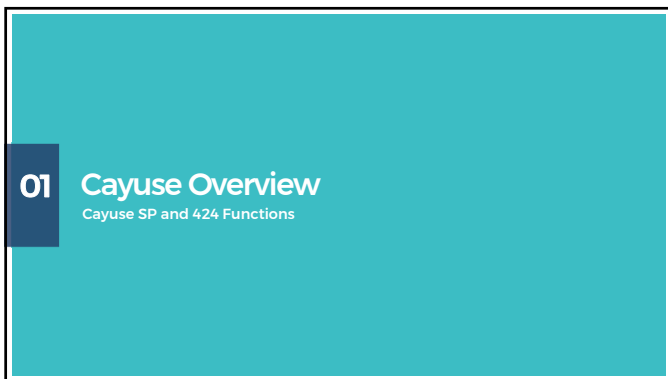




Learning Objectives			
01 Role Managers	02 Critical Roles	03 Identify Roles	04 Establish Roles
Role Managers Know the responsibilities and functions of Role Managers	Critical Roles Know the critical Research Contact Roles in Cayuse	Identify Roles Be able to identify Research Contact Role Assignments	Establish Roles Be able to establish Research Contact Roles



Cayuse



-  **Cayuse SP**
Internal routing and approval
-  **Cayuse 424**
Application submission to most Federal sponsors
-  **System Administration**
Unit Roles list and System Administration applications

Cayuse Research Suite
3.7.2

Research Administration Modules

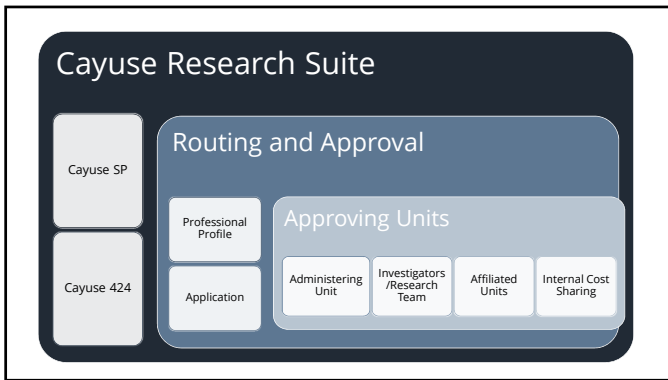
- Cayuse SP (Sponsored Projects)
- Cayuse 424

System Administration Applications

- [Business](#)
- [Research Contacts](#)
- Workflow

Application Help

- Research Suite Support Center



Cayuse Roles

- Professional Profiles**
 - Personnel, Salary and Appointment Information
- Research Contacts**
 - Administrative Permissions for Administering Units
- Investigators/Research Team**
 - IPF-Specific Access

02 Research Contact Roles

Administrative roles for administering units of proposals, awards and subawards

Role Managers

Unit Heads complete a [Role Delegation Authorization Form](#) and request establishment of Role Managers for their units.



This Photo by Unknown Author is licensed under CC BY-NC-ND

- 01 **Coordinate with Unit Head**
Accurate and appropriate role delegation
- 02 **Grant Access**
Establish Research Contact roles
- 03 **Unit Subject Matter Expert**
Provide guidance to unit investigators and staff

Critical Research Contact Roles



IPF Approver

Approves proposals/IPFs administered by their unit and/or involving investigators from their unit

The Unit Head or their delegate



Pre-Award Spending Approver

Endorses Advance Accounts requests for proposals submitted through their unit (as administering unit)

The Unit head or their delegate



Role Manager

Establishes Research Contact roles for their administering unit

Usually contract and grant administrators and other staff roles

Other Research Contact Roles

01 **Proposal Data Access**
May view proposal/IPF details in an administering unit

02 **Award Data Access**
May view award details in an administering unit



Activity 1: Who Can Help?

Read the scenario and select the Research Contact Role(s) that can provide assistance.



1. A PI would like to know the status of their proposal that a department admin submitted on their behalf in Cayuse SP. The department admin is out of the office. What Research Contact Role allow the needed access to check the status of the proposal/IPF?
 - A. Role Manager
 - B. Proposal Data Access
 - C. Award Data Access

Activity 1: Who Can Help?

Read the scenarios and select the Research Contact Role(s) that can provide assistance.



