School of Medicine Cayuse SP Guidelines

Please review the instructions on this page prior to submitting your proposal for School of Medicine approval. Use Mozilla Firefox to access Cayuse SP. If the link yields an error, copy and paste https://ucdavis.cayuse424.com into Mozilla Firefox and login with your Kerberos ID and Password.

Below are some key points to consider when using Cayuse SP:

1. **Before entering your proposal,** confirm the PI's information in their Cayuse profile. Go to Cayuse 424; https://ucdavis.cayuse424.com/sp/index.cfm. Click on **Cayuse 424** under Research Administration Module. Select the People tab. From the drop-down menu, select **University of California Office of the President**. Type the PI's name in the search field. Click on the PI's name and then on **Contact Info**. Check the information that is entered and make any necessary corrections.

2. **When you enter your proposal, be sure to select the correct Cayuse SP unit name(s)/ codes** to identify the department or unit that is administering the proposal. Use the attached Table as a guide.
   - Grants submitted through **non-admin units (under code z51) will be rejected** and must be re-submitted

3. **If submitting to a Federal agency**, there are additional steps:
   - You must create a Cayuse 424 proposal in addition to your Cayuse SP proposal. However, do **not** pair your Cayuse 424 proposal with your SP proposal
   - Add the proposal analyst and AOR to the Routing and Approval Chain in your 424 proposals
   - In the SP Submission Notes enter "See 424 proposal"

4. **Request for Exception to Policy** on Eligibility to Undertake Sponsored Research/Other Sponsored Activity. Complete Form 105 **(PDF)** https://research.ucdavis.edu/wp-content/uploads/Form-105_2018.pdf obtain the appropriate signatures and upload as a Proposal Attachment in the relevant Cayuse SP Internal Processing Form (IPF). Dept/unit Chair approval will be obtained via IPF approval if the form is uploaded into Cayuse SP *before* submitting the IPF for routing.
   - I. As part of Proposal/Award review:
     - a) Assigned SPO analyst reviews Form 105 for required information and signature(s).
     - b) Assigned SPO analyst sends Form 105 and IPF as a PDF to Ahmad Hakim-Elahi.
     - c) Assigned SPO analyst uploads the form approved by Ahmad Hakim-Elahi as a Proposal Attachment or informs the requestor via email that the exception was not approved.

   Do Not upload PI Exception Form 105 **(PDF**) https://research.ucdavis.edu/wp-content/uploads/Form-105_2018.pdf after the proposal is routed for approval because the School of Medicine signatures will not be captured. Instead, the form should be completed with the Principal Investigator, Faculty Supervisor, Chair and the School of Medicine Dean's signature. Email the form to **somor@ucdavis.edu** for the School of Medicine Dean's signature after which the form will be emailed back to the sender and cc'd to Sponsored Programs **proposals@ucdavis.edu.**

5. **Allocation of Credit**: "Allocation of credit" is determined by the lead principal investigator to demonstrate the contribution of the lead principal investigator and co-investigators for a specific project. This data will be used for *ad hoc* reports from campus leadership regarding investigator productivity and contribution to campus research. These reports are often requested in the context such as retention, space allocation and invitations for panel discussion participation, etc. "Allocation of credit" must equal 100% across all Key Personnel on the Investigators/Research Team tab. If "allocation of credit" is not entered on the IPF received, Sponsored Programs will allocate the credit equally across the lead principal investigator and co-investigators.

6. **For approval routing order**, ensure **School of Medicine (Use 049000)** is the last unit listed prior to SPO in the Authorizing Units tab (the list can be manually re-ordered).

7. **Advance Account Requests** will be submitted and authorized through Cayuse SP. Detailed instructions are pending and will be linked here once they are available.

8. **For Clinical Trials that go to Health Systems Contracts**, please follow the updated Clinical Trials (CT) Workflow for all

   industry-funded clinical trial contracts.

   Please keep the following in mind when submitting to the **UC Davis Health Clinical Trials Contracts Office**:
   - All Confidential Disclosure Agreements (CDA's) should be submitted directly to the Clinical Trials Contracts office analyst (Lorie Dilts) via email with an editable agreement and e-mail chain that identifies the external contact for negotiation.
   - Review the Handbook for Department Industry-Funded Clinical Trial Staff, Principal Investigators and Approvers ("Handbook") for step-by-step instructions on how to submit through Cayuse SP (https://spark.ucdavis.edu/wp-content/uploads/Cayuse-End-users_CT-Specific.pdf).
   - You will still need to secure a signature from your Department Chair on the Unified Budget Templates (UBT). After the UBT has been signed by the Department Chair, you will submit the UBT to the Clinical Trials Contracts budget analyst (Julie Calahan), who will review and upload into Cayuse SP.
   - Review the attached business process workflow to determine the responsibilities of the department. This workflow is also included in the Handbook.
   - All Conflict of Interest (COI) disclosures on the 700U and Form 800 (https://research.ucdavis.edu/wp-content/uploads/Form-800-No-PHS-rev-07-24-20131.pdf) will be required to be submitted through the eCOI online disclosure: https://or-forms.ucdavis.edu/. Please contact the Research Compliance and Integrity team directly with any questions on this process.

