

# Welcome to the Cayuse Step-by-Step Guide for Submitters and Approvers!

If you have not used “Cayuse – Sponsored Projects”, please click [Cayuse Access Request](#).

This training guide has three sections:

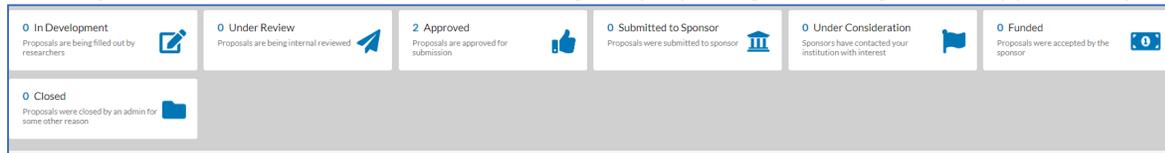
1. Helpful Terms/Cheat Sheet
2. Submitter Step-by-Step
3. Approver Step-by-Step

Definitions Cheat Sheet & Helpful Terms:

**What is a Principal Investigator (PI)?** A PI refers to the holder of an independent grant and the lead researcher for the grant project. If you are submitting a grant proposal as the project “owner”, you are the PI.

PI is a term used by External Awards. Liberty’s Internal Awards department mirrors the processes of External Awards.

The **Proposals Dashboard** shows the various stages a proposal goes through in the application process:



- **In Development:** This is the drafting stage of the proposal, where the PI is planning, writing, and revising the various pieces of the proposal. When complete, the PI clicks “Route for Review”, which automatically moves the proposal to an internal review round.
- **Under Review:** Proposal is routed to Dean for review. Upon approval, the proposal will route to OSPR for approval, as well as Vice Provost and Provost when applicable to proposal type. If the proposal is sent back to development, any comments are recorded in the “History” proposal section.
- **Approved:** The proposal is approved, and OSPR creates the Award. Finance funds the award. The PI is notified about the Award budget code.
  - Submitted to Sponsor: NA for Internal Awards
  - Under Consideration: NA for Internal Awards
  - Funded: NA for Internal Awards
- **Closed:** The proposal is marked as closed. This could signal the awarded project is complete, was rejected by an approver, or was withdrawn by the PI.

## Submitting a Proposal in Cayuse

1. Click "Products → Sponsored Projects". Don't see Sponsored Projects? Click [Cayuse Access Request](#).

My Tasks

Search by Task ID, Task, Created by, or Assigned to

Quick Filters: Assigned to Me

Task ID, Task, Type, Created by, Assigned to

42 Funded: Proposals were accepted by the sponsor

Products | Emily Stevens

Products | Sponsored Projects | Grants | Admin

**NOTE: Please do not create a New Task on the Task Page.**

2. Click "+ Start New Proposal"

Proposals Dashboard

+ Start New Proposal

- 10 In Development: Proposals are being filled out by researchers
- 1 Under Review: Proposals are being internal reviewed
- 6 Approved: Proposals are approved for submission
- 0 Submitted to Sponsor: Proposals were submitted to sponsor
- 0 Under Consideration: Sponsors have contacted your institution with interest
- 3 Funded: Proposals were accepted by the sponsor
- 0 Closed: Proposals were closed by an admin for some other reason

- 2a. If your new proposal is not related to a previously submitted proposal, then you will choose the first option:

Create New Proposal

- This proposal is not related to any existing proposals or awards (Create New Project)
- This proposal is related to existing proposals (Add Proposal to Project)

- 2b. Title the Project

Create New Proposal

- This proposal is not related to any existing proposals or awards (Create New Project)

Enter a title for your project:

Test for Training Guide

- This proposal is related to existing proposals (Add Proposal to Project)

