

How to Submit an IPF to Graduate Studies

Planning to submit a fellowship application? This is your first step. Before submitting to an external agency, you MUST complete an Internal Processing Form (IPF) and have it routed to and signed by all necessary parties before Graduate Studies will sign off on your fellowship application. The IPF is also required to process external funding.

- Go to ucdavis.cayuse424.com and log in. *If you are unable to log in, please request access from orcayusehelp@ucdavis.edu*
- Click on Cayuse SP (Sponsored Programs)
- Under Proposal Dashboard, click Start New Proposal

Starting a New Proposal

- Click in Sponsor field; it will allow you to search for your sponsor. If your sponsor is not listed, repeat the search and select Miscellaneous Sponsor. Enter your sponsor name and information in the Submission Notes.
- Enter funding opportunity number published by sponsor
- Enter sponsor program name (title of the competition)
- Enter URL for the call for proposals or guidelines for proposals
- Skip prime funding agency, unless your proposal is for a program that includes flow-through funding (ie, the granting agency is different than the sponsor/agency to which the proposal is being submitted)
- Click in Admin Unit and choose appropriate unit. This will be the unit that will administer your funds if you are awarded, not Graduate Studies. If you are in a graduate group, it will be the department your faculty mentor belongs to.
- Click in Primary Administrative Contact and choose appropriate name. This will be the person who will administer your funds if awarded. NOTE: this most likely is not your graduate coordinator, but rather the account manager who works with your faculty mentor.
- Enter Short Project name. This should be "Submission Due date / Last Name / Sponsor"
- Enter your project start and end dates. This may be an estimate if you have not set firm dates.
- **Activity code: choose Training/Instruction**
- **Proposal Type: ALWAYS choose "New – Graduate Studies"**
- Instrument Type: Generally you will choose grant. If you think this is inappropriate for your proposal, please contact your Graduate Studies Analyst for guidance.
- Submission Method: Choose the system or portal your application will be submitted under. If you are creating an IPF for an after the fact award, please select "paper."
- You may skip affiliated unit
- Enter sponsor deadline, including the time (in military format) and time zone.
- Enter title of project
- NEVER select "create a paired proposal"

- Click save; this will lead to you an item to do list. ***Make sure there is a green checkmark beside each item on the left before you submit the IPF for routing.***

Investigators/Research Team

- Always list yourself as Lead PI. Click in Last Name field and search for your own information to populate.
- Person months: enter number of months on this fellowship.
- Sponsored Effort %: Enter 100% (as long as all funding is going to you)
- Allocation of Credit %: Enter 100% (as long as all funding is going to you)
- Click Save Personnel
- Add information for your faculty sponsor/mentor: Click in Last Name field and search for your mentor's information to populate.
- Role: Select Other Key Participant, enter Role Title
- Person Months: Enter number of months on this fellowship.
- Sponsored Effort %: Enter 0% (as long as all funding is going to you)
- Click Save Personnel
- If your proposal has co-sponsors, enter them as above, except select Other Participant (no routing) for their role.

Budget

- Select Summary Budget form
- Enter number of budget periods (number of years for your fellowship)
- Enter start and end dates for 1st budget period
- Click yes or no for Internal Cost Sharing
- Select appropriate F&A rates. You will likely choose either the on campus or off campus organized research percentage, unless the sponsor specifies otherwise.
- Enter direct costs being requested for both the first project period and the entire project. Include the F&A base if F&A is being recovered.
- Additional Resources: most of the time you will select no. If you think this is inappropriate for your proposal, please contact your Graduate Studies Analyst for guidance.
- Click save

Financial Conflicts of Interest in Research

- Determine which disclosure is required.
- Complete and file your disclosure (NOTE: this will redirect you to another page where you must file your disclosure)
- Certify this section
- Click Save

Regulatory Compliance

- Enter whether or not your proposal intends to involve human subjects or vertebrate animals.

- If either answer is yes, answer applicable questions about IRB and IACUC
- Check appropriate box if your proposal uses any of the listed agents; if not, click “none.”
- Click Save

Subrecipients

- Fill this section out only if you are awarding a subaward. If not, click “No Subcontractors.”

Foreign Activity

- Please answer all questions. If you are unsure about whether or not you are importing/exporting goods, click “yes”.
- When finished, click save.

Special Interest

- Answer all questions; click Save.

Additional Questions

- Answer questions 1-5
- Answer questions 6 and 7 if they apply to your research.
- Click Save.

Location of Sponsored Activity

- Enter all locations where you plan to perform your work. For campus locations, the building name for your lab is sufficient.
- Make sure percentage of all locations add up to 100%

Proposal Abstract

- Select whether or not you give permission to make you abstract publicly accessible (please note, many applications require you to make your abstract public but this is an internal question)
- Copy and paste in your abstract. If you do not have one, write a short (up to 200 word) summary of your research.
- Please select applicable animal category. Note, human is listed as an animal category.

Proposal Attachments

- Upload the request for applications from the sponsor, a budget (in whatever format the sponsor requires), and a draft of your proposal. NOTE, the draft of your proposal is unnecessary if you are submitting via Cayuse 424, Fastlane, or NIH ASSIST since we will already have access to your materials in those portals.
- Upload the PI exception form, found at https://research.ucdavis.edu/wp-content/uploads/Form-105_2018.pdf. Before uploading, you and your faculty mentor must sign the form. The remaining approvals will be completed when IPF is submitted for routing.

- If you have no attachments, click No Attachments

Approving Units

- Make sure your approving units are entered in the correct routing order. Your administrative department should be 1, followed by the PI department and your faculty mentor department.
- Please note, you may need to re-order the units so any “roll-up from” units are listed after the relevant unit. If this is the case, you will see “roll-up from” listed next to a unit.
- If you have Internal Cost Sharing, have that unit be the last in routing order.
- Click Authorize Unit Listing

Submission Notes

- Include any additional pertinent information in this field and click Add Note.

Submit For Routing

- Once you have verified that each item in the list has a green check mark in the left of the screen, click **Submit for Routing**.
- The IPF will now begin routing for approval in the order you specified. *Graduate Studies will not consider your IPF complete until we receive a fully approved IPF.*
- Once you have submitted the IPF for processing, please notify Graduate Studies at externalfellowships@ucdavis.edu