plus sign:



2. Click **Add Attachment** next to Attach Biographical Sketch:

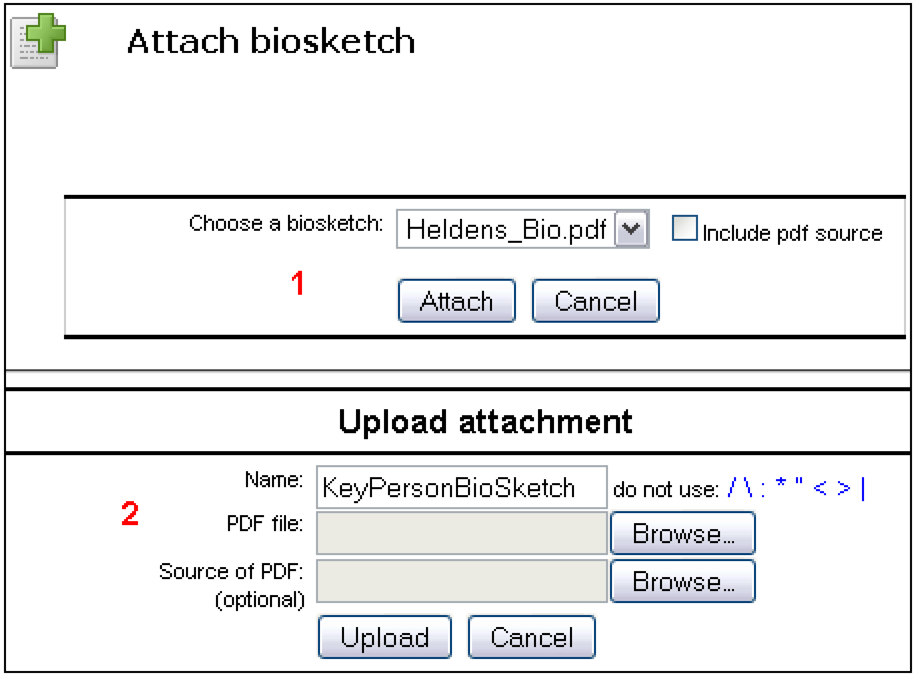


Attaching Biosketches to the Proposal

3. From the **Attach Biosketch** window, you can attach the PDF and the Source (Word) file from:

- The professional profile (top)

- A file on your local computer (bottom)



Proposal Budgets

Module 6

Objectives

In this module you will learn:

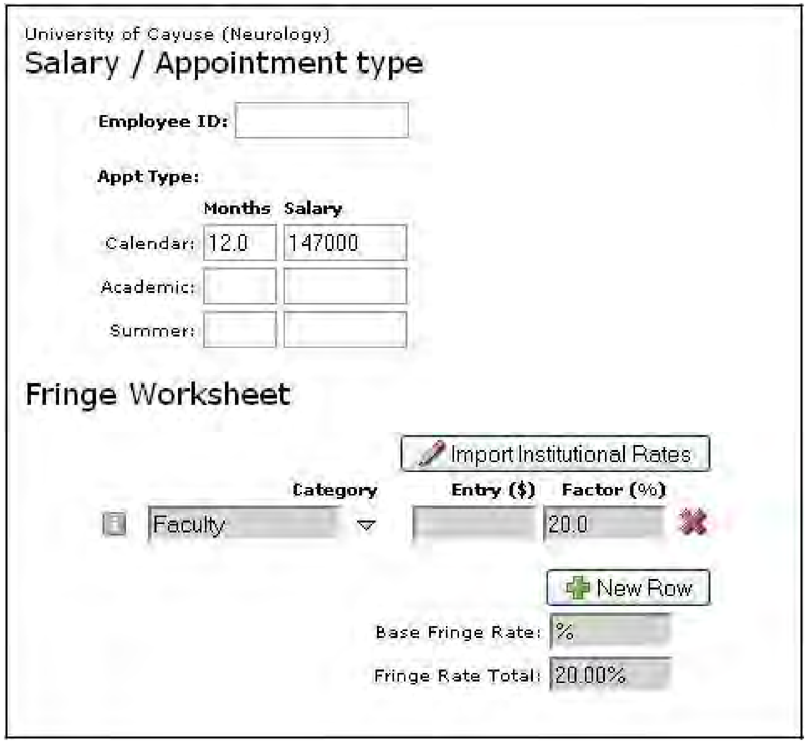
- Basic budget concepts that apply to all types of budgets
- How to use Cayuse S2S to create a:
  - Detailed budget
  - Modular budget
  - Subaward budget

