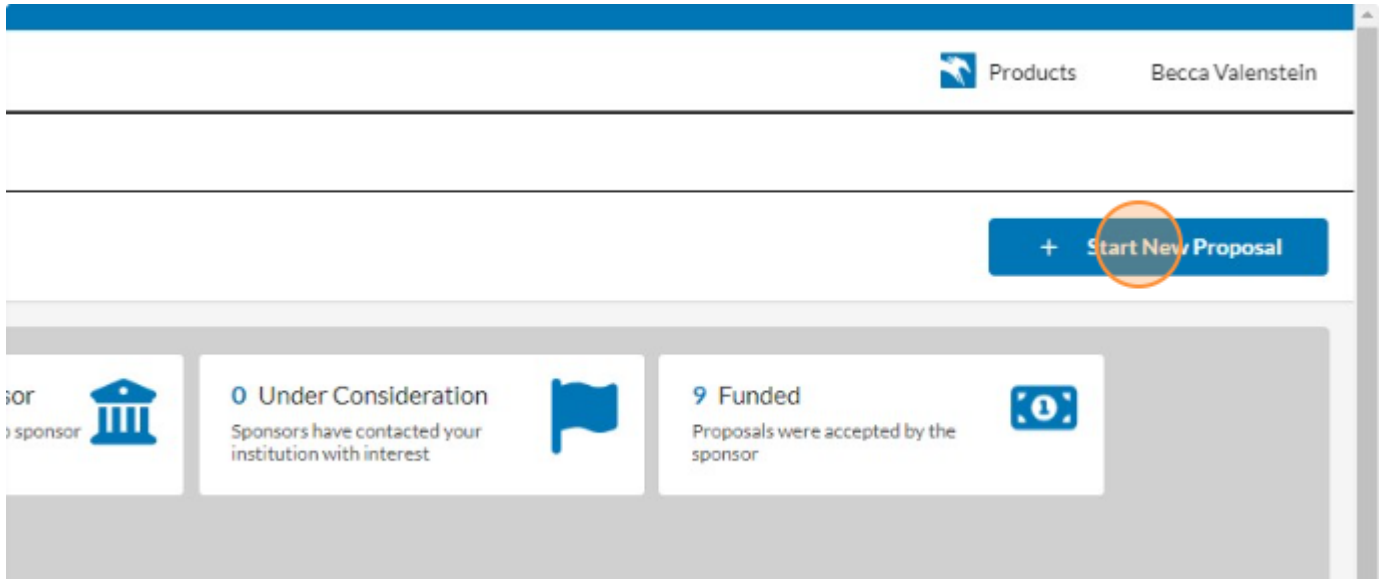
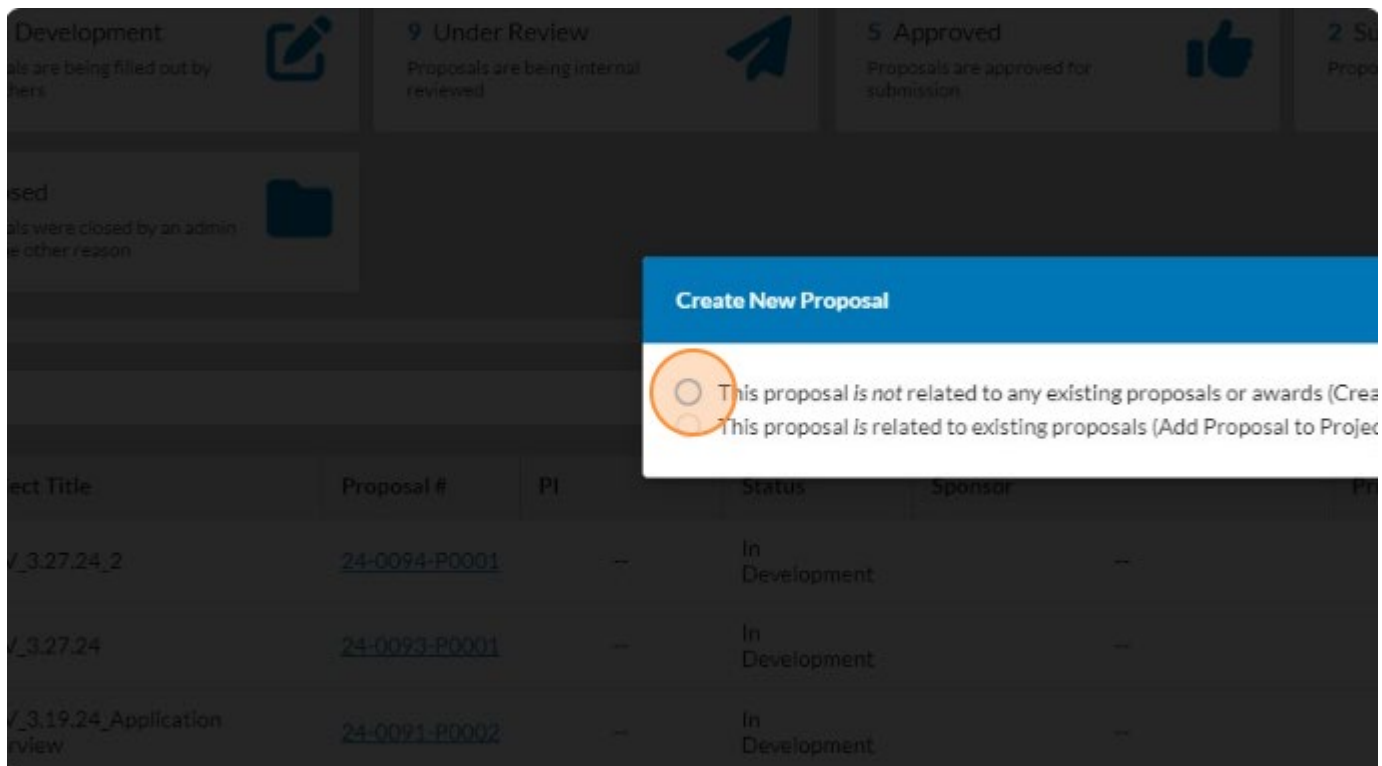


