

# Cayuse Frequently Asked Questions

## General

- What is Cayuse?
- Is Cayuse *just* for NIH electronic Grants.gov submissions?
- Am I REQUIRED to use Cayuse for my GT Grants.gov application?
- Can I use Cayuse right now, for my next Grants.gov submission? How do I initially access Cayuse?
- Who do I contact if I encounter login issues?

## Proposal Development

- What if I cannot find my proposal in Cayuse?
- Where and when do I add the Contracting Officer/AOR to the proposal?
- How do I update information in my Professional Profile?
- How do I add a Senior/Key Person or Organization who is *not* from GT, and whose *institution is not listed* on the current list of non-GT institutions in Cayuse?
- What if I don't know a subawardee organization's DUNS Number?
- What are the various ways to handle non-GT employee consultants on an NIH application in Cayuse?
- What if, at the time of application, I don't know who the consultant will be?
- How do I add Key Persons to a budget without giving them effort on the budget?
- How do I include a detailed budget for my records when the sponsor is requesting a modular budget?
- How do I include a cost of living increase in salary for personnel listed on the proposal?
- I am having trouble with the indirect cost rate; the wrong rate is auto-filled in the budget information. How do I know which rate to initially select?
- When I compare the PDF file generated in Cayuse with the PDF I see on the NIH Commons, they are not identical - The Cayuse PDF has more forms/pages than the NIH Commons version. What's going on?
- How do I create Portable Document Format (PDF) files for Cayuse attachments?
- Why and how would I "Copy/Transform" a Cayuse proposal?
- Will I receive email notifications from Cayuse?
- Once I create the proposal in Cayuse, am I able to modify the submission date?
- Why does my application have errors that contradict specific instructions?
- What do the error, warning, and info notices at the bottom mean?
- How does Grants.gov system maintenance affect my submissions?

## Access/Permissions

- There appears to be a "lock" on my Cayuse proposal. How can I get rid of it?
- Can two or more people simultaneously work on a proposal?
- How can a PI delegate permissions in Cayuse, allowing others to view and edit the PI's proposal and professional profile?
- What do the various permissions within Cayuse mean?

## Additional Help or Training Information

- How can I find additional training on Cayuse?
- Who can I contact for further help?

# Cayuse Frequently Asked Questions

## General

### What is Cayuse?

[Cayuse](#) is a commercially available "system-to-system" alternative to the [Grants.gov](#) application forms previously used at Georgia Tech. Instead of downloading the PDF packages from Grants.gov, Cayuse users log in to Cayuse and create their own application by selecting the specific agency announcement and using the GT Cayuse interface. Cayuse offers many user-friendly features, including:

- Error checking, using NIH Commons (or other federal agency) standards, PRIOR TO submission;
- Creating a PDF file of the ENTIRE application (including attachments) for review PRIOR TO submission;
- Storage of PI biosketches and profiles for automatic loading into the application;
- Excellent budget support and error checking;
- Automatic loading of GT institutional grant information (names, contact info, etc.) into the proposal;
- Convenient sharing and delegation of proposal access for viewing and editing by investigators and administrators.

### Is Cayuse *just* for NIH electronic Grants.gov submissions?

No! Cayuse can be used for electronic Grants.gov submissions to federal agencies that provide Adobe forms for the submission process. If the Adobe Grants.gov form exists for the federal funding opportunity, it will also be available in Cayuse.

### Am I REQUIRED to use Cayuse for my GT Grants.gov application?

Yes. Cayuse is required for all GT Grants.gov applications (except for NSF) that provide Adobe forms for the submission process (i.e. NIH, DOD, CDC, USDA, AHRQ, etc.) unless there is some technical problem that prevents the use of Cayuse for your particular application.

### Can I use Cayuse right now, for my next Grants.gov submission? How do I initially access Cayuse?

Yes. Individuals should contact [training@osp.gatech.edu](mailto:training@osp.gatech.edu) to request a GTRC or GTARC profile creation. The OSP team will need the **GT Username** (ex. JDoe45), and the **role requested** (ex. PI/Co-PI, Assistant) to initially create a profile for an individual in Cayuse.

