



4/22/2021

electronic Research Administration (eRA)

Class Workbook



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TRAINING OFFICER
SPONSORED PROGRAMS, OFFICE OF RESEARCH
UNIVERSITY OF CALIFORNIA, DAVIS

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Activity 1: Entering an IPF in Cayuse SP

1. For step-by-step guidance, you can refer to the Handbook for Department Contract & Grant Staff, Principal Investigators and Approvers (<https://research.ucdavis.edu/wp-content/uploads/End-users-v13.pdf>)
2. Read the scenario below.
3. Create a Proposal/IPF in Cayuse SP based on the scenario
 - a. Login to: **http://ucdavis-uat.cayuse424.com** (copy and paste this address in your browser – Firefox recommended)
 - i. Username: amieadmin
 - ii. Password: training
 - iii. Select “Cayuse SP”.
 - iv. Select “Start New Proposal”.
 - b. Enter all possible info on the first page, select “Save”, then continue adding as much information as you can to each section tabbed in the left column.
 - c. The goal of this activity is to get green checkmarks next to all the categories in the left column.
 - i. Don’t worry if you can’t get to all the checks in the time allotted.
 - ii. **Do not “Submit for Routing” yet**
4. After creating the Proposal/IPF, note the Proposal # as you will need it for Activity 3.

Scenario

Professor Charlie Apple is submitting a basic research application to NIH NIAID PA-EO-777 (R01) through Cayuse 424. The proposal is due 7 business days from today at 5:00 pm local time. The proposed start date is January 1, 2022 and end on December 31, 2023, with one-year budget periods. The assigned administrator will be Amie Admin. The administering unit of the project is Intl Med- Infectious Disease (049231). The project title is “Socio-ecological factors in Malaria transmission.”

Project Senior Personnel:

- Professor Charlie Apple, Lead PI: 3% Effort; 0.36 Person Months
 - 12-month (Calendar) Appointment
 - Unit: Intl Med- Infectious Disease (049231), Allocation of Credit: 50%
- Professor Kassie Obelleiro, co-Investigator: 3% Effort; 0.36 Person Months
 - 12-month (Calendar) Appointment
 - Unit: Intl Med- Infectious Disease (049231), Allocation of Credit: 50%
- Amie Admin, Proposal Editor: 0% Effort, 0 Person Months

The budget for the project is below.

Line Item	Year 1	Year 2	Total Project
Salary for Charlie Apple, PI – 3% Effort, 0.36 Person Months (\$150,000 Calendar salary)	\$4,500	\$4,500	\$9,000
Salary for Kassie Obelleiro, co-Investigator – 3% Effort, 0.36 Person-Months (\$130,000 Calendar salary)	\$3,900	\$3,900	\$7,800
Salary Total	\$8,400	\$8,400	\$16,800
Charlie Apple, PI	\$1,148	\$1,148	\$2,290
Kassie Obelleiro, co-PI	\$ 995	\$ 995	\$1,990
Benefits Total	\$2,143	\$2,143	\$4,286
PERSONNEL TOTAL	\$10,453	\$10,453	\$12,086
MRI	\$25,000	\$ 0	\$25,000
EQUIPMENT TOTAL	\$25,000	\$ 0	\$25,000

TOTAL DIRECT COSTS	\$35,543	\$10,543	\$46,086
Indirect Cost Base	\$10,543	\$10,543	\$21,086
Indirect Costs (Rate 57%)	\$6,010	\$6,010	\$12,020
TOTAL PROJECT COSTS	\$41,553	\$16,553	\$58,106

The work will involve both human subjects and vertebrate animals (cows/bovine). The IRB application numbers are 123456, 236589 and both were approved on 12/10/2020. The IACUC protocol is 235678 and was approved on 11/1/2020. Since the project will be studying malaria, it also involves biohazardous materials. There is no potential military application or export control implications.

25% of the work will take place in the Animal Husbandry Beef Barn on campus, 25% will occur in the Ellison Building, 50% will occur in the Social Sciences and Humanities Building on campus.

My abstract should be “publicly” accessible. My abstract is: I will study the socio-ecological factors in how cows effect malaria transmission in humans.

I will provide the Scope of Work and additional materials for the Budget and Budget Justification for you to upload tomorrow.

Activity 2: Find and Update or Create a Professional Profile in Cayuse 424

Login to Cayuse as yourself (Actual Cayuse, not UAT): <https://ucdavis.cayuse424.com> (copy and paste into your browser – Firefox recommended)

Select “Cayuse 424”

- A. Find Your Professional Profile:
 1. Select “People”.
 2. Change the Institution to “The Regents of the University of California (Davis) – UC Davis”.
 3. Enter your last name in the text field.
 4. Select “Search”.
 5. Select your name if it is on the list and skip to B.2. If your name is not listed, let us know.
- B. Create or Update a Professional Profile:
 1. To create a Profile:
 - i. Select “+ Person”.
 - ii. Enter the name (include the middle initial or name, if applicable) and select “Create New Profile”.
 - iii. Select “+” next to Institutional Associations.
 - iv. Find name of institution and select “Create Institutional Association”
 2. Continue completing the new Profile or Update your existing Profile:
 - i. Review to ensure all tabs have correct information
 - ii. Contact Info
 - iii. eRA Role
 1. Principal Investigator: Anyone that would be added as Personnel in Cayuse 424
 2. Assistant: Anyone assisting with proposal preparation or needing access to proposals in Cayuse 424
 3. Other roles are for SPO only
 - iv. Dept/Division/Title: Unit Code for the unit associated with contracts and grants
 - v. Salary and Fringe Worksheet: Employee ID, Appointment Information (Annualized Salary), Fringe Benefit Rate
 - vi. Performance Site: Location where most of the PI’s work takes place
 3. Select the Save icon on the toolbar next to your name.

