

Cayuse424

INSTRUCTIONAL GUIDE – SETTING UP PROFILES

Prepared by
Pre-Award Staff, Office of Sponsored Programs (OSP)
The University of Texas Health Science Center at San Antonio

Cayuse424, or simply Cayuse, is the software used for submitting federal grant proposals via grants.gov. Cayuse replaces the use of Adobe-based application form packages as well as NIH's online ASSIST system.

Cayuse Resources

Access to the Cayuse instructions, FAQs, Cayuse Training Environment, and much more can be found on OSP's website at <http://research.uthscsa.edu/osp/Cayuse/cayuse.shtml>.

Cayuse's own resources are also available at <http://support.cayuse.com/docs/cayuse-424>.

Browser Selection

It is strongly recommended to use only the Internet Explorer or Firefox browsers to access Cayuse. Other popular browsers, including Chrome and Safari, are only provisionally compatible and may not deliver desirable results within Cayuse.

Cayuse utilizes pop-up windows for a number of built-in features and functions. Therefore, the browser must be configured to allow pop-ups from the Cayuse site. If needed, configuration instructions can be found at <http://support.cayuse.com/docs/browser-support-configuration>.

Accessing Cayuse

Cayuse can be accessed through the following link: <https://uthscsa.cayuse424.com/>.

Cayuse utilizes the university's single sign-on (SSO) system called Shibboleth. This means that users will always enter their normal UTHSCSA username and password to access Cayuse. Likewise, anyone with a UTHSCSA username automatically has access to Cayuse – manual account creation is not necessary.

PROFILES

First Time Logins

When logging in for the first time, you must first set up your individual PROFILE, and establish permissions within the profile. This will impact your ability to complete other functions within Cayuse, so skipping this step will result in problems later on.

This step is necessary for any UTHSCSA PI that will submit a proposal through Cayuse, support staff that will access or prepare proposals on behalf of a PI, and any/all other UTHSCSA faculty or staff that will be named personnel on a proposal.

DO NOT manually create profiles for other UTHSCSA personnel under any circumstances. If you need to list another UTHSCSA employee on a proposal and they do not have an existing Cayuse profile, you must contact that individual and ask that they log in to Cayuse to complete their own profile, and then grant you access to their profile. OSP recommends sending a link to this instructional document when requesting profile creation (<http://research.uthscsa.edu/osp/Cayuse/Profiles.pdf>).

To set up your profile

Click the People tab:

Overview Opportunities Proposals Routing **People** Institutions Reports Settings Jennifer Aniston (AnistonJ) [Sign out]

People + Person

Search

@ All Institutions

[Show All](#)

Recently Viewed: 15 people

- [Aniston, Jennifer](#)
- Witherspoon, Reese
- Wayne, John
- Washington, Denzel
- Streep, Meryl
- Shields, Brooke
- Redford, Robert
- Moore, Demi
- Martin, Steve
- Kidman, Nicole
- Doo, Scooby
- Cruise, Tom
- Connery, Sean
- Clooney, George
- Claus, Santa

Locate your name in the list, or use the SEARCH feature. Your own name should appear as a hyperlink, indicating that you can click to view and edit your profile.

If you do not find your name, you may create a new profile FOR YOURSELF ONLY. You will also need to notify your OSP reviewer if you do this, as OSP will need to manually configure your profile correctly.

Within your profile, you will see a list of pages on the left side of the screen:

Overview Opportunities Proposals Routing **People** Institutions Reports Settings Jennifer Aniston (AnistonJ) [Sign out]

People > Aniston, Jennifer Permissions

Professional Profile: **Aniston, Jennifer**

General Personal Information

- Name
- Degrees
- Demographics
- Biosketches

1 Institutional Association

- UNIVERSITY OF TEXAS HLTH SCI... (Friendship Studies)

Contact Info

eRA Role

Dept / Division / Title

Salary and Fringe Worksheet

Performance Site

Routing Profile

Name Rename

Prefix:

First: Jennifer

Middle:

Last: Aniston

Suffix:

NIH Commons ID:

NASA NSPIRES ID:

Click through each page, adding information as needed:

1. Name: ensure your name appears exactly as you would like it to appear on proposals.

Overview Opportunities Proposals Routing **People** Institutions Reports Settings Jennifer Aniston (AnistonJ) [Sign out]

People > Aniston, Jennifer Permissions

Professional Profile: **Aniston, Jennifer**

General Personal Information

- Name ▶
- Degrees
- Demographics
- Biosketches

1 Institutional Association +

- UNIVERSITY OF TEXAS HLTH SCI... (Friendship Studies)**

- Contact Info
- eRA Role
- Dept / Division / Title
- Salary and Fringe Worksheet
- Performance Site

Routing Profile

Name Rename

Prefix:

First: Jennifer

Middle:

Last: Aniston

Suffix:

NIH Commons ID:

NASA NSPIRES ID:

2. Degrees: enter your degree details in different formats commonly used by federal agencies.

Overview Opportunities Proposals Routing **People** Institutions Reports Settings Jennifer Aniston (AnistonJ) [Sign out]

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Professional Profile: **Aniston, Jennifer**

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- Degrees ▶
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1 Institutional Association +

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Routing Profile

Degrees ?

NIH Degrees (comma separated, max of 3):

Senior/Key Person Degree Type:

Senior/Key Person Degree Year:

NSF Degree Type:

NSF Degree Year:

3. Demographics: optional; enter information here only if desired.

Overview Opportunities Proposals Routing **People** Institutions Reports Settings **Jennifer Aniston (AnistonJ)** [Sign out]

People > Aniston, Jennifer  Permissions

Professional Profile: **Aniston, Jennifer** 

General Personal Information

[Name](#)
[Degrees](#)
[Demographics](#) ▶
[Biosketches](#)

1 Institutional Association 

 **UNIVERSITY OF TEXAS HLTH SCI... (Friendship Studies)**

[Contact Info](#)
[eRA Role](#)
[Dept / Division / Title](#)
[Salary and Fringe Worksheet](#)
[Performance Site](#)

 Routing Profile

Demographics

Gender: Female ▼

Race (Check all that apply):

- American Indian or Alaska Native
- Asian
- Black or African American
- Native Hawaiian or Other Pacific Islander
- White
- Do Not Wish to Provide

Ethnicity: Do Not Wish To Provide ▼

Citizenship: US Citizen ▼

Disability Status (Check all that apply):

- Hearing
- Visual
- Mobility/Orthopedic Impairment
- Other
- None
- Do Not Wish to Provide

4. Biosketches: optional; you can upload a biosketch here for ease of insertion into proposals. As biosketches are commonly revised according to each different proposal, this feature is seldom used.

Overview Opportunities Proposals Routing **People** Institutions Reports Settings **Jennifer Aniston (AnistonJ)** [Sign out]

People > Aniston, Jennifer  Permissions

Professional Profile: **Aniston, Jennifer** 

General Personal Information

[Name](#)
[Degrees](#)
[Demographics](#)
[Biosketches](#) ▶

1 Institutional Association 

 **UNIVERSITY OF TEXAS HLTH SCI... (Friendship Studies)**

[Contact Info](#)
[eRA Role](#)
[Dept / Division / Title](#)
[Salary and Fringe Worksheet](#)
[Performance Site](#)

 Routing Profile

Biosketches 

Currently no Biosketches are filed in Cayuse424 for "Aniston, Jennifer".

