Cayuse SP: Entering Proposals/IPFs

-SPO BAASICS-
August 13, 2020
Presented by Kassie M. Obelleiro
Sponsored Programs Training Officer
Learning Objectives

01 Proposal Process
Know the proposal process for extramural funding at UC Davis

02 IPFs
Understand the purpose of Internal Processing Forms (IPFs)

03 IPF Routing
Know the IPF routing and approval process

04 Statuses
Know how to identify and understand IPF statuses
Zoom Instructions
Zoom Instructions - Annotations

01 At the top of this screen:
Select “View Options”
Select “Annotations”

02 Choose a stamp
Select “Stamp”
Choose (click) any stamp

03 Practice
Put your stamp in the box to the left
Cayuse Overview
Cayuse SP and 424 Functions
Cayuse

Cayuse SP
Internal routing and approval

Cayuse 424
Application submission to most Federal sponsors

System Administration
Unit Roles list and System Administration applications

Cayuse Research Suite
3.7.2

Research Administration Modules
- Cayuse SP (Sponsored Projects)
- Cayuse 424

System Administration Applications
- Backbone
- Research Contacts
- Workflow

Application Help
- Research Suite Support Center
Cayuse SP

Proposal and Award Modification Routing
Lead PI and co-PI certification
Department Chair and Dean authorization
SPO approval

Award Record Repository
Record of proposals, awards and subawards

Advance Account Request Routing
Department Chair endorsement
SPO approval
Cayuse SP Dashboard

Create an Internal Processing Form (IPF)
  • Proposal
  • Some Award Modifications

View Proposals where you are:
  • The Proposal Owner
  • On the Investigators/Research Team

View Proposals where you have Proposal Data Access (for the Admin Unit)

Approve/Endorse Advance Account Requests
  • Pre-Award Spending Approver

View Awards where you are on the Investigators/Research Team

View Awards where you have Award Data Access (for the Admin Unit)

Certify Proposals where you are the Lead PI or co-PI

Approve/Authorize IPFs as Unit Head
  • Admin Unit
  • Units on Investigator/Research Team tab
Internal Processing Forms (IPFs)
Submit an IPF for proposals and some significant award amendments
Internal Processing Forms (IPFs)

• Internal routing and approval form at UC Davis
• Lead PI and co-PI provide confirmation they are supportive of the project before SPO assignment
• Unit Head and Dean, if required, approval of:
  • Proposal submission to sponsor
  • Cost-shared effort
Internal Processing Forms (IPFs)

01 Proposals
- New
- Competitive Renewals
- Resubmissions
- After-the-Facts

Routes to SPO Proposal team
Except, ATFs route to SPO Award team

02 Significant Award Amendments
- Change in Principal Investigator
- Change in Administrative Unit
- Change in Cost-Sharing

Routes to SPO Award team
<table>
<thead>
<tr>
<th></th>
<th>IPF</th>
<th>No IPF</th>
</tr>
</thead>
<tbody>
<tr>
<td>A proposal to NIH for a new submission.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>A proposal to NSF for a resubmission.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>A change in PI request.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>A progress report to USDA.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Is an IPF Needed?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>------------------</td>
<td></td>
<td></td>
</tr>
<tr>
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<td></td>
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</tbody>
</table>
Cayuse SP

Guidelines
Follow and check the status online.

Contact your assigned analyst for more information.

Subaward Analyst is listed in Subcontract Notes.

Follow the Rules
Provide required information & documents

Use the Resources
Review the Handbooks and the IPF pages

Confirm IPF Approvers
All Approving Units require an IPF Approver

Monitor Routing
Check the Status and ensure received by SPO at least 5 business days before deadline
Minimum Proposal Documents for SPO Assignment

**Completely Routed and Authorized IPF**
Complete IPF with Lead PI and co-PI Certifications and IPF Authorizations

**Budget Spreadsheet**
Strongly encouraged even if NOT required by the sponsor

**Budget Justification**
Strongly encouraged even if NOT required by the sponsor

**Scope of Work**
May submit a draft and provide the final before submission to sponsor
Demo: Entering an IPF in Cayuse SP
### Approving Units