2. A PI would like to know the status of an award they received from NIH and that was submitted to SPO via email. What Research Contact Roles allow the needed access to check the status of the award?
 - A. Role Manager
 - B. Proposal Data Access
 - C. Award Data Access

Activity 1: Who Can Help?

Read the scenario and select the Research Contact Role(s) that can provide assistance.



- 3. A new person is hired as a contract and grant admin in your unit. Who can give them the necessary VIEW access for both Proposals and Awards in you admin unit?
 - A. Role Manager
 - B. Proposal Data Access
 - C. Award Data Access

03 Research Contact Role Management

Keeping Research Contact Roles current will help mitigate Internal Processing Form (IPF) routing and approval.

Maintain Research Contact Roles

Role Managers should work with their unit head and others in their units, as appropriate, to ensure the Research Contact Roles for their unit are kept accurate and current.



This Photo by Unknown Author is licensed under CC BY-NC-ND

- 01 **Current-ness**
 - Ensure the Research Contact Roles are current
- 02 **Role Manager Changes**
 - Unit Heads request new Role Managers from SPO
- 03 **Unit Head Changes**
 - Unit Head submits Role Delegation Authorization form to SPO
 - Role Manager removes historical IPF Approver and add new unit head

Identifying Research Contacts

Access Research Contacts

From the Cayuse Research Suite:

- Select "Research Contacts"


From Cayuse SP:

- Select "More"
- Select "View Roles By Unit"

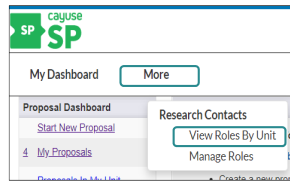
Find the Administrative Unit

- Select "list" or select/click in the text field
- Find and select the unit

The assigned roles will display.

 Contact the listed Role Manager(s) for access to their unit.

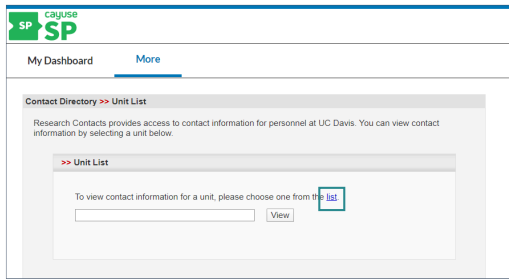
Access from Cayuse SP



Access from Cayuse Research Suite

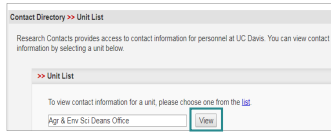


Find the Unit



Find the Unit

- University of California Davis (0)
- College of Agriculture/Env Sci (Non Admin/Home Dept) (01)
 - Agr & Env Sci Deans Office (030000)
 - CAES International Programs (030002)
 - Plant Sciences (030003)
 - UC CalFresh Nutrition Ed Prog (030009)
 - Food Chain Admin Cluster (Non Admin Dept) (030050)
 - Animal Science (030045)
 - Nutrition (030200)
 - Ag Biological Sciences Div (030071)
 - Avian Sciences (030100)
 - EPA Ctr Ecological Hlth Res (030191)
 - Metro Cluster (Non Admin Dept) (030250)
 - Environmental Toxicology (030160)
 - LAWR - Hydrology Program (Non Admin Dept) (030188)
 - Land Air & Water Resources (030190)
 - Wildlife & Fisheries Biology (030350)



View Research Contact Roles


Contact Directory >> Department Contacts

>> Agr & Env Sci Deans Office

Administrator	Title	Email	Phone	Fax	Campus Box	Roles
Abrenilla, Rachel	Analyst III, Spvr	rabrenill@ucdavis.edu	530.754.0275		1950 Research Park Drive Suite 300 Davis CA 95618.6513	Award Data Access, Proposal Data Access
Austin, Bernadette	Associate Director	baustin@ucdavis.edu	(530) 754.3007		1 Shields Ave. Davis CA 95618.6155	Award Data Access, Proposal Data Access
Barbar, Tara	Financial Analyst	tbarbar@ucdavis.edu	530.752.1456	707.875.2000	1950 Research Park Drive Suite 300 Davis CA 95618.6513	Award Data Access, Proposal Data Access
Boulangier, Joyce	Financial Officer	jboulang@ucdavis.edu	530.754.7197		1950 Research Park Drive Suite 300 Davis CA 95618.6513	Award Data Access, Proposal Data Access
Crothers, Laura	Proposal Coordinator/Senior Writer	lcrothers@ucdavis.edu	+1 530 754 8549		141 Robbins Hall Davis CA 95616	Proposal Data Access, Award Data Access

