

DEPARTMENT OF MEDICINE AIS SYSTEM ACCESS REQUEST

- ✓ User *must* have an email account before the request can be processed
- ✓ All training must be complete before the user can become a preparer/reviewer
- ✓ SUBMIT ONLINE AIS FORMS TO: gzarenia@mednet.ucla.edu (Clinical) DOM_DSA@mednet.ucla.edu (Non-Clinical)

Name:	Date:
AIS Logon ID:	Phone:
Title:	UCLA UID:
MSO Name:	Phone:
Division:	ACCESS REQUEST TYPE: <input type="checkbox"/> NEW <input type="checkbox"/> UPDATE <input type="checkbox"/> DELETE

MSO	Date	Farah Elahi COO	Yanina Venegas Executive Director	Date
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EXPLANATION FOR ACCESS REQUEST (REQUIRED)

System Access Request (SAR)
<input type="checkbox"/> Financial Systems QDB
<input type="checkbox"/> Student Financial Aid Management (ZFAM)
<input type="checkbox"/> DSA Inquiry (CL001)

UCPATH ACCESS	Initiator	Approver	Inquiry
Human Capital Management (HCM)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pay Administrator (PA)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
General Ledger (GL)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Dept. Code:

PAYROLL / EDB SYSTEM ACCESS	EFFORT REPORTING SYSTEM
Dept Code:	Dept Code:
<input type="checkbox"/> 1) CDW UCPATH Inquiry	<input type="checkbox"/> 11) View Only
<input type="checkbox"/> 2) EDB Documents	<input type="checkbox"/> 12) View and Edit
<input type="checkbox"/> 3) SYS Admin Dept. Access Campus-wide	<input type="checkbox"/> 13) Certifier
<input type="checkbox"/> 4) EDB - IPAY Inquiry	<input type="checkbox"/> 14) View Payroll Information in ERS
<input type="checkbox"/> 5) Online UPAY Preparer	<input type="checkbox"/> 15) Coordinator – receives notifications
<input type="checkbox"/> 6) History Record Inquiry	FINANCIAL SYSTEM ACCESS
<input type="checkbox"/> 7) History Personnel Reporting	<input type="checkbox"/> 16) UCLA TABLES: Definition Inquiry Campus-wide
<input type="checkbox"/> 8) History Documents	<input type="checkbox"/> 17) TOF Preparer/Inquiry Campus-wide
<input type="checkbox"/> 9) Employment Verification	<input type="checkbox"/> 18) Admin. Cashiering Inquiry
<input type="checkbox"/> 10a) DDI Online Access (print PPP Ledgers)	<input type="checkbox"/> 19) Admin. Cashiering Update
<input type="checkbox"/> 10b) DDI Online Access (print Gen. Ledgers)	<input type="checkbox"/> 20) PAR Reports (DDI Online)

Online Recharge Request – Preparer Access	Dept Code:
<input type="checkbox"/> 21) Recharge Order Requests (FSRORP)	FAU:
<input type="checkbox"/> 22) Interdepartmental Recharge Preparer (FSRCHGP)	Complete On-Line Recharge Access Application
<input type="checkbox"/> 23) Blood Donation Recharge Requests	FAU:

PAN REVIEWER		26 and 27 are global "keys" to PAN inbox. Each reviewer needs these functions, but only once.		
<input type="checkbox"/> 24) NON-PAYROLL (EA001) Campus-wide				
<input type="checkbox"/> 25) EDB PAYROLL (EA002) By Dept Code				
<input type="checkbox"/> 26) Payroll (EDB/PPP) All payroll activity Mandatory Reviewer: <input type="checkbox"/> YES <input type="checkbox"/> NO		Provide all details beyond Dept code in the explanation section.		
<input type="checkbox"/> 27) PPP-TRF (UPAY) Mandatory Reviewer: <input type="checkbox"/> YES <input type="checkbox"/> NO				
<input type="checkbox"/> 28) Budgetary (TOF) Mandatory Reviewer: <input type="checkbox"/> YES <input type="checkbox"/> NO		Account	CC	Fund
<input type="checkbox"/> 29) Dept. Deposits Application (DDF) Mandatory Reviewer: <input type="checkbox"/> YES <input type="checkbox"/> NO				
<input type="checkbox"/> 30) Online NPEAR (FSN) Mandatory Reviewer: <input type="checkbox"/> YES <input type="checkbox"/> NO				
<input type="checkbox"/> 31) PUR (Purchasing) Mandatory Reviewer: <input type="checkbox"/> YES <input type="checkbox"/> NO				
<input type="checkbox"/> 32) ROR (Recharge Order Request Review) Mandatory Reviewer: <input type="checkbox"/> YES <input type="checkbox"/> NO				
<input type="checkbox"/> 33) FSR (Recharge Orders Posted) Mandatory Reviewer: <input type="checkbox"/> YES <input type="checkbox"/> NO				
<input type="checkbox"/> 34) EQM (Equipment Management Reviewer) Mandatory Reviewer: <input type="checkbox"/> YES <input type="checkbox"/> NO				

