

Cayuse SP PI Quick Reference Guide



Introduction

Cayuse Sponsored Projects (SP) is USC's pre-award and non-financial post-award management system. Cayuse SP integrates with several USC systems, including iStar, diSClose, IPACT, Trojan Learn, and Workday, allowing for a more streamlined and efficient connection between systems.

Below is a list of important information that will assist Principal Investigators in:

- Logging into Cayuse SP
- Certifying Proposals
- Locating Proposals
- Verifying Proposal Routing Statuses
- Locating Awards
- Downloading Award Documents
- Linking IRB/IACUC Protocols to Cayuse SP
- Identifying Helpful Resources

How to Log into Cayuse SP

Consistent with how users log into others systems protected by Shibboleth:

Step 1: Navigate to the USC Cayuse SP System: <https://usc.cayuse.com/>

Step 2: Enter your USC-issued Shibboleth username and password.

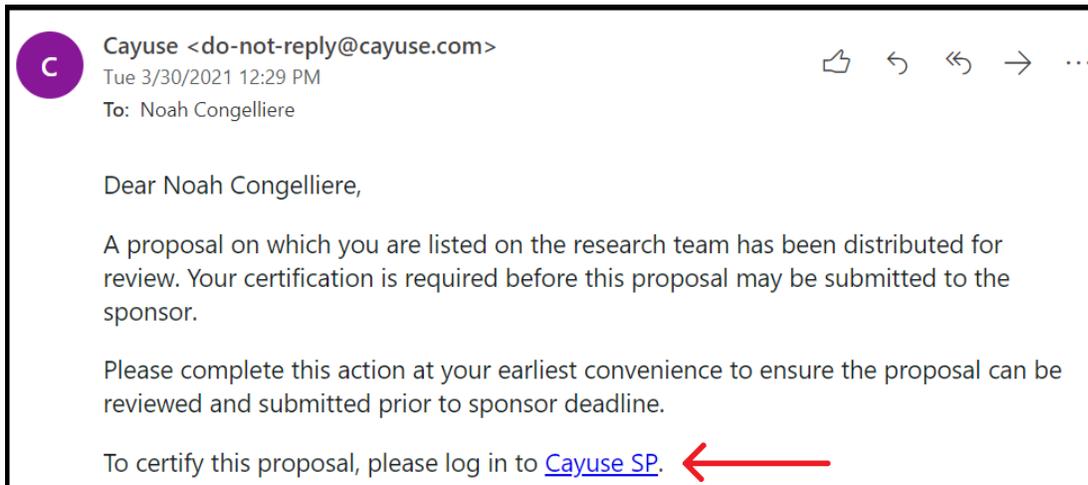
Step 3: Click "Sign in".

Once logged in to the system, you will be taken to the Cayuse Home Screen.

Please Note: When navigating to Cayuse for the first time, your browser may present a security warning prompting you to accept a certificate prior to entering your Shibboleth credentials. This is safe. Cayuse purchases and maintains electronic certificates that are approved for internet commerce and are compliant with internet security standards. You may accept the certificate permanently and proceed to the login screen.

How to Certify a Proposal

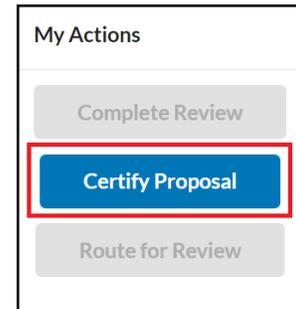
When a Proposal Record has been submitted into routing, a required certification attestation will be sent to all PI, Co-PI and Multi-PIs identified in the Key Personnel section of the Proposal Record. Each PI will receive an email that contains a direct link to certify the proposal (see below).



When the link is clicked from within the email, the Proposal Record will be automatically loaded. You will then need to click the “Certify Proposal” button in the upper-left corner of the Proposal Record under the “My Actions” area.

Please:

1. Read the Certifications (See Below).
2. Check the “Confirm My Certification” box.
3. Click “Certify”.



Confirm Certification [X]

I understand and certify that:

- I certify that the information submitted within the application is true, complete, and accurate to the best of my knowledge.
- I acknowledge the responsibility associated with my role as PI/Co-PI/Multi-PI and agree to comply with the sponsor's policies.
- I agree to accept responsibility for the conduct of the project and to provide the required reports and/or deliverables if the sponsored project is awarded as a result of the application.
- I certify that I am not debarred, suspended, proposed for debarment, declared ineligible or voluntarily excluded from current transactions by a federal department or agency.
- I certify that I have read the [Federal Mandate to Disclose International Collaborations](#) found [here](#).
- I certify that I have disclosed all international collaborations or support in the proposal and if not, I certify that I do not have any foreign support or involvement to disclose in the proposal.

