What is Cayuse SP?

Cayuse SP allows PIs to quickly and accurately prepare a proposal for internal routing and review, and acts as the central hub in which research administrators gain full transparency into the entire research lifecycle, from awards, and budgets, to accounts.

Key features of Cayuse that Marshall University will benefit from include:
- Efficient Proposal Development
- Centralized Award Management
- Automated Compliance Tracking
- Advanced Reporting and Analytics

Cayuse SP replaced the Authorization to Submit (ATS) Form previously used.

Login in to Cayuse

URL: https://marshall.app.cayuse.com
Username: MUNet ID
Password: University password

Cayuse SP is a Single Sign On (SSO) application.

System Setup

The Research Suite can be accessed on various browsers on either Windows or iOS systems.
(Firefox, Google Chrome, Microsoft Edge, Google Chrome and Apple Safari.

Note: Cayuse discontinued support for Internet Explorer 10 and older.

Browser Configuration Settings:
- JavaScript: On
- Cookies: Enabled
- Popups: Allowed

Getting Started with Cayuse

With the switch to the Cayuse system, the Cayuse Sponsored Projects (SP) which is also referred to as the Proposal Record Form, will take the place of the Authorization to Submit (ATS) Form that has been previously used**.** All internal approvals will be obtained electronically by routing within the SP System.

To begin the proposal process with MURC, you will need to:
- **Identify Opportunity**
- **Review Opportunity with Assigned Pre-Award Officer**
- **Determine Intent to Submit**

Once the above steps have been completed, you can begin a Proposal Record in Cayuse SP.

Cayuse Platform Homepage

Once logged in, you will see the Cayuse Platform Homepage.

On this screen, you see My Tasks. This is where you will find requests from your Pre-Award Officer if any edits or documentation are needed. You can also assign tasks to others involved in your project.

Locating your Assigned Pre-Award Officer

Your MURC Pre-Award Officer will provide the following services:
- Assist investigators with the identification of potential sponsors
- Interpret proposal guidelines and developing budgets
- Coordinate institutional approval for proposal submissions within the Cayuse System.
- Negotiate the award with the sponsor.

Department allocations can be found on the Pre-Award webpage located at www.marshall.edu/murc/pre-award-services/

Dashboard

The Cayuse SP Dashboard allows you to do the following:

1. **Start a New Proposal**
2. **In Development**
3. **Under Review**
4. **Approved**
5. **Submitted to Sponsor**

The Dashboard also includes a list of proposals that can be sorted by different fields such as in development, under review, approved, and submitted to the sponsor.
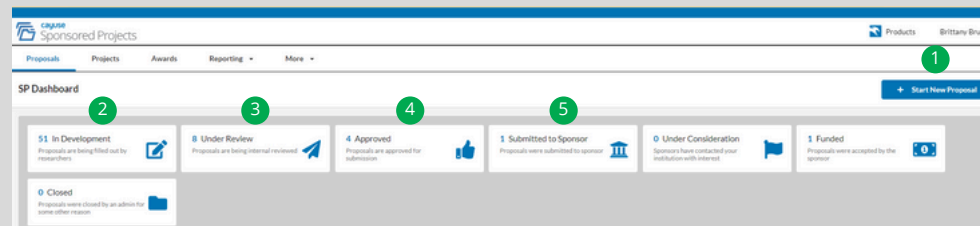
How to Start a Proposal Record

- From the **Cayuse Home Page**, click on the **Products** drop-down menu and click Sponsored Projects.
- To begin a new Proposal, click **Start New Proposal** on the Proposal Dashboard.
- Select **New Proposal** and enter a title for your project. Click Create New Proposal

Proposal Record Screen (Cayuse SP)
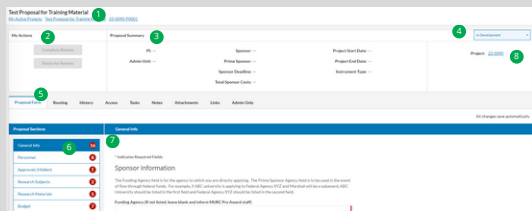
The Proposal Record Screen consists of the following:

1. Project Name
2. My Actions
3. Proposal Summary
4. Status
5. Proposal Tabs
6. Proposal Sections
7. Proposal Form
8. Connected Link

Proposal Sections

The proposal sections will appear on the left side of the proposal form and show all of the sections that must be completed before routing for internal approvals. This section has the same information as the ATS Form that was previously used.

An asterisk (*) indicates that a question must be answered before the page can be saved.

Understanding Form Icons:

- **Green Checkmark:** All required fields within that section are complete.
- **Red Number:** One or more of the required fields within a section are not populated.

Linking with Cayuse S2S for the Proposal Application

Cayuse System-to-Systems (S2S) is a way to streamline the grant application process at Marshall University. Applications that are submitted through Grants.gov are able to be submitted in Cayuse S2S.

At this time PIs will not be initiating Cayuse S2S applications. Your assigned Pre-Award Officer will initiate the proposal once your Proposal Record in Cayuse SP has been completed. You will receive information from your officer alerting you that the application has been started and will provide additional information on how to complete it.

