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This guidance is intended to provide specific instructions applicable to GW proposals and how proposals are entered, routed and approved through GW. For additional instructions on using Cayuse 424 (building a grants.gov proposal submission, building a subaward, etc.), we encourage you to utilize the [Cayuse 424 User Reference Manual](#) on the Cayuse Support page. At several points in these instructions, we will point you to a specific section of Cayuse Support to further reference.

Cayuse 424 Routing & Submission Guidelines

Browser Settings

- The preferred internet browser for the Cayuse System is Mozilla Firefox version 21 but it can be accessed through Internet Explorer version 9 as well.
- You will need the following configurations:
 - JavaScript **Enabled**
 - Cookies **Enabled**
 - Pop-Up Blockers **Disabled**
- Please view the appropriate link below for detailed instructions on how to configure these features:
 - [Firefox Settings](#)
 - [Internet Explorer Settings](#)
 - **FOR MAC USERS:** you can use Cayuse 424 on Macintosh computers. **We recommend using the Firefox browser, but Cayuse 424 provisionally supports Safari and Chrome.**
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Logging In To Cayuse

- Go to <https://gwu.cayuse424.com/>
- To add to your browser favorites or bookmarks, you will have to manually type in the address.
- Your username is your GW NetID (the part of your e-mail address that precedes @gwu.edu) and corresponding password. If you cannot access Cayuse, please email your pre-award Sponsored Projects Administrator (SPA I) or askovpr@gwu.edu to request a Cayuse account

The George Washington University Web Single Sign-on

Log in to **George
Washington
University Cayuse
WebApp**

NetID

Password

Sign-on

Please do not bookmark this page!

The new single sign-on system works by authenticating your GW NetID and password and then redirecting you back to the system to which you are logging in. If you bookmark this page, the system will not receive all needed information and will display an error when you try to log in.

Additionally, to protect your personal information, please close all open browser windows and tabs when you log out.

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GW students, faculty, staff and alumni can access this service by using their GW NetIDs (the part of the e-mail address that precedes @gwu.edu) and corresponding passwords.

If you are a member of the GW community and do not have a NetID, you can get one by following the instructions on the [IT Support Center](#) website.

For further assistance accessing this service, please contact the IT Support Center at 202-994-GWIT (4948), ithelp@gwu.edu or <http://itsupport.gwu.edu>. Technology assistance is available through the IT Support Center 24 hours a day.

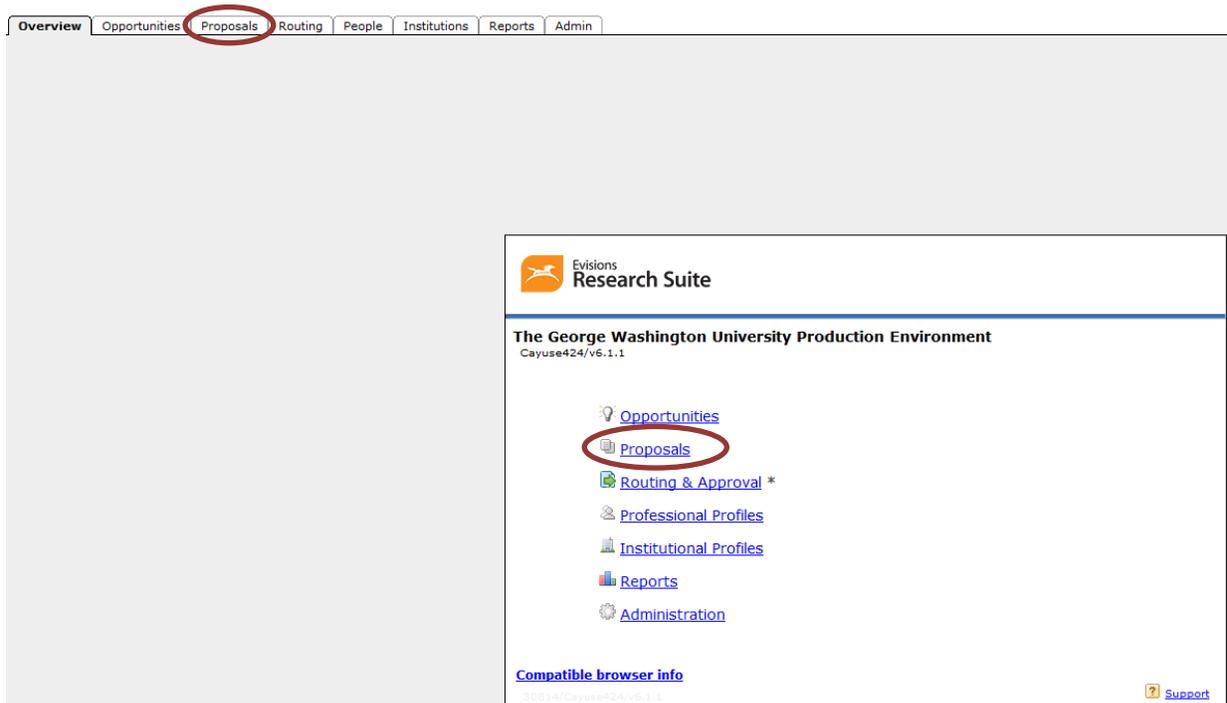
Reminder: GW will never ask for your password via e-mail.

[> Forgot your password?](#)

Starting a Proposal

In order to route a proposal using Cayuse, you first have to build a proposal.

