cayuse

Subawards.com User Guide

Getting Started

Creating Your Institutional Profile

An Institutional Profile contains information about your institution, such as name, Fringe Rates & Benefits, Indirect Costs, and Escalation Rates. You will need to create an Institutional Profile prior to submitting a subaward proposal.

1. Click on the **Institutions** tab.
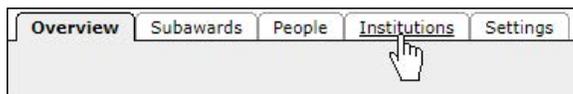
2. Click ![Institution] .

3. Enter your institution's name and click **Create New Profile**.
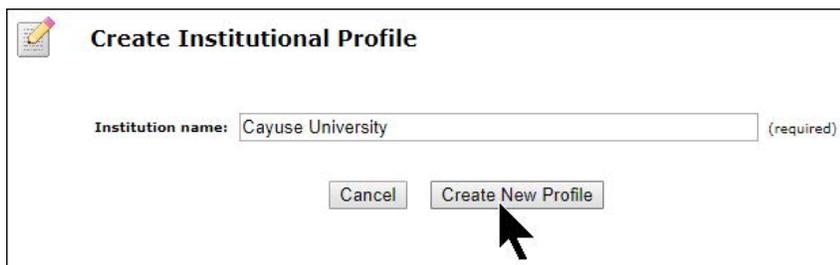
Your Institutional Profile will be created. The menu on the left-hand side of the screen will help you navigate between informational fields.

Name: Enter information such as institution name, address, and DUNS number.

Fringe Rates & Benefits: If relevant, enter your institution's base fringe rate as a percentage without the %. Additional Categories can be added with an annual amount or percentage.

Indirect Costs: Click on IDC Type 1 and enter a period start date and rate. Rates should be entered without the %. If you have an escalating rate, enter future dates and rates. Repeat as needed for all of your indirect cost types.

> **Default Indirect Cost Type for Budget Page Items:** You can use the drop-downs in the second section to select a default indirect cost type for different categories. **Selected Default Rate** will use the cost type that was selected as the default rate when the subaward proposal was created. When you create a new subaward proposal, the rates defined here will be autofilled as options for the subaward proposal budget categories.

> **Agreement Date:** If you have a negotiated rate agreement, use the calendar icon to select the agreement date. The Agreement Date is auto-populated into the Modular Budget.

Escalation Rates: Enter default escalation rates for budget categories. These can either be overridden or set at the subaward level.

Unsaved information within the profile will display with an asterisk next to the menu category. Click the disk icon next to the institution name to save the Institutional Profile.
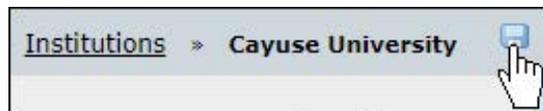
Creating Your Professional Profile

A Professional Profile contains information about each key person on your subaward proposal. You can enter common information about key people just once and reuse it in any number of proposals.

1. Click on the **People** tab.

2. Click on ![Person] .

3. Enter the person's name (first and last required), and click **Create New Profile**.

The Professional Profile will be created. The menu on the left-hand side of the screen will help you navigate between informational fields.

Fill in information regarding the individual's name, degrees, contact info, etc., and then click on the save icon.
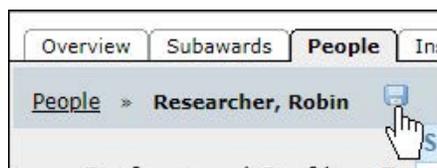
Once you save, a new category called **Fringe and Salary Worksheet** will appear.

Click on it to enter the Employee ID and Appt Type, including Months and Salary.

Fringe Benefit information is importable by clicking ![Import Institutional Rates] and selecting from the available list, or by clicking ![New Row] to enter a new fringe rate category.
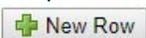
Don't forget to click on the Save icon when you are finished.

Subaward Proposal Development

Creating a Subaward Proposal

1. Click on the Subawards tab.
2. Click ![pencil icon] .

| Overview | Subawards | People | Institutions | Settings |

3. Fill in the Subaward Name, Organization, # of Budget periods, Due Date, and Validation Type, and click **Create Subaward**.
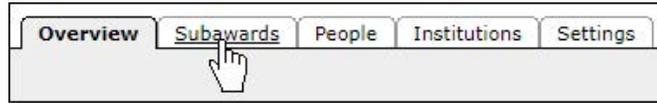
Form Fields

Fields are formatted for text, dates, or numbers.

To fill date fields, click the calendar icon or input the date manually. Dates should be entered as MM/DD/YYYY.

Some fields will accept either dollar amounts or percentages, for example, the Fringe Benefits column in the Budget pages. In the Fringe Benefits column, entering 63.5 would yield $63.50; entering 63.5% would yield a dollar amount equal to 63.5% of the Salary Requested.

Values in fields are automatically calculated as you fill in the form, and recalculated each time you enter data into a related field. A red asterisk marks fields where overwriting is permitted.

