Cayuse S2S Guide
Submitting a Proposal to Grants.gov

cayuse
Proposals (S2S)

M
MARSHALL
RESEARCH
CORPORATION

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What is Cayuse?

Cayuse is Marshall University's new research management software that will streamline and enhance research administration processes. Cayuse offers a comprehensive suite of tools designed to simplify the entire research life cycle, from proposal development and submission to award management and compliance tracking.

Key features of Cayuse include:
- **Proposal Development**: Researchers can easily create, collaborate on, and forward grant proposals for approval and submission using intuitive templates and integrated workflows.
- **Proposal Submission**: The Cayuse system integrates with Grants.gov, allowing for the electronic submission of grant applications to funding agencies.

Cayuse Sponsored Projects (SP) vs. Cayuse System to System (S2S)

Cayuse SP: This will also be referred to as the Proposal Record form. This is where PIs will prepare a proposal for internal routing and review. Cayuse SP (Proposal Record Form) will replace the Authorization to Submit (ATS) Form previously used for institutional approval. As a PI you will initiate the Proposal Record in Cayuse SP and submit for routing to your MURC Pre-Award Grants Officer.
Note: The ATS Form will still be utilized during the first few months of Cayuse implementation.

Cayuse S2S: This function is an alternative for preparing, validating, and submitting proposals via Grants.gov. With Cayuse S2S any proposal that can be submitted through Grants.gov will go through Cayuse S2S. Your MURC Pre-Award Grants Officer will initiate the proposal in S2S and work with you to complete it for submission.

Getting Started with Cayuse S2S

What Brower is Supported by Cayuse S2S

Cayuse SP runs entirely in a web browser. The Research Suite can be accessed on various browsers on either Windows or iOS systems. The browser recommended by the manufacturer is Google Chrome and/or Apple Safari; however, other browsers such as Firefox will also work.

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

Windows
- Recent versions of Mozilla Firefox or Google Chrome.
- Provisional support for Microsoft Edge.

iOS
- Recent versions of Google Chrome and Apple Safari.

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

Upon navigating to Cayuse for the first time, your browser may present a security warning prompting you to accept a certificate. This is safe. Cayuse purchases and maintains electronic certificates that are approved for Internet commerce and are compliant with Internet security standards. Accept the certificate permanently and you will proceed to the login screen.

You will also want to ensure that your browser is configured to these settings for Cayuse:

- Cookies: **Enabled**
- Pop-ups: **Allowed**
- JavaScript: **Enabled**

A step-by-step guide on how to configure your browser can be found here. Your MURC Pre-Award Grants Officer is also available to further assist if needed.

Login into Cayuse using your Marshall University email and password here.

1. Once logged in you will be directed to the Cayuse homepage.
2. In the top right corner click **Product**.
3. A dropdown menu will appear. Select **Proposal (S2S)**.
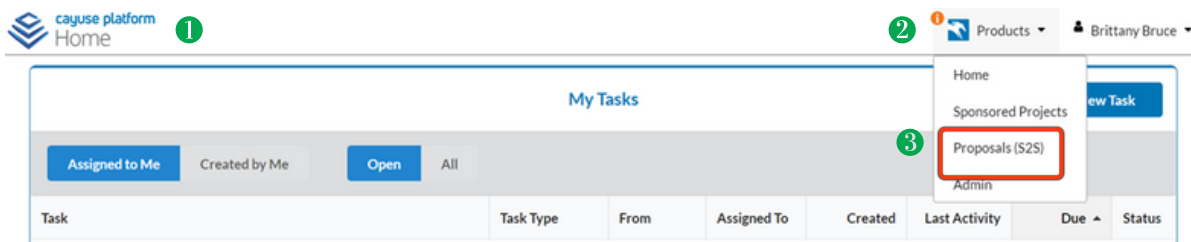
Cayuse Proposal (S2S) Dashboard / Create a Proposal

Note: Your MURC Grants Officer can create the proposal if you prefer. In this case, navigate to the locating your proposal section of this guide.

4. Once selected you will see the Proposal (S2S) dashboard.
5. In the top right corner click **Create Proposal**
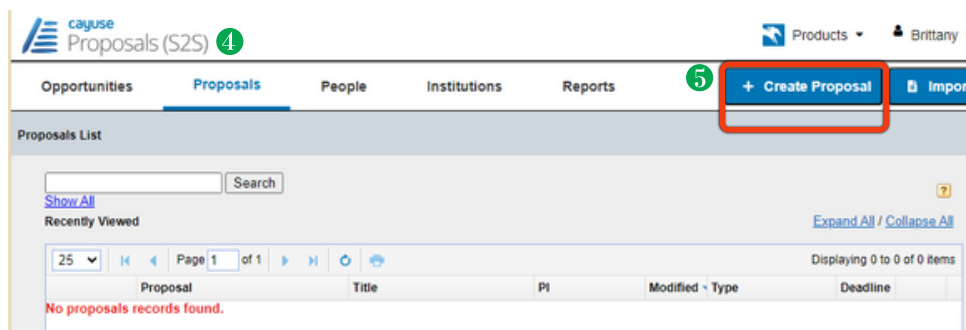
6. On the **Create Proposal screen**, you will have four options to select from. Currently, Marshall University is only using the Grants.gov option.
   - **Grants.gov**: This is where you would identify an opportunity that is available from Grants.gov. This opportunity will be downloaded directly to the Cayuse environment.

