

### 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](#)

[Cayuse link](#). Note that either Firefox or Chrome are recommended for your best Cayuse experience, on either a PC or Mac platform.

## IPF Approval Overview

In Cayuse a proposal record is also called an IPF (Internal Processing Forms). 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.

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**.

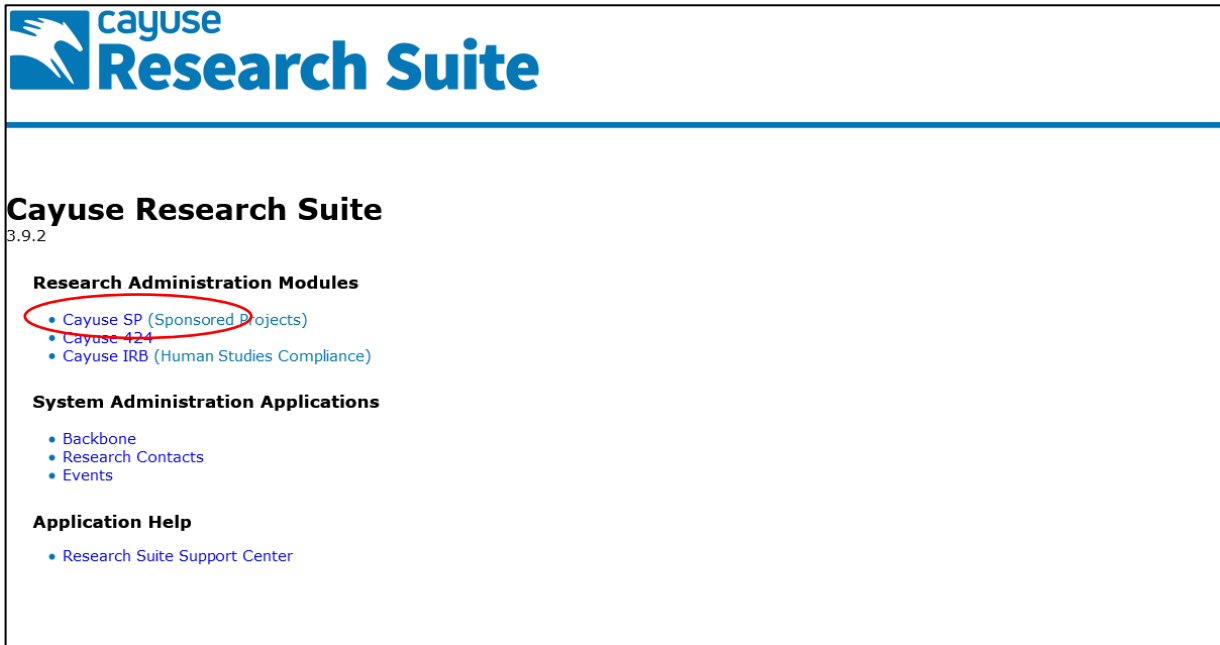
If you have a question about a proposal, you may also email the development specialist separately. The development specialist's name is listed under "Proposal Owner" on the General Info screen.

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.

