

# ELECTRONIC PROPOSAL SUBMISSION ACCESS

*Revised July 15, 2016*

## **TYPES OF PROPOSAL ACCESS**

1. NIH eRA Commons Accounts
2. S2S/Cayuse (page 2)
  - a. Professional Profile
  - b. User Access/Account
  - c. Institutional Profile

Reference the last page of "[Software Programs All Fund Managers Should Have Installed on Their Computers](#)" chapter in the DOM Fund Manager's manual for an additional list of login IDs fund managers need to establish.

System	Access/Account Type	ACCESS GRANTED BY...			INFORMATION REQUIRED TO OBTAIN ACCESS					
		OCGA System Admin	DOM DRA	Fund Manager	Full Name	Email Address	University ID #	Commons ID	Institution Profile Form	Commons User Role
NIH eRA Commons	PI Logon		X		X	X				X
	Postdoc Logon		X		X	X				X
	FM/Assistant Logon		X		X	X				X
S2S	Professional Profile			X	X	X	X	X		
	User Account/Access		X		X	X	X			
	Institutional Profile	X							X	

## **NIH eRA COMMONS ACCOUNTS**

Email DOM DRA ([domdra@mednet.ucla.edu](mailto:domdra@mednet.ucla.edu)) to request access. Provide required information in email:

1. Full Name
2. Email Address
3. eRA Commons User Role - [https://era.nih.gov/files/eRA\\_Commons\\_Roles.pdf](https://era.nih.gov/files/eRA_Commons_Roles.pdf)
  - Most frequently requested:
    - PI
    - Assistant (ASST)
    - Postdoc
    - Trainee
    - Undergraduate Student

**PRINCIPAL INVESTIGATORS:** PI access required for PI's to submit NIH grants.gov proposals and/or RPPR Progress Reports, to access the Commons PDF of submitted proposals, check status of proposals, input JIT information and update Commons Profile. PI's that have transferred from another Institution must have their profiles linked to UCLA.

**FUND MANAGERS:** Commons logon required for FM to assist in preparation of RPPRs & updating PI's eRA Commons profile. Each individual PI needs to designate "Assistant" access to his/her FM.

**SCHOLARS:** As of 10/01/09, all individuals with postdoctoral/graduate/undergraduate student roles who participate on a project for at least one person month are required to have an eRA Commons ID.