Select **Create** to be directed to the Proposal Information Screen.
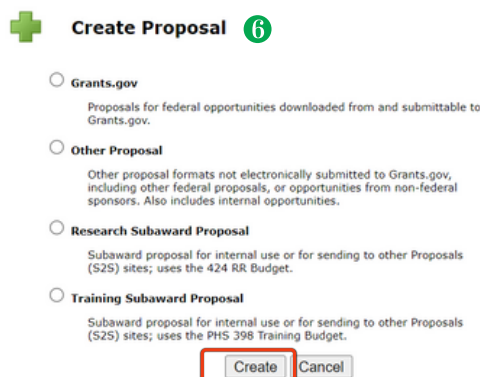
Proposal Information

Enter the information to create your proposal.

- **Name the Proposal**: The proposal name is how Cayuse will identify your proposal.
  - Note: This is not the PI's Project Title. Marshall's Naming Convention for Cayuse Proposals will be RFA/PA/PAR/FOA and PI name **EXAMPLE: PA-20-185 Ima R. Searcher .** This name can be edited.
- **Select the Principal Investigator**: Scroll through the PI list and select the person who will be the PI on this proposal. If the PI you wish to select is not in the list, be sure to search for the PI, or click show all. If a PIs name does not appear, email your MURC Pre-Award Grants Officer. The Officer will check the following:
  - If the PI name is not on the drop-down menu, please check the following:
  - Does the PI have the PI role selected in the eraRoles under the People Tab?
  - Is this individual new to the university? If so, they will need to be given a Cayuse ID and added to the system.
- **Select the Organization**: Select Marshall University Research Corporation.
- **Default IDC Rate**: Select the appropriate rate from the drop-down
- **Number of Budget Periods**: Check the appropriate number of budget periods needed for this project. This can be changed later.
- **Due Date**: Add the proposal deadline.
- **Validation Type**: Select the appropriate validation for the funding agency

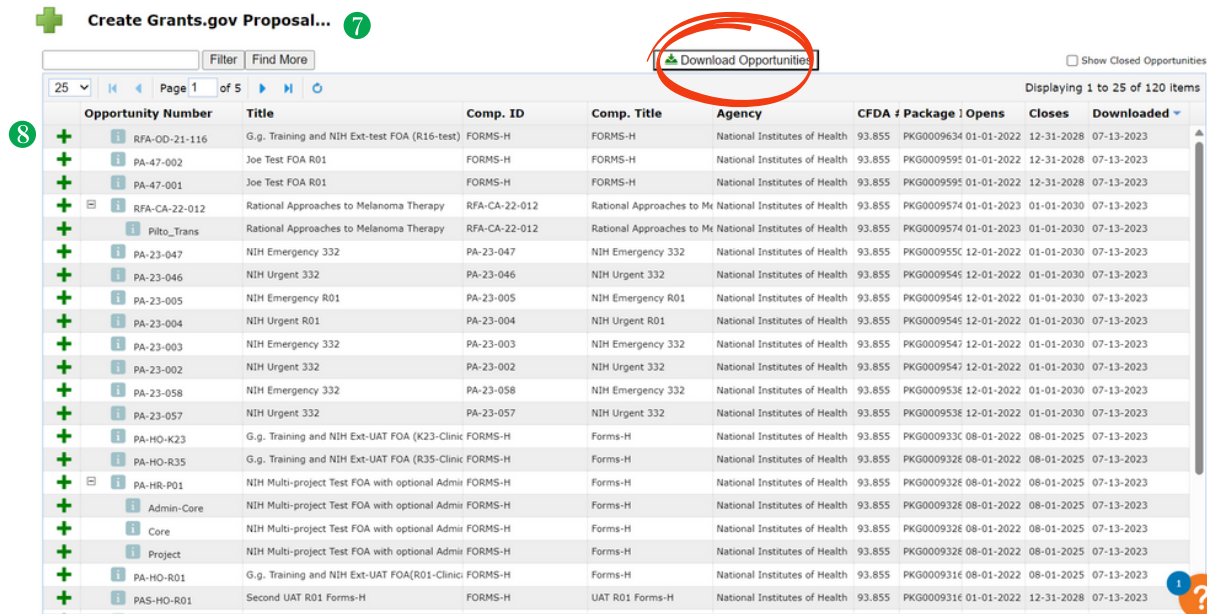After choosing the validation type, click **Create Proposal**. The proposal will open and you'll see the included forms and other information.

Finding Opportunity/Downloading New Opportunity

7. This screen will show all the opportunities that have been downloaded into the Cayuse environment. Not all opportunities from Grants.gov are downloaded here.

8. Once you have found the correct opportunity, click the green + to begin creating the proposal.

Note: You are able to search and download additional opportunities by selecting Download Opportunities on the top of the screen.

