



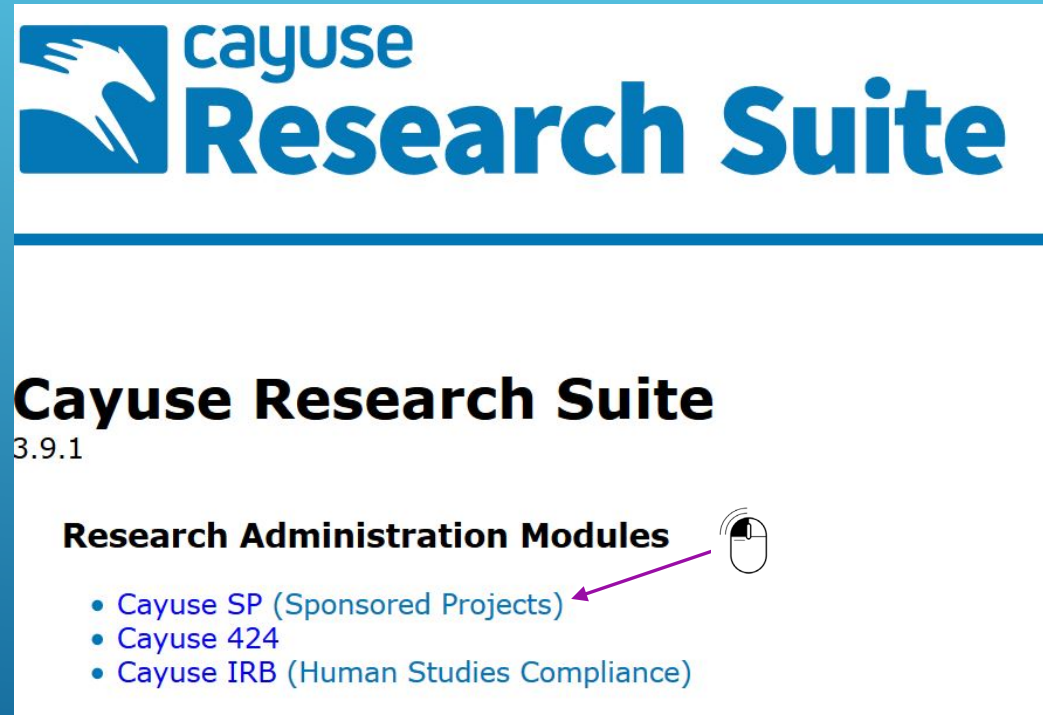
Simplified sponsored project lifecycle management
from proposal creation to award close-out

**CAYUSE SP at Montclair State University: Quick Start Guide for Principal Investigators and Project Directors:
Starting, Routing and Certifying a Proposal for Approval**

Located at:

<https://montclair.cayuse424.com>

First Step: Log-in to [CAYUSE Research Suite](#) using your MSU NET ID:



Navigating the CAYUSE SP Dashboard

Proposal Dashboard

Start New Proposal >>

[My Proposals](#)

[Proposals In My Unit](#)

Award Dashboard

[My Awards](#)

[Awards In My Unit](#)

Certifications/Approvals

[PI Certification Inbox](#)

[Unit Approval Inbox](#)

Office of Sponsored Programs

1 Normal Ave. NURS/GRAD 415
Montclair, NJ. 07043-1624

Phone: 973-655-4128

Email: osp@montclair.edu

Start a New Proposal



Click here to start your proposal!

Find a previously started proposal as a member of the Investigators/Research Team.

Certify a proposal for routing and approval as a Lead PI, or Co-Investigator

Need Help? Contact osp@montclair.edu and/or extension 4128.

Completing the General Information Page

For each section of the Institutional Processing Form, or "IPF," high-level instructions are included in the header.

> Start New Proposal

Please provide general information about your proposal in the fields below. Click "save" at the bottom of the page when this section of the Internal Processing Form (IPF) is complete.

The "Admin Unit" is the home unit/department of the Lead Investigator, who should also be listed as the "Primary Administrative Contact."