Renaming a Cayuse 424 Professional Profile

It is important for a person’s Cayuse 424 Professional Profile to be saved under the name used for contracts and grants.

To change a name:

1. Find and select the relevant Professional Profile.
2. Select “Rename” (top right of right box).
3. Make the needed revisions.
4. Select “Rename Profile”.

Activity 3: Prepare an Application in Cayuse 424

1. Use the scenario below to create an application for submission in Cayuse 424. The scenario is the same as in Activity 1.
 - a. Login to: <http://ucdavis-uat.cayuse424.com> (copy and paste this address in your browser – Firefox recommended)
 - i. Username: amieadmin
 - ii. Password: training
 - b. Select “Cayuse 424”.
 - c. Find the funding opportunity (PA-EO-777 (R01)) and select the “+” sign to the left.
 - i. “Proposal Name” combines the Cayuse SP Proposal # from Activity 1, the PI’s last name and the funding opportunity number (“PA-EO-777 (R01)”)
 - d. Once you select “Create Proposal” go through the IPF to add as much information as you can.
 - i. “Person to be contacted on matters involving this application”: Enter your info (this section is for the SPO analyst overseeing the submission)

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Learning Objectives

- Understand the **general rules** of using eRA systems
- Know **what eRA systems** are available
- Understand **when to use an eRA system and which system** to use

electronic Research Administration (eRA) Overview

Electronic Research Administration (eRA) is defined as the process through which the administrative and business side of grant activity is automated via electronic communication. UC Davis and many extramural funding agencies/sponsors now utilize various eRA systems to manage the grant administration process.

eRA systems automate many grant administration functions, such as:

1. Preparing and submitting application materials,
2. Reviewing application materials,
3. Submitting post-award materials, such as progress reports and
4. Requesting administrative changes.

General Guidelines of eRA Systems

eRA systems may be commercial products used by multiple organizations or organization-specific. Therefore, it is important to read user guides and other materials for each system to ensure correct use. While each eRA system will have unique rules, some general guidelines apply to most eRA systems.

1. Follow agency and program specific guidelines.
2. Register in the eRA system several days before submission.
3. Proposals must be accessible to and endorsed by Sponsored Programs.
4. Points of Contact are:
 - Program Contact: Principal Investigator
 - Admin Contact: SPO Award Analyst or awards@ucdavis.edu
 - Financial Contact: James Ringo, Contracts and Grants Accounting, efa-invoicies@ucdavis.edu
5. Ensure a contact person for the proposal (PI or department admin) is available during SPO review.

Remember these are general guidelines only. Always read agency, program and eRA system-specific guidelines.

Common eRA Roles

Each sponsor and eRA system defines roles project personnel and users. Read the sponsor, program and eRA system-specific guidelines to ensure individuals are correctly identified both on the application materials as eRA system users. The role given an individual will determine the functions that individual can perform in the eRA system.

1. **(Lead) Principal Investigator:** Lead PI or Contact PI on grants with co-PIs; Lead investigator of the overall project
2. **co-Principal Investigator:** Same responsibility as the Lead PI
3. **co-Investigator:** Investigator that is a primary contributor to the project; Does not have programmatic decision-making
4. **Other Authorized Users (OAU):** Non-PI or co-PI; May assist with budget preparation and proposal file updates
5. **Reviewer:** Reviews proposals on behalf of the funding agency
6. **Sponsored Projects Office (SPO):** Sponsored Programs office

7. **Authorized Official Representative (AOR):** Sponsored Programs office only; Approves proposals on behalf of The Regents
8. **Signing Official:** Sponsored Programs office only; Approves proposals on behalf of The Regents
9. **Financial Administrator:** Grants access to financial services; Cash requests, cash request history, grantee EFT update and grantee EFT update history

