# Detailed Guide on how to Create a Proposal Using Cayuse 424

Cayuse 424 streamlines the development, collaboration, and electronic submission of grant proposals. You can easily locate funding opportunities and complete proposal forms. This document describes how to create a proposal using Cayuse 424.

Finding an Opportunity

The **Opportunities** tab displays a list of federal funding opportunities that have been downloaded into Cayuse from Grants.gov. You can use the Search field to search the opportunities by keyword, Opportunity Number or CFDA Number.

I. Using Internet Explorer or Firefox, navigate to ucmerced.cayuse424.com

II.Log in to Cayuse 424 using your UCM NetID and password.
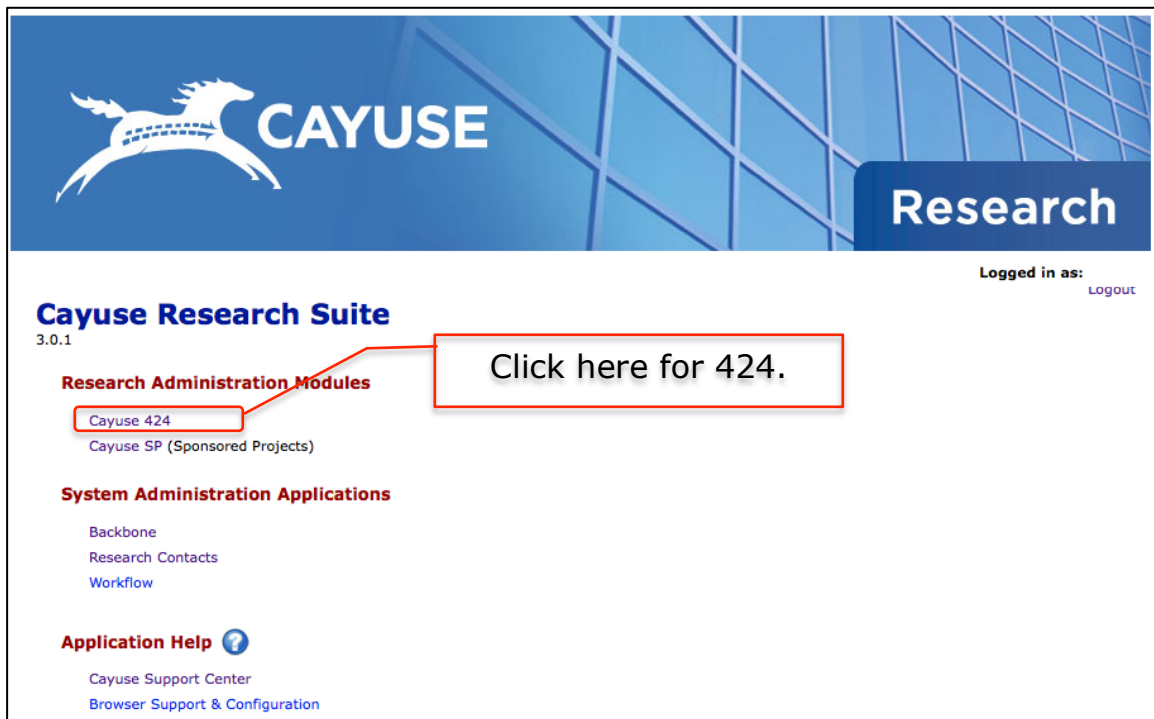
III.   Click the **Opportunities** tab.

IV.   In the Search field, enter a keyword, Opportunity Number or CFDA Number and then click **Search.** The list filters to display any opportunities that match the criteria entered.

V.   To view more information about a funding opportunity, click the **Opportunity Details** icon .

VI.   If the opportunity you need is not displayed, you can download additional opportunities from Grants.gov. To do this, perform the following steps:

a.   From the Opportunities tab, click the **Download Opportunities** button.

b.   Enter the Opportunity Number or CFDA Number.

c. Click **Download Opportunities.** The list updates to include any opportunities that match the criteria entered. Then repeat steps 4 and 5 above.

Creating a Proposal

I. To create a proposal, click the **Create Proposal** icon to the left of

an opportunity on the Opportunities tab. Alternatively, from the Proposals tab, click the **Create Proposal** button at the top of the screen.

Select the Grants.gov/Research.gov radio button on the Create page.

II. Complete the fields in the Create Grants.gov/Research.gov Proposal window. The fields that display may vary depending on the opportunity you select.

a.   Enter a short title in the Proposal Name field. Each proposal is given a short name used only in Cayuse. Some solicitations require particular naming conventions you must follow. If not, enter any useful short title that will help you find this proposal in the future.

b.   Select the **Principal Investigator.** If the PI's name isn't displayed

in the list, type the last name in the Search field, click Search for PI and then select the PI's name.

c. In the Organization field, select **The Regents of the University of California** from the drop down menu.

d. Select the appropriate **Default IDC Rate** (On Campus or Off Campus) using the drop-down menu.

e. Select the **Budget Type** or the **# of Budget** periods the proposal will include.

f. Specify the proposal **Due Date.**

g. Cayuse will select a validation type based on the Sponsor of the solicitation. If you feel you need to change this option, select a different **Validation Type.** Cayuse's proposal validation features will provide you with feedback for any errors within the proposal.

III. Click the **Create Proposal** button. Cayuse displays application forms that look very much like the 424 application forms you have worked with previously.

Completing the Proposal Forms

The process of completing proposal forms in Cayuse 424 is similar to that of other proposals you've completed in the past – with a few key differences.

I. The application saves every time you change pages. There is a save icon at the top of the proposal that you can use to save information at any time.

