

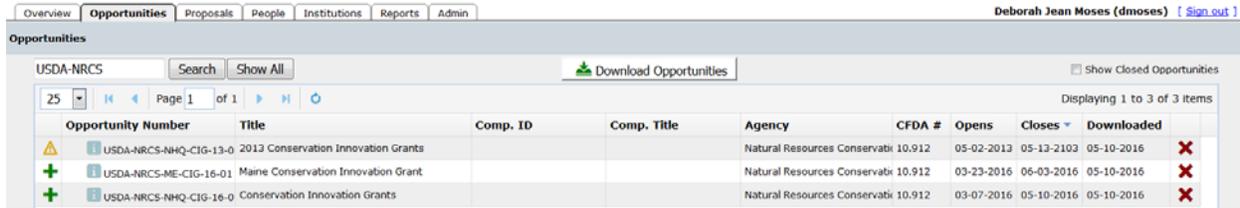


Cayuse Tips & Tricks

OSPA Pre-Award – May 2016

Starting a Proposal Package

First search for the opportunity using the search field. Either the opportunity number or the title may be used.



If the opportunity has not been drawn down, click on the Download Opportunities button and search for the opportunity, using the Opportunity Number. If you are unable to find it, the CFDA may be used. Note: The CFDA number may yield a large number of results.

Cayuse uses a number of icons to complete tasks. Position the mouse over the icon to reveal its function.



Use Plus sign next to the correct opportunity to start a proposal



Copy/Transform icon is used to transform a Cayuse package into a new opportunity or make a copy of an existing proposal. This will reduce data entry for resubmission and allow you to make changes to a proposal package while also having a backup (Cayuse automatically saves changes).



Pencil icon represents autofill which draws information from the Cayuse database. Use Autofill whenever possible to reduce time spent in data entry and reduce clerical error. Note: If you see an error on the autofilled information, correct it in the people tab.



Re-autofill is used to refresh from the people or institution tab any updates that may have been added since the proposal was started.

- If you utilize re-autofill, information that has been hard entered will disappear
- Re-autofill on the budget sections will cause newly entered F&A rates to appear



Permissions

Permission should always be granted to the PI to access proposal as soon as it is initiated

Error (39) / Warning (11) / Info (3)

Errors and warnings are just a guide devised based on what the agency generally expects. They are not program specific.

You must always *read and follow the instructions from the RFP.*

Validate Proposal

Under electronic submission tab, conduct a final check to validate proposal. This validation is connected to grants.gov and it will show what errors will actually occur at submission.



The Replicate/Escalate staircase will replicate and escalate detailed budgets. Use “replicate” to copy selected budget categories from one budget period to another. Use “escalate” to increase budget line items by a specific percentage across several budget periods.



Support

Cayuse Help and Support files may be found by selecting the support button at the bottom of the screen in the Overview tab. Use the search function to browse topics. Contact information for the Help Desk may also be found here.