If the proposal is affiliated with a University Center or Institute, please add the affiliated center below.

* Indicates Required Fields

Sponsor Information

* Sponsor: ⓘ 🔍

Funding Opportunity/Sponsor application No:

Sponsor Program Name:

Proposal Guideline URL:

Prime Funding Agency: 🔍

General Proposal Information

* Admin Unit: 🔍

* Primary Administrative Contact: 🔍

Proposal Owner:

Project No:

* Short Project Name: (internal reference name)

* Project Start Date: mm/dd/yyyy

* Project End Date: mm/dd/yyyy

* Activity Code: [Click Here to Choose Activity Code](#)

* Proposal Type:

* Instrument Type:

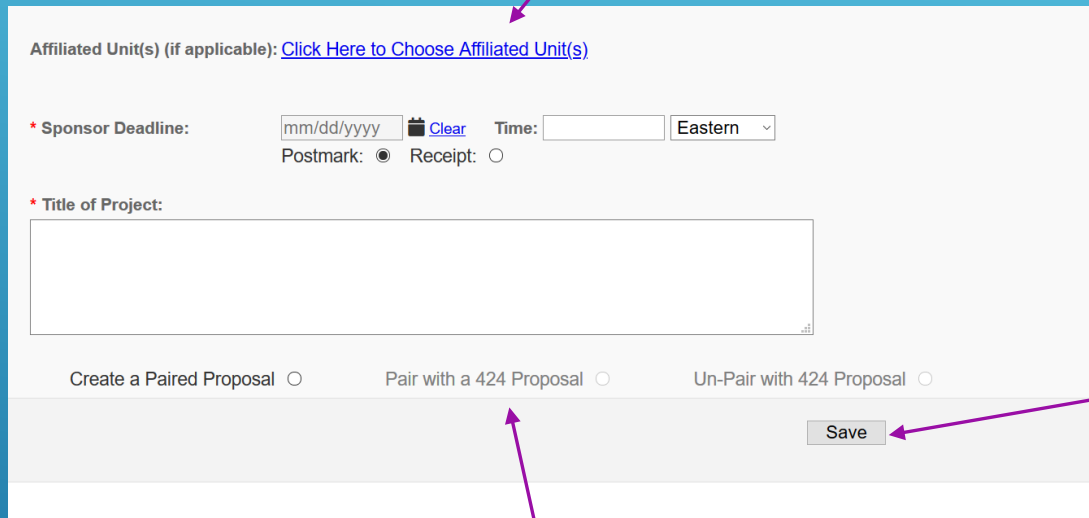
If sponsor isn't listed, type and Select "not found"

Must be lead Principal Investigator/Project Director. Select Lead PI's/PD's home department.

E.g., [Basic, Applied, Developmental Research, Instruction, Equipment.](#)

Completing the General Information Page (continued)

If proposal is submitted and/or affiliated with a University Center or Institute, select here.



A screenshot of a web form titled "Completing the General Information Page (continued)". The form includes several fields and options:

- Affiliated Unit(s) (if applicable):** A link labeled "Click Here to Choose Affiliated Unit(s)" is highlighted with a purple arrow.
- * Sponsor Deadline:** A date input field with a placeholder "mm/dd/yyyy", a "Clear" button, a "Time:" label, and a dropdown menu currently set to "Eastern".
- Postmark:** Two radio buttons, "Postmark: ☒ Receipt: ☐".
- * Title of Project:** A large text input field.
- Buttons:** Three radio buttons at the bottom: "Create a Paired Proposal ☐", "Pair with a 424 Proposal ☐", and "Un-Pair with 424 Proposal ☐". A "Save" button is located to the right of these options, with a purple arrow pointing to it from a text box.

Save your work!
Always click "Save" after completing a section.

You can link to a CAYUSE 424/Grants.gov Proposal here! E.g. NIH, USDA, Dept. of Education. (See separate "Quick Start" on Linking to a 424 proposal.)

