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1 Introduction

Cayuse (formerly known as Evisions) is a web-based information system that supports research and sponsored program administration. This application, implemented on all UT campuses, allows for greater integration and collaboration among sponsored program offices across the UT-University system.

Cayuse creates a permanent record of grant applications and award documents, and is used not only for proposal review, but also for the approval process of a grant award and related grant contracts, such as confidentiality agreements and data use agreements for research projects.

Overall, Cayuse allows for greater autonomy for faculty and staff in the internal approval process, easy access to all of your sponsored program information via a web portal, and increased automation for processes such as internal routing, document retrieval, and account set-up!
2 Getting Started

1. Open up either Firefox or Internet Explorer, because they are fully-supported browsers. Chrome and Safari are “provisionally”-supported browsers.
   a. Enable popups, cookies, and java script for this site.

2. Access Cayuse through the Office of Research and Sponsored Programs (ORSP) website or type tennessee.cayuse424.com into your web browser.

3. It will bring up a login page.
   a. Under “NetID” enter your UTC ID (ex. Abc123).
   b. Under “Password” enter your UTC password. This is the same password you use to login to the university computers.

4. If you are having trouble logging in, there could be a variety of issues:
   a. You may need to clear your cookies, close your browser, and re-open it.
   b. You may need to try using a different browser. Try Firefox or Internet Explorer.
   c. You may not have access yet. If you cannot login or cannot find a person you wish to add to a record, you must contact ORSP to request access. You can call (423) 425 – 4431 or email orsp@utc.edu for assistance.
3 Navigating the Home Page

1. Once you are logged in, it will bring you to the Cayuse home page.

2. From the home page, you can access 2 modules: 1. Cayuse Sponsored Projects (SP) module or 2. Cayuse 424, the portal for proposal submission to the Federal grants government system.

Cayuse Research Suite

Research Administration Modules

- Cayuse SP (Sponsored Projects)
- Cayuse 424

System Administration Applications

- Backbone
- Research Contacts
- Workflow

Application Help

- Research Suite Support Center
3. Click “Cayuse SP (Sponsored Projects).” Cayuse 424 is used for certain federal grant proposals. If something needs to be entered into Cayuse 424, ORSP will work directly with the Lead Principal Investigator (PI) to submit the proposal to the sponsor.
4. Below is the home page for Cayuse SP.
5. Use the navigation pane on the left-hand side to work on or get information on proposals and awards.
   a. These can also be accessed by hovering your mouse over “MY DASHBOARD.”

   ![My Dashboard Menu]

   ![My Dashboard Menu]

6. If you are helping a faculty member fill out a proposal, click “Start a New Proposal” and go to Section 5 for further instructions.

7. “My Proposals” list any proposals you are currently working on or have submitted. Please note proposals in the submitted tab have been submitted to ORSP, **NOT** to the funder.
8. “Proposals In My Unit” list any proposals in your department and the status of those proposals. This is useful because Cayuse reports (Section 4) only pull approved proposals.
   a. Each page only shows 20 proposals at a time. Use the arrows at the bottom of the page to view more proposals in your department.
   b. You can limit your search by using the search boxes at the top of the page.
9. “My Awards” list any awards, active projects, or inactive projects you are working on.

10. “Awards In My Unit” list any awards, active projects, or inactive projects in your department.

11. Typically, you will not have anything in your “PI Certification Inbox,” but faculty in your department may use this function. It lists any proposals that require your certification as the Lead PI. It also shows proposals that you have previously reviewed.
4 Running Reports

Cayuse reports allow you to easily retrieve information on multiple proposals and awards. These reports pull information on proposals that have been approved and awards that have been reported. This means proposals and awards may not show up in certain reports, because the time period chosen does match the approval or report date.

You cannot access Cayuse through the Cayuse Research Suite where you submit proposals. Cayuse reports are accessed through the UT SharePo site:

4.1 Logging In

1. Open either Firefox or Internet Explorer, because they are fully-supported browsers. Chrome and Safari are “ provisionally” - supported browsers.
   a. Enable popups, cookies, and java script for this site.

