CAYUSE SPONSORED PROJECTS USER GUIDE

Reviews & Tasks

April 2026

Office of Sponsored Programs and Research
cayuse@clarku.edu

Sponsored Projects User Guide: Reviews & Tasks

1 Introduction

1.1 Purpose and Use

Cayuse is Clark University's online platform for managing the entire sponsored projects lifecycle. It supports proposal initiation, development, internal routing and approval, submission to sponsors, tracking proposal outcomes, and post-award management of externally funded projects. The Office of Sponsored Projects and Research (OSPR) is the administrator of the system.

This **User Guide** assists Users, primarily **Department Chairs, Center or Institute Directors, Deans, and Ad Hoc Team Members** in reviewing proposals during the Proposal Routing process. This guide is a companion to the SP Proposals User Guide.

The Cayuse routing process is pre-configured based on the Sponsor, the Principal Investigator's Department, the Administrative Unit managing the proposal, and the proposal's specifications as captured in the Proposal Form. The general routing flow is represented in the table below; the process creates system-generated Tasks (called Ad Hoc Review Tasks) that automatically alert Users (via email) to an action that needs to be taken in SP, such as a Review.

Principal Investigator	OSPR or CFR	Department Chair	Center Director	OSPR
Complete & Certify	Initial Review	Academic Department or Clark Office	If applicable, e.g., Marsh Institute	Final Review & Approval
Feedback & Revisions as needed		*Conditional Reviews or Notifications (e.g., Dean of Research, Legal, IRB, IACUC, Space)*		*Submission*

2 Ad Hoc Review Tasks and Notifications

The Clark University ***Proposal Form*** is configured to include all the reviews, notifications, and approvals necessary for submitting a funding proposal to an external funding Sponsor. OSPR is responsible for ensuring that proposals not only comply with the Sponsor guidelines, but also are aligned with Clark's institutional policies and procedures. As such, the form currently addresses questions related to:

Facilities Management	IACUC	Legal Review
Information Technology	IRB-Human Subjects	Space (new or renovation)
	IBC-Safety	

Each of the above areas have designated Ad Hoc Teams that participate in the review process when applicable. In addition to the approval chain within the Principal Investigator's Academic Department or Office, the conditions of the proposal may also require the review (action required) by a Team, or automatically send a notification (for information only) to a Team.

For example, if there is the potential for Intellectual Property generated from the proposed work, the proposal will be routed to the Legal Team for ***review***.   If the proposed project involves human subjects research, a ***notification*** will be sent to the IRB-Human Subjects Team.

System-generated reviews require an Ad Hoc Team Member to **review and approve** the proposal record before it can be submitted. A system-generated notification only **notifies** the Ad Hoc Team of the proposed work and does not required action at the proposal stage.

3 Completing an Assigned Review Task

There are multiple ways of accessing an assigned review task: via a notification email link, the My Task slideout tab, and the Cayuse Home page (My Tasks).

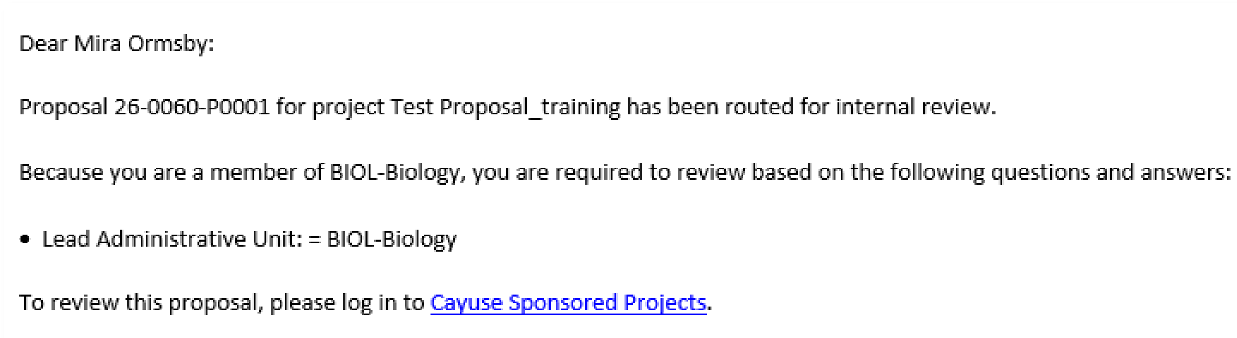
3.1 Review Task Notification email

Each User in the routing chain will automatically receive a system-generated Ad Hoc task email from Cayuse indicating when a task for review has been assigned and is ready for completion.