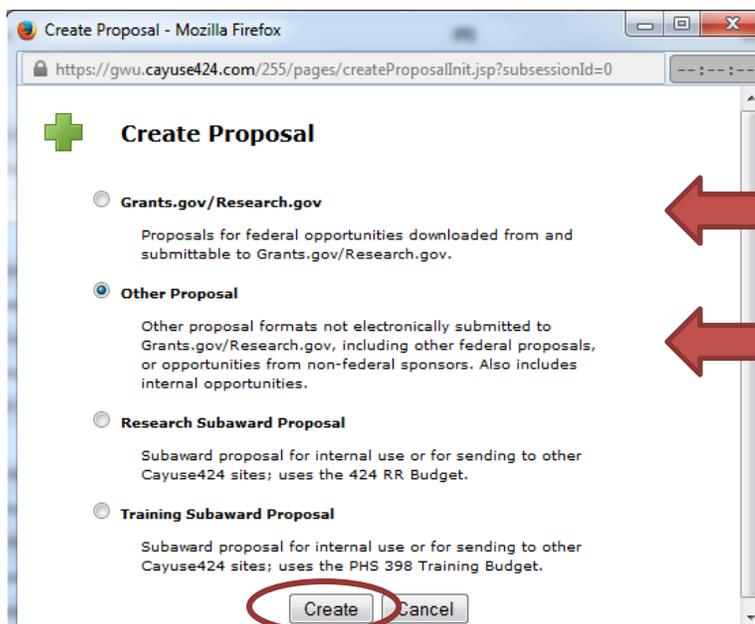
- Click on the **Proposals** hyperlink in the middle of the screen or the **Proposals** tab on the top left of the screen.



- Click on **+ Create Proposal** button in the upper right hand corner of the screen. This will create a new proposal:



- A pop-up screen will appear. In the pop-up screen, select a proposal type:
 - Grants.gov – Federal opportunities downloaded from and submittable to grants.gov
 - Other proposal – For those not submitted through grants.gov, including submissions to foundations
 - Subaward proposal – For internal use or for sending to other institutions that use Cayuse. For more information on this function, visit the Cayuse Support page related to [Creating Subawards](#).
- Click **Create**.



If you select Grants.gov/ Research.gov, follow the instructions on “Creating a grants.gov Proposal” on p.4 of this guide.

If you select Other Proposal, follow the instructions on “Creating an ‘Other’ Proposal,” starting on p.5 of this guide.

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Creating a grants.gov Proposal

GW uses Cayuse 424 to create, route and submit proposals to grants.gov. If you select Grants.gov/Research.gov when starting a proposal, you will be taken to a screen where you can select the opportunity you want to apply to with your proposal. For instructions related to selecting opportunities, visit the Cayuse Support page related to [Opportunities](#).

- Select the  next to the opportunity to which you plan to submit a proposal.
- Enter a **Proposal Name**. This is the way the system will identify your proposal. The Proposal Name is distinct from the title of your proposal. We suggest entering the Proposal Name as follows [PI Last Name]/[Sponsor] – [Short Proposal Title]. For example: Smith/NIH – Cold Atmospheric Plasma
- Search for and select the **Principal Investigator**
- Select the appropriate number of **Budget Periods** to indicate how many budget periods will be requested in the current proposal
- Enter the proposal due date. This will typically be dictated by the sponsor, but if you plan to submit the proposal earlier, then enter the date on which you plan to submit the proposal
- For Validation Type, select the agency that sponsors the opportunity you have selected. This allows agency-specific validation rules to be applied to the proposal.
- Click “Create Proposal”

Per sponsor instructions, complete all necessary proposal sections within Cayuse 424. For instructions, visit Cayuse’s [Navigating the Proposal](#) instructions

Once you are ready to initiate proposal routing, you will complete the Proposal Summary section of the proposal. This section is for internal purposes only. For instructions on completing this section and initiating routing, please go to the [Proposal Summary Information](#) section of this guide.

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Add Users (Permissions)

Proposal permissions in Cayuse424 allow you to control access to your proposals. For instructions, visit Cayuse’s [Permissions](#) instructions.

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Creating an “Other” Proposal

For all proposals that will not be submitted through grants.gov and therefore through Cayuse 424 (including NSF proposals submitted through Fastlane, NASA proposals through Nspires, foundation proposals, etc.)

+

Create New Proposal

Proposal Name: ?

[Show recent](#) | [Show all](#)

Principal Investigator:
Test, P I (new BIostatistics Center) / The George Washington University

Organization:

Default IDC Rate:

of Budget periods: 1 2 3 4 5 6 7 8 9 10

Due Date:

Validation Type:

Field Name	Instructions
Proposal Name	<p>This is the way the system will identify your proposal. The Proposal Name is distinct from the title of your proposal. We suggest entering the Proposal Name as follows [PI Last Name]/[Sponsor] – [Short Proposal Title].</p> <p style="text-align: center;">Example: Smith/NIH – Cold Atmospheric Plasma</p>
Principal Investigator	<p>You can either search for the Principal Investigator (PI) using the Search function or you can click Show all and select the PI from the alphabetized drop down menu.</p> <p><i>(Note: If the person that you want to designate as the PI is not listed in the drop down menu, it is likely because that person is not designated as a Principal Investigator in their eRA role within their Professional Profile. This must be corrected by the PI within their Cayuse Professional Profile). To check the eRA Role for you or for Co-Investigators, please click on instructions here.</i></p>
Organization	<p>Select The George Washington University from the drop-down. This typically pre-populates with the selection of a PI from GW.</p>
Default IDC Rate	<p>What you select here will not impact your proposal, since the budget is developed outside of Cayuse and uploaded as a document for review. We recommend you select the appropriate IDC rate for your school/institute, even if that is not the IDC rate that will be used in your proposal. If you leave this blank, you will be asked to confirm once you select</p>

“Create Proposal”

of Budget periods

Select the appropriate number to indicate how many Budget Periods will be requested in the current proposal.