Completing the Investigators/Research Team Page

Item List 17-0190

View or Edit completed sections by clicking the name next to the check.

General Information >>

[Investigators/Research Team](#)

[Budget](#)

[Financial Conflicts of Interest in Research](#)

[Regulatory Compliance](#)

[Subrecipients](#)

[Foreign Activity](#)

[Special Interest](#)

[Additional Questions](#)

[Location of Sponsored Activities](#)

[Proposal Abstract](#)

[Proposal Attachments](#)

[Approving Units](#)

[Submission Notes](#)

Submit for Routing



>> Investigators/Research Team

This section provides valuable personnel information for the reviewer(s) of your proposal, and for reporting purposes. Please include each of the key personnel that will contribute to your proposed project.

Lead Investigator = Lead PI/PD, Principal Investigator = Co-Investigator/Co-PI, Investigator = Senior Personnel.

"Allocation of Credit" does not apply at MSU. Please leave blank.

Key Personnel's home Unit/Department will automatically populate, however if this proposal is with an affiliated Center or Institute, this can be changed.

Please approximate the average of person-months effort committed per year, as well as sponsored effort and cost-shared effort you expect to commit to this project.

NOTE: The sum of allocated credit on this proposal is currently 0%.

Add Personnel Information

* Last Name:	<input type="text"/>	<input type="text"/>	* Unit:	<input type="text"/>
* First Name:	<input type="text"/>	<input type="text"/>	* Role:	Select Role...
Phone:	<input type="text"/>	<input type="text"/>	* Sponsored Effort %:	<input type="text"/>
Email:	<input type="text"/>	<input type="text"/>	Cost Shared Effort %:	<input type="text"/>
* <u>Person Months:</u>	<input type="text"/>	<input type="text"/>	Allocation of Credit %:	<input type="text"/>

Save Personnel

Approximate

Leave Blank

Approximate

Enter each key person that will participate on your project, starting with the Lead PI. Each person's "home unit" will autofill. Select role. (Note instructions in the header on role!)

Completing the Budget Page: Basic Budget Information

Item List 20-0029

View or Edit completed sections by clicking the name next to the check.

✓

General Information

✓

Investigators/Research Team

Budget >>

Subcontractors

Conflict of Interest

Regulatory Compliance

Export Control

Intellectual Property

Location of Sponsored Activities

Additional Questions

Proposal Summary

Proposal Attachments

Approving Units

Submission Notes

Administer Proposal

Submit for Routing

Authorize Proposal

Reject Proposal

As you move through each section of the IPF, a green check mark indicates completion!

>> Budget

For paired CAYUSE 424 proposals submitted to Grants.Gov (e.g. NIH, Dept. of Education, USDA), select "Autofill budget." Your budget will populate using the autofill feature.

For a non-paired proposal (NSF Fastlane, Non-Federal, etc.) manually enter just the summary budget information:

- For # of Budget Periods, select "1." and enter only the total direct and indirect costs of your project for the entire project period (e.g. 1-5 years)
- Do not enter the F&A base and uncheck the "use calculated values" checkboxes

* Indicates Required Fields

Overview

Lead PI:

Dr. Lead PI

Sponsor: National Institute of General Medical Sciences (NIH-NIGMS)

* Budget Form:

Summary

Select one of the above:
Summary: View direct costs, indirect rates, bases and totals (default setting)
Detailed: View specific budget categories, indirect rates, bases and totals
Autofill: View detailed budget data autofilled from 424 proposals, if paired

* # of Budget Periods:

1

Project Dates:

	Current Period	Entire Project
* Start	<input type="text" value="mm/dd/yyyy"/> Clear	06/01/21
* End	<input type="text" value="mm/dd/yyyy"/> Clear	05/31/24

Comments:

(512 chars max)

Cost Sharing

* Does this proposal include institutional and/or third party committed cost-sharing or matching? See [OSP Sponsored Programs Handbook](#) for definitions of types of cost-sharing.

