

## 10 Quick Steps to Building a Proposal in Cayuse 424

### Step 1: Log in to Cayuse 424.

- a. Enter your Cayuse 424 URL: <http://ucsb.cayuse424.com>
- b. Enter your Username and Password. Click *Sign in*.
  - a. The Username your UCSBNetID
  - b. The password is your UCSB Net ID password. For help with your Net ID and password go to: <http://www.identity.ucsb.edu/>.



### Step 2: Set up or update your Professional Profile.

Professional Profiles have been set up under the People tab for all current PIs. It is your responsibility to keep your profile updated. Only you have access to change your profile information, unless you grant permission to others. You may upload and store multiple biosketches in your Professional Profile. Any PI without a Professional Profile must create one prior to starting a grant application. Key persons and other significant contributors must have a Professional Profile as well.


### Step 3: Find an Opportunity.

The Opportunities tab displays a list of federal funding Opportunities that have been downloaded into Cayuse 424 from Grants.gov. To retrieve an Opportunity from Grants.gov, you must know the Opportunity Number or CFDA Number. Once you have one of these numbers:

- a. On the Opportunities tab, click Download *Opportunities*.
- b. Enter the Opportunity Number or CFDA Number.
- c. Click Download *Opportunities*.

Click the Opportunity Details icon  to the left of the Opportunity Number for more information about the Opportunity. Click the Create Proposal  icon to create a proposal using that Opportunity.

### Step 4: Create your proposal.

There are two ways to create a proposal: (a) On the Opportunities tab, click the Create Proposal  icon to the left of an Opportunity; or (b) On the Proposals tab, click *Create Proposal* at the top of the screen.

Per Sponsored Projects policy, your proposal must be named as follows: [Department][OR Record number][PI last name]. For example: **MSI20120001Smith**

### Step 5: Grant proposal permissions to the appropriate people.

The proposal creator is automatically granted full permissions to the proposal. The proposal creator is the only user that can initially grant proposal permissions to other users. As the proposal creator, you must grant the appropriate permissions to other users who require access to the proposal, including other principal investigators and department administrators.

### Step 6: Complete the forms and attach necessary documents.

All forms in the Opportunity are located in the navigation bar on the left side of the screen. Mandatory forms are automatically checked and cannot be unchecked. Optional forms may be checked if you wish to submit those forms to the sponsor.

**Step 7: Build the budget.**

Check your proposal solicitation for specific budgetary requirements (i.e., whether to build a detailed budget, modular budget, or subaward budget). You may specify up to ten (10) budget periods. Cayuse 424 performs budget calculations after you enter salary, personnel effort, fringe benefits, and other required amounts.

**Step 8: Check for errors and warnings in the proposal.**

Cayuse 424 keeps a running list of errors and warnings. Errors reflect problems that will impose a hard-stop rejection at Grants.gov or the funding agency. Errors must be corrected prior to submitting the proposal. Warnings are not critical, but they may cause a proposal to be rejected from the funding agency. Items labeled “Info” are tips and recommendations from Cayuse; they will not prevent the proposal from being submitted.


Click the **Error / Warning / Info** button at the bottom of the proposal to display the validations panel. Click the hyperlink in the validation message to be taken to the field in question. Cayuse 424 will highlight the field that contains the error or warning. The number of Error / Warning / Info messages decreases as you correct the issues.

**Step 9:**

After you have completed the required SF424 forms, uploaded documents in PDF format, and fixed any errors or warnings, please send a hard copy version of the pre-review proposal to the Sponsored Projects Office along with the guidelines, signed data sheet, and any other required forms (ex. Form 99, etc.) We require that the pre-review proposal be submitted to our office 7 days prior to the sponsor deadline. When all review comments have been met, notify your Sponsored Projects team that the proposal is ready to be submitted.

The Sponsored Projects Office will submit your proposal.

**Step 10: Track your proposal after it's submitted to Grants.gov.**

When the proposal is submitted, a Grants.gov tracking number is recorded in the Proposal Submission History. Click the Submission icon  to view the Grants.gov tracking number, date and time of receipt, and submitter.

The Sponsored Projects Office receives a series of emails from Grants.gov indicating receipt and acceptance or rejection of the application. The PI receives an email regarding the status of the proposal. Sometimes this email requests the PI to review and approve the proposal on the funding agency website.

Questions? Please contact the Sponsored Projects Office at:  
cayuse@research.ucsb.edu