PURCHASING (Bruin Buy)	Dept Code:			
<input type="checkbox"/> 35) PAC PREPARER: MAX LIMIT AMOUNT: \$___ <i>You MUST provide a limit. Current possible maximum is \$200,000 for fund managers.</i>	Account	CC	Fund	Sub/Object
The following only need to be added ONCE				
<input type="checkbox"/> 36) Queue Processing Campus-wide				
<input type="checkbox"/> 37) Supervisory function Campus-wide				
<input type="checkbox"/> 38) Receiving Campus-wide				
<input type="checkbox"/> 39) Inquiry by Dept. Campus-wide				
<input type="checkbox"/> 40) Inquiry by Fund Campus-wide				

MISCELLANEOUS FUNCTIONS	May be limited to:	
<input type="checkbox"/> 41) CTS Service Requester	FAU:	
<input type="checkbox"/> 42) CTS Request Reviewer	FAU:	
<input type="checkbox"/> 43) CTS Bill Inquiry	FAU:	
<input type="checkbox"/> 44) Non-PEAR Preparer	Dept Code:	FAU:
<input type="checkbox"/> 45) Non-PEAR Inquiry	Dept Code:	
<input type="checkbox"/> 46) MTF Requester	Dept Code:	FAU:
<input type="checkbox"/> 47) MTF Reviewer	Dept Code:	FAU:
<input type="checkbox"/> 48) Courtesy Guest Permits Access (TSREQ)	FAU (Unrestricted) :	
<input type="checkbox"/> 49) Travel Express Proxy	Dept Code:	Traveler UID #:
<input type="checkbox"/> 50) Travel Express Approver	Dept Code:	FAU:
<input type="checkbox"/> 51) Student Billing Update	Dept Code:	
<input type="checkbox"/> 52) Student Billing Inquiry Campus-wide	No detailed access possible	
<input type="checkbox"/> 53) Resch Admin Fin Management Repts Inquiry.	Dept Code:	
<input type="checkbox"/> 54) iShip	Dept Code:	FAU:

For more information:

AIS: <https://www.it.ucla.edu/>ERS: <http://efm.ucla.edu/WhatIsERS.htm>

Research Administration – Fund Manager Specific Access

<https://medschool.ucla.edu/workfiles/Site-ORA/referencematerials/AccessMatrix.xlsx>

Full Name:	
University/Bruin ID:	
Phone Number:	
AIS Logon ID:	
Department Code:	
Business Email:	

FINANCIALS

**click on hyperlink for an overview of each system. 1st bullet point provides a short definition of each system.*

OnCore

- *Clinical Trials Management System – maintains & manages planning, performing & reporting functions at the study & subject level along with participant contact information, tracking details & milestones.*
- Provide list of PIs with clinical trials
- Must complete OnCore training for associated fund manager role. Normally: RSCH160 + either RSCH215 (non-HemOnc) or RSCH216 (HemOnc only).

PAMS

- *PAMS allows fund managers to communicate the status of financial activities & financial deliverables.*
- Provide list of assigned PIs, if applicable
- Complete New User Activation Form

UCPath

- *System that integrates and aligns payroll, benefits, & transaction processing, including funding changes & direct retros.*
- Must complete all 9 General Ledger – Initiator (GL-I) training courses
 - Include LMS transcript of required training

ORA Online Resource Center (Portal)

- *Single point of access to research related information & resources.*
- Access will be granted for Subdivision Code 2223 (all of DOM)

Dean's Office FPM (Financial Projection Module)

- *Application which captures financial information from the central campus data base to display the chart of accounts & serve as a means to modify projected balances on funds.*
- Requires PPDDBINQ access first for payroll and CDW reports.

PROPOSALS/AWARDS

EPASS

- *Online system designed to facilitate EPASS creation & electronic routing for internal dept. approval.*

NIH eRA Commons

- *Online interface to access & share administrative information relating to NIH research grants.*

Cayuse/S2S User

- *Web-based alternative for preparing, validating, & submitting proposals via Grants.gov.*
- You or another fund manager must set up Professional Profile in S2S prior to granting User Access