Add the unit/department that is committing the cost-share, the period total, the commitment type, match type and type in account (e.g. salary, fringe, travel, materials).

☐ Yes ☐ No

For a "linked" Cayuse 424/Grants.gov proposal, select "Autofill" from the drop down menu.

All other non-linked proposals : Select "Summary" budget and "1" for number of budget periods. Enter the project dates and budget for the entire project period (i.e., 1-5 years.).

Completing the Budget Page (continued): Cost-Sharing/Matching

Select the Department/Unit committing to the cost-share.

Cost Sharing

* Does this proposal include institutional and/or third party committed cost-sharing or matching? See [OSP Sponsored Programs Handbook](#) for definitions of types of cost-sharing.

Add the unit/department that is committing the cost-share, the period total, the commitment type, match type and type in account (e.g. salary, fringe, travel, materials).

☒ Yes ☐ No

If yes, please fill in below:

Internal Cost Sharing
[Add Unit](#)

Unit	Account
No records found.	

Third-Party Cost Sharing
[Add Organization](#)

Organization	Account
No records found.	

F&A Rates

--	--	--

☒ Use calculated values:

F&A Rate (3):	0.000 %	0.000 %
* Effective Rate:	0.000 %	0.000 %

Add Internal Cost Sharing - Mozilla Firefox

https://montclair.cayuse424.com/1099/ramses/views/budget

Add Internal Cost Sharing

Unit:

Period Total: \$

Project Total: \$ 10,000

* Commitment Type:

* Match Type:

* Account: TBD if not known

Comment:

Instructions

For account, type in the sub-type of cost-share. E.g., Salary & Fringe, Materials and Supplies, Travel, etc.

Add any comments you may have here. E.g, why is cost-share required? At what rate?

When finished, click on "Add Unit." Additional cost-share units may be added after this step.

Completing the Budget Page (continued): Direct Costs, Indirect Costs and Additional Resources

F&A Rates

		Current Period	Entire Project
	F&A Rate (1):	0.000 %	0.000 %
	F&A Rate (2):	0.000 %	0.000 %
	F&A Rate (3):	0.000 %	0.000 %
Use calculated values: <input checked="" type="checkbox"/>	* Effective Rate:	0.000 %	0.000 %

* The Effective Rate is for reporting purposes. To report different rates than those calculated, uncheck the box and enter the percentage values.

Budget Categories

		Current Period	Entire Project
	SPONSOR DIRECT COSTS:	\$ 0	\$ 0
	BASE for F&A Rate (1):	\$ 0	\$ 0
	BASE for F&A Rate (2):	\$ 0	\$ 0
	BASE for F&A Rate (3):	\$ 0	\$ 0
Use calculated values: <input checked="" type="checkbox"/>	INDIRECT COSTS (F&A):	\$0	\$0
	FEE:	\$ 0	\$ 0
Use calculated values: <input checked="" type="checkbox"/>	TOTAL SPONSOR PROPOSED COSTS:	\$0	\$0
	Internal Cost Sharing:	\$0	\$0
	Third-Party Cost Sharing:	\$0	\$0
	TOTAL PROJECT COSTS:	\$0	\$0

Additional Resources

* Do you need additional resources and/or support that are not included in the proposal budget to conduct this project--e.g., equipment, space, or other resources. If

☐ Yes ☐ No

Save Reset

Click in the "F&A Rate (1):" Box. From the pop-up menu, select the indirect rate, or manually enter in sponsor-mandated rate.

Enter total Direct Costs for the entire project here.

Uncheck "Use Calculated Values Check Box, and enter Indirect Costs for the entire project.

Check yes, or no. If yes, specify in the pop-up menu.

Click "Save" to move on to the next section of the IPF!

Uncheck!

SP

cayuse
SP

My Dashboard

Reporting

Item List

20-0029

View or Edit completed sections by clicking the name next to the check.