Due Date

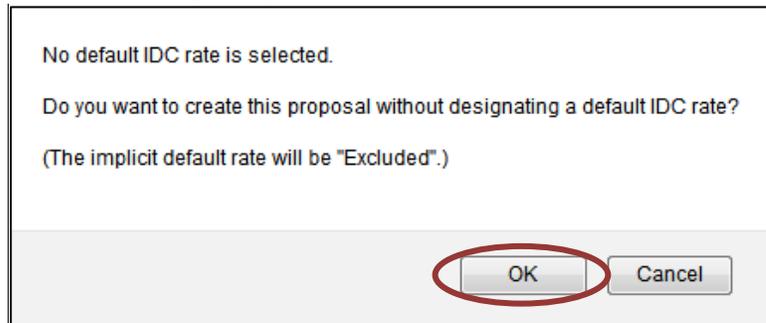
Enter the sponsor due date or, if you would like to submit your proposal early, the date on which you plan to submit your proposal.

Please note: If you select an earlier due date, this means you must back that date out five days to accompany OVPR's five-day rule

Validation Type

For all proposals that are not being submitted through Cayuse/grants.gov, “**Other-Minimal**”, even if it is a federal proposal

- Click the **Create Proposal** button at the bottom of the page.
- (if applicable) A pop-up will appear stating that you did not indicate an IDC rate. **Click OK.**



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Cayuse Navigation

- After a proposal has been created, you will be led to this page:

Proposal Summary

Proposal Number: [redacted] Proposal Title: Smith/NIH - Cold Atmospheric Plasma

Sponsor Deadline: 11/20/2015 Submission Method: Please Select...

Submission Date: [redacted] Submitted By: [redacted]

INVESTIGATOR DATA

PROJECT DIRECTOR / PRINCIPAL INVESTIGATOR CONTACT INFORMATION

Prefix: [redacted] * First Name: P Middle Name: [redacted] * Last Name: Test Suffix: [redacted]

Position/Title: Professor or Research Scientist Organization: The George Washington University

Department: new BIostatistics Center Division: OVPR

Street1: 123 K Street Street2: [redacted]

City: Washington County: [redacted]

State: District of Columbia Zip Code: 20052-0086

Country: United States of America Employee ID: [redacted]

Phone: 1234567890

Fax: [redacted]

Email: brp@cayuse.com

First Budget Period Effort
 Calendar Academic Summer

Status of PI: Please Select... Status Waiver Required? Yes No

Signed Intellectual Property Waiver Attached? Yes No

Signed Conflict of Interest Disclosure Attached? Yes No

Agency Certification Documentation Attached? Yes No

All attachments should be uploaded to the [Document Upload Area](#)

Error (0) / Warning (0) / Info (0) Other - Minimal Final Review

- The left sidebar will serve as a checklist for completion. You can click on each item for more information which will appear in the main frame to the right of this sidebar. Complete these sections and upload required documents.
- For all proposals, you must complete the **RR Key Persons** (to include, at minimum, all key persons from GW and if there is a co-investigator on the proposal), **Proposal Summary** (see below for required fields), **Documents** and **Routing & Approval** (COI form, multi-school routing form, technical narrative, budget & justification, etc.) all circled in the picture above.

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Proposal Summary Information

- On the left sidebar, under **Proposal Summary**, click **Summary**. You will see the form pictured above.
- Complete the fields listed below with the appropriate information. This is the proposal routing form for GW use only and needs to be completed for all proposals. *If the field is not listed, you are not required to enter information into the field.*

Cayuse Field	Information to provide
PROPOSAL SUMMARY – Please leave this section blank. OVPR will complete this section	
INVESTIGATOR DATA – If the PI has a profile in Cayuse, many of these fields will be auto-populated by Cayuse. Please confirm the accuracy of the data, especially the position/title and department/division names:	
First Name	
Last Name	

Position/Title	
Organization	
Department	This is the department/center/institute/office that should receive primary credit for the proposal
Division	Enter the school or division associated with the department
Street1	
Street2	
City	
State	
Zip Code	
Country	
Phone	
Email	
SPONSOR DATA	
Agency	The name of the agency (or sponsor) from whom GW is receiving funding. If this is a subcontract, the prime sponsor is entered in the next section
PROJECT DATA (All fields)	
Title of Project	Full Title of the Proposal
Subcontract	If this is a subcontract, select Yes and enter the name of the Prime Sponsor
Type of Proposal	Indicate whether the type of proposal is a Grant, Contract, Fellowship, Cooperative Agreement, or Other. If Other, please provide a description
Type of Agency	Select the Type of Agency. If Other (i.e., international), please select other and provide an explanation
Kind of Application	Select (New, Resubmission, Renewal, Continuation, Revision/supplemental). If there is an existing award associated with the proposal, enter the P/T/A number in the box for "Previous Grant # or Federal Identifier"
Type of Project	Select (Basic, Capital, Applied, Clinical Study/Trial, Training, Service, Instructional Research, Other). If Other, please provide a description
PROJECT ADMINISTRATION (No information required in this section)	
COMPLIANCE DATA (All fields)	
Are animal subjects used?	Indicate Yes or No (<i>If yes, please answer the following questions in the box</i>)
Are human subjects used?	Indicate Yes or No (<i>If yes, please answer the following questions in the box</i>)
Will Radioactive or Biohazard Materials be used?	Indicate Yes or No (<i>If yes, please note that if awarded, you will need to work with the Institutional Biosafety Committee to review protocols for the work</i>)
BUDGET DATA (All fields)	
Performance Dates – Begin & End Date	Performance Start/End Dates, First Budget Period Start/End Dates
Cost Sharing Information	Mandatory Committed/ Voluntary Committed. If either is marked "Yes," a Cost Sharing Request form should be attached in the Documents section of the Proposal Summary
Direct Cost/ Indirect Cost	For each Period (Totals Calculated). These numbers should come directly from the project budget that has been uploaded in the Documents section of the Proposal Summary
Export Controls (Optional)	Complete if relevant. (<i>For more information on what might trigger an Export Control consideration in research, please contact OVPR Export Control. Please note that marking 'yes' to any of these questions will not delay your proposal. It will be used to help GW in identifying awards that have export control considerations.</i>)
Comments and Explanations (Optional)	Provide any special instructions or information about the proposal

