



How to Review and Approve Cayuse Proposals (Department Chairs, Directors, Deans)

1. After the members of the research team (e.g., PI and Co-PIs) have certified the information in a) the proposal form and b) the documents attached to the form, the applicable **department heads (or directors/deans) will receive an email that contains a direct link to review and approve (or disapprove) the proposal.** A sample email message looks like this:

Please Review Proposal 23-0108-P0001 Johnson: DoE; Where is the windiest place on Earth?



CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe

Dear Christine Johnson:

Proposal 23-0108-P0001 for project Johnson: DoE; Where is the windiest place on Earth? has been routed for internal review.

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

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

2. Once you **click the link in the email message**, the proposal form will be loaded. (You may be asked to login to Cayuse using your OSU O-Key username and password.) Once logged in, you will be directed to a website that looks similar to this.

The screenshot shows the Cayuse Sponsored Projects interface. At the top, there's a navigation bar with 'Proposals', 'Projects', 'Awards', 'Reporting', and 'More'. The main content area displays the proposal title 'Johnson: DoE; Where is the windiest place on Earth?' and a 'My Actions' panel with buttons for 'Complete Review' and 'Route for Review'. A 'Proposal Summary' section shows details like PI: Christine Jo..., Sponsor: U.S. Department of..., Project Start/End dates, and Total Sponsor Costs: 15000. Below this is a 'Proposal Form' section with tabs for Routing, History, Access, Tasks, Notes, Attachments, Links, and Admin Only. The 'Proposal Sections' sidebar shows 'General Information' and 'Investigators/Research Team' as completed. The 'Sponsor Information' section includes dropdown menus for 'Sponsor' (U.S. Department of Energy (DoE)) and 'Prime Sponsor (if applicable)'.



3. **Locate the tabs in the middle of the screen** (i.e., not the tabs at the top). On the left-hand side of the screen, in the "Proposal Form" tab, you will see "Proposal Sections", and immediately below you will see 11 sections listed beginning with "General Information".

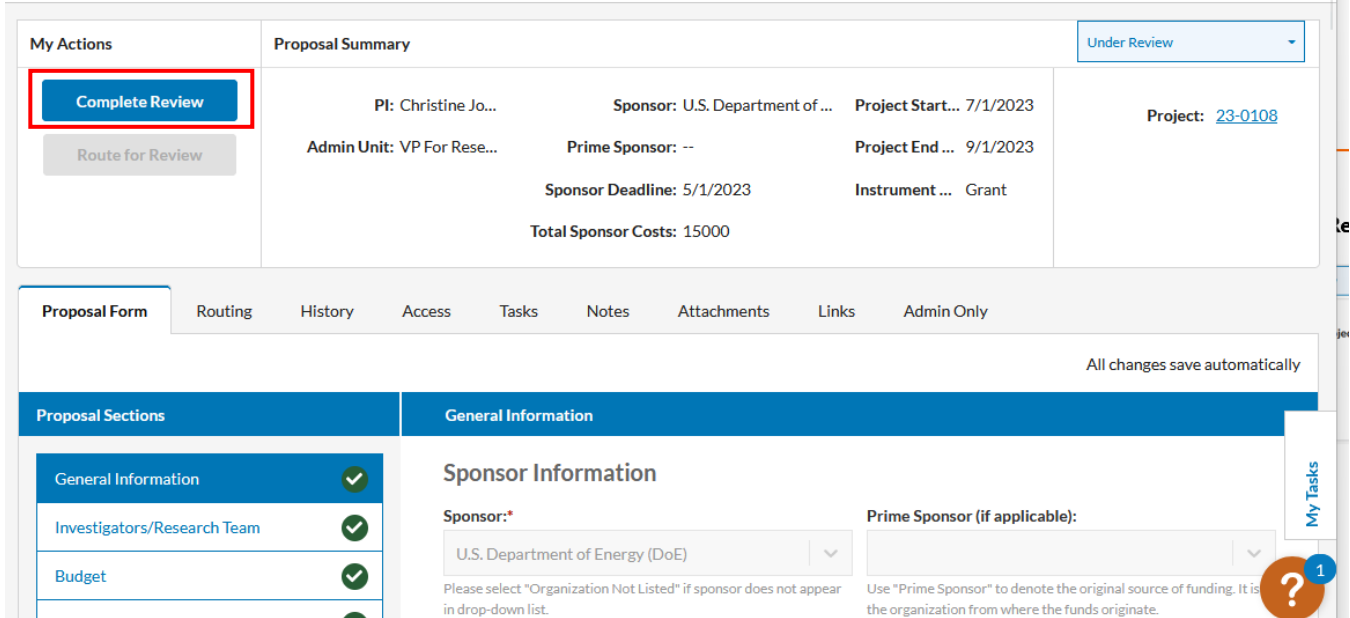
4. **Carefully review all information provided** in each of the 11 sections. As you move from one section to the next, a green check mark will appear which denotes you have reviewed that section's information. (Note: A red exclamation mark indicates you have not reviewed the information in that section.)

