

**S2S Grants (Cayuse)**  
**Business Processes & Procedures**  
**Handbook**

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## Requesting System Access

- New user system access can only be established by an S2S Grants System Administrator in ORA.
- To request system access, a new user should first contact the research administration business office for their home department/unit (“the department”).
- The new user will need to provide the department with their nine-digit University ID (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 completed or verified, the department should email the System Administrator(s) at [erahelp@research.ucla.edu](mailto: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:**

- Accessing S2S Grants requires both: (1) an active S2S Grants user account, and (2) a UCLA Logon ID.
- S2S Grants utilizes UCLA’s Single Sign-On multi-factor authentication, which means that users must log in with their existing UCLA Logon ID and password.
- For assistance with creating or retrieving a UCLA Logon ID, or resetting the password, resources are available at: <https://accounts.iam.ucla.edu/#/>

## Getting Started

- S2S Grants is a web-based application that operates as UCLA’s system-to-system solution for Grants.gov submissions.
  - For examples of when **not** to use S2S Grants, please see OCGA’s S2S Grants project webpage: <https://ocga.research.ucla.edu/s2s-grants/>
- The URL for S2S Grants is [s2sgrants.research.ucla.edu](https://s2sgrants.research.ucla.edu).
- S2S Grants can be accessed with various web browsers on either Windows or Mac systems.

### Windows

- Full support for recent versions of Firefox and Chrome.
- Provisional support for Microsoft Edge.

### Mac

- Full support for recent versions of Chrome and Safari.

- Required browser configurations are:

JavaScript	<b>Enabled</b>
Cookies	<b>Enabled</b>
Pop-ups	<b>Allowed</b>

- 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.

## Professional Profiles


### Creating Professional Profiles

- All S2S Grants users have the ability to create Professional Profiles.
- Before creating a new profile, search for and verify that one does not already exist.
- Professional Profiles should be created for UCLA Key Personnel and S2S Grants system users; users are also welcome to create profiles for recurring non-UCLA collaborators.
  - An alternative mechanism for entering non-UCLA personnel (e.g. subaward personnel, consultants, etc.) directly into an application is available: select a “**Non-UCLA, PI#\_**” skeleton profile (found under “N” on the PI List) to autofill the proposal, then overwrite/complete with actual information.
- Professional Profiles for new users should be created and completed *prior* to requesting S2S Grants system access.
- When a Professional Profile is created, full permissions are automatically granted to the creator.
- Grant explicit permissions to a 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 be provided with the **Write** permission to all Professional Profiles for their department/unit to ensure that edit 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 displays required fields for *Investigator* and *Other User* profiles):
  - Name
    - Full Name with Prefix and Suffix
    - NIH Commons ID field, if applicable.
      - Double-check and ensure this is entered correctly. Contact [OCGA eRA Help](#) for assistance with this. An incorrect Commons ID may result in a fatal submission error.
    - NASA NSPIRES ID, if applicable.
  - Degrees
    - NIH Degrees (required for NIH)
      - Input degree type(s) the investigator currently holds that are relevant to a request for NIH funding.
    - Senior/Key Person Degree Type and Year (required for other federal sponsors)
    - NSF Degree Type and Year (not required)
      - NSF captures this information Research.gov, which should be used instead of S2S Grants for NSF proposal submission.

- Demographics (required)
  - Please be sure to answer all five questions. (Note: “Do Not Wish To Provide” is selectable for each, if preferred.)
- Institutional Association
  - Select green plus icon **+** to add a new association
  - Associate UCLA personnel with Institution: *The Regents of University of California, Los Angeles – UCLA*
- 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 code 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 for the address entered.
- eRA Role
  - For faculty, NRSA fellowship applicants, other researchers or key persons, select “Principal Investigator.” This is especially important. If the eRA Role is not indicated for the PI, their 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
  - Enter Appointment (Appt) Type in Months only
    - either Calendar **OR** Academic and Summer, but not all three.
  - Do not enter salary dollar amounts. We recommend inputting salary amounts directly into the proposal as these rates are likely to change over time, and maintaining this information in Professional Profiles can be administratively burdensome.
  - Optional!: import the Institutional Rates and select the appropriate composite benefit rate(s). These rates can also be input directly into proposal budget.
- 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 all information manually, or click “Fill from Contact Info” button and add street address.
  - If “Fill from Contact Info” button is used, the system defaults to OCGA’s zip code (90095-1406) which will need to be updated for the street address entered.
  - **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.
- UCLA’s Unique Entity Identifier (UEI) is: RN64EPNH8JC6
- The UCLA DUNS Number is: 092530369
- The proper format for Congressional Districts is:
  - Two-letter State Abbreviation-###
  - Example: CA-036 for California Congressional District 36

### Requesting Access to Other Profiles

- Should a user require access to a profile (beyond the default List, Read and Autofill), they 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. If none of the users are still at UCLA, please contact [OCGA eRA Help](#) for assistance.