5. It is not necessary to click on the institution name – this will only take you to view the institutional profile. Skip to:

6. Contact Info: some basic information is pre-populated from employee record; fill in and edit as needed.

The screenshot shows the 'Contact Info' form for Jennifer Aniston. The form is titled 'UNIVERSITY OF TEXAS HLTH SCI CTR SAN ANTONIO (Friendship Studies) Contact Info'. It contains the following fields:

- Street 1: 7703 Floyd Curl Drive, MC 0000
- Street 2: (empty)
- City: San Antonio
- State/Province: Texas (dropdown menu)
- Zip/Postal Code: 78229-3900
- County: Bexar
- Country: United States of America (dropdown menu)
- Phone: 210-567-0000
- Fax: 210-567-9999
- Email: anistonj@uthscsa.edu

On the left side of the form, there is a sidebar with 'General Personal Information' and '1 Institutional Association'. The 'Institutional Association' section shows 'UNIVERSITY OF TEXAS HLTH SCI... (Friendship Studies)' with a red 'X' icon. Below this, there are links for 'Contact Info', 'eRA Role', 'Dept / Division / Title', 'Salary and Fringe Worksheet', and 'Performance Site'. A 'Routing Profile' button is also present.

7. eRA Role: all individuals with the possibility of ever being a PI on a grant should check the “PI” role. Administrative support staff should select the role of “Assistant”.

The screenshot shows the 'eRA Role' form for Jennifer Aniston. The form is titled 'UNIVERSITY OF TEXAS HLTH SCI CTR SAN ANTONIO (Friendship Studies) eRA Role'. It contains the following fields:

- Role(s):
 - Principal Investigator
 - Assistant
 - Administrative Official
 - Signing Official / "AOR"
 - Payee

On the left side of the form, there is a sidebar with 'General Personal Information' and '1 Institutional Association'. The 'Institutional Association' section shows 'UNIVERSITY OF TEXAS HLTH SCI... (Friendship Studies)' with a red 'X' icon. Below this, there are links for 'Contact Info', 'eRA Role', 'Dept / Division / Title', 'Salary and Fringe Worksheet', and 'Performance Site'. A 'Routing Profile' button is also present.

8. Dept/Division/Title: some basic information is pre-populated from employee records; fill in and edit as needed. NOTE: Division is the school in which your department falls (e.g. School of Medicine, School of Nursing, etc.).

Overview Opportunities Proposals Routing **People** Institutions Reports Settings Jennifer Aniston (AnistonJ) [Sign out]

People > Aniston, Jennifer Permissions

Professional Profile: **Aniston, Jennifer**

General Personal Information

[Name](#)

[Degrees](#)

[Demographics](#)

[Biosketches](#)

1 Institutional Association +

✗ UNIVERSITY OF TEXAS HLTH SCI... (Friendship Studies)

[Contact Info](#)

[eRA Role](#)

[Dept / Division / Title](#) ▶

[Salary and Fringe Worksheet](#)

[Performance Site](#)

⚙️ Routing Profile

UNIVERSITY OF TEXAS HLTH SCI CTR SAN ANTONIO (Friendship Studies)

Department / Division / Title

	Code	Title
Department:	<input type="text"/>	<input type="text" value="Friendship Studies"/>
Division:	<input type="text"/>	<input type="text" value="School of Medicine"/>
Position/title:	<input type="text" value="Associate Professor"/>	

NASA

Is this appointment an employee of the U.S. Government?

No ▼

If yes, select U.S. Government agency:

Is this appointment an employee of a foreign organization?

No ▼

9. Salary and Fringe Worksheet: at minimum, enter the calendar month appointment type (most employees will enter 12; part-time or joint-appointed personnel will be different). Leave academic and summer month boxes blank as UTHSCSA uses only calendar month appointments. Select the fringe rate that should be applied (i.e. 26% faculty, 30% staff, 10% students). Salary can be optionally entered; it is not necessary to enter a salary amount.