2. A popup window will appear and request your login information.
   a. Under “Username” enter your UTC ID (ex. Abc123).
   b. Under “Password” enter your UTC password. This is the same password you use to login to the university computers.
3. Once you are logged in, you should see the screen below. The home screen has all the available reports for proposals and awards.
   a. If you cannot access this site, please contact ORSP@utc.edu.
4.2 Frequently Used Reports

4.2.1 Proposals

4.2.1.1 Proposal Listing by Approval Date

“Proposal Listing by Approval Date” allows you to look up all approved proposals from a specified time period. Please note UTC transitioned to Cayuse in 2015, proposals approved before 2012 may not appear in reports.

1. When you click on “Proposal Listing by Approval Date,” it may ask you for your authentication again.

2. Once you put in your username and password, it takes you to a new window.

3. Choose a specific time period by entering the MM/DD/YY or by clicking the calendar tool.
4. Once you select your desired dates, click “View Report.”

5. The report appears below the dates. You then have the option to save or print the report. It is best to save it as an Excel file.
6. The “Proposal Listing by Approval Date” report does not let you select a specific department. Saving it as an Excel file allows you to easily sort and filter to find your departments’ proposals.
   a. To sort by department, go to “Sort & Filter.”
   b. Click “Custom Sort.”
   c. You can sort by “College” or “Award Admin Dept.” This will sort the rows in alphabetical order by “College” or “Award Admin Dept.” This should help you find proposals specific to your department.
   d. You can also sort by “PI Last Name” or “PI First Name” if you are looking for proposals from a specific PI.
4.2.1.2 Proposal Listing by Approval Date with Parameters

“Proposal Listing by Approval Date with Parameters” allows you to search for approved proposals with additional filters. For example, you can filter by department, Lead PI, and by sponsor.

1. For each category, the default will have all items selected. You can uncheck “Select All” and check the items you want.
2. The example below shows a report for proposals approved between 11/20/2016 and 11/20/2017 for Biology only.
   a. First, deselect “Select All” and check “Biology.”
   b. Then click “View Report” on the right hand side.
   c. Save the report as an Excel file.
   d. Now you have a report of approved proposals for your department!
4.2.1.3  Proposal Listing by Person with Roles

“Proposal Listing by Person with Roles” allows you to look up all persons associated with a specific proposal. For example, it will list the PI, Collaborating Investigators, and Key Personnel.

1. For this report, you can select specific roles (such as the ones listed above) in addition to the typical filters.

![Filter options](image)

   a. It lists the Last Name and First Name of an individual and then their role.
   b. Because it’s sorted by individual, it will duplicate projects and proposed costs. For example, Henry Spratt and David Levine worked on the same project, so the project and total sponsor proposed costs are duplicated. As a result, you should not use this report to count the total number of proposals or total proposed dollars for your department.

![Proposal listing](image)
4.2.2 Awards

There are a variety of reports that let you pull specific information on awards. Below are some of the most frequently used. Any award report you run should have “obligated only” listed either in the report title or noted under “Reporting Designation.” The filing system in Cayuse reports an award at every stage (anticipated, obligated, executed, etc.); therefore, if you run a report that is not for “obligated only,” you will get duplicates of awards and award dollars.

4.2.2.1 Award Summary by College

“Award Summary by College” lets you pull award information directly from your college for a specified period of time. It gives you information on the departments, Lead PI, award number, sponsor, and total.

1. Use the calendar to select your time range or type it in (DD/MM/YY).

2. Select “Chattanooga” for campus and your college using the drop down buttons.

3. Click “View Report.”
4. Save it as an Excel file to obtain a summary of fiscal years (July 1 – June 30) included in the date range.

5. If you click on the “+” symbols to the left of the rows it will expand to give you information on the departments, Lead PIs, and award totals.
4.2.2.2  Award Listing by Person with Roles

Similar to “Proposal Listing by Person with Roles”, “Award Listing by Person with Roles” lets you look up all persons associated with a specific award. For example, it will list any PI, Collaborating Investigators, and Key Personnel.