Confirm my Certification

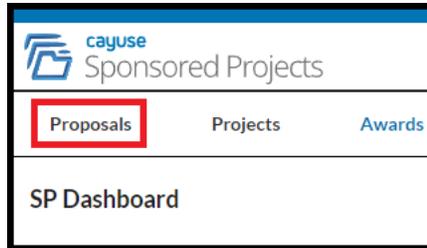
Comment

Please add a comment.

Cancel **Certify**

How to Locate Proposals

- Step 1:** Log into [Cayuse SP](#)
- Step 2:** Click Products > Sponsored Projects
- Step 3:** Click “Proposals”



In the Proposals section, you will find Proposal Records where you are indicated as a PI, Co-PI, or Multi-PI.

Please Note: Pending and funded proposals migrated from Quali Coeus will also be identified.

How to Open a Proposal

To open a Proposal Record, simply click the blue Proposal Number.

Proposal #	Project Title	Status
21-0124-P0001	11/1/2021, Faculty, Frances, NSF, Artificial Intelligence..	In Development
21-0123-P0001	11/1/2021, Faculty, Frances, NSF, Artificial Intelligence..	In Development

How to Sort Your Proposals

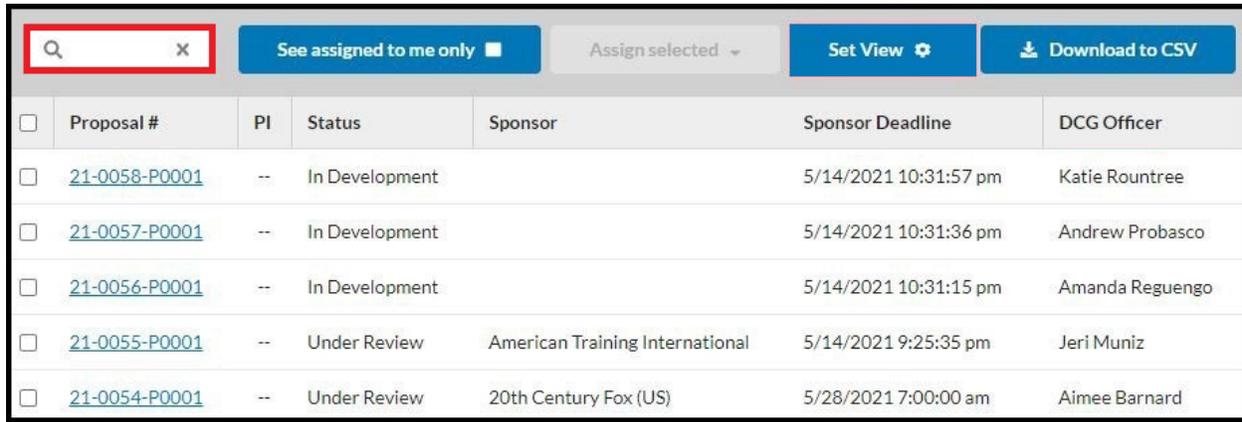
When you’ve clicked on the “Proposals” section of Cayuse SP, you will be taken to “The SP Dashboard”. This area contains different columns of information based on specific proposal data elements (Sponsor, Sponsor Deadline, PI etc.). You can set the view here to show only the column fields that are useful to you.

- Step 1:** On the SP Dashboard, click "Set View".
- Step 2:** Check only the boxes that contain the fields you want to see.
- Step 3:** Click “Update”.

Proposal #	PI	Status	Sponsor	Sponsor Deadline	DCG Officer
21-0058-P0001	--	In Development		5/14/2021 10:31:57 pm	Katie Rountree
21-0057-P0001	--	In Development		5/14/2021 10:31:36 pm	Andrew Probasco
21-0056-P0001	--	In Development		5/14/2021 10:31:15 pm	Amanda Reguengo
21-0055-P0001	--	Under Review	American Training International	5/14/2021 9:25:35 pm	Jeri Muniz
21-0054-P0001	--	Under Review	20th Century Fox (US)	5/28/2021 7:00:00 am	Aimee Barnard

How to Search for Proposals

You can also use the search function of the SP Dashboard to narrow your proposals by various data fields (Ex. Sponsor, Sponsor Deadline Date etc.)



