Researcher FAQ

**GENERAL**

**1. What is Cayuse Sponsored Projects?**

Cayuse Sponsored Projects is the new process for UCCS Routing Form completion and approval. Cayuse Sponsored Projects is a web-based research administration system designed to streamline the management of sponsored projects, including electronic routing and approvals, in-app reporting, and easy access to information about each sponsored project.

2. **Who can access Cayuse Sponsored Projects?**

Cayuse Sponsored Projects can be accessed by researchers, Principal Investigators, research administrators, and other authorized personnel involved in the management of sponsored projects within UCCS.

**3. How do I access Cayuse Sponsored Projects?**

You can access Cayuse Sponsored Projects by logging in with your UCCS credentials through the portal link (<https://osp.uccs.edu/cayuse>) or by visiting the Cayuse platform directly (<https://uccs.app.cayuse.com>).

**4. What can I do with Cayuse Sponsored Projects?**

With Cayuse Sponsored Projects, you can initiate new project records, route the project record for approval, track project progress, upload attachments, generate reports, and facilitate collaboration among project team members. Cayuse Sponsored Projects is the new process for UCCS Routing Form completion and approval.

**5. What resources are available for Cayuse Sponsored Projects training?**

UCCS has many training resources available on the UCCS OSPRI Cayuse webpage (<https://osp.uccs.edu/cayuse>).

Cayuse offers training via Cayuse Academy (<https://cayuse.com/academy/>) and webinars to help users learn how to navigate and utilize Cayuse Sponsored Projects effectively. The Cayuse Support Site (<https://support.cayuse.com/hc/en-us>), also known as the Help Center has additional Sponsored Projects 4.0 information. The Help Center (which requires a separate sign-on) includes Sponsored Projects specific guides, including notes describing product releases.

**6. My login won’t work. Who do I contact for help?**

Check whether you can log in to your MyUCCS Portal. If you cannot log in to the UCCS portal, contact OIT. If you can log in to your UCCS Portal but cannot log in to Cayuse, contact OSPRI.

**7. What are my access permissions in Cayuse? How do I get them changed?**

You can view your roles via the My Profile link under your name in the top right corner of the system. Once in My Profile, click the User Account & Roles link to see what roles you have. Contact OSPRI if you feel you have incorrect roles or internal associations. Most users will only have the SP User role.

**8. Does Cayuse submit my final proposal to the sponsor?**

No. This platform does not link to sponsor submission portals. Cayuse Sponsored Programs exists as the new UCCS Routing Form and as a place to store final proposal documents after submission for record keeping.

**9. What is the reporting feature?**

The reporting feature allows you to customize and generate a report for your own project records and any project records that you have been granted access to.

**PROPOSERS**

**1. How do I start a new project record in Cayuse Sponsored Projects?**

To start a new project record, log in to Cayuse Sponsored Projects, navigate to the appropriate section from the upper right ‘Products’ tab and select ‘Sponsored Projects.’ Next, select the option to create a new record. Fill in the required information and attach any necessary documents before routing the record for approval.

**2. How do I route a project record for approval in Cayuse Sponsored Projects?**

In the project record, ensure that all required sections of the proposal form tab are completed and verify all necessary approvers appear listed on the routing tab. Once ready, select the Route for Review button.

**3. Why can’t I select the Route for Review button?**

If this option is unavailable to you, ensure that every proposal form section is complete and shows a green checkmark icon. Refresh the page. If still unable to route for review, contact OSPRI.

**4. Is this Routing Form considered submitted to OSPRI when I click Route for Review?**

No. The routing form must have all approvals in the routing chain completed by the time of your routing form deadline. Allow adequate time for any review required by your department/college/director to ensure you meet the OSPRI deadline.

**5. I started a proposal record that I no longer need. How do I delete it?**

At this time, proposal records that have been started cannot be deleted.

**6. My project requires additional forms that need approval. Can these also be routed in Cayuse Sponsored Programs.**

No. Cayuse Sponsored Programs cannot route other forms. Any other required

forms (e.g. Cost Share Addendum, F&A Distribution) must be completed outside of Cayuse and uploaded.

**7. Who has access to my routing form?**

Anyone who has been identified on the PI Team has access to the record. Approvers will have view access. You may give additional users either view or edit access by using the Access tab feature when the routing form is in the “In Development” stage.

**8. I am working with external partners and organizations on my project. Can they be granted access to UCCS Cayuse Sponsored Programs to view the project record?**

No. Only UCCS personnel have access to the platform.