1. Once you click on the report, you will have similar filters as the “Proposal Listing by Person with Roles” report. You can look up specific individuals, roles, or departments.
   a. Choose Chattanooga for your “Campus.”
   b. Choose obligated under “Reporting Designation.”

2. Similar to the “Proposal Listing by Person with Roles,” the Excel spreadsheet lists all persons involved in a project in separate rows. This means projects and award amounts may be duplicated. (Use another report if you’re counting total number of projects or number of dollars for your department).
4.2.2.3 Award Listing by Reporting Date Obligated Only

This report gives you a summary of awards for all UTC colleges and departments, which you can sort and filter in Excel. Be sure not to choose the “Award Listing by Reporting Date” or it will give you duplicates of projects and award amounts.

1. Put in the desired time period using the calendar icon or typing in the date.
   a. Click “View Report.”
   b. Save as an Excel file.
5  Filling Out a Proposal Record

You may need to assist a faculty member in your department fill out a proposal entry. The information below offers you a step-by-step guide.

5.1  General Information

1. Log in to Cayuse. Refer to Section 2 for login instructions.

2. Go to the “Proposal Dashboard” on the left and click “Start new Proposal.”

3. Under “Sponsor Information”, click the magnifying glass.
4. This will bring up a pop up window where you can search keywords to find your desired sponsor.

a. If you cannot find the name of the sponsor, type “not listed” in the search box. Click on the Search button. Select “Sponsor Not Listed.”
5. Under “Admin Unit,” **ALWAYS select Research & Sponsored Programs.** This will enable ORSP to review and make corrections before the proposal is routed to other administrators. As part of its review, ORSP will change the admin unit to the appropriate department at the end of the routing chain.
6. Under “Primary Administrative Contact,” click the magnifying glass. You will search for the faculty member who will be the Lead PI for the proposal.

   a. Search using the last name of the faculty member and select their name.

   b. If you cannot find the person you wish to add, contact ORSP for assistance.
7. Fill out the “Short Project Name,” “Project Start Date,” and “Project End Date.”

8. Choose the appropriate “Activity Code.”
   a. If you are not sure what the appropriate activity code is for the proposal, you can find definitions for the above codes on the ORSP website.
9. Select the “Proposal Type” by clicking the drop down button.

10. Select the “Instrument Type” by clicking the drop down button.

11. Select the appropriate submission method from the drop down menu. If you are unsure, just select “other.” ORSP will make corrections if needed.
   a. If you select other, it will request an email or URL. If you do not know or there is not one, leave it blank.
12. “Affiliated Unit” is for situations when a department needs to review or approve a proposal but none of the project personnel are in that unit. You can typically skip this step.

13. Fill out the “Sponsor Deadline” and “Title of the Project.”

14. Ignore the three radio buttons at the bottom of the page. ORSP will handle these for you.

15. Click “Save” at the bottom of the page.
16. Once you save the general information page, an “Item List” appears with a routing number. The remaining sections are listed, along with the option to “Administer Proposal” or “Submit for Routing.” As each section is completed a green check mark appears.

5.2 Investigators/Research Team

In this section, input information regarding all members of the research team (Lead PI, PI, Key Participant, etc.).

1. The starred boxes indicate a required field. Start by inputting information about the Lead PI.
2. Similar to the “General Information” section, search for the Lead PI’s last name.
   a. If you cannot find the Lead PI’s name, contact ORSP.

3. When a Lead PI’s name is selected, it should prepopulate information for “First Name,” “Phone,” and “Email.”

4. “Person Months” is how many months per year a person (in this case the Lead PI) will work on the project. Some sponsors require this information, but many do not. Enter 0 here. This information will be included in the proposal and/or budget attachments.
5. Next, choose the appropriate department for the Lead PI by clicking the search icon. You will not choose “Research & Sponsored Programs” as you did in the “General Information” section.

6. The “Role” will initially default to “Lead Principal Investigator.” Leave this as is.

7. For “Sponsored Effort %” and “Cost Shared Effort %,” enter 0. This information will be included in the budget attachment.

8. “Allocation of Credit %” is optional, but it is highly recommended that you fill this in. Identify what percent of credit/recognition the PI and collaborators should have for the project.

