RESEARCH

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?

CA Cayuse Administration <do-not-reply@cayuse.com>
To ● Johnson, Christine

[smiley] ↩ Reply ↩ Reply All → Forward [Teams] ···
Mon 4/3/2023 12:58 PM

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.

cayuse
Sponsored Projects

[icon] Products   Christine

| Proposals | Projects | Awards | Reporting ▾ | More ▾ |

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

My Actions	Proposal Summary			Under Review ▾
Complete Review	PI: Christine Jo...	Sponsor: U.S. Department of ...	Project Start... 7/	**Project:** 23-0108
Route for Review	Admin Unit: VP For Rese...	Prime Sponsor: --	Project End ... 9/	
	Sponsor Deadline: 5/1/2023		Instrument ... Gr	
	Total Sponsor Costs: 15000			

| Proposal Form | Routing | History | Access | Tasks | Notes | Attachments | Links | Admin Only |

All changes save automatically

Proposal Sections	General Information
General Information ✓	**Sponsor Information**
Investigators/Research Team ✓	Sponsor:*
	U.S. Department of Energy (DoE) ▾
	Prime Sponsor (if applicable): ▾

My Tasks

RESEARCH

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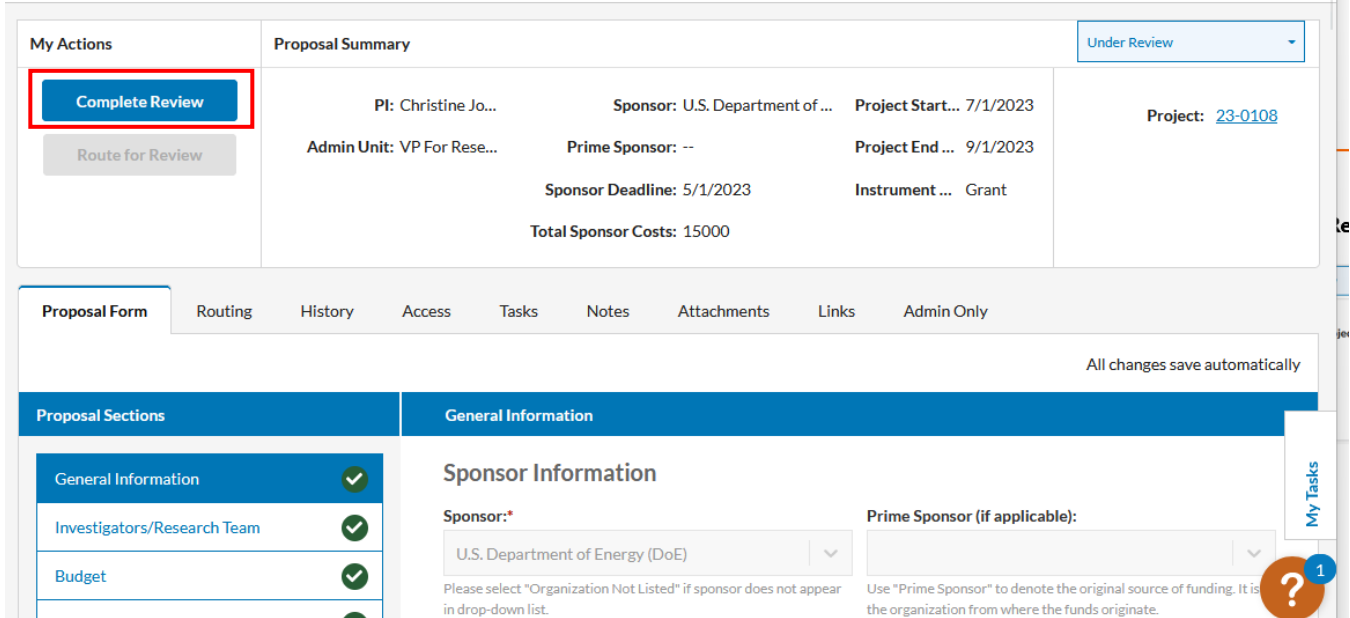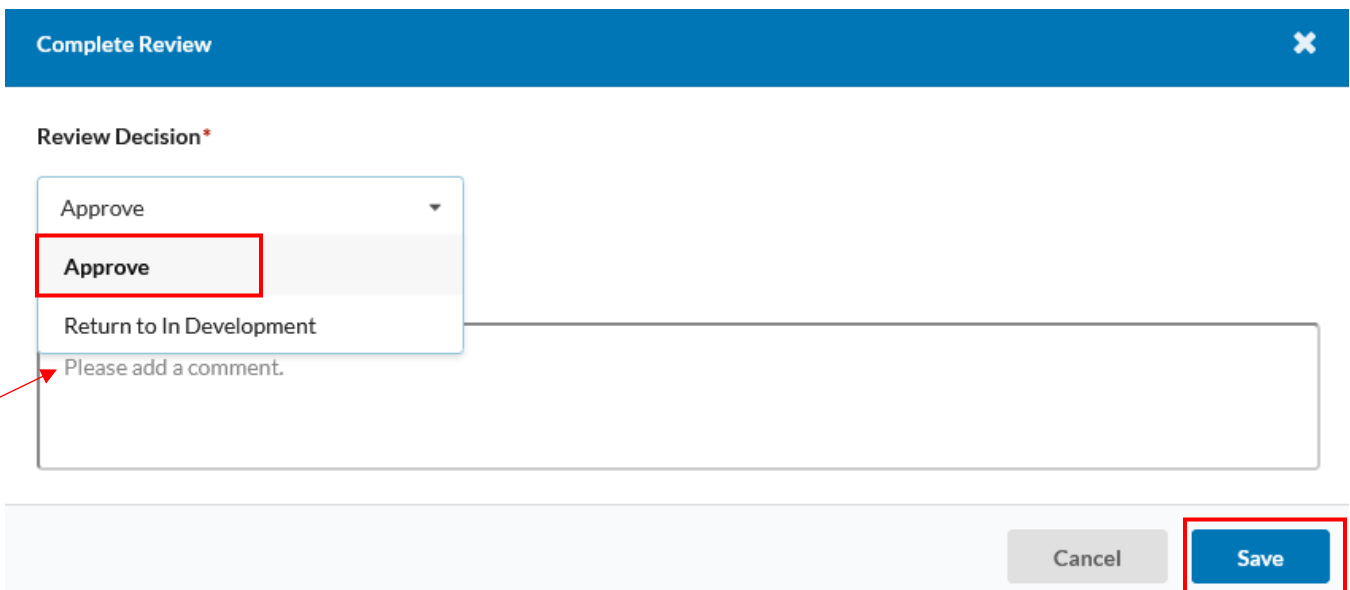