9. On the **Download Opportunities Screen**,
- You can search using the opportunity number, CFDA # or Package ID
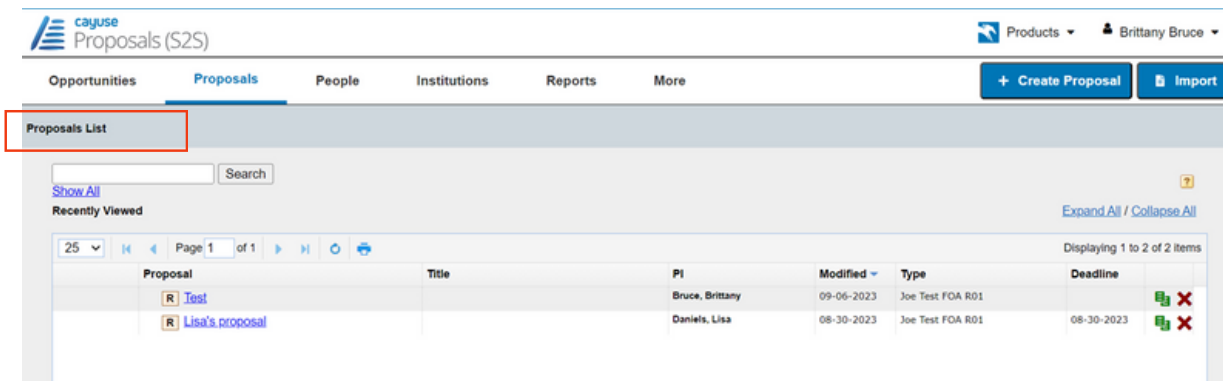
Locating a Proposal Application

If your MURC Pre-Award Grants Officer created the proposal application, follow the steps below to locate your proposal.

- Once you select Proposals (S2S) from the Products menu, you will see the **Proposal (S2S) dashboard**.
- Your proposal will show up in the **Proposal List**. Check to make sure your name is listed under the PI.
- Hover over your proposal name and click **Edit Proposal**.

Note: You may need to select Show All to see your proposal. If you do not see your proposal, reach out to your MURC Pre-Award Grants Officer for assistance.

Basic Navigation

After signing in to Cayuse S2S, you will find yourself on the Overview tab. The Overview tab is a quick way to get to any other section of Cayuse S2S.

Each tab corresponds to a major functional area of the application where you can complete tasks related to that area.

Opportunities

The Opportunities tab contains opportunities that have previously been downloaded from Grants.gov by someone at your institution. From the Opportunities tab, you can:
- Download available opportunities • View details of downloaded opportunities
- Create new proposals

Proposals

The Proposals tab has a list of all the proposals that you have permission to see. From the Proposals tab, you can:
- Search for a proposal you want to review or edit.
- Create or edit a proposal or subaward.
- Link subawards to proposals.
- Import a subaward.

People

The People tab lists professional profiles in your institution's instance of Cayuse S2S. Professional profiles store information about people at your institution. The information in these profiles can be easily autofilled into proposals. From the Peopletab, you can:
- Search for people and view their professional profiles.
- Create or edit a profile for a person at your institution.
- Link a professional profile to an institutional profile.

Institutions

The institution tab contains the institutional profiles currently in your Cayuse S2S application. Typically, the primary profile is for your home institution, but if you frequently work with other institutions, you can create additional institutional profiles that can be auto-filled into proposals. From the Institutions tab, you can:
- View institutional profile information.
- Create or edit an institutional profile if you have access to do so.

Reports

The Reports tab shows a list of reports that you can create from the data within Cayuse. You will only be able to create reports on data you have access to in Cayuse S2S. Most reports allow you to choose your time period and some
have other options you can select. The available reports are:
- Submitted proposals (with or without direct links to the proposals).
- Proposals by Department.
- Proposed Dollars (submitted proposals with proposed dollar amount).
- Awarded Proposals by Department.
- Awards by Agency.
- Proposed Subawards.
- Awarded Subawards.

Quick Navigation

Cayuse contains navigation links that make it easy and safe to move between screens or to refresh a list. One such tool is the "breadcrumb trail," which appears beneath Proposals, People, and other tabs once you have opened a proposal, a Professional Profile, or other record. The example below illustrates the breadcrumb trail you would see while viewing a linked subaward on a proposal.

| Overview | Opportunities | Proposals | **Subawards** | Rout |

Proposals List » Prime » Linked Subawards » **another name**
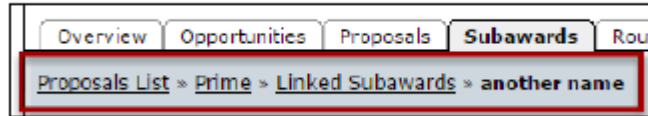
The underlined words are links that take you back to a previous screen. When you return to a previous screen in the breadcrumb trail, Cayuse S2S automatically refreshes the page.

In addition, most pages in Cayuse S2S contain a ⬚ icon. Use this icon to update or refresh a page rather than using the browser's standard Refresh button.

Note: While working in Cayuse and other web applications, avoid using the Back, Forward and Refresh buttons in your browser. On simple websites, these buttons are appropriate for browsing. For Cayuse S2S and other complex web applications that handle important data transactions, it's best to use the controls built into the application

Cayuse Proposal (S2S) Application Screen

Below is a screenshot of a sample proposal application in Cayuse S2S.

1. You will move through the sections of your application via the menu on the left side of the page.
2. The selected form appears to the right of the list.
3. Clicking the **Proposals List** link will return you to the Proposals List page.

Again, your MURC Pre-Award Grants Officer is able to set up the application and notify you when to login to add in additional information.
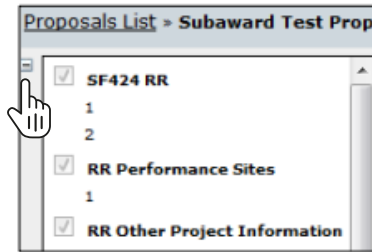
Navigating a Proposal Application

When you start a new proposal in Cayuse S2S, it will assemble a few forms displayed in a list on the left side of the page. The selected form appears to the right of the list. Clicking the Proposals List link will return you to the Proposals List page.