Basic Budget Concepts

- Senior/Key Persons information, including salary, appointment type, and fringe rate amount, is autofilled from professional profiles when available.
- Automatic budget calculations are made once salary, effort, and other amounts are specified.
- Users can override autofilled or calculated data in most fields.
- Cost replication and escalation for all budget categories on multiple budget periods is quick and easy with Replicate/Escalate.

Key Person Budget Information

- Salary and fringe information for PIs and Senior/Key Persons can be added to the professional profile.
- Enter the appointment months and the corresponding salary based on appointment type.
- Select fringe rates from the institutional profile, or enter individual Fringe manually.
  - Use Add New Row for additional rates.



Key Person Budget Information

- When adding Key Persons to the proposal, their appointment and salary data will be included.
- Use Manage Key Persons to indicate appropriate effort:

Appointment type (months): Calendar: Academic: 9.0 Summer: 3.0

Budget	Cal. Salary	Acad. Salary	Sum. Salary	Cal. Months	Acad. Months	Sum. Months	Req. Salary	Fringe Benefits	Funds Requested
prd 1	0	90,000	30,000		1.000	0.500	15,000	9,000	24,000
prd 2	0	90,000	30,000		1.500	0.500	20,000	12,000	32,000
prd 3	0	90,000	30,000		1.000	0.500	15,000	9,000	24,000

- You can manually change autofilled or calculated information in Manage Key Persons or on the budget:

A. Senior/Key Persons in Budget Period 1 of 5

Manage Key Persons

Pref.	First Name	Mid. Name	Last Name	Suf.	Project Role	Base Salary ($)	Cal. Salary ($)	Acad. Salary ($)	Sum. Salary ($)	Cal. Mons	Acad. Mons	Sum. Mons	Requested Salary ($)	Fringe Benefits ($)	Funds Req. ($)
Dr.	John		Helden:	PhD	PD/PI	147,000	147,000	0	0	3.00			38,900 *	7,780	46,680
Dr.	Sarah		Sanche	PhD	Faculty	150,000	150,000	0	0	2.00			25,000	5,000	30,000
Dr.	Michael		Spears	PhD	Faculty	135,000	135,000	0	0	5.50			61,875	12,375	74,250

Key Person Budget Information

- If you override a calculated field, the system will insert a red star adjacent to the field.
- Once a field has been overwritten, the calculated value will no longer show in that field.
  - Delete the entered value and click out of the field to see the calculated value again.

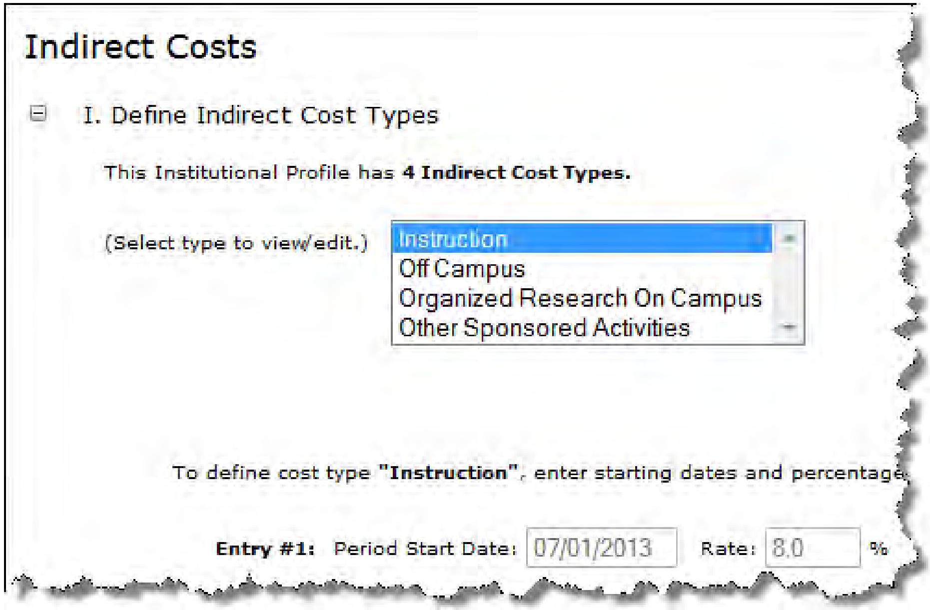
A. Senior/Key Persons in Budget Period 1 of 5

