
EPASS System – Updates

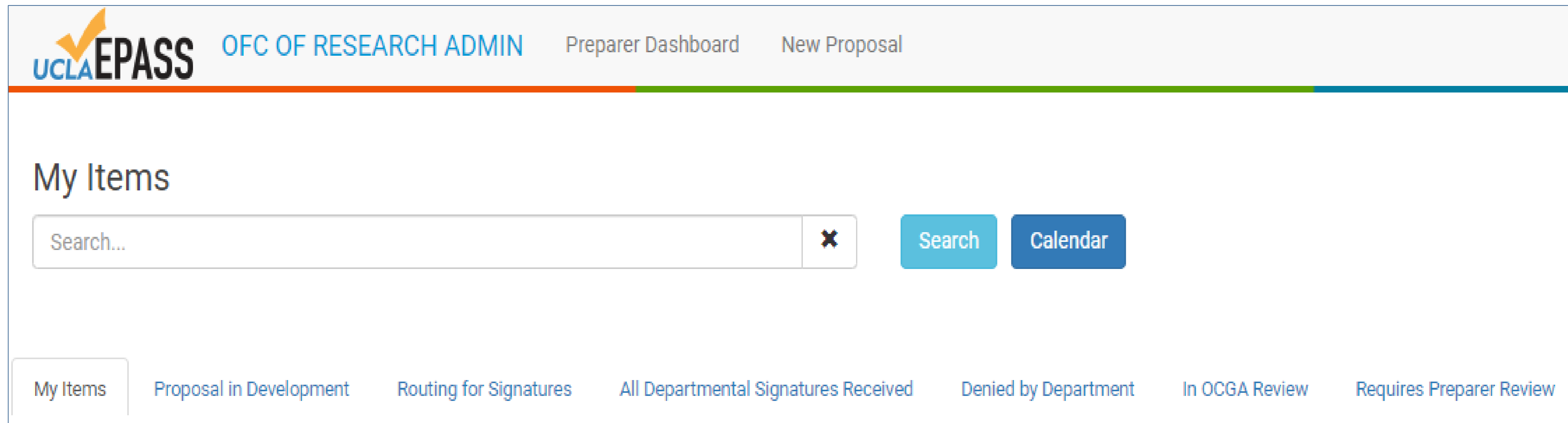
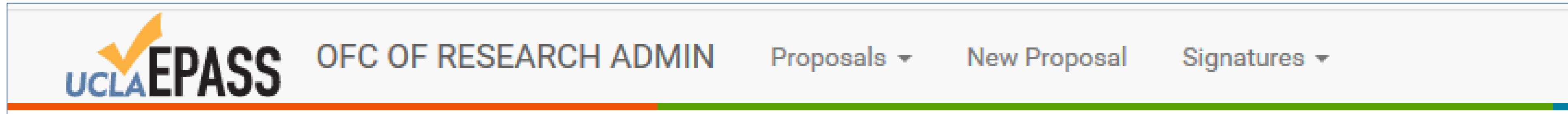
Research Administration Forum
February 2021

EPASS System – History

- EPASS System was created and used by the department of Neurology; eventually transferred to ORA for further enhancements and campus roll out
- Major enhancements since transfer:
 - Validations on required fields and responses
 - Electronic routing for signatures
 - Electronic proposal submission to OCGA Proposal Intake Team for review and assignment
 - Automated data transmission from EPASS System to PATS (vs. manual data entry)
 - Ability for Proposal Intake to return EPASS records for correction/edits prior to assignment
- Officially released into production in November 2019, after both internal (OCGA) and external (campus users) testing was completed
- We have estimated 6 waves for full campus department onboarding
 - Wave 1 roll out was completed on 11/18/2019
 - Waves 2-4 have been completed as of 12/22/2020

EPASS – Major Enhancements Since Nov 2019

- Upgraded dashboard view for preparers



EPASS Enhancement – Updated Document Upload Requirements

- Updated document upload requirements
 - Single PDF proposal upload vs individually uploaded documents (budget, budget justification and scope of work)
 - Note: the minimum document requirement has not changed

Attachments Minimum Proposal Requirements
No files have been uploaded.