At the top left of the list, there will be a ⊟ icon. Clicking this will cause the list to minimize, giving the full window to the currently selected form. It will also change the ⊟ icon into a ⊞ icon. Click the plus icon to bring back the list.

Autofill Feature

When you create a proposal, Cayuse S2S uses the information you provide to autofill institutional and personal information from the institution you select as the Organization and the person you select as the Principal Investigator. Autofill pulls data from a stored location into the proposal, where you can edit it manually or update it by re-autofilling.

There are several locations throughout the proposal where you can autofill stored data. Those locations are indicated by the ✏ icon . Clicking this icon will bring up a selection dialog for a person, institution or other type of stored data. The applicant organization information, administrative contact, Performance Sites, Key Persons and other contact fields can generally be entered using autofill. This makes it easy to ensure that you have the correct information throughout the proposal. **Institutional Information will be automatically entered in the system and updated by MURC staff.**

Key Persons

The Key Persons form displays the data for your proposal's Principal Investigator and associated Senior/ Key Persons. You can edit their personal and budget details manually or using autofill and attach biosketches. You can also see data for Key Persons from your linked subawards.

If you see that your information is incorrect, please note that this information is pulled from the Marshall University Banner system and may not be completely accurate. You can edit the information for the Key Personnel.

Note: The PI information on the SF S2S Page must match the PI information exactly on the Key Personnel Page (this has to be done manually).

Clicking **Expand All** or **Collapse All** will show all the information for listed Key Persons or hide all of that information, respectively. Clicking Sort will order Key Persons by PD/PI, Co-PD/PI, Alphabetical, or Other Significant Contributor. You can also manually sort by clicking the up arrows and down arrows to the right of the Key Persons.

If you have existing personnel, you can view their details by clicking on the [+] icon to the left of each. For Senior/Key Persons on the prime proposal, you can edit their information directly, or attach a Biosketch and a Current & Pending Support PDF.

Clicking the ✖ icon on a particular Key Person will prompt you to delete that Key Person from the Proposal. This will remove them from the proposal entirely, including any budget entries that they might have.

To add new Senior/Key Persons, autofill them into the proposal. You can change data for existing Key Persons by managing the Key Person.
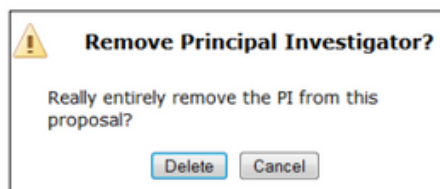
To add new Senior/Key Persons, autofill them into the proposal. You can change data for existing Key Persons by **Managing the Key Person.**

Adding Key Persons

To add Key Persons to your Proposal, either click on the 🖊 icon on the RR Key Persons form or click Add Key Person in the Manage Key Persons dialog.
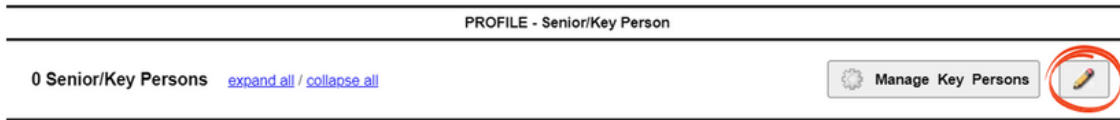
The dialog box shows a list of Key Persons available for autofill. By default, this list shows recently used Key Persons. To view all available Key Persons, select **Show All** under the Search box at the top left. This is shown in the red box below. You can also search for Key Persons to autofill using their first name, last name, institutional association, or department.

Once you've found the person you're looking for, select their profile and click **Add Selected Key Person**. You'll be taken back to the list of Key Persons and can edit your new Key Person there.
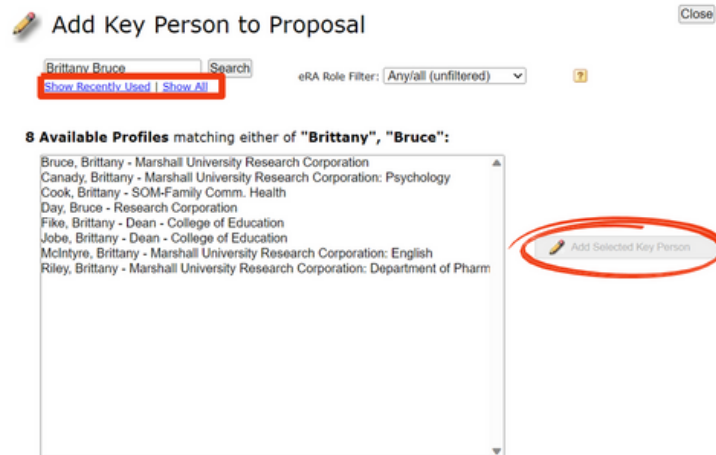
Note: When searching or using the Show All function, you can also filter by eRA Role. Just select the role you are looking for from eRA Role Filter dropdown at the top of the page. When adding a Key Person, you will usually want to select Principal Investigator, as shown. **If the individual is not in the Cayuse system, please contact your MURC Pre-Award Grants Officer to get the individual added manually**

Managing Key Persons

Clicking the ⚙ icon beside any Key Person brings up their data management screen, where you can manage the project role, appointment type and budget data. (You can access the same screen through the person's entry in Budget Form) Clicking the 🟩 icon re-autofills their data from the linked Professional Profile. This replaces any data you've entered manually for the person.