9. Once the required fields are filled out, click “Save Personnel.”
10. After the Lead PI’s information is saved, it will refresh the page. The Lead PI’s information will be at the bottom under “List of Personnel.” You can edit and delete this information if necessary.

11. You can then input information for the remaining team members (if any) by repeating steps 1-9.
   a. For step 5, choose the team member’s department. This may be different than the Lead PI’s department.
   b. For step 6, choose the role specific to the team member.
5.3 Budget

1. The “Budget Form” defaults as “Summary” and the “# of Budget Periods” defaults at 1. You can leave these as is.

2. Enter the same dates for the “Current Period” as are entered for “Entire Project.”

3. If the proposal requires cost-sharing, click “Yes.”
4. Clicking yes expands the section.
   a. For UTC cost-sharing, fill in the appropriate details for each department/unit contributing cost-sharing. Enter the total amount for the entire project to be cost-shared by the department/unit (don’t break the amount into separate years).

   b. When you check “Agency Mandated” it expands the section further.
5. For non-UTC cost-sharing, fill in the appropriate details for each organization that is contributing cost-sharing. Enter the total amount for the entire project to be cost-shared by the organization. Use the “Comment” box to provide additional details on the cost-sharing.
   a. If you cannot find the name of the organization providing cost sharing, type “not listed” in the search box and click on the search button. This will produce a popup containing “sponsor not listed” for you to select. (This is the same procedure you do on the General Information page, if the sponsor name is not listed in the database.)

6. For the F&A Rate section, only one rate is needed (Cayuse has room for three rates, to accommodate needs on the different UT campuses.) Click the box by “F&A Rate (1)” and under “Current Period.”
7. **A popup chart appears**, listing the federally-negotiated F&A rates for all the UT campuses. You may have to expand the popup to see UTC’s rates, which are toward the bottom. For most proposals, the appropriate rates are 36% on campus, 13% off campus. Contact ORSP if you have questions about what F&A rate should be used.

a. If the sponsor for your proposal specifies another F&A rate be used, type that rate number in the fill-in box at the bottom of the page and click the “Change Rate” button.
8. Under the “Budget Categories” section, enter the “SPONSOR DIRECT COSTS” and the “BASE for F&A Rate (1).”
   a. Under “current period” enter the total direct costs for all years of the project and the total F&A base for all years.
   b. Cayuse calculates the remaining portions of the budget.

9. Under “Additional Resources,” indicate whether you used services provided by the Office of Research. Please note, the “Click here for a full list” link redirects you to UTHSC’s information, which is not applicable to UTC. If you have specific budget questions, please contact ORSP at orsp@utc.edu.
   a. If you click yes, it will ask you to specify which resources you used.
   b. Save changes.
5.4 Conflict of Interest

You must answer all of the questions pertaining to conflict of interest. It should be answered for anyone considered an investigator on the project. Investigator in this sense is “defined as anyone responsible for the design, conduct, or reporting of research and/or other sponsored projects externally funded, or proposed for such funding, which may include, for example, collaborators or consultants.”
5.5 Regulatory Compliance

Regulatory Compliance asks you questions about the research being done and whether it involves human or animal subjects, and/or any hazardous materials, nanomaterials, or materials provided by the sponsor.
1. If you answer yes for “Human Subjects,” it asks if the Lead PI has submitted an IRB form.
   a. If the Lead PI has not, you must indicate why.

2. You then answer the same questions for “Animal Subjects.”
   a. If you answer yes, it will ask you whether the Lead PI has submitted an application for IACUC approval.
   b. If he or she has not submitted one, you will need to indicate why.
3. Check any research materials that may be used during the project.

4. Save changes.
5.6 Subcontractors

If the project has subcontractors (subawardees), add them in this section. If the project does not have subawardees, you can click “No Subcontractors” at the bottom of the page. Please note subawardees are different from vendors or contractors. See UT Fiscal Policy FI0230 for details on distinguishing among subawardees, contracts, and vendors.

Federal Funding Accountability & Transparency Act (FFATA)

If this project is a federal award that involves any first-tier subawards of $25,000 or more, the project may be subject to FFATA which requires certain information to be reported on subawards that exceed the $25,000 threshold.

