

Cayuse424: How to Create a Routing Chain and Route an Application to OSP

Once an application is final, it is routed to the Office of Sponsored Projects (OSP) for review and approval.

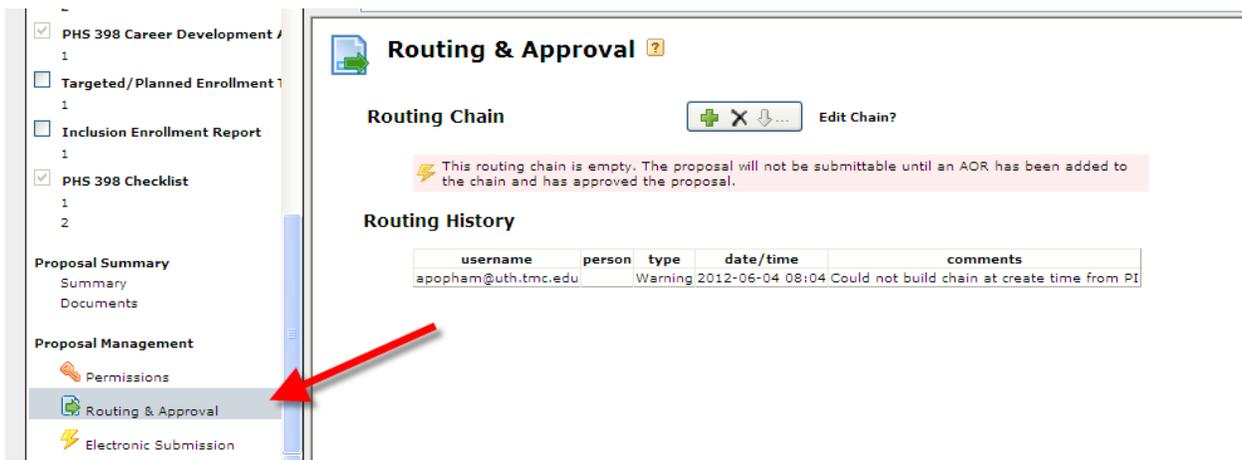
Cayuse 424 routes a proposal for approval according to a “routing chain” which is established for each proposal. There are two ways to route a proposal:

- The chain can be built automatically based on the Routing Profiles of the PI and other relevant approvers.
- The chain can be edited and/or built from scratch within a proposal, and can also be modified by participants in the chain as the proposal moves along the route.

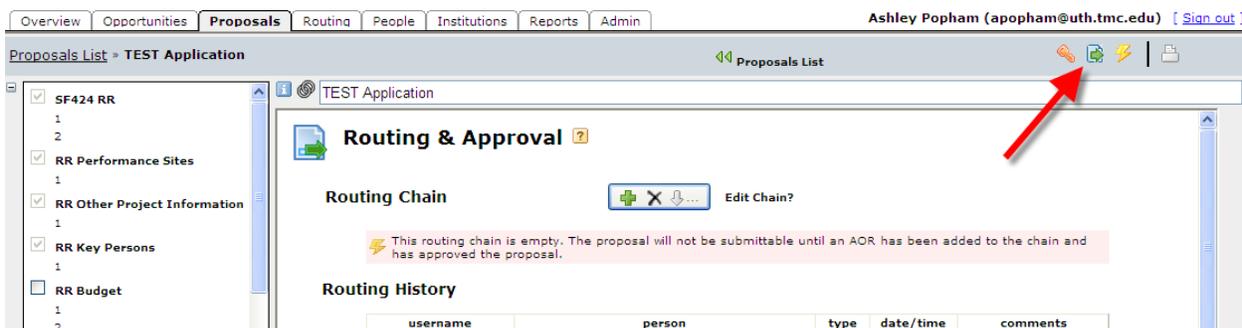
In order to submit a proposal to the agency, OSP must approve it. Therefore, OSP must be listed last on the routing chain.

To create the Routing Chain, follow these steps:

