PI Quick Guide to Cayuse / Evisions

TERA-PAMS has been replaced by the Cayuse / Evisions system. If you are familiar with PAMS, you will find Evisions is very similar. This document summarizes the main differences, and provides guidance on how to handle them.

CAYUSE URL FOR LOG IN
https://tennessee.cayuse424.com/

Log in to the system using your net id (e.g., abc123) and password. **NOTE:** Not all UTC employees are automatically included in Evisions -- if you cannot log in or cannot find a person you wish to add to a record, contact the Office of Research and Sponsored Programs ASAP for assistance.

START PAGE
After you log in, there are two choices; click on the one for **Cayuse SP**. (The other choice, **Cayuse 424**, is used for certain federal grant proposals -- the Office of Research and Sponsored Programs (ORSP) will take care of Cayuse 424 entries for you.)

GENERAL INFO PAGE (first page of the proposal entry)
- **Sponsor:** In PAMS, you could type in the name of a sponsor if it was not included in the database; that is not possible in Evisions. If, after searching, you cannot find the name of the sponsor, 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. (ORSP will work with Evisions to get the sponsor name added to the database, and correct the entry.)

- **Admin Unit:** **ALWAYS** Select Partnerships & Sponsored Programs as the Admin Unit. 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.

- **Primary Administrative Contact:** Select the P.I. as the Primary Administrative Contact. If you cannot find the person you wish to add, contact ORSP for assistance.

- **Submission Method:** Select the appropriate method from the drop down menu. If you are unsure, just select “other.” ORSP will make corrections if needed.

- **“Paired” vs. “Unpaired”:** At the bottom of the page are three radio buttons -- just ignore them. If anything needs to be done about them, ORSP will handle it for you.

INVESTIGATOR/RESEARCH TEAM PAGE
- **Not all UTC employees are automatically included in Evisions** -- if the search doesn’t locate the person you wish to add, contact the Office of Research and Sponsored Programs ASAP for assistance.
- **Required:** Person Months (how many months per year a person will work on the project). Some sponsors require this information, but many do not. You can enter a “0” here. This information will be included in the proposal and/or
budget attachments. If you are interested in more information, you can click on the hyperlink for an Excel spreadsheet.

- **Required**: Sponsored Effort % is required. You can enter “0.” This information will be included in the budget attachment.
- **Optional** (but requested): Cost Shared Effort %. You can enter “0.” This information will be included in the budget attachment.
- **Optional**: (but requested): Allocation of credit. Identify what percent of credit/recognition each person should have for the project.

### BUDGET PAGE

- **Overview Section**: The budget page defaults to “Summary” for the form and “1” for the # of periods – leave these items as the default. Enter the same dates for the “Current Period” as are entered for “Entire Project”

- **Cost Sharing Section**:  
  **Internal Cost Sharing**: 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.)

  **Third-Party Cost Sharing**: 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 (don’t break the amount into separate years, as we did in PAMS.) Use the “Comment” box to provide additional details on the cost sharing.

  If, after searching, 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. (ORSP will work with Evisions to get the sponsor name added to the database, and correct the entry.) (This is the same procedure you do on the General Information page, if the sponsor name is not listed in the database.)
• **F&A rate section** – Only one rate is needed (Evisions has room for three rates, to accommodate needs on the different UT campuses.) **Click on the top rate.**

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; choose the appropriate number (51% on campus, 16% off campus.)

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.

• **Budget Categories section** – Under “current period” enter the total direct costs for all years of the project and the total F&A base for all years (circled in red on the example below.) Evisions will calculate the remaining portions of the budget (circled in blue on the example below):

**SUBCONTRACTOR PAGE**

• **If the Subcontractor Is Not in the Database:** If, after searching, 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. (ORSP will work with Evisions to get the subcontractor name added to the database, and correct the entry.)

**COMMUNITY BENEFITS PAGE**

This new page was not present in PAMS. All questions must be answered; it is possible to choose “None” as an option.
On-Campus Locations: The database includes buildings on all UT campuses. To quickly get to the top of the UTC section of the list, type “C” in the search box.