What is eProposal?	**eProposal is UCSF's new web-based software to support the full life cycle of proposal preparation.** It includes: identifying funding opportunities; creating the proposal, budget and all forms; routing for PI, departmental, and institutional review and approval; submitting to sponsor (including system-to-system to Grants.gov); and managing selected post submission documents and communications to prepare for post award activities set-up. It will complement our **CACTAS** system and eventually replace our pre-award **OSR approval form** and the **Cayuse** system once the campus has fully transitioned to eProposal. At the end of this note we provide ***Benefits at A Glance***.
When did it go live?	**eProposal went live in a "soft launch" on December 9, 2013.** Those proposals that have already begun in current systems will be completed in those current systems to avoid any rework required of the proposal preparers (PIs, RMS, others).
Who does eProposal impact?	<u>**RMS staff and managers**</u> will be able to do things more efficiently by using one integrated system. Initially, this will require working in either the current or new system to accommodate proposals already started. They will also need to learn the new system. ***Thank you to our customers for your understanding during this transition period.*** <u>**Principal Investigators (PI)**</u> will be able to complete online reviews and provide online approval. Proposal analysts will continue to support PIs as they do today. <u>**Department Chairs / Delegates**</u> will receive automatic notification of the need to provide online review and approval. <u>**Post Award Analysts**</u> will have online access to all proposal documents to support post award set up and management functions.
What systems are going away?	Eventually, eProposal will replace the OSR approval form and Cayuse. During the transition period, in keeping with the principle of minimizing duplicate work, proposals started in the current systems will be completed in those systems.
Where do I get more information?	Visit the RMS website at http://osr.ucsf.edu/eproposal and the system help website at https://iris-help.ucsf.edu

eProposal Benefits at a Glance

- ✓ Combines functions currently done in separate systems (Proposal Express and Cayuse for Grants.gov) into **one integrated system**

- ✓ Supports the preparation and management of all proposals, including **system-to-system** Grants.gov submissions and **non system-to-system** proposals, staging critical proposal data for award set up

- ✓ Provides **automated routing and review** functions for PI (including multiple PIs), Chair (including multiple Chairs), and institutional approval

- ✓ Through use of **reusable system profiles and automated interfaces** with key UCSF systems and data, creates efficiencies and improved quality in proposal data related to compliance, personnel salaries and salary caps, F&A rates and base codes, and general sponsor information

- ✓ Delivers a custom-built **robust budgeting tool** to support and automate escalation assumptions, salary cap considerations, cost sharing, F&A and base code selection and automated calculations, fringe benefits calculations, budget justification, and multiple budget versions to model scenarios on these and related items. Budget tool is integrated with a **project personnel area** to attach bio-sketches and related documentation and populate and manage how key personnel data appear on the Grants.gov forms

- ✓ **Integrates with our CHR system** delivered by the same vendor with a single log-on to manage study protocol and proposal activity

- ✓ Proposal preparers and collaborators can more easily **determine the status** of what has been completed, the communications that have been exchanged, and where the proposal is in the review process

- ✓ Provides additional **step-saver functionality** such as copying prior proposals and budgets and leveraging initial proposal data for continuations, supplements, renewals, and no cost extensions

Reminder that benefits delivered by new technology are reaped over time as users master the system and refine business processes to maximize efficiencies.