Step-by-Step: Fellowships

STEPS FOR ENTERING FELLOWSHIPS IN EPD

**General Info Screen:** On the General Info Screen, begin by entering all the required information. When selecting the ‘Anticipated Award Type’, choose ‘Fellowship’ from the dropdown menu.

![General Info Screen]

**Investigator/Key Person Screen:** The proposed ‘fellow’ will be entered as the Principal Investigator (PI) on all Fellowship Proposals. The faculty member overseeing the ‘fellow’ will be entered as a Co-Investigator (Co-I) OR as a Key Study Person with a description of mentor or sponsor, based on the Agency/Sponsor providing the fellowship funding.

**NOTE:** If you are unable to find the Fellow within EPD, a Department Sponsored Affiliate account may be required. Please review the Adding non-UCSD Employees to Coeus EPD SOP and then work with your departmental DSA to request this account. If you are unsure who your DSA is, please use the DSA Lookup Tool.

**Co-Investigator (Co-I):** If the Agency/Sponsor providing the funding requires a PHS or 9510 Conflict of Interest disclosure, enter the faculty member as a Co-Investigator (Co-I).
Key Study Person (Mentor/Sponsor): If the Agency/Sponsor providing the funding is non-federal, enter the faculty member as a Key Study Person with Key Person Role of ‘mentor’ or ‘sponsor’. A 700U Conflict of Interest disclosure is NOT required for fellowships.

Departments will be required to enter a special review line in EPD for 700U sponsors. The SPO Analyst will change the status from “Pending” to “Not Required” in COEUS Institute Proposal (IP).

PI Exception: The PI Exception Questionnaire will be triggered in EPD based on the title code given to the ‘fellow’. Answer “yes” to the PI Exception Questionnaire. Add a Special Review line for PI Exception. The SPO Analyst will update the status to “not required”. NOTE: PI Exceptions are not required for Fellowships.
Routing for Approvals:

**SIO-OCGA & HS SPPO:** Fellowship proposals will follow their normal routing process and current analyst routing model.

**General Campus & Graduate Division:** The Aggregator will “Submit for Approval” but will **NOT approve** the proposal. EPD will send a notification to the OCGA and Grad Division offices. The appropriate SPO office will accept the proposal for review & bypass departmental approvals or reject the proposal if changes are required by the department.

**NOTE:** Institutionally, department approvals are not required for Fellowships. Each department can institute their own policies as to who should approve and work with their SPO office to implement.