





How to Review and Approve Cayuse Proposals (Department Chairs, Directors, Deans)

1. After the members of the research team (PI and Co-PIs) have certified the information in the proposal record form (formally known as the Authorization to Submit Form) within Cayuse SP and the documents attached to the form, the department heads or directors/deans will receive an email that contains a direct link to review, approve, or disapprove the proposal.

A sample email message looks like this:

Please Review Proposal 23-0108-P0001 Johnson: DoE; Where is the windiest place on Earth?

 Cayuse Administration <do-not-reply@cayuse.com>
To: 

  Reply  Reply All  Forward  

Mon 4/3/2023 12:58 PM

CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe

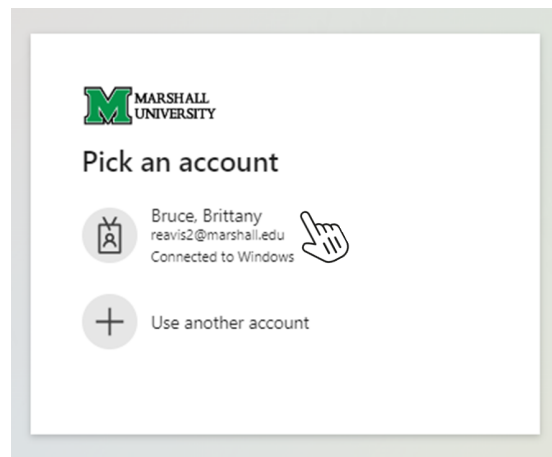
Dear 

Proposal 23-0108-P0001 for project Johnson: DoE; Where is the windiest place on Earth? has been routed for internal review.

You are required to review because a member of the Research Team listed VP For Research as their Internal Association on the proposal.

To review this proposal, please log in to [Cayuse Sponsored Projects](#).

2. Click the link in the email message and you will be launched into the proposal record form. You will be asked to login to Cayuse using your MUnet username and password (this is the username you would use to log in to MYMU and other MU applications). If you encounter any issues logging in please contact Joe Ciccerello at ciccarello@marshall.edu





3. Once logged in you will then see the Cayuse Platform Homepage similar to the one below. Under My Actions, you should see **Complete Review**.

The screenshot shows the Cayuse Platform interface. In the 'My Actions' section, the 'Complete Review' button is highlighted with a red box. Below it is a 'Route for Review' button. The 'Proposal Summary' section displays the following information: PI: [redacted], Sponsor: U.S. Department of..., Project Start: 7/1/2023, Project End: 9/1/2023, Admin Unit: VP For Rese..., Prime Sponsor: --, Instrument: Grant, Sponsor Deadline: 5/1/2023, and Total Sponsor Costs: 15000. The project ID is 23-0108. Below the summary are tabs for Proposal Form, Routing, History, Access, Tasks, Notes, Attachments, Links, and Admin Only. The 'Proposal Sections' sidebar shows 'General Information', 'Investigators/Research Team', and 'Budget' with green checkmarks. The 'General Information' section includes 'Sponsor Information' with a dropdown menu set to 'U.S. Department of Energy (DoE)' and a 'Prime Sponsor' dropdown.

4. **Locate the Proposal Section tabs that have a green check mark to the right.** These are the sections highlighted in yellow below not the top tabs in red. You will see 10 sections listed beginning with *General Information*.

The screenshot shows the 'Proposal Form' section. The 'Proposal Sections' sidebar is highlighted with a yellow background and contains 10 sections, each with a green checkmark: General Info, Personnel, Approvals (Hidden), Research Subjects, Research Materials, Budget, Subawards, Intellectual Property, Export Control, Application Abstract, and Attachments And Submission Notes. The 'Basic Information' form includes the following fields: PI's Project Title* (text input with value 'Lisa's cool project'), Project Start Date* (text input with value '12/7/2023'), Project End Date* (text input with value '12/29/2029'), and Proposal Deadline* (text input with value '12/7/2023'). Below the form is the 'Sponsor Information' section, which includes a search bar for the funding agency, currently showing 'National Institutes of Health (NIH)'.