Managing All Key Persons

Clicking the **Manage Key Persons** button at the bottom of the list brings up the Manage Key Persons dialog for all personnel, including the PI, whose entry shows as gray rather than the green background of other Key Persons. This is convenient when you need to edit multiple Key Persons without opening each one individually.

At the top of the window, you can choose whether to sort by Alphabetical Order or Key Person Form Order.

Clicking the 👤 icon will take you to the Professional Profile that is linked to that Key Person. A 🌐 icon means that they are a Key Person on the Subaward. Subaward Key Persons cannot be edited on the Prime Proposal. Clicking **Edit on Subaward** will move you into the associated Subaward, where you can then edit their information.

Performance Sites

The Performance Sites form displays the information for all your proposal's performance sites. To access the Performance Sites form, select it from the form list on the left of the proposal.

When a proposal is first created, the primary performance site (Project/Performance Site Primary Location) will be filled out if you have selected a PI or an organization. All of the fields shown here are editable. Clicking the icon to the left of the organization name will take you to the entity the performance site is linked to. Clicking the ⬒ icon will prompt you to re-autofill the performance site information from the associated institutional profile. This will replace any data you've changed in the proposal with data from the profile. Clicking the ✖ icon beside any performance site removes that performance site from the proposal.

For other performance sites, you can see all the sites' information, or just the names, by using the **expand all** or **collapse all** links. You can also use the plus icon to the left of the performance site's name to expand it, and minus icon to collapse. To change the order that other performance sites appear in, click the up arrow icon or down arrow icon next to the site name.

You can add other sites to your proposal by clicking the pencil icon below the Primary Performance site.

Budget

As in other sections of the proposal, Cayuse S2S presents you with the budget form that the opportunity has provided, and you can fill it out as you normally would. There are also many features such as autofill, automated calculations, budget period replication/escalation, and indirect cost rate selections to make the process of creating proposal budgets faster and more accurate.

Although Cayuse S2S automates much of the number crunching and validates the proposal as you work, always make sure to follow the instructions specific to your funding opportunity.

When preparing the application the Modular Budget or the RR Budget will be used. Both do not need to be completed. This will be determined by the program. For questions on this contact your MURC Pre-Award Grants Officer.

Modular Budget

Most opportunities require a detailed budget that provides specific information on the allocation of the budget to distinct categories of spending. However, NIH opportunities may also provide a Modular Budget form (PHS 398 Modular Budget) for proposals with up to $250,000 in direct costs (less Consortium F&A) for certain mechanisms. More information can be found on NIH's Modular Research Grant Applications page.

In Cayuse S2S, opportunity packages with a modular budget will also have a detailed budget attached. Both budgets will be labeled optional, but you must select one to submit.

Although the modular budget is a replacement for the detailed budget at NIH, you may need to prepare a detailed budget for MURC. In Cayuse S2S, you can fill out the detailed budget, which includes many helpful calculation tools, and the numbers will automatically flow into the modular budget form. If this is not necessary, you can also manually calculate and enter the modular budget figures directly into the modular budget form. Be sure to separate out any Subaward Indirect Costs and enter them in the appropriate field.
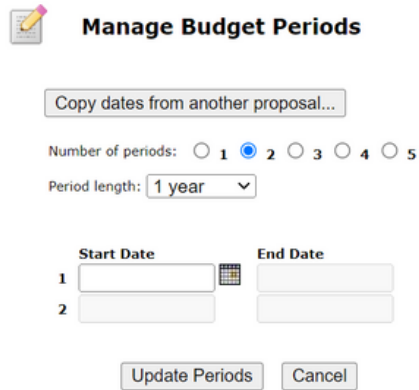
You cannot submit detailed Subaward budgets with a Modular budget. If you check the subaward inclusion checkbox when you are using a modular budget, Cayuse S2S will display an error:

Error: [Subawards][NIH] A Subaward Budget Attachment Form may not be included if a modular budget has been submitted. (uncheck one of the inclusion checkboxes)

Proposals using a modular budget usually have a certain dollar amount introduced by the rounding up process from the actual to the module. If a local administrator has configured a default rate for Modular Budget Rounded Direct Costs in the **Institutional Profile**, at the bottom of the **Indirect Costs section**, Cayuse S2S can automatically apply an indirect cost rate to this amount.

Budget Period Editor

The dates for your project periods must be entered in many places across the proposal. In any project period date field, you can use the Budget Period Editor to manage your project dates. Click the ✏️ icon to open the Budget Period Editor. This icon is found at the top right of the budget form.

You can select the number of periods, up to the number allowed by the form included in your opportunity package, or 10 for Other proposals. Usually the Period length is 1 year, but if you need a different period length, you can select 3 months, 6 months, or even create a custom period.

With a pre-selected period, all the dates will populate once you select the start date and the number of periods. If you have a custom period, you must select each period's start and end date manually.

 Click **Update Periods** to apply the changes.

Automated Calculations

As you enter budget data in each budget period and category, Cayuse S2S takes the raw numbers you enter and creates subtotals and cumulative totals, and automatically fills those numbers and calculations into the appropriate fields on all applicable pages.

In general, to take the greatest advantage of the automated calculations, you should start filling out the budget from the top, and only fill in totals where they don't automatically appear.