Creating and Completing a New Proposal Record

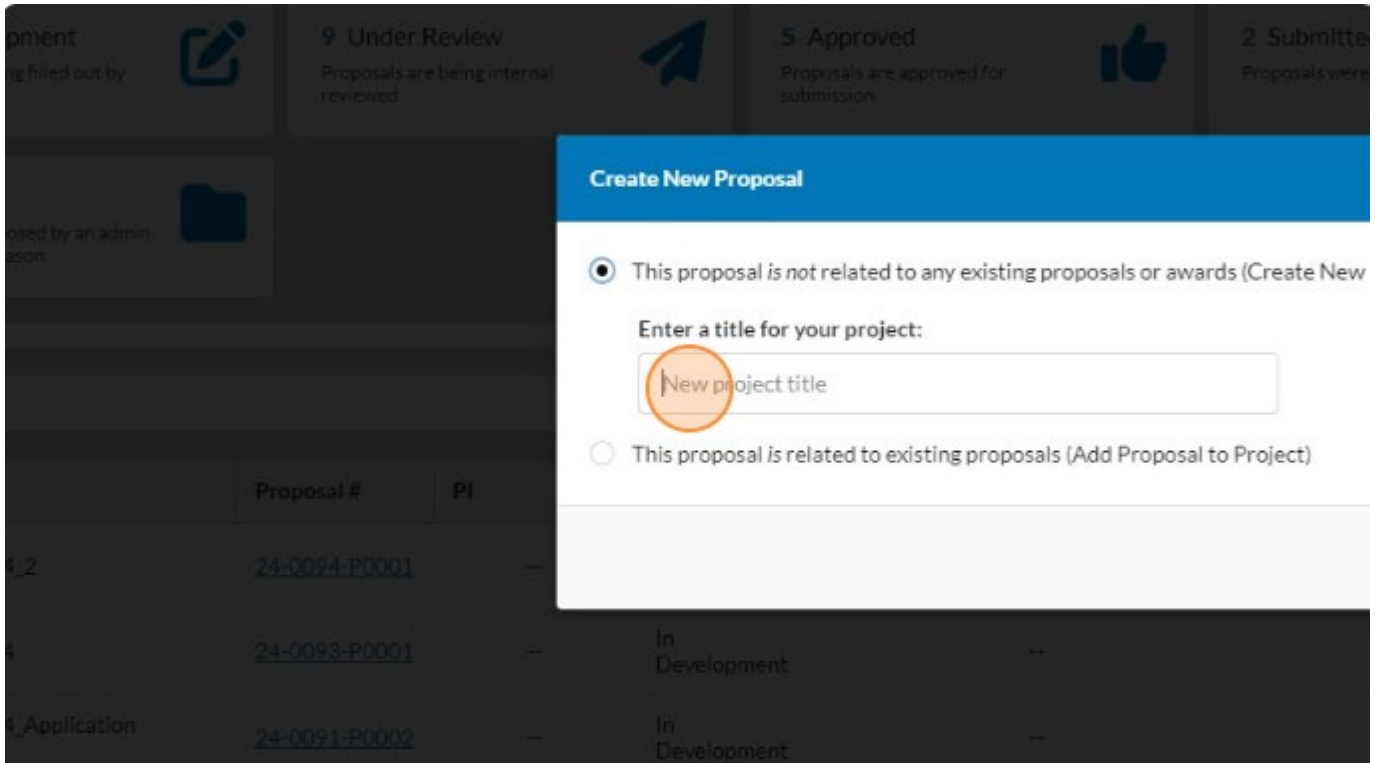
1. Navigate to Cayuse Sponsored Projects (<https://uccs.app.cayuse.com/>)
2. In the top right corner, click “Products” and then “Sponsored Projects”
3. Click “Start New Proposal”



