cayuse

▶424

Electronic Proposal Development and Submission

User Reference Manual

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Subawards

In Cayuse 424, a subaward is essentially a simplified proposal which contains only a detailed budget, a Performance Site form, and a simplified Key Persons form (with no slot for PI). Like a prime proposal, subawards can use professional profiles, institutional profiles and indirect cost rates specific to the proposing organization if they are available.

Subawards in Cayuse 424 may be standalone, or they may be linked to a prime proposal. Standalone subawards can be viewed in the Proposals tab, while linked subawards are displayed in the Subawards tab.

The Subawards tab appears at the top of Cayuse 424 just to the right of the Proposals tab whenever you are viewing a prime proposal that has at least one linked Subaward.

The tab shows all the subawards for the currently-open proposal.

In both cases, you'll see similar forms when you access the subaward.

Most Cayuse 424 customers can also import subawards that were created in another system (either Subawards.com, Adobe, or another instance of Cayuse 424) and export subawards for use by other Cayuse 424 customers.

Navigating Subawards

Navigating a subaward proposal is essentially the same as navigating any other federal proposal. Refer to the links in that section for information on editing Key Persons, Performance Sites, and the budget. The primary difference is that the PD/PI slot is not available in a subaward (since that role is occupied by a person on the prime proposal).

When you open a standalone (unlinked) Subaward, it opens in the Proposals tab and behaves like any other proposal. When you open a linked subaward, you will see the highlighted connection in the navigation "breadcrumbs."
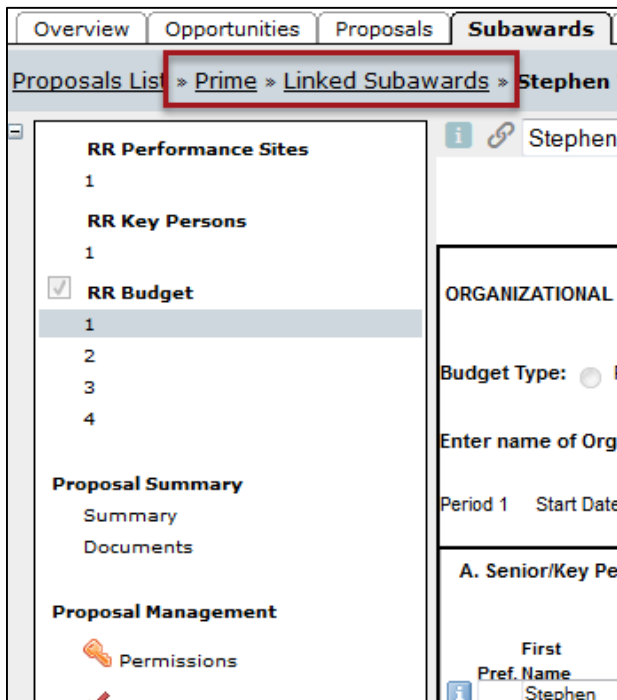
These breadcrumbs allow you to easily navigate between a prime proposal and its linked subawards. Clicking Prime will move you to the prime in the Proposals tab, while clicking **Linked Subawards** will move to you a screen where you can select any of the subawards linked to the prime.

Entering Subaward Data

Subawards that are linked to a prime proposal can display Key Persons, Performance Sites, and budget data within the prime, but the data must be edited on the linked subaward. The prime will display the data as grayed-out, meaning that it is not editable, and will show an **Edit on Subaward** button. Click this button to move directly to editing this data in the subaward.

In versions of Cayuse 424 prior to 4.2, it was possible to edit subaward data in the prime, but this is no longer possible. Subaward data is now edited within the subaward and automatically synched back into the linked prime.

Locking the Subaward

Just as with a prime proposal, while you are editing a subaward it will be locked, preventing anyone else from making edits to it, and any associated proposals will also be locked, **both the prime _and_ all other subawards linked to that prime**. This will prevent anyone else from making changes to any linked primes or subs while you are working within either the prime or its subs. This prevents conflicts between different versions of the data.

Subaward Budget Attachment Form

To view overview data for all your linked subawards, navigate to the Subaward Budget Attachment Form in the prime using the form navigation list on the left. This form shows the following screen:

You'll also see data from any worksheet rows that have been added.

Using the plus symbol next to each subaward's name, you can expand it to see all budget periods. In the screenshot above, University of Denver has been expanded, while Cayuse, Inc. is collapsed to show just the total.

Within each subaward's area, you can use the icon to unlink the subaward from the prime. Clicking the gear icon displays a dialog allowing you to select Key Persons and Performance Sites from the subaward to include in the prime.

Inactive Budget Periods

The checkboxes next to each budget period indicate whether those budget periods are active or inactive.

Making a budget period inactive removes it from the budget calculations that factor into the prime. To make a budget period inactive, go into the subaward by clicking on its name, and then check the **Inactive budget period** box in the upper right corner of the budget form.

Inactive Budget Periods – NIH: NIH applications must not have any inactive subaward budget periods. All subaward budget periods must be completed with the necessary information per Guide Notice NOT-OD-15-073. For a list of the specific fields that must have data in them when entering an inactive subaward budget, please refer to our Knowledge Base for a detailed explanation of this issue.

See also: Create a subaward, import a subaward, link an existing subaward, or add worksheet rows.

Subaward Validations

In general, validations in subawards work the same way as validations in an ordinary proposal. Subawards show validations in the Error/Warning/Info box at the bottom of the proposal for the included forms, including the Key Persons, Performance Sites, and Budget.

Linked subawards reflect the validation type of the linked prime proposal, while standalone subawards can select any available validation type. The errors and warnings shown will reflect the validation type selected.

When a subaward is linked to a prime and there are errors in the subaward, the prime also displays a single error for each linked subaward indicating the number of issues.

This error is a Cayuse 424 error, but it is one that you must take seriously. If there are errors in your subaward that will

prevent successful   submission, you must resolve those before submitting the proposal.

A similar Warning entry will be displayed if the subaward has warnings. Warnings highlight important items to include or issues to resolve, or situations that may cause problems when your proposal arrives at the agency, so you should attend to the warnings in the subaward and resolve them appropriately before submission.

These errors and warnings will also be highlighted when you validate the prime proposal prior to submission.

Errors or Warnings in Subproposals

There are 3 errors in the subaward proposal; there is 1 warning in the subaward proposal:

Stephen Weaver Test Proposal: 3 errors; 1 warning

If you are seeing this note when validating prior to submission, be sure to resolve the issues before proceeding to submit the proposal.

Info Tips in the Subaward

On occasion, an Info tip may appear in a subaward recommending that you review your prime proposal for the inclusion of certain information or documents. This occurs when you have entered data in the Subaward that triggers a requirement for additional documentation

in the prime. Since Cayuse 424 cannot verify the prime proposal information from the subaward, it simply presents the info tip. These info tips must be taken seriously since absence of the appropriate documentation can cause the proposal to be rejected.

Creating Subawards

There are two ways to create subawards in Cayuse 424: one from the Proposals tab, which creates a standalone subaward that is not linked to any prime proposals, and one from within a prime proposal, which creates a subaward linked to that prime.

To facilitate creation of a subawards, it's best if there is already an institutional profile for the subcontractor and professional profiles for the subcontract Key Persons with institutional associations to the institutional profile. If you can't create an institutional profile, you should contact your local administrators to have one created. At a minimum, the profile should have an Organization Name, a DUNS number, and at least one named IDC rate with a start date established for the rate.

Creating a Linked Subaward

If you already have access to the prime proposal you want to link a subaward to, then it is easier to create your new subaward from within the prime, where it will be automatically linked and will inherit the prime's budget period structure and validation type.

1. Access the prime proposal.
2. Navigate to the **Subaward Budget Attachment** form.
3. Click the **Create Subaward** button.
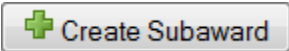
4. This will bring you to the following dialog:

5. Enter a name for the subaward.
6. Select the applicant organization from the dropdown list. This is optional, so if your organization is not yet available as an institution, you can add it later.
7. Select the number of Budget Periods.
8. Enter a due date for the Subaward.
9. Click **Create Subaward**.

You'll be taken to the Subawards tab to edit your new subaward.

Creating a Standalone Subaward

Any subaward is intended for eventual inclusion in a prime proposal, but that prime may be at another institution or may not have been   created yet. In these cases, a standalone subaward can be created rather than creating a subaward from within a prime.

1. Navigate to the Proposals tab at the top of the Cayuse 424 interface.
2. Click **Create Proposal** ![Create Proposal]. You'll see the initial Create Proposal dialog:

3. Select Subaward Proposal and click **Create**. You'll see the Create New Subaward dialog:

4. Enter a name for the Subaward.

5. Select an Organization from the dropdown menu. This is not required, so if your organization is not yet available as an institution, you   can add it later.
6. Select the number of Budget Periods.
7. Enter a Due Date for the Subaward.
8. Select the validation type. If you don't know it, don't worry, it can be changed later.
9. Click **Create Subaward**.

When done, you will be taken into the subaward and will be able to edit the subaward and add data.

Importing Subawards

Cayuse 424 can import subaward proposals from external sources, making it easy to edit them in Cayuse using all the tools you are used to.   There are three sources for importable subawards:
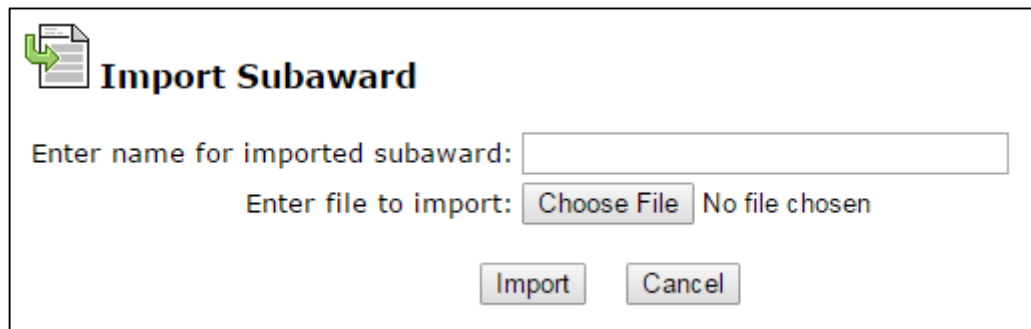
- Stand-alone subawards created within Cayuse 424 by a user at another institution.
- Subaward proposals created on Subawards.com.
- Adobe subawards (extracted from the Abode application packages).