Upload Other Documents

File Type: .csv,.xls,.xlsx,.doc,.docx,.ppt,.pptx,.pdf,.txt.
The individual file sizes cannot exceed 25 MB.

Click the button below to attach a new file.

Final Budget

File	Description
<input type="button" value="Choose File"/> No file chosen	

Final Budget Justification

File	Description
<input type="button" value="Choose File"/> No file chosen	

Statement of Work

File	Description
<input type="button" value="Choose File"/> No file chosen	

Other Documents



Upload Documents

File Type: .csv,.xls,.xlsx,.doc,.docx,.ppt,.pptx,.pdf,.txt.
The individual file sizes cannot exceed 25 MB.

Click the button below to attach a new file.

Proposal

(Note: The Proposal, at minimum, must include the Final Budget, Final Budget Justification, and a Statement of Work as a single, combined, PDF document)

File	Description
<input type="button" value="Browse..."/> No file selected.	

Other Documents

EPASS Enhancement – DRA Submissions

- Departmental Research Associate buttons
 - Allows for OCGA to track whether this is a DRA reviewed proposal; should be sent to OCGA within five (5) business days after submission
 - Email notification to acknowledge receipt of proposal with assigned PATS number

Investigators Department Proposal Types Sponsor Checklist Forms Funds Attachments Review Log

Will this proposal be submitted by a Departmental Research Associate (DRA)?

Yes No

Review Proposal

Title

PI	KUKREJA, HARVEEN Kaur
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Has the proposal been submitted to Sponsor? Yes No

[Send to OCGA](#) [Edit EPASS](#)

EPASS Enhancement – Award Received Without Proposal

- Awards Received Without Proposal Submission to OCGA. Features include:
 - Ability to attach award documents in the same screen
 - Section to note existing PATS number, if applicable

Is this EPASS being created for an award that has already been received?

Yes No

Is there an associated PATS number?

Yes No

PATS Number:

Upload Award Documents

File Type: .csv,.xls,.xlsx,.doc,.docx,.ppt,.pptx,.pdf,.txt.
The individual file sizes cannot exceed 25 MB.

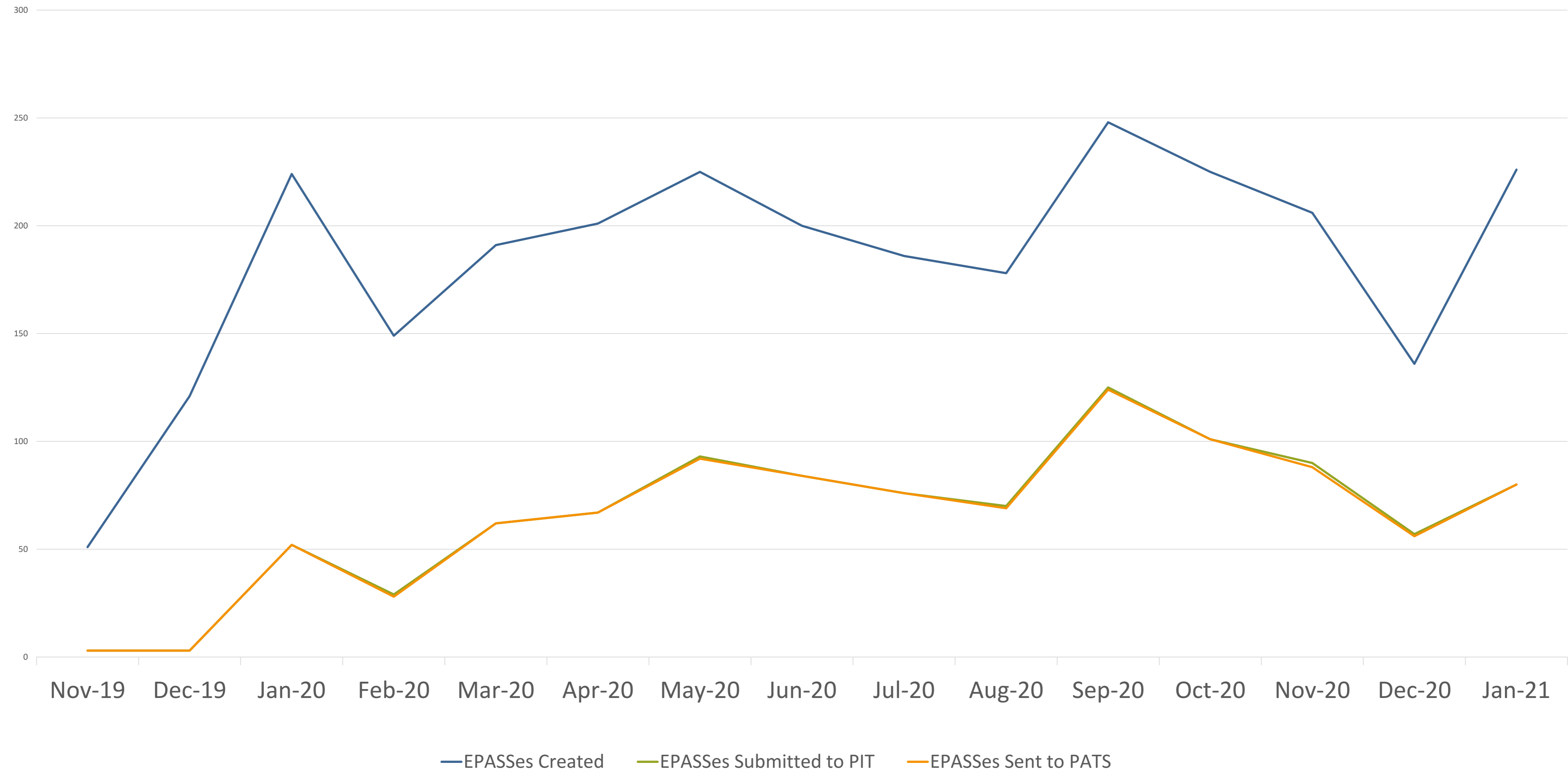
File	Description
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EPASS System – By The Numbers

