

Approver's Guide

For Cayuse Sponsored Programs

Access

Each Department must have at least one person designated with the "SP Proposal Reviewer" security role within Cayuse. This role provides the ability to review and approve proposals for a specific department.

It is highly recommended that each department have at least one additional person (such as a Department Coordinator or other person) with the SP Proposal Reviewer role to serve as a proxy or back-up for approvals.

Approvals

By approving a proposal the Department Chair, Department Head or College Dean acknowledges:

- ⇒ This proposal is an appropriate activity within the Department/College; and supports the mission and/or goals of the University.
- ⇒ The Department Chair or College is responsible for costs incurred in excess of the award amount and for disallowed unauthorized expenditures.
- ⇒ The Department Chair, Department Head or College is responsible for cost-share shortfalls, both cash and third party / in-kind.
- ⇒ The Department Chair, Department Head or College approves the Research Teams member's eligibility to serve on the proposed project.
- ⇒ The assurance of the completion of Michigan Tech's obligations under any potential agreement with the sponsor.

Routing

The routing in Cayuse follows a similar path for each proposal. Once a proposal is routed for review, the Sponsored Programs team reviews the proposal for accuracy and completeness. When that is complete, the proposal is routed to each member of the Research Team for their certification. Each member of the Research Team then requires approval of the proposal from their designated Department approver.

Notifications

When a proposal is ready for departmental approval, an email notification is sent to each person with the “SP Proposal Reviewer” role for each Research Team Member and also for any affiliated Center/Institute indicated on the proposal form. That email will provide a link to directly access that proposal in Cayuse. Approver tasks can also be viewed in the Cayuse “My Tasks” screen (initial screen at log in). Each line item on the “My Tasks” screen can be clicked on to access the task.

Sample “My Tasks” screen:

Task	Task Type	From	Assigned To	Created	Last Activity	Due	Status
check this	SP Ad Hoc Task	Me	Me	02/21/2023	02/21/2023	02/22/2023	Open
Certify Award - 23-0242-A0001	Other		Me	03/08/2023	03/11/2023		Open
Review Proposal for SPO Team - 23-0246-P0001	Other			03/11/2023	03/11/2023		Open

Sample Email Notifications:

Cayuse Administration <do-not-reply@cayuse.com>
to me

9:14 PM (0 minutes ago)

Dear Richelle Schwaller:

Proposal 23-0246-P0001 for project test for certifications has been routed for internal review.

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

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

Please Review Proposal 23-0292-P0001National Science Foundation (NSF) / Cute Dog Project

Cayuse Administration <do-not-reply@cayuse.com>
to me

Dear Gina LeMay:

Proposal 23-0292-P0001 with National Science Foundation (NSF) has been routed for internal review.

Because you are a member of GLRC, you are required to review based on the following questions and answers:

Center or Institute = Great Lakes Research Center (GLRC)

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

Proposal Review

When selecting the email link or specific task it will take you directly to the proposal record (see sample below).

Proposals Projects Awards Reporting More

Cute Dog Project

[My Active Projects](#) / [Cute Dog Project](#) / [23-0292-P0001](#)

My Actions	Proposal Summary	Under Review
<p>Complete Review</p> <p>Route for Review</p>	<p>PI: Gina LeM... Sponsor: National Science Foundation (...)</p> <p>Admin U... -- Prime Sponsor: -- Project Start Date: 5/23/2023</p> <p> Sponsor Deadline: -- Project End Date: 5/22/2025</p> <p> Total Sponsor Costs: 450000 Instrument Type: --</p>	<p>Project: 23-0292</p>