To import a subaward, your collaborator must have previously sent to you the exported file, and it must be accessible to you on either your computer's hard drive or a shared network drive.

As with creating a subaward, you can import a subaward so that it is linked from the prime already, or as a standalone subaward.

Importing a Linked Subaward
1. Navigate to the Subaward Budget Attachment Form in the left panel of the prime proposal.
2. Click the [Import Subaward] button in the upper right.
3. Select a name for the subaward, and navigate to the location of the subaward file on your computer or shared drive.

4. Click **Import Subaward**. You'll see a screen showing the budget periods of the prime and subaward.

Note: NIH no longer permits subawards that do not have the same number of budget periods as the proposal.

5. If any action is necessary to reconcile the budget periods, a message about that action will be shown; otherwise, the dialog will   indicate that no action is necessary.
6. Use the arrows to align the budget periods appropriately.
7. Click **Link in Subaward** (or **Cancel** if you need to make additional modifications before import).
8. You'll see a report about Importing Key Persons and Performance Site data.
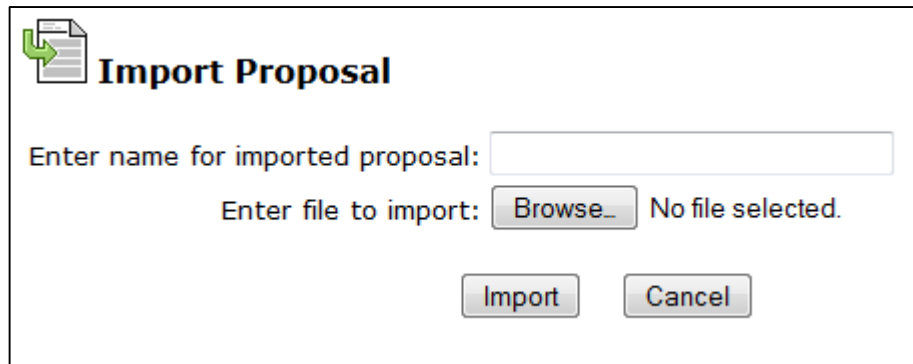
9. Click **Finish**.

The subaward proposal will be linked to the prime proposal from which you imported it, and will automatically open for editing.

Importing a Standalone Subaward

1. Go the Proposals tab.
2. Click the [Import] button at the top of the screen. This will launch the Import Proposal dialog.
3. Type a name for the subaward into the empty text field, click **Browse**, and navigate to the location of the subaward file on your computer or shared drive:

4. Click **Import** .

The subaward will open for editing, and you'll be able to see it in the Proposals List as you would any other proposal.

If you have imported an Adobe subaward and are wondering where the Budget Justification is, see the Knowledge Base article entitled I   imported an Adobe subaward and I don't see the Budget Justification. Where did it go?

Exporting Subawards

If you are working on a subaward proposal that is for another institution that uses Cayuse 424, you can complete the subaward within 424 and export it for use by the other institution. The export process creates a *.cayuse* file containing the subaward data, which can be imported by   the other customer.

Only standalone subawards can be exported. Linked subawards cannot be exported, since a linked subaward is intended for submission with   its associated prime.

To export a subaward:

1. Open the subaward proposal from the Proposals List.
2. Select the 🗐 button in the upper right gray bar, or in the lower left Proposal Management area.
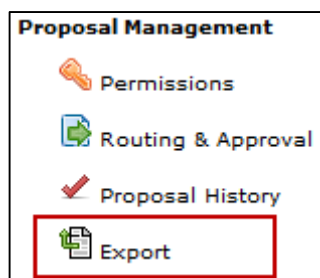
3. On the Subaward Export screen, give the subaward file an informative name.

4. Click **Validate Subaward** to ensure that there are no errors before exporting.
5. Click **Export Subaward**.
6. You'll be prompted to open or save the .cayuse file. Save the file to a convenient location on your computer.

You won't be able to open the file yourself. It's a special file format that can only be opened by Cayuse 424. After saving the file, just send it directly to your collaborating institution so that they can import the file as a subaward proposal.

Linking Subawards

The process of attaching a subaward to a prime proposal is called linking. When a subaward is linked to a prime proposal, it will be submitted with that proposal, and will also display with that proposal in the Proposals List. A proposal with attached subawards will be indicated by a + or - beside the Prime proposal. A subaward can only be linked to one prime proposal. When the prime proposal is open, the subaward can be opened from the Subawards tab and its information is included on the Subaward Budget Attachment Form.

Information Transfer From Linked Subawards to the Prime

When a subaward is linked to a prime proposal, the following data transfer occurs:

- Any Key Persons or Performance Sites on a linked subaward proposal are automatically copied into the Prime.
- The subaward's total costs (direct + indirect) for each of the budget periods are added into Item F.5 (Subawards/Consortium/Contractual Costs) in the R&R budget.
- The subaward Indirect Cost is added to the Direct Cost to obtain the Total Cost for each budget period.
- The prime's Indirect Costs on the subaward will be added to the Indirect Base for one of the named rates that you

specify. This appears on page 3 of the Detailed Budget in an extra field called **Allocated IDC Base** designed for this purpose. A sample is shown below.

Note that you can use this Allocated IDC Base field even if you do not use the Subaward Budget page.

Subaward Key Persons and Performance Sites

All Key Persons and Performance Sites on a subaward proposal that is linked to a Cayuse 424 prime proposal are automatically copied into the Prime, but you can choose to exclude them by unchecking the **Include in Prime** checkbox(es) in the upper right of the subaward's Key Persons and Performance Sites forms. To add them back, return to the subaward and check the box again.

Permissions for Linked Subawards

Permissions for linked subawards are governed by the prime. Since the subaward cannot be directly edited without opening the Prime, everyone who had write access on the subaward will no longer have that permission, and those with write access on the prime will be able to open and edit the subaward.

Validation Type

Linked subawards have the same validation type as their linked prime proposal.

Linking to a Prime

If you have imported a subaward directly into the Proposals List, or otherwise developed it within Cayuse without linking to a prime, you will need to link it to a prime in order for its data to attach to that proposal.

First, open the intended prime proposal, and go to the Subaward Budget Attachment Form within that proposal. At the top of that form you'll should see the following options:

Click the **Link Subaward** button. You will see the following dialog:

Select the subaward from the list of all unlinked subawards currently existing in your instance of the Cayuse 424 system.

When you select the subaward you want to link, the budget periods of the Prime and the Subaward will be compared below it, allowing you to see how they match up. If these budget periods do not perfectly align, those within the subaward will be automatically matched to the prime when you click **Link in Subaward**.

If your subaward has fewer budget periods than your prime, you will be given the option to use the up and down arrows to adjust the aligment of the budget periods.

After you select the subaward and match up the budget periods, click **Link in Subaward**. The Key Persons and Performance Sites on the subaward will be included in the Prime:

Click **Finish** and your subaward will be linked to your prime proposal.

Synching Subs and Primes

If you change budget, key person, and/or performance site data in one of the linked subawards, Cayuse 424 will automatically update that data in the prime as well.

Subawards with Empty Budget Periods: Cayuse 424 expects all Subawards linked to a Prime to have the same number of budget periods as the Prime (and the same dates). When you import a linked subaward or link a subaward to a prime, it will bring up a dialog asking you to match up the sub's budget periods with those   of the prime.
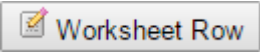
Any empty periods will be marked as inactive, and the others synced according to your assignment, so there is no need to fill in any "blank" or   "dummy" periods in your subaward.

Note: NIH no longer permits subawards that do not have the same number of budget periods as the proposal.

Using Subaward Worksheet Rows: The table on the Subaward Budget Attachment form also operates as a **Subaward Worksheet**, to which you can add a row or rows without a detailed Subaward behind it. You can then fill in subaward numbers manually.

To add a new Worksheet Row, click the [Worksheet Row] button at the top of the Subaward Budget Attachment Form and scroll   down and click the plus sign to the left to fill in cost data for each budget period (the total is a calculated field and can't be filled out directly).

The worksheet row will be listed on the Subaward Budget Attachment Form in a similar manner to a true subaward, but because it doesn't correspond to a separate subaward proposal, there is no link to click, and the unlink button is replaced by a delete button:

Period	In-active	Subaward Direct Costs	Subaward Indirect Costs	Subaward Costs	Allocated to IDC base
testNumber2					Error(13) / Warning(8)
1	☐	7,109	0	7,109	7,109
2	☐	7,322	0	7,322	7,322
3	☐	7,542	0	7,542	7,542
4	☐	7,768	0	7,768	3,027
5	☑				0
Total		29,741	0	29,741	25,000
⊞ Subcontract					✖
Total		10,000		10,000	10,000
⊞ All Subawards					
Total		39,741	0	39,741	35,000

Worksheet rows are useful for what-if scenarios, placeholders, and flowing numbers into modular budgets. Proposals using modular budgets cannot also submit detailed subaward data, and by using a worksheet row, the appropriate budget data will flow from the from the table into the modular budget, where the Subaward IDCs can be excluded for determining the direct cost modules.

You can also use worksheet rows to attach additional subaward data when you're reached the limit of allowed subaward budget attachments. Depending on the form that is provided with your opportunity, you may reach this limit at 10 or 30 subawards. If your proposal exceeds this limit, you can create worksheet rows for the additional subawards so that you can calculate costs correctly. In this case, you would also attach the subaward details as part of the Budget Justification.

Warning: *A Worksheet Row is not a substitute for a Subaward!* Neither Grants.gov nor NIH can extract information implied in a worksheet row. For instance, NIH needs to know what the Indirect Costs are for the subcontract in order to check your proposal against funding limits, and they can only get this information if you fill out a subcontract.

Unlinking from a Prime

To unlink a subaward from its prime proposal, open the prime and go to the Subaward Budget Attachment form. To the right of each subaward in the list you will see the ☾ Icon. Click that to be taken to the following screen:

Here you can choose to simply unlink the subaward, returning it to the Proposals List for later use, or to instead Unlink and Delete it all at once. If you delete the Subaward, no other user will be able to see or use it.