How to Approve a Proposal Record

5. To approve the proposal, navigate to the “My Actions” section and click “Complete Review”.

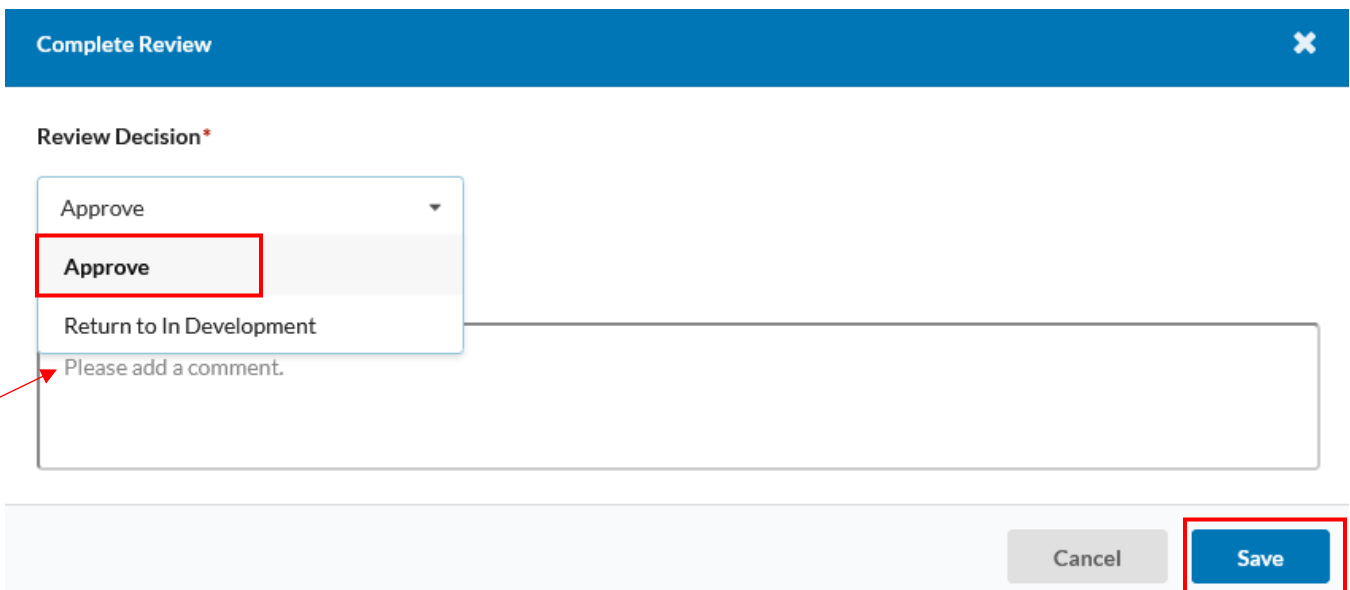
Johnson: DoE; Where is the windiest place on Earth?

