S2S Grants (Cayuse) Business Processes & Procedures Handbook

Revised: May 20, 2019
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Requesting System Access

- New user accounts can only be created by a S2S Grants System Administrator in ORA.
- To request system access, a new user should first contact the research administration business office for his/her home department/unit (“the department”).
- The new user will need to provide the department with his/her nine-digit UID.
- Upon receipt of the request, the department will first verify whether the new user already has a Professional Profile established in the system. If the new user does not have one, the department should create one and complete the information. (Refer to the Professional Profiles section for assistance with this task.)

**Users will not be granted system access if the Professional Profile is missing or incomplete.**

- Once the new user’s Professional Profile has been established or verified, the department should email the System Administrator(s) at erahelp@research.ucla.edu with the following information for the new user:
  - First Name
  - Last Name
  - Email Address
  - 9-digit UID

  (NOTE: If the UID is incorrect, the UCLA Logon ID will not work).
- The System Administrator will notify the new user and the department once the request has been completed, generally within one business day of receipt.

**Hints & Tips:**

- Being able to successfully access S2S Grants is contingent on having both: 1) an active S2S Grants user account AND, 2) a UCLA Logon ID.

- S2S Grants utilizes UCLA’s Single Sign-On authentication, which means that users must log in with their existing UCLA Login ID (formerly Bruin Online [BOL] account) and password.

- If a new user does not have a UCLA Logon ID and needs to create one, has forgotten it, or needs to re-set the password, direct him/her to: [http://logon.ucla.edu](http://logon.ucla.edu).
Getting Started

- S2S Grants is a web-based application. It can be accessed with various web browsers on either Windows or Macintosh systems.

**Windows**
- Recent versions of Firefox, Chrome, or Internet Explorer 11.
- Provisional support for Microsoft Edge.

**Macintosh**
- Provisional support for recent versions of Chrome and Safari.

- A few browser configurations are required. The main items are:

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<table>
<thead>
<tr>
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<tbody>
<tr>
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<td>Cookies</td>
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<tr>
<td>Pop-ups</td>
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</table>

- Cookies and pop-ups can be configured on a site-by-site basis. Consult with your departmental IT staff for policies specific to your department and/or assistance with browser configuration.

- The URL for S2S Grants is [s2sgrants.research.ucla.edu](http://s2sgrants.research.ucla.edu). The following homepage will appear:
Professional Profiles
Creating Professional Profiles

- All S2S Grants users have the ability to create Professional Profiles.
- Before creating a new profile, verify that one does not already exist in the system.
- Professional Profiles should be created for UCLA Key Personnel and S2S Grants system users only.
  - Professional Profiles should NOT be created for non-UCLA personnel such as subaward personnel, consultants, etc. When adding non-UCLA personnel to a proposal, use a “Non-UCLA, PI” skeleton profile (found under “N”) to autofill the proposal, then overwrite/complete with actual information.
- Professional Profiles should be created prior to requesting S2S Grants system access for any new users.
- When a Professional Profile is created, full permissions are automatically granted to the creator.
- Grant explicit access to the Professional Profile for any additional users who have reason to edit or modify the information contained in the profile. This may include the PI, for whom the profile was created, or other departmental personnel responsible for proposal preparation. It is strongly recommended that at least two administrators have Edit access to all Professional Profiles for their department/unit to ensure that access is available at all times.
  - NOTE: Professional Profiles should be reviewed periodically to ensure that both permissions and data are current.
- The following information should be completed when creating a new Professional Profile (chart on page 6 shows required fields for PI and Assistant accounts):
  - Name
    - Full Name with Prefix and Suffix
    - NIH Commons ID field, if applicable.
      - Double-check and ensure this is entered correctly. Failure to do so may result in a fatal submission error.
    - NASA NSPIRES ID, if applicable.
  - Degrees (required for NIH)
    - NSF Degree type (not required – NSF captures this information from Research.gov)
    - Degree Year (not required – NSF captures this information from Research.gov)
  - Demographics (required)
  - Institutional Association
    - Associate with The Regents of University of California, Los Angeles – UCLA profile.
Contact Info

- **Important Note:** zip codes must be entered using the zip+4 format. Failure to do so will result in a Grants.gov validation error when the information is autofilled into a proposal.
- When creating a new profile, the zip defaults to the institutional zip code (90095-1406). This is the zip code for OCGA and should be changed to the appropriate departmental zip code.

eRA Role

- If faculty, NRSA fellowship applicant, or other researcher, select “Principal Investigator.” This is especially important. If the eRA is not indicated for the PI, his/her name will not appear in the PI list at initial proposal creation.
- For departmental administrators/fund managers, select “Assistant”.

Department/Division/Title

- Fill in Department Name (title) and Code.
- Fill in Division if applicable.
- Fill in Position/Title (job/working title).
- For investigators who submit to NASA, see questions related to employment.

Salary and Fringe Worksheet

- Do not enter the Employee ID.
- For the Appointment Type - Months, enter either Calendar OR Academic and Summer, but not all three.
- Do not enter the Appointment Type – Salary.
- Import the Institutional Rates and select the appropriate composite benefit rate(s).