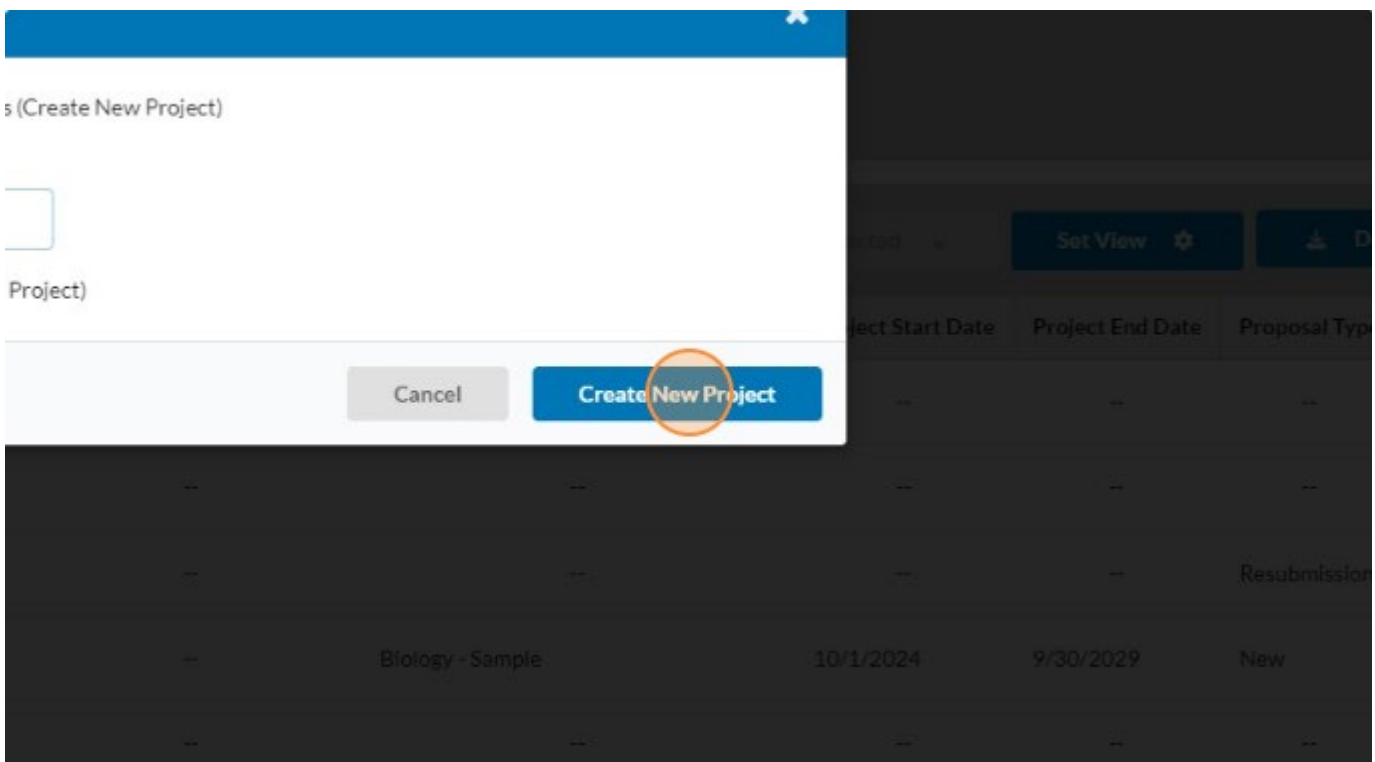
4. **Always** select “This proposal *is not* related to any existing proposals or awards (Create New Project)”