4. **Carefully review all information provided** in <u>each</u> of the 11 sections. As you move from one section to the next, a green check mark will appear which denotes you have reviewed that section's information. (Note: A red exclamation mark indicates you have <u>not</u> reviewed the information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

How to <u>Approve</u> a Proposal Record

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

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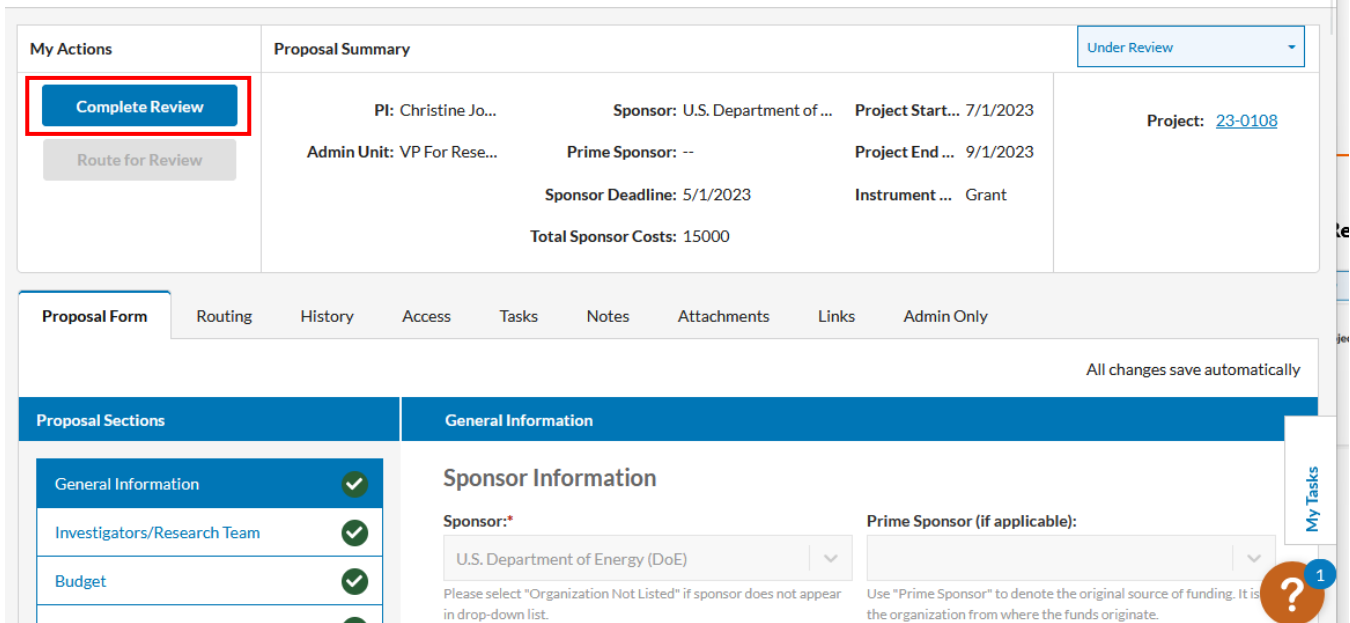