Activity 2: Identify Role Assignments

Find role assignments for Sponsored Programs



- 01 Select "Pause" when you are ready to begin
- 02 Login to <https://ucdavis-uat.cayuse424.com>
 - Username: amieadmin
 - Password: training
- 03 Find "OVCN - Sponsored Programs" and note one person listed in each of the following roles.
 - Role Manager: _____
 - IPF Approver: _____
 - Pre-Award Spending Approver" _____
- 04 Select "Play" when have the answers


Activity 2: Identify Role Assignments

Contact Directory >> Department Contacts

>> OVCN - Sponsored Programs

Administrator	Title	Email	Phone	Fax	Campus Box	Roles
Admin, Amie					Davis CA 95618-6153	Role Manager, Proposal Data Access, IPF Approver
Apple, Charlie		capleh@ucdavis.edu	530-555-5555		123 Gallagher Hall Davis CA 95618-6153	IPF Approver, Pre-Award Spending Approver
Duparron, Terrence	C&G Analyst	cduparron@ucdavis.edu	530-752-4734	530-754-7284	1850 Research Park Drive Suite 300 Davis CA 95618-6213	IPF Approver
Fridenberg, Laura	Admin Assistant II	lfridenberg@ucdavis.edu	916-734-2992		1850 Research Park Drive Suite 300 Davis CA 95618-6213	Proposal Data Access
Help, DR	Default IPF Approver Microcode Notification	cayuseuat@ucdavis.edu			1 Shields Ave Davis CA 95616	IPF Approver
Obelleiro, Kassie	Training Officer	kobelleiro@ucdavis.edu	530-754-7958		1850 Research Park Drive Suite 300 Davis CA 95618-6213	Proposal Data Access, Role Manager
Parks, Christine	Program Coordinator	cparks@ucdavis.edu	530-752-8592		1850 Research Park Drive Suite 300 Davis CA 95618-6213	Proposal Data Access

Managing Roles



Cayuse Research Suite
3.8.0

Research Administration Modules

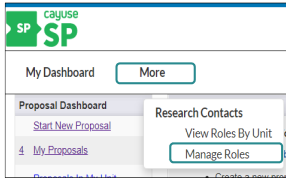
- Cayuse SP (Sponsored Projects)
- Cayuse 424

System Administration Applications

- Backbone
- Research Contacts
- Workflow

Application Help

- Research Suite Support Center



Managing Research Contact Roles

Select or Add a Contact

If the person is not listed in the Contacts drop-down:

- Select "Add Contact"
- Find and select the user's name
- Select "Add Contact"


Add or Delete Roles

To add a role:

- Select the department/unit of the applicable role
- Select the role to add from the Role drop-down
- Select "Add Role"

To delete a role:

- Select "Remove Role" next the applicable role

 View detailed instructions in the [Handbook for Role Managers](#).

Adding and Deleting Roles



Activity 3: Establish a Role

Logged-in as Amie Admin, assign yourself as a Role Manager for "OVCR – Sponsored Programs".




- 01 Login to:** <https://ucdavis-uat.cayuse424.com>
 - Username: amieadmin
 - Password: training
- 02 Access Research Contacts**
 - Select "Manage Roles"
- 03 Assign a Role**
 - Find yourself (use Amie if not found)
 - Assign yourself/Amie as "Role Manager" for OVCR – Sponsored Programs

Learning Objective Review

01 Role Managers	02 Critical Roles	03 Identify Roles	04 Establish Roles
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Contact Us

Let us know how we did: <http://bit.ly/BAASICS-Eval>



Sponsored Programs Office of Research University of California, Davis https://research.ucdavis.edu/proposal-grants-contracts/spo/	Tel: +530 754 7958 Email: spotraining@ucdavis.edu	Kassie M. Obelleiro Training Officer
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04 Resources