✓

[General Information](#)

✓

Investigators/Research Team

>>

✓

[Budget](#)

[Subcontractors](#)

[Conflict of Interest](#)

[Regulatory Compliance](#)

[Export Control](#)

[Intellectual Property](#)

[Location of Sponsored Activities](#)

[Additional Questions](#)

[Proposal Summary](#)

[Proposal Attachments](#)

[Approving Units](#)

★

[Submission Notes](#)

Competing the Remainder of the IPF

Much of the remainder of the IPF is self explanatory. Note: You will have an opportunity to revise the list of approving units (e.g., add an additional approver) before you authorize the unit list prior to routing your proposal.

ing

Events

More

>> Approving Units

The units/departments listed below will be notified to authorize this proposal record.

Make sure every affiliated unit/department is listed on this screen before submitting the proposal record for routing. The Office of Sponsored Programs will authorize this proposal on behalf of the University. (Do not add OSP as an approving unit.)

Add Approving Unit

Unit:


Add Unit

List of Approving Units: (to edit the information, remove first, then add back)








Routing Order	Unit Code	Unit	Role(s)
1	CC10039	Biology	Admin Unit, Lead Principal Investigator
2	D26	Dean's Office-CSAM	Rollup From - CC10039

Authorize Unit Listing

Completing the IPF: Submit for Routing

Item List **20-0029** 

View or Edit completed sections by clicking the name next to the check.

-  [General Information](#)
-  [Investigators/Research Team](#)
-  [Budget](#)
-  [Subcontractors](#)
-  [Conflict of Interest](#)
-  [Regulatory Compliance](#)
-  [Export Control](#)
-  [Intellectual Property](#)
-  [Location of Sponsored Activities](#)
-  [Additional Questions](#)
-  [Proposal Summary](#)
-  [Proposal Attachments](#)
-  [Approving Units](#)
-  [Submission Notes](#) 

>>Submission Confirmation

Are you sure you wish to submit this Proposal Record?

Clicking YES to submit this proposal for routing and approval will do four things:

1. the Institutional Proposal Form (IPF) and proposal will be locked and can no longer be edited (except by the Admin Unit/Department);
2. the IPF and proposal will be routed to all affiliated units/departments for review and approval. Should any of these units return the proposal record, the unit/department approver(s) will be notified by email of the return and for what reason(s);
3. each PI(s) listed on the research team will be notified by email that they must also certify the proposal Cayuse SP
4. Finally, the proposal record will arrive in OSP for final review and approval.

Throughout these steps you, your PI, and any other contributing members listed on the Proposal Record will be able to track its review and approval status in Cayuse Sponsored Projects.

Once all affiliated units have approved the Proposal Record, you will receive an email indicating that it was successfully routed and received in OSP.

After completing each remaining section of the IPF, the "Submit for Routing" Box will be available. You may then submit your proposal for routing!

My Dashboard

Proposal Dashboard

[Start New Proposal](#)

[My Proposals](#)

[Proposals In My Unit](#)

Award Dashboard

[My Awards](#)

[Awards In My Unit](#)

Certifications/Approvals

[PI Certification Inbox >>](#)

[1 Unit Approval Inbox](#)

Office of Sponsored Programs

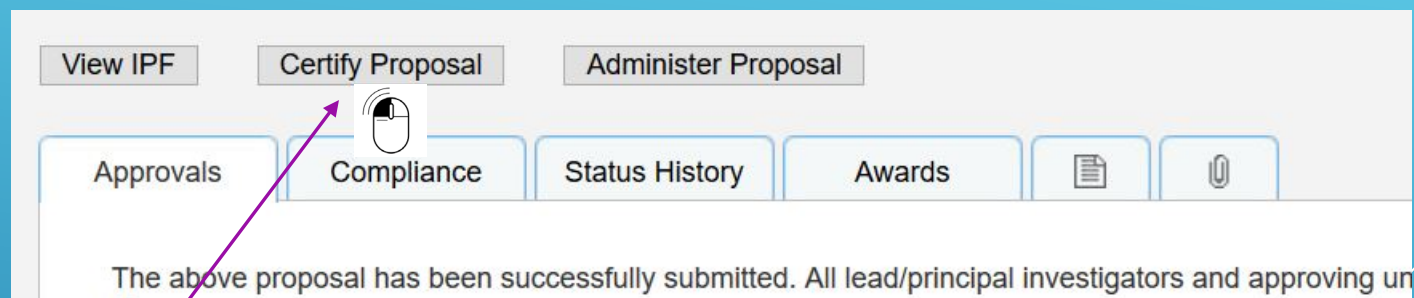
1 Normal Ave. NURS/GRAD 415
Montclair, NJ. 07043-1624