**9. I want to add my department admin staff to the routing form to help me fill it out. How do I do this?**

You can add users to each record via the Access Tab. Users can be given edit or view access. Verify with your department who should have which permissions.

**10. I need to give access to my routing form to someone who is not a member of the PI Team or an Approver, but the form was already routed and approved, what do I do?**

The access tab functionality is only available when your routing form is in an editable state (In Development). If the form has already been routed and you need someone else, such as a department administrator, to have view access, contact OSPRI. OSPRI is the only one who can change the status of the form to 'In Development,' so it is critical you ensure everyone who needs access to your routing form has it before you route.

**11. I can see other roles listed on the PI Team tab of the Proposal Form. Can I identify other Team members and roles in this section?**

No. Do not identify additional roles. Only UCCS individuals with the following roles should be identified: Principal Investigator, Co-Principal Investigator, Investigator, and Co-Investigator.

**12. It looks like the Internal Association for me, or another PI Team member is incorrect. What do I do?**

The Internal Association comes directly from UCCS HR information. If it appears your department/unit is not listed, contact OSPRI.

**13. My sponsor is not shown in the Cayuse pull down menu. What do I do?**

Select the option “Sponsor Not Listed” and contact OSPRI to have the sponsor added. You can route the form with this option selected and OSPRI will correct this field after routing when the sponsor has been added to the system.

**14. My project’s subcontract is not shown in the Cayuse pull down menu. What do I do?**

Select the option “Sub Not Listed” and contact OSPRI to have the subrecipient added. You can route the form with this option selected and OSPRI will correct this field after routing when the sponsor has been added to the system.

**15. I am trying to upload a document, but it is giving me an error. What should I do?**

Individual documents must be less than 75MB. It is suggested you refresh the page and try to reupload. If you upload a file and move too quickly to another tab, this may cause the upload to fail.

**16. The Approver listed as my department chair or center director is wrong. What do I do?**

Department Chair/Director Level Approvers are added to the routing chain based upon the Internal Association selected for each person identified on the Key Personnel Tab. Verify the correct Internal Associations have been selected and contact OSPRI to update the reviewers if the issue remains.

**17. It looks like an approver is missing from the routing list before I Route for Review. What do I do?**

Review the tips on the Routing Instructions section of the proposal form. If there appears to be a missing approver that you are unable to resolve with the listed tips, contact OSPRI.

**18. My proposal requires the Provost to approve. How do I do this?**

The Provost is added to the routing chain when the question “Senior/Key Personnel Colleges/Divisions” on the PI Team tab has included “Academic Affairs/Provost” as one of the answers.

**19. What do I do if my unit requires department admin review of the routing form?**

Department administrators’ review of the routing form is not required for OSPRI to accept the routing form. If your unit requires this approval, please consult with your unit on how this review will occur.

If your unit chooses to require SPAN admin approval, the only way for this to occur in some form via Cayuse is the following: Department administrators can be given view/edit access to the routing form from the Access tab. When given edit access, department administrators can initiate routing, rather than the PI, by clicking “Route for Review.” The ‘History’ tab will record who initiated routing. This optional business process would be to require department admin to initiate routing to confirm they have reviewed.

**20. I want to recall a routing as I hit Route for Review too soon. What do I do?**

It is critical you ensure information is correct prior to routing so your routing is not delayed. Delays in the routing form due to recalling routing are the responsibility of the PI. Changing the record status in the system can only be completed by OSPRI. Contact OSPRI to manually change the record status.

**21. I made a mistake in my answers after I routed for Review and did not notice until after some of the approvers have already signed.**

Reviewers who had already approved will be required to do so again. It is critical you ensure information is correct prior to routing so your routing is not delayed. Delays in the routing form due to recalling routing are the responsibility of the PI. Contact OSPRI to manually change the record status so that you can correct the information for your proposal.

**22. How do I check the status of routing?**

Records in the “Under Review” status are working through the routing process. You can check the Routing Tab of each record to see record-specific routing information and status.

**23. Some of the Approvers have still not approved. Does the system send reminders to approvers that they need to complete routing?**

No. The system does not send reminders to approvers. When the form is routed for review, approvers receive one email when the routing chain gets to their ‘Review Order’ level. If you are still waiting on approvers, it is recommended that you reach out to them via email and include the link to the Cayuse site: https://uccs.app.cayuse.com/

**24. Can I attach a document to my routing form after it has been routed for review?**

Yes, the Attachment Tab on the proposal record is always accessible.

