

# Starting a Proposal

1

Tasks

Create New

Search for Task by ID, Title, Milestone ID, Assigned to or Created by

Search for Task by ID, Title, Milestone ID, Assigned to or Created by

Set View

ID	Title	Type	Milestone ID	Category	Progress	Assigned to
<a href="#">26-02-0016</a>	Approve Subaward	SP Ad Hoc Task				Irene Investigator morgan.chapman+investigator@ca School of Professional Nursing
<a href="#">26-02-0017</a>	Export Control Tab	SP Ad Hoc Task				Irene Investigator morgan.chapman+investigator@ca School of Professional Nursing
<a href="#">26-02-0020</a>	Need Documents	SP Ad Hoc Task		Subaward Setup		Irene Investigator morgan.chapman+investigator@ca School of Professional Nursing
<a href="#">26-03-0003</a>	COI Research-based Disclosure Action Needed	COI Disclosure				Irene Investigator morgan.chapman+investigator@ca School of Professional Nursing
<a href="#">26-02-0040</a>	Example	SP Ad Hoc Task				Irene Investigator morgan.chapman+investigator@ca School of Professional Nursing
<a href="#">26-02-0035</a>	Testing Example 11.3.25	SP Ad Hoc Task		Budget Specialist Review		Irene Investigator morgan.chapman+investigator@ca School of Professional Nursing

RESTORE DEFAULTS

ALL FILTERS

Assigned to Me

Assigned to a Team

Created by Me

JS

Open

Progress

On Hold

Completed

RECENT DUE DATE

30 Days

Next Due

CATEGORY

Search Category

Select All

2

Click Products.

The screenshot shows the Cayuse Investigator web application. The top navigation bar includes a 'Products' dropdown menu, which is highlighted with an orange circle. The user is logged in as 'Irene Investigator'. Below the navigation bar, there is a search bar and a table of tasks. The table has columns for ID, Title, Type, Milestone ID, Category, Progress, and Assigned to. The tasks listed are:

ID	Title	Type	Milestone ID	Category	Progress	Assigned to
<a href="#">26-02-0016</a>	Approve Subaward	SP Ad Hoc Task	--	--	--	Irene Investigator morgan.chapman+investigator@cayuse School of Professional Nursing
<a href="#">26-02-0017</a>	Export Control Tab	SP Ad Hoc Task	--	--	--	Irene Investigator morgan.chapman+investigator@cayuse School of Professional Nursing
<a href="#">26-02-0020</a>	Need Documents	SP Ad Hoc Task	--	Subaward Setup	--	Irene Investigator morgan.chapman+investigator@cayuse School of Professional Nursing
<a href="#">26-03-0003</a>	COI Research-based Disclosure Action Needed	COI Disclosure	--	--	--	Irene Investigator morgan.chapman+investigator@cayuse School of Professional Nursing
<a href="#">26-02-0040</a>	Example	SP Ad Hoc Task	--	--	--	Irene Investigator morgan.chapman+investigator@cayuse School of Professional Nursing

3

Click Sponsored Projects.

The screenshot shows the Cayuse Investigator web application. The top navigation bar includes a 'Products' dropdown menu, which is highlighted with an orange circle. The user is logged in as 'Irene Investigator'. Below the navigation bar, there is a search bar and a table of tasks. The tasks listed are:

ID	Title	Type	Milestone ID	Category	Progress	Assigned to
<a href="#">26-02-0016</a>	Approve Subaward	SP Ad Hoc Task	--	--	--	Irene Investigator morgan.chapman+investigator@cayuse School of Professional Nursing
<a href="#">26-02-0017</a>	Export Control Tab	SP Ad Hoc Task	--	--	--	Irene Investigator morgan.chapman+investigator@cayuse School of Professional Nursing
<a href="#">26-02-0020</a>	Need Documents	SP Ad Hoc Task	--	Subaward Setup	--	Irene Investigator morgan.chapman+investigator@cayuse School of Professional Nursing
<a href="#">26-03-0003</a>	COI Research-based Disclosure Action Needed	COI Disclosure	--	--	--	Irene Investigator morgan.chapman+investigator@cayuse School of Professional Nursing
<a href="#">26-02-0040</a>	Example	SP Ad Hoc Task	--	--	--	Irene Investigator morgan.chapman+investigator@cayuse School of Professional Nursing

4

Click "Start New Proposal"

