

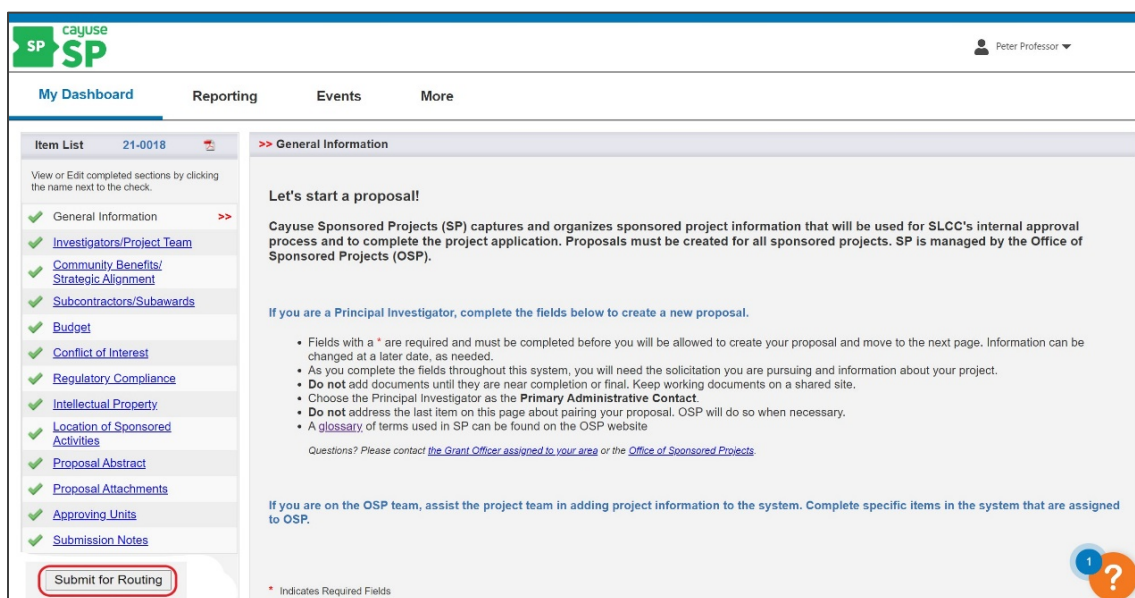
Submit for Routing

Routing a proposal is the initiation of the SLCC internal approval process. At the request or approval of the PI, **OSP initiates** the internal approval process after all components of the Cayuse SP proposal have been completed and reviewed by the PI and OSP for accuracy, including the approving units page. **The PI must NOT initiate routing.**

A proposal record can only be routed when all the sections in the Item List have green checkmarks. This does not apply to the Submission Notes section. The PI should carefully review each section of the proposal. Green checkmarks DO NOT indicate that the section is complete, rather they indicate that information has been entered into all required fields noted with a red asterisk. It is the PI's responsibility to ensure that all the information has been entered accurately and completely prior to notifying their Grant Officer that the proposal is ready for OSP review and routing.

How OSP Submits a Proposal for Routing

1. Your assigned Grant Officer will first review each section of your Cayuse SP proposal. If there are any necessary changes that need to be made, the Grant Officer will notify you.
2. After the Grant Officer has reviewed your Cayuse SP proposal, the Director of OSP will review the Cayuse SP proposal. If there are any necessary changes that need to be made to the proposal, the Grant Officer will notify you.
3. After OSP has completed its review of the proposal in Cayuse SP, the Grant Officer will select the “**Submit for Routing**” button found at the bottom of the Item List.



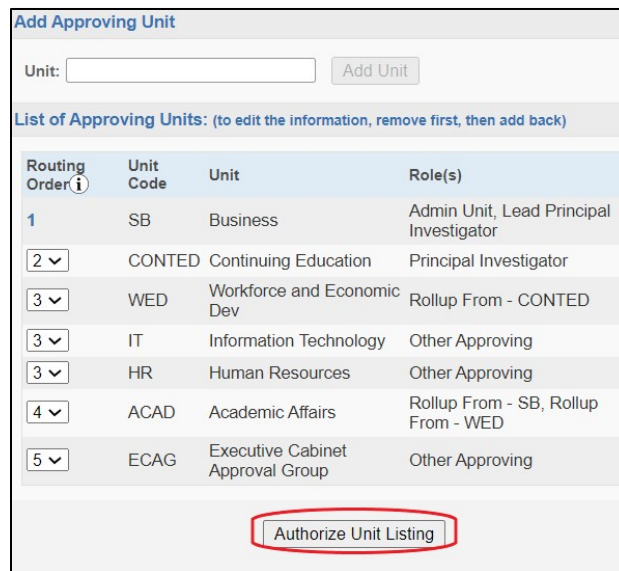
The screenshot displays the Cayuse SP user interface. At the top, there is a navigation bar with 'My Dashboard', 'Reporting', 'Events', and 'More'. Below this, the 'Item List' for proposal 21-0018 is shown, listing various sections with green checkmarks. A red box highlights the 'Submit for Routing' button at the bottom of the Item List. The 'General Information' section on the right provides instructions for starting a proposal, including a list of required fields and a note about the Primary Administrative Contact.