After unlinking, all Budget Data, Key Persons, and Performance Sites from the subaward will be removed from the Prime proposal.

Routing

Cayuse 424 supports the electronic routing from proposals from the PI to the final approver. If routing is active in your Cayuse 424 application, you will see the Routing tab in the list of tabs across the top. Clicking on this tab will show you a list of proposals that may need your review in the near future.

If the list is empty, no proposals are being routed to you.
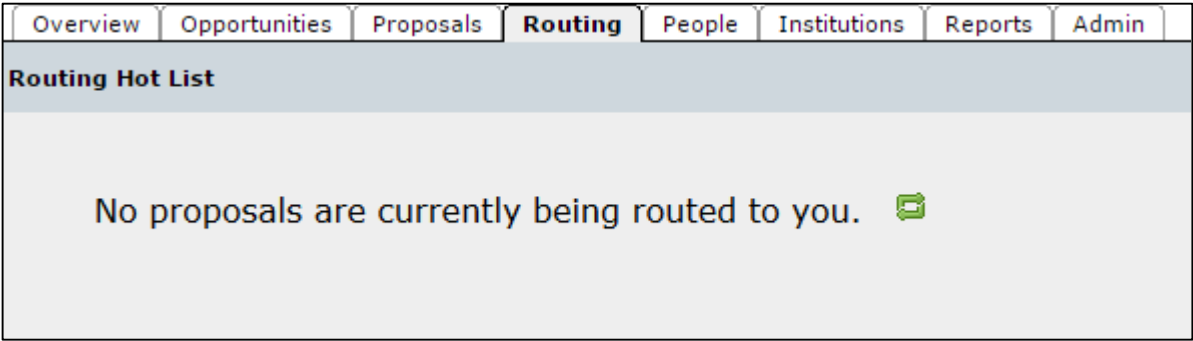
If the list contains proposals, these proposals list you as part of the "routing chain", the list of people who must approve the proposal before it can be submitted. The proposal is listed with an indication of how many "steps away" it is, which shows how many people have to approve it before it will reach you. If the number is zero, you are the next approver. It also shows how long the proposal has been awaiting your action.
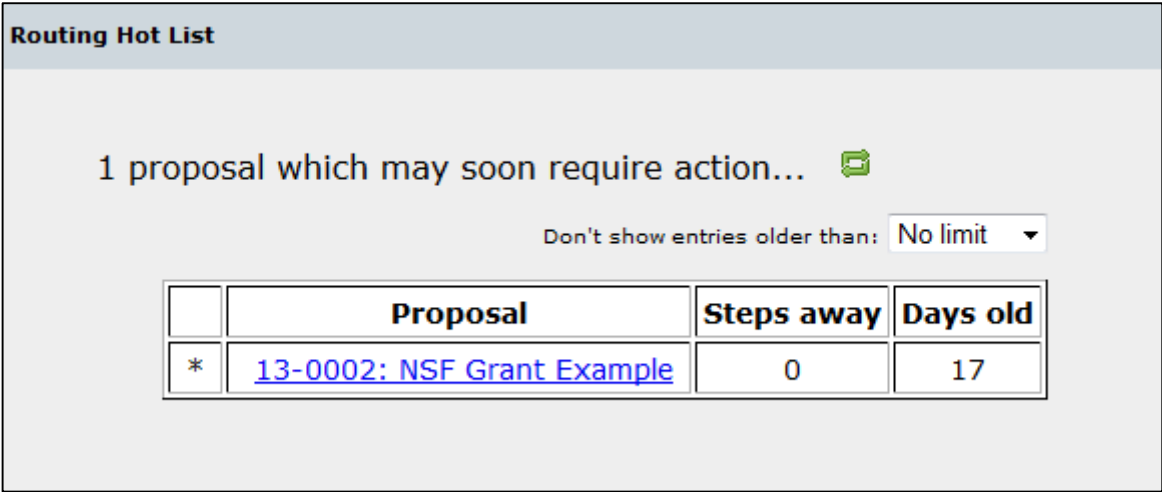
When you click on a proposal to review it, you will be taken to the proposal. After review, click the ☑ button. This takes you to a screen where you can approve the proposal by clicking on a box next to your name:

You can also retract the proposal's approval and "send it back" to the appropriate person in the chain for revisions by unchecking the box next to that person's name. Any later approvals will also be retracted, as each of those people must re-review the proposal after any necessary changes are made.

At any time during routing, the PI or other "first approver" can also "recall" the proposal by unchecking the box next to his or her name. This resets the entire routing process.

The Routing Process

Once a proposal is completely prepared, the PI (or other first approver) can begin the routing process. If the routing chain needs to be edited before routing can begin, see Editing Routing Chains.

1. Click the ⬗ button to view the proposal's routing chain.
2. Click the box next to their name.

This causes several events to take place:

- The routing event is logged in the Routing History as well as in the Proposal History.
- Email is sent to the next person on the routing chain that an approval action has taken place and their attention is required.
- An entry is added to each routing chain member's Routing Hot List listing the proposal, the number of steps before they need to approve, and how long it has been waiting.
- The PI's access rights to the proposal forms are curtailed. Attachments, such as the Research Plan, can still be modified and added, but no changes can be made to the form data or the budget.
- The next reviewer in the routing chain, if they did not have full access to the proposal, is granted full access. This access only lasts until the reviewer accepts or rejects the proposal. (Delegate(s) of the next reviewer will also have this access.)
- Other reviewers also have enhanced access while the proposal appears in their Routing Hot List.

Each approver takes the approval action in turn until the proposal reaches the final reviewer, generally the AOR.

AOR Approval

Once the AOR has determined the forms are ready for submission to Grants.gov, they can approve the proposal for submission. After the AOR approves the proposal, all chain members (including the PI) are notified by email.

In some organizations only the AORs submit proposals. In this case, the AORs can proceed with submission of the approved proposal. Other users would find the Submit button disabled and would not be able to submit. If your system is configured to let others submit after AOR approval, then those other users would be able to submit the proposal

after the AOR's approval.

Rejecting a Proposal

As described briefly under Routing, there are two types of rejection actions:
- **Retract:** This is performed by any reviewer by unchecking the box next to any name that has already approved the proposal. In this manner, the proposal is sent back all or part of the way for an overhaul or quick fix. It could be tweaked and re-approved and be back on track.
- **Recall:** This is performed by the PI by unchecking the box next to his/her name. This cancels the whole approval process and the proposal is back to the start.

When a reviewer retracts the proposal, returning it to another person in the routing chain, the person who then needs to re-approve the proposal will receive an email notification letting them know they need to review and re-approve. If the reviewer retracts their own approval, no email notification will be sent, since they must take the next action.

Routing Non-Federal Proposals

Routing non-federal proposals is not fundamentally different from routing federal proposals, except that the electronic submission authority of the AOR is not critical. The rest of the process is the same: the routing chain can be created and edited, and the proposal can be routed from approver to approver as each one checks the box next to their name, until the final approval is granted.

Editing Routing Chains

The list of people who must approve a proposal before it can be submitted is the "routing chain" for that proposal. The routing chain can be edited both before and during routing.

Viewing the Chain

To see the routing chain, click the 🖼 button in the proposal.

The chain is shown from the beginning (first person in the list). The routing chain generally begins with the Principal Investigator by default, although at some institutions it may be built from the proposal's creator.

Editing the Chain

Each proposal has its own routing chain that can be modified at any time before final approval. To edit a routing chain, click the **Edit Chain?** button shown above the routing chain. You'll see the following dialog:

To add a person to the routing chain, click the green plus button at the appropriate location in the chain. This will bring up the Add to Routing Chain dialog.

To find the person you want, either select from the list, or use the Search box or the Show All function to see the full list. To select someone in this dialog, they must have a Professional Profile that is linked to their user account. The profile or associated user account must also have a contact email address, or you will not be able to add the person to the chain. Routing information is provided through email.

You can add someone other than the PI or proposal creator to the beginning of the chain, although this would be unusual. To remove someone, click the X button next to their name.

If some people have already approved, it will not be possible to modify that part of the chain. The approvals would have to be retracted in order to add an additional person.

Because the later part of the routing chain can be modified at any point, it is possible to build a routing chain simply by each approver knowing the next person who should approve and adding them to the chain, until the proposal eventually reaches the AOR for final approval. The Cayuse 424 routing system is therefore highly flexible and easily customizable.

Adding an AOR

When routing is active, electronic submission authority generally resides with Authorized Organizational Representatives (AORs), and proposal preparers must seek approval from an AOR to electronically submit their proposals, so an AOR should be listed on every routing chain.

Depending on your institution's configuration, certain users (such as Admins) may be able to submit the proposal either before or after approval by the AOR. The Routing and Approval page indicates whether an AOR is included on the chain and whether they have approved:
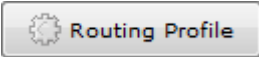
Creating Routing Profiles

Although each Cayuse 424 proposal has its own routing chain that can be modified during the approval process, if you have a standard   routing process, it may be convenient to set up Routing Profiles so that routing chains can be auto-built at the time that the proposal is   created.

Setting up a Routing Profile

Routing profiles are stored in each person's Professional Profile. In order to set up routing profiles, each user who is part of the chain must have their user account linked to their Professional Profile, and the profile or linked user account must contain an email address and be available to those who need to add it to a chain for routing purposes.

To access the Routing Profile, click the ⚙ Routing Profile button at the bottom left of the Professional Profile. The Professional Profile can be reached by navigating to the People tab and either searching for a person, or selecting a person from the list of recently viewed people. People can also be sorted by institution using the dropdown that is below the search box.