The screenshot shows the 'Irene Investigator' dashboard. At the top, there's a navigation bar with 'Products' and 'Irene Investigator'. Below it, a menu bar includes 'Projects', 'Awards', 'Subawards', and 'Reporting'. The main heading is 'Dashboard'. On the right side of the dashboard, there's a blue button labeled '+ Start New Proposal' which is circled in orange. Below the dashboard heading, there are five summary cards: '6 Under Review' (Proposals are being internal reviewed), '1 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), and '1 Closed' (Proposals were closed by an admin for some other reason). Below these cards is a table of proposals. The table has columns: Proposal #, PI, Status, Sponsor, Prime Sponsor, Admin Unit, Project Start Date, Project End Date, Proposal Type, and Instrument Type. The table contains four rows of data. The first row is for proposal 26-0115-P0001, PI Irene Investigator, Status In Development, Sponsor U.S. Department of Defense, Prime Sponsor --, Admin Unit Institutional Research Office, Project Start Date 1/1/2026, Project End Date 12/31/2027, Proposal Type New, and Instrument Type --. The second row is for proposal 26-0114-P0001, PI Irene Investigator, Status Closed, Sponsor National Cancer Institute, Prime Sponsor National Institutes of Health, Admin Unit College of Arts & Sciences, Project Start Date 12/1/2025, Project End Date 11/30/2028, Proposal Type New, and Instrument Type --. The third row is for proposal 26-0099-P0001, PI --, Status In Development, Sponsor --, Prime Sponsor --, Admin Unit --, Project Start Date --, Project End Date --, Proposal Type --, and Instrument Type --. The fourth row is for proposal 26-0097-P0001, PI Irene Investigator, Status Approved, Sponsor --, Prime Sponsor --, Admin Unit --, Project Start Date --, Project End Date --, Proposal Type --, and Instrument Type --. At the bottom right of the table, there's a red circle with the number 2.

Proposal #	PI	Status	Sponsor	Prime Sponsor	Admin Unit	Project Start Date	Project End Date	Proposal Type	Instrument Type
<a href="#">26-0115-P0001</a>	Irene Investigator	In Development	U.S. Department of Defense	--	Institutional Research Office	1/1/2026	12/31/2027	New	--
<a href="#">26-0114-P0001</a>	Irene Investigator	Closed	National Cancer Institute	National Institutes of Health	College of Arts & Sciences	12/1/2025	11/30/2028	New	--
<a href="#">26-0099-P0001</a>	--	In Development	--	--	--	--	--	--	--
<a href="#">26-0097-P0001</a>	Irene Investigator	Approved	--	--	--	--	--	--	--

5

Click "This proposal is not related to any existing proposals or awards (Create New Project)" if there is not an existing project related to this proposal.

Click "This proposal is related to existing proposals or awards (Add Proposal to Project)" if there is an existing project that directly relates to this proposal. Cayuse will group all proposals and awards by the project number.

For this example, we will create a proposal that is not related to another record in Cayuse.

**Proposals Dashboard**

12 In Development  
Proposals are being filled out by researchers

6 Under Review  
Proposals are being internal reviewed

1 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

1 Funded  
Proposals were accepted by the sponsor

1 Closed  
Proposals were closed by an admin for some other reason

**Create New Proposal**

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

☐ This proposal is related to existing proposals or awards (Add Proposal to Project)

Project Title	Proposal #	PI	Status	Department	Institution	Start Date	End Date	Proposal Type
Overview Sample 2	26-0115-P0001	Irene Investigator	In Development	U.S. Department of Defense	Institutional Research Office	1/1/2025	12/31/2027	New
Overview Sample 1	26-0114-P0001	Irene Investigator	Closed	National Cancer Institute	National Institutes of Health	12/1/2025	11/30/2028	New
Example 11.3.25 Recording	26-0099-P0001	—	In Development	—	—	—	—	—
Test	26-0097-P0001	Irene Investigator	Approved	—	—	—	—	—
Sample 10.09.2025	26-0065-P0001	Irene Investigator	In Development	—	—	—	—	—
testing	26-0051-P0001	Erica Kennedy	In Development	Mississippi State University (MSU)	Mississippi State University (MSU)	12/1/2025	11/30/2027	New

6 Click the "Enter a title for your project:" field.

**Proposals Dashboard**

12 In Development  
Proposals are being filled out by researchers

6 Under Review  
Proposals are being internal reviewed

1 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

1 Funded  
Proposals were accepted by the sponsor

1 Closed  
Proposals have been closed

**Create New Proposal**

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

Enter a title for your project:

New project title

☐ This proposal is related to existing proposals or awards (Add Proposal to Project)

Cancel Create New Project

Project Title	Proposal #	PI	Status	Institution	Start Date	End Date	Proposal Type
Overview Sample 2	26-0115-P0001	Irene Investigator	Closed	National Cancer Institute	12/1/2025	11/30/2028	New
Overview Sample 1	26-0114-P0001	Irene Investigator	Closed	National Cancer Institute	12/1/2025	11/30/2028	New
Example 11.3.25 Recording	26-0092-P0001	—	In Development	—	—	—	—
Test	26-0097-P0001	Irene Investigator	Approved	—	—	—	—
Sample 10.09.2025	26-0068-P0001	Irene Investigator	In Development	—	—	—	—
testing	26-0051-P0001	Erica Kennedy	In Development	Mississippi State University (MSU)	12/1/2025	11/30/2027	New