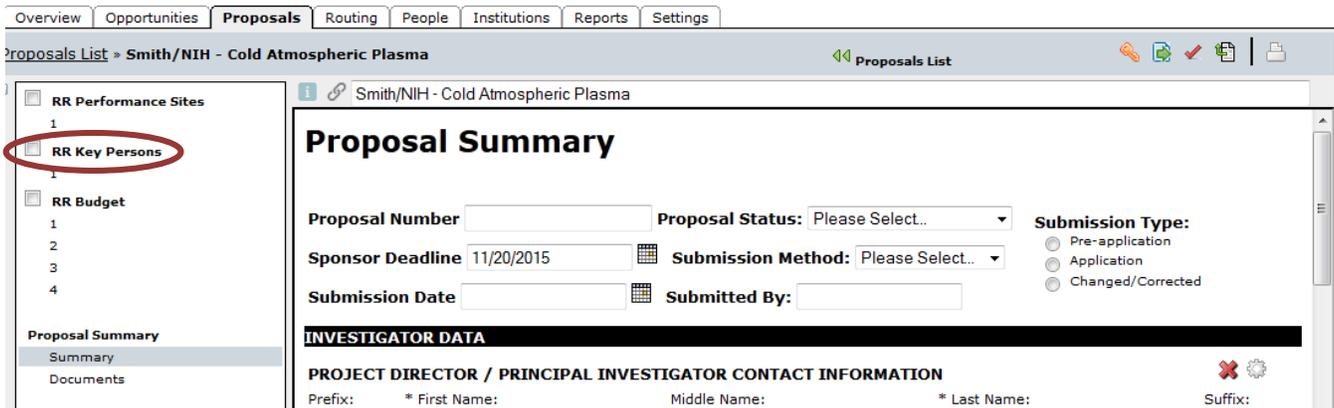
- This information is automatically saved as you enter it so there is no option or need to manually save it.

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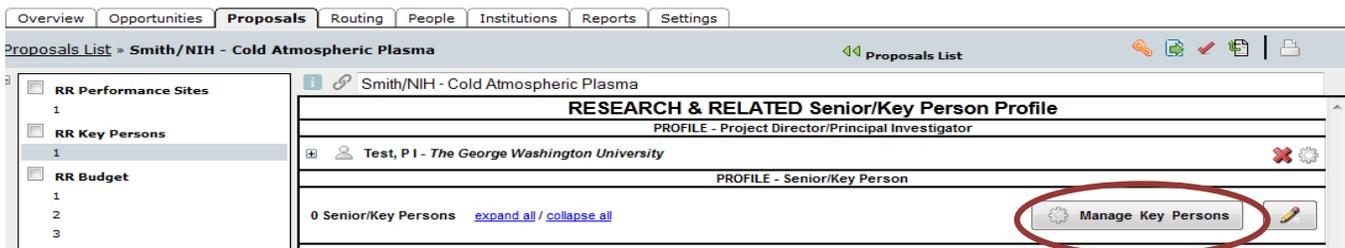
Adding Key Personnel

Under RR Key Persons, add any Co-Investigators and/or other Key Personnel who are part of the project. It is especially important to include those from GW. *If the Key Person you want to add to the application does not appear in the menu, the person will need to request a Cayuse account by e-mailing askovpr@gwu.edu.*

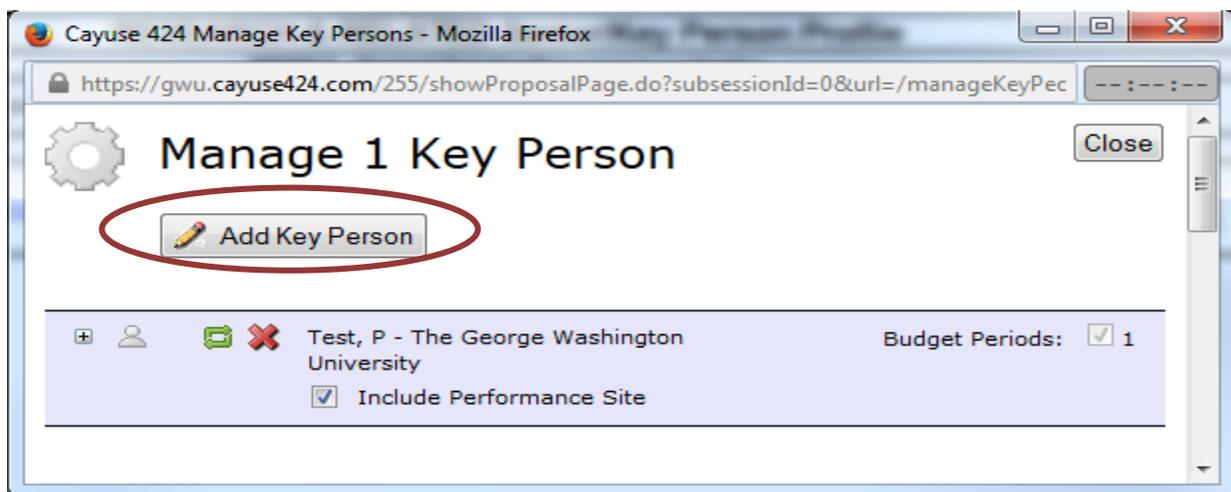
- Click on the **RR Key Persons** section in the left menu screen of the application
- The Principal Investigator will automatically be added to the Key Personnel section. Information from the PI's Professional Profile will populate in this section.