Manage Key Persons

Pref.	First Name	Mid. Name	Last Name	Suf.	Project Role	Base Salary ($)	Cal. Salary ($)	Acad. Salary ($)	Sum. Salary ($)	Cal. Mons	Acad. Mons	Sum. Mons	Requested Salary ($)	Fringe Benefits ($)	Funds Req. ($)
Dr.	John		Heldens	PhD	PD/PI	147,000	147,000	0	0	3.00			38,900 ★	7,780	46,680
Dr.	Sarah		Sanche	PhD	Faculty	150,000	150,000	0	0	2.00			25,000	5,000	30,000
Dr.	Michael		Spears	PhD	Faculty	135,000	135,000	0	0	5.50			61,875	12,375	74,250

Budget Components: Indirect Costs

- Indirect Cost types and rates are stored in the institutional profile:



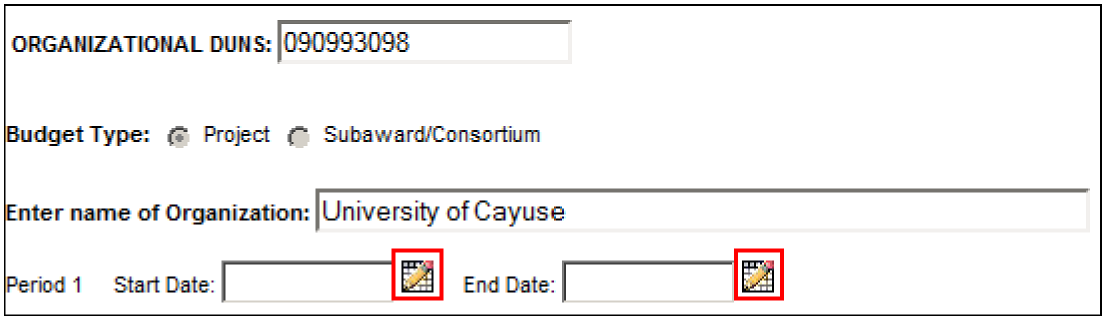
- If the organization you selected for the proposal has indirect cost types, those will be available to you for selection when you are creating your budget.

Budget Components: Budget Periods

- Cayuse S2S supports up to ten budget periods.
  - The maximum available for an opportunity is dependent on the form included in the opportunity.
- The number of Budget Periods can be changed after the proposal is created.
- When working with multiple budget periods, it is important to enter or select the correct data for all budget periods.

Managing Budget Periods

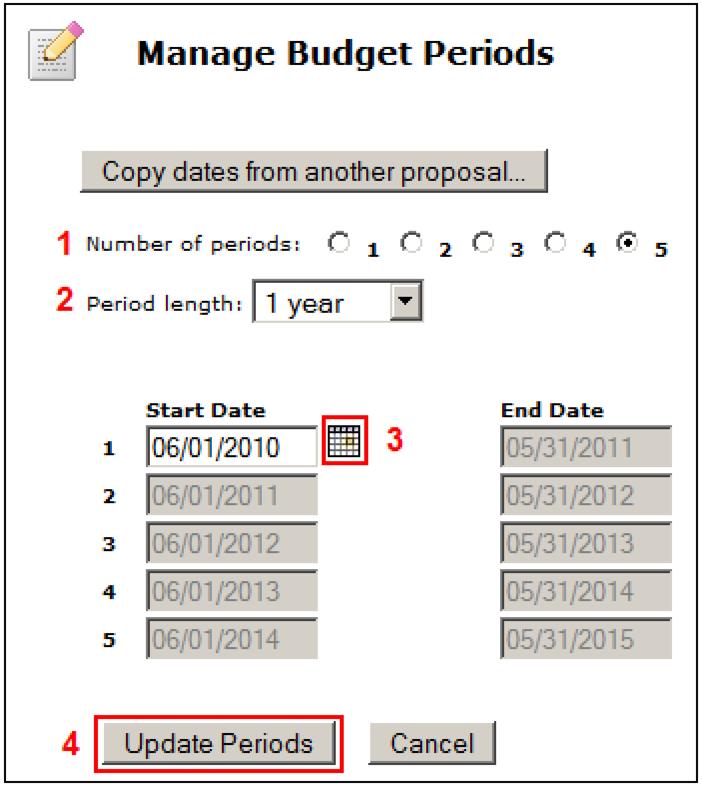
- Click on a calendar icon to manage the budget periods:



- You can select your project dates in several places:
  - Detailed budget form
  - Modular budget form
  - SF424 R&R Page 1

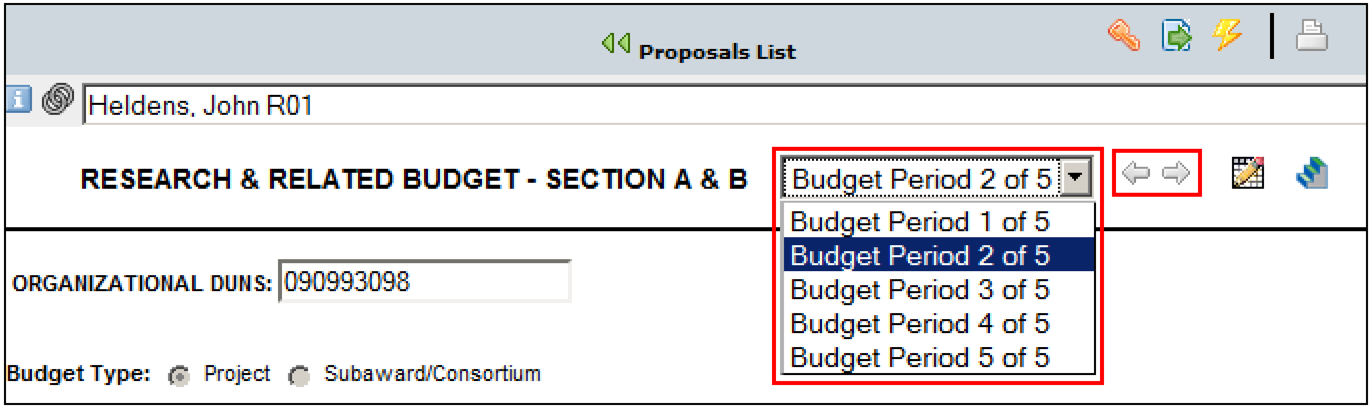
Managing Budget Periods

1. You can change the number of budget periods if necessary.
2. Select the **Period Length** using the drop-down menu. **Custom** is available for unusual budget period lengths.
3. Click on the calendar icon to select a date.
4. Click the **Update Periods** button to update the proposal.



Managing Budget Periods

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



Section B: Other Personnel

Manually enter:

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

B. Other Personnel

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

Cayuse S2S automatically calculates the Funds Requested value.