The proposal record is now approved by you.
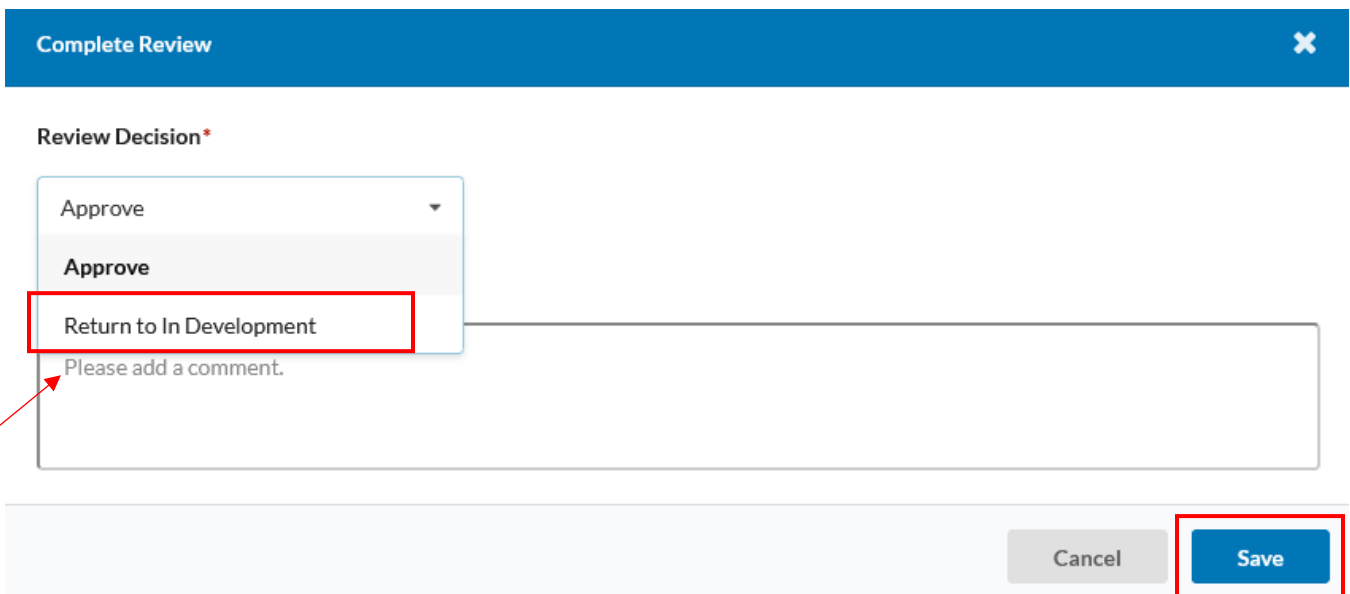
How to **Disapprove** a Proposal Record

7. In the event you do <u>not</u> 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".

8. 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.