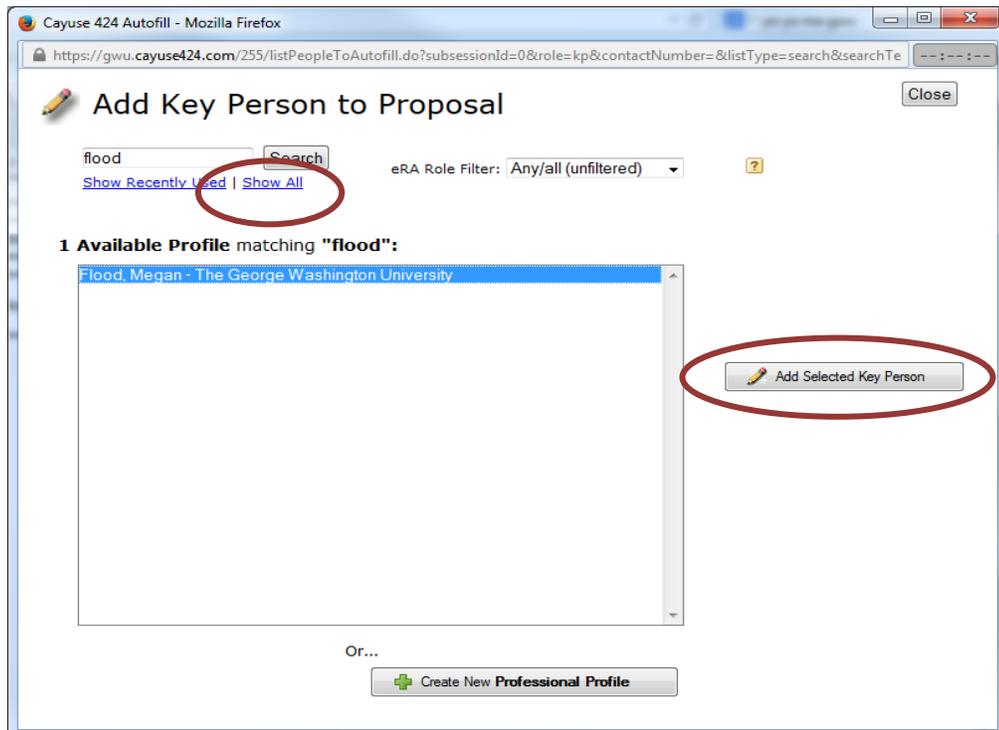
- Click the **Manage Key Persons** button on the right of the page:
Your screen will now look like this:



- Click **Manage Key Persons**
- A pop-up menu will appear. Click **Add Key Person** or on the pencil  in the Manage Key Persons dialog.



- The screen below will appear. You can either search for the Co-I using the **Search** function OR you can click **Show all** and select the individual from the alphabetized drop down menu.

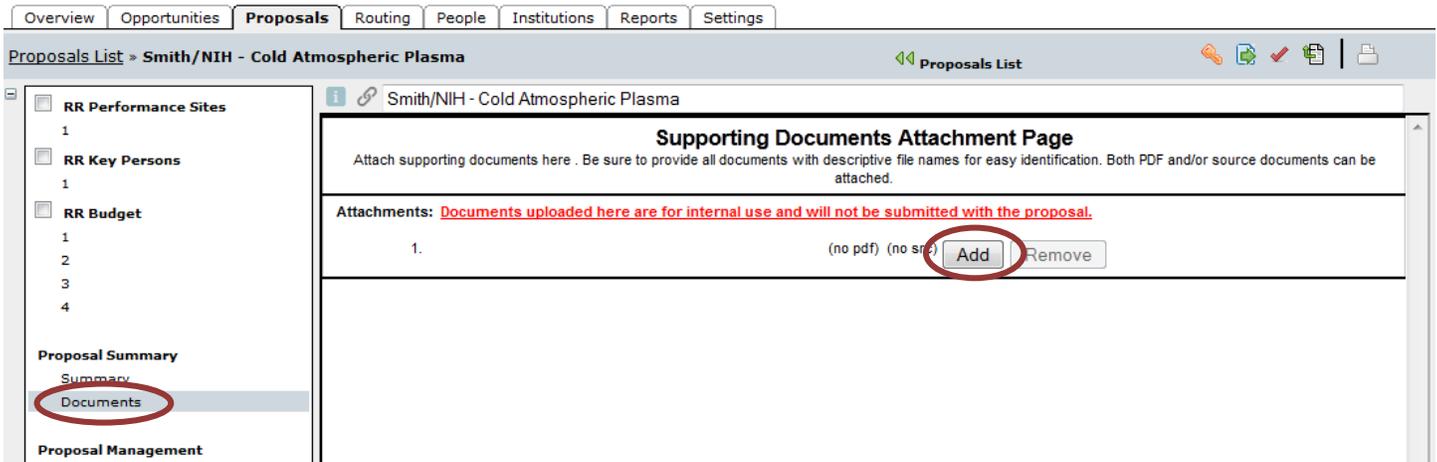


- If that person has a profile in Cayuse 424, they will appear in the list. Select their name and click “Add Selected Key Person.” If they do not appear and are a GW employee, please e-mail askovpr@gwu.edu to request that they be added. If they are from outside GW, you may opt to create a professional profile for that person and add them.
- Once selected, choose a **role** for that person. If ‘Other’ is selected, enter the appropriate role in the box.
- Click the ‘Close’ box.
- If you would like to add more information about the Key Person, you can expand their profile within your proposal by clicking the **+** next to their name.
- Click on the appropriate name to select the person from the menu provided and click the **Add Selected Key Person** button:
- Once you’re done **adding Co-I’s**, click **close** in the top right hand corner.
- If you need to add additional Co-I’s, repeat the steps starting [here](#).