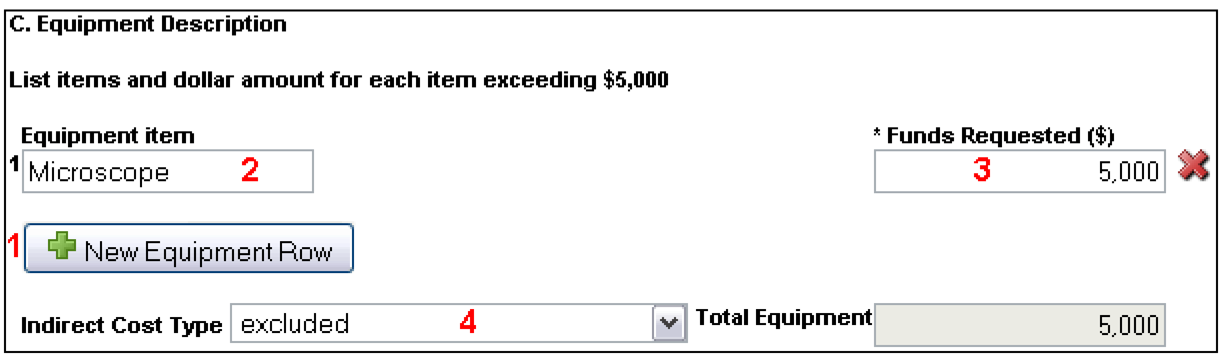
Section B: Adding Other Personnel

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

  - The default indirect cost type for this section (if one is defined in the institutional profile) is autofilled during proposal creation.
  - This selection is necessary to calculate the budget totals.

Section C: Equipment

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



Sections D, E, F and J : Additional Funds

1. Select the correct **Indirect Cost Type** using the drop-down menu.
   – The default indirect cost type for this section (if one is defined in the institutional profile) is autofilled during proposal creation.

2. Enter **Funds Requested ($)** for each applicable line item.

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

Section H: Indirect Costs

Select any additional **Indirect Cost Types** in the proposal using the drop-down menu.

- The default indirect cost type selecting during proposal creation is autofilled here.

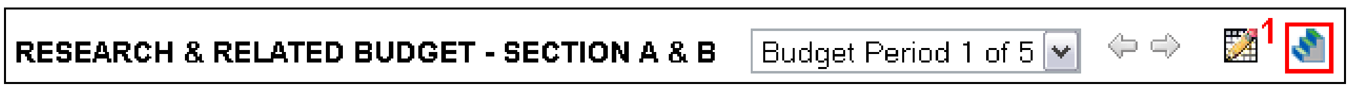
When an indirect cost type is selected:

- The indirect cost rate and base will be filled in.
  - This may be a composite rate if the IDC rate is escalating.
- Funds Requested ($) will update.
- The values will be included in the cumulative budget calculations.

Replicating Budget Data

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

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



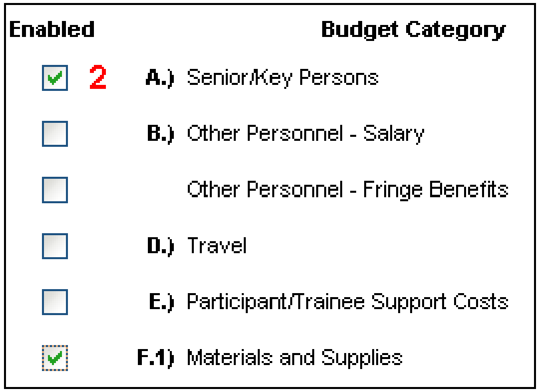
Replicating Budget Data

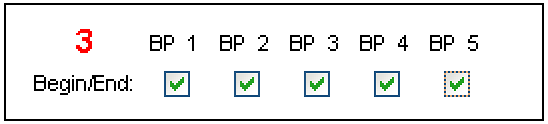
2. Check the box next to the budget category or categories you want to replicate.

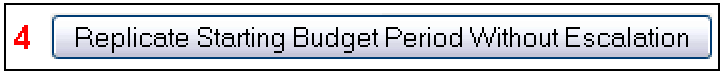
3. Select the budget period(s) you want to include that data.

4. Click **Replicate Starting Budget Period Without Escalation**.

   – The first period numbers for the selected category replicate into the budget periods you chose.