NOTE*: If you are included on a routing chain, ADD this email address to your contacts to ensure emails are received:* ***do-not-reply@cayuse.com****. Otherwise, the notification email may end up in your Junk Folder.*

Notification emails include the following details:

- Proposal #
- Project Name
- Explanation of the required task, e.g., review
- Direct link that takes you to the proposal requiring review


Dear Mira Ormsby:

Proposal 26-0060-P0001 for project Test Proposal_training has been routed for internal review.

Because you are a member of BIOL-Biology, you are required to review based on the following questions and answers:

- Lead Administrative Unit: = BIOL-Biology

To review this proposal, please log in to [Cayuse Sponsored Projects].

3.1.1 Completing Task from Email Notifications

Click the link in the notification email to be automatically directed to the Proposal Form requiring review.

Each Proposal Section will display a red number icon which indicates that section has yet to be reviewed. Once each section has been reviewed, the icon displays a green checkmark.

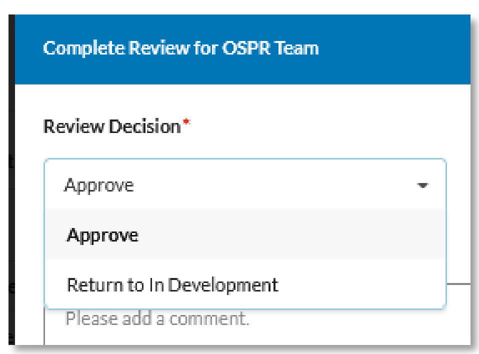
The Reviewer proceeds through each section to confirm the information proposed and review the details pertinent to the Reviewer's role. The Reviewer can access all of the uploaded proposal documents.

Once each section has been reviewed, the Reviewer clicks the

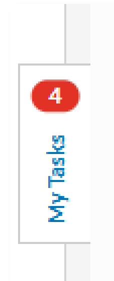
button under My Actions.

A pop-up window will appear with options of the Review Decision: **Approve** or **Return to In Development**. The User can also add a comment. If "*Return to In Development*" is selected, a comment is required.

Your Review Task is now completed and the routing chain will continue accordingly. ***NOTE:*** if returned to *In Development*, the routing process will start over from the beginning (i.e., at the PI-level).

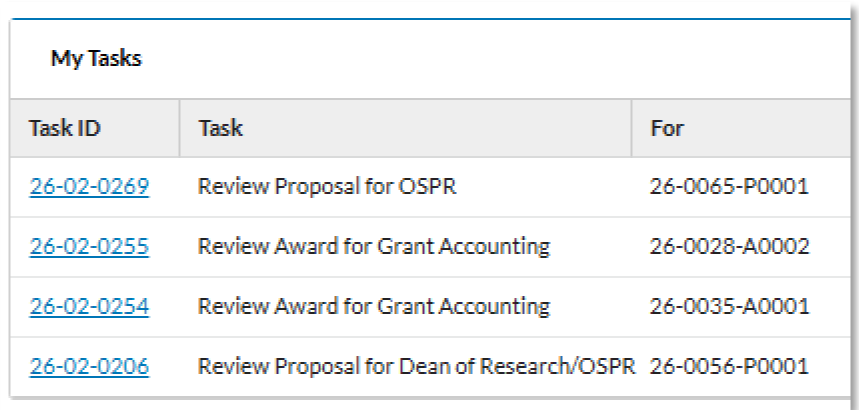


3.2 Completing Review from the My Tasks Slideout



Log into Cayuse and from the Cayuse platform landing page, navigate to Sponsored Projects under the Products. If you have Tasks pending action, they will appear as red number icon at the bottom right of your screen. Click the tab and a list of tasks will appear in the right margin of the page.

Each Task has a direct link to the Proposal Form that requires review. Click the Task ID link and proceed with the Review as described in Completing Task from Email Notifications.