Adding Senior and Key Personnel

Please Note: Key Persons must be added beneath the **People** tab in order to be added to a subaward.

1. On page 1 of the Detailed Budget or Key Persons, click ![pencil icon] .
2. Use the search bar to type in part of an individual's name, and click **Search**. Highlight their name, and click ![Add Selected Key Person] .
3. In the new window, add Role, Appointment Type, and Budget. The fields in the subaward will automatically populate. Click ![Close] .

Viewing Errors/Warnings/Info

1. Click the **Error/Warning/Info** button at the bottom of any page.
2. A new window will display a list of Errors, Warnings, and Info.
3. Click the hyperlink for a specific error or warning to see the field where the Error or Warning persists.

| Error (40) / Warning (0) / Info (0) | FDA ▼ |

Error: [PerformanceSites 0] Street1 is mandatory

Error: [PerformanceSites 0] C... is mandatory

Error: [PerformanceSites 0] Country is mandatory

Error: [Key Person 2][FDA] The State/Province on the performance site page should be blank

Error: [Key Person 1] Phone Number must be filled in

Error: [Key Person 2] Phone Number must be filled in
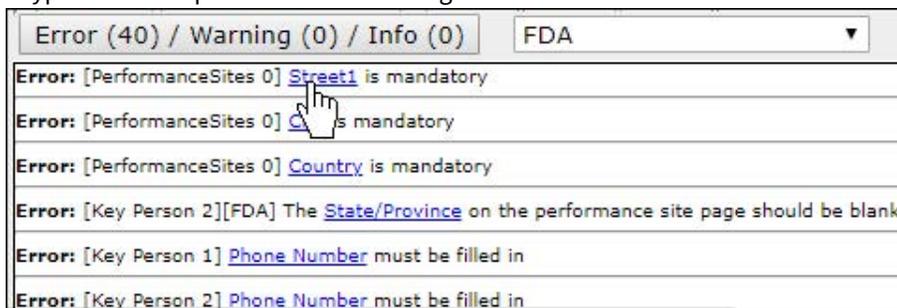
Replication and Escalation of Budget Data

1. In the top-right hand corner of any budget page, click ![icon] .
2. In the new window, Choose some or all of the budget categories by checking **Enable**. Adjust the budget period, and choose if you want to **Replicate Non-Fed data for all selected categories**, or **Pre-Escalate Budget Period 1 Salaries**.
3. Click either **Escalate Selected Categories** or **Replicate Selected Categories**.

Refreshing Institutional Profile Data

If there are data changes in your Institutional Profile after you've created your subaward proposal, you can refresh your data.

1. Click on page 1 of your Detailed Budget.

2. Click on [icon] to the right of the organization name.

3. Click **Re-autofill Applicant Organization**.

The new Institutional Profile data has now been synced with your subaward proposal.

Attaching Internal Documentation

Internal documentation, such as letters of support and letters of collaboration, can be attached to a subaward.

1. In the left-hand navigation bar, click **Supporting Documents**.

2. Click **Add** to upload attachments.

3. In the new window, click either **Choose Final** or **Choose Draft.** Select your file, and click **Upload**.
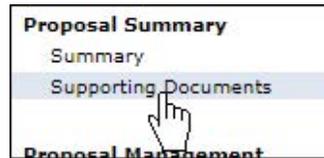
Printing Your Subaward Proposal

1. Click the **Print** icon in the upper right-hand corner of any subaward page.

2. Select the forms/attachments to be printed.

3. Click **Generate PDF**. You can now print directly from the PDF file.

Routing Your Subaward Proposal

Sending your subaward for review generates a PDF document for your reviewers.

1. Click the **Send Subaward for Review** icon in the upper right-hand corner.

2. Enter email addresses of reviewers.

3. Include additional comments, if applicable.

4. Click **Send Proposal**.
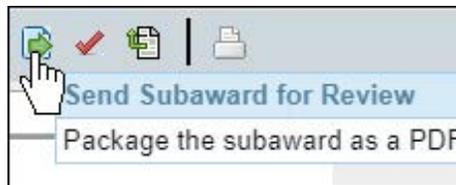
Exporting and Sending Your Subaward Proposal

Exporting your subaward creates a file type that can be imported directly into Cayuse 424.

1. Click the **Export** icon.

2. Enter a name for the exported file.

3. Click **Validate** to run final validation checks.

4. Click **Export**.

5. The subaward will be downloaded by your browser.

The file can now be attached to an email and sent to the prime applicants department administrator.

Managing Your Subaward Proposals

Deleting a Subaward Proposal

1. Click on the **Subawards** tab.
2. Click ✖ to the right of the subaward proposal you want to delete.

Copying a Subaward Proposal

1. Click on the **Subawards** tab.
2. Click to the right of the subaward proposal you want to copy.

3. Enter a new subaward name, check the **Copy Attachments** box if you want attachments to be copied, and enter a due date.

4. Click **Copy Proposal**.

The copied subaward proposal will now appear in your Subawards tab.