Sharecase
March 26, 2014

Beatrice Dormoy, Project Manager
Nicole Joyce, Training & Communications
What is ePD?
**ePD (Electronic Proposal Development)**

Web based system for departments and proposal creators to...

- Create, upload, route, approve, and store sponsored research proposals
- Improves, automates, streamlines and standardizes business processes for departments and central offices
- Integrate with Coeus enterprise databases, data warehouse and sub-systems
ePD – Coeus Enterprise
Research Administration Systems

COEUS SYSTEM MODULES

- ePD
  - (Depts.)
- Institute Proposal
  - (Central SPOs)
- Award
  - (Central SPO’s & OPAFS)

Currently In Use

Data Warehouse & Other Downstream Systems

Reports/Data Available for Campus Consumption
...who else is using it?

...just to name a few
5 Things to Know About ePD
5 Things to Know About ePD

1. Replaces Proposal Log, RES, PI Assurance and Lobbying/Debarment Forms
2. Electronic routing and approval replaces ink signatures
3. Repository for all proposal documents
4. Web based system allows 24/7 transparency into the record, online collaboration and remote access
5. SPO Analysts still submit according to sponsor requirements (via Fastlane, Grants.gov, etc.)
...and ePD will never hold up a sponsor deadline
A Quick Tour...
Key Contributors

- **Departments (Pilot)**
  - San Diego Super Computer (SDSC)
  - Physics
  - Marine Physical Laboratory (MPL)
  - Neurosciences
  - Health Sciences Research Shared Services

- **Central Offices**
  - Office of Contracts and Grants (OCGA)
  - Scripps Institution of Oceanography - Office of Contracts and Grants (SIO-OCGA)
  - Health Sciences Sponsor (HS SPPO)
  - Office of Clinical Research Administration (OCRA)

- **Additional Central Offices**
  - Office of Post Award Financial Services (OPAFS)
  - Conflict of Interest (COI)

- **Real PI’s and Chairs**
When is it coming?
We Are Here

- Beta Fixes, Migration, Access Provisioning & Set up
- Quality Assurance (QA) Environment, QA Team Testing
- Pilot Production Pilot Start: Wave 1 - OCGA, SDSC & Physics
- Additional Offices *NEW*

- QA User Acceptance Testing with Departments & Central Offices

- Pilot Production cont’d: Wave 2 - HS SPPO, OCTA, Neuro
- Pilot Production cont’d: Wave 3 - SIO, MPL

- Campus-wide Rollout Cont’d – Production Wave A, B, C...

Updated Mar. 2014
Onboarding Strategy: Rolling out ePD

• Onboarding Strategy Team
  o Karen Andrews (Physics)
  o Alma Palazzolo (SDSC)
  o Patty Camacho (Neurosciences)
  o Anne Footer (MPL)
  o SPO Office Directors (OCGA, SIO OCGA, HS SPPO and OCTA)

• Reviewed 129 proposal submitting units (past 5 years)
  o Average Volume Units First
  o Very Large and Complex Units Next
  o Very Low Volume Units Last

• Developing Faculty/PI Specific Outreach Plan
  o Spearheaded by Sandra Brown and Marianne Generales
<table>
<thead>
<tr>
<th>Production Pilot</th>
<th>Spring 2014 – Winter 2014</th>
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<tbody>
<tr>
<td><strong>Wave 1</strong></td>
<td></td>
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<tr>
<td>OCGA</td>
<td>End April – Beginning June</td>
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<tr>
<td>SDSC</td>
<td>Beginning May – Mid June</td>
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<tr>
<td>Physics</td>
<td>Beginning May – Mid June</td>
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<td>OPAFS</td>
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<td>EH&amp;S</td>
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<td>Subaward Team</td>
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<td>Conflict of Interest (COI)</td>
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<tr>
<td>IACUC Office</td>
<td>Mid June – End July</td>
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<td>Academic Affairs Space</td>
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<td>PI Exceptions People</td>
<td></td>
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<td>Human Research Protection Program</td>
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<tr>
<td><strong>Wave 2</strong></td>
<td>July – Sept</td>
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<tr>
<td>HS SPPO</td>
<td>End July – Beginning Sept</td>
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<td>OCTA</td>
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<td>Neurosciences</td>
<td>Beginning Aug – Mid Sept</td>
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<td><strong>Wave 3</strong></td>
<td>Sept – Nov</td>
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<tr>
<td>SIO - OCGA</td>
<td>Mid Sept – End Oct</td>
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<tr>
<td>MPL</td>
<td>End Sept – Mid Nov</td>
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<tr>
<td><strong>Campus-wide Rollout</strong></td>
<td>Beginning 2015 – Summer 2016</td>
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<tr>
<td>Production Wave A</td>
<td>TBA</td>
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<tr>
<td>Production Wave B</td>
<td>TBA</td>
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<tr>
<td>Production Wave C</td>
<td>TBA</td>
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If you are NOT one of the Pilot Units you don’t have to worry because....

Campus-wide rollout & onboarding start in 2015
How do I prepare?
Preparing Your Area

**ePD Team will:**

- Provide advanced notice and outreach about upcoming waves and onboarding
- Meet with units individually to identify potential users and determine levels of access
- Offer dedicated training
- Have a dedicated help desk
- Pass along best practices and SOPs
- Make all information available at [epd.ucsd.edu](http://epd.ucsd.edu)
ePD is brought to you by...

Electronic Research Administration Program (eRAP)
2:30 p.m.–3:15 p.m. Red Shoe Room
Get this PowerPoint and Additional Info at:

epd.ucsd.edu
Thank You!