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1 Institutional Association +

✗ UNIVERSITY OF TEXAS HLTH SCI... (Friendship Studies)

[Contact Info](#)

[eRA Role](#)

[Dept / Division / Title](#)

[Salary and Fringe Worksheet](#) ▶

[Performance Site](#)

⚙️ Routing Profile

UNIVERSITY OF TEXAS HLTH SCI CTR SAN ANTONIO (Friendship Studies)

Salary / Appointment type

Employee ID:

Appt Type:

Months Salary

Calendar:

Academic:

Summer:

Fringe Worksheet

✎ Import Institutional Rates

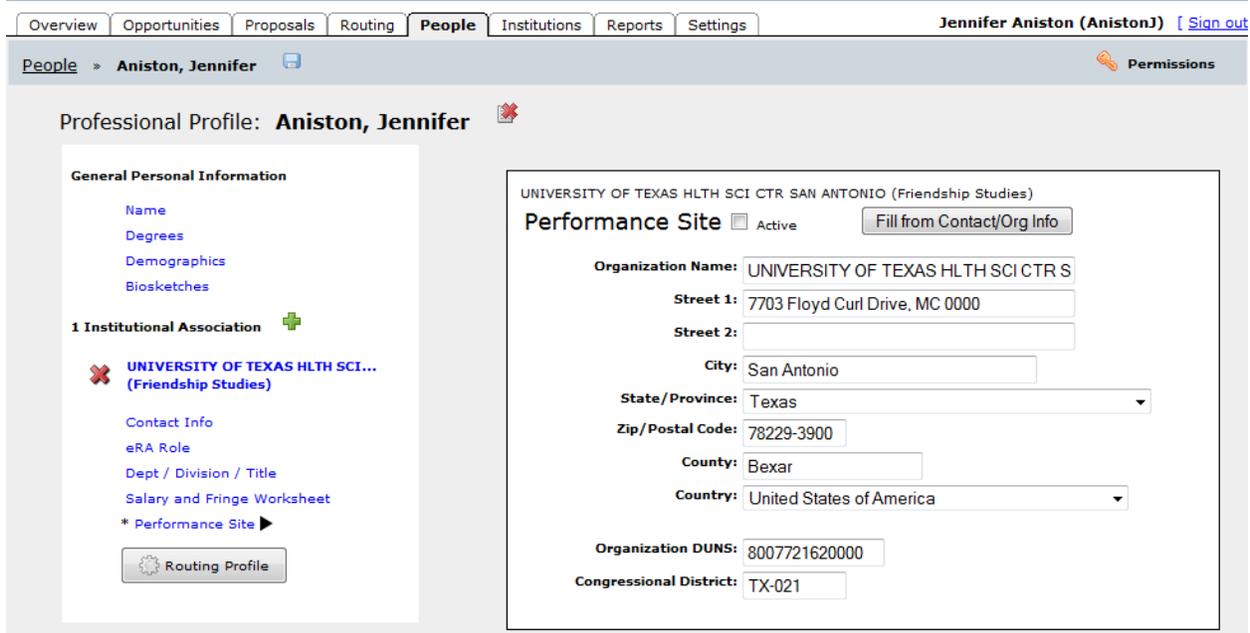
	Category	Entry (\$)	Factor (%)
i	Faculty ▼		26.0 ✗