Note: If no subcontracts are proposed, please click the No Subcontractors button to complete this section.

1. To add subawardees, click the search icon and type in the subcontractor under “Keyword.” When the name appears, select it.
2. It will prepopulate into the subcontractor box. You can then click the “Add Subcontractor” button.
   a. If you cannot find the name of the subcontractor, type “not listed” in the search box and click on the search button. This will produce a popup containing “sponsor not listed” for you to select.

3. Once you add the subcontractor it appears under the “List of Subcontractors.” Once you have added all of the subcontractors working on this project, click “Authorize Subcontractor List.”

4.
## 5.7 Export Control

Identify “any items, technology, or activities on a proposal that may have export-control implications” by answering the below questions. If you have any questions, you should contact the Office of Research Integrity at (423) 425-5867.

<table>
<thead>
<tr>
<th>1. Does the proposed work involve any of the following, or do you have any other reason to believe it may involve export control or security concerns?</th>
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</table>
| * Homeland Security concerns  
* Restricted Department of Energy technology  
* Spacecraft technology (U.S. Government) or DoD Form 2345 Military Critical Technical Data Agreement  

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
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2. Do you anticipate that the project work may involve:

| * a. Traveling outside the U.S. or  
* b. Shipping, transporting, transmitting, or carrying any material or equipment related to this project outside the U.S. (examples include: OPSE, biologicals, diagnostics kits, reagents)? |
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<tbody>
<tr>
<td>Yes</td>
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| * b. A foreign national is any person who is NOT:  
* a U.S. citizen;  
* granted permanent residence as demonstrated by the issuance of a permanent resident visa (i.e. “Green Card”); or  
* a “protected person” as defined by 8 USC 1234b(a)(2)(C).  
It also means:  
* any foreign corporation;  
* business association;  
* partnership;  
* trust;  
* society; or  
* any other entity or group that is not incorporated or organized to do business in the United States, as well as international organizations, foreign governments and any agency or subdivision of foreign governments (e.g. diplomatic missions).  
Examples include: graduate assistant from another country, visiting scholar, international collaborator on research team, etc.  
Does this project involve work with foreign nationals, as defined above? |
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<tbody>
<tr>
<td>Yes</td>
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<tr>
<th>* c. Transmitting funds (through payments, for example) or goods or technology to any of the following countries on the OFAC list</th>
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<tr>
<td>Yes</td>
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3. Do you anticipate that the project work may involve:

<table>
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<tr>
<th>* a. Non-commercial encryption or information security software or any classified materials, equipment, technology, or data?</th>
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<tbody>
<tr>
<td>Yes</td>
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</table>

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<tr>
<th>* b. Any equipment, technology, materials, software, or other defense articles listed on the United States Munitions List (USML) under the International Traffic in Arms Regulations (ITAR), or specifically designed, modified, or adapted (even slightly) for a military purpose, or that may involve national security?</th>
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<tbody>
<tr>
<td>Yes</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>* c. Does the research involve technology or equipment with a strong potential dual-use (civilian and military) application listed on the Commerce Control List (CCL) under the Export Control Regulations (EAR)?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
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</table>
1. If you answer “Yes” to 2a. you need to specify which items the Lead PI plans to ship and to where.

2. Click “Save” after you answer all of the questions.
5.8 Intellectual Property

1. For the Intellectual Property section, follow the prompts.
2. If you answer “Yes” to number 1, you need to enter the title for UTRF file number.

3. Save your changes at the bottom of the page.
5.9 Community Benefits

This section only pertains to research or projects that involve community outreach and engagement. If the Lead PI’s project does not include this, then answer “No” or “Other/None” to all of the prompts.

1. If your project does include community outreach and engagement, follow the prompts and answer “Yes” when appropriate.

2. Save changes at the bottom of the page.
5.10 Location of Sponsored Activities

Indicate whether the Lead PI’s project activities will occur on-campus, in-state, out-of-state, or out-of-country.