Note: The team will verify eligibility using the [PI/PD Eligibility Policy](#), as well as the official [List of Faculty Titles](#) from the Office of the Provost.

Once the profile is created, you would access Cayuse via the Apps button on [GTCrossroads](#). You will use your GT Account and Password to log in (you may be prompted to use the multi-factored login process if you were not already logged in).

### Who do I contact if I encounter login issues?

Please contact [training@osp.gatech.edu](mailto:training@osp.gatech.edu) for assistance.

# Cayuse Frequently Asked Questions

## Proposal Development

### **What if I cannot find my proposal in Cayuse?**

If you cannot find your specific Grants.gov application package in Cayuse, use the blue 'Download Opportunities' button on the top right to search for and import the appropriate package (ensure it is the correct competition title and package number).

If the package has a technical problem that is preventing the completion of your application, please contact the Office of Sponsored Programs to report the problem. **Do not complete a Grants.gov (PDF) application outside of GT Cayuse without first obtaining written (e.g., e-mail) permission from the GT Office of Sponsored Programs.** In all but a few cases, a Cayuse solution is available.

For all NSF (National Science Foundation) proposals at GT, NSF FastLane or Research.gov should be used until further notice, even if an NSF Cayuse/Grants.gov alternative is available.

### **Where and when do I add the Contracting Officer/AOR to the proposal?**

You should click into 'Proposal Permissions' (the aforementioned orange key icon located on the top right), as soon as you initially open the proposal. You will then want to make sure you add any other individuals and give appropriate access rights, **ensuring that the AOR/Contracting Officer has submit privileges. You will also want to ensure they are in the Routing and Approval Chain, as the final member in the chain.**

### **How do I update information in my Professional Profile?**

Go to the People Tab in Cayuse, search for and select your name. This information is auto-filled into the appropriate forms within the proposal. It is recommended that you occasionally review your Professional Profile to verify accuracy. Agency-specific data such as NIH Commons ID, NASA NSPIRES ID, and NSF Degree Types can also be included for use in proposals. **To minimize potential delays in processing, ensure that your profile is as up-to-date and complete as possible.**

### **How do I add a Senior/Key Person or Organization who is *not* from GT, and whose institution is not listed on the current list of non-GT institutions in Cayuse?**

If the key person from the other university is a PI, then the university and the key person will need a profile in Cayuse. Therefore, send the below information to [training@osp.gatech.edu](mailto:training@osp.gatech.edu) as early as possible to allow sufficient time to process this request:

#### **Key Person:**

- Name
- Role
- Email address

#### **University/Entity:**

- Name

# Cayuse Frequently Asked Questions

- Address (optional)
- DUNS #
- Congressional District (domestic entity only)
- Fringe Rate
- IDC Rate (MTDC or TDC)

NOTE: The key person, nor his/her university will **not** have access to the GT Cayuse platform.

## What if I don't know a subawardee organization's DUNS Number?

Please request the DUNS number directly from the subaward entity. You may be able to find this information through the [Federal Demonstration Partnership Clearinghouse](#).

## What are the various ways to handle non-GT employee consultants on an NIH application in Cayuse?

### Senior/Key Personnel

Unless otherwise specified in an agency announcement, Senior/Key Personnel are defined as individuals who contribute in a substantive, meaningful way to the scientific development or execution of the project, whether or not salaries are requested.

Senior/Key Person effort is generally defined and measurable. Consultants should be included if they meet this definition.

### Other Significant Contributors (OSCs)

Unless otherwise specified in an agency announcement, OSCs are individuals who will contribute to the scientific development or execution of the project, but are not committing any defined effort that can be measured in person-months; these individuals are typically presented at an effort of zero person months or as needed. Consultants should be listed as OSCs if they meet this definition. Note that OSCs should be listed after all Senior/Key Persons in the "RR Senior/Key Personnel form.

#### Biosketch

The non-GT Consultant biosketch is attached to the RR KEY PERSON Professional Profile.

#### Letter of Support

Provide a letter of support from the consultant, including the rate/charges for services, as Research Plan/Attachment 14, Letters of Support.

### Other Consultants

It is not necessary to list a consultant as a Senior/Key Personnel or other significant contributor. Some consultants may not meet the definition of either. In such cases, consultants are handled as explained below.