The routing profile allows the designation of a Next Reviewer for the person as well as a Delegate. A Delegate is someone who has the authority to approve the proposal in case the reviewer is unavailable. A Next Reviewer is the person who should appear next on the routing chain.
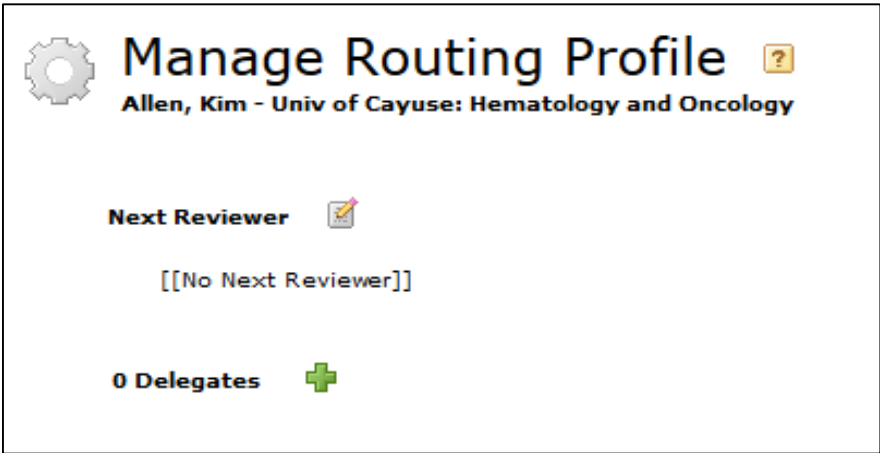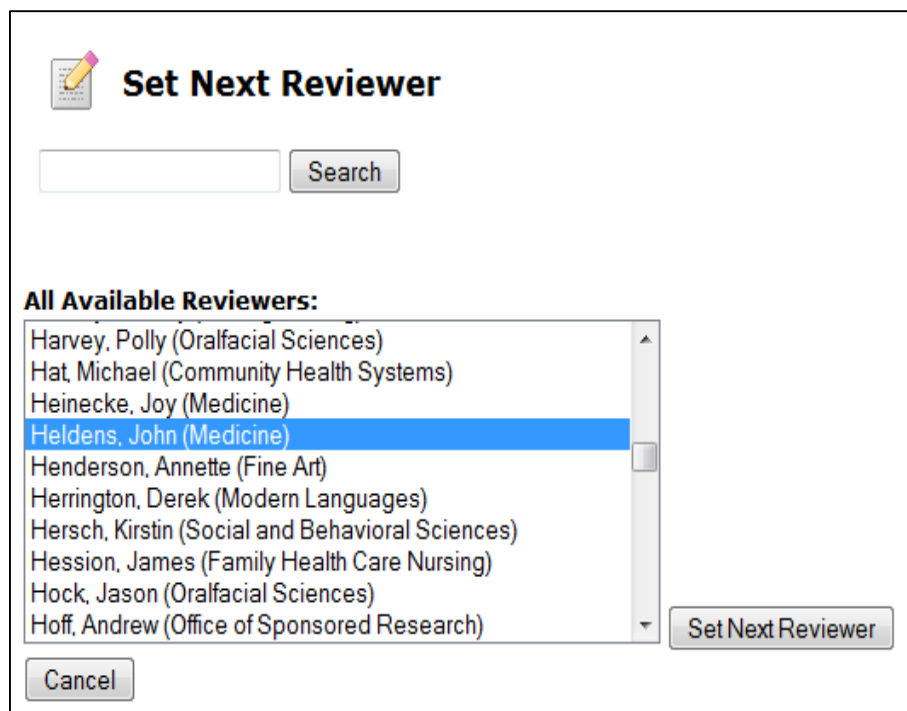
Assigning a Next Reviewer

Depending on who the user is, their next reviewer will differ. If the organization uses a routing hierarchy such as:

1. PI > Department Chair > Dean > AOR > submit

Then the Next Reviewer for all PIs in a Department would be their Department Chair. To assign a Next Reviewer, click the pencil icon. You'll see the following dialog:

If you don't see a list of reviewers to select from, use the Search box or click the **Show All** link. When you've selected the person you want, click **Set Next Reviewer**.

If you can't find the person you want here, and you know that you can see their profile, it may be that adding them as a next reviewer for you would create a circular routing relationship. That is, they are already the next reviewer for you or someone prior to you in the routing hierarchy. The next reviewer relationships cannot be circular, since routing chains are intended to be linear.

Assigning Delegates

Inevitably, there are times when a reviewer is not available. If you have assigned the reviewer a Delegate, the Delegates can act in their stead. Delegates can see routed proposals their Reviewer sees and get the same notifications as the reviewer does, both by email and within Cayuse

424. Note that delegation is not transitive. A delegate of your delegate has no permissions to act for you. They only have permissions to act on the behalf of the person they are directly assigned as a delegate of.

To add a delegate, click the green plus button. You'll see the following dialog:

As above, use the Search box or click the **Show All** link to see all available delegates. You can select multiple delegates simultaneously by holding down the <Ctrl> key (or <Command> for Macs). Then click **Add Delegates**.

After you complete the process, the Next Reviewer and Delegates will be displayed for the Profile.

Click **Close** to exit.

Once your routing profiles are set up, the routing chain can be built automatically when the proposal is created. The chain can also be auto-built later from any user in the chain, using the **Auto-build chain** button for that user in the Edit Routing

Chain area.

Edit Routing Chain [?]

People In The Chain (start to finish)	Remove Person	Insert Person	Auto-build Chain...
		➕	⬇ Auto-build...
Campo, Lawrence - Univ of Cayuse: Clinical Pharmacy	✖	➕	⬇ Auto-build...
Ace, Mark - Univ of Cayuse: Office of Sponsored Research	✖	➕	⬇ Auto-build...
Grant, Alexis - Univ of Cayuse: Bioengineering	✖	➕	⬇ Auto-build...

This means that even if the whole chain cannot be built at the time of creation, part or all of it can be built later by editing the routing chain within the proposal

People

The People tab in Cayuse 424 represents the professional information of people in the system: their professional profiles. Professional   profiles contain the information that funding agencies require from Principal Investigators, Key Persons, Other Significant Contributors and Authorized Representatives. This information is added to the appropriate forms in a proposal when the person is autofilled into the proposal.

By default, the People tab shows profiles you have viewed recently. Depending on your institutional configuration, you may be able to see everyone in the system, or just a few people. Most commonly, all users can see and search for all professional profiles.
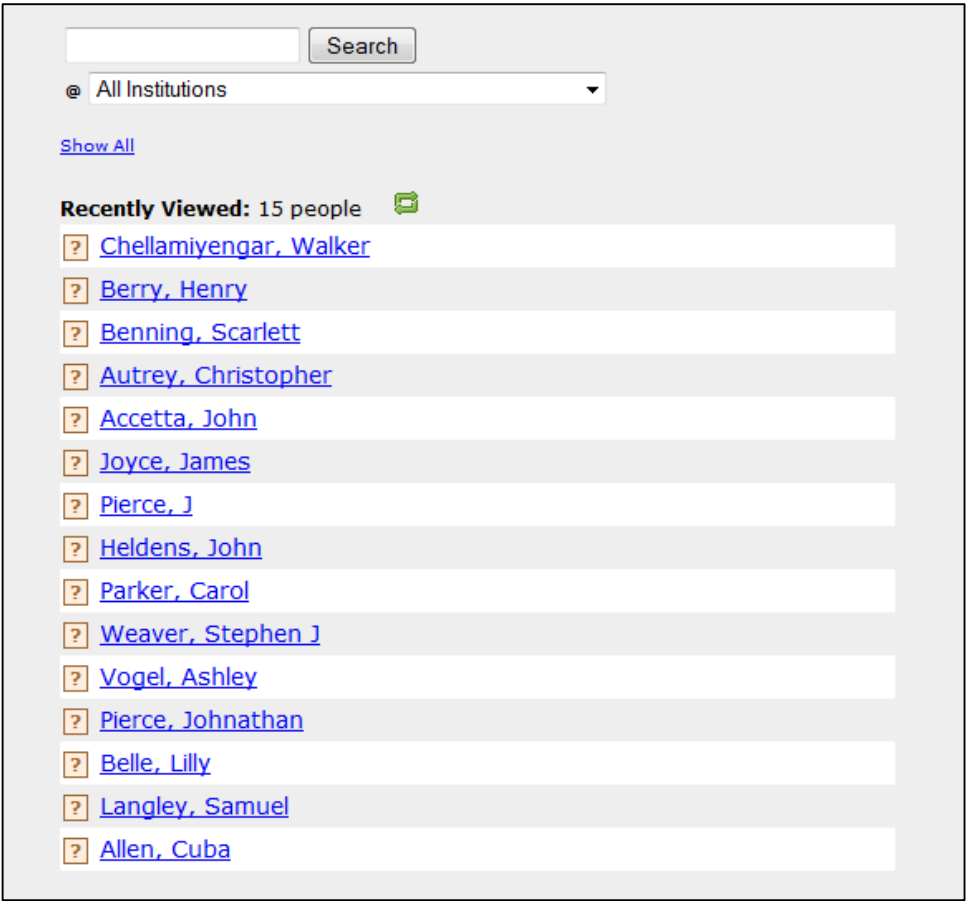
To search for a profile, enter the person's name into the search box at the top of the screen. You can enter the full name, first or last name, or the first few letters of the first or last name. To limit the search to a particular institution, if you know which institution the person is associated with, select one in the second box. Institution short names are included in the drop-down to help distinguish between institutions that have similar long names.