**List of Approving Units:** (to edit the information, remove first, then add back)

<table>
<thead>
<tr>
<th>Routing Order</th>
<th>Unit Code</th>
<th>Unit</th>
<th>Role(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>049231</td>
<td>Med: Intl Med- Infectious Disease</td>
<td>Admin Unit, Lead Principal Investigator, Investigator Rollup From - 049231</td>
</tr>
<tr>
<td>2</td>
<td>20</td>
<td>Med: Intl Med (Use the PI's Int Med Dept.)</td>
<td>Rollup From - 049231</td>
</tr>
<tr>
<td>2</td>
<td>43</td>
<td>School of Medicine (Use 049000)</td>
<td>Rollup From - 20</td>
</tr>
</tbody>
</table>

[Authorize Unit Listing]
## Approving Units

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</tr>
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<td>3</td>
<td>43</td>
<td>School of Medicine (Use 049000)</td>
<td>Rollup From - 20</td>
</tr>
</tbody>
</table>

[Authorize Unit Listing]
Enter an IPF

1. Login to Cayuse SP UAT: https://ucdavis-uat.cayuse424.com
   • Username: amieadmin
   • Password: training

2. Select “Cayuse SP”

3. Select “Start New Proposal”

4. Complete a Proposal/IPF based on the proposal scenario and budget.
   • Enter your name or initials in the “Short Project Name” field
     ✓ Ensures your partial SDPS credit for the class

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**Project Title:** Socio-ecological factors in Malaria transmission

**Sponsor:** National Institutes of Health NIAD; RFA: NIH NIAD PA-EN-R01

**Sponsor Deadline:** 5 business days from today (5 pm local time).

**Admin Unit:** Ecology

**Project Dates:** January 1, 2021 – December 31, 2024

**IRB Application #:** 123456, approved 12/10/19

**IACUC Protocol:** 235678, approved 11/1/19

**Location of sponsored activity:** Animal Husbandry Beef Barn (75%); DNA Technologies & Express Analysis Cores (25%)

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### PERSONNEL

<table>
<thead>
<tr>
<th>Line Item</th>
<th>Year 1</th>
<th>Total Project</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salary</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Salary for Charlie Apple, PI – 3% Effort, 0.36 Person Months</td>
<td>$4,244</td>
<td>$22,530</td>
</tr>
<tr>
<td>Salary for Kassie Obelleiro, co-PI – 3% Effort, 0.36 Person-Months</td>
<td>$3,501</td>
<td>$18,587</td>
</tr>
<tr>
<td><strong>Salary Total</strong></td>
<td><strong>$7,745</strong></td>
<td><strong>$41,117</strong></td>
</tr>
<tr>
<td>Benefits</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Charlie Apple, PI</td>
<td>$1,672</td>
<td>$9,449</td>
</tr>
<tr>
<td>Kassie Obelleiro, co-PI</td>
<td>$1,379</td>
<td>$7,793</td>
</tr>
<tr>
<td><strong>Benefits Total</strong></td>
<td><strong>$3,051</strong></td>
<td><strong>$17,242</strong></td>
</tr>
<tr>
<td><strong>PERSONNEL TOTAL</strong></td>
<td><strong>$10,796</strong></td>
<td><strong>$58,359</strong></td>
</tr>
</tbody>
</table>

### OTHER EXPENSES

<table>
<thead>
<tr>
<th>Line Item</th>
<th>Year 1</th>
<th>Total Project</th>
</tr>
</thead>
<tbody>
<tr>
<td>DNA Analysis Services</td>
<td>$2,000</td>
<td>$10,000</td>
</tr>
<tr>
<td><strong>OTHER EXPENSES</strong></td>
<td><strong>$5,000</strong></td>
<td><strong>$10,000</strong></td>
</tr>
</tbody>
</table>

### EQUIPMENT

<table>
<thead>
<tr>
<th>Line Item</th>
<th>Year 1</th>
<th>Total Project</th>
</tr>
</thead>
<tbody>
<tr>
<td>MRI</td>
<td>$25,000</td>
<td>$25,000</td>
</tr>
<tr>
<td><strong>EQUIPMENT TOTAL</strong></td>
<td><strong>$25,000</strong></td>
<td><strong>$25,000</strong></td>
</tr>
<tr>
<td><strong>TOTAL DIRECT COSTS</strong></td>
<td><strong>$37,796</strong></td>
<td><strong>$88,980</strong></td>
</tr>
<tr>
<td>Indirect Cost Base</td>
<td>$12,796</td>
<td>$63,980</td>
</tr>
<tr>
<td>Indirect Costs (Rate 57%)</td>
<td>$7,294</td>
<td>$34,469</td>
</tr>
<tr>
<td><strong>TOTAL PROJECT COSTS</strong></td>
<td><strong>$45,090</strong></td>
<td><strong>$125,449</strong></td>
</tr>
</tbody>
</table>
Proposal Routing and Approval
Routing and approval process and statuses
Required Certifications and Approvals

Internal Processing Forms serve as documentation of certifications and approvals.