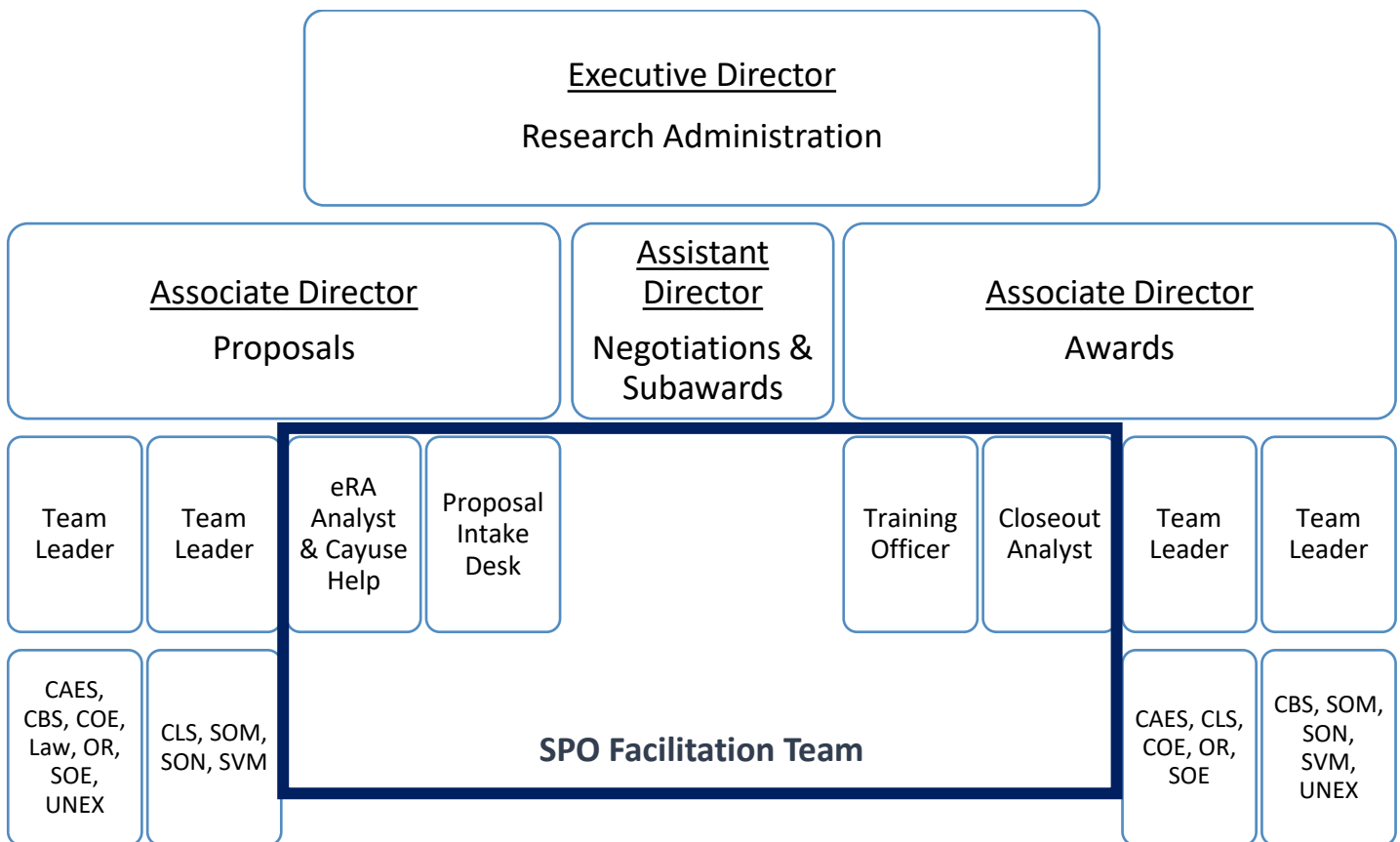
UC Davis eRA Systems

Sponsored Programs Overview

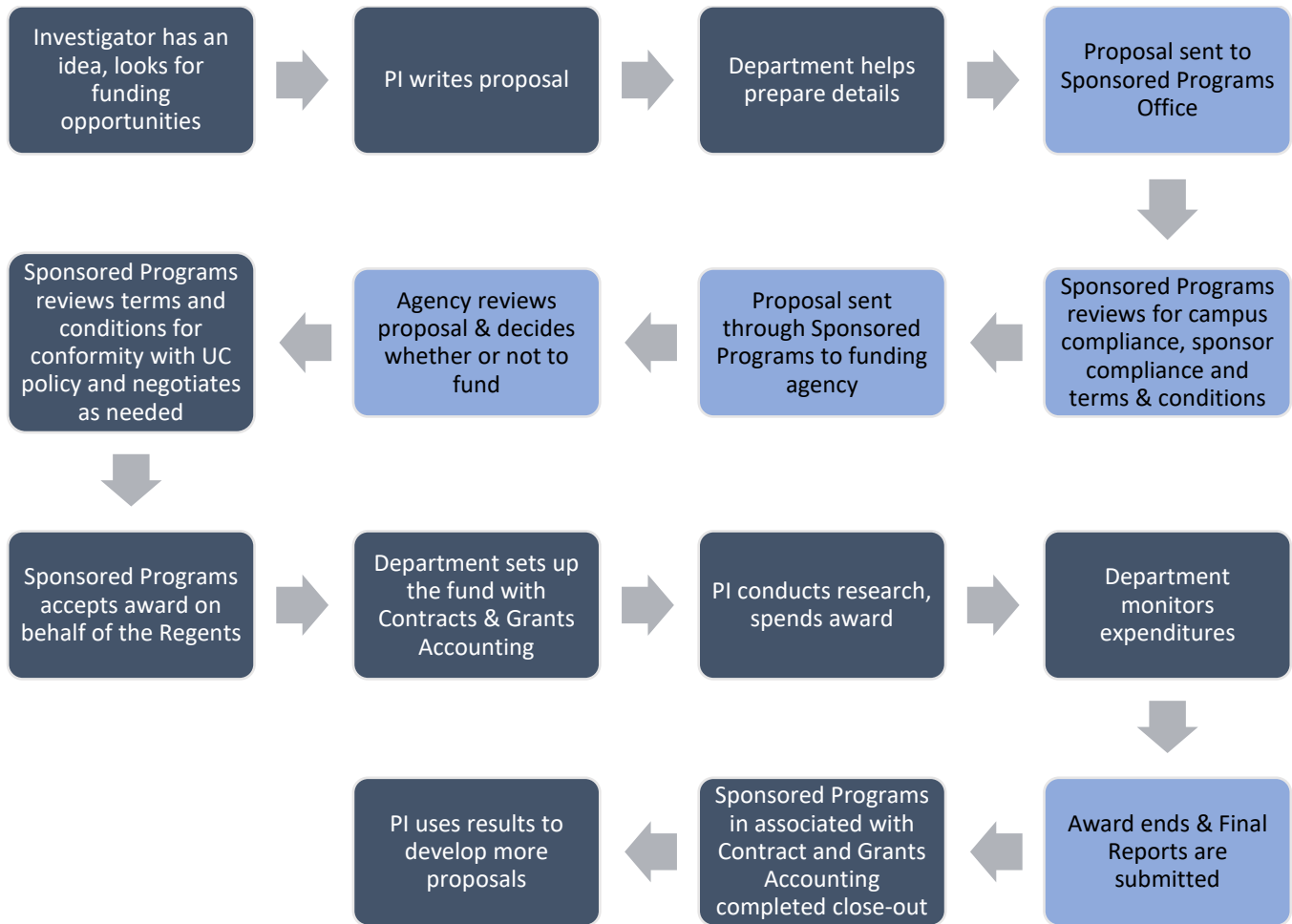
Per UC policy, Sponsored Programs is responsible for reviewing and submitting research proposals, and negotiating and accepting awards on behalf of the Regents. Our office is also responsible for drafting, negotiating, and executing subawards for collaborative research.