Note on People Search

When searching for people, you can enter more than one name into the search box, separated by a space. Unlike when searching for an   institution, this is an OR search, and the results will include people whose first or last names begin with either of the name fragments you   entered. The People search only searches for names that start with the search string. For example, searching for "Jane Cooper" will also   return results for "Mark Coopering" and "Janeine Jones", but not "MaryJane Reynolds".
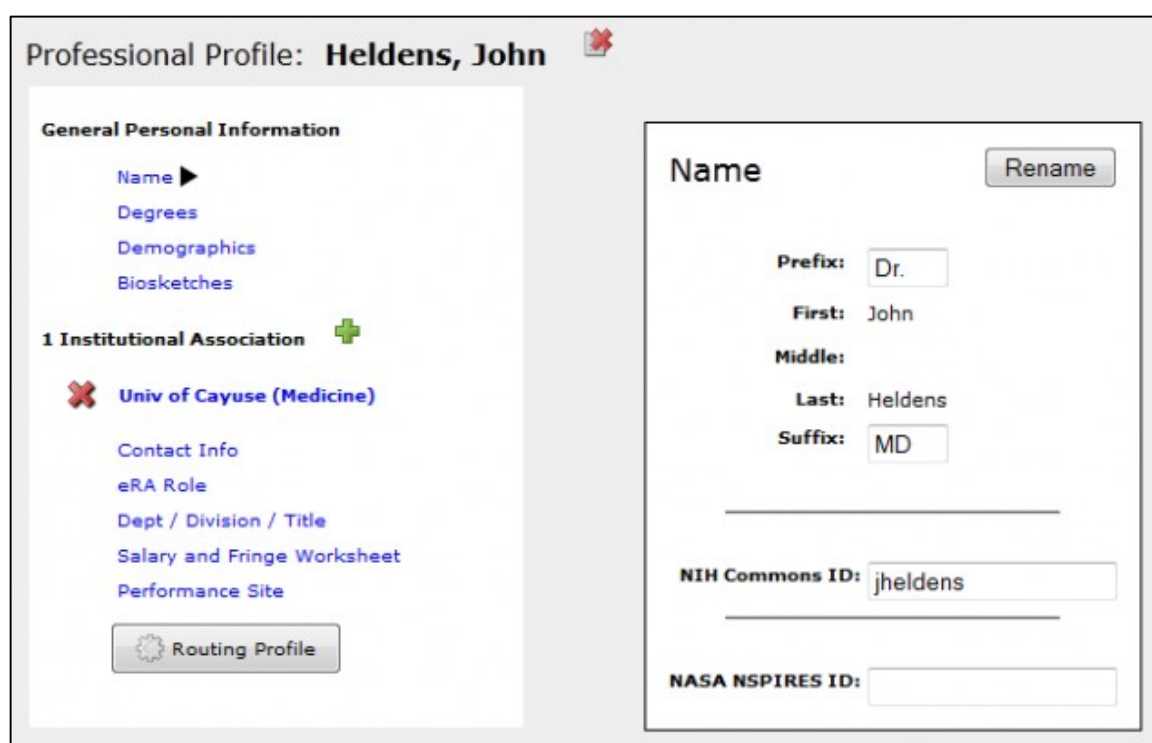
To show all profiles you have access to, click **Show All**. (If you can see many profiles, this may take a few moments.) You can navigate to the   right part of the longer list by clicking the first letter of the person's last name.

To create a new professional profile, click the ⊞ Person   button.

To visit a profile, click on the person's name. If you have permission to read the profile, it will open to show you the person's information.

General Personal Information

Professional profiles have two parts. The first part is the General Personal Information, which includes basic proposal-related personal   information: name, degrees, demographics, biosketches (stored as PDF or word-processing documents).
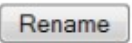
A name is required to identify the profile. The other information is optional, but can be very helpful for submitting certain types of proposals.   For example, an NIH Commons ID would be useful if you frequently submit NIH proposals. The more information you enter here, the more fields will be auto-filled during proposal creation. This will make the proposal creation process faster and easier.

Name

If the Profile name is incorrect or has changed, you can use the **Rename** button shown to the upper right of the name.

Degrees

There are two fields for degrees, one following the NIH format and one following the NSF format. For NIH proposals, separate each degree by a comma. Use the drop-down menu to select an NSF Degree Type.

Demographics

This section contains demographic information frequently required on NSF proposals.

Biosketches

Biosketches can be uploaded and stored in Cayuse 424, making them easily accessible to you and your collaborators as you assemble proposals. You can add multiple biosketches within a profile, and you can store both the source file (usually word processor format) and the final PDF file in Cayuse 424.

When the source file is uploaded, the **blue yes link** is active in the src column. To add a biosketch, follow these steps:

1. Click the ➕ button next to Biosketches. Cayuse 424 will prompt you for a name for the biosketch.

2. Enter a good identifying name and click **Next**, and you'll see the dialog below.

3.

4. Browse to the PDF file on your computer and click **Next**.
5. If you want to also upload the source file, in the next window, browse to the file on your computer.
6. Click **Done**.

To delete a biosketch from a professional profile, click the ✖ icon on the far right of the row in the table.

Institutional Associations

The second part of a professional profile is an institutional association: a link between a person and the institution that employs them. This part of the profile holds all the information about the person that is specific to their position at the institution: their contact information, position and role, salary and benefits information, and their performance site.
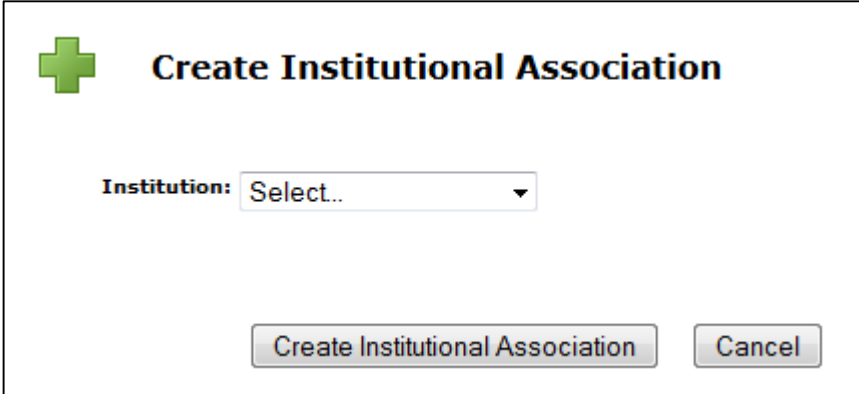
If the person for whom you are creating or updating a professional profile does not have an institutional association, or

you need to add a new one, click the [+] next to the count of their institutional associations in the left sidebar, as shown above.

You'll see the Create Institutional Association dialog:

In the Institution dropdown, select the desired institution. All Cayuse 424 applications have at least one institution that profiles can be associated with: the home institution of the organization. Normally you will want to select this institution for associations. The short name for the institution is included in the drop-down to help distinguish between institutions that have similar long names.

However, if the person you are adding or editing is external to your organization, you may not see their institution here. The institutions you see in this list are those institutional profiles that are available to you. If you don't see the desired institution in the list, you will need to find out if it exists in your system. If it does not, you may be able to create one, but in most cases you will need to ask your System Administrator to create one for you.

Contact Info

Contact Info includes the mailing address of the person at the institution as well as phone and email contact details. The information in the Contact Info screen will be auto-filled into a proposal when the person is selected as a PI or a Key Person.

eRA Role

The role you select here will determine where the person is included in lists or search results to be added to a proposal.

- Principal Investigator: The person will be included when selecting a PI or Key Person.
- Administrative Official: The person will be included when selecting a Person to be Contacted In Matters Involving this Application.
- Signing Official / "AOR": The person will be included when selecting an Authorized Organizational Representative.
- Payee: The person will be included when selecting a Payee for Environmental Protection Agency (EPA) proposals.

The Assistant option is available for informational purposes but does not affect autofill inclusion.

Dept/Division/Title

Enter the person's department, division (if any) and position title. If the institution the profile is associated with has Organizational Units, you can select these from the dropdown menu above the fields in order to fill in the department and division quickly and easily. Unit names are limited to 30 characters. In some cases you may be required to select units from the list in order to enforce consistent unit names. Position or title is always entered by hand.

Salary and Fringe Worksheet

See Salary and Fringe.

Performance Site

Information for the person's physical location. When the person is autofilled onto a proposal as the PI, this site will appear in the Performance Sites list, and if they are given another Key Person role, the site can be added easy using Performance Site autofill.

The Performance Site can be autofilled in the professional profile by clicking the **Fill from Contact/Org Info** button.

Routing Profile

See Creating Routing Profiles.

Salary and Fringe

Salary and fringe benefits information is stored in the Salary and Fringe Worksheet section of a professional profile's institutional association. The section is called a Worksheet because you can enter and edit all the information so that it is accessible later for computations in proposals.

The Employee ID field is optional and may be used to link Cayuse 424 data with other systems.

Appointment Type and Salary

The Salary / Appointment Type section includes both the type of appointment the person has — Academic/Summer or Calendar appointment— and the salary information.

Salary information is optional, and each Cayuse 424 customer makes its own decision about whether to provide salary information in the professional profile. Including this information makes autofilling a person into a proposal very quick because it means that Key Person budget computations can be completed automatically. Otherwise, the salary information must be entered by hand in each proposal for calculations to occur.

Even if salary information is not included in the profile, the appointment type information should be included, indicating the number of months the person has on their Calendar or Academic/Summer appointment. If including salary, list salary in the field corresponding to the appointment type. Changing an existing appointment type in a proposal can create errors in the proposal.

Fringe Benefits

If the institution the profile is associated with has a base fringe rate assigned, that rate will show here:

If additional fringe rates have been set in the institutional profile, these rates can be imported by clicking **Import Institutional Rates** and selecting from the list. You can import as many categories as you need.

Fringe rates can be entered as percentages or as dollars. If there are dollar amounts entered in the Fringe Worksheet, those amounts will be added into the Fringe Rate Total if the salary is entered (as shown above with the "Special" rate). If percentages are used, then the Fringe Rate Total can be calculated based on the entered percentages, without the base salary.

If the person has unique fringe rate needs, click ✚ New Row to add a local row and fill in a percentage or dollar amount. To change an imported fringe rate, click the small down arrow next to the fringe rate name.

The institutional fringe rate list will appear and you can select a different rate.

If you don't see the rate you need, and you have access to the institutional profile, you can add the rate in the institutional profile (follow the link above for instructions). If you don't have access to the profile, you can add the rate by hand for the individual, request access to the profile, or ask an Admin to add it for you.

Controlling Access

Because professional profiles are most useful in proposal completion when all Cayuse 424 users can view them and autofill the information into proposals, the application is almost always set up to allow this.

However, some information in profiles, such as salary, may be sensitive information. Depending on institutional policy, such information may be omitted from the profile, meaning it will have to be entered by hand into each proposal after the profile is autofilled; or the sensitive information may be included, but profile visibility limited to the creator of the profile and the Admins.

To see who has access to a profile, click the 🔑 in the upper right corner of the main screen to bring up the Permissions screen.
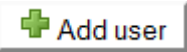
The Permissions screen only shows permissions that have been explicitly assigned. It does not show whether Admins or all users automatically have the ability to see and autofill the profile.

In the Permissions screen shown below, the user 'mspears' has been explicitly assigned permissions to the Professional Profile, and consequently can read and autofill this particular profile. The profile's creator, 'jheldens,' can edit the profile, add people who can access it or change their permissions, and delete the profile.

Profiles created manually grant full permissions to the user who created them, while profiles created through the bulk load process grant full permissions to the user they are linked to. If, after creation, the user linked to the profile does not have permissions to edit it, but institutional policy allows them to manage their own profile, they may be added to the permissions manually.