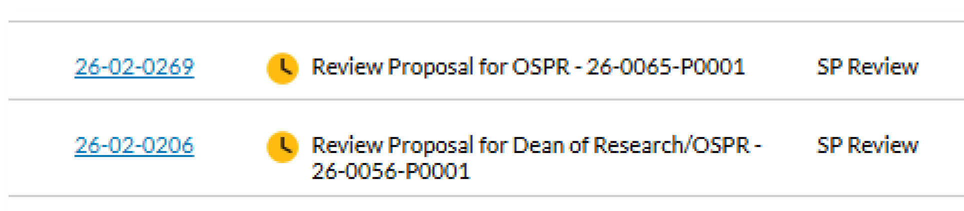


My Tasks

Task ID	Task	For
26-02-0269	Review Proposal for OSPR	26-0065-P0001
26-02-0255	Review Award for Grant Accounting	26-0028-A0002
26-02-0254	Review Award for Grant Accounting	26-0035-A0001
26-02-0206	Review Proposal for Dean of Research/OSPR	26-0056-P0001

3.3 Completing Review from the My Tasks List

When you first login into Cayuse, you see your My Tasks list on the landing page (Home). On this page, ALL of your platform-connected application tasks will appear in this list. The various types of tasks that you see will depend on your Role and Permissions in Cayuse. In addition to the system-generated tasks (such as **Reviews** and PI **Certifications**), other potential types include SP Milestone, SP Ad Hoc, Admin Ad Hoc, Admin Milestone (Admin tasks are only applicable to OSPR and CFR staff). See Milestones and Tasks in SP

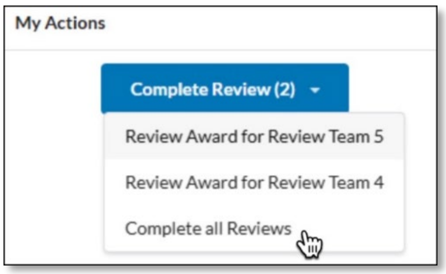


26-02-0269	Review Proposal for OSPR - 26-0065-P0001	SP Review
26-02-0206	Review Proposal for Dean of Research/OSPR - 26-0056-P0001	SP Review

Each Task has a direct link to the Proposal Form that requires review. Click the Task ID link and proceed with the Review as described in Completing Task from Email Notifications.

3.4 Completing Multiple Simultaneous Reviews

In the event that there are multiple active reviews for a single Proposal record, upon viewing the record, the Complete Review button will be changed to a dropdown. When opening the dropdown menu, all available review options will be displayed along with an option to complete all reviews.



If one of the review options is selected, then the workflow proceeds as defined in the sections above.

If the Complete All Reviews option is selected, the modal to add a review decision will be displayed, but the decision and comment will be applied to all applicable reviews.

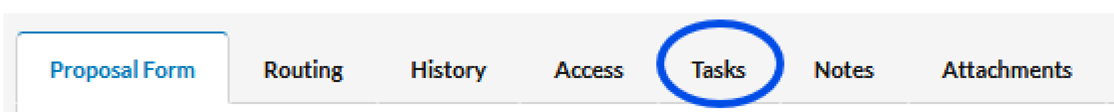
4 Milestones and Tasks in SP

Milestones and Tasks work together to break projects into clear manageable steps making it easier to track progress, set reminders, and stay organized.

- A Milestone represents a high-level, typically longer-term, project with multiple tasks. It includes a progress bar that visually tracks completion based on the progress of associated tasks. A Milestone cannot be closed until all the linked tasks are closed.
- Tasks are generally shorter-term actions and can be linked (in any status) to Milestones. However, they can also exist independently for more immediate required actions. Once a Task is closed, it cannot be reopened.