Relevant policies:

- PPM 230-01: <https://ucdavispolicy.ellucid.com/documents/view/129>
- <https://ucdavispolicy.ellucid.com/documents/view/131>
- http://researchmemos.ucop.edu/index.php/site/memoDetail/memo_id/RAO-95-01



Funding Process at UC Davis



UCD eRA Systems

Internal systems used to conduct research administration processes and transactions.

- [Cayuse](#) - Contract and grant processing
- [IRBNet](#) - Human subjects research
- [IACUC Protocols](#) - Animal care and use
- [eCOI](#) - Conflict of interest
- [BUA Application](#) - Biological use authorizations

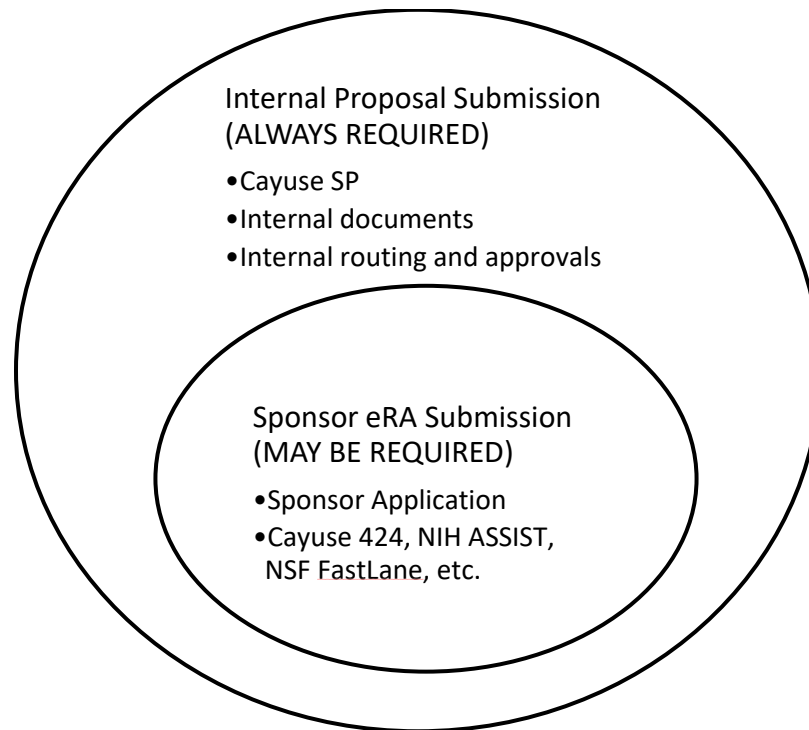
Informational Systems:

- [Pivot](#) - Funding opportunity database
- [InfoReady Review](#) - Internal funding opportunities (& limited submissions)
- [Core Facility Services and Equipment Search](#) - UCD shared resources

Cayuse Research Suite

UC Davis utilizes two Cayuse Research products: Cayuse SP and Cayuse 424. All UC Davis employees with a Kerberos ID have access to both products and sign in using their Kerberos user name and password. Both are accessed at <https://ucdavis.cayuse424.com>.

Extramural Proposal Submission



Cayuse SP

The Sponsored Programs office (SPO) utilizes Cayuse SP (<https://ucdavis.cayuse424.com>) to manage the research administration process at UC Davis. **All application materials requiring SPO review must be submitted through Cayuse SP.**

Cayuse SP Functions and Benefits

Cayuse SP serves as the eRA system at UC Davis for:

1. Routing and Approval
 - Principal Investigator and co-Principal Investigator Certification
 - Department/Unit Head Authorization
 - Dean Authorization, if School of Medicine is involved
 - Sponsored Programs Review and Approval
2. Award and Subaward Document Access
3. Pre-Award Spending (Advance Account) Requests

Benefits of Cayuse SP include:

- Online routing for approval of Proposals and Advance Account requests

- Data repository accessible to users outside of SPO
- Ability for users outside of SPO to run accurate reports on Awards.

Cayuse SP Roles

Cayuse SP includes Research Contact roles and Investigator/Research Team roles.

Research Contacts are users with the following administrative access in Cayuse SP.

Research Contact Role	Definition/Functions
Role Manager	Grants access to unit information and establishes roles
IPF Approver	Authorizes IPFs, usually the unit head
Pre-Award Spending Approver	Endorses advance account requests
Proposal Data Access	View access to proposals in that admin unit
Award Data Access	View access to awards in that admin unit

Investigator/Research Team roles are determined by an individual’s relation to the project and effects the routing and approval process and access to the Cayuse SP item/record. Only Key Personnel and those needing edit access to the proposal or view access to any associated awards should be added to the Investigators/Research Team tab.