Adding a User

1. Click the [**+ Add user**] button.
2. Select a user from the list, or search for another user to add by name or username. You can use **Show All** to show all users. The user is added to the profile's permissions. If the user is grayed out, they have already been added to the permissions.

3.

4. Close the selection window by clicking the Close link or button.

Editing Permissions

Once you've added someone to the permissions, you can change their permissions (if you are allowed to do so) by checking and unchecking the boxes to give them the right level of access.

The following table describes the permissions associated with Professional Profiles.

Permission	Description
List	Users with this permission will see the profile in lists, but cannot view or modify the details of the profile.
Read	Users with this permission can see all the data the profile, but cannot modify the data.
Write	Users with this permission can modify all data within the profile.
Autofill	Users with this permission can autofill data from the profile into grant proposals. This permission allows users to use the profile as intended: to quickly complete proposals.
Delete	Users with this permission can delete the profile.
Change Permissions	Users with this permission can change the permissions associated with the profile.
Add User/Group	Users with this permission can add additional users and assign them appropriate permissions to the profile.
Remove User/Group	Users with this permission can remove users from the profile's permissions.

Avoiding Duplicates

Professional profiles are identified by name, so if you are checking to see if a person has a profile, you can search by all or part of their name to find their profile.

If you are not able to find a person's profile, you may be tempted to create one for them. However, depending on your institutional settings, you may or may not be able to see all the profiles in the system, so their profile might already exist, but not be visible to you.

To address this, Cayuse 424 checks for potential conflicts when you enter a name to create a new professional profile. If the name chosen for a new profile closely resembles the name of an existing profile, Cayuse 424 displays a warning that there is already a profile with a similar name.

If this is the person you are looking for, you should contact your administrator to request access to the existing profile.

You should always treat this warning seriously. Creating duplicate profiles for a single individual can lead to confusion, the retention of   incorrect information, and issues with accessing proposals and profiles.

In some cases, two different people may have similar names, which would be a legitimate reason to proceed with creating a profile with a   duplicate name. Most commonly, this action requires an Admin to complete, but in some cases, any user may be able to override the warning.   If you can override this warning, the dialog will show a **Create Anyway** button.

If the person shown is not the person you are trying to create a profile for, you can click **Create Anyway** and proceed with

creating the new profile. If you don't see this button, you will need to contact your administrator and ask them to create the profile for you.

Deleting Profiles

If you see a [icon] icon next to the name when viewing or editing a Professional Profile, then you can delete the profile by clicking on the icon.

If the Profile is still linked to a user account, then you will see the following warning. This is a sign that the Profile may still be in use. You should only proceed if you have verified that this Profile is incorrect and should not be in use.
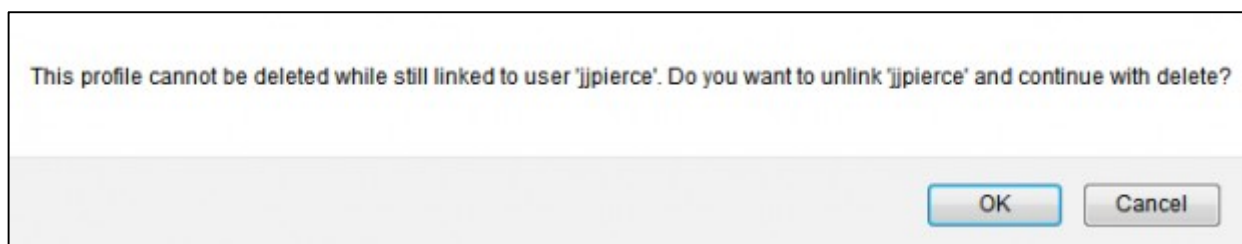
If a profile is linked to the wrong user account, the linkage can be changed by a System Administrator.

When a profile is deleted, it is not immediately purged from the system. The System Administrator user can restore a deleted profile if you have made a mistake in deletion.

Profiles should not be deleted simply because they contain incorrect information. The information can be edited and updated. The profile can even be renamed if needed.

Institutions

Institutions in Cayuse 424 hold institutional information relevant to proposals much in the way that professional profiles hold personal information relevant to proposals. This includes the institution's name, address, DUNS, EIN, and other identifying information.

Each Cayuse 424 application has at least one institutional profile, the home institution of the organization. Some organizations also create Institutional Profiles for personnel who are not affiliated with the home institution and for subaward organizations. For most organizations, the local Administrators create and manage the Institutional Profiles, but users are able to see them and autofill their data in proposals.

When you view the Institutions tab, you can see and search for the available institutions.
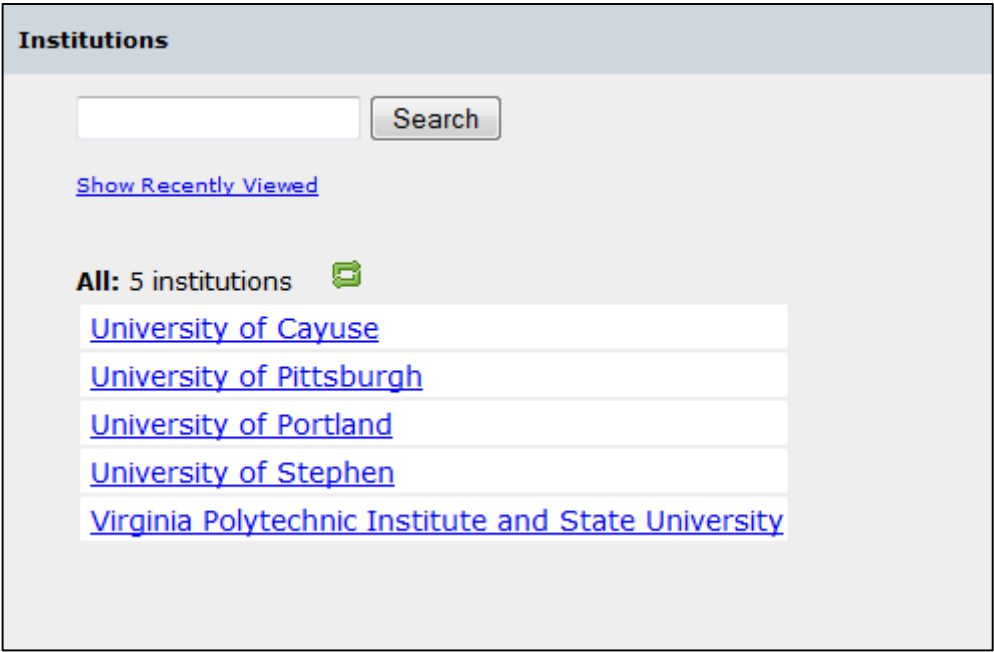
As in other areas, you can show all the institutions or just those recently viewed, or search for the one you want.

Note on Institution Search: When searching for an institution, you can enter character strings from any part of the institution's name, in any order of their occurrence. Entering additional search parameters (separated by spaces) will narrow down the results.

For example, searching for "hampton city" would return "City College of Binghampton" but not "Hampton University".

After clicking on the name of an institution, you'll see the data, but won't be able to edit it.

You can check the information to make sure it's correct. Click one of the links on the left to see the different kinds of information.

When you are creating a proposal or creating a subaward, you can select existing institutions that are available for autofill in the **Organization** field. The proposal will be affiliated with this institution, and its data will be autofilled into the proposal. That includes the contact information, escalation rates, and available indirect cost rates, among other information.

If you're having trouble with indirect cost types not showing in your subaward, see our FAQ on this topic.

Some of the information in institutional profiles is primarily used when creating an institutional association in a professional profile. After you select an affiliation for the profile, you can select from its Organizational Units to assign a department and division and its assigned fringe rates to establish a fringe rate for the profile.

If the institution you need is not listed here and you don't see the ➕ Institution button to the right in the gray bar, you do not have permission to create the institution yourself. Contact a local administrator to create the institution for you.

If you do see this button, or if your local administrator creates the profile but then allows you to add information to it, see Setting Up Institutional Profiles for more information on filling out an institutional profile correctly.

Multi-Project Proposals

With the release of Cayuse 424 v6.0, Cayuse 424 begins support for multi-project (complex) proposals. Within Cayuse 424, Multi-Project Components are treated like individual proposals. On Multi-Project Opportunities, these components can be linked together to an 'Overall' component on a Components Attachment Page. The entire proposal can then be submitted to Grants.gov through Cayuse 424.

When beginning work with a Multi-Project Opportunity, Opportunity Information may be the first place to visit. Creating a Multi-Project Proposal may also be a useful place to start. Once you've created the Proposal, being able to navigate the new fields will be key.

Within a Multi-Project Proposal, you can Create and Link New Components as necessary. You'll also be able to Link Existing Components, Import Components from Other Cayuse 424 Institutions, and Export Components for use by other Cayuse 424 Customers.

In Cayuse 424, each component can be treated as a separate Proposal, even when they are linked to an Overall Component. This means:

- Each component can have its own routing chain, however, currently the individual components do not have to complete routing to be submittable. Only the Overall component must have routing completed. To learn more about Routing in Cayuse 424, see our Routing page.
- Permissions flow down to each individual component. If you have access to the Overall Proposal, you will have access to all linked Components and any subawards linked to them. You can also grant access to specific components as necessary. To learn more about Permissions in Cayuse 424, see our Permissions page.
- Individual components can be edited simultaneously, even if another linked component has been locked by a different user. For example, the Overall component can be edited by one user while another user is editing another linked component. To learn more about Opening and Locking Proposals, see our Opening a Proposal page.
- Multi-Project Proposals have to be Copied/Transformed one component at a time. Selecting Copy/Transform on the Overall Component **will not** Copy/Transform the entire Proposal, just the Overall Component. To learn more about the Copy/Transform process, see our Copying and Transforming page.

Multi-Project Opportunity Information

When looking at the Opportunity Information pertaining to a Multi-Project (Complex) Grant, most of the information will be identical to other [Opportunity Information](#) found within Cayuse 424. However, you will notice that the bottom section is now titled 'Components' and contains additional information.

In this section, you will see a list of each component associated to this Opportunity. Beside it, there will be information on whether it is supported, and whether it is mandatory.

Moving your mouse cursor above the component's name will provide additional information about the forms that are included with the associated component.

