Use Cayuse SP to:

- Review a Proposal - p. 2
- Approve or Reject a Proposal – p. 5
- Track status of routing approvals for the proposal – p. 7
- View proposal and award records for your unit – p. 7

IPF Approval Overview

All proposals are routed through a chain of approvers before being submitted to the proposal sponsor. If you are an IPF approver and your unit is in a proposal's routing chain, you will need to approve the proposal as it progresses through the chain.

IPF approvers (Deans, Chairs, Directors, VP Business & Finance, Provost Office, or their designees) are notified via an automatic email when a proposal record requires authorization. The Department Chair of the lead PI is required to approve first, then others will be allowed to approve. IPF is “Internal Processing Forms”.

All IPF approvers will be asked to review the proposal and its attachments in Cayuse SP and approve as soon as possible so that the proposal can be submitted to the sponsor by deadline. There is also a section in the system to add notes as appropriate.

If an expedited approval is requested, the Development Specialist will contact the approvers via a separate email.

IPF approvers have the option to reject the proposal if it contains a serious mistake (such as incorrect cost share or released time, a significant error in budget calculations, or a PI not listed) and to provide an explanatory note for the rejection. If the error is clerical or minor, please provide the explanatory note so the Development Specialist can correct the error, but also proceed with your approval.

If the proposal is rejected due to a serious error, it will be returned to the Lead PI and the CSE Development Specialist to address the concern and re-issue the routing.

After all units have authorized, the proposal record is assigned to Development staff for review.
Reviewing a Proposal

1. Log into Cayuse using your Chico State credentials (single sign on)

2. From the landing page, click on Cayuse SP

3. If you have proposals to approve, you will see a number next to Unit Approval Inbox. Click on your Unit Approval Inbox.
4. From your Unit Approval Inbox, beneath the **To be Authorized** tab, click on the proposal number of the proposal you need to approve, to visit the Proposal Routing Status page.

5. The **Proposal Routing Status** page provides this information:

   1. **General Information**: shows basic information, such as proposal and project numbers, lead PI, sponsor, and submission deadline.
   2. **Proposal Review**: provides options to review, authorize, or reject a proposal. You can also authorize or reject a proposal when viewing it.
   3. **Informational Tabs**: provides additional data regarding the submission, including awards and pre-award spending requests. The Compliance tab will show associated research protocols, but only after the submission has been approved.
   4. **Routing Information**: shows a list of authorizing individuals and units and where the submission is within the routing process. If a unit does not have an authorizing person, one will need to be added for that unit before a submission can advance through the routing chain. Contact a Development team member to add an approver to a unit.
   5. **Status History**: shows time stamps of submission status changes.
To review the IPF (proposal), you have two choices:

1. Click on View IPF. This will take you to the proposal record. Use the left-hand menu with the green checkmarks to toggle between each section and view its contents. Under **Proposal Attachments**, you will find the internal Excel budget, the budget justification, and the expanded scope of work (if relevant).

2. Click on PDF icon at the top of the page next to the proposal number. This PDF allows you to view all the IPF sections in a single document. **However, it will not include the Proposal Attachments**, so go into the IPF under **Proposal Attachments** to view the budget, the budget justification, and the expanded scope of work (if relevant).
Approving or Rejecting a Proposal

1. After reviewing the proposal, at the bottom of the proposal menu, click **Authorize Proposal** or **Reject Proposal** on the Proposal Routing Status screen.

2. On the Proposal Authorization screen, review your responsibilities as an IPF approver, then enter any comments you have regarding the proposal. Your comments will be visible to the Research Team, proposal reviewers, and the Development Specialist.
3. Click **Submit Authorization** or **Submit Rejection** (from the Reject Proposal screen). If you reject a proposal, please provide the reason in the comments field.
Other Functions

From your SP Dashboard, you have the ability to:

- Track status of routing approvals for the proposal
  - Click Proposals in My Unit
  - View “Units that must authorize this proposal” to see authorizing decision/status

- View proposal records for your unit
  - Click Proposals in My Unit
  - Click on a proposal number for more information

- View award records for your unit
  - Click on Awards in My Unit
  - Click on Award number for more information

If you have any questions about Cayuse, please contact your CSE Development Specialist or Julie Jessen, Manager of Grant Development and Pre-Award.