Commonly used roles include:

Investigator/Research Team Role	Definition/Functions
Lead Principal Investigator	Required; must be added first; must certify and be authorized by IPF Approver
Principal Investigator	co-PI if allowed by the sponsor; must certify and be authorized by IPF Approver
Investigator	Primary contributor; must be authorized by IPF Approver
Proposal Editor	Will have edit access to proposal and view access to associated awards
Other Participant – No Routing	Will have edit access to proposal

Cayuse SP Guidelines

Internal Processing Forms (IPFs) are the internal form used for online outing and approval, as well as reporting. IPFs are also referred to as “Proposals” in Cayuse SP. However, they are a component of the proposal package and are also used for non-proposal actions, such as significant award amendments. Review the [Handbook for Department Contract & Grant Staff, Principal Investigators and Approvers](http://spark.ucdavis.edu/wp-content/uploads/End-users-v13.pdf) (<http://spark.ucdavis.edu/wp-content/uploads/End-users-v13.pdf>) to determine if an IPF is needed for a specific action.

Before submitting an IPF, it is important to ensure all units required to authorize the IPF have at least one IPF Approver established. Failing due to do so could cause the IPF to not route appropriately for approval, and thus not arrive at SPO with sufficient time for review.

Read the IPF pages as they include UC Davis specific guidelines. For example, the top of the General page includes instructions on entering the Short Project Name.

If the IPF is being submitted for proposal review, submit the IPF and obtain **all** certifications and approvals so that the IPF arrives in SPO for assignment **at least** five business days before the sponsor deadline. If IPFs are not received within this time frame, SPO cannot guarantee a full review of the application materials before submission to the sponsor. This could have negative consequences if the proposal is awarded, such as:

- The award may include terms and conditions that are unacceptable to the Principal Investigator and/or The UC

Regents. For example, the sponsor may restrict publication of research results.

- An incorrect F&A rate may have been used to calculate the proposal budget resulting in the application of a higher rate, which may not be acceptable the sponsor or provided enough funding for performance of the project.

The minimum documents required for SPO assignment are:

1. Completely routed and authorized IPF
 - a. PI Certification
 - b. IPF Authorizations
2. Budget (spreadsheet)
3. Budget justification, if required by the sponsor
4. Scope of Work (may submit a draft and provide the final before submission to sponsor)

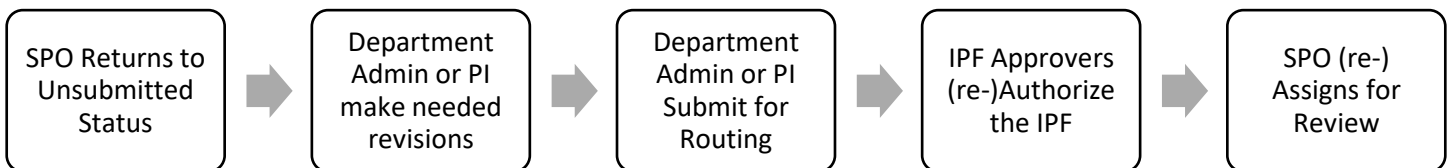
Returning an IPF for Correction

SPO may need to return a Proposal for correction and re-routing. Some common reasons include:

- Incomplete IPF submitted
 - Not all required fields were complete
 - Lead PI and or co-PI did not certify
- Cost sharing was entered/applied incorrectly on the budget
- Personnel effort was changed from direct charge to cost share
- Key personnel were added project after routing to SPO
- Subawards were added to the project/budget after routing to SPO

In these cases, SPO will return the Proposal to Unsubmitted status and the Principal Investigator or department contract and grant administration will make the needed changes and submit the proposal for routing and approval again.

If an IPF Approver rejects a Proposal, the Proposal will be found on the Unsubmitted Proposals list but show the status of "Rejected".



Finding the Assigned SPO Analyst and Checking the Status

To determine the status of an action, find the relevant item in Cayuse SP.

The assigned Sponsored Programs proposal and award analysts are found on the top of the Proposal Administration screen in the Specialists field.

>> Proposal Routing Status

Proposal: 19-0999	Sponsor: DoE Office of Science/Office of Basic Energy Sciences	Submission Deadline: 11/01/2018
Project:	Prime Sponsor:	Proposed Begin-End Dates: 1/01/2019 - 12/31/2019
Lead PI: Charlie Apple	Instrument Type: Grant	Proposed Total Amount: \$ 0.00
Admin Unit: OVCR - Sponsored Programs	Specialists: Kassie Obelleiro , Kassie Obelleiro	
Project Title: 10/18 Test Proposal for Fredrick Singh		

The status of a **Proposal** is found on the Status History tab of the Proposal Administration screen.

Approvals	Compliance	Status History	Advance Account	Awards		
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Status History		
Status	Person	Date
Changed to: Funded	Changed by: Kassie Obelleiro	1/11/2019, 1:08 PM PST
Changed to: Unsubmitted	Changed by: Amie Admin	10/16/2018, 12:08 PM PDT
Changed to: Copied	Changed by: Amie Admin	10/16/2018, 12:08 PM PDT

Proposal Status	Definition
Unsubmitted	Not submitted for routing
Dept Approval in Process	Submitted for routing and pending IPF (departments and or deans, if applicable) approvals
Admin Office in Process	Received by SPO but not assigned
PS Review	Under review by Proposals Analyst
CS Review	Under review by Awards Analyst
Proposal Approved	Proposal approved for submission to sponsor
Reopened	Proposal was rejected by an IPF approver and may need revision
Submitted to Sponsor	Proposal has been submitted to the sponsor
Withdrawn	Proposal withdrawn by the Principal Investigator
Not Funded	Proposal not funded by the sponsor
JIT Request Received	SPO or Principal Investigator received a JIT request from the sponsor
JIT Request Approved	SPO has approved the JIT information provided by the Principal Investigator /department
JIT Request Unsubmitted	The Principal Investigator decided not to submit JIT information
Funded	Notice of Award received by the sponsor (This does not mean the award has been executed)

The status of an **Award** is found on the My Awards or Awards in My Unit listing of the Proposal Dashboard.