Calculated Fields

A calculated field derives its information from other fields where values have been entered directly, or from a calculation performed within the field on the entered value. Values in these fields are automatically calculated while you are filling in the form and are recalculated each time you enter data into a related field. In many calculated fields, you are permitted to overwrite the calculated values. In those fields where overwriting is permitted, a red star appears next to the field indicating that you have over-written it.

Base Salary ($)	Cal. Salary ($)	Acad. Salary ($)	Sum. Salary ($)	Cal. Mons	Acad. Mons	Sum. Mons	Requested Salary ($)	Fringe Benefits ($)	Funds Req. ($)
100,157	100,157	0	0	5.000			45,000 ★	13,500	58,500

Caution: If you overwrite a calculated field, the information in that field will not be updated when you change the information in other, related fields. This can cause your final values to be wrong! Use caution when overwriting calculated fields.

To return a field with a red star to its normal, calculated value, simply remove the number you have manually entered in the field. The calculated value will reappear. If you are having trouble with errors that are resulting from out-of-date automated calculations, running Final Review checks all forms and fields for errors, and will update any calculated fields that have not been manually overwritten with an up-to-date value.

Percentage and Currency Fields

Most percentage and currency fields in the budget only allow entering numbers Percentages must be entered as decimal numbers (e.g. 45.5 or 4.5). Dollar amounts should be entered as numbers, and will round to the nearest dollar. To see $10.00, enter 10. If you enter 10.99, you will see 11 in the field.

In certain places, there are special fields which will accept either dollar amounts or percentages, such as the effort fields (Calendar, Academic, and Summer Months) and the Fringe Benefits field. In these fields, enter a plain number to get a dollar amount: entering 63.5 would yield $64. Enter a percentage to see the dollar amount calculated based on the percentage. Entering 63.5% in the Fringe Benefits field displays a dollar amount equal to 63.5% of the Requested Salary.

Key Person Budget Entries

You can access the budget entries for Key Persons from the Budget form or from the Key Persons form by using the Manage Key Persons button. The appropriate information from this dialog will flow into each form.

Appointment Type

When you are in the Manage Key Person dialog, you'll see the person's Appointment Type as well as salary and fringe information for each budget period.

| Role: | PD/PI | | | | | | Other Project Role Category: | | |

Appointment type (months): Calendar: 12.0   Academic: Summer:

Budget	Cal. Salary	Acad. Salary	Sum. Salary	Cal. Months	Acad. Months	Sum. Months	Req. Salary	Fringe Benefits	Funds Requested
prd 1	100,157	0	0				0	0	0
prd 2	100,157	0	0				0	0	0

The entries in the Appointment type fields determine which salary fields are available. Here, the PI, , has a 12-month calendar appointment. The Calendar Salary and Calendar Months fields are enabled, while the corresponding Academic and Summer fields are disabled, because the PI does not have an Academic/ Summer appointment type. If you need to change the Appointment Type, it's best to do so in the person's Professional Profile and re-autofill the data to the budget using the refresh arrows, or you may end up with numbers you can't edit does not have an Academic/ Summer appointment type. If you need to change the Appointment Type, it's best to do so in the person's Professional Profile and re-autofill the data to the budget using the refresh arrows, or you may end up with numbers you can't edit.

Effort and Salary Calculations

To determine the requested salary, you can use the person's base salary as entered in the Cal. Salary or Acad. and Sum. Salary fields along with effort entry in the Months field. For our PI, we can enter 3 in the Cal. Months field.

Budget	Cal. Salary	Acad. Salary	Sum. Salary	Cal. Months	Acad. Months	Sum. Months	Req. Salary	Fringe Benefits	Funds Requested
prd 1	100,157	0	0	3.000			25,039	7,176	32,215
prd 2	100,157	0	0	3.000			25,039	7,176	32,215

This automatically populates the requested salary with the correct amount based on the effort. If the person has Fringe Benefits entered in their profile, these will also be calculated and added to the total in Funds Requested.

If you've calculated your effort in percentages rather than directly in person-months, instead of 3 you could enter 25%. This will immediately be converted to the correct number of person-months (using the total appointment duration as 100%) and the salary will be calculated as well.

 If you attempt to enter values that are too large, you'll see an error message. Enter the correct number or percentage to correct the error.

Attachments

Cayuse S2S allows you to attach PDF documents within the **Supporting Documents** area to provide important supporting information for your submission.

Attaching a PDF Document

Each area where a file can be attached to a proposal form in Cayuse S2S will show the name of the attachment point on the left, and show two buttons on the right: Add and Delete. Delete will be disabled unless an attachment has been added. See the example below for the PHS Human Subjects and Clinical Trials Information section.

To add an attachment:

- Click **Add** to launch the Upload Attachment dialog.

- Click **Choose File** to select the PDF file. Browse for and select the file you want to attach from your computer, drive or network.
- If you want to add a source file as well, click the second **Choose File** button and find the source file to include.
- If you need to change the name of the attachment, (for example, if agency policy requires a particular attachment name), edit the text in the Name field.
- Click **Upload**.
- The document(s) will be uploaded, and you'll see links you can click on to review them.
- Click **pdf** to view the PDF

File Formats

Cayuse S2S can submit only PDF documents as attachments. You can upload and attach a source file for your records, but only the attached PDFs will be submitted. PDF files containing active form fields cannot be uploaded, to avoid errors when the proposal is submitted through Grants.gov.

