

Cayuse Checklist for JMU Principal Investigators

To access Cayuse, visit [Quick Login Access](#) and select Cayuse or go directly to <https://jmu.cayuse.com>. You will be prompted to enter your JMU eID and password. Lastly, in the top right corner, select: **Products > Sponsored Projects**.

JMU Timeline for Proposal Development

While the Office of Sponsored Programs (OSP) encourages you to reach out as early as possible, please observe the following timeline at a minimum for internal forms and approval:

At Least 4 Weeks before Submission Deadline

- **Start Budget Development:** Begin at least 4 weeks before the sponsor's deadline. Start earlier if your budget includes substantial personnel costs, subrecipient costs, participant support costs, cost sharing, or extensive travel.
- **Start Subrecipient Materials (if applicable):** If your budget will allocate funds to one or more external entities,* begin discussing with OSP at least 4 weeks before the sponsor's deadline. OSP must determine if a collaborating entity will be a subrecipient or contractor. Subrecipient(s) may need extra time to: register or renew on SAM.gov, revise their budget, draft agreements, obtain signatures, etc.

**Private individuals cannot receive subawards. NSF linked collaborative proposals from multiple organizations (PAPPG II.E.3.b) do not count as subawards.*

5 Business Days Prior to Submission Deadline

- To obtain university submission approval on the proposal, you must provide finalized proposal materials **5 business days prior** to the submission deadline. Observing the [5-business day policy](#) allows OSP to time to check your proposal for compliance issues, ensure budget consistency, and review your materials against the program announcement to verify that all requirements are met.

10 Business Days Prior to Submission Deadline

- Final subrecipient materials (if applicable).

Proposal Materials

For access to forms and additional resources, visit the OSP Forms & Tools page at:

<https://www.jmu.edu/sponsoredprograms/forms-tools-resources/index.shtml>

REQUIRED		
Document	Notes	Where to Upload
1. Scope of Work	Provide a brief summary of the work to be performed. A draft of the narrative or abstract may be used to obtain university approval but the final version must be provided after submission.	Proposal Sections > Additional Information > “Attach your Scope of Work”
2. Final Line-Item Budget	To start: send drafts of your budget in Excel to your grant specialist or summarize your needs in narrative terms. Work with OSP to finalize.	Proposal Sections > Summary Budget > “Upload a detailed proposal budget”
3. Final Budget Justification	Based on your final line-item budget.	Proposal Sections > Summary Budget > “Upload a budget justification”

MIGHT BE REQUIRED		
Document	Notes	Where to Upload
4. Overload Pay Authorization	Required if overload pay is requested on the budget. <i>*Must answer yes to “Does the project involve overload pay for one or more personnel?”</i>	Proposal Sections > Summary Budget > “Upload an overload authorization form”*
5. Letters of Commitment	Required for external partners that are not subrecipients but are providing cost sharing. The letter should indicate the amount of quantified external match the partner is providing. <i>*Must answer yes to “Does the budget contain external cost share?”</i>	Proposal Sections > Summary Budget > “Upload a commitment letter for the external cost share”*
6. Indirect Costs Waiver	Required to request approval to waive or reduce indirect cost that is not limited by sponsor. Discuss with your OSP contact before preparing.	Attachments

7. Cost Sharing Request Form	<p>Required if JMU's in-cash match is over \$10,000. Discuss with your OSP contact before preparing.</p> <p>OSP assists with and reviews this form but approval is dependent on relevant signing authorities.</p> <p><i>*Must answer yes to "Does the budget contain cost sharing as a portion of the project or program costs?" AND "Does the proposal include \$10,000 or more internal in-cash match?"</i></p>	Proposal Sections > Summary Budget > "Upload the cost sharing form"*
8. Graduate Research Assistant – Tuition Application	<p>Required if asking to waive tuition for a Graduate Research Assistant. Not required if tuition is being requested from the sponsor on the line item budget.</p>	<i>If awarded, send final copy to OSP and we will upload to the award</i>

REQUIRED FOR SUBAWARD(S)		
Preliminary (For Each Proposed Subrecipient)		
9. Subrecipient Scope of Work (Draft)	OSP must determine whether an entity is a subrecipient or a contractor. Only approved subrecipients can move forward for a subaward.	Send to areharbf@jmu.edu
10. Subrecipient vs. Contractor Checklist		
For Each Approved Subrecipient		
*To create the Subawards section on Cayuse, answer yes to “Will any portion of the project be performed by a Subrecipient?” under Performance Sites. If your documents exceed 10 MB, you can upload the remainder under the Attachments tab.		
Document	Notes	Where to Upload*
11. Subrecipient Commitment Form	Signed by an Authorized Official who has been delegated the legal authority to commit the organization to a binding agreement.	Subrecipient Attachments
12. Subrecipient Scope of Work (Final)	Used as the basis of the subaward agreement and must include the role and responsibilities of the organization to the project including objectives, tasks, and deliverables.	Subrecipient Attachments

13. Subrecipient Budget	Subrecipients must have a separate budget, the total of which will appear as a line item on the JMU budget.	Subrecipient Attachments
14. Subrecipient Budget Justification	Sponsor budget forms must be used when available and the budget must be separated by funding year.	
15. FDP Attachment 3B Form	Page 1, and if applicable, Page 2	Subrecipient Attachments
16. F&A Agreement (a.k.a. NICRA)	A copy of the organization's federally negotiated indirect costs rate agreement (NICRA) is required if indirect costs are included in the budget, otherwise the <i>de minimis</i> rate will be applied.	Subrecipient Attachments

MIGHT BE REQUIRED FOR SUBAWARDS		
Document	Notes	Where to Upload
17. Biosketch	Completed in sponsor required format for all senior subrecipient personnel.	Attachments
18. Current and Pending Support	Completed in sponsor required format for all senior subrecipient personnel.	Attachments
19. Facilities, Equipment, and Other Resources	Completed in sponsor format describing the facilities, equipment, and other resources already available from the subrecipient entity for the project	Attachments
20. Letter(s) of Commitment	Must be on letterhead and signed by the organization's AOR, including the monetary amount of committed match (if applicable), plans to participate and accept a subaward from James Madison University in accordance with the approved statement of work and budget, and commitment to abide by all associated terms and conditions if awarded.	Attachments