[My Active Projects](#) / [Johnson: DoE; Where is the windiest place on Earth?](#) / [23-0108-P0001](#)



The screenshot shows a proposal record interface. On the left, under the 'My Actions' section, the 'Complete Review' button is highlighted with a red box. Below it is a 'Route for Review' button. The main area displays 'Proposal Summary' with fields for PI, Sponsor, Project Start/End, Admin Unit, Prime Sponsor, Sponsor Deadline, Instrument, and Total Sponsor Costs. A dropdown menu at the top right shows 'Under Review'. Below the summary is a navigation bar with tabs: Proposal Form, Routing, History, Access, Tasks, Notes, Attachments, Links, and Admin Only. The 'Proposal Sections' sidebar shows 'General Information', 'Investigators/Research Team', and 'Budget' with checkmarks. The 'General Information' section is active, showing 'Sponsor Information' with a dropdown menu for 'Sponsor:' (currently 'U.S. Department of Energy (DoE)') and a field for 'Prime Sponsor (if applicable):'. A 'My Tasks' sidebar is visible on the right.

6. Select “Approve” from the dropdown menu, enter any optional comments, and click “Save”.



The screenshot shows a 'Complete Review' dialog box. At the top, it says 'Complete Review' with a close button. Below is the 'Review Decision*' section. A dropdown menu is open, showing 'Approve' selected and highlighted with a red box. Other options are 'Return to In Development' and 'Please add a comment.' (indicated by a red arrow). At the bottom, there are 'Cancel' and 'Save' buttons, with 'Save' highlighted in a red box.

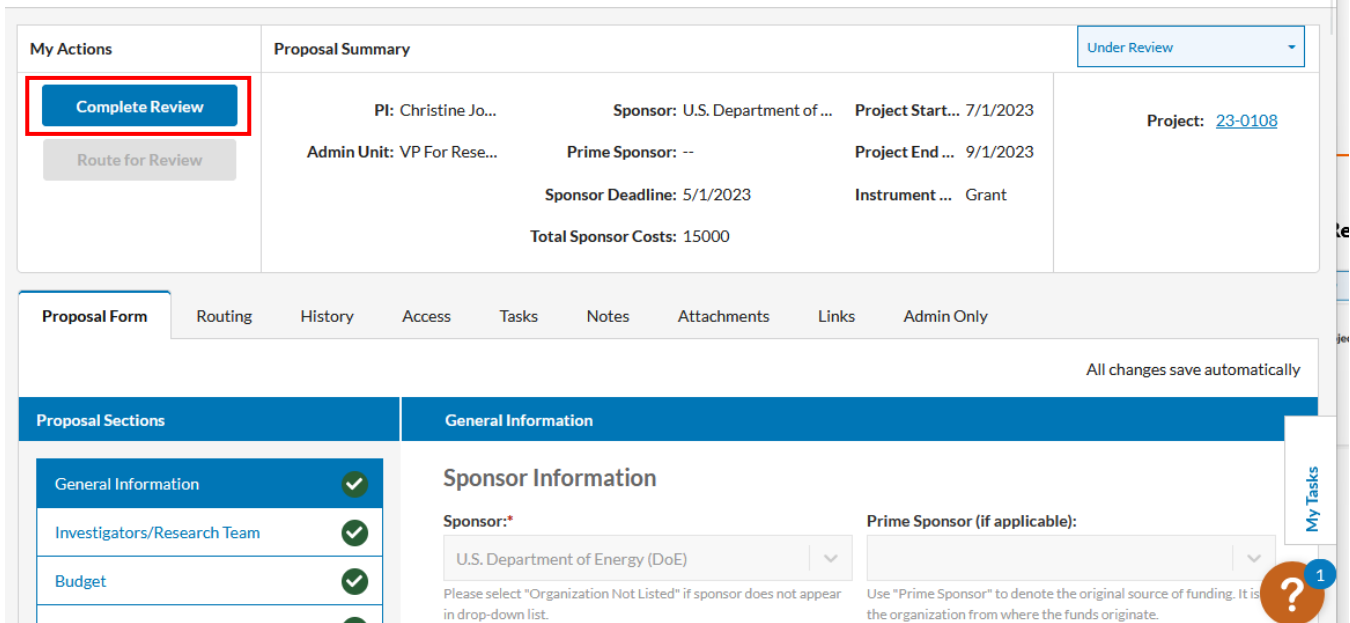
The proposal record is now approved by you.