Grants.gov and Agency PDF requirements

Both Grants.gov and certain agencies, particularly NIH, have guidelines for attachment format and certain PDF-specific requirements. Evisions recommends complying with Grants.gov and agency guidelines whenever possible, and always verifying the content of your proposal after submission to ensure that it was transmitted correctly.

If you need to create a PDF from another documents (including creating 'flat' PDFs from PDFs with active fields), you can use a PDF creation utility, either a standalone program such as those recommended by Grants.gov, or built-in features such as the "Save as PDF" feature in Mac OS X and in Microsoft Word 2007 and later. If you are using a standalone program, simply printing the document to PDF again after opening it in the program is usually enough to flatten active fields as well as comments and stamps (see below).

Cayuse S2S will automatically change special characters (such as &, -, *, %, / ,# , periods, spaces, and accented characters) in PDF file names to underscores, so no alterations should be required. Attachment names should be no longer than fifty (36) characters.

Note: When attaching a document, be sure that you do not attach a blank document by mistake.

Tracking Proposals

Cayuse S2S offers several tools allowing you to control access to proposals and track their progress through development and submission. Those tools are accessed on the toolbar in the upper right corner of the proposal screen, or under **Proposal Management** located below the forms list on the left side of the screen.

Icons

Each of the Proposal Management tools is marked by an icon. The following table illustrates the icon for each tool and describes what that tool does

Icon	Description
	Permissions. Clicking on the key icon will take you to the Permissions screen where you can manage user access and permissions on the proposal.
	Routing and Approval. Takes you to the routing and approval screen where you can build and manage the proposal's routing chain, approve the proposal, retract approval, and view the proposal's routing history.
	Electronic Submission. Click on the yellow lightning bolt to validate and submit the proposal. If the proposal has already been submitted, you can retrieve submission information.
	Proposal History. Opens the Proposal History screen where you can view an overview of the proposal as well as the history of edits and other activities on the proposal.
	Export. Sends you to the Proposal Export screen where you can validate, name, and export the proposal to another Cayuse 424 system.

Proposal History

To access the Proposal History from any proposal screen, find the ✔ icon at the top right corner of the proposal, or click Proposal History at the bottom of the left side proposal forms list.
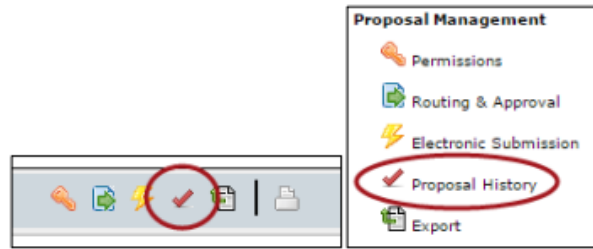
The proposal activity logged includes the Date/Time, username and a summary for the following actions:
- Create Proposal
- Upload Attachment
- Delete Attachment
- Save Proposal (which includes form changes)
- Approve/Retract Proposal (routing comments are logged)
- Validate Proposal

This change history can be filtered or exported as a .csv file.

The Proposal History can be filtered by date to narrow the shown results and locate a particular entry. This page also contains a Proposal Overview that summarizes identifying information about the proposal.

Note: Any user with view access to the proposal can see the Proposal History.

Permissions

Proposal permissions in Cayuse S2S allow you to control access to your proposals. By default, the creator of a proposal and the System Administrators have access to the proposal. Depending on your institution's Cayuse S2S configuration, the Pre-Award Admins may also have automatic access to your proposal. Some institutions also make use of the Read-only Reviewer role. People with this role can see and review all proposals in the system, but cannot make any changes. Other users cannot see or edit a proposal unless they are given permissions to do so. To grant someone particular permissions to a proposal, there are two permission types that you need to have yourself.

Viewing Current Permissions

1. Open the proposal.
2. Click the 🔑 icon in the upper right corner, or in the left sidebar under Proposal Management, to go to the Proposal Permissions.

The Proposal Permissions screen lists users who have access to the proposal and indicates what type of access they have. This list only includes users who have been given access through this screen, not all the users who can see the proposal because of their Administrator or Reviewer status or their presence in the routing chain.

In order to edit the list, you need to have Administrator permissions, or you must appear in the list with the Change Permissions, Add User/Group, or Remove User/Group boxes checked. If you don't have these permissions, you won't be able to add or remove people from the permissions or change which permissions they have.

Adding a User

- Click the **Add user** button.
- Select a user from the list, or search for another user by their name or username.
- Use **Show All** to show all users. The user is added to the Proposal Permissions. If the user is grayed out, they have already been added to the permissions.
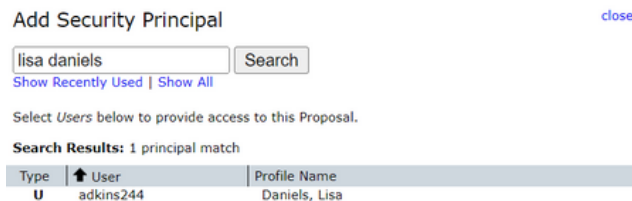
- Close the selection window by clicking the **Close**.

Editing Permissions

Once you've added someone to the permissions, you can change their permissions (if you are allowed to do so) by checking and unchecking the boxes to give them the right level of access.

