
EPASS System Updates, Upcoming Trainings, and Onboarding Deadlines

Research Administrators Forum
March 9, 2023

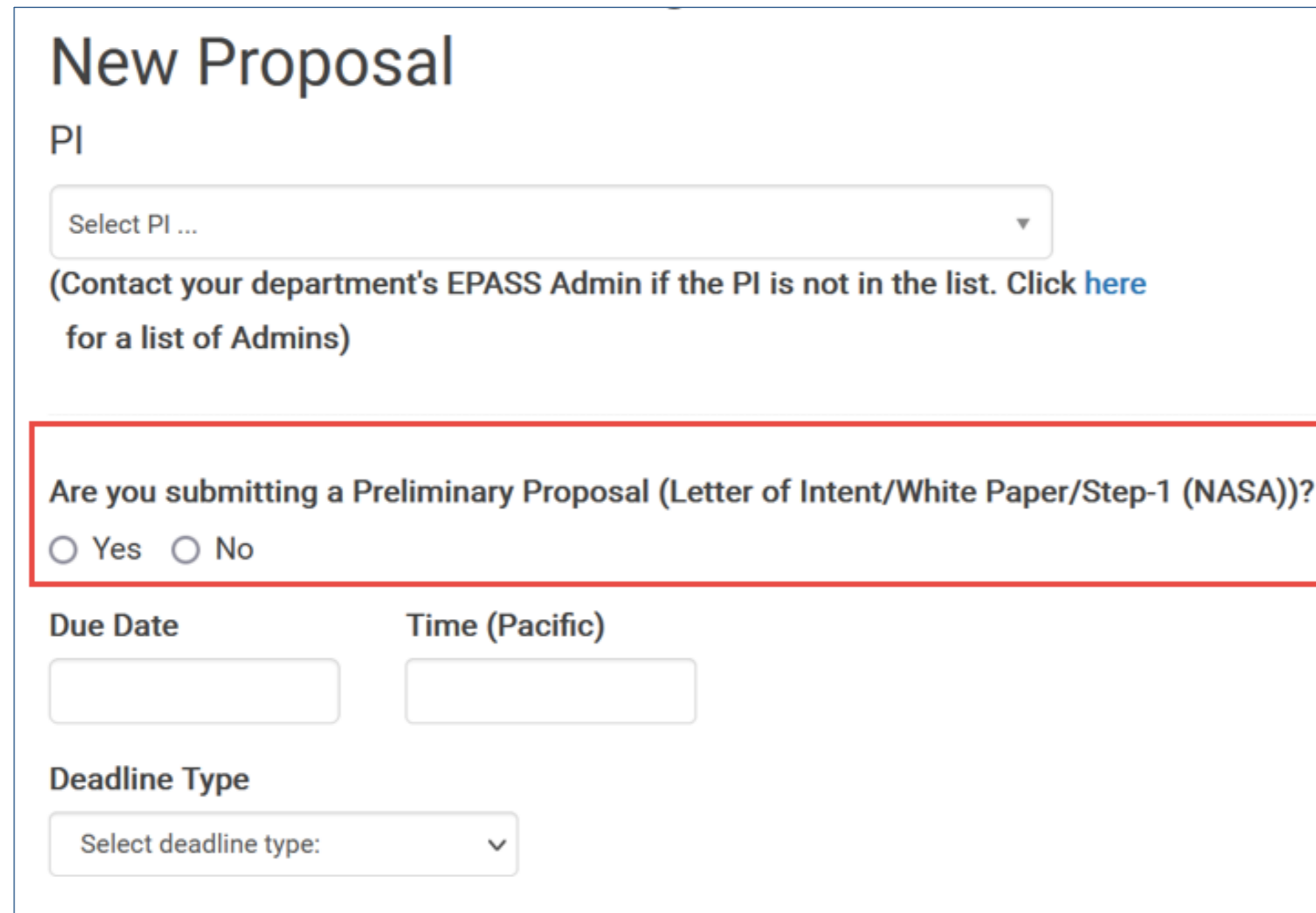
EPASS System – By The Numbers

- Current number of onboarded departments: 133
- Number of proposal records sent to OCGA via EPASS System:
 - Since Go-Live (Nov 2019) to present: 7,582
 - Current FY22-23: 2,540

80% of proposals submitted to OCGA are sent through the Electronic EPASS System!

EPASS System – Major Updates

- Major enhancements:
 - Preliminary Proposals may now be routed through the EPASS System



The screenshot shows a web form titled "New Proposal". It includes a "PI" dropdown menu with the text "Select PI ..." and a link to "Click here for a list of Admins". A red box highlights the question: "Are you submitting a Preliminary Proposal (Letter of Intent/White Paper/Step-1 (NASA))?" with radio buttons for "Yes" and "No". Below this are fields for "Due Date", "Time (Pacific)", and "Deadline Type" (with a dropdown menu).