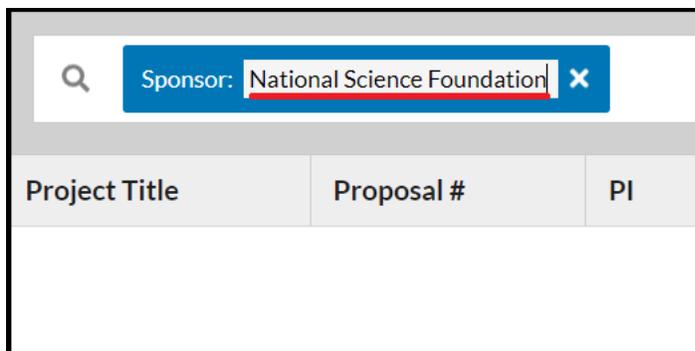
<input type="checkbox"/>	Proposal #	PI	Status	Sponsor	Sponsor Deadline	DCG Officer
<input type="checkbox"/>	21-0058-P0001	--	In Development		5/14/2021 10:31:57 pm	Katie Rountree
<input type="checkbox"/>	21-0057-P0001	--	In Development		5/14/2021 10:31:36 pm	Andrew Probasco
<input type="checkbox"/>	21-0056-P0001	--	In Development		5/14/2021 10:31:15 pm	Amanda Reguengo
<input type="checkbox"/>	21-0055-P0001	--	Under Review	American Training International	5/14/2021 9:25:35 pm	Jeri Muniz
<input type="checkbox"/>	21-0054-P0001	--	Under Review	20th Century Fox (US)	5/28/2021 7:00:00 am	Aimee Barnard

To Use the Search Function:

Step 1: Click the Search Bar in the SP Dashboard.

Step 2: Select the Data Field You Want to Search By (Ex. Sponsor)

Step 3: Type the Information into the Search Bar (Ex. National Science Foundation).



Project Title	Proposal #	PI

This will narrow the search results to show only the information you are searching for.

Where Is My Proposal in the Routing Process?

To check where your proposal is in the routing process:

Step 1: Log into [Cayuse SP](#)

Step 2: Click Products > Sponsored Projects

Step 3: Click "Proposals"

Step 4: Open the Specific Proposal

Step 5: Click the Routing Tab

Proposal Form	Routing	History	Access	Notes	Attachments
Routing for Review					
Team	Members	Decision	Date	Comment	
Department of Contracts and Grants	Jeri Muniz				
Keck School of Medicine of USC	Sydney Palmer				
Principal Investigator	Noah Congelliere	Certified	3/30/2021 2:33:36 pm	view	

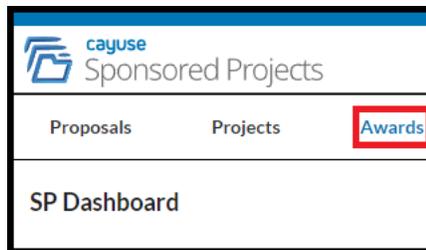
The “Routing” Tab of the Proposal Form will show all person(s) who still need to approve the proposal record in order to move the proposal status from *Under Review* to *Approved*.

How to Locate Awards

Step 1: Log into [Cayuse SP](#)

Step 2: Click Products > Sponsored Projects

Step 3: Click “Awards”



In the Awards section, you will find Award Records where you are listed as PI, Co-PI, or Multi-PI. *Please Note: Active Awards migrated from Kualu Coeus will also be identified.*

How to Open an Award

To open an Award Record, simply click the blue Award Number in the SP Dashboard.

>	<input type="checkbox"/>	Award #	PI	Project Title
>	<input type="checkbox"/>	22-0006-A0001-2	Arthur Toga	013082-00001
>	<input type="checkbox"/>	22-0004-A0003-1	Rong Lu	012332-00001

How to Sort Your Awards

When you’ve clicked on the “Awards” section of Cayuse SP, you will be taken to “The SP Dashboard”. This area contains different columns of information based on specific award data elements (Sponsor, Sponsor Deadline, PI etc.). You can set the view here to show only the column fields that are useful to you.

Step 1: On the SP Dashboard, click "Set View".

Step 2: Check only the boxes that contain the fields you want to see.