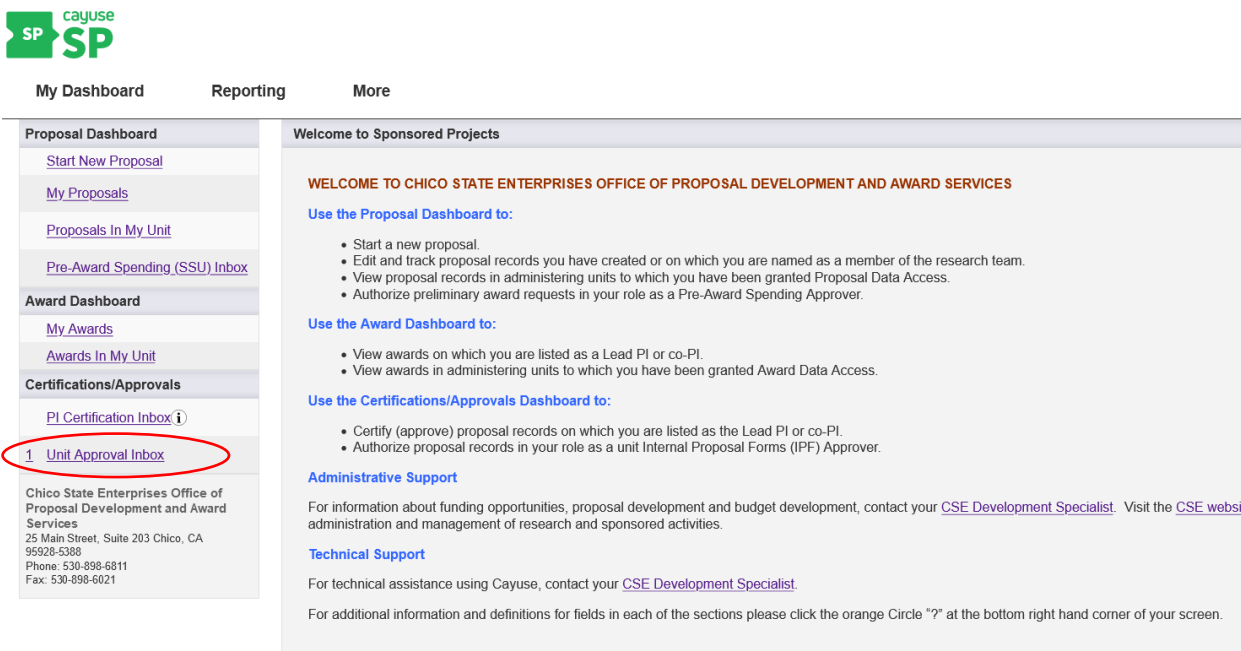
After all units have authorized, the proposal record is assigned to Development staff for review.

# 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.

The screenshot shows the Cayuse SP interface for the Unit Approval Inbox. The 'To Be Authorized' tab is active, displaying a list of proposals. The first proposal, with ID '21-0011', is highlighted and circled in red. The table below shows the details for this proposal.

Prop No.	PI	Unit	Project Name	Sponsor	Deadline	PI Cert
21-0011	Fishel	Mech & Mchtrnc Engr & Adv Manf	ERC	UC Davis	06/01/2021	No

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Chico State Enterprises Office of Proposal Development and Award Services  
25 Main Street, Suite 203 Chico, CA 95926-5368  
Phone: 530-898-6811  
Fax: 530-898-6021



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 a 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.

>> Proposal Routing Status

1 Proposal: [20-0024](#)  Sponsor: National Institutes of Health Submission Deadline: 2/28/2022  
 Project: [A20-0005](#) Prime Sponsor: Proposed Begin-End Dates: 2/15/2019 - 4/30/2024  
 Lead PI: [Penny Principal](#) Instrument Type: Proposed Total Amount: \$ 0.00  
 Admin Unit: Physiology Specialists:  
 Project Title: Increased risk of heart disease in shift workers

2 [View IPF](#) [Authorize Proposal](#) [Reject Proposal](#)

3 Approvals Compliance Status History Pre-Award Spending Awards  

The above proposal has been successfully submitted. All lead/principal investigators and approving units listed below have been notified and should electronically authorize (in routing order for units) this proposal before it is received by the Office of Sponsored Research.

Investigator(s) who must certify this Proposal

Investigator	Role	Decision
<a href="#">Penny Principal</a>	Lead Principal Investigator	Certified on 02/27/2019 03:20 PM PST

4 Unit(s) that must authorize this proposal

Order	Unit	Authorizing Person(s)	Authorizing Decision
1	Physiology	<a href="#">Robin Reviewer</a>	Not Yet Reviewed
2	Biological Chemistry		Not Yet Reviewed
3	Biomedical Science		Not Yet Reviewed
4		Admin Office	

5 Status History

Status	Person	Date
Changed to: Dept Approval In Process	Changed by: <a href="#">Gloria Global</a>	7/10/2019, 2:37 PM PDT
Changed to: Funded	Changed by: <a href="#">Gloria Global</a>	4/23/2019, 11:04 AM PDT
Changed to: Submitted for Routing	Changed by: <a href="#">Reijo Researcher</a>	2/27/2019, 11:44 AM PST
Changed to: Unsubmitted	Changed by: <a href="#">Reijo Researcher</a>	2/27/2019, 11:32 AM PST

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 if you prefer to review the proposal via the PDF, you can easily access the budget and other routing documents by clicking on the paperclip icon.