5. Carefully review all information provided in each of the 10 sections.

The screenshot shows a web interface for a proposal form. On the left is a sidebar titled "Proposal Sections" with a list of 10 sections, each with a green checkmark: General Info, Personnel, Approvals (Hidden), Research Subjects, Research Materials, Budget, Subawards, Intellectual Property, Export Control, Application Abstract, and Attachments And Submission Notes. The main content area is titled "General Info" and contains two sections: "Basic Information" and "Sponsor Information".

Basic Information

* Indicates Required Fields

PI's Project Title*
Lisa's cool project

Enter your project title here. It can be changed later. If unknown, write "unknown at this time"

Project Start Date* 12/7/2023 Project End Date* 12/29/2029 Proposal Deadline* 12/7/2023

Indicate the estimated start date. Indicate the estimated end date.

Sponsor Information

The Funding Agency, or Sponsor, field is for the agency to which you are directly applying. The Prime Sponsor Agency field is to be used in the event of flow through federal funds. For example,

6. Approving the Proposal Record Form. Navigate to the *My Actions* section and *click Complete Review.*

The screenshot shows the "My Actions" section of the proposal form. A blue button labeled "Complete Review" is highlighted with a red rectangle. Below it is a grey button labeled "Route for Review". To the right is a "Proposal Summary" section with a dropdown menu set to "Under Review".

Proposal Summary

PI: Christine Jo... Sponsor: U.S. Department of ... Project Start... 7/1/2023 Project: 23-0108

Admin Unit: VP For Rese... Prime Sponsor: -- Project End ... 9/1/2023

Sponsor Deadline: 5/1/2023 Instrument ... Grant

Total Sponsor Costs: 15000

Proposal Form Routing History Access Tasks Notes Attachments Links Admin Only

All changes save automatically

Proposal Sections

General Information

General Information Investigators/Research Team Budget

Sponsor Information

Sponsor:* U.S. Department of Energy (DoE)

Prime Sponsor (if applicable):

Please select "Organization Not Listed" if sponsor does not appear in drop-down list. Use "Prime Sponsor" to denote the original source of funding. It is the organization from where the funds originate.

My Tasks 1



7. **Select Approve** from the dropdown menu. You have the option to enter any optional comments. Then click **Save**. The proposal record is now approved by you.

Complete Review [X]

Review Decision *

Approve

Approve

Return to In Development

Please add a comment.

Cancel Save

8. **Disapproving the Proposal Record Form.** If you have reviewed the proposal and you believe it needs some corrections, navigate to *My Actions* and *click Complete Review*.

My Actions

Complete Review

Route for Review

Proposal Summary

Under Review

PI: Christine Jo... Sponsor: U.S. Department of ... Project Start... 7/1/2023

Admin Unit: VP For Rese... Prime Sponsor: -- Project End ... 9/1/2023

Sponsor Deadline: 5/1/2023 Instrument ... Grant

Total Sponsor Costs: 15000

Project: [23-0108](#)

Proposal Form Routing History Access Tasks Notes Attachments Links Admin Only

All changes save automatically

Proposal Sections

General Information

Investigators/Research Team

Budget

Sponsor Information

Sponsor:*

U.S. Department of Energy (DoE)

Prime Sponsor (if applicable):

Use "Prime Sponsor" to denote the original source of funding. It is the organization from where the funds originate.

My Tasks



9. **Select Return In Development** from the dropdown menu and add required comments/reason for disapproval. Then click *Save*.

A screenshot of a web form titled "Complete Review" with a close button (X) in the top right corner. The form has a section labeled "Review Decision*" containing a dropdown menu. The dropdown menu is open, showing three options: "Approve", "Approve", and "Return to In Development". The "Return to In Development" option is highlighted with a red rectangular box. Below the dropdown menu is a text input field with the placeholder text "Please add a comment." and a red arrow pointing to it. At the bottom of the form, there are two buttons: "Cancel" and "Save". The "Save" button is highlighted with a red rectangular box.

The proposal record will be returned to an "In Development" status which will allow any corrections to the information in the form. Once the corrections have been made, the proposal will be re-routed from the beginning.