Cancel Create New Project

3. Answer the questions from each of the sections:

Proposal Sections	Welcome Page
Welcome Page <span>✓</span>	<h2>Office of Sponsored Programs and Research - Funding Request Form</h2> <p>Welcome to the online submission platform for Internal and External Grants at Liberty University!</p> <ul style="list-style-type: none"><li>For additional information, please visit the Office of Sponsored Programs and Research <a href="#">website</a>.</li><li>For questions about internal submissions, <a href="mailto:grants@liberty.edu">grants@liberty.edu</a></li><li>For questions about external submissions, <a href="mailto:preaward@liberty.edu">preaward@liberty.edu</a></li></ul> <div style="border: 1px solid #0070C0; padding: 5px; background-color: #E6F2FF;"><p><span>ⓘ</span> Please answer the following question before proceeding to other sections of the proposal form:</p></div> <p>Are you applying for internal or external funding?*</p> <p><input checked="" type="radio"/> Internal <input type="radio"/> External</p> <p>I acknowledge that in order to be considered for internal funding, my submission must be made at least 2 months prior to the activity start date.*</p> <p><input checked="" type="radio"/> Yes <input type="radio"/> No</p>
General Information - Internal <span>10</span>	
Key Personnel <span>3</span>	
Internal Budget <span>5</span>	
Regulatory Compliance <span>3</span>	
Additional Information <span>!</span>	
Form Objects Practice <span>!</span>	

### General Information - Internal

**Proposal Title:\***  
Research

**Department:\***  **Sponsor: ⓘ\***

\*\*Please select/type "Liberty University The Graduate School\*\*

**Project Start Date:\***  **Project End Date:\***  **Funding/Instrument Type:\***

\*\*Please select "Internal Award\*\*

**What is the purpose of this funding request?\***

**What is the name of the event (if applicable)?**  **When is the event (if applicable)?**

**What is the location of the event (if applicable)?**  **Will this proposal involve student travel?\***  
 Yes  
 No

**Brief Proposal Description (250 characters or less).\***

**Impact of proposal on Liberty University (250 characters or less).\***

How does this proposal advance the mission, vision, and reputation of LU?

**What is the practical application of this proposal? (400 characters or less).\***

How does this advance your academic field and your professional development?

4. Please note this “Student Travel Information” tab will only generate if you are a faculty member who will be traveling with students as indicated in the General Information tab (seen above).

## Student Travel Information

How many undergraduate students will you be traveling with?\*

2

How many graduate students will you be traveling with?\*

0

Will both a male and female faculty member need to be present?\*

Yes

No

Liberty University Policy requires that all overnight trips where there are male and female students present, a male and female leader are required to travel with the group.

Please provide the full name and Liberty email address of the additional chaperone:\*

Emily Stevens - grants@liberty.edu

**You as the submitter will use your name, and your role will be “Principal Investigator” (PI).**

*This term “PI” is taken from External Awards as this is the common language used in Grants.*

## Identification of Key Personnel

Please list the Principal Investigator first, then additional key personnel.

**View Effort**

Percentage

Months

Name *	Role *
Emily Stevens	Principal Investigator

Internal Association *	Sponsored Effort			Cost Share Effort			Total Effort
	C	A	S	C	A	S	
Liberty University	%	%	%	%	%	%	-- %

Please use the “Helpful Terms Guide” to learn more about “Principal Investigator”.

## Summary Budget

This is just an example. You will need to ask your department admin/budget manager what this is for you.

Funding Tier ⓘ \*

Tier 1 - Less than \$3,500 x | v

Please provide your department's index code:\*

1H1015

Ex: 1B0000

Total Project Cost:\*

2,500

To facilitate the review process, please use one of OSPR's budget templates. Templates are available on the OSPR website:

- [General Project Budget Template](#)
- [Travel/Conference Budget Template](#)

Upload a detailed proposal budget:\*

Drag and drop new files or click to  
↓ Travel Budget Templat... ×  
106KB

Please ensure all required documents are uploaded. We will not review without all required documents.

## Account Codes

Please select all account codes that apply to this award request:

722002 - Travel - Professional Development

721002 - Professional Membership(s)

721001 - Conference Fee(s)

What amount of the budget is associated with 722002?

2500

721003 - Certification(s)/Other Conference Costs

721004 - Professional Resource Materials

611010 - Employee Professional Fees

791008 - Equipment

712003 - Food Services

711006 - Honorariums

731001 - Instructional Supplies

711099 - Other Professional Fees

732099 - Other Supplies

714002 - Printing - Promotional Materials

712005 - Printing - Non-advertising

711007 - Professional Health Services

722001 - Travel - Business/General

722005 - Travel - Host

722004 - Travel - Team

613002 - Work Assistance

613001 - Work Study

Other/Not Listed

## Reconciling Internal Awards

If faculty or students receive an award, the [reconciliation process](#) must be followed.