### Hints & Tips:

- Professional Profiles should be created for UCLA Key Personnel and S2S Grants system users. Additionally, users are welcome to create profiles for recurring non-UCLA collaborators.
- Before creating a new profile, search for and 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 and the existing profile is not the same person, send e-mail to [OCGA eRA Help](#) for assistance.
- 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.
- All users who are added to a profile are automatically granted the following permissions: List, Read, and Autofill – the Write permission will need to be selected to enable the user to edit the profile.

 Refer to **Training Module 3** on the [S2S Grants project webpage](#) for more detail on this topic.

Screen/Field	Investigators	Other Users
<b>Name</b>		
Prefix	Required	Not Required
First	Required	Required
Middle	If used professionally	If used professionally
Last	Required	Required
Suffix (Jr., Sr., II, etc.)	If applicable	If applicable
NIH Commons ID	Required (NIH researchers)	Not Required
NASA NSPIRES ID	Please use NSPIRES for NASA proposals	Not Required
NSF ID	Please use Research.gov for NSF proposals	Not Required
<b>Degrees</b>		
NIH Degrees	Required (NIH researchers)	Not Required
Senior Key Person Degree Type	Required (All other researchers)	Not Required
Senior Key Person Degree Year	Required (All other researchers)	Not Required
NSF Degree Type	Please use Research.gov for NSF proposals	Not Required
NSF Degree Year	Please use Research.gov for NSF proposals	Not Required
<b>Demographics</b>	Complete all five questions	Not Required
<b>Biosketches</b>	Not Required	Not Required
<b>Contact Info</b>		
Street 1	Required	Required
Street 2	If applicable	If applicable
City	Required	Required
State/Province	Required	Required
Zip/Postal Code	Required	Required
County	Required	Required
Country	Required	Required
Phone	Required	Required
Fax	Optional	Optional
Email	Required	Required
<b>eRA Role</b>	Required – Principal Investigator	Required – Assistant
<b>Department / Division / Title</b>		
Department Code and Title	Required	Required
Division Code and Title	If applicable	If applicable
Position/title	Required	Required
<b>Salary and Fringe Worksheet</b>		
Employee ID	Not Required	Not Required
Appt Type – Calendar	Required as applicable	Not Required
Appt Type – Academic	Required as applicable	Not Required
Appt Type – Summer	Required as applicable	Not Required
Fringe Worksheet	Optional	Not Required
<b>Performance Site</b>	Complete all fields and check “Active”	Not Required

## 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 Applicant 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 created/updated by a System Administrator (generally within 1-2 business days) at [erahelp@research.ucla.edu](mailto:erahelp@research.ucla.edu).
- To request a new Institutional Profile, first ensure the entity has a Unique Entity ID (UEI) in SAM.gov. For entities that are **not** seeking the ability to be a prime recipient of federal funding (i.e. subawardees only), SAM.gov provides the option to get a UEI without full entity registration.
  - Send email with the following information to [erahelp@research.ucla.edu](mailto:erahelp@research.ucla.edu):
    - **Unique Entity ID (UEI)**
    - **EIN number** (if applicable)
    - **F&A rate agreement** (if applicable)
- A System Administrator will notify the requester once the profile has been created/updated.

### Hints & Tips:

- A UEI 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.
- An Institutional Profile is not required for *imported* subawards.


## Preparing a Proposal

### Creating a Proposal

- To initiate a new proposal, first check to see if the opportunity is already in the system by searching for it in the Opportunities tab. If it is not, a user can download the opportunity.
- When more than one opportunity shares the same Opportunity Number, users should be careful to select the correct one from the list by checking the information in the Comp. ID and Comp. Title columns.
- Verify that the PI has a Professional Profile in the system. If not, create one for them and indicate “Principal Investigator” for their eRA Role.
- A proposal can be initiated from either the Opportunities tab or Proposals tab. Upon creating the proposal, enter the Proposal Name in the following naming convention:

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

**Example: ERG, Bruin, PA-20-185, Cancer grant R01**

- The reviewer should be the user’s OCGA Signing Official or Departmental Research Associate (DRA).
- **The Proposal Deadline is a user defined field that can be updated at any time on the Proposal Summary page. This, along with the proposal naming convention, is especially important as it is displayed on the Proposals List.**
- At set-up, users should also grant the appropriate individuals (e.g., PI, PI assistant, fellow fund managers, etc.) access to the proposal using Permissions . The specific permissions granted to other users is up to the proposal preparer’s discretion.
- The Department and Division fields in Item #5 on the SF424 RR form (Cover Page) are NOT autofilled. **These fields should be left blank.**
- Internal documents (e.g., COI forms, PI Exception Letter, Subaward forms, etc.) can be stored to the Supporting Documents section of the proposal.

#### Hints & Tips:

- Remember to use the proposal naming convention and enter the deadline date, as this will assist reviewers in quickly identifying proposals that require 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 from 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, an [EPASS](#) will need to be submitted so that a Signing Official can be assigned to the submission.
  - Please see <https://ocga.research.ucla.edu/wp-content/uploads/how-to-submit-proposal.pdf>.
- The Signing Official will work with the PI and their team to address any issues ahead of submission. The PI’s final approval will be required before submission can take place.
- 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, they should contact [erahelp@research.ucla.edu](mailto:erahelp@research.ucla.edu) immediately.