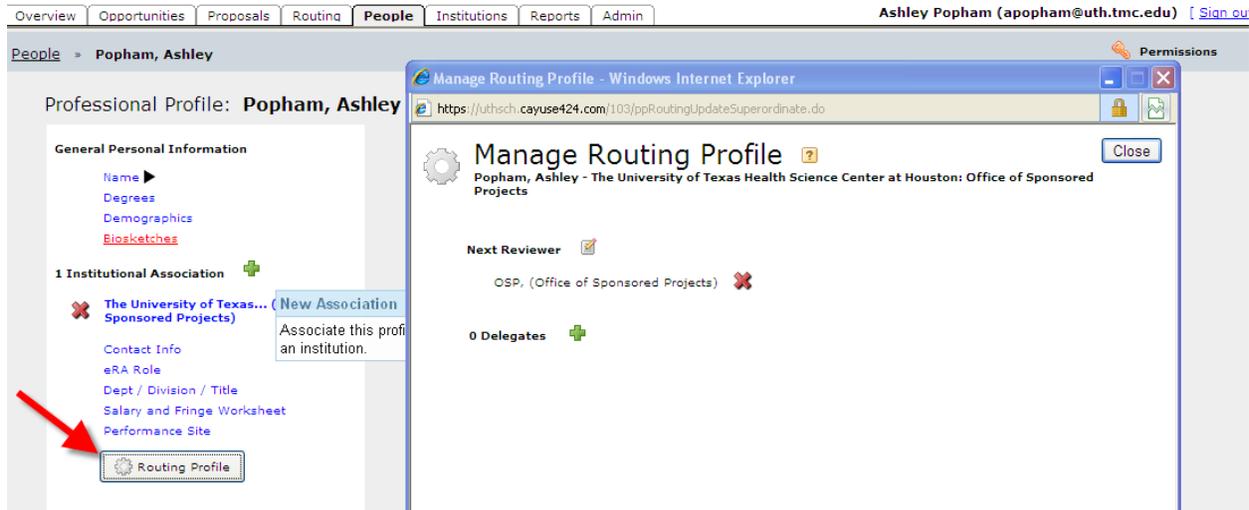
1. While in the application, go to:
 - a. **Proposal Management -> Routing and Approval**



- b. Or go to the **Manage Routing** button



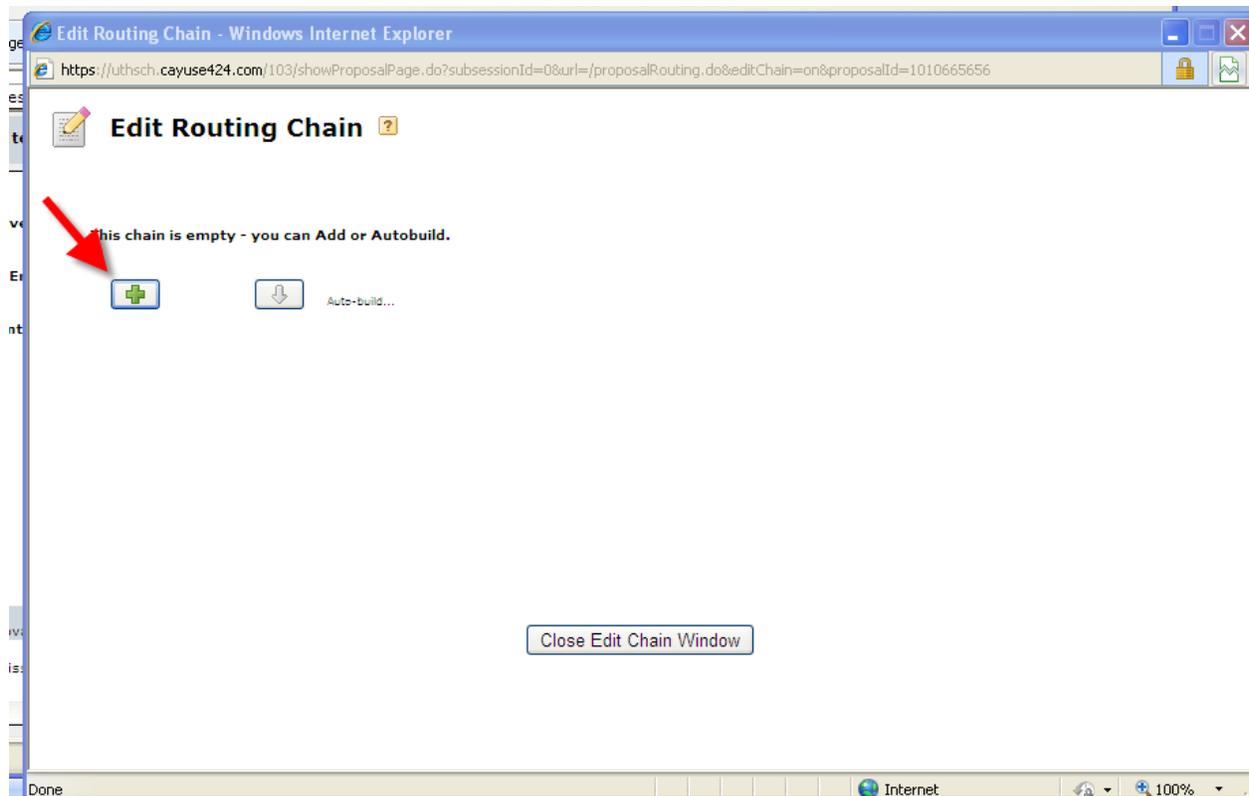
Note: The PI may already be listed at the beginning of the chain since the routing usually starts with the PI of an application. The Auto-build Chain icon will list the PI automatically as well as anyone they have set up in their Profile as a next Reviewer. Click [here](#) for instructions.