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Attaching Documents

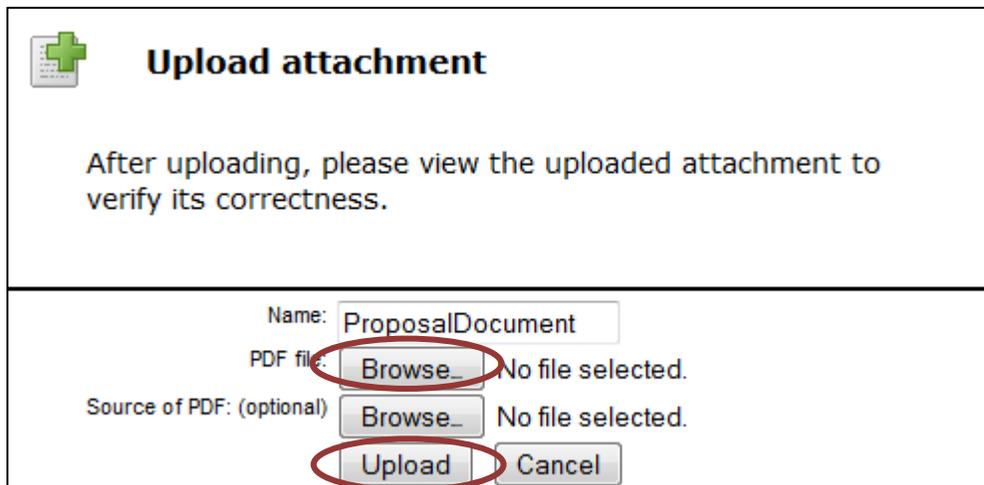
- Click on the **Documents** section in the left menu screen – The **Supporting Documents Attachment** Screen will appear.
- The **Documents** section under **Proposal Summary** is for:
- Internal documents for all proposals:
 1. Conflict of Interest and Financial Disclosures Form (please note, updated version available)
 2. Budget in Excel
 3. Budget Justification
 4. Copy of Solicitation
 5. If applicable: Multi-School Routing Form(s), Subrecipient Commitment form(s) with supporting documentation, Cost Share Form, Sponsor documents/communications
- For proposals that are not grants.gov, please be sure to also include a PDF of sponsor package, including Scope of Work or narrative and any other documentation required by the sponsor.



Please disregard the red text. This text is present for *all* proposals submitted through Cayuse and it pertains to proposals submitted to external agencies.

Documents uploaded here WILL BE viewable by all GW personnel reviewing the proposal.

- Click the **Add** button in the attachment section.
- A pop-up menu will appear:



- Click the **Browse** button to browse for the PDF document you want to attach for **PDF file** or **Source of PDF** for all other documents.
- After **Source Files** is attached, please rename each component according to the naming convention below. If this is not done after attaching each Source File, the Name will default to the original file name confusing the reviewer.

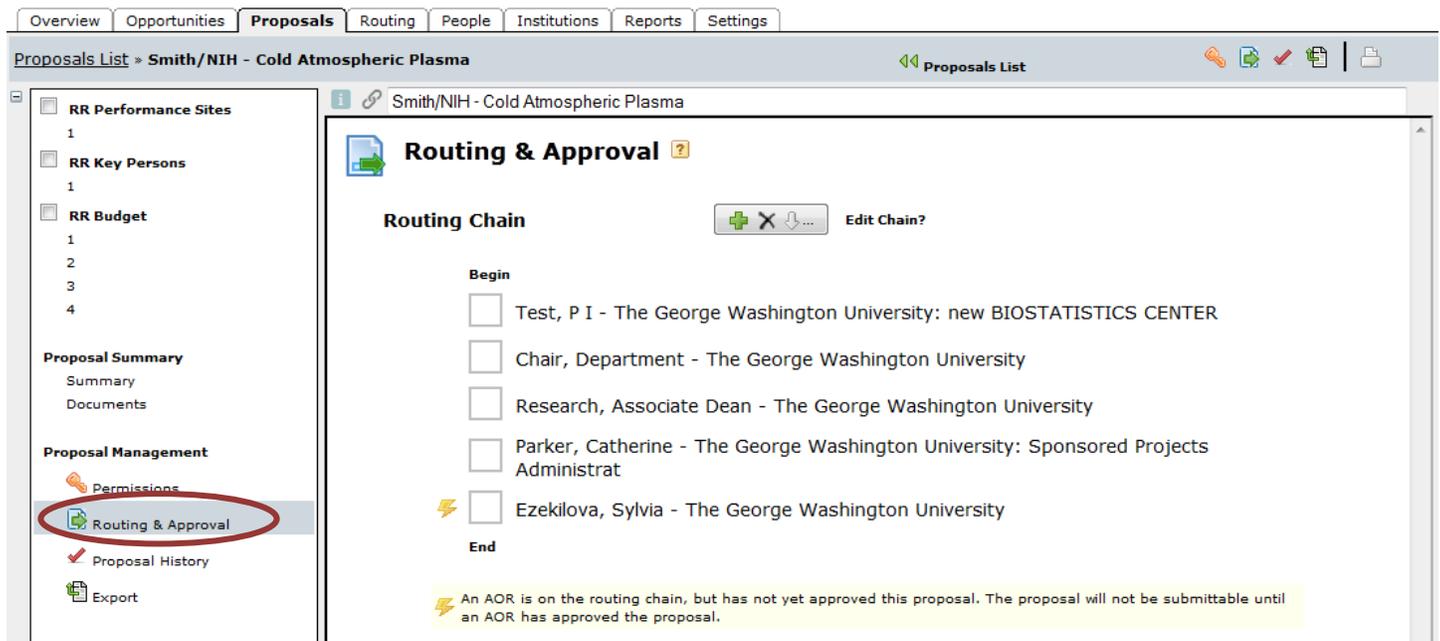
Proposal Component	Naming Convention
Conflict of Interest and Financial Disclosure Form	COI.pdf
Budget in Excel	Budget.xls
Budget Justification	BudgetJustification.pdf
Copy of Solicitation	Solicitation.pdf
Multi-School Routing Form/ Subrecipient Commitment Form (with supporting documentation)	MultiSchoolRouting.pdf
Sponsor Package (if not grants.gov proposals)	SponsorPackage.pdf

- Click **Upload** and repeat as necessary.
- After all necessary documents are added, this section is complete.