+ New Row

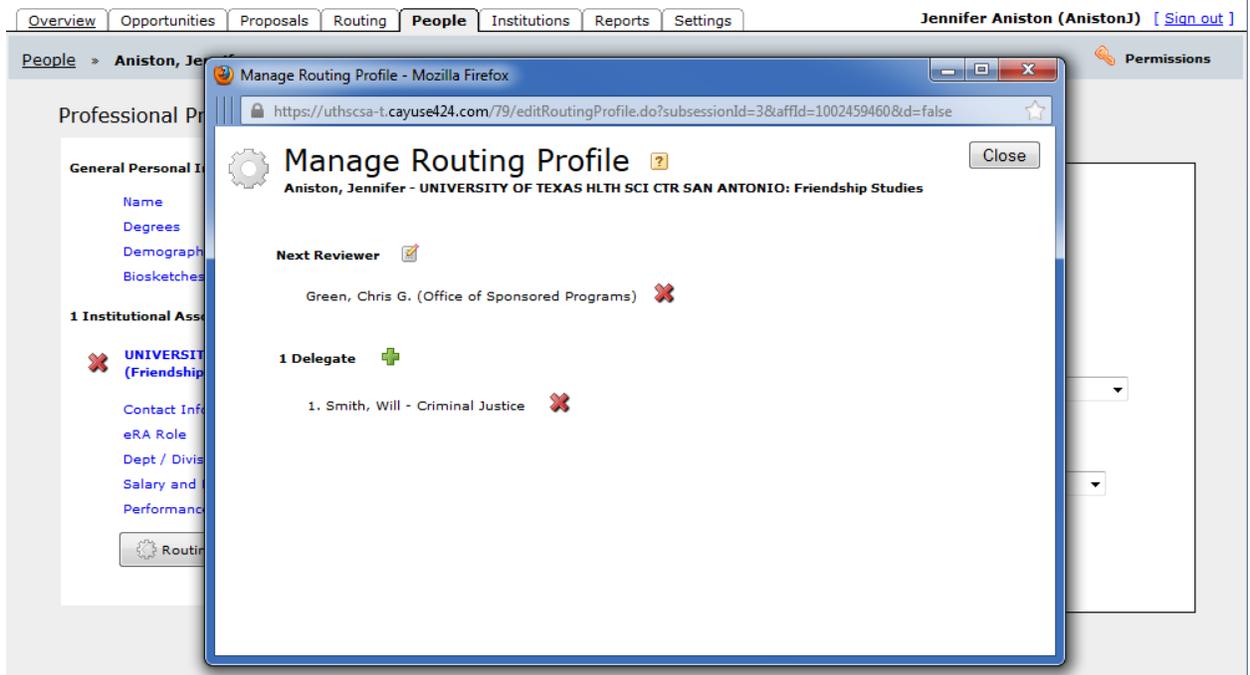
Base Fringe Rate: %

Fringe Rate Total:

10. Performance Site: optional; you can fill this in if you would like to populate your proposal's performance site information from your profile. This information can also be added to your proposal from Institution Profiles, or manual data entry.



11. Routing Profile: optional, and generally applicable only to Principal Investigators. This is covered in more detail in the full Cayuse Instruction Guide (<http://research.uthscsa.edu/osp/Cayuse/Handout.pdf>).



Profile Permissions

This is how you can give access to your profile to other users. Your own name should appear with all permissions checked.

You can give varying levels of access to your profile to other UTHSCSA personnel:

Permissions for Professional Profile: **Aniston, Jennifer**

[Add user](#)

	List	Read	Write	Autofill	Delete	Change Permissions	Add User	Remove User
Aniston, Jennifer (AnistonJ)	<input checked="" type="checkbox"/>							
Smith, Will (smithw)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Witherspoon, Reese (WitherspoonR)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Clooney, George (clooney)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Add Security Principal - Mozilla Firefox

https://uthscsa-t.cayuse424.com/79/showPrincipalsList.do?searchValue=wayne&

Add Security Principal [close](#)

wayne

[Show Recently Used](#) | [Show All](#)

Select Users below to provide access to this Professional Profile.

Search Results: 1 principal match

Type	User	Profile Name
U	WayneJ	Wayne, John

By default, the system will give LIST, READ, and AUTOFILL permissions; this can be adjusted as needed. These are the minimum permissions needed for someone to name you as project personnel on a proposal. If the individual will need to edit your profile, add further access as needed. For a description of each level of access, hover the mouse over the column heading:

Permissions for Professional Profile: **Aniston, Jennifer**

[Add user](#)

	List	Read	Write	Autofill	Delete	Change Permissions	Add User	Remove User
Aniston, Jennifer (AnistonJ)	<input checked="" type="checkbox"/>							
Smith, Will (smithw)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Witherspoon, Reese (WitherspoonR)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Clooney, George (clooney)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Wayne, John (WayneJ)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Write Permission
Controls permission to Write this Professional Profile.