This information can be useful in determining what information you may need prior to starting work on a Multi-Project Proposal.

Creating a Multi-Project Proposal

You can find multi-project opportunities in the Opportunities list. Multi-Project Opportunities have children in the Opportunities list, unlike other opportunities.

Creating a Multi-Project (Complex) Proposal in Cayuse 424 is very similar to creating any other Proposal in Cayuse 424. The only difference is the selection of a 'Component Type' during creation.


The 'Overall' component represents a Proposal that other components can be linked to. It is generally used to summarize the rest of the MP application and identifies the PD/PI and the applicant Organization for the entire MP proposal. The other components will be created as separate proposals that can be linked to an Overall component at any time. These components can also be exported and sent to other Cayuse 424 customers.

Navigating a Multi-Project Proposal

Navigating a Multi-Project (Complex) Proposal is much like navigating any other Proposal in Cayuse 424. On the Proposals List, you'll be able to expand or collapse Multi-Project Proposals by clicking the + or - button beside the Proposal, respectively. If you have a subaward attached to one of your components, you will also be able to expand that in the same fashion.
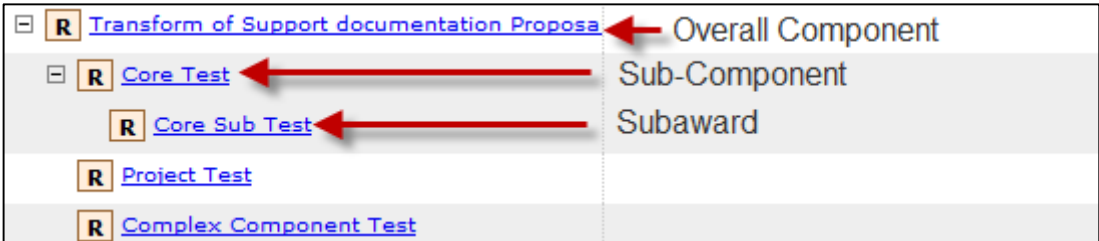
When you enter an Overall component, you will notice that there is a new section on the left side of the screen entitled 'Multi-Project Components'.
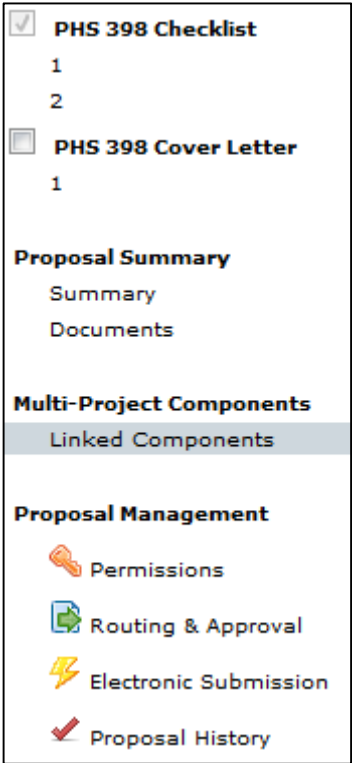
Selecting 'Linked Components' will take you to a new page where you can Create New Components and Link Existing Components. Clicking   on the name of a component will take you into that component. From a component, go back to the Overall Component by selecting **Overall   Component** in the breadcrumb trail at the top left.
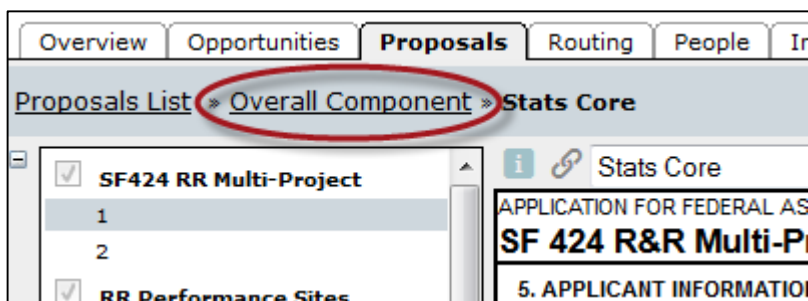
You may notice that some forms appear abridged and/or uneditable on subcomponents. In accordance with Multi-Project guidelines, some sections may only be editable on the 'Overall' section, and some may only be editable on specific Components. Be sure to look closely at the guidelines provided by the Agency.

On the 'Linked Components' page, you will see some information about each component you have associated to your Multi-Project Proposal. This includes the associated Lead Principal Investigator, as well some budget information from the individual component. At the bottom of the table, you will see Overall totals for all of the components.

Hovering the mouse over the borders of each individual header will allow you to expand or collapse the section as you see fit.

Interacting with Linked Components

On the 'Linked Components' screen, clicking the ⇄ icon at the top left will refresh the components and their associated information.

Clicking the ⊞ or ⊟ beside each section will expand or collapse the individual components within that section. If you have two or more components in one section, you will see arrows appear beside each component. These arrows can be used to change the order of the components in any particular section.

Finally, each component will have an associated ![icon] icon. Clicking this button will prompt you to unlink the associated component. However, this does not delete the component. It will still appear as an unlinked component on the Proposal List. You can easily relink it by pressing the **Link a Component** button.

Opening the linked components is the same as opening a proposal from the proposal tab. You can open the component in Read-Only mode, and if another user is working on the component, it will show as 'locked.' The lock icon to show a locked component is to the right of the unlink button. Hovering over the lock icon will show you who has locked the component.

You can also print the entire proposal by clicking the print icon in the proposal management toolbar at the top of the proposal.

This will launch the print dialog, which has a number of options for printing. Select "Include All Components and Subawards" along with all   other forms on the dialog to print all components of your multi-project proposal.
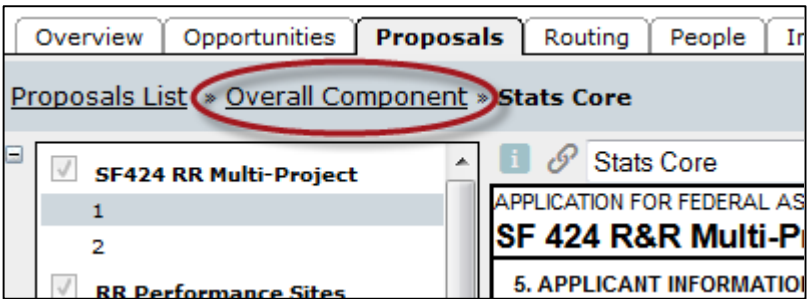
Creating New Linked Components

When working in a Multi-Project (Complex) Proposal, you can Create and Link Components on the Linked Components screen. To do so, select **Create and Link New Component.**

Clicking that button will cause a **Create Proposal** window to appear. In this window, you'll need to set the Component Type, in addition to standard information you would input when setting up any other proposal.


When finished, click **Create Proposal** and you will be taken into the now linked component. To head back to the Overall component, click **Overall Component** in the breadcrumb trail at the top left of the screen.

Linking an Existing Component

In addition to [Creating and Linking New Components](#), you can also Link an Existing Component in a Multi-Project (Complex) Proposal. To link a previously created component, just click the **Link a Component** button.
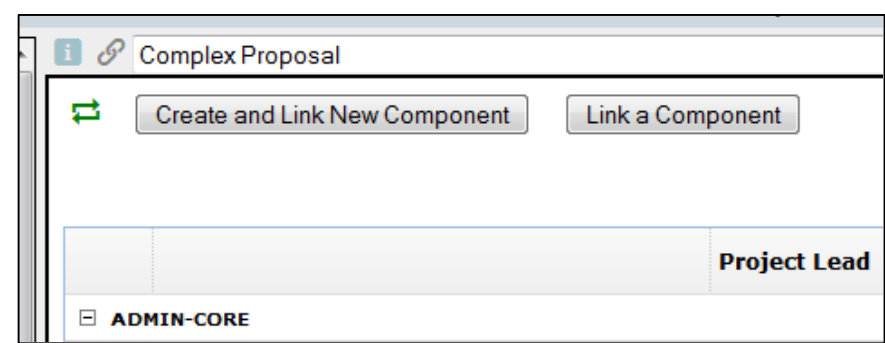
A prompt will then appear listing all of the Proposals and Components that can be linked to this Multi-Project Proposal. Note that the Link a Component button will only present you with a list of components that are eligible to be linked to the Overall component you are working in. The list will not show you components derived from other opportunities or components already linked to this Overall.

Upon selecting the desired Proposal, you'll be taken back to the Linked Components page, where the selected Component will now be listed.

To link a component, you need to have write access to the component. If you don't have access to the necessary component, you'll encounter a message like the one below.

Transforming Existing Components

Components, even if they are unlinked and have the same name and even form set, are not portable across Multi-Project (Complex) opportunities. This is the reason the list of linkable components offered by the **Link a Component** dialog only offers standalone components derived from the same opportunity that is being worked on.

However, the Cayuse 424 copy/transform capability is particularly useful for dealing with this limitation. The transform function can change:

- Component A into Component B within an opportunity
- Component A into Component B across opportunities
- Component into Proposal

Cayuse 424 users can even transform a regular proposal based on an R01 opportunity into a specific component type and then link it to their Multi-Project proposal.

Importing and Exporting Multi-Project Components

When working with Multi-Project (Complex) Proposals in Cayuse 424, you'll have the ability to Import Components from other institutions, in addition to Exporting Components for other Cayuse 424 customers.

Importing a Component

On the Proposals List, select the **Import** button at the top right of the screen.
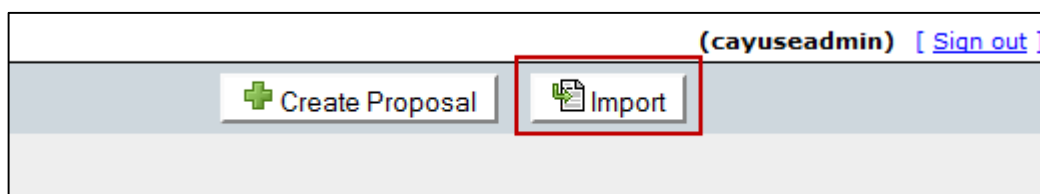
You'll then see the Import Proposal window, which will prompt you to find the file you wish to import, and name the Proposal you are importing.