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Establishing a Routing Chain

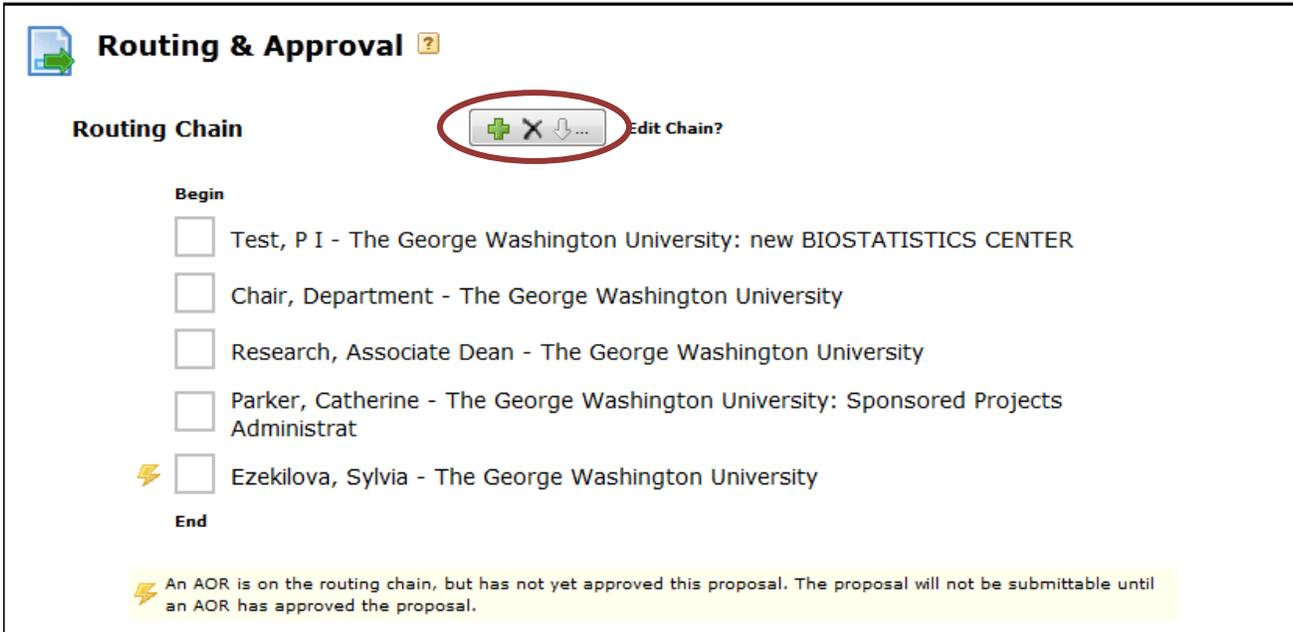
- On the left sidebar, under **Proposal Management**, click  **Routing & Approval**. This will start the process of establishing a **Routing Chain**. The routing queue is automatically set by OVPR in conjunction with your school and starts with the PI, who can approve by checking the box next to her/his name. The proposal will automatically go to the next person.
- *Once someone in the routing chain has approved the proposal, that person will not be able to edit the forms (e.g., the SF424) or the budget information. Uploaded documents (such as the narrative) may be edited.*



The screenshot displays the 'Routing & Approval' interface within the OVPR system. The top navigation bar includes 'Overview', 'Opportunities', 'Proposals', 'Routing', 'People', 'Institutions', 'Reports', and 'Settings'. The current page is titled 'Proposals List > Smith/NIH - Cold Atmospheric Plasma'. The left sidebar shows a tree view with 'RR Performance Sites', 'RR Key Persons', 'RR Budget', 'Proposal Summary', and 'Proposal Management'. Under 'Proposal Management', 'Routing & Approval' is highlighted with a red circle. The main content area shows the 'Routing Chain' for the proposal. It includes a 'Begin' section with a list of individuals to be approved, each with a checkbox: 'Test, P I - The George Washington University: new BIostatistics Center', 'Chair, Department - The George Washington University', 'Research, Associate Dean - The George Washington University', 'Parker, Catherine - The George Washington University: Sponsored Projects Administrat', and 'Ezekilova, Sylvia - The George Washington University'. There is also an 'End' section. A yellow warning message at the bottom states: 'An AOR is on the routing chain, but has not yet approved this proposal. The proposal will not be submittable until an AOR has approved the proposal.'

- The order of individuals in the picture above is an example of the proper routing chain for an external proposal.
- The routing chain can be edited to add additional persons (i.e., a Co-Investigator, Finance Director, etc.). You are also able to delete individuals, but this should only be done with valid reason approved by the Associate Dean for Research and/or OVPR.

To Edit your Routing Chain



Routing & Approval ?

Routing Chain ⊕ ✕ ↓ ... Edit Chain?