If you need to make changes to the proposal after OSP has submitted it for routing, you can ask your Grant Officer to have the proposal changed back to the Unsubmitted status, or you can ask the first unit approver to reject it, which will reopen the proposal. Reopened is similar to Unsubmitted in that you will be able to edit the proposal while it is Reopened.

Once OSP submits the proposal for routing, the PI will receive an email indicating that they need to certify the proposal. See the *Cayuse SP – User Guide: Certifications and Approvals* for instructions on PI Certifications and Internal (Unit) Approvals.

Instructions to Initiate and Complete Internal Approval

1. Once the approving unit list is complete, OSP will click the “Authorize Unit Listing” button at the bottom of the page.



The screenshot shows a web interface titled "Add Approving Unit". At the top, there is a text input field labeled "Unit:" followed by an "Add Unit" button. Below this is a section titled "List of Approving Units: (to edit the information, remove first, then add back)". This section contains a table with the following data:

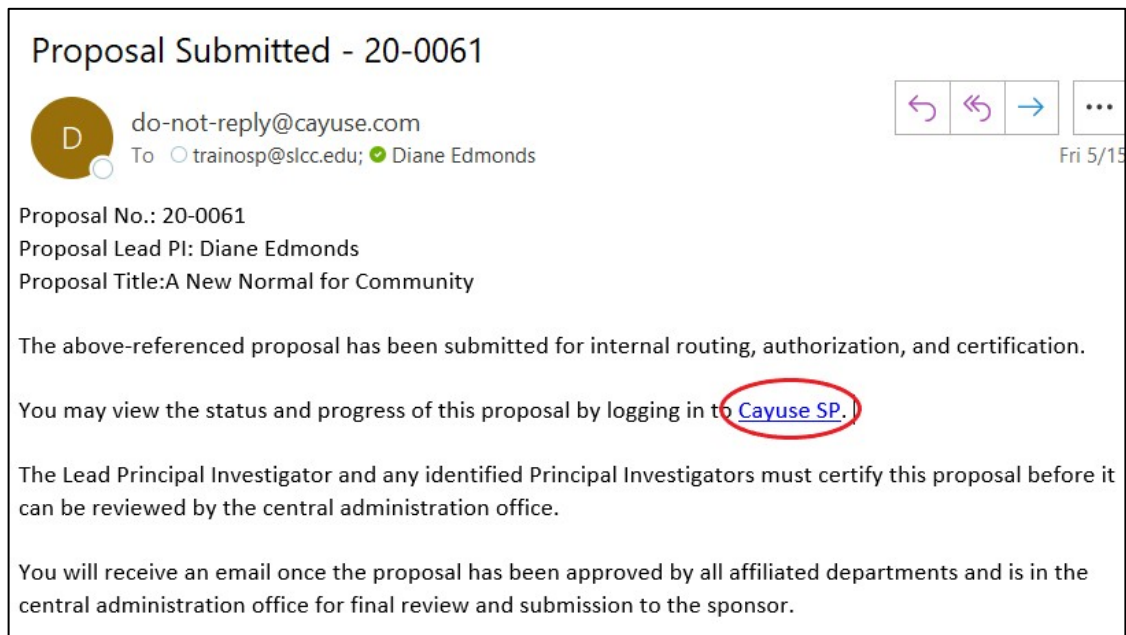
Routing Order	Unit Code	Unit	Role(s)
1	SB	Business	Admin Unit, Lead Principal Investigator
2	CONTEd	Continuing Education	Principal Investigator
3	WED	Workforce and Economic Dev	Rollup From - CONTEd
3	IT	Information Technology	Other Approving
3	HR	Human Resources	Other Approving
4	ACAD	Academic Affairs	Rollup From - SB, Rollup From - WED
5	ECAG	Executive Cabinet Approval Group	Other Approving

At the bottom of the interface, there is a button labeled "Authorize Unit Listing" which is circled in red in the image.

2. When the proposal is ready to be routed, **OSP** will click the “Submit for Routing” button on the left side of the page. PIs should **NOT** click this button. Submitting a proposal for routing without OSP consent or knowledge will result in failure of the process.



3. Approvers will receive emails from Cayuse requesting that they review and approve the proposal. A link to the system along with the proposal number will be provided in the email. See the step-by-step guide for approvers in the Certifications and Approvals section of the [Cayuse SP - User Guide: Certifications and Approvals](#).



4. OSP will track the routing process and contact any approver who has not approved a proposal within 24 hours of receiving an approval email.
 - a. The PI can also view the approval process by clicking on the “View Routing Status” button in the left-hand menu.
5. If applicable, OSP will arrange approval in Cabinet which requires a few extra steps not included within Cayuse.
6. Once the proposal is completely approved, OSP will inform the PI.

Completing the Sponsor Application

Approval of the Cayuse SP proposal signals that SLCC College leadership has approved to PI to move forward with development of the application to the sponsor. The PI will continue to work with their Grant Officer to complete the sponsor application, which will be reviewed and approved by the Office of Sponsored Projects for submission to the sponsor.

The PI is only authorized to submit the application to the sponsor *after* final review by OSP of all application materials. The PI or Grant Officer will upload all final materials to the Proposal Attachments page.

Next Step

Navigating and Completing **PI Certifications and Internal (Unit) Approvals**.

For more information, see [Cayuse SP - User Guide: Certifications and Approvals](#).