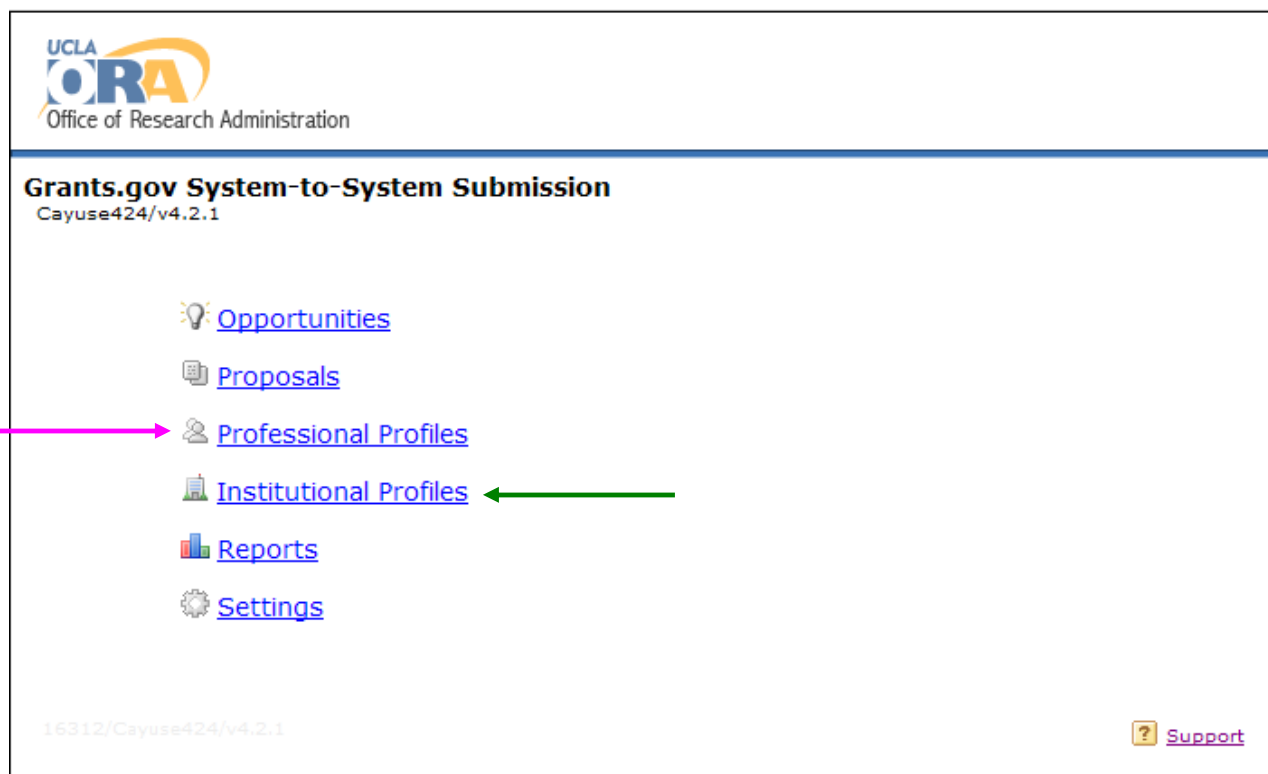
## S2S/CAYUSE

This section focuses on how to obtain ACCESS to or create PROFILES in S2S. For more detailed instructions on how to *use/navigate* through S2S:

1. Familiarize yourself with the online Training Guide - <http://www.research.ucla.edu/ocga/S2SGrantsInfo/index.htm>
2. Attend the DOM Cayuse/S2s Proposal Preparation Fund Manager Training Session offered twice a year. <http://medschool.ucla.edu/workfiles/Site-ORA/fundmgmttraining/Fund-Manager-Training-Schedule.pdf>
3. Contact Raellen Man, x58112 / [rman@mednet.ucla.edu](mailto:rman@mednet.ucla.edu) or Cathy Rujanuruks, x66287 / [crujanuruks@mednet.ucla.edu](mailto:crujanuruks@mednet.ucla.edu) to set up a 1:1 training time.

For additional information regarding access and getting started with S2S


[http://www.research.ucla.edu/ocga/S2SGrantsInfo/doc/Business\\_Processes\\_REV\\_10-3-12.pdf](http://www.research.ucla.edu/ocga/S2SGrantsInfo/doc/Business_Processes_REV_10-3-12.pdf)

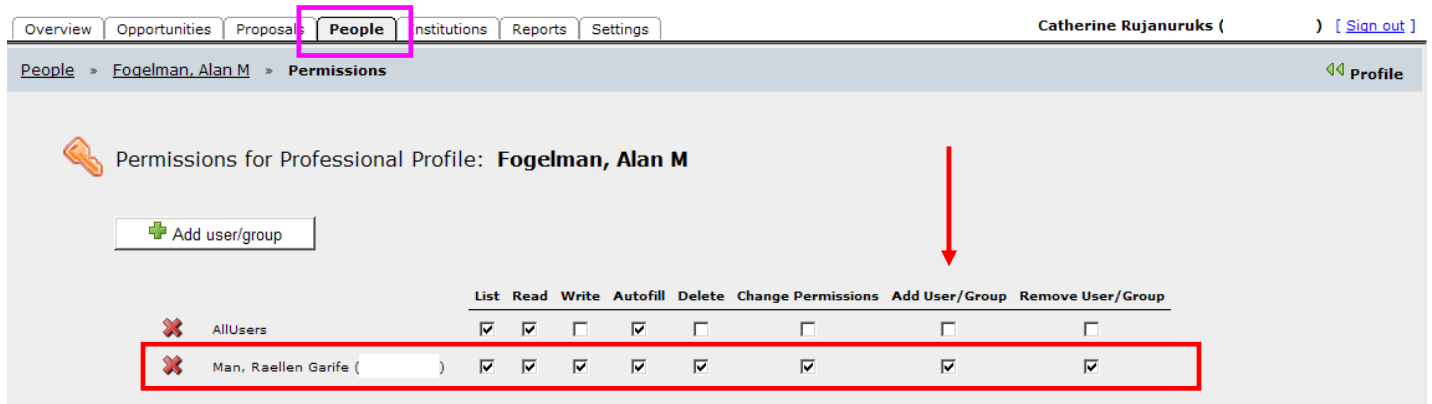


### S2S/Cayuse Professional Profile

- **PURPOSE:** Allows UCLA personnel to be named in a proposal as senior/key personnel.
  - Do **NOT** create professional profiles for Non-UCLA staff/faculty.
  - Instead use the “Non-UCLA PI #1-23” profiles under “N” that has been pre-established.
- Pre-requisite for User Access/Accounts.
  - Be sure a Professional Profile exists for any individual who needs USER access to S2S, i.e. PI, staff, fund manager, or PI assistant.
  - Profile must be COMPLETELY set up in S2S PRIOR to User Access request.