>> My Awards

Awards Active Projects Inactive Projects

Below is a list of obligated awards on which you are listed as a member of the Research Team.

Award No.	Project Title	Lead PI	Sponsor	Award Amount	Award Notice Received	Award Begin Date	Award End Date	Admin Unit	Account Numbers	Status
A19-2751-001	Best Research Project	Charlie Apple	NIH National Center for Advancing Translational Sciences	\$300,000.00		10/26/2018	10/01/2018 09/30/2020	Ag & Resource Economics (030010)		Closed (Work Complete)
A19-2749-009	testing	Charlie Apple	National Science Foundation (NSF)	\$0.00		01/17/2019	02/01/2019 02/26/2021	Plant Biology (011020)		Pending
A19-2749-007	testing	K C Lloyd	National Science Foundation (NSF)	\$-39,250.00		10/26/2018	01/01/2019 12/31/2019	OVCR - Sponsored Programs (061821)		Unsuccessful Negotiation
A19-2749-001	testing	Charlie Apple	National Science Foundation (NSF)	\$285,000.00		09/14/2018	01/01/2019 12/31/2019	OVCR - Sponsored Programs (061821)		Active

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[Export to CSV](#)

Award Status	Definition
Pending	The award is not fully executed
Active	The award has been fully executed and routed to Contracts and Grants Accounting

The status of a **Subaward** is found on the Subcontract tab of the Project.

Project Administration

Project: [A19-2749 \(Prime Acct: \)](#) Sponsor: National Science Foundation (NSF) Project Begin-End Dates: 1/01/2019 - 6/30/2021

Lead PI: [Charlie Apple](#) Prime Sponsor: Anticipated Amount: \$1,555,760.00

Admin Unit: OVCR - Sponsored Programs Instrument Type: Contract Obligated Amount: \$791,750.00

Project Title: testing

General Awards Budget Overview Accounts Personnel Proposals Subcontracts

Subcontracts for this project

Subcontract No.	Account No.	Admin Unit	Status	FFATA Report Required	Organization	Sent Date	Execution Date	Total Dist.
A19-2749-S002		OVCR - Sponsored Programs	(Awaiting) Award Mgr/Analyst		Rice University			\$25,000.00
A19-2749-S001-A01		OVCR - Sponsored Programs	(Awaiting) Award Mgr/Analyst		State of Louisiana			\$30,000.00

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Subaward Status	Definition
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(Awaiting) Admin Dept	Action is required by the Principal Investigator /department
(Awaiting) Award Mgr/Analyst	Action is required by the Award Analyst
(Awaiting) Subcontractor	Action is required by the Subcontractor/Subawardee
Fully Executed	The Subaward/Subcontract is fully executed and has been sent to CGA

View more details of the status and find the assigned Sponsored Programs subaward analyst by opening the Subaward and going to the Notes tab.

>> Subcontract Administration

Subcontract No: [A19-2749-S002](#) ([View Project](#))

Subcontract Type: Original

Status: (Awaiting) Award Mgr/Analyst

Project Title: testing

FDP Templates:

Amount: \$25,000.00

Last Updated: 10/29/2018 11:21 AM PDT - Kassie Obelleiro

Primary Admin Contact: [Amie Admin](#)

General

Note	Recorded By	Date	Note Area	Category	Access
Assigned to Kassie Obelleiro	Kassie Obelleiro	12/17/2018	Subcontract	General	Admin Office All Parties

Cayuse 424 (<https://ucdavis.cayuse424.com>) is an eRA submission to submission system to which UC Davis subscribes. Cayuse 424 streamlines the proposal submission process by importing the required applications for funding opportunities, auto-loading Professional Profile information when individuals are added to an application, auto-populating institutional data, checking application materials for errors and electronic submission of application materials to most federal agencies and some other sponsors.

Cayuse 424 Functions and Benefits

Cayuse 424 is the eRA system used for:

1. Professional Profile management in the Cayuse Research Suite
2. Application submissions to federal sponsors **except:**
 - a. NASA – Use NSPIRES
 - b. NSF – Use Research.gov/FastLane
 - c. NIH – Use ASSIST for Cayuse 424
 - d. Opportunities not offered in Cayuse 424 – Use the sponsor-mandated system

The benefits of Cayuse 424 include:

1. Auto-population of institutional data
2. Auto-loading of professional profile information
3. Ability to grant view and edit access to others
4. Error checking and validation
5. May download a PDF of entire application, including attachments

Cayuse 424 Guidelines

1. Professional Profiles
 - a. Imports to Cayuse SP and effects routing and approval
 - b. All user should create a Cayuse 424 Professional Profile, not just faculty
 - c. Keep Professional Profiles current
 - i. eRA roles: PI must be checked for PI functions
 - ii. Department/division: Unit most often used for contracts and grants
 - iii. Employee ID: Imports appointment, salary and benefits information
 - iv. Performance Site
2. Application/Proposal Submission
 - a. Start from the opportunity
 - b. Give others permission
 - c. Add your usual SPO Proposal Analyst to the Routing Chain
 - d. Read all sponsor and program guidelines
 - e. Complete and check all required tabs
 - f. Check and correct errors/warnings
 - g. Have the full application ready and approve by PI two (2) days before the deadline
 - h. SPO usually submits to sponsor

Cayuse 424 eRA Roles

Cayuse 424 includes the following NIH-accepted roles. Because roles determine which functions user can perform, it is important to establish the correct roles.

eRA Role	Definition/Functions
----------	----------------------

Principal Investigator	Program Director/Principal Investigator; Must be selected in order to be added as a PI
Assistant (ASST)	Proposal/ application editor
Administrative Official (AO)	SPO role only; May review proposals
Signing Official/AOR (SO)	SPO role only; May approve proposals for submission to the sponsor

Sponsor eRA Systems

NSF Research.gov/FastLane

The National Science Foundation (NSF) utilizes Research.gov/FastLane (<https://www.research.gov>) for grant administration.