5. Enter the project title using the following naming convention:
“LastName_FirstName_SponsorNameAbbv._ProgramNameAbbv._DueDateMnth/Yr”
e.g. Smith_Jane_NSF_CAREER_072024



6. Click “Create New Project”



7. The record will open to the Proposal Form. Begin filling in the form.

The screenshot shows the top portion of a web application. On the left, under 'My Actions', there are two buttons: 'Complete Review' and 'Route for Review'. On the right, under 'Proposal Summary', there are labels for 'PI: --', 'Admin Unit: --', 'Sponsor', 'Prime Sponsor', 'Sponsor Deadli', and 'Total Sponsor Co'. Below these is a navigation bar with tabs: 'Proposal Form' (circled in orange), 'Routing', 'History', 'Access', 'Tasks', 'Notes', 'Attachments', 'Links', and 'Admin Only'. The main content area is divided into two columns: 'Proposal Sections' and 'PI Instructions'. The 'Proposal Sections' column contains a list: 'PI Instructions' with a green checkmark, 'PI Team' with a red circle containing the number 7, and 'General Information' with a red circle containing the number 12. The 'PI Instructions' column is currently empty.

8. Red circles with numbers indicate the number of required questions that need to be completed in a section. As questions are answered, the number will adjust.

This screenshot shows the 'Proposal Form' interface with the 'General Information' section selected. The navigation bar at the top includes 'Proposal Form' (circled in orange), 'Routing', 'History', 'Access', 'Tasks', 'Notes', 'Attachments', 'Links', and 'Admin Only'. The 'Proposal Sections' column on the left lists: 'PI Instructions' (checked), 'PI Team' (7), 'General Information' (12, circled in orange), 'Budget Information' (14), 'Institutional Compliance' (9), 'Export Control' (10), 'Internal And External Partnerships' (5), and 'Conflicts Of Interest' (1). The 'General Information' section on the right contains a header 'General Information' and several input fields: 'Proposal Due Date: ⓘ *', 'Full Title of Proposal: *', and 'Sponsoring Agency: *'. The 'OFFICES' label is visible on the right side of the page.

9. Red circles with exclamation points indicate there are no unanswered required questions, but the section still needs to be reviewed by the user.

The image shows a sidebar on the left with a list of sections and their counts in red circles: General Information (12), Budget Information (14), Institutional Compliance (9), Export Control (10), Internal And External Partnerships (5), Conflicts Of Interest (1), and Routing Instruction (1). The 'Conflicts Of Interest' section is highlighted with a red circle and an exclamation point icon. The main form area on the right contains the following fields: 'Proposal Due Date: ⓘ *' (with an empty input field), 'Full Title of Proposal:*' (with an empty input field), 'Sponsoring Agency:*' (with a search input field and a dropdown arrow), 'Program Announcement Name and Number:*' (with an empty input field), and 'Project Start Date:*' (with an empty input field). A note below the search field reads: 'If not listed, select *Sponsor Not Listed* and please contact OSPRI.'

10. Fields with an "i" icon indicate there is help text associated with that question. Hover over the "i" to see the information.

The image shows a sidebar on the left with a list of sections and their counts in red circles: Instructions (2), General Information (1), Budget Information (1), Institutional Compliance (1), Export Control (1), and Internal And External Partnerships (1). The 'General Information' section is highlighted with a red circle and an exclamation point icon. The main form area on the right contains the following fields: 'Proposal Due Date: ⓘ *' (with an input field containing '4/26/2024'), 'Full Title of Proposal:*' (with an input field containing 'Sample'), and 'Project Start Date:*' (with an empty input field). A tooltip is visible over the 'i' icon, reading: 'Add the SPONSOR due date here.'