Performance Site

- This represents the location where PI generally conducts their research.
- To enable autofill functionality, ensure the Active box is checked.
- Users may either enter the information manually, or click “Fill from Contact Info.”
- The UCLA DUNS Number is: 092530369
- The proper format for Congressional Districts is: Two-letter State Abbreviation-###
  
  Example: CA-033 for California Congressional District 33
- Zip codes must be entered using the zip+4 format. Failure to do so will result in a Grants.gov validation error when the information is autofilled into a proposal.

**Requesting Access to Other Profiles**

- Should a user require access to a profile (beyond the default List, Read and Autofill), s/he should click the Quick Info icon to obtain a list of users that can add permissions to the profile.
- Contact any of the users listed to request full access to profile.
Hints & Tips:

- Professional Profiles should be created for UCLA Key Personnel and S2S Grants system users only.
- Faculty/investigators should have the eRA role of “Principal Investigator” indicated on their profile, otherwise they will not appear in the PI list during proposal creation.
- While not explicitly stated in the Permissions screen, all users are automatically granted the following permissions to Professional Profiles: List, Read, and Autofill (not the same as Edit).
- Before creating a new profile, verify that one does not already exist in the system.
  - The system has some ability to detect and block creation of duplicate profiles. If you receive a duplicate profile warning, send e-mail to erahelp@research.ucla.edu.

Refer to Training Module 3 for more detail on this topic.
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Institutional Profiles

UCLA Profile

- A single Institutional Profile, The Regents of the University of California, Los Angeles - UCLA, will be used for all proposals prepared in S2S Grants.
  - This Institutional Profile should be used to associate Professional Profiles for all UCLA personnel.
  - This Institutional Profile should be used to populate the Application Organization information.

Subaward Profiles

- An Institutional Profile will need to be created for each subaward institution unless the “subaward” forms will be created by importing subaward information into the S2S Grants System.
- Users should view the Institutions list or autofill drop-down selection menu to see if a profile already exists before requesting one to be created.
- Institutional Profiles can only be set-up by the System Administrator (generally within 48 business hours of receipt).
- To set up an Institutional Profile for your subaward, download the “Request for Institutional Profile” form available on the OCGA S2S Grants website, send it to your subaward institution contact to complete and return to you. Review the form for completeness and submit it to the System Administrator at erahelp@research.ucla.edu.
- The System Administrator will notify the requester via email once the profile has been created.

Hints & Tips:

- Refer to the sample Institutional Profile form on the OCGA S2S Grants website for complete instructions.
- The DUNS number is required for an Institutional Profile to be created in the system regardless of the type of institution (domestic, foreign, non-profit, for-profit).
- The zip-code must be expressed in the zip+4 format.
- Incomplete or incorrect Institutional Profile requests will be returned to the requester and will delay creation of new Institutional Profiles.
- An Institutional Profile is not required for imported subawards.
Preparing a Proposal

Creating a Proposal

- To initiate a new proposal, check to see if the opportunity is already in the system. If not, pull and update the Opportunity List from the Institutions tab.

- When more than one opportunity shares the same RFA number, users should be careful to select the correct one from the list by checking the Comp ID number.

- Verify that the PI has a professional profile in the system. If not, create one for him/her and indicate “Principal Investigator” for his/her eRA role.

- Upon creating the proposal, enter the Proposal Name in the designated format:

  Reviewer Initials, PI Last Name, Opportunity Number, and any other identifiers you wish to include.

  Example: ERG, Bruin, PA-07-070, Cancer grant R01

- The reviewer should be the user’s OCGA signing official or Departmental Research Associate (DRA).

- Enter the Proposal Deadline on the Proposal Summary page. This, along with the proposal naming convention, is especially important as it is displayed on the master Proposals List.

- At set-up, users should also grant the appropriate individuals (e.g., PI, PI assistant, fellow fund managers) access to the proposal. The type of access granted to other users is up to the proposal preparer’s discretion.

- The Department and Division fields in Item #5 on the SF424 Cover Page are NOT autofilled. These fields should be left blank.

- The Organization Name field on the Performance Sites page will be autofilled from the PI Professional Profile, but may be overwritten.

- Upload completed internal documents (e.g., EPASS, COI, PI Exception Letter, Subaward forms, etc.) to the Supporting Documents form of the proposal.

Hints & Tips:

- Remember to follow the proposal naming convention and enter the deadline date on the Summary page, as this will assist reviewers in identifying proposals requiring attention.

  Refer to Training Modules 5, 6 and 7 for more detail on this topic.
Reviewing and Submitting a Proposal

- PIs may review proposals by logging into S2S Grants or by requesting a PDF the proposal preparer, or any other user with access to the proposal.

- When creating a PDF of the proposal (using the Print icon in the top right hand corner of the proposal), users should only select the “select included forms” option to produce a copy of only those forms which are submitted to the sponsor.

- Once the PI has completed review of the proposal and the necessary internal documents are uploaded to Supporting Documents, the proposal is ready for routing to Proposal Intake (see [http://ora.research.ucla.edu/OCGA/Documents/Proposal-Preparation/how-to-submit-proposal.pdf](http://ora.research.ucla.edu/OCGA/Documents/Proposal-Preparation/how-to-submit-proposal.pdf)).

- Once the proposal has been successfully submitted, the signing official will notify the PI and proposal preparer. Any users with permissions to the proposal can then track the Grants.gov status under the “Proposal Submission History” in the Electronic Submission section of the proposal.

- If a signing official encounters any transmittal errors during the submission process, he/she should contact erahelp@research.ucla.edu immediately.