9. Forms requiring School of Medicine Dean's signature (Special Individual Agreements, Royalty Sharing, Informed Participation, etc.) should be emailed to somor@ucdavis.edu.

Overview/ additional valuable information:
   - Click here for extramural grant support information

Visit the Cayuse SP quick start guide and Cayuse Handbook.

   - for an overview of the process and step-by-step instructions.
   - Visit the Spark page for additional information and training material

-Contact the School of Medicine Office of Research (somor@ucdavis.edu, 916-703-9141) with any questions for **School of Medicine procedure clarification** or any other questions.
-Contact the Cayuse Rapid Response Team (ORCayuseHelp@ucdavis.edu) with any questions for **Cayuse SP and/ or 424 assistance** and cc SOMOR@ucdavis.edu.

Table 1: Cayuse SP names and code(s) corresponding to departments and units

Department name	Cayuse SP name/ code
Anesthesiology and Pain Medicine	Med: Anesthesiology (049158)
Biochemistry and Molecular Medicine	Med: Biochem and Molecular Medicine (049044)
Cell Biology and Human Anatomy	Med: Cell Bio and Human Anatomy(049046)
Dermatology	Med: Dermatology (049112)
Emergency Medicine	Med: Emergency Medicine (049011)
Family and Community Medicine	Med: Family and Community Medicine (049034)
Internal Medicine	Med: Int Med (20)
Internal Medicine - Cardiovascular Medicine	Med: Int Med- Cardiovascular (049205)
Internal Medicine - General Medicine Education	Med: Int Med- GM Education (049225)
Internal Medicine- Administration	Med: Int Med- Administration (049201)
Internal Medicine- Endocrinology, Diabetes and Metabolism	Med: Int Med- Endocrinology (049217)
Internal Medicine- Gastroenterology and Hepatology	Med: Int Med- Gastroenterology (049221)
Internal Medicine- General Medicine, Geriatrics, and Bioethics	Med: Int Med- Genl Medicine (049223)
Internal Medicine- Hematology and Oncology	Med: Int Med- Hematology and Oncology (049227)
Internal Medicine- Hospitalist Program	Med: Int Med- Hospitalist (049233)
Internal Medicine- Infectious Disease	Med: Int Med- Infectious Disease (049231)
Internal Medicine- Nephrology	Med: Int Med- Nephrology (049235)
Internal Medicine- Pulmonary, Critical Care and Sleep Medicine	Med: Int Med- Pulmonary Med (049203)
Internal Medicine- Rheumatology, Allergy and Clinical Immunology	Med: Int Med- Rheumatology (049240)
Internal Medicine- Rheumatology, Allergy and Clinical Immunology	Med: Int Med- Allergy (049239)
Medical Microbiology and Immunology	Med: Medical Microbiology and Imm (049150)
Neurological Surgery	Med: Neurological Surgery (049062)
Neurology	Med: Neurology (049016)
Obstetrics and Gynecology (OBGYN)	Med: Obstetrics and Gynecology (049064)
Office of Research	Med: VC Deans Office (049000)
Ophthalmology and Vision Science	Med: Ophthalmology (049066)
Orthopaedic Surgery	Med: Orthopaedic Surgery (049068)
Otolaryngology	Med: Otolaryngology (049070)
Pathology and Laboratory Medicine	Med: Pathology (049152)
Pediatrics	Med: General Pediatrics (049118)
Pharmacology	Med: Pharmacology (049054)
Physical Medicine and Rehabilitation	Med: Phys Med and Rehab (049020)
Physiology and Membrane Biology	Med: Physiology and Membrane Biol (049048)
Psychiatry and Behavioral Science	Med: Psychiatry and Behavioral Science (049038)
Public Health Sciences	Med: Public Health Sciences (049030)
Radiation Oncology	Med: Radiation Oncology (049063)
Radiology	Med: Radiology (049026)
Surgery	Med: Surgery (049060)
Urology	Med: Urology (049074)
Non- department unit name	**Cayuse SP name/ code**
Behavioral Health Center for Excellence	Med: Behavioral Hlth Ctr Excel (049098)
Cancer Center	Med: Cancer Center (049090)
Center for Musculoskeletal Health	Med: Ctr Musculoskeletal Health (049081)
Clinical and Translational Science Center (CTSC)	Med: CTSC (049022)
Institute for Population Health Improvement	Med: Inst Population Hlth Imp (049027)
Institute for Regenerative Cures	Med: Stem Cell Research Program (049025)
MIND Institute	Med: MIND Institute (049007)

This procedure may be modified as edits to Cayuse SP are made. Feedback and suggestions for process changes that can be made outside of software modifications are welcome to be submitted via somor@ucdavis.edu. Version 2.5