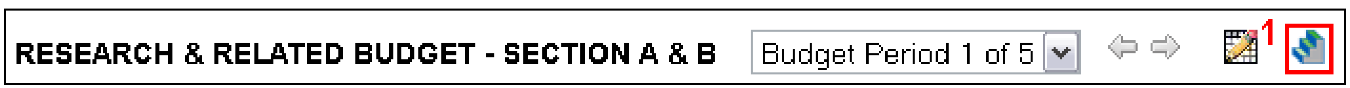




Escalating Budget Data

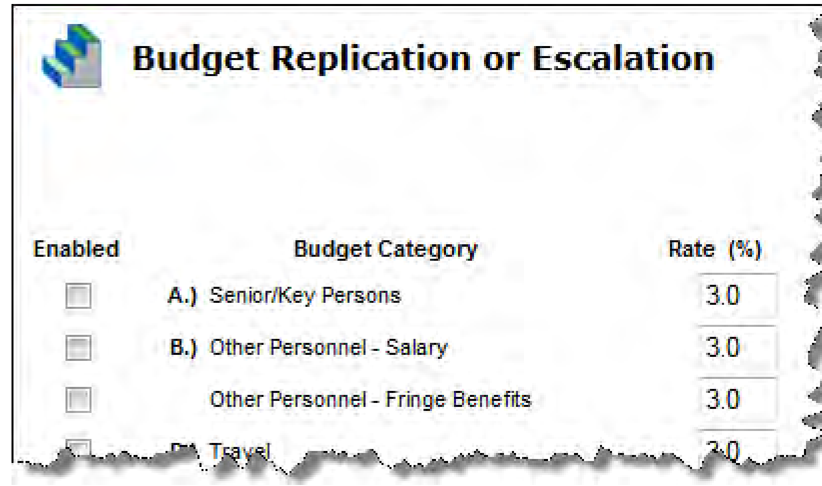
- Escalation is like replication, but uses a percentage increase per budget period.
- The procedure is similar to data replication.

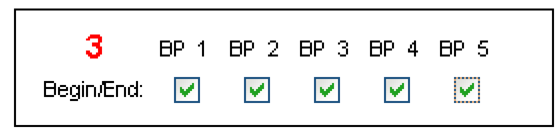
1. Click on the **SF424 RR Budget** page

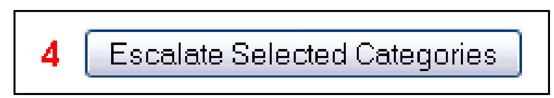


Escalating Budget Data

2. Check the box next to the budget category or categories you want to escalate.
   - If necessary, change the rate to what you want.
3. Select the budget periods that you want to escalate to.
4. Click **Escalate Selected Categories**.
   - The first period numbers for the selected category escalate into the budget periods you chose.







The Cumulative Budget Page

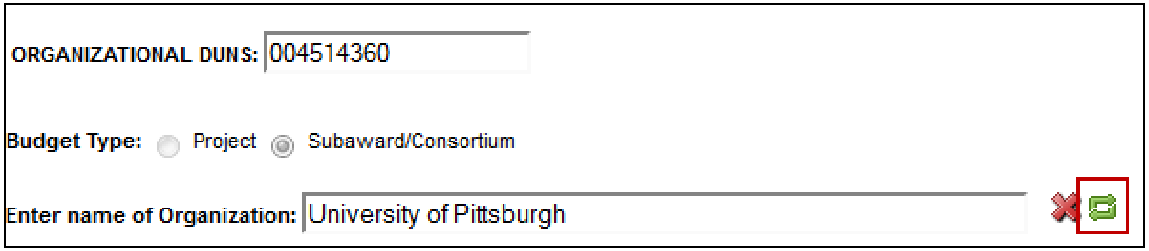
- The **Cumulative Budget** page displays totals for all categories and expenditures indicated in the detailed budget pages.
- Cumulative budget totals are calculated by the system and cannot be overridden.
  - If you find an error, correct it on the source page and the cumulative budget number will automatically be updated.

The Modular Budget

- Creating the detailed budget in Cayuse S2S will automatically create a modular budget and round up to the nearest module.
  - We recommend using this method to create a modular budget.
- You can also enter modular budget figures directly into the Modular Budget page.
- If you are submitting a modular budget, you cannot submit subawards as well. Use the Worksheet Rows function described to help with your calculations.

The Subaward Budget

- The Subaward Budget form behaves exactly like the detailed budget form, including getting Key Person information from the Key Persons form.
- The most common budget issue in subawards is missing indirect cost types.
  - If you can’t select different indirect cost types, the subaward organization probably does not have them.
    - You’ll need to fill out DCG Institutional Profile Request Form to update an existing subaward organization’s institutional profile with the additional indirect cost types.
  - After they are added, use the green arrows to re-autofill the organization.