Upon clicking **Import**, the file will imported into Cayuse 424 as an unlinked Component. To link the component to an existing Multi-Project Proposal, you'll want to follow the instructions on the page Linking a Component.

Exporting a Component

From the Proposals List, select an unlinked, individual component.

Click the **Export** option on the left side of the screen. There is also an icon located at the top right of the page.
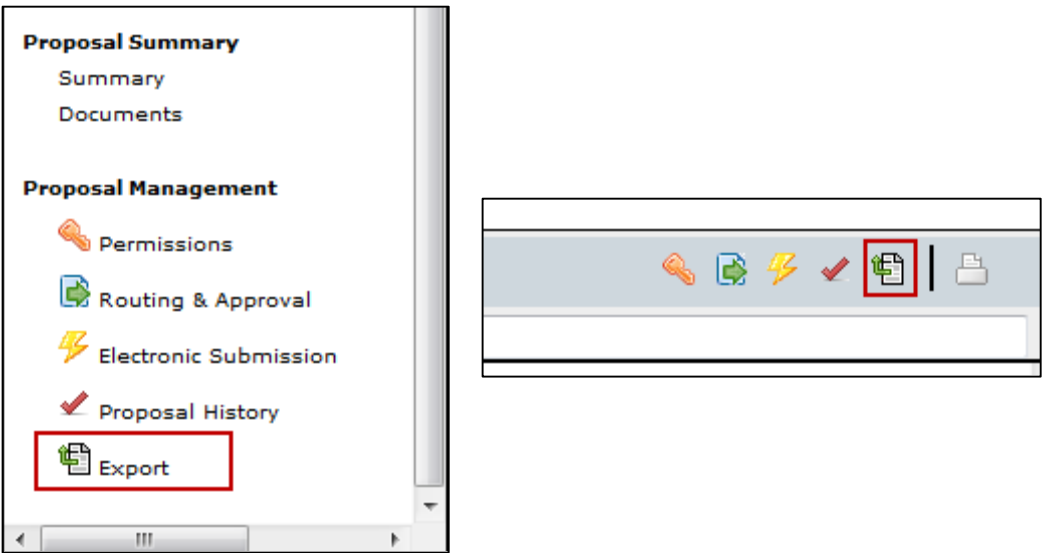
You'll then be given the option to name the component, as well as run a validation check prior to export.

Upon clicking **Export**, you will be prompted to save the file to your computer. You'll then be able to send the file to other customers for import into their Cayuse 424 environment. Attachments and any associated Subawards will be included in the exported file.

Finally, note that this file uses a .cayuse file extension. This file cannot be opened by clicking on it like other computer files. It can only be opened by first importing it into Cayuse 424.

Validation of Multi-Project Proposals

When working in a Multi-Project (Complex) Proposal, Cayuse 424 provides the following validations across all components:
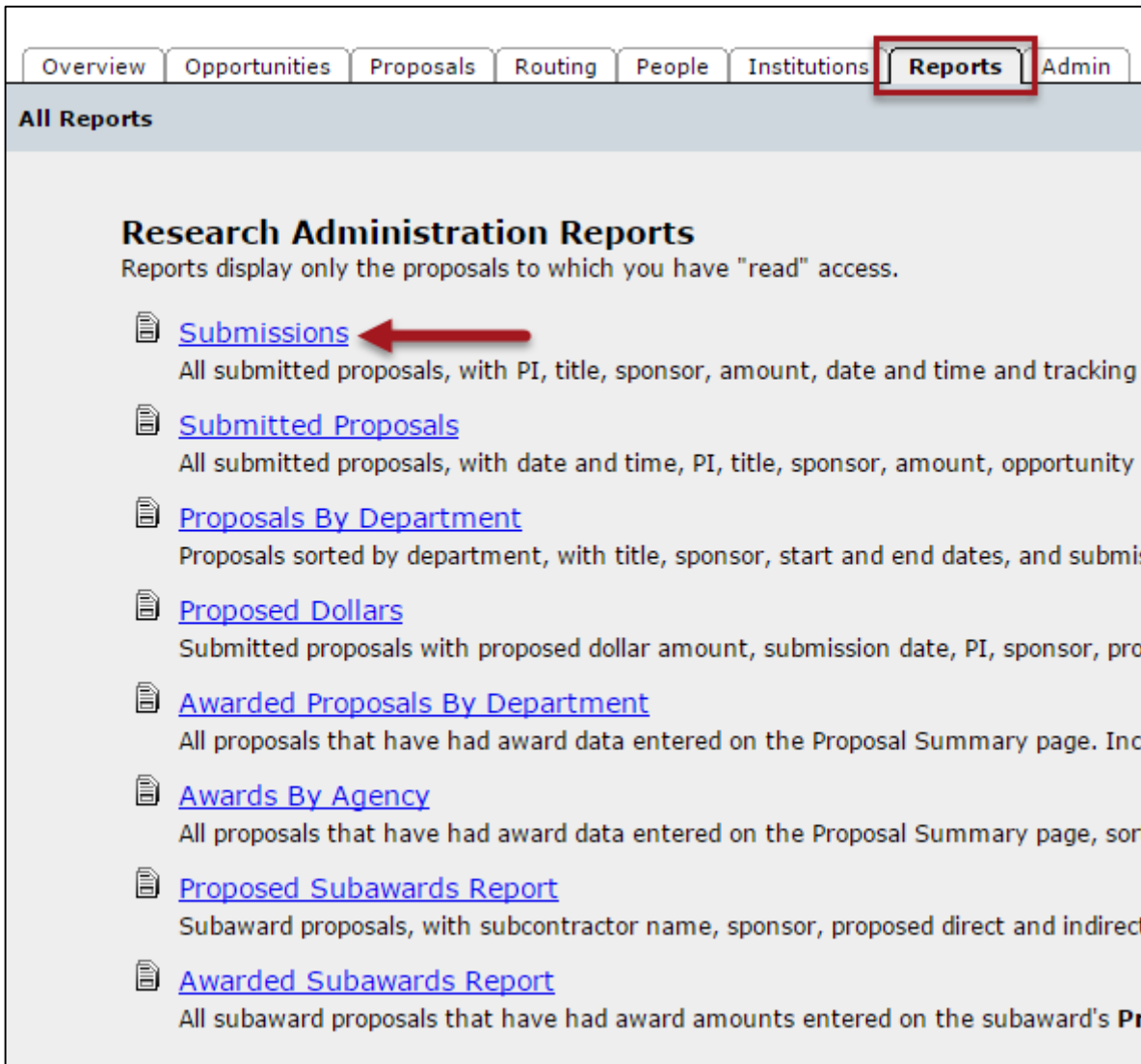
- Human Embryonic Stem Cell lines.
- Check for redundant BioSketches across the entire MP project (1 per eRA Commons credential).
- Check for Human Subjects usage across components. This means that, if any component has checked "Yes" for Human Subjects then OAC must be checked for yes.
- Check for Vertebrate Animal usage across components.
- Check for Foreign Activities across components.
- Check for consistent budget start dates, end dates and number of budget periods.

Delete this text and replace it with your own content.

Reporting

Cayuse 424 offers eight reporting tools to track submitted proposals, proposed dollars, awarded proposals and subawards. The **Submissions** link will display a broad overview of all the submitted proposals you currently have access to. This list can be quickly filtered using three techniques.

- **Submitter**
- **Date Submitted**
- **Section Heading**

Additional reports can only be viewed in either PDF of CSV form using the **Generate Report** button. The same filtration and sorting mechanisms of date, title, PI name, and amount still can be selected either using the **Calendar Icons** or the **Sort By** drop down.

Glossary

A _____

AOR

An AOR is an Authorized Organizational Representative. They either submit the proposal themselves or authorize someone else to do it.

B _____

Breadcrumb

A breadcrumb is a horizontal chain of links providing the user with context and possibly navigation to any of the links in the chain. These terms are frequently used throughout the manual.

C _____

Calculation field

A calculation field derives its information from one or more other fields. Calculated fields are automatically computed while you are filling in the form. These fields are recalculated each time you enter data into a related or linked field. Many of the calculated fields permit you

to overwrite their calculated entries. In those fields where overwriting is permitted, a red asterisk will appear next to the field indicating that you have over-written it. If you overwrite a calculated field, the information in that field will not be updated when you change the information in other, related fields. This can cause your final values to be wrong! Use caution when overwriting calculated fields!

Checkbox field

A checkbox field operates like an On-Off switch. When "On", it appears as a box with an X in it; when "Off", it appears empty. To mark a checkbox, click it with your mouse. You cannot move into it by using the Tab key. Some checkboxes are also radio buttons.

Currency field

A currency field allows you to enter only numbers. To display $10.00, you would enter a value of 10. To display $10.99, you would enter 10.99.

F _____

Field

A field is a blank space or area on a form where you may enter information or data. Each field on a Cayuse 424 form has been designed to accept certain types of data, and to handle those data in a specific way.

Forms

Most of us associate a form with a printed document with blank spaces to be filled in, such as an application for employment. A Cayuse 424 electronic form is essentially the same, except that before it is filled-in, the form starts out on a computer screen rather than on paper.

G

General Field

General Fields accept any type of data: letters, numbers, special characters, punctuation, or a mixture thereof.

I

Institution

An institution has an entry in the Institutional profile database which includes enough information to allow submission of proposals by   that institution. This information can be auto-filled into proposals. If you are submitting proposals with multiple budgets, you may need   multiple institutional profiles.

L

Listbox

A listbox is a text box containing a list of selectable items.

P

Percentage

A percentage field allows you to enter only numbers. Percentages must be typed using this format: XY.Z%.

Personnel

Cayuse 424 contains a professional profile database which includes enough information to add a person to a proposal. This information   can be auto-filled into proposals.

Pre-Award Admin

Pre-Award Admin is a Cayuse 424 role usually held by staff in the central Research office. These users have additional privileges in the sys   tem. The exact privileges may differ among institutions.

R

Radio Buttons

Radio buttons are groups of two or more mutually exclusive checkboxes. Selecting one option automatically deselects all other options in   the group. For example, Item 2 of the PHS 398 has Yes and No radio buttons. To select an option from a group of radio buttons, click it   with your mouse.

U

User

A Cayuse 424 user has a Cayuse 424 login and password. A user can create and modify proposals. A user may also have a record in the   Cayuse 424 Professional Profile database.