- Dynamic document upload throughout the EPASS system
- Ability to send additional email reminders for signatures still in the queue
- Increased the number of Co-PIs allowed on a single EPASS record

EPASS System – Updates

- Ability to add comments when sending to Proposal Intake/ OCGA (separate from EPASS remarks)
- Streamlined navigation to resubmit corrected EPASS records to Proposal Intake/OCGA

The screenshot shows the 'Sponsor Information' page in the EPASS system. At the top, there is a navigation bar with tabs for 'Investigators', 'Department', 'Proposal', 'Types', 'Sponsor', 'Checklist', 'Forms', 'Funds', 'Attachments', 'Review', and 'Log'. The 'Sponsor' tab is currently selected. In the top right corner, a blue button labeled 'Send to OCGA' is highlighted with a red box, and a red arrow points to it from the left. Below the navigation bar, the page title 'Sponsor Information' is followed by a link to 'EPASS Instructions' with a PDF icon. The 'PI:' field is partially filled with a greyed-out value. The main content area is titled 'Sponsor Information (entity which will provide funding directly to UCLA)'. It includes a 'Select a sponsor' dropdown menu with '100 Women in Hedge Funds' selected. Below this is a link: '(Click [here](#) if sponsor is not in the list)'. There are input fields for 'Contact (if known)', 'Email Address', and 'Phone Number'. A 'URL for Sponsor Homepage' field is also present. At the bottom, there are fields for 'Sponsor Due Date' (1/27/2023) and 'Time (Pacific)' (12:05am).

EPASS Training Updates – OCGA Monthly Training

**Filling out the EPASS:
What is it, when is it
required and how to
complete**

March 15, 2023
at 9:30 - 11:30 a.m.

Webinar

[Detail Info. &
Registration](#)

Electronic EPASS System

March 22, 2023
at 9:00 - 11:00 a.m.

Webinar

[Detail Info. &
Registration](#)

NEW!

New session for the Electronic EPASS System!

This session will go hand in hand with “Filling out the EPASS” Session and will walk through the functionality, validations and routing of proposals through the EPASS System.

Register at: <https://ocga.research.ucla.edu/training-calendar/>

EPASS Announcements

Deadline for **ALL Campus Departments** to be onboarded in the Electronic EPASS System:

July 31, 2023

All proposal submissions to OCGA must be via the EPASS System after 7/31/2023.

Email proposal submissions to Proposal Intake will not be accepted.

EPASS Onboarding Deadline

In preparation to meet this campus onboarding deadline of **July 31, 2023**, there will be electronic EPASS System demonstrations leading up to the deadline, beginning April 4, 2023.

The full list of demonstration dates, times and registration information may be found at:

<https://epassonlinesystem.eventbrite.com>

ORIS will be walking through the system, its validations and routing requirements. OCGA representatives will be available to answer questions.

We highly encourage those departments that have not yet onboarded to register!

EPASS Onboarding Deadline

Are you ready to be onboarded? Great!

For those departments that would like be onboarded in the EPASS System: Please email EPASSHelp@research.ucla.edu to initiate the process.

- ❖ **The Onboarding session/walkthrough takes only a couple of hours!**
 - ❖ **Departments then provide the specific routing as per their requirements**
 - ❖ **Initial routing and input of users is completed by ORIS**
 - ❖ **Once onboarded, controls on internal routing are then handed over to the department**
 - ❖ **Personnel changes etc. are managed by the department**
 - ❖ **EPASS Help is always available for guidance!**

Questions?

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

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We're happy to assist!

OCGA Website Updates



Draft Salary Scales for Proposal Budgeting now live on the OCGA Website!

Please visit <https://ocga.research.ucla.edu> for the link

The screenshot shows the top navigation bar of the OCGA website. It includes the UCLA Research Administration logo, a search icon, and several menu items: Home, About OCGA, Hot Topics, Proposals / Awards / Outgoing Subawards, Resources, and Submit to OCGA. Below the navigation bar is a 'Welcome to OCGA' section. At the bottom of the page, a pink banner contains the text: 'DRAFT Salary Scales for Proposal Budgeting, see <https://ocga.research.ucla.edu/budgets/#salary>'. A red arrow points from the URL in the banner to the right.



The screenshot shows a page titled 'DRAFT Salary Scales'. The main text reads: 'The [DRAFT Salary Scales](#) for proposal preparation is available.' Below this is a 'Resources' section with a list of links: F&A Agreement, Budget Training Modules, GSR Fees, and Composite Benefit Rates. A red box highlights the 'DRAFT Salary Scales' link in the main text.