11. Fields with a magnifying glass pull data from lists maintained in the Admin Module. Begin typing your search criteria and select the correct response from the list of returned options.

Institutional Compliance 9

Report Control 10

Internal And External Partnerships 5

Conflicts Of Interest 1

Outstanding Instruction 1

For these personnel, complete the "Name", "Role", and identify the "Internal Association"

View Effort

Percentage

Months

Name ⓘ *

Q Irene

Irene Investigator
rebecca.valenstein@cayuse.com
Biology - Sample

+ Add Internal Association

+ Add Team Member

12. Fields with a caret but no magnifying glass indicate a predefined list within Sponsored Projects.

Project.

0% of total credit has been allocated

Role *

Sponsored Effort

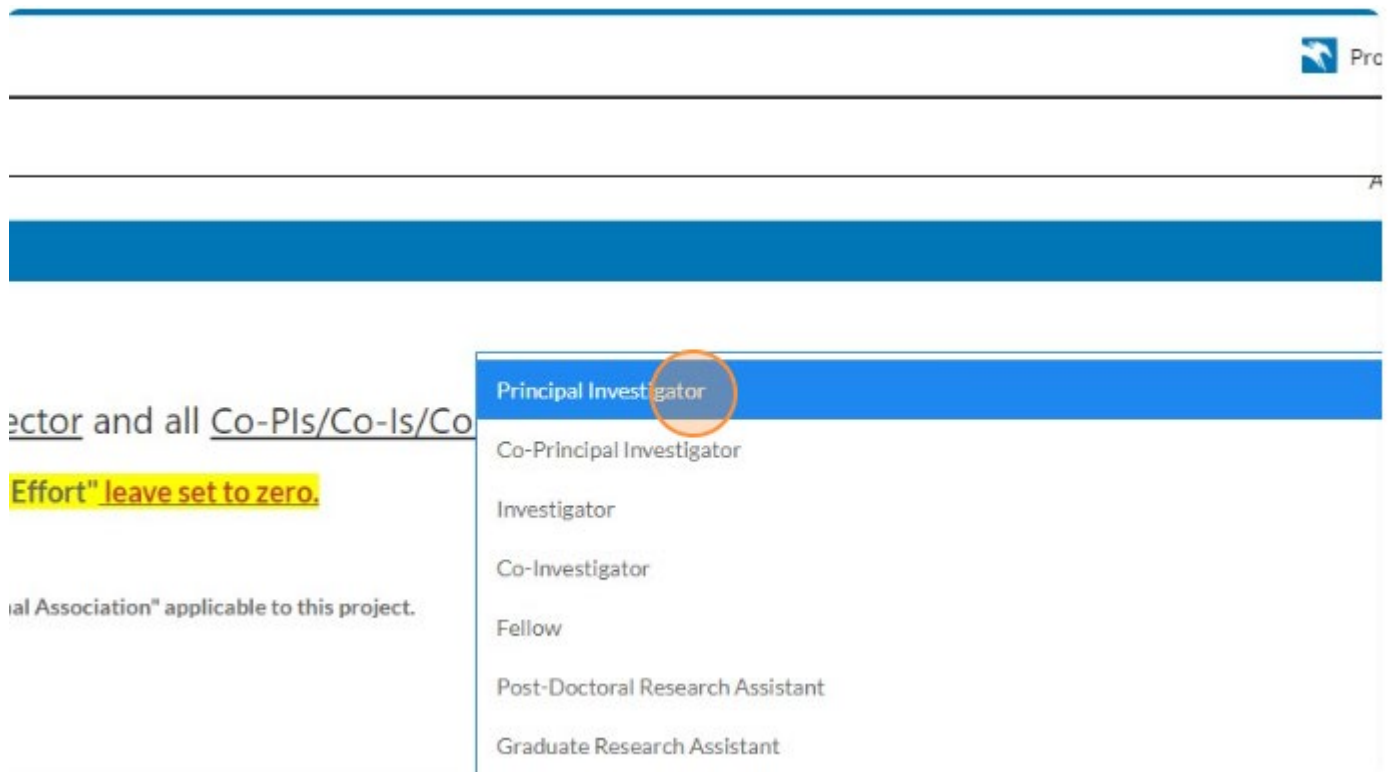
Cost Share Effort