1. For “On-Campus Locations,” if you type “C” in the drop-down it will pull up all UTC locations.
2. For each section, indicate the percent of time spent at each location. You can add locations within each section if the Lead PI will be breaking up his/her time between different areas.

### On-Campus Locations:

If any sponsored activities occur on campus, please enter below each on-campus location and the percentage of work that will be done there, and click Add.

Tip: The list is arranged alphabetically by campus/unit, beginning with Agriculture. To quickly get to the first location for a particular campus/unit, begin typing the first letter or two as follows: C for Chattanooga, K for Knoxville, MA for Martin, MC for Memorial Research Center in Knoxville, ME for Health Science Center, S for Space Institute, and U for UT Institute for Public Service.

<table>
<thead>
<tr>
<th>Location</th>
<th>Percent of Work</th>
</tr>
</thead>
<tbody>
<tr>
<td>CHAT-Administrative Services Building-50826000</td>
<td>50.00%</td>
</tr>
<tr>
<td>CHAT-540 McCollie Ave-50832500</td>
<td>50.00%</td>
</tr>
</tbody>
</table>

5.11 Proposal Abstract

Include the Lead PI’s abstract, which should detail the purpose of the study, the objectives, and the methods of the study.

1. Indicate whether UT users have permission to use this abstract in reports.

**Indicates Required Fields**

The abstract should be plainly written and in sufficient detail to summarize:

a. the purpose(s) or problem(s)
b. the hypothesis(es) or objective(s)
c. the method(s) of the project(s)

All abstracts in the database may be available to the public and may be used to facilitate collaborative studies and to run reports. The expertise and areas of research interests on the UT campuses. If this abstract contains ANY sponsor proprietary information, such as potentially patentable invention (i.e., a new and useful process, machine, article of manufacturing, composition of manufacture, or related done so, you should contact the UT Research Foundation for invention management assistance.

*1. I give permission for this abstract to be included in reports available to all UT users:

- [ ] Yes
- [ ] No
2. Copy and paste the abstract into the below field.

2. Abstract:

3. Indicate the area this research or project falls under by clicking the drop down button.

3. Please select a category that describes the type of research contained in this proposal:

   Select one...

4. Save changes at the bottom of the page.
5.12 Proposal Attachments

Attach all proposal documents at this time.

1. You can upload the Lead PI’s proposal documents by clicking “Choose File” and browsing your computer.

2. Select the document type using the drop down.

3. Click the “Add” button to add more documents.
4. You can choose “No Attachments” if needed.

5. Save changes at the bottom of the page.

5.13 Approving Units

1. Partnerships & Sponsored Programs will default as the approving unit. Leave this as is and add additional units if needed.

2. Click “Authorize Unit Listing.”

5.14 Submission Notes

If needed you can input additional information about the Lead PI’s proposal.
5.15 Submitting a Proposal

When you are done filling out all the required fields, click “Submit for Routing” on the left hand side. This submits the proposal to ORSP **NOT** the funder. ORSP and any other units noted in the “Approving Units” section will review and authorize the proposal.
6  Still Need Help

6.1  Contact Information

<table>
<thead>
<tr>
<th>Cayuse &amp; Proposal Questions</th>
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<tbody>
<tr>
<td>Office of Research &amp; Sponsored Programs</td>
</tr>
<tr>
<td>109 Race Hall</td>
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<tr>
<td>(423) 425-4052</td>
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<tr>
<td><a href="mailto:orsp@utc.edu">orsp@utc.edu</a></td>
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<thead>
<tr>
<th>Meredith Perry</th>
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<td>Executive Director</td>
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<tr>
<th>Sam Stanley</th>
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<tr>
<th>Angie Johnson</th>
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<tr>
<th>Todd Doman</th>
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<tr>
<th>Tracey Woodbury</th>
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<tr>
<th>Terri Bearbower</th>
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<tr>
<td>Office of Research Integrity</td>
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<tr>
<td>109 Race Hall</td>
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<td>(423) 425-4052</td>
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<td><a href="mailto:Lindsay-Pardue@utc.edu">Lindsay-Pardue@utc.edu</a></td>
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6.2  Additional Resources
Visit the ORSP website for additional tips and how-to’s.