Attaching Documents

Module 7

Objectives

In this module you will learn how to:

- Attach documents to your grant proposal
- Follow Grants.gov and NIH attachment guidelines
- Attach your Research Plan using the “Exploder”
- Attach Letters of Support
- View proposal forms and attachments in PDF format

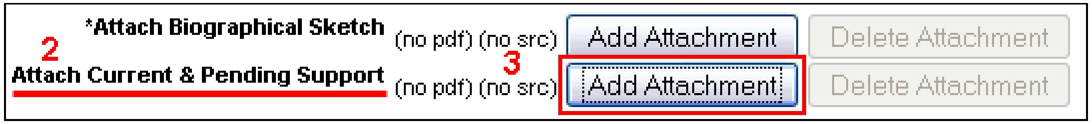
Commonly Required Attachments

- PHS 398 attachments for NIH and other PHS agencies only

Form Set	Attachment
SF424 RR, page 2	• Pre-application • List of Project Congressional Districts • Cover Letter
SF424 RR, Other Project Information	• Project Summary/Abstract • Project Narrative • Bibliography and References Cited • Facilities and Other Resources • Equipment • Other
SF424 RR, Key Persons	• Biographical Sketch • Current and Pending Support
SF424 RR Budget, page 3	• Budget Justification
Modular Budget	• Budget Justification
PHS 398 Research Plan	• Research Plan

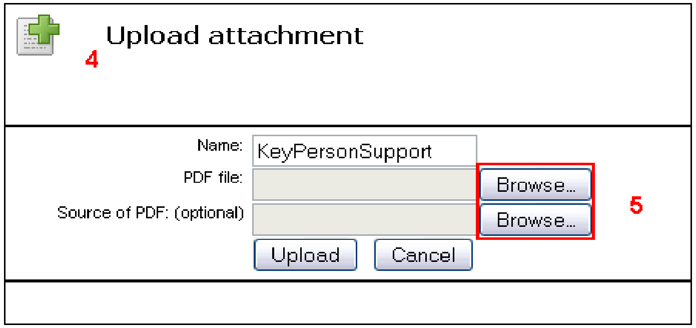
Attaching Documents

1. Locate the appropriate page of the form you need to attach the document to.
2. Locate the attachment point by the label. Current & Pending Support is shown below.
3. Click **Add Attachment**.



Attaching Documents

4. In the **Upload Attachment** popup, click **Browse** next to the **PDF file** slot.

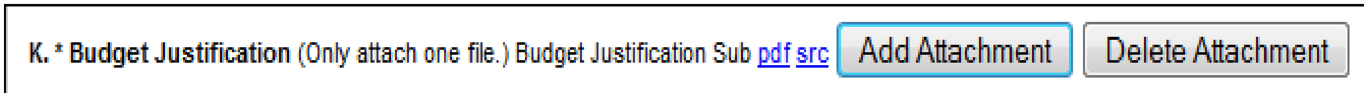


5. Select the PDF file in the file browser and click **Open**.
   - PDF is required and will be submitted to Grants.gov.
   - Cayuse S2S cannot submit non-PDF files.
6. If desired, do the same for the Source file (e.g. Word format).
   - Source file is not required, but makes it easy to change the file if modifications are needed.

Attaching Documents

7. Once you've added the desired file(s), click **Upload**.

8. The files have been uploaded when **PDF** (and **SRC** if you included a source file) are blue links.



PDF Attachment Guidelines

Grants.gov and NIH both maintain guidelines on successfully submitting PDF attachments.

- Convert ‘active’ form field PDFs to ‘flat’ (static) PDFs using a PDF converter.
- Names should be less than 50 characters.
- Create PDFs using creation software, not by scanning a printed document.
- Disable any security features in the document.
- Do not include stamps or annotations.
- Make sure your page size is 8.5” x 11” letter (do not use A4).

These guidelines apply to most opportunities, but always verify your FOA instructions if you have any questions.

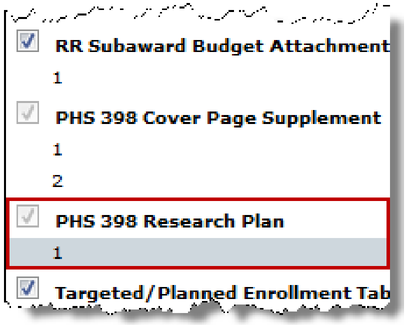
Attaching the Research Plan

The Research Plan can be attached manually using the previous steps, but Cayuse S2S also allows you to upload just one document and get all your attachments in the right place!