Total Effort

Sponsored Effort		Cost Share Effort		Total Effort
A	S	A	S	
%	%	%	%	-- %

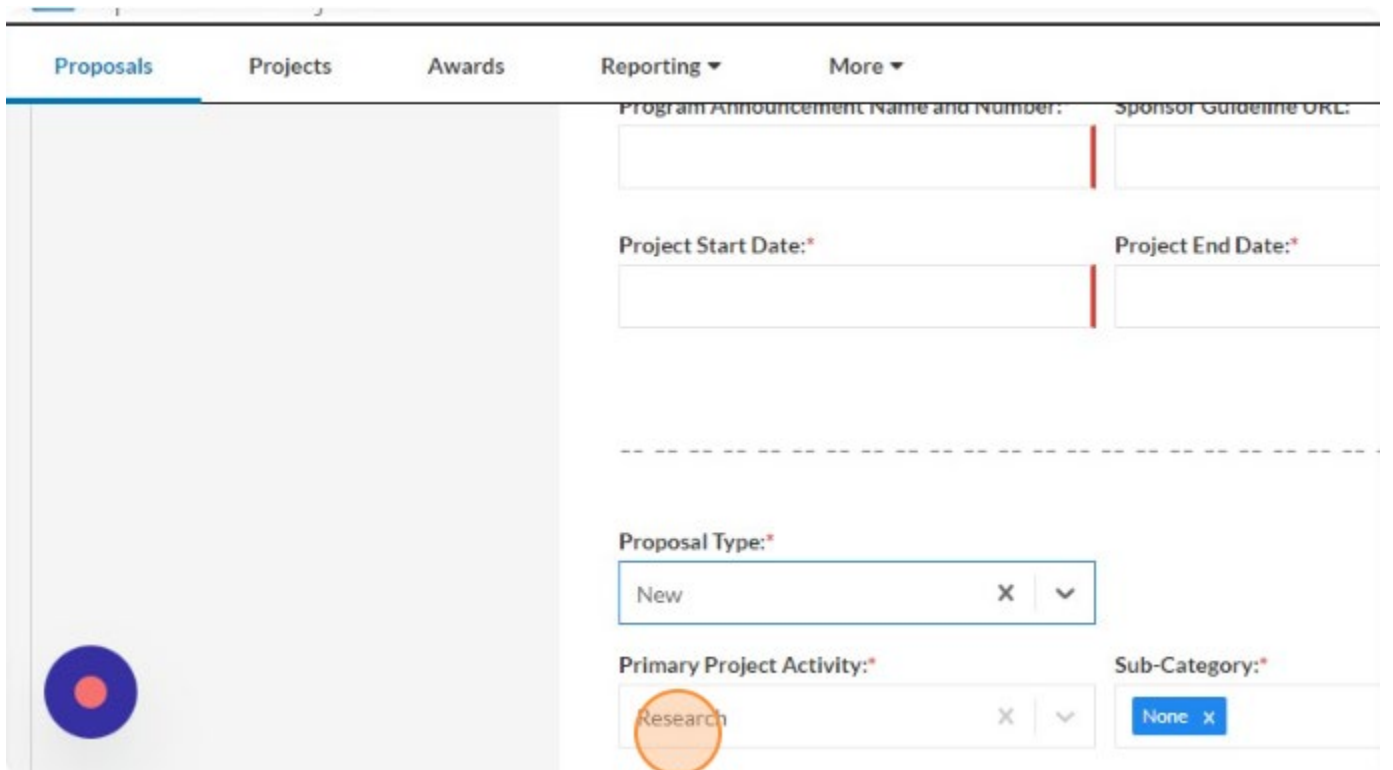
7 asks

13. Select your response from the provided list.



The screenshot shows a dropdown menu for role selection. The menu is open, displaying a list of roles. The role "Principal Investigator" is highlighted with a blue background and is circled in orange. Other roles listed include Co-Principal Investigator, Investigator, Co-Investigator, Fellow, Post-Doctoral Research Assistant, and Graduate Research Assistant. To the left of the dropdown, there is a text field with the label "Principal Investigator and all Co-PIs/Co-Is/Co-PIs" and a highlighted yellow box containing the text "Effort" leave set to zero." Below this, there is a note: "Professional Association" applicable to this project.