## 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.



The screenshot shows a web interface for proposal management. At the top, it says "Item List" followed by the proposal ID "21-0011" and a small icon. Below this is a instruction: "View or Edit completed sections by clicking the name next to the check." A list of sections follows, each with a green checkmark and a blue link: "General Information" (with a red double arrow), "Investigators/Research Team", "Proposal Abstract or Summary", "Budget Overview", "Proposal Attachments", "Subawards", "Sponsor-Specific Compliance (Conflict of Interest/RCR/PSA)", "Regulatory Compliance", "Export Control", "Intellectual Property", "Additional Proposal Information", "Location of Sponsored Activities", "Submission Notes", and "Approving Units". At the bottom, there are three buttons: "View Routing Status", "Authorize Proposal" (circled in red), and "Reject Proposal".

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.

If you have a question about a proposal, you may also email the development specialist separately. The development specialist's name is listed under "Proposal Owner" on the General Information screen.

>> Proposal Authorization

As **Department Chair or Unit Director**, I understand and assume the following responsibilities with respect to this application:

- It is an appropriate activity within the Department/Center/Institute; and supports the mission of the University.
- That the Department/Center/Institute has agreed to provide the resources identified in this application.
- With respect to this application, I approve that this individual is eligible to serve in the role of PI.
- I approve assignments of personnel in my department or unit as stated in this proposal.
- If the proposal includes sponsor-required or mandatory cost sharing, it is the responsibility of the Department or College to provide an internal cost sharing source should the
- In the event that I have delegated my signature authority to the person signing this Internal Processing Form in my absence, a copy of the delegation is on file at my organization and responsibility remains with me.

As **College Dean or University Administrator**, I understand and assume the following responsibilities with respect to this application:

- It is an appropriate activity within the Department/Center/Institute; and supports the mission of the University.
- That the Department/Center/Institute has agreed to provide the resources identified in this application.
- If the proposal includes sponsor-required or mandatory cost sharing, it is the responsibility of the Department or College to provide an internal cost sharing source should the
- I certify the project's compatibility with College policies including space, facilities, funds and personnel.
- In the event that I have delegated my signature authority to the person signing this Internal Processing Form in my absence, a copy of the delegation is on file at my organization and responsibility remains with me.

As **VP for Business and Finance (or designee)**, I understand and assume the following responsibilities with respect to this application:

- I certify that commitments made (e.g., of State or University resources, cost share, or space and facility availability) are generally appropriate and consistent with University policies.

As **Chief Executive Officer, on behalf of the Provost's Office**, I understand and assume the following responsibilities with respect to this application:

- I certify the proposed project is consistent with academic policies, goals and objectives of the University.

Please enter any comments you might have regarding this proposal.

Submit Authorization

Cancel

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



My Dashboard	Reporting
<b>Proposal Dashboard</b>	
<a href="#">Start New Proposal</a>	
<a href="#">My Proposals</a>	
<a href="#">Proposals In My Unit</a>	
<a href="#">Pre-Award Spending (SSU) Inbox</a>	
<b>Award Dashboard</b>	
<a href="#">My Awards</a>	
<a href="#">Awards In My Unit</a>	
<b>Certifications/Approvals</b>	
<a href="#">PI Certification Inbox</a> ⓘ	
Unit Approval Inbox >>	

If you have any questions about Cayuse, please contact your [CSE Development Specialist](#) or [Julie Jessen](#), Director of Grant Development and Pre-Award.