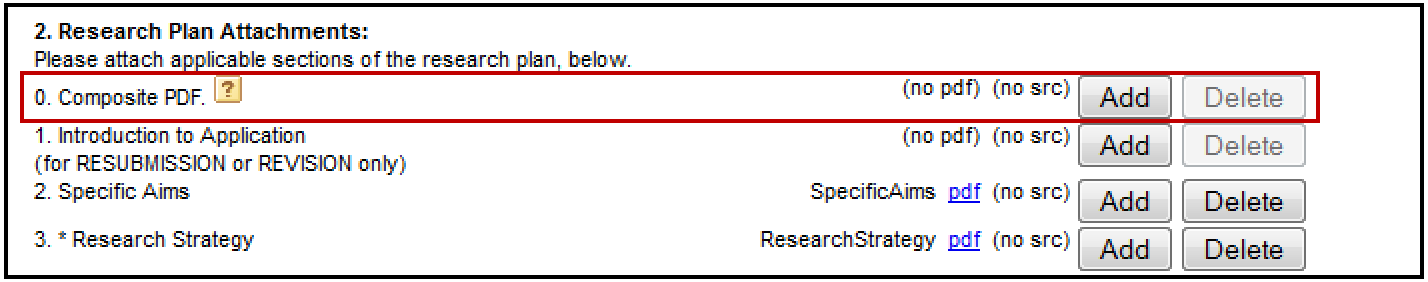
1. Create a properly formatted Research Plan.
   - See the SF 424 R&R Application Guide for NIH for details.
2. Insert a page break at each section header (e.g. Introduction, Specific Aims).
3. Create a PDF of your Research Plan file using the PDF creation software of your choice.

Using the "Exploder"

4. Navigate to the PHS 398 Research Plan form of your proposal.



5. Upload your Research Plan PDF file to the **0. Composite PDF** slot.



Using the “Exploder”

5. You should see that the division of the file has been successful.

6. Your attachment points will have PDF attachments associated with them.

Breaking apart the research plan succeeded:

Bookmarks Added to PDF:

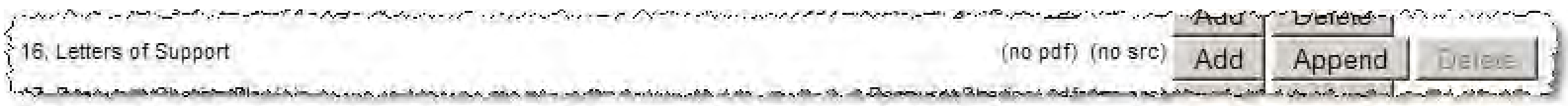
Specific Aims
Research Strategy
Progress Report Publication List
Protection of Human Subjects
Inclusion of Women and Minorities
Inclusion of Children
Vertebrate Animals
Select Agent Research
Multiple PD/PI Leadership Plan
Consortium/Contractual Arrangements
Resource Sharing Plan(s)
Bibliography & References Cited

The following recognized bookmarks were found and used to create the associated research plan sections:

Pg	Title
1	Specific Aims
2	Research Strategy
3	Progress Report Publication List
4	Protection of Human Subjects
5	Inclusion of Women and Minorities
6	Inclusion of Children
7	Vertebrate Animals
8	Select Agent Research
9	Multiple PD/PI Leadership Plan
10	Consortium/Contractual Arrangements
11	Resource Sharing Plan(s)
12	Bibliography & References Cited

Attaching Letters of Support

- Cayuse S2S offers an Append function to put several letters of support together without bundling.



- Use the **Add** button to add the first letter.

- For subsequent letters, use the **Append** button.
  - A source file cannot be added for additional letters.

- Selecting **Delete** will delete all items.

Viewing Proposals in PDF Format

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

1. Click the printer icon at the top right.
2. Check any form you want to print. You can select as many or as few forms as you need.
3. If you want to see the attachments to the form as well, check **Include any attachments**.
4. Click **Generate PDF**. Save or print the generated file.