Common Acronyms

- AB20: Assembly Bill 20
- AY: Academic Year
- BAA: Broad Agency Announcement
- BUA: Biological Use Approval
- BY: Budget Year
- CGA: Contracts and Grants Accounting
- COI: Conflict of Interest
- ERA: Electronic Research Administration
- F&A: Facilities & Administrative rates; also referred to as indirect cost rate (IDC or ICR) or "overhead"
- FOA: Funding Opportunity Announcement
- GMS: Grant Management System
- HASTOC: Human Anatomic Specimens and Tissue Oversight Committee
- IACUC: Institutional Animal Care and Use Committee
- IPF: Internal Processing Form
- IP: Intellectual Property
- IRB: Institutional Review Board
- PI: Principal Investigator
- RCI: Research Compliance and Integrity
- RCR: Responsible Conduct of Research
- RFA: Request for Applications
- RFP: Request for Proposals
- PHS: Public Health Service
- PRAM: Progress Report Additional Materials (NIH)
- PY: Project Year
- RPPR: Research Performance Progress Reports
- SBIR: Small Business Innovation Research
- SMR: Summer
- SNAP: Streamlined Non-Competing Award Process (NIH)
- SPO: Sponsored Programs unit in the Office of Research
- STTR: Small Business Technology Transfer

UC Davis – Cayuse Resources

- [Cayuse SP Quick Reference](#)
- [Cayuse: Handbook for Role Managers](#)
- [Cayuse SP Role Delegation Authorization Form](#)
- [Cayuse SP Training Videos](#)
- [Handbook for Department Contract & Grant Staff, Principal Investigators and Approvers](#) (For submission to SPO)
- [School of Medicine Cayuse SP Guidelines](#) (For submissions involving School of Medicine units or investigators)
- [Handbook for Department Industry-Funded Clinical Trial Staff, Principal Investigators and Approvers](#) (For submissions to the UCDC Contracts Clinical Trials Contracts Office.)

Sponsored Programs Contacts

- SPO Contact Us webpage: <http://research.ucdavis.edu/contact-us/sponsored-programs/>
- Proposals: proposals@ucdavis.edu
- Awards: awards@ucdavis.edu
- Subawards: subawards@ucdavis.edu
- Closeouts: closeouts@ucdavis.edu
- eRA Help: SPOeRAhelp@ucdavis.edu
- Cayuse Help Desk: ORCayuseHelp@ucdavis.edu
- Training: SPOTraining@ucdavis.edu



Office of Research Listservs

- C&G Listserv: <https://lists.ucdavis.edu/sympa/info/ovcr-cg>
- Other Office of Research Listservs: <http://research.ucdavis.edu/resources/listserv-subscriptions/>
 - Core Facilities Program
 - Digital Millennium Copyright Act (DMCA)
 - Funding
 - Institutional Review Board (IRB)
 - Research Compliance and Integrity (RCI)
 - Responsible Conduct of Research (RCR)
 - Research Unit Lists
- SPARK: <https://lists.ucdavis.edu/sympa/subscribe/spark>



UC DAVIS
SPONSORED PROGRAMS OFFICE

Forum for department research administrators to:

- Ask questions of campus research administration units
- Provide feedback regarding research administration services and processes
- Hear updates from campus research administration units, such as Contracts and Grants Accounting, Sponsored Programs, Research Compliance and Integrity, IRB Administration, IACUC and others

Subscribe to the C&G listserv for updates and reminders: <https://lists.ucdavis.edu/sympa/info/ovcr-cg>

Additional meeting in April and May due to COVID-19

2020

Research Administration Forum
FOURTH WEDNESDAY OF EACH MONTH
8:30 - 10:00 AM
Zoom: <https://ucdavis.zoom.us/j/666666777>

No in person meeting until further notice due to Coronavirus 19

Calendar grid showing months from January to August.

Research Administration Forum
Join us via **Zoom** the fourth Wednesdays at 8:30 am!
Watch previous forums on **YouTube**

Live and Recorded Learning Opportunities

SPO BAASICS
Budget, Application, Award and System Instruction for Comprehensive Skills (BAASICS) are training sessions designed to help contract and grant administrators at UC Davis build and hone their research administration skills. [Learn more](#)

Staff Development and Professional Services Classes
SPO offers classes in the [Research Administration Certificate Series \(RACS\)](#) and the [eRA Train the Trainer certificate series](#).