Step 3: Click “Update”.

How to Search for Awards

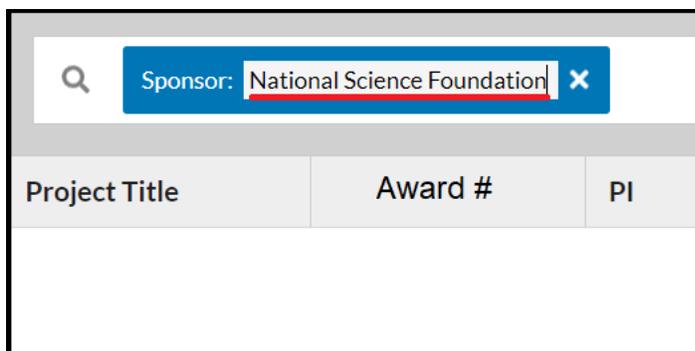
You can also use the search function of the SP Dashboard to narrow your awards by various data fields (Ex. Sponsor, Sponsor Deadline Date etc.)

To Use the Search Function:

Step 1: Click the Search Bar in the SP Dashboard.

Step 2: Select the Data Field You Want to Search By (Ex. Sponsor)

Step 3: Type the Information into the Search Bar (Ex. National Science Foundation).



Project Title	Award #	PI
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This will narrow the search results to show only the information you are searching for.

How to Download Award Attachments



Award Form	Routing	Award History	Funds	Subawards	Tasks	Notes	Attachments	Links
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Award documents (e.g., Notice of Award, Agreement, Award Modification, etc.) are stored in the Attachments tab within the Award Record. The documentation can be downloaded to your local PC by simply clicking the name of the file.

Step 1: Open the Award Record.

Step 2: Click on “Attachments”.

Step 3: Open the Attachment.

Step 4: Save to Your Local PC.

How to Link an IRB Protocols to Cayuse SP

For iStar applications initiated on/after *March 1, 2023*, you will now be able to link an IRB protocol directly to a Cayuse SP proposal or award that will fund the study. This new linkage will be initiated within iStar and will provide quick and easy access to the proposal, award, and

associated protocol between the iStar and Cayuse SP systems.

- Directions for Linking an IRB Protocol to Cayuse SP Can be Found [HERE](#).
- Directions for Linking an IACUC Protocol to Cayuse SP Can be Found [HERE](#).

Where Do I Go for Help?

Below is a helpful list of Cayuse SP post go-live contacts and resources that will assist you with any potential technical or programmatic inquiries.



Need Real-Time Guidance or Assistance?

DCG has created a dynamic [Slack Channel](#) that will serve as a central hub for all Cayuse SP related questions/issues that arise after go-live. Any questions or technical concerns should be submitted here, and the appropriate contact will be deployed to address the inquiry. Submit your question or issue via Slack and our training team will answer and/or connect you with the right subject matter expert.

Have a Question About a Specific Proposal or Award?

[DCG Officers](#) are available to answer questions regarding issues related to any specific proposal and/or award. In addition, DCG has running Office Hours on Wednesdays at 9am-10am via [Zoom](#). Feel free to join and ask any questions you may have regarding a particular proposal or award.

Need Additional Training?

DCG offers a wide variety of training, including:

- Online Course: [Preparing Proposals in Cayuse SP](#)
- [Web Guides](#)
- [KC > SP Crosswalk Video](#)
- [Frequently Asked Questions](#)

Any additional training inquiries can be sent to [Joe Magallanes](#) in the Department of Contracts and Grants.

What About Subawards?

DCG has updated their [Procedures for Issuing Outgoing Subaward Agreements](#) webpage to incorporate the implementation of both Cayuse SP and Workday. Step-by-step directions are provided for initiating Subawards, along with an explanation of how Workday and Cayuse SP are connected with regard to their instantiation. Any additional Subaward inquiries can be sent to [Kim Eudy](#) in the Department of Contracts and Grants.

Award Setup and Review

DCG offers a set of [customized web guides](#) that walks users through understanding the Post-Award module of Cayuse SP, including how to:

- Look up Award Records
- Review Award Data
- Retrieve Award Documentation

Any additional Award-related inquiries can be sent to [Lisa Villaflores](#) in the Department of Contracts and Grants.

Having Technical Issues?

[Cayuse Help](#) is available for any technical issues related to the Cayuse SP system, including logging in, user privileges, and trouble accessing proposals and awards.