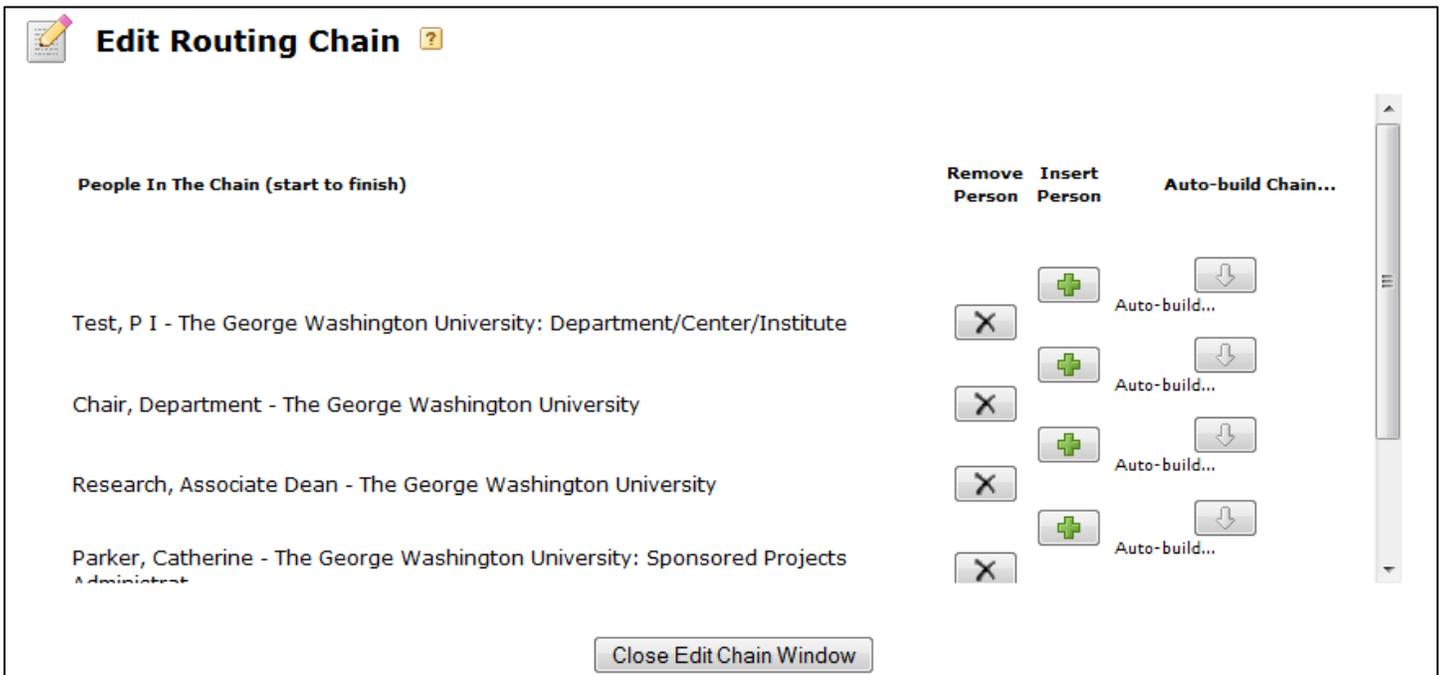
Begin

- Test, P I - The George Washington University: new BIOSTATISTICS CENTER
- Chair, Department - The George Washington University
- Research, Associate Dean - The George Washington University
- Parker, Catherine - The George Washington University: Sponsored Projects Administrat
- Ezekilova, Sylvia - The George Washington University

End

An AOR is on the routing chain, but has not yet approved this proposal. The proposal will not be submittable until an AOR has approved the proposal.

- Click the button above the Routing Chain, circled above.
- This pop-up will appear:



Edit Routing Chain ?

People In The Chain (start to finish)

	Remove Person	Insert Person	Auto-build Chain...
Test, P I - The George Washington University: Department/Center/Institute	✕	⊕	Auto-build... ↓
Chair, Department - The George Washington University	✕	⊕	Auto-build... ↓
Research, Associate Dean - The George Washington University	✕	⊕	Auto-build... ↓
Parker, Catherine - The George Washington University: Sponsored Projects Administrat	✕	⊕	Auto-build... ↓

Close Edit Chain Window

- Clicking the 'x' will delete someone from the chain. Clicking the ⊕ will provide you the option to add someone to the chain. This person must have a valid Cayuse account to be added.
- Click **Close Edit Chain Window**.

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Initializing Routing

- Once the Routing Chain is completed, **it is up to the PI to initiate the routing process.**
- This is started by clicking the box adjacent to his or her name.
- *Once routing is initialized, your proposal cannot be amended. It can be viewed only as “read-only.”*

Routing & Approval

Routing Chain



Begin



Test P I - The George Washington University: Department Name



Chair, Department - The George Washington University



Research, Associate Dean - The George Washington University



Parker, Catherine - The George Washington University: Sponsored Projects
Administrat



Ezekilova, Sylvia - The George Washington University

End

 An AOR is on the routing chain, but has not yet approved this proposal. The proposal will not be submittable until an AOR has approved the proposal.

- Whenever a proposal is initiated or approved by someone on the routing chain, Cayuse424 will prompt for approval of the action.
- Enter any comments related to the proposal that is pertinent for all reviewing it.
- Click **Approve**:



The dialog box titled "Action: Approve" contains a "Comments:" label above a text input field. Below the input field are two buttons: "Approve" and "Cancel". The "Approve" button is circled in red.

- Once this is done, the routing and approval process has commenced, and an e-mail is sent to the next person in the routing chain, notifying them that their action is required. Cayuse sends only one e-mail.
- **Please exit out of the proposal. This is required so that the routing can be officially started.**

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Recalling a Proposal

At any time during the routing, the PI or other approvers can “recall” the proposal by unchecking the box next to his or her name. This resets the entire routing process.

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Proposal Submission

Once the proposal has been fully reviewed and approved, OVPR will submit your proposal through Cayuse or other electronic system (e.g., NSF Fastlane, NASA Nspires). If the Opportunity is not supported by an electronic system, OVPR will notify you when the proposal has been approved for submission to the sponsor.

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