#### Costs

Consultant costs for a Non-GT Employee Consultant who is not considered a Senior/Key Personnel or an OSC should be budgeted under Section F.Other Direct Costs/3.Consultant Services if using the R&R Detailed Budget form, or budgeted into a module if using the PHS 398 Modular Budget form.

# Cayuse Frequently Asked Questions

## **Biosketch**

A biosketch is not required and shouldn't be included if the consultant isn't listed as a Senior/Key Person or an OSC.

## **Letter of Support**

Provide a letter of support from the consultant, including the rate/charges for services, as Research Plan/Attachment 14, Letters of Support.

## **What if, at the time of application, I don't know who the consultant will be?**

If the consultant is to be named later, enter the estimated consultant costs in F. Other Direct Costs/3.Consultant Services within the "detailed" RR Budget or as part of a module for the PHS 398 Modular Budget. In the budget justification, describe the type of consulting work you are going to need.

## **How do I add Key Persons to a budget without giving them effort on the budget?**

In the 'Manage Key Persons section', select the key person's role as "Other (Specify)" and then specified as "Other Significant Contributor".

## **How do I include a detailed budget for my records when the sponsor is requesting a modular budget?**

Enter all appropriate budget information on the detailed budget pages. Make sure the R&R budget pages are unchecked on the proposal navigation page. The budget information will be available, but will not be converted into the PDF that is submitted to the NIH.

## **How do I include a cost of living increase in salary for personnel listed on the proposal?**

The Replicate/Escalate staircase in Cayuse makes it easy to replicate and escalate detailed budgets. Use "Escalate" to increase budget line items by a specific percentage across several budget periods. Use "Replicate" to copy selected Budget Categories from one budget period to another at the same rate. The Replicate/Escalate staircase also appears on the Manage Key Person window. You can access this window by clicking the gear icon to the right of any Senior/Key Person budget line. "Replicate" and "Escalate" in this context affect only the budget numbers for that specific person's salary.

## **I am having trouble with the indirect cost rate; the wrong rate is auto-filled in the budget information. How do I know which rate to initially select?**

Please be sure to choose the appropriate indirect cost rate when creating your proposal. You can locate current Facilities & Administrative Rates on the [Office of Sponsored Programs](#) website. You can also change the indirect cost rate in the budget pages by using the dropdown menu under each section of the budget, which will dictate what rate will be applied to those costs.

# Cayuse Frequently Asked Questions

## **When I compare the PDF file generated in Cayuse with the PDF I see on the NIH Commons, they are not identical - The Cayuse PDF has more forms/pages than the NIH Commons version. What's going on?**

This is not a glitch. The Cayuse PDF is never 100% identical to what the funding agency reviewer will see. If you generate a comprehensive PDF in Cayuse (click on the Cayuse printer icon and select *all forms and attachments*) the PDF will include some forms that don't actually transmit to the funding agency. For example, the Cayuse application offers both the modular budget form and the detailed budget form, but the transmitted application should include only one or the other - whichever the applicant has selected. In addition, the Cayuse PDF will not contain a table of contents, nor will it show headers and footers, both of which are generated in the application PDF you'll find in the Commons.

Note that, compared to the Adobe Grants.gov forms - which do not permit you to generate a PDF of the entire application/attachments - the Cayuse PDF feature is extremely useful and convenient. Applicants can easily create a single, comprehensive PDF file, including all forms and PDF attachments.

*Prior to submission* applicants should always use the Cayuse PDF to check for typographical errors, wrong attachments, poorly placed figures, and other content errors. Such errors cannot be fixed once applications have been submitted.

*Following submission*, applicants should always check the proposal as it appears directly on the NIH Commons. This is the only way to see exactly what the NIH reviewers will see. We can fix "transmission errors" that are discovered. A "transmission error" means that what we sent to NIH looked 100% correct, but what ended up on the NIH Commons contains errors, so something was garbled in the submission process itself. Note: Missing a typographical error is not a "transmission error" if the typographical error is in the original material we submitted.