II.The **Auto fill** feature enables you to select a user whose role allows them to be entered into a given section. You can click the icon to quickly add information from the person's profile to the application. If you fill information and then find it is incorrect, you can either update directly on the application or return to the profile, make updates and then 're-fill' using the green circular button for administrative personnel and the Institutional profile (note if the IDC information is not showing on all budget categories – use the re-fill Institutional

profile button):

III.   Or the Manage button for Key Personnel:

IV.   *Please note: Thea Vicari (email: tvicari@ucmerced.edu) should now be indicated as the 'Person to be Contacted on Matters involving this application' and the 'Authorized UC Merced Representative.'*

V.   The **Error/Warning/Info** feature at the bottom of the window dynamically updates to indicate any areas of the proposal that are

not yet completed or have contents that do not meet the application requirements. You can click the **Error/Warning/Info** button to begin the validation process.
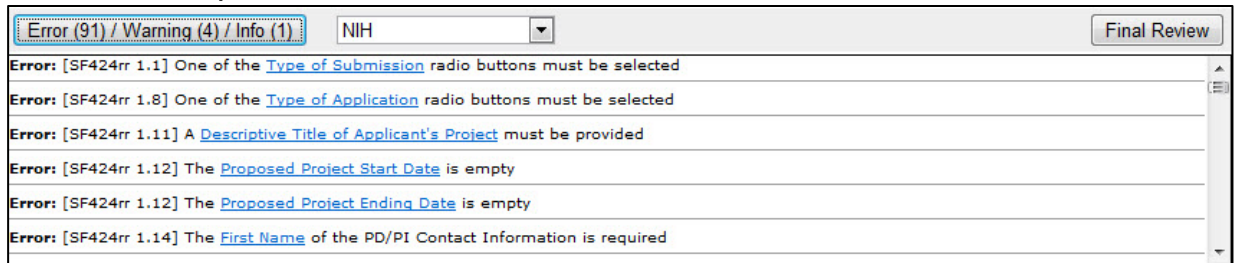
VI. **Budgets:** Cayuse improves the efficiency and accuracy of budget building. Salaries will need to be entered for personnel. In addition, future years can be quickly built based on the first budget period.

Click on the **Escalate** button to quickly replicate or escalate future years.

Note the navigation between budget years is through a drop down on the top of the center panel Navigation between pages (Page 1= Sections A & B; Page 2=Sections C, D & E; Page 3=Sections F-K; Page 4=Cumulative) is using the left page navigation.
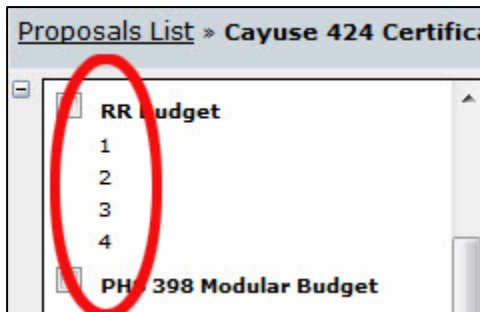
For NIH applications, *even if you will be submitting a modular budget, UC Merced requires a detailed budget to be entered to validate the calculations and the number of modules. You will receive a warning if you are submitting modularly that no detailed budget justification is included. You can IGNORE this warning.*

VII. Tips & Tricks

a. Use the left hand navigation bar to move between the pages of the application. Alternatively, you can minimize the left hand navigation and a drop down box listing each form page will be available on the top of the screen.

b.   When another user is in a proposal, a **Lock** icon displays in the Proposal List, along with the user's name. You can click the **R (Read Only)** button to view the proposal. With the appropriate permissions, you can 'Break Lock.' This enables you to take over the management and editing of the record and the other user will then be locked from making changes.

Sharing Your Proposal with RDS

To share your proposal, you can print or export it as PDF by clicking the

Print icon in the upper right hand corner of the window. You can select which form pages you want to export to PDF using the check boxes (including options for attachments, such as budget justifications, and biosketches). Then select the Generate PDF button and a pop up box will display a pdf of the pages you selected. This can be uploaded to Box, saved, or sent via email to any recipient.

You can also copy a hyperlink to the proposal in Cayuse by clicking the

Proposal Quick Link icon located next to the proposal name at the

top of the window.

Note that only users with the appropriate permissions will be able to access the proposal using the link.
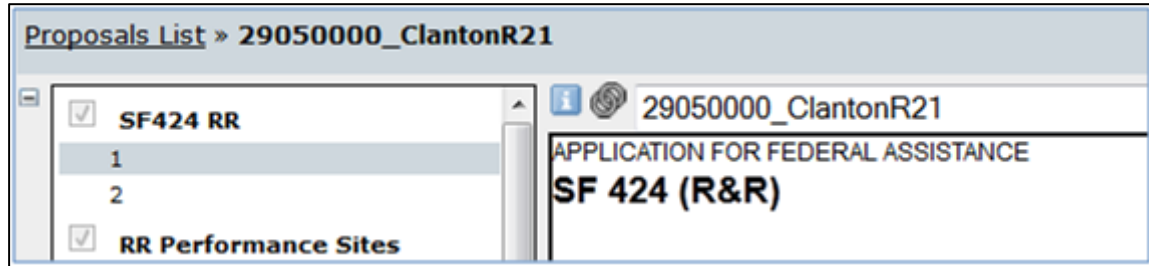
Tracking the Proposal After Submission to Grants.gov

When the proposal is submitted, a Grants.gov tracking number is recorded in the Proposal Submission History. Click the **Submission** icon in the upper right hand corner of the proposal or on the bottom of the navigation pane to view the Grants.gov tracking number, date and time of receipt, and submitter. Click on the hyperlink GRANT# to see the status as if you had used the Track Application feature at the Grants.gov website.