OVERVIEW
The Electronic EPASS (Extramural Proposal Approval & Submission Summary) is an online system designed to facilitate EPASS creation and electronic routing of it for internal departmental approval.

ACCESS
New Fund Managers/MSOs/PIs will need to be added to the EPASS system in order to create/approve EPASSes. To request access to the system, email DOM DRA (domdra@mednet.ucla.edu):
- Full Name
- Email Address
- University ID #
- Division Name & Department Code
Setup can take 1-3 days.

***NOTE: EPASS will automatically logout users after ~ 5 minutes of inactivity. Remember to SAVE!

TO CREATE NEW EPASS:
1. Login with UCLA Logon ID http://epass.research.ucla.edu/Account/LogIn
2. Click “New Proposal”
3a. Fund Manager will default to the User but can be edited via drop down option.
3. Search and Select PI

a. List is pulled from EDB. If a PI does not show up in the list, i.e. PI still in process of transferring to UCLA, use the “Click here if PI is not on the list” option and manually complete. **Please note***

4. Enter Sponsor Due Date.

5. Click “Start” and complete all data fields within each tab, as per the general EPASS instructions. See screen shots of each tab below.
Proposal Identification

Proposal Title
Enter Title Here

Project Begin Date
4/7/2018

Project End Date
6/30/2023

Award / Proposal / Program Type

Award Type
Grant

Proposal Type
New

Program Type
Basic Org Research

Special Program Type
Select a special program type

If this EPASS relates to an existing Award or Master Agreement, select an Action Type:
Select an action type

Current Sponsor Award/ID #
N/A
NOTE: Enter Funding Opportunity Announcement (FOA) here
Proposal Checklist
PI: AGUIAR VALLUM, ELIZABETH JOANNA

Investigations | Department | Proposal | Types | Sponsor |
--- | --- | --- | --- | --- |

**PI Exception Required? (Check Requirements and Look-up Eligibility). If yes, attach approved form (Sample Approval Form).**
- Yes ☐ No ☐

On campus space?
- Yes ☐ No ☐
  - Building:
  - Location:
  - Room:

Off campus space?
- Yes ☐ No ☐
  - Location:

Outsourcing Agreements? If yes, provide entity names in Attachments Section, and attach Sub-recipient Commitment Form(s) or ERP Expanded Closeout Form (Subrecipient Letter(s) of Intent for each entity. PI signature indicates review and approval of cost reasonableness. (See Subaward Initiation and Management).
- Yes ☐ No ☐

Does this project involve activities outside the US or partnership with International Collaborators?
- Yes ☐ No ☐

Is any Cost Sharing/Matching proposed in this application? (Cash, unfunded effort, or in-kind contributions - do not include salary cap differential.)
- Yes ☐ No ☐
  - If yes, required by sponsor? ☐ Yes ☐ No ☐ (mandatory committed) ☐ No ☐ (voluntary committed)
  - Cost share amount:
  - Source/FAU #:

Is any unfunded effort proposed in this application? In accordance with UC Policy, "unfunded effort" must be reported in OR (Do not include salary cap differential here).
- Yes ☐ No ☐
  - Source/FAU #:

Do you anticipate program income?
- Yes ☐ No ☐
  - If yes, specify:

Does this proposal involve the use of significant IT resources (beyond basic academic infrastructure) or generation of datasets or digital assets; or a budget with over $15,000 in IT-related hardware, software, or staff expenditure? (Check additional requirements.)
- Yes ☐ No ☐
  - ITS #: __________

Human subjects?
- Yes ☐ No ☐
  - If yes, indicate "Pending" or IRB or Exemption #:
  - Delayed onset:

Are study-related patient care costs to be billed to the award or to a third party payer (i.e., medical insurance/Medicare)? If yes, then a Policy 913 Coverage Analysis is required (contact coverageanalysis@mednet.ucla.edu).
- Yes ☐ No ☐

Animal subjects?
- Yes ☐ No ☐
  - If yes, indicate "Pending" or ARCP: Pending ☐ Delayed onset:

Human Embryonic Stem Cell Research? If yes, refer to the Stem Cells Policy and Procedures.
- Yes ☐ No ☐

Non-UCLA materials/equipment to be used?
- Yes ☐ No ☐
  - If yes, indicate type:
  - Source:

Human or primate cells, tissue, or fluids; recombinant or synthetic nucleic acids; potentially infectious materials; exotic plants or plant pathogens; select agents or toxins? For more information, see Bioc website.
- Yes ☐ No ☐

Use of UC Intellectual Property?
- Yes ☐ No ☐
  - If yes, specify the case number:

Export Control (see ERP Website) – Does the project involve the following:
- Shipping or carrying any tangible object or item to a foreign country?
  - Yes ☐ No ☐
- Conducting research or other activities in, taking money to, or planning to have money transferred to a foreign country?
  - Yes ☐ No ☐
- Training foreign persons in using equipment, technology, or technical data?
  - Yes ☐ No ☐
- Traveling to or doing research in a country currently under a US Trade or Economic Embargo (see OFAC website)?
  - Yes ☐ No ☐
NOTE: Can only list one rate. If more than one rate is necessary, enter in Remarks section with details.
SYSTEM REVIEW FOR ERRORS
Click on the “Review” tab when all other tabs are complete. The system will complete an automatic error check and display errors. Errors must be rectified prior to routing for approvals. Please keep in mind the system does not catch all errors so review your EPASSes carefully.

REMEMBER TO SAVE
When making edits to the tabs, remember to click “Save” or “Save and next” before navigating to another tab otherwise changes will not be saved!

DOM APPROVAL ROUTING PROCESS
EPASSes are automatically set up to electronically route from PIs ➔ Co-Pls (if applicable) ➔ Division Chief ➔ DRA (Raellen or Cathy). You can print the EPASS at any time to obtain hard copy signatures, but electronic signatures must be consecutive in order to route electronically. Once all approvals have been obtained, the Preparer will receive an email that the EPASS is finalized. EPASS approvals should be obtained PRIOR to proposal submission.

See Exhibit A: Sample Approval Request Email. Exhibit B: Sample Final EPASS Email.
NOTE: Once all departmental approvals are obtained, the HARD COPY of the EPASS must still be EMAILED to the appropriate Central Office (OCGA, TDG, CTAO) for processing. It does NOT automatically get forwarded electronically to them!
6. Click “Proposals” to review EPASSes in various statuses. Actions that can be taken:
   a. Edit – make changes to the EPASS at any time
   b. Copy – make an exact copy of an EPASS minus obtained approvals
   c. Delete – permanently delete EPASSes in Pending status only. There is no way to retrieve deleted EPASSes so use with caution. Cannot delete EPASSes in statuses other than Pending status!

7. For those with Approver roles – PI, Division Chief, DRA – click “Signatures” to view pending and completed EPASSes.