Research.gov/FastLane Functions

1. Prepare and submit proposals to NSF.
2. Review NSF proposals and serve on a review panel.
3. Submit award reports.
4. Manage financials of an NSF award.

Research.gov/FastLane Access

1. Users must have an NSF ID and be affiliated with UC Davis
2. Each user can have only one NSF ID
 - NSF account lookup: <https://www.fastlane.nsf.gov/researchadmin/nsfidLookupRead.do>
3. Register for account at <https://www.research.gov/accountmgmt/#/registration>
4. Send email to spoerahelp@ucdavis.edu with ID. SPO will grant access.

Research.gov/FastLane Guidelines

1. Register early for your NSF ID
2. Read all sponsor, program and specific guidelines
3. Check for updates!
4. Have the full application ready and approved by PI two (2) days before the deadline
5. SPO submits to NSF.

Research.gov/FastLane Roles

Common Research.gov Role	Definition/Functions
Principal Investigator (PI)/co-PI	Responsible for scientific or technical direction; Can perform proposal and award actions
Other Authorized User (OAU)	May assist with budget preparation and revision and proposal file updates; Must have the Proposal PIN and ID number
Authorized Organizational Representative (AOR)	SPO role only; Submits proposals

NIH eRA Commons

eRA Commons is the eRA system used by the National Institutes of Health (NIH) for grant administration.

eRA Commons Functions

1. Submit proposals to NIH via ASSIST.
2. Submit Just-in-Time (JIT) items.
3. Perform award actions, such as submitted Progress Reports, for NIH awards.

eRA Commons Access

1. Anyone with effort must have an eRA Commons account at time of award
 - a. Contact SPOeRAHelp@ucdavis.edu to register
 - b. Must be affiliated with UC Davis

eRA Commons Guidelines

1. Register early for your eRA Commons ID
2. Read all sponsor, program and specific guidelines
 - a. Check for updates!
3. Have the full application ready and approved by PI two (2) days before the deadline
4. SPO submits proposals and post-award actions, including Research Performance Progress Reports
 - a. Except for SNAP awards: PI may submit

eRA Commons Roles

Common eRA Role	Definition/Functions
Project Director (PD)/ Principal Investigator (PI)	May edit the application; Must have an eRA Commons account when application is started in NIH ASSIST
Assistant (ASST)	Proposal/ application editor
Administrative Official (AO)	SPO role only; May review proposals
Signing Official (SO)	SPO role only; May approve proposals for submission to the sponsor

NIH xTrain

xTrain is the eRA Commons module for managing trainee appointments on training grants, including terminating trainee and fellow appointments. One of the following roles is required to use the xTrain module:

- TRAINEE – Enters data and manages
- PI – Enters data and manages
- SO – View access
- BO – Submits Terminations
- SPONSOR – Terminates Fellows
- ASST (when delegated by SPONSOR or PI)

Other eRA Systems

There are various other eRA systems used by sponsoring agencies, and it is difficult list them all. Following are some of the other eRA systems SPO and researchers at UC Davis encounter.

eRA System	Notes
SmartSimple UCOP proposals: https://ucop.smartsimple.com/s_Login.jsp	Register for an account: https://ucop.smartsimple.com/s_Login.jsp <ul style="list-style-type: none"> • Select Register Here SPO submits to the sponsor
Grants.gov https://www.grants.gov/	Access: https://www.grants.gov/ <ul style="list-style-type: none"> • Search for funding opportunities • Subscribe to update emails • Apply to programs if mandated by the sponsor • In general, applications to federal agencies must be submitted through Cayuse 424 • Register: https://www.grants.gov/web/grants/applicants/registration.html
G5 https://www.g5.gov	<ul style="list-style-type: none"> • Access: https://www.g5.gov • Register for an account: https://www.g5.gov/g5/home/externaluserregistration • Two factor authentication: <ul style="list-style-type: none"> ○ G5 password ○ Unique code • Conduct application review, perform administrative actions on grants and submit progress reports
NASA Solicitation and Proposal Integrated Review and Evaluation System (NSPIRES) https://nspires.nasaprs.com/external/	<ul style="list-style-type: none"> • Access: https://nspires.nasaprs.com/external/ • Individual Registration Required: https://nspires.nasaprs.com/external/aboutRegistration.do • View solicitations, submit proposals and conduct proposal review • SPO submits to sponsor
Financial Assistance and Applications Submittal Tool (FAAST) http://faast.waterboards.ca.gov/	<ul style="list-style-type: none"> • Access: http://faast.waterboards.ca.gov/ • Various State agency funding • Principal Investigator self-registration • Principal Investigator submits to sponsor • SPO does not have access – Upload all documents in Cayuse SP
ezFedGrants and Agreement System https://nfc.usda.gov/FSS/clientservices/ezFedGrants/index.php	<ul style="list-style-type: none"> • ezFedGrants (eFG) Grants and Agreements System: https://nfc.usda.gov/FSS/clientservices/ezFedGrants/index.php <ul style="list-style-type: none"> ○ Register early – Give yourself at least one week!! • SPO submits to sponsor