Additional Tabs

Proposal Forms include additional tabs that are optional to complete You may fill in the information in the tabs at any time:

- **Routing**
- **History**
- **Access**
- **Tacks**
- **Notes**
- **Attachments**
- **Links**
- **Admin Only**

Proposal Form	Routing	History	Access	Tasks	Notes	Attachments	Links	Admin Only
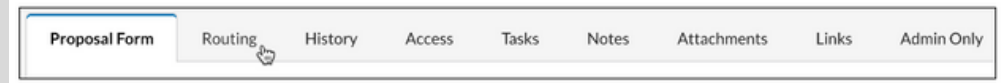
Project Title Name Convention

The title of the project when creating a new Proposal Record Form should be the agency name and the PI's name. Example: NIH, Ima Investigator. This is not the name of the project, there will be a place to add that in later.

Create New Proposal

○ This proposal is not related to any existing proposals or awards (Create New Project)

Enter a title for your project:

NIH, Ima Investigator

○ This proposal is related to existing proposals or awards (Add Proposal to Project)

Cancel   Create New Project

How to Add Key Personnel

- The **Project Personnel Information** section of the Proposal Record is where PI's and Co-PI's will be entered.
- The PI should be the first entry with the role of Principal Investigator.
- To add additional project personnel, use the **Add Team Member tab**.
- **Internal Association = Department** and will appear once the name has been entered into the Name field.
- If you believe that the department available for selection is in error, please notify your MURC Pre-Award Officer.
- Marshall University does not use the **Credit** feature in Cayuse, so you may ignore these fields.

How to Enter a Budget

- The budget in the **Budget Proposal Section** is a snapshot of the initial and total requested budget. The full budget and budget justification should be included as an **Attachment Section**.
- Some information will be auto-populated but it is important to complete all required fields in order to **Save**.
- The budget spreadsheet and justification must be attached before a proposal can be routed for institutional approval.

Fringe Benefit Rates FY2025

(*Effective July 1, 2024 – June 30, 2025***)**

MU, Full-time Employees	24.97%
MU, Part-Time Employees	16.22%
MU, Graduate Assistants & Student Workers	0.00%
MURC Full-Time Employees	25.85%
MURC Part-Time Employees	4.55%

PDF File FY2025 Rate Agreement

FY2024 can be found here.

How to Add Subawards

- If a subawardee is included in the proposal, search in the box provided.
- If the subawardee cannot be found, please provide it in the next box and email your Pre-Award Officer.
- As you add subawardees, a list of all subawardees for your project will be developed. If necessary, you can remove one from the list by clicking "Remove" to the right of a subawardee.
- If there are no subawardees included click "No" and move to the next page.

How to Add Attachments

- If a subawardee is included in the proposal, search in the box provided.
- If the subawardee cannot be found, please provide it in the next box and email your Pre-Award Officer.
- As you add subawardees, a list of all subawardees for your project will be developed. If necessary, you can remove one from the list by clicking "Remove" to the right of a subawardee.
- If there are no subawardees included click "No" and move to the next page.

Submitting a Proposal for Routing

- After you have received green check marks for all of the components of the proposal, it can be submitted for routing and approval.
- Once a proposal is submitted for routing you will receive an email indicating that the proposal has been submitted and requires certification as a PI.
- The assigned Pre-Award Officer will receive an email indicating that the proposal has been submitted and requires their approval.
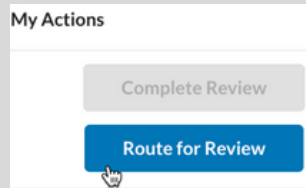
Certifying Proposal (PIs)

- Once a proposal enters routing, the PI and Co-PIs will be required to certify the information included in the proposal form and contained in the documents attached to the form.
- Each PI/Co-PI in the routing chain will receive an email message that contains a direct link to certify the proposal.
- You will need to carefully review all information provided in each of the proposal tabs.
- To certify the proposal, click the blue **Certify Proposal** button.
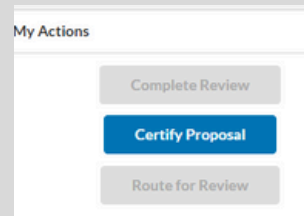
- The **Confirm Certification** screen will appear.
- Check the box to **Confirm my Certification**.
- Then click the blue **Certify** button.

Certifying Proposal (Departmental Approvers)

- After receiving an email to approve the proposal, any of the individuals designated as departmental approvers may log in and approve the proposal on behalf of the department or college.
- Once logged in, they will be able to see whether or not the PI has certified the proposal.
- It is recommended that an Approving Department not approve until the associated PIs as certified.
- The **Home page** will show that proposals are awaiting their review in the **Dept Approval Inbox** under **Certifications/Approvals**.
- The approver can click on a proposal number in the list, which takes them to a **Proposal Routing Status page**.
- When they are ready to approve, they will click the **Authorize Proposal** button shown mid-way down the page.

Note: All Investigators must certify the proposal before the department approvers can complete the review and approval process.

Questions?

MURC is available to assist with any questions you may have regarding Cayuse. Email cayusesupport@marshall.edu

Additional helpful guides and training that can be found at www.marshall.edu/murc/cayuse