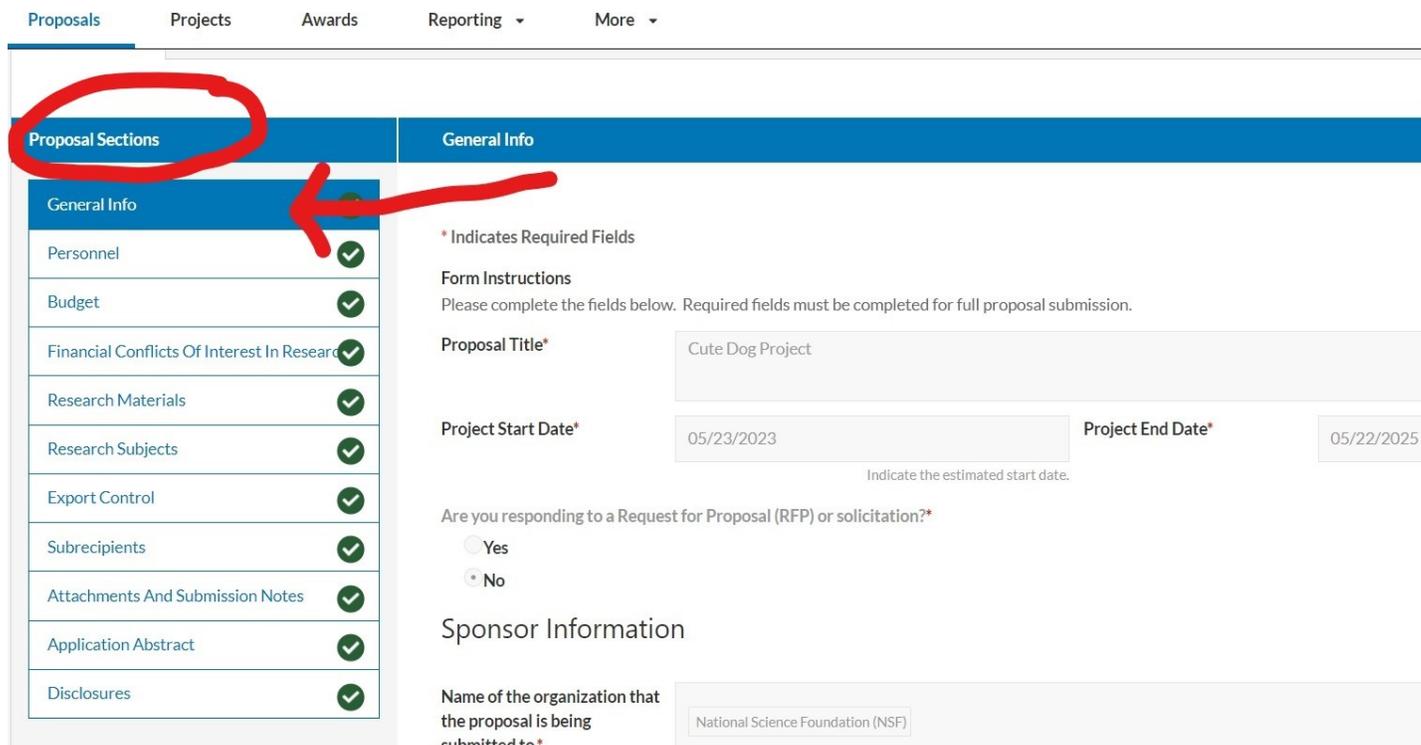
Proposal Form Routing History Access Tasks Notes Attachments Links Admin Only

All changes save automatically

Proposal Sections	Personnel
<p>General Info <input checked="" type="checkbox"/></p> <p>Personnel <input checked="" type="checkbox"/></p> <p>Budget <input checked="" type="checkbox"/></p>	<p>Instructions</p> <p>This section is for building your Research Team. The only information you need to populate in this section are the Name, Role and Internal Association for each team member.</p> <p>Research Team - use only these roles</p>

My Tasks

To perform your proposal review, on the left-hand side of the screen, in the “Proposal Form” tab, you will see “Proposal Sections”, and immediately below you will see sections listed beginning with “General Info”. You may review all or select information in each of the form sections by simply clicking into the section. It will first turn the section name blue and the form page then appears to the right.



As an approver, what should I review? This is difficult to answer as approvers have their own routines, but as an example you could perform a review at the department level by reviewing the following items within the proposal record:

General Info Section:

- Project Start/End Dates
- Sponsor Deadline-Does this proposal meet the timeline requirements?

Personnel Section:

- Research Team-Are the team members who you expected to serve on the project?

Budget Section:

- If cost share applies, does it align with your understanding/commitment?
- Does the sponsor funding align with cost share expectations, if applicable?
- Review the attached detailed budget by downloading the document

Subrecipients Section:

- How much of the work is going to be undertaken by the subrecipient(s)?

Attachments and Submission Notes Section:

- Review the attached Scope of Work, Narrative or Research Plan by downloading the document

Completing the Approval Task

After reviewing the proposal, click on “Complete Review”

⇒ Choose to either “Approve” the proposal, or “Return to In Development”

⇒ Click “Save”

NOTE: Choosing “Return to In Development” does not generate any notifications. If this choice is made, a conversation with Sponsored Programs and the Principal Investigator should be held prior to selection of this decision. A review decision of “Return to In Development” will bring the proposal to the beginning of the proposal process.

CAJUSE Sponsored Projects

Proposals Projects Awards Reporting More

test for certifications
[My Active Projects](#) / [test for certifications](#) / 23-0246-P0001

My Actions	Proposal Summary
Complete Review	PI: Richelle S... Sponsor: National Science Foun...
Route for Review	Admin Un... -- Prime Sponsor: --
	Sponsor Deadline: 3/17/2023
	Total Sponsor Costs: 65000

Proposal Form Routing History Access Tasks Notes Attachments Links

Complete Review for Research Team Research Team

Review Decision*
Approve

Comment
Please add a comment.

Cancel Save

-OR-

Complete Review for Research Team Research Team

Review Decision*
Return to In Development

Comment*
This is my reason

Cancel Save