### Who can set up a Professional Profile?

- Anyone who already has User Access to S2S, preferably a Fund Manager, MSO or other Administrative personnel familiar with the S2S system.
- What if there is already a Profile set up for a PI in *your* Division but you cannot make any changes?
  - This indicates another fund manager on campus has already established a Profile for your PI because your PI was listed as senior/key personnel on their proposal prior.
  - How to obtain access to edit your PI's Profile information:
    - Click on the PI's Profile
    - Click on the orange key  in the upper right-hand corner to view Permissions
    - Contact the person with "Add User/Group" access & ask them to give you full access
    - OR contact DOM DRA ([domdra@mednet.ucla.edu](mailto:domdra@mednet.ucla.edu)) to request access




Permissions for Professional Profile: **Fogelman, Alan M**

[Add user/group](#)

	List	Read	Write	Autofill	Delete	Change Permissions	Add User/Group	Remove User/Group
 AllUsers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
 Man, Raellen Garife ( )	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

### How to set up a Professional Profile?

1. Click on People tab or Professional Profile link after logging into S2S.
2. Search for individual you want to add to ensure a profile doesn't already exist.
3. Click on the green plus sign  Person button (top, center) to create a brand new profile.
4. Every single section, except Bioskeches & salary amount, must be thoroughly completed for *both* Admin *and* PI/Staff.
5. Hints & Tips
  - a. If individual will be a PI or Postdoc on an NIH grant, s/he must have a NIH Commons ID entered (see above "eRA Commons Accounts")
  - b. Institutional Association link with Regents of the University of California, Los Angeles.
  - c. Contact Info – ensure you use the 9 digit zip code format – 90095-1736
    - i. For 90095 – the last 4 digits should match the 1<sup>st</sup> 4 digits of person's [UCLA mail code](#)
    - ii. For non-90095 – the last 4 digits should can be located on [USPS.com](#)
  - d. Salary & Fringe Worksheet
    - i. Enter "12" under calendar months (if individual has a 12 month appointment)
    - ii. Import the Institutional fringe rate
  - e. Performance Site –check the active button & "Fill from Contact Info"
    - i. Org Name for all DOM personnel should be "UCLA David Geffen School of Medicine/Division Name"
    - ii. Save all data entered thus far by clicking on the floppy disk icon.
    - iii. Ensure your contact info is complete and accurate prior to "Filling from Contact Info"
    - iv. DUNS = 092530369
    - v. Congressional District = CA-033

### **S2S/Cayuse User Access/Account**

- PURPOSE: Allows a person the ability to log into S2S and prepare and/or review a grants.gov proposal online.
- This person can range from a PI, academics, research staff, Administrative Assistants to Fund Managers. Non-UCLA employees may not be granted access.
- Not all individuals with Professional Profiles need to have User Access/Accounts; but all Users must have a Professional Profile in S2S.
- Each User must have a UCLA Logon (formerly known as Bruin ID logon).
  - If s/he doesn't already have one or has forgotten his/her logon or password, go to <https://logon.ucla.edu/>. S/he must have his/her 9-digit University ID # to access this site.

### **How to obtain a User Account/Access?**

- *After* creating and fully completing the Professional Profile, send an email to DOM DRA ([domdra@mednet.ucla.edu](mailto:domdra@mednet.ucla.edu)) with the following information for the new User:
  1. First Name
  2. Last Name
  3. Email Address
  4. 9-digit University ID
- Only a S2S Grants System Administrator can set up User Accounts. Account set up is generally within 24 hours of receipt. Confirmation of account set up will be sent by the System Administrator [s2sgrants@research.ucla.edu](mailto:s2sgrants@research.ucla.edu) to the User directly.

### **S2S/Cayuse Institutional Profile**

- Institutional Profiles need to be set up for each subawardee listed in DETAILED budget only.
- Institutions listed in Modular budgets do NOT need an Institutional Profile set up.

### **How to set up an Institutional Profile?**

1. Click on Institutions tab or Institutional Profile link after logging into S2S.
2. Search for Institution you want to add to ensure it doesn't already have a profile set up.
3. If not, have the subwardee complete and return the "Request for Institutional Profile" form. <http://www.research.ucla.edu/ocga/S2SGrantsInfo/doc/Institutional%20Profile%20Request%20-%20BLANK.pdf>
4. Review form for completeness & submit to the S2S System Administrator at [s2sgrants@research.ucla.edu](mailto:s2sgrants@research.ucla.edu)
5. The S2S System Administrator will notify the requestor via email once the profile has been created, usually within 24 hours of request.