How to Disapprove a Proposal Record

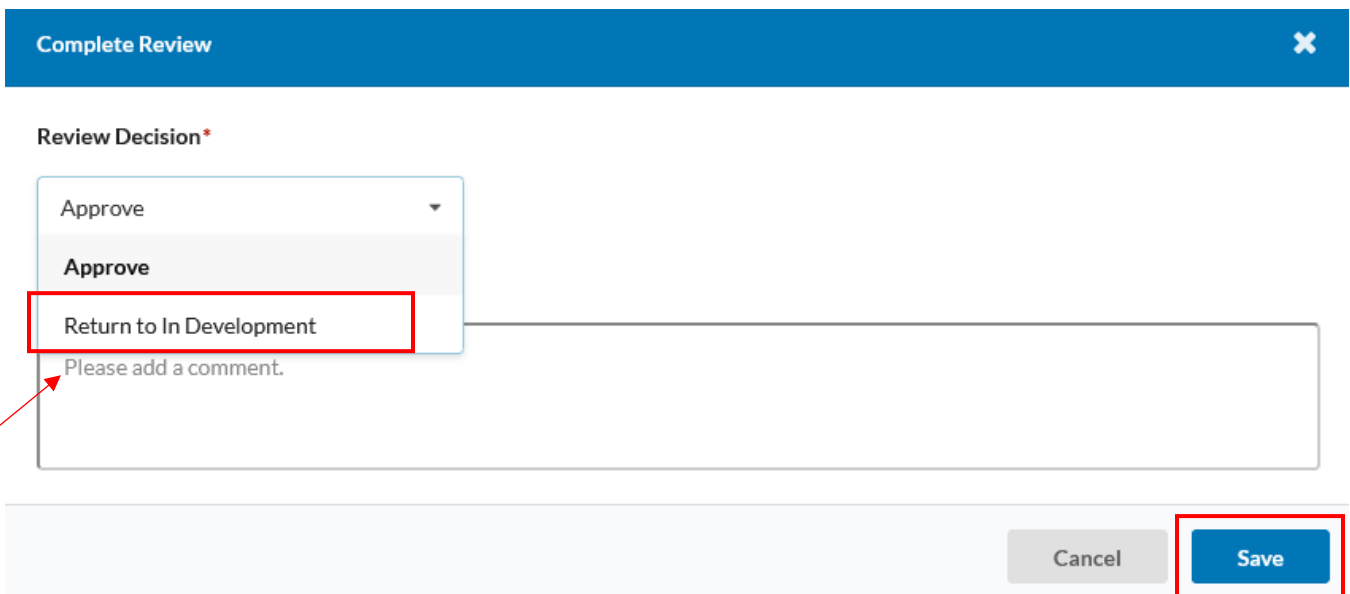
- In the event you do not want to approve the proposal (e.g., you reviewed it and believe it needs changes or corrections), navigate to the “My Actions” section and click “Complete Review”.

Johnson: DoE; Where is the windiest place on Earth?

[My Active Projects / Johnson: DoE; Where is the windiest place on Earth? / 23-0108-P0001](#)



- Select “Return to In Development” from the dropdown menu, and enter the required comments (i.e., the reason for disapproval), and click “Save”.





The proposal record will be returned to an "In Development" status which will allow any corrections to the information in the form. Once the corrections have been made, the proposal will be re-routed from the beginning.