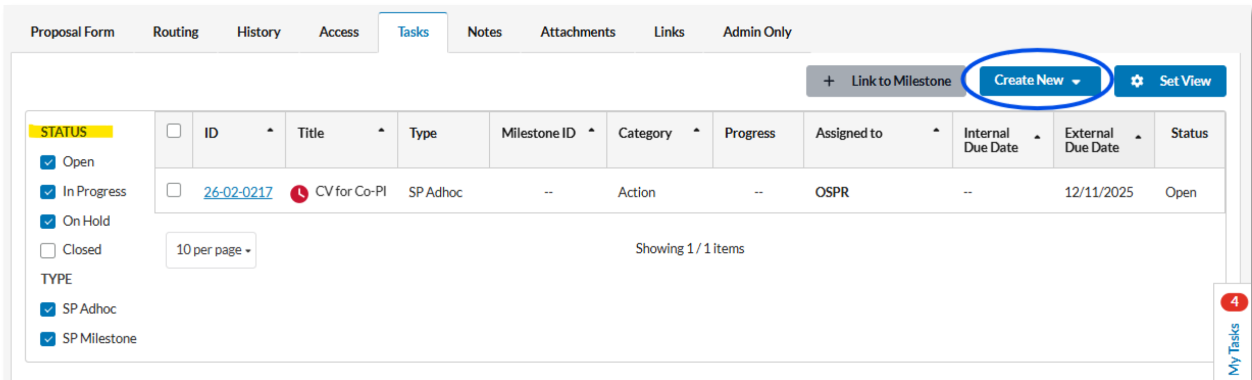
4.1 Proposal or Award Record Tasks

Users can create and assign Ad Hoc Tasks related to specific Proposal or Award records (called *SP Ad Hoc Tasks*). The Task tab is located on the Proposal (Award, Subaward) Form dashboard.



Select the Tasks tab and the dashboard will appear with any *open*, *in progress*, or *on hold* tasks related to the proposal (award, subaward). By default, the dashboard does not show Closed Tasks; if you want to view closed tasks, check the Closed box under *Status* in the left margin.

The User can **Create New** tasks from the Task dashboard and customize which columns to view in the dashboard using the **Set View** feature.



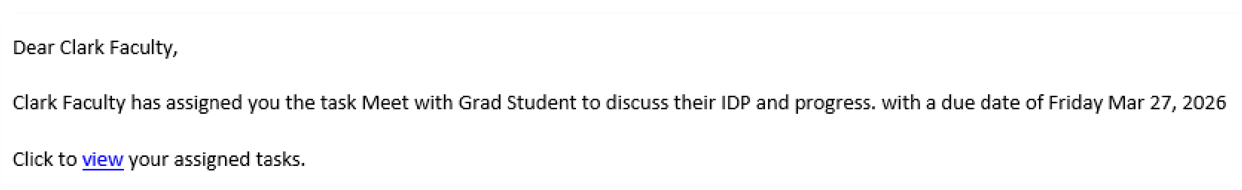
4.1.1 Create New Task

There are minimum required fields for New Tasks (red *) to include:

- Title – short label to identify the Task
- Description – more detailed description of what is needed to complete the Task
    - Users can add optional attachments or comments if desired
- Person or Team Assigned – the User can assign a specific person or a Team
- External Due date