**25. Can I assign a task to multiple people?**

No. At this time, you can only assign a task to one individual.

**26. Does the task feature send reminders?**

No. At this time, a task sends one immediate email to the person assigned. There are no additional follow up email reminders. The task created continues to live in the record on the tasks tab where those with access to the record can view it.

**27. Do I upload my "Complete Proposal Package" to Cayuse to meet the OSPRI “Complete Proposal Package” Deadline?**

No. This process, beyond the routing form being through Cayuse, has not changed. The complete proposal package is still due to OSPRI in one of two ways. 1) when there is a sponsor portal, all required proposal documents should be uploaded to the appropriate portal (grants.gov, research.gov, era.nih.gov, etc.) by your OSPRI Deadline; and 2) if there is no sponsor portal to upload materials, you must email OSPRI all required proposal documents by your OSPRI Deadline.

**28. Is my proposal budget and justification for OSPRI’s review supposed to be uploaded to Cayuse Sponsored Programs instead of emailed to OSPRI?**

No. Your final budget and budget justification must still be emailed to OSPRI for OSPRI’s review and approval. This process has not changed.

You will also attach a copy of your budget to Cayuse Sponsored Programs routing form for approvers to review. This is the same process as before for routing, but you will attach documents in Cayuse routing rather than to a pdf.

**29. Can I use the attachment tab to store all my proposal documents?**

Final proposal documents may be uploaded to Cayuse under the attachments tab after submission. These files should be named to indicate they are final. Drafts of proposal documents should not be uploaded to Cayuse attachments. (The only draft document which may live in Cayuse would be the single draft of your budget/justification that you uploaded as part of the routing process.)

**30. Why are my recently submitted proposals or awards not showing in Cayuse Sponsored Programs?**

Legacy data will not be available in UCCS Cayuse Sponsored Programs. We appreciate your understanding during this time as we transition to this new platform which will capture project record data moving forward.

**APPROVERS**

**1. I will be out of the office soon; how do I delegate my approval to someone else?**

Contact OSPRI to update the reviewers. Each college automatically has both the Dean and Associate Dean included in routing, and only one must approve. If both individuals will be out of the office, contact OSPRI. If there are other approvers listed on the Routing Tab that will be out of office, notify OSPRI as soon as possible so the reviewers can be updated. If the form has already been Routed for Review, depending upon where the reviewer update occurs in the routing chain, OSPRI will have to return the form to In Development and all approvers who had already approved will have to do so again.

**2. I have delegated approval to someone else, but I am still getting an email from Cayuse that says I need to approve. What do I do?**

Multiple approvers per unit are automatically in place to prevent complications should one approver be unavailable. Cayuse will automatically send an email to all approvers for a unit even though only one person must approve. It cannot be changed to send email notice to only one approver. Units must determine their own business process for approval regarding who should click the link in the approval email and who does not need to respond.

**3. I don’t want to approve this because I have a question or concern. What do I do?**

If you are an approver, choose Return to In Development instead of Approve and explain why you are not approving. Note, when you choose Return to In Development no email is automatically sent to the PI, so you may wish to reach out.

If you are a certifier (PI, Co-PI, Co-Investigator, or Investigator), contact OSPRI to discuss your concerns and they can determine how to proceed.

**4. Can I approve from my phone, or must I be at my computer?**

You can technically access Cayuse from your phone, though it is not optimized for mobile devices. You can use your phone to view, certify, and approve SP Proposals and Awards. More detailed tasks will be easier to manage through a computer browser.

**5. Why is the form requiring me to approve multiple times?**

Approvers are added to the routing chain per PI Team member based upon internal associations (departments). As an example, if there are two PI Team members with a Biology Department association, the Biology Department Chair must approve twice (once per named individual).

Additionally, if someone was missing from the routing chain when the PI selects “Route for Review,” a correction must be made to add this missing individual to the routing chain, and the routing chain starts over.

**6. The approval button is gray, and I cannot click to approve. What do I do?**

If this option is unavailable to you, ensure that every proposal form section is complete and shows a green checkmark icon. Refresh the page. Additionally, you cannot approve until routing has gotten to your ‘Review Order’ number (see routing tab). E.g. If your Review Order number is “4” you will not be able to approve until those in Review Order 1-3 have completed their reviews. If you are still unable to approve after these tips, contact OSPRI.