7 Type the title of your project.

**Proposals Dashboard**

12 In Development  
Proposals are being filled out by researchers

6 Under Review  
Proposals are being internal reviewed

1 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

1 Funded  
Proposals were accepted by the sponsor

1 Closed  
Proposals have been closed

**Create New Proposal**

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

Enter a title for your project:

Example 11.3.25

☐ This proposal is related to existing proposals or awards (Add Proposal to Project)

Cancel Create New Project

Project Title	Proposal #	PI	Status	Institution	Start Date	End Date	Proposal Type	Instrument Type
Overview Sample 2	26-0115-P0001	Irene Investigator	Closed	National Cancer Institute	12/1/2025	11/30/2028	New	—
Overview Sample 1	26-0114-P0001	Irene Investigator	Closed	National Cancer Institute	12/1/2025	11/30/2028	New	—
Example 11.3.25 Recording	26-0092-P0001	—	In Development	—	—	—	—	—
Test	26-0097-P0001	Irene Investigator	Approved	—	—	—	—	—
Sample 10.09.2025	26-0068-P0001	Irene Investigator	In Development	—	—	—	—	—
testing	26-0051-P0001	Erica Kennedy	In Development	Mississippi State University (MSU)	12/1/2025	11/30/2027	New	—
Testing 2.9.26.2025	26-0049-P0001	Irene Investigator	In Development	Florida Atlantic University	8/1/2025	8/30/2025	General Consideration	—

8 Click "Create New Project".

**Create New Proposal**

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

Enter a title for your project:

Example 11.3.25

☐ This proposal is related to existing proposals or awards (Add Proposal to Project)

Cancel Create New Project

Proposal #	PI	Status	Start Date	End Date	Proposal Type	Instrument Type
26-0115-P0001	Irene Investigator	Closed	12/1/2025	11/30/2028	New	...
26-0114-P0001	Irene Investigator	In Development	...	...	...	...
26-0099-P0001	Irene Investigator	Approved	...	...	...	...
26-0077-P0001	Irene Investigator	In Development	...	...	...	...
26-0068-P0001	Erica Kennedy	In Development	12/1/2025	11/30/2027	New	...
26-0061-P0001	Irene Investigator	In Development	9/1/2025	9/30/2025	Renewal/Competing Continuation	...

**i** While completing the proposal form, skip any field you are unsure on. Your Pre-Award Admin will work collaboratively with you to ensure the form is completed accurately.

9 You will be brought to the Proposal Form. The first tab is General Information. Begin entering all the information that you know on this page. Move through all remaining tabs under General Information to Summary Budget.

Proposal Sections	General Information
General Information	Sponsor Information
Key Personnel	<div> <div>Sponsor:</div> <div> <input type="text"/> <div>▼</div> </div> <div>Direct source of funds</div> </div>
Regulatory Compliance	<div> <div>Prime Sponsor (If applicable):</div> <div> <input type="text"/> <div>▼</div> </div> <div>Originating source of funds (if different than sponsor organization)</div> </div>
Export Control	<div> <div>If Sponsor is not listed, please specify:</div> <div> <input type="text"/> </div> </div>
Foreign Support & Collaboration	<div> <div>If Prime Sponsor is not listed, please specify:</div> <div> <input type="text"/> </div> </div>
Information Sharing	<div> <div>Sponsor Type:</div> <div> <input type="text"/> <div>▼</div> </div> </div>
Research Impact	<div> <div>Sponsor Deadline:</div> <div> <input type="text"/> </div> </div>
Project Related FCOI	<div> <div>Sponsor Program:</div> <div> <input type="text"/> </div> </div>
Performance Sites	<div> <div>Funding Opportunity/Solicitation No:</div> <div> <input type="text"/> </div> </div>
Summary Budget	<div> <div>Funding Opportunity URL:</div> <div> <input type="text"/> </div> </div>
Proposal Attachments	<div> <div>Does the sponsor place a limit on the number of proposals that can be submitted to this opportunity by an institution?</div> <div> <input type="text"/> </div> </div>
Additional Information	<div> <div>How did the Principal Investigator (PI) learn about this opportunity?</div> <div> <input type="text"/> </div> </div>

- 10 Contact your Pre-Award Admin upon completion of the proposal form. They will work with you to verify the information and begin routing. Please note that only ORA staff should initiate routing for a proposal.