14. Dropdown fields with gray responses indicate these are single select fields.



The screenshot shows a proposal form with several dropdown menus. The form has a navigation bar with tabs for "Proposals", "Projects", "Awards", "Reporting", and "More". The "Proposals" tab is selected. The form contains the following fields:

- Program Announcement Name and Number: [Text input]
- Sponsor Guideline URL: [Text input]
- Project Start Date: [Text input]
- Project End Date: [Text input]
- Proposal Type: [Dropdown menu with "New" selected]
- Primary Project Activity: [Dropdown menu with "Research" selected]
- Sub-Category: [Dropdown menu with "None" selected]

The "Research" option in the Primary Project Activity dropdown is circled in orange. The "None" option in the Sub-Category dropdown is highlighted in blue.

15. Dropdown fields with blue responses indicate the ability to select multiple responses.

The screenshot shows a form with several fields. At the top, there are two dropdown menus labeled "Reporting" and "More". Below these are three input fields: "Program Announcement Name and Number:", "Sponsor Guideline URL:", and "Sponsor Guidelines:". The "Sponsor Guidelines" field has a dashed border and contains the text "Drag and drop new files or click to sel". Below these are three more input fields: "Project Start Date:*", "Project End Date:*", and "Submission Date: ⓘ". A note below the "Submission Date" field says "Leave 'Submission Date' field blank. OSPRI after submission." Below a dashed line, there are two dropdown menus: "Proposal Type:*" with the value "New" and "Primary Project Activity:*" with the value "Research". To the right of "Primary Project Activity" is another dropdown menu "Sub-Category:*" with the value "None". The "None" option in the "Sub-Category" dropdown is circled in orange.

16. Fields marked with red asterisks or red bars indicate required fields.

The screenshot shows a form with a navigation bar at the top containing tabs: "Form", "Routing", "History", "Access", "Tasks", "Notes", "Attachments", "Links", and "Admin Only". Below the navigation bar is a sidebar with a list of sections: "Actions", "Information", "Information", "Compliance", "Control", and "And External Partnerships". Each section has a red circle with a number indicating the number of items. The "Information" section is highlighted in blue and has a red circle with the number "12". The "Information" section below it has a red circle with the number "14". The "Compliance" section has a red circle with the number "9". The "Control" section has a red circle with the number "10". The "And External Partnerships" section has a red circle with the number "5". The main content area is titled "General Information" and contains two input fields: "Proposal Due Date: ⓘ*" and "Full Title of Proposal:*". The "Proposal Due Date" field has a red asterisk and a red bar on the right side, and the "Full Title of Proposal" field has a red asterisk. The "Proposal Due Date" field is circled in orange.

17. Once all required fields have been completed and the section has been reviewed, the red circle becomes a green checkmark.

The screenshot displays a web interface for a proposal form. At the top right, there is a label "Total Sp". Below this is a navigation bar with tabs: "Proposal Form" (selected), "Routing", "History", "Access", "Tasks", "Notes", "Attachments", "Links", and "Admin Only".

A blue banner across the middle contains the text "Required questions are complete and section has been viewed". Below this banner is a table of "Proposal Sections":

Section Name	Status
PI Instructions	✓
PI Team	✓
General Information	✓
Budget Information	✓
Institutional Compliance	✓
Export Control	✓

To the right of the table, the word "OFFICES" is visible. Below the table, a horizontal line is present, and the word "Contact" is visible at the bottom right.

18. Once all sections are marked with green checkmarks, the "Route for Review" Button becomes live. Click "Route for Review" to route the record for approval.

My Active Projects / Sample Proposal Record / 24-0095-P0001

Sample Proposal Record

My Actions	Proposal Summary
<p>Complete Review</p> <p>Route for Review</p>	<p>PI: Irene Investigator</p> <p>Admin Unit: Biology - Sample</p> <p>Pri</p> <p>Spons</p> <p>Total Sp</p>

Proposal Form **Routing** History Access Tasks Notes Attachments Links Admin Only

Routing for Review

Review Order ▲	Team
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19. Once routed, the Proposal Form tab locks down and is no longer editable.

Project Start Date:*
1/2024

Project End Date:*
4/30/2029

Proposal Type:*
v

Primary Project Activity:*
Research

Sub-Category:*
None

Type of Research:*
Basic
Applied
Experimental/Development

Click here for definitions for Type of Research.