Phone: 973-655-4128

Email: osp@montclair.edu

Completing the IPF: Certifying your Proposal

From the “My Dashboard” drop-down menu, select PI Certification Inbox. After routing your proposal, each key team member (Co-PI’s and other key personnel) will be required to certify the proposal prior to departmental/unit approval. Click on the “PI Certification Inbox” link here, and select your proposal. Next, click on the “Certify Proposal” button.



Completing the IPF: Certifying your Proposal (continued)

[My Dashboard](#) [Reporting](#) [Events](#) [More](#)

>> Proposal Certification

My signature below, certifies that:

- The information submitted within the application is true, complete, and accurate to the best of my knowledge;
- I will accept (or share, with my co-investigators) responsibility for the financial, scientific and ethical conduct of the project and will provide the required financial and technical/progress reports if a grant is awarded;
- I am fully aware of the [University Financial Conflict of Interest Policy](#) and if applicable, have on file and updated [Significant Financial Interest Disclosure Form](#) with the University Compliance Officer. If a Significant Financial Interest exists now, or in the future in relation to this proposal, I will attach/file an updated significant financial disclosure form.

* Please enter any comments you might have regarding this proposal. *Please note that your return comments will be seen by all approvers in the approval chain.*

Submit Certification

Cancel

Review MSU's standard proposal certification statement. You may add any notes you feel might be useful for reviewers here. When complete, certify your proposal for final department/unit and OSP review and approval!

Checking on the Status of your Proposal:


Unsubmitted=Not yet submitted for routing unit/departmental approval.

From the “My Dashboard” drop-down menu, select “My Proposals.” Then click on the “Submitted Proposals” for routing button. The status of your submission is listed here. With each change in status, you will receive an email. Definitions for each status are on the next, and final slide.

Unsubmitted Proposals

Submitted Proposals

Below is a list of submitted proposals you initiated or on which you are listed.


Submitted Date	Prop No	Lead PI	Project Name	Sponsor	Deadline	My Role	Status	Flags
<input type="text" value="Search"/> x	<input type="text" value="Search"/> x	<input type="text" value="Search"/> x	<input type="text" value="Search"/> x	<input type="text" value="Search"/> x	<input type="text" value="Search"/> x	<input type="text" value="Search"/> x	<input type="text" value="Search"/> x	<input type="text" value="Search"/> x
06/16/2020	20-0029	Frederic Russo	Proposal to NIGMS Short Title	National Institute of General Medical Sciences (NIH-NIGMS)	06/30/2020	Lead Principal Investigator	Dept Approval In Process	Copy 

View 1 - 1 of 1

Page 1 of 1

Export to CSV

Checking on the Status of your Proposal (continued): Status Definitions

- Unsubmitted = Proposal not yet submitted for routing, certification & unit/departmental approval.
 - Dept Approval in Process = Proposal undergoing Departmental/Unit/College and/or Division Approval.
 - OSP Review in Process = Proposal now sits with OSP. Awaiting OSP Pre-Award Review.
 - Approved by OSP = Proposal Approved by OSP for Submission.
 - Reopened = Proposal returned for revision, or reopened by Lead PI.
 - Submitted to Sponsor = Proposal Submitted to Sponsor.
- 
- A series of three parallel white diagonal lines extending from the bottom right corner towards the center of the slide.



- ▶ If you have any questions, contact OSP at osp@montclair.edu