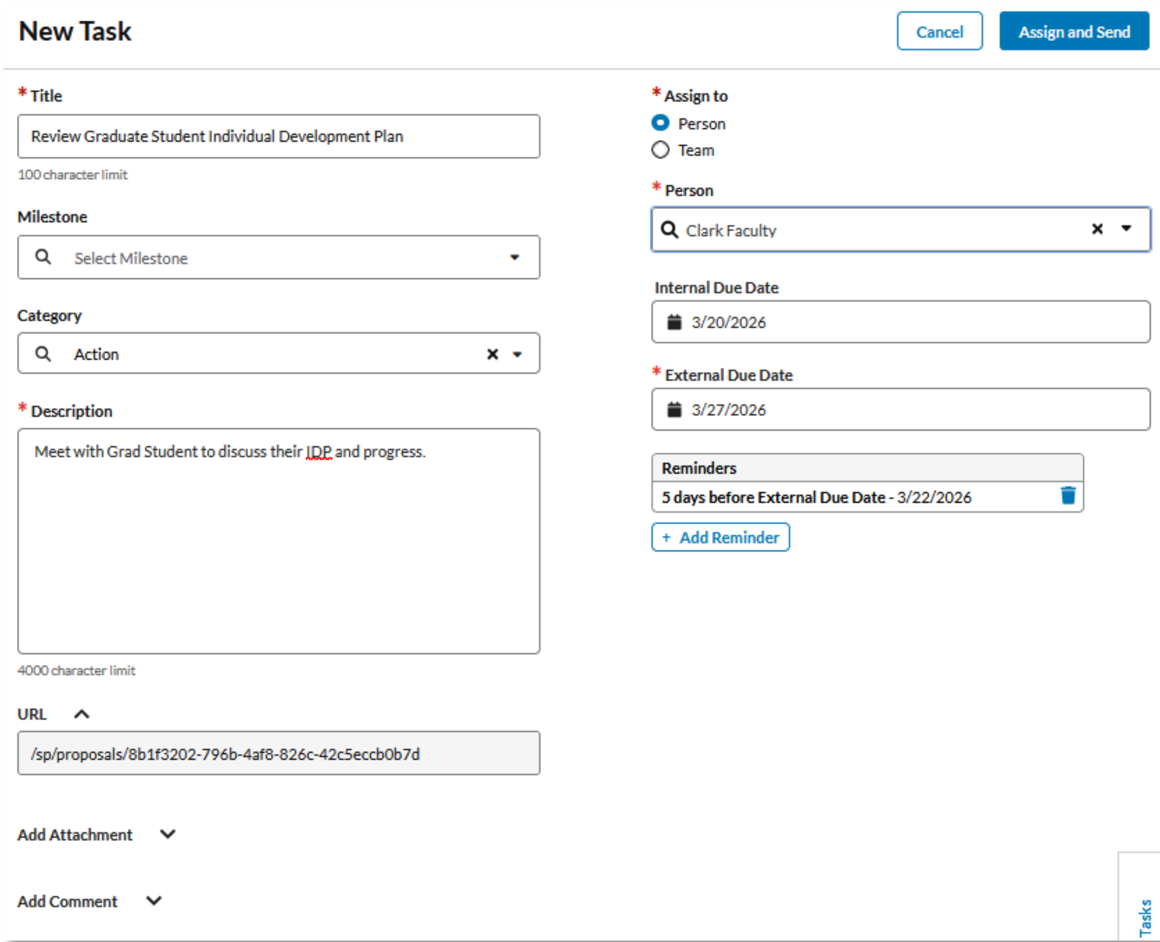
Although not required, it is recommended to select a **Category** for the task from the dropdown list, and add a **Reminder**. A convenient catch-all Category is “*Action.*”

Once the required and optional information is complete, click Assign and Send. The assignee will receive an email notification with a link to view the New Task. The Task will also appear on the assignee’s My Tasks (Home) page.


Dear Clark Faculty,

Clark Faculty has assigned you the task Meet with Grad Student to discuss their IDP and progress. with a due date of Friday Mar 27, 2026

Click to view your assigned tasks.

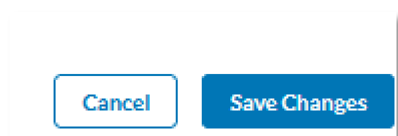


4.1.2 Edit Tasks

The following users are able to edit a Task after it has been created:

- User that created the Task
- Users assigned to Tasks individually or as part of a team
- Users who have admin-level access

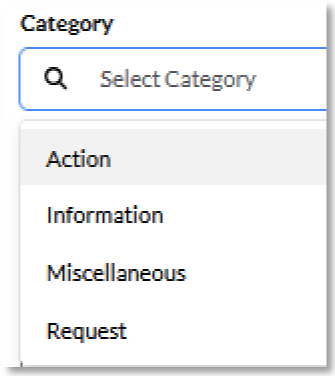
To update a Task, open it and make necessary changes. Once complete, be sure to **Save Changes**.



Users with an admin level access, the task creator, and the assignee can delete all attachments on any ***open Tasks.*** Once a Task is closed, the attachments cannot be deleted by any user.

4.2 Manually-Created Ad Hoc Tasks

From the **My Tasks (Home)** page, the User can create tasks unrelated to a specific proposal or award. Examples may include:



- If a faculty member wants to update an annual training certification, they can create a task requesting that the document be uploaded to their Profile.
- PI can request a meeting to discuss the feasibility of applying to a grant opportunity.
- A User can request additional permissions or role change in Cayuse.

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*Users should create Tasks from the **My Tasks (Home)** page **only** if the task is **unrelated** to a specific proposal or award; otherwise create the task from within the proposal or award form.*

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5 Appendix

5.1 Form Icons

There are three different red and green form icons can change for different reasons as described below:

Icon	Meaning
Green Checkmark	All required fields are populated AND section has been viewed.
Red Exclamation Point	No empty required fields, but section needs to be reviewed.
1 Red Number	Not all required fields are populated. The number signifies how many required fields still need to be answered or populated.