I acknowledge that should an award be made, the above-linked reconciliation process will be followed.\*

Yes

No



Additional Information

### Proposal Attachments

Attach any additional supporting documents (10 MB limit each)

### OSPR - Additional Information

Preaward Tracking # (OSPR Use Only)

Attributes (OSPR use only)

▼

### Submission Notes

Enter any additional comments on this proposal:

Click "Route for Review"

- Proposals
- Projects
- Awards
- Reporting ▼
- More ▼

[My Active Projects](#) / [Internal Award Test 5/3B](#) / 24-0033-P0001

## Internal Award Test 5/3B

My Actions	Proposal Summary	Approved
<div style="text-align: center;"><p>Complete Review</p><p><span style="border: 2px solid red; border-radius: 50%; padding: 2px;">Route for Review</span></p></div>	<p>PI: Connor Bryant      Sponsor: Liberty University The Gr...      Project Start Da... 5/6/2024</p> <p>Admin Unit: Graduate School ...      Prime Sponsor: --      Project End Date: 5/17/2024</p> <p>Sponsor Deadline: --      Instrument Type: Internal Award</p> <p>Total Sponsor Costs: --</p>	<p>Project: <a href="#">24-0033</a></p>

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

**Congratulations!**

You have submitted your proposal within Cayuse.

Your proposal will route to your school Dean to review.

Should you have any questions, you may consult your [Cayuse Dashboard](#) at any time or reach out to [Grants@liberty.edu](mailto:Grants@liberty.edu).

## How to Review/Approve:

Go to your [Cayuse Dashboard](#).

See below where you can click “Assigned to Me” and “Open” to indicate what is in your Review Queue.

**My Tasks** + New Task

Assigned to Me Created by Me **Open** All

Task	Task Type	From	Assigned To	Created	Last Activity	Due	Status
Review Proposal for OSPR - Internal Review - 24-0038-P0001	Other			05/30/2024	06/19/2024		Open

10 per page Showing 1 of 1 items

Click on the Proposal you wish to Review.

Test Submission 5/30/2024

**My Actions** Under Review

**Complete Review**  
Route for Review

**Proposal Summary**

PI: Alyssa Squiers Sponsor: Liberty University The... Project Start D... 7/1/2024  
Admin Unit: Sponsored Programs... Prime Sponsor: -- Project End Da... 8/1/2024  
Sponsor Deadline: -- Instrument Ty... Internal Award  
Total Sponsor Costs: --

Project: [24-0038](#)

Proposal Form Routing History Access Tasks Notes Attachments Links Admin Only

Edit Save

**Proposal Sections**

- Welcome Page ✔
- General Information - Internal !
- Key Personnel !

Office of Sponsored Programs and Research - Funding Request Form

Welcome to the online submission platform for Internal and External Grants at Liberty University!

Select and Review Each Proposal Section. A green check mark will indicate system review completion.

**Proposal Sections**

- Welcome Page ✔
- General Information - Internal !
- Key Personnel !
- Student Information !
- Internal Budget !
- Regulatory Compliance !
- Terms & Conditions !
- Additional Information !

Once you have reviewed all Proposal Sections, your check marks should be green as below:

Proposal Sections	Additional Information
Welcome Page	✓
General Information - Internal	✓
Key Personnel	✓
Student Information	✓
Internal Budget	✓
Regulatory Compliance	✓
Terms & Conditions	✓
Additional Information	✓

Proposal Attachments

Attach any additional support documents

OSPR - Additional Information

Preaward Tracking # (OSPR)

You can then click “**Complete Review**” under “**My Actions**”.

Test Submission 5/30/2024

My Actions

Complete Review

Route for Review

Proposal Summary

PI: Alyssa Squiers

Sponsor: Liberty University The...

Project Start Date: 7/1/2024

Admin Unit: Sponsored Programs ...

Prime Sponsor: --

Project End Date: 8/1/2024

Sponsor Deadline: --

Instrument Type: Internal Award

Total Sponsor Costs: --

Under Review

In Development

Under Review

Approved

Submitted to Sponsor

Under Consideration

Funded

Closed

Proposal Form

Routing

History

Access

Tasks

Notes

Attachments

Links

Admin Only

## Congratulations!

You have approved a proposal within Cayuse.

Your proposal will route to OSPR for review.

Should you have any questions, you may consult your [Cayuse Dashboard](#) at any time or reach out to [Grants@liberty.edu](mailto:Grants@liberty.edu).