- Current number of onboarded departments: 103
- Number of EPASS records created since production deployment: 2,767 (Including CTC&SR and TDG)
 - CTC&SR: 545 records created
 - TDG: 109 records created
- Number of proposal records sent to OCGA Proposal Intake via EPASS System: 992
- Number of proposal records created from EPASS system: 985

EPASS System Updates

EPASS Trends: November 2019 through January 2021



EPASS – Where Are We Going?

- Seek to continue with onboarding during remote working
 - Reaching out to Wave 5 participants this week. Targeted for completion by April 2, 2021
 - If you are interested in onboarding sooner, please contact EPASSHelp@research.ucla.edu
- Wave 6 is expected to begin April 5, 2021
- Once campus onboarding is complete, our goal is to put in place a requirement for ALL proposal submissions to OCGA be via the EPASS system
- We currently require all onboarded departments to submit exclusively via the EPASS system

EPASS – Future Enhancements

- Enhanced process to upload signatures for those individuals who have not yet started at UCLA (those with future appointments) (Target 3/2021)
- Ability to add more than two Co-PIs (Target 3/2021):
 - System currently limited to just two Co-PIs;
 - Increase to 20 Co-PIs
- Automated reminders for proposals not yet submitted to OCGA or still in preparer queue
- Ability for departments to archive proposals not going through with submission
- Integration with CITI Look-up and eDGE Gateway
- Pared down validations/fields to meet pre-proposal/LOI submission requirements to OCGA
- Enhanced validations to streamline EPASS creation process

EPASS System: Sending Proposals to OCGA Proposal Intake Team

- For departments that have been onboarded, Proposals must be submitted via the EPASS system

Dear EPASS Online System Users,

Expectations for EPASS Users after Onboarding:

1. In order to avoid confusion and potential creation of duplicate records, all proposals must be submitted to OCGA via the EPASS System. Onboarded departments should no longer send proposal materials via email to proposals@research.ucla.edu.

- Benefits to using the EPASS System:
 - Electronic routing for signature from PI to Chair/Dean
 - Validation of EPASS questions to ensure no missing responses
 - Ability to attach internal/compliance documents to the EPASS record and send to OCGA
 - Proposal Intake team can still retrieve the S2S documents
 - Faster PATS record creation and acknowledgement of receipt. Electronic record creation vs. manual data entry

Questions?

For questions, feedback, or suggestions regarding the EPASS System, please contact
EPASSHelp@research.ucla.edu

We're happy to assist!