Cayuse

Presented by:
Office of Sponsored Programs
and
Office of Information Technology
Cayuse

Project Background

- Cayuse is a fast, easy-to-use Web application created specifically to simplify the creation, review, approval, and electronic submission of grant proposals.
Basic Concepts

• Routing is designed to be incremental and assumes that:
  o Participants know where a proposal should go next.
  o The actual route taken is likely to vary by proposal and therefore must be specified for each proposal.
Routing Configuration: Delegates

• If a reviewer has named delegate(s) in the **Routing Profile** of their **Professional Profiles**, the following rules apply:
  o Delegates receive the same notifications as the Primary.
  o Delegates can perform the same actions as the Primary.
  o Multiple Delegates are allowed.
  o Delegates have to establish their own pecking order.
  o Delegates must have Professional Profiles that can be viewed by the proposal initiator.
Creating the Routing Chain

• Whoever creates the proposal can specify the review and approval route by setting up a **Routing Chain** in the Proposal.

• Open the Prime Proposal and click the **ROUTING AND APPROVAL** button, ![Routing & Approval](image).

• The PI of the proposal automatically appears first in the Routing Chain.
Creating a Routing Chain

1. Add reviewers by clicking the **ADD** button.
2. Insert a person into the chain by clicking the **PLUS** sign. Click on the appropriate icon to add above or below members of the existing chain.
3. Choose the name of the required reviewer and click **ADD TO CHAIN**.
4. Click **CLOSE EDIT CHAIN WINDOW**.
   - All reviewers must have an established Professional Profile, otherwise they will not be on the list.
   - You can only select reviewers if you have permission to view their Professional Profile; therefore make sure that you have been granted permission to see their profile.

See next slide for screen shot.
Creating a Routing Chain

Add to Routing Chain

Add: [* = AOR]

Please select...

* Hoff, Andrew (U of C) / University of Cayuse
* Jackson, Adrian (Office of Sponsored Research) / University of Cayuse
Jacobson, Jodi (Medicine) / University of Cayuse
Creating a Routing Chain

- You will see the following sample message: Andrew Hoff has been added to the Routing Chain.
  - Repeat steps to add additional reviewers.
Editing the Routing Chain

- On the Routing & Approval screen, click the Edit Chain button.
- You can insert or remove persons from the routing chain once it’s defined by clicking on the appropriate icon and following the system prompts.
Initiating a Routing Chain

• Once you have completed the routing chain, the PI or their delegate can initiate the chain by clicking the box adjacent to their name.
  o Whenever a proposal is initiated or approved by someone on the routing chain Cayuse will prompt you to approve the action.

• Click APPROVE.

SEE NEXT SLIDE FOR SCREEN SHOT.
Initiating a Routing Chain

Routing Chain

1. Begin
   - Heldens, John (U of C) / University of Cayuse
   - Spears, Michael (U of C) / University of Cayuse
   - Hoff, Andrew (U of C) / University of Cayuse

2. End

Action: Approve

Comments:

(as Heldens, John (U of C) / University of Cayuse)
Initiating a Routing Chain

Once the Routing Chain is initiated three things happen:

1. An e-mail is sent to the next reviewer on the list notifying them of their turn to review the proposal.
2. “Write” permissions are taken away from all those who have permissions to the proposal.
3. The proposal is added to the Routing List of all the reviewers on the chain (the Routing List is found on the **Routing** tab).
Routing: Warm/Hot List

- Each user has their own **Routing List** that is accessed from the **Routing Tab**.
  - All proposals this reviewer is requested to review are listed.
  - Each proposal shows how long it’s been in a review process.
  - Click on the link to be given access to the proposal for review purposes only.

<table>
<thead>
<tr>
<th>Proposal</th>
<th>Steps away</th>
<th>Days old</th>
</tr>
</thead>
<tbody>
<tr>
<td>Britto, Lucille - NSF Proposal</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>Copy of LaLonde, David R21</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>Heldens, John 2/5/09</td>
<td>2</td>
<td>0</td>
</tr>
</tbody>
</table>
Routing: Rules

- Proposal approval must follow the routing chain. Reviewers can look at a proposal once it hits their Routing List, but they cannot approve it until the previous reviewers on the routing chain have signified their approval.
- Once a proposal is routed, Cayuse grants temporary permission to reviewers to access the proposal.
- In case of an emergency a reviewer may be deleted from the chain (or skipped).
- From the routing chain “initiator” perspective, the proposal becomes “read only” once routing is initiated.
Approving the Proposal

• Reviewers indicate their approval by checking the box adjacent to their name.
• Once approved, the next reviewer on the routing chain is notified via e-mail.
• As soon as the AOR (or Delegate) checks their box an email is sent to everyone on the routing chain and electronic submission to Grants.gov can proceed.
Retracting Approval

- Once approval is given it can be retracted by un-checking the box next to the reviewers name. This will cause the proposal to be sent back for re-review and/or corrections.
- Once a routing chain is started, the initiator can Recall (cancel) the whole process by un-checking their box.
Routing: History

- All routing actions are logged in the proposal’s Routing History.