Resources

Common Acronyms

- AB20: Assembly Bill 20
- BAA: Broad Agency Announcement
- BUA: Biological Use Approval
- CGA: Contracts and Grants Accounting
- COI: Conflict of Interest
- ERA: Electronic Research Administration
- F&A: Facilities & Administrative rates; also referred to as indirect cost rate (IDC or ICR) or “overhead”
- FOA: Funding Opportunity Announcement
- GMS: Grant Management System
- HASTOC: Human Anatomic Specimens and Tissue Oversight Committee
- IACUC: Institutional Animal Care and Use Committee
- IPF: Internal Processing Form
- IP: Intellectual Property
- IRB: Institutional Review Board
- PI: Principal Investigator
- RCI: Research Compliance and Integrity
- RCR: Responsible Conduct of Research
- RFA: Request for Applications
- RFP: Request for Proposals
- PHS: Public Health Service
- PRAM: Progress Report Additional Materials (NIH)
- RPPR: Research Performance Progress Reports
- SBIR: Small Business Innovation Research
- SNAP: Streamlined Non-Competing Award Process (NIH)
- SPO: Sponsored Programs unit in the Office of Research
- STTR: Small Business Technology Transfer

Sponsored Programs Contacts

- SPO Contact Us webpage: <http://research.ucdavis.edu/contact-us/sponsored-programs/>
- Proposals: proposals@ucdavis.edu
- Awards: awards@ucdavis.edu
- Subawards: subawards@ucdavis.edu
- Closeouts: closeouts@ucdavis.edu
- eRA Help: SPOeRAhelp@ucdavis.edu
- Cayuse Help Desk: ORCayuseHelp@ucdavis.edu
 - For ALL Cayuse SP/424 Issues
- Training: SPOTraining@ucdavis.edu

Office of Research Listservs

- C&G Listserv: <https://lists.ucdavis.edu/sympa/info/ovcr-cg>
- Other Office of Research Listservs: <http://research.ucdavis.edu/resources/listserv-subscriptions/>

Online Systems

- BUA Application: <http://safetyservices.ucdavis.edu/article/biological-use-authorization-bua>
- Cayuse 424 and SP: <https://ucdavis.cayuse424.com/>
- eCOI System: <https://or-forms.ucdavis.edu/>
- eRA Commons: <https://era.nih.gov/>
 - xTrain Help: <http://era.nih.gov/erahelp/xTrain>
- IACUC Application: <https://iacuc.ucdavis.edu/protocol/>
- IRBNet: <https://www.irbnet.org/release/index.html>
- Research.gov: <http://www.research.gov/>

Websites and Online Documents

- Office of Research: <http://research.ucdavis.edu/>
- Principles Regarding Rights to Future Research Results: <https://www.ucop.edu/research-policy-analysis-coordination/policies-guidance/future-research-results/index.html>
- Sponsored Programs: <http://research.ucdavis.edu/proposals-grants-contracts/spo/>
- Sponsors/Agencies that have adopted PHS regulations for COI: <https://research.ucdavis.edu/policiescompliance/coi/phs/>
- Sponsored Programs Research Administration Kiosk (SPARK) Website: <http://spark.ucdavis.edu/training/>
- Subaward Checklist: https://research.ucdavis.edu/wp-content/uploads/Subaward_PI-Department_Checklist.pdf



UCDAVIS
SPONSORED PROGRAMS OFFICE

Research Administration Forum

FOURTH WEDNESDAY OF EACH MONTH
8:30 – 10:00 AM
OFFICE OF RESEARCH CONFERENCE ROOM 200
1850 RESEARCH PARK DRIVE, DAVIS
ZOOM: [HTTPS://UCDAVIS.ZOOM.US/j/99842677540](https://UCDAVIS.ZOOM.US/j/99842677540).

2021

Forum for department research administrators to:

- Ask questions of campus research administration units
- Provide feedback regarding research administration services and processes
- Hear updates from campus research administration units, such as Contracts and Grants Accounting, Sponsored Programs, Research Compliance and Integrity, IRB Administration, IACUC and others

Reminders and updates are sent to the C&G Listserv:

<https://lists.ucdavis.edu/sympa/info/ovcr-cg>

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SPO Lab (Formerly SPO BAASICS)

ON HIATUS AS OF SPRING 2021

Formerly these in-person trainings/labs took place on Thursdays at the Office of Research (1850 Research Park Drive, Davis, 95618) in Conference Room 129. Research administrators could come for practice or to work through issues they were experiencing in Cayuse SP/424 or with other sponsored program processes. Notices will go out when these labs resume.

- Cayuse 424 – Professional Profile & Entering an Application
- Cayuse SP – Entering Proposals
- Cayuse SP & 424 – Submitting a Proposal with (outgoing) Subawards
- Cayuse SP & 424: Submitting a Proposal as a Subawardee
- Cayuse SP Role Manager Training
- Submitting Multi-Component Proposals to NIH (in ASSIST)
- Preparing a Cost Proposal Budget
- Proposal Budgeting Basics
- Proposal Budget Development: Using the OR Budget Templates
- Writing a Budget Justification
- And more...

SDPS Classes Offered by Sponsored Programs

- Sponsored Programs Essentials (RACS)
- Proposal Preparation and Submission (RACS)
- Preparing a Proposal Budget: Basics (RACS)
- Preparing a Proposal Budget: Lab (RACS)
- Understanding the Awards Process (RACS)
- electronic Research Administration (RACS/eRA)
- Cayuse SP and 424: Role Management, 424 Professional Profiles and Routing (eRA)
- Cayuse SP: Working with SPO on Awards and Pre-Award Spending Requests (eRA)
- Cayuse SP and 424: Working with SPO on Subawards (eRA)