## **How do I create Portable Document Format (PDF) files for Cayuse attachments?**

There are various ways to convert a document to pdf format. The most common method for converting a document to PDF is described below. (Because steps might vary among PDF generators, please follow the instructions provided with the PDF generator you selected).

1. Open the document you wish to convert (i.e., in MS Word if this is an MS Word document).
2. Select "File - Print" from the menu. A "Print" dialog box will appear.
3. Click on the drop-down list arrow for the printer "Name" field. A list of printers will appear.
4. Select the printer listed as "Acrobat PDF" (or other pdf-generator). Click on "Ok."
5. A "Save PDF File As" dialog box appears. Type in a name for the PDF file and click "Save." The conversion will begin. When the process is complete the pdf file will open in a separate window, ready for you to view.

CAUTION: When naming your PDF file, ensure the file name has no extraneous characters e.g., no spaces, brackets, hyphens, underscores, commas, quotes, etc.

# Cayuse Frequently Asked Questions

## Why and how would I "Copy/Transform" a Cayuse proposal?

The Cayuse "Copy/Transform" function is extremely useful if you are resubmitting a previously unfunded application, redirecting an application in progress to a different funding mechanism, or, having inadvertently used the wrong set of forms, transferring an in-progress application to a different application packet. By copying/transforming an application, you transfer existing information to a new application and there is no need to start from scratch.

"Transforming" is simple, taking just a few seconds:

1. From your Cayuse proposal listing, identify the existing proposal you wish to copy/transform.
2. To the far right of that title, click the icon resembling a sheet of paper with green shadow, which is the copy/transform function.
3. Under the Copy Proposal menu that appears, select the new funding opportunity of interest.
4. A new "copy" of that proposal will appear in your Cayuse proposal list.

## Will I receive email notifications from Cayuse?

Email notifications are sent to the Lead PI, Research Team, and all Approvers when an electronic proposal is submitted in Cayuse for routing and approvals. Additionally, the proposal creator and Lead PI will receive emails when proposals are approved or if additional information is needed for processing.

## Once I create the proposal in Cayuse, am I able to modify the submission date?

Yes; you are able to update the submission due date using the Proposal Summary tab; Click into the tab, then you can update the sponsor deadline.

## Why does my application have errors that contradict specific instructions?

It is very important to refer to the proposal solicitation or RFP as the primary source for proposal preparation instructions. Usually, they will provide additional information regarding how to complete the application. While Cayuse usually applies the appropriate validations automatically, there are sometimes late changes in opportunity rules that require a manual change in the proposal's validation setting. If there is a contradicting error refer to the RFP and be sure to complete the application as stated in the instruction or grant proposal guide.

## What do the error, warning, and info notices at the bottom mean?

**Errors** in Cayuse reflect problems that will impose a hard-stop rejection at Grants.gov or the funding agency. Agency errors display the agency name in brackets to the right of the field in question (e.g., [Research Plan 2.2][NIH]) if applicable. To ensure that your submission is successful, Cayuse runs a final check on Grants.gov and agency validations before you submit a proposal. Actual agency validations may vary depending on the federal opportunity instructions. **When it comes to agency-specific errors, the**

# Cayuse Frequently Asked Questions

**current federal opportunity instructions supersede Cayuse error messages.** Think of errors like stop signs.

**Warnings** pertain to agency validations or may serve as notices from Cayuse regarding missing attachments. For example, Cayuse does not require a budget justification; however, Cayuse displays a warning, because a budget justification is a common attachment. Warnings do not prevent proposals from being submitted or from being reviewed. Think of warnings like yield signs.

**Info tips** are Cayuse recommendations. Forgetting to enter a Sponsor Deadline, for example, prevents the deadline from appearing in your list of proposals. Cayuse will alert you when this happens. Info messages are specific to the software and do not prevent proposals from being submitted or from being reviewed.

It is highly suggested to take the time to review and correct the errors, warnings, and take note of the info tips where applicable. Also note, errors will continue to decrease as you continue to populate the forms with the necessary information.

## How does Grants.gov system maintenance affect my submissions?

During Grants.gov maintenance, Cayuse users will not be able to submit proposals to a sponsor or download new funding opportunities. However, you can still work on applications in Proposals once the opportunity has been downloaded. If by chance the opportunity has timed out or the expiration date has passed please be sure to download a new opportunity that has the correct submission deadline.