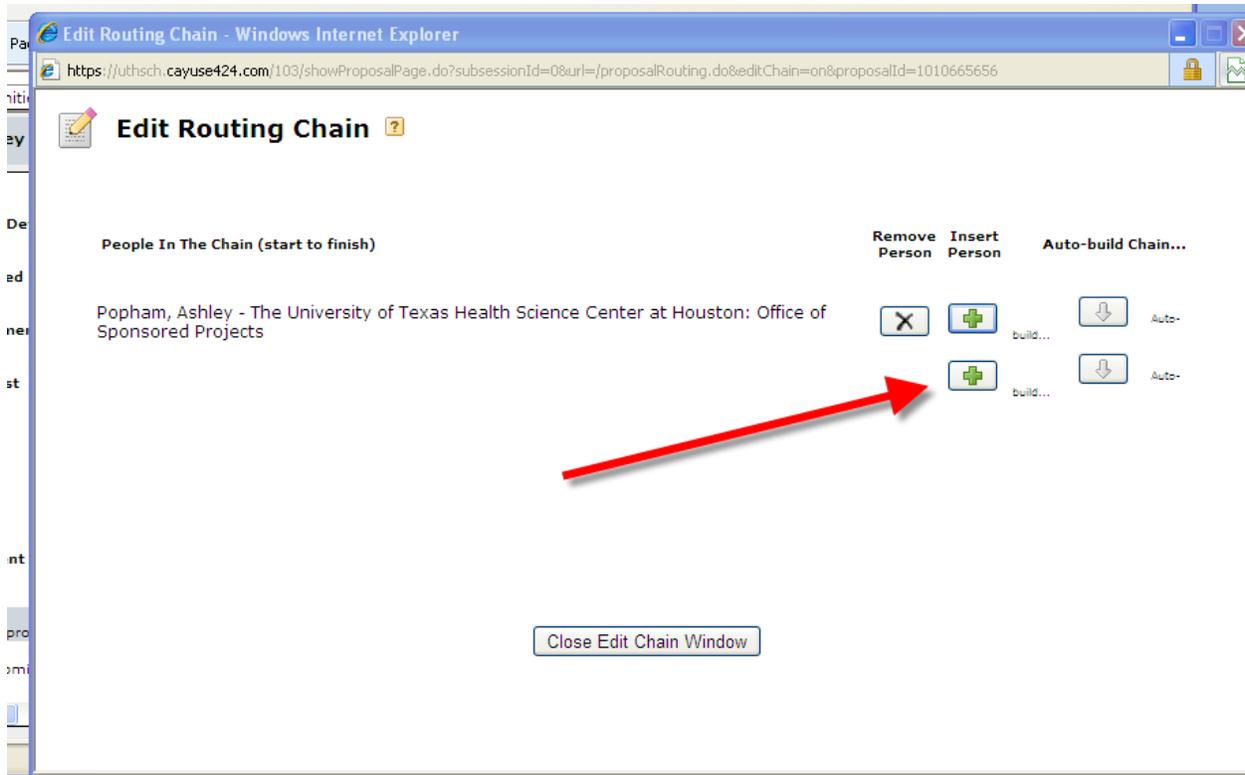
c. Click on Edit Chain to add reviewers to the Routing Chain.



2. A new window will pop up.
3. Click the (+) sign to edit the Routing Chain.



4. A window will pop up, choose the reviewer by typing in their name I the Search box and clicking **Search**. Select the name and click **Add to Chain**. The first reviewer is the PI or the Dept Administrator.
5. Continue to add reviewers to the chain that will need to review the application.



6. OSP will always be the last one on the Routing Chain since OSP is the final reviewer and approver.
7. The final routing chain will have OSP last as in the example below.



To route an application to OSP, follow these steps:

1. Each box must be checked in order. OSP must be on the chain prior to checking the previous boxes. If not, the application will not get routed.
2. Check the box next to your name.

3. The application will be routed to the next person listed. That person will then need to check the box next to their name once the application is reviewed.
4. This will continue until the last person (listed before OSP) has checked their box.
5. Once the last person (listed before OSP) has checked their box, then it is routed to OSP for review. See example below.

- Targeted/Planned Enrollment 1
- Inclusion Enrollment Report 1
- PHS 398 Checklist 2
- PHS 398 Cover Letter 1
- Proposal Summary**
 - Summary
 - Documents
- Proposal Management**
 - Permissions
 - Routing & Approval
 - Electronic Submission

Routing & Approval ?

Routing Chain ... [Edit Chain?](#)

Begin

- Popham, Ashley - The University of Texas Health Science Center at Houston: Office of Sponsored Projects
- OSP, - The University of Texas Health Science Center at Houston: Office of Sponsored Projects

End

An AOR has approved this proposal, so it is now submittable by a suitably authorized user.

Routing History

username	person	type	date/time	comments
	Popham, Ashley - The University of Texas Health Science Center at		2013-05-04	