Permission Types

Permission	Meaning
List	Can see the proposal in lists, but cannot open it for review.
Read	Can see the proposal in lists and open it for review, but not modify or print it.
Write	Can open and edit the proposal. (The Final Review action requires this permission because it recomputes values throughout the proposal.)
Delete	Can delete the proposal.
Change Permission	Can change permissions for this proposal, including their own. (This permission essentially allows complete control.)
Add/Remove User	Can add or remove a user from the proposal's permissions (but not modify which permissions are granted).
Attach	Can upload attachments to the proposal.
Print	Can print the proposal.
Submit	Can electronically submit the proposal to Grants.gov.
Break Lock	Can take write access away from another user who is editing the proposal. (Use this permission with caution; breaking the lock can result in the loss of unsaved changes.)

Removing a User

Once a user has been added to a proposal you can determine how much access to provide by editing the permissions (if you are able to do so). If it is no longer appropriate for a user to have any access then they can be removed from the proposal entirely.

To remove proposal permissions from a user, click the delete ✖ icon next to the name in the Proposal Permissions. The user will no longer be able to see or access your proposal.

Paired Proposals

Permissions for paired proposals are set in Cayuse SP and synced to Cayuse 424. If there are existing permissions on a Cayuse S2S proposal, those permissions will be overwritten by the permissions from Cayuse SP when the proposal is paired.

Note: If a Cayuse S2S user's write permission is removed while they are editing a proposal, they will only be able to edit and save on the page they are working on. When they navigate away from that page, the removed write permission will be recognized and they will no longer be able to save changes

Submission

To successfully submit a proposal from Cayuse S2S to Grants.gov, the proposal must be complete and must conform to Grants.gov and agency requirements, including the form data and attachments.

To access the Electronic Submission area of the proposal, open the proposal and click the ⚡ icon along the top or in the left sidebar.

The Electronic Submission information has three sections: Opportunity Details, Proposal Submission History, and Electronic Submission.

Opportunity Details

By default, the Opportunity Details are hidden. To show them, click the plus sign next to Opportunity Details. This is a quick way to verify which opportunity the proposal was created with, and get information such as the Agency Contact and Closing Date.

Electronic Submission

Opportunity Details

Opportunity	Research Project Grant (Parent R01 Basic Experimental Studies with Humans Required)
Opportunity Number	PA-20-184
Package ID	PKG00277411
Competition ID	FORMS-H
Competition Title	Use for due dates on or after January 25, 2023
CFDA #	
CFDA Description	
Offering Agency	National Institutes of Health
Agency Contact	eRA Service Desk Monday to Friday 7 am to 8 pm ET http://grants.nih.gov/support/
Opening Date	2022-10-26
Closing Date	2024-05-07
Schema	https://apply07.grants.gov/apply/opportunities/schemas/applicant/PKG00277411.xsd
Instructions	https://apply07.grants.gov/apply/opportunities/instructions/PKG00277411-instructions.pdf

Proposal Submission History

Electronic Submission

Submission Target	https://ws07.grants.gov:443/grantsws-applicant/services/v2/ApplicantWebServicesSoapPort

To submit this proposal electronically, press the button below. Please be prepared to wait for the submission to complete before continuing work on this proposal. Your submission will be recorded in the Proposal Submission History above

Validate Proposal   (Run final validation checks - recommended.)

☐ Submit to Grants.gov after validation

Proposal Submission History

If the proposal is in development and has not been submitted previously, the Submission History will be empty:

⊟ Proposal Submission History			
S2S portal Tracking	Received Date/Time	Submitter	Message

Once a proposal has been submitted, the tracking number, submission date, and who submitted it will appear here:

⊟ Proposal Submission History			
S2S portal Tracking	Received Date/Time	Submitter	Message
GRANT00566396	2013-04-19 08:53:35 PDT	gsutraining8	Successfully received by S2S port

If you click on the tracking number, the status of the proposal in the portal will be retrieved, and you can find out whether it has been validated and whether the agency has retrieved it. Once the agency has retrieved the proposal, if the agency has its own electronic portal, such as the NIH eRA Commons or NSF Fastlane, the proposal should appear there, and the PI will be able to review and/or edit them to ensure that the transmission was successful and accurate.

Electronic Submission

This is where you submit a proposal that has been fully and correctly prepared. The proposal must be successfully routed and approved by the final approver, usually an AOR. The target for the submission is shown (usually Grants.gov). proceeding with submission. The target for the submission is shown (usually Grants.gov).

Before submitting, we strongly recommend that you verify that there are no errors shown in the Errors/Warnings/Info section, then click Validate Proposal.

This checks your proposal for both the usual types of validation errors and errors in the construction of the XML data that is submitted to Grants.gov. The XML validations are not run during proposal editing because the XML changes rapidly as you enter data, so this is an important step to catch potential errors. If there are any problems with the XML, you'll see the following warning:

This will be followed by the error count and a description of each error. If you read the error descriptions carefully, you can often understand what the problem is. However, if you are having any trouble, or if your deadline is approaching, contact Support right away. If your proposal is error free after running the validations you will get a "No Problems Detected" report.

At this point, you are clear to click the Validate and Submit to Grants.gov button and the proposal will be sent to Grants.gov.

Troubleshooting

The S2S submission process is normally very stable. However, users very occasionally experience connectivity problems when submitting proposals. This is more common during heavy usage times around deadlines, and it does not necessarily mean that the transmission of your application has failed. In the event that an anomaly occurs, we recommend:

- Checking your email for a Grants.gov Receipt email containing the GRANT tracking number;
- Checking your email for a Grants.gov Acceptance or Rejection email containing the GRANT tracking number;
- If you're seeing "Check Status" in place of your GRANT tracking number, clicking the link to see if the GRANT tracking number populates.

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