## Access/Permissions

### There appears to be a "lock" on my Cayuse proposal. How can I get rid of it?

This is probably caused by an "improper exit" from Cayuse by a user who was editing the proposal. Cayuse users **MUST** use the blue "Sign Out" link in the upper right corner of the screen when exiting Cayuse. If a user simply closes the browser window without signing out, the Cayuse session remains active and the proposal will remain locked by that user. To unlock the proposal, the user who left Cayuse without clicking the "Sign Out" link must log back into Cayuse and re-exit correctly, by clicking the "Sign Out" icon. If this doesn't work, contact [training@osp.gatech.edu](mailto:training@osp.gatech.edu) for assistance.

### Can two or more people simultaneously work on a proposal?

The system allows one user at a time to work on Proposals. However, users may simultaneously view the proposal.

### How can a PI delegate permissions in Cayuse, allowing others to view and edit the PI's proposal and professional profile?

If a PI wants another Cayuse user to have full rights to view and edit all of his/her Cayuse applications:

# Cayuse Frequently Asked Questions

The PI can name that user a *Cayuse Delegate* by opening the PI's Professional Profile in Cayuse and clicking on the *Routing Profile* button. A Cayuse PI Delegate then has read, edit, change permissions, and other rights to all proposals under that specific PI.

The PI (or PI Delegate) can authorize any number of Cayuse Delegates by going to the PI's Professional Profile in Cayuse and clicking on the Routing Profile button. **If the person you wish to select as a Cayuse Delegate is not on the list, e-mail [training@osp.gatech.edu](mailto:training@osp.gatech.edu) with the GT username and the role you are requesting.** OSP staff will be more than happy to assist!

When a Cayuse proposal is started and a PI selected from the GT Cayuse PI list, that PI and all of that PI's Cayuse Delegates will automatically have access and full rights to view, list, read, write, change/add permissions, route, etc. that proposal.

PI Delegates will have full rights to each proposal, but will not automatically have rights to subaward information within that proposal or to the information contained in the PI's Professional Profile in Cayuse. Such rights can be specifically assigned to each subaward and to the PI profile using the "Orange Key Icon" Permissions list, as described in the section below.

## "Orange Key Icon" Permission Rights

The "Orange Key Icon" allows the PI to tailor access rights and permissions in relation to his/her proposals. Using the Orange Key, the PI can limit user access to a single proposal, and can delegate only certain permissions within that proposal.

The "Orange Key Icon" also appears in the upper right corner of every Cayuse Professional Profile. To edit a PI's professional profile, a Cayuse user (including the PI's Cayuse Delegates) must be included in the "Orange Key Icon" list of permissions. The PI's Cayuse delegates do not have automatic access to the PI's Professional Profile. Likewise, PIs must use the Orange Key Icon to authorize delegates - even PI Delegates - to access any subawards associated with a particular proposal. Permissions must be individually assigned, in relation to each subaward.

## What do the various permissions within Cayuse mean?

List	Allows the "User" to see the proposal in a list of proposals
Read	Allows the "User" to read the contents of a proposal
Write	Allows the ability to add, change or delete information on a proposal
Attach	Allows the "User" the ability to attach documents to the proposal
Break Lock	Allows the "User" to gain write access while another user is in the proposal
Delete	Allows the "User" to delete a proposal
Print	Allows the "User" to print the proposal
Change Permissions	Allows the "User" to change security permissions on a proposal
Add User	Allows the "User" to add other users to the proposal
Remove User	Allows the "User" to delete other users from the proposal
Submit	Allows the "User" to submit a proposal to Grants.gov

By default, the creator of a proposal and the System Administrators have access to the proposal.

# Cayuse Frequently Asked Questions

## Additional Help or Training Information

### **How can I find additional training on Cayuse?**

Georgia Tech's Office of Sponsored Programs offers training sessions on Cayuse 424. Check our [training calendar](#) for details.

### **Who can I contact for further help?**

Contact [training@osp.gatech.edu](mailto:training@osp.gatech.edu) with additional questions or concerns.

**Back to Top**