Certifications
Lead Principal Investigators and co-Principal Investigators

Authorizations
Unit heads and deans, if applicable, of the administering unit and “home” units of personnel on the Investigators/Research Team

Approval
Sponsored Programs, as the admin office
Proposal Review Types

**Full Review ≥ 5 Business Days**
- Campus & sponsor requirements
- Financial & regulatory compliance
- PI & institutional eligibility
- Terms & conditions, if applicable
- **Submission**: Final packages should be submitted to SPO two business days prior to submission deadline (preferred); at a minimum, three hours prior to submission deadline

**Limited Review < 5 Business Days**
- Indirect cost rate, based on information as submitted
- Additional items as time may allow
- Reserve right to negotiate at time of award
- **Submission**: As soon as practicable, although we cannot guarantee an error-free submission or that the submission will be completed due to factors such as volume or system issues

**No Review**
- No review
- Reserve right to negotiate at time of award
- **Submission**: As soon as practicable, although we cannot guarantee an error-free submission or that the submission will be completed due to factors such as volume or system issues

Sponsored Programs is open from 8:00 a.m. to 5:00 p.m. All proposals must be submitted to sponsors before 5:00 p.m., even if the sponsor has listed a later submission time.
<table>
<thead>
<tr>
<th>Role</th>
<th>Person Must Certify</th>
<th>Person’s Unit Head Must Authorize</th>
</tr>
</thead>
<tbody>
<tr>
<td>Investigator</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Principal Investigator (co-PI)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Proposal Editor</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lead Principal Investigator</td>
<td></td>
<td></td>
</tr>
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<td>Person Must Certify</td>
<td>Person’s Unit Head Must Authorize</td>
</tr>
<tr>
<td>-------------------------------------</td>
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<td>-----------------------------------</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Proposal Editor</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lead Principal Investigator</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Demo: Checking IPF Status and SPO Assignment

Find the IPF from My Proposals or Proposals in My Unit

<table>
<thead>
<tr>
<th>Proposal ID</th>
<th>PI Name</th>
<th>Project Name</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>2023-001</td>
<td>John Smith</td>
<td>Research Project</td>
<td>Submitted</td>
</tr>
<tr>
<td>2023-002</td>
<td>Jane Doe</td>
<td>Development</td>
<td>Approved</td>
</tr>
<tr>
<td>2023-003</td>
<td>Alex Johnson</td>
<td>Innovation</td>
<td>Pending</td>
</tr>
<tr>
<td>2023-004</td>
<td>Emily Davis</td>
<td>Engineering</td>
<td>Rejected</td>
</tr>
</tbody>
</table>

*Note: This table is a mock-up of a proposal database screen.*
<table>
<thead>
<tr>
<th>Record Type</th>
<th>Status</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Proposal</td>
<td>Submitted to Sponsor</td>
<td>Proposal has been submitted to the sponsor</td>
</tr>
<tr>
<td></td>
<td>Withdrawn</td>
<td>Proposal withdrawn by PI</td>
</tr>
<tr>
<td></td>
<td>Not Funded</td>
<td>Proposal not funded by the sponsor</td>
</tr>
<tr>
<td></td>
<td>JIT Request Received</td>
<td>SPO or PI received a JIT request from the sponsor</td>
</tr>
<tr>
<td></td>
<td>JIT Request Approved</td>
<td>SPO has approved the JIT information provided by the PI/department</td>
</tr>
<tr>
<td></td>
<td>JIT Request Unsubmitted</td>
<td>The PI decided not to submit JIT information</td>
</tr>
<tr>
<td></td>
<td>Funded</td>
<td>Notice of Award received by the sponsor (This does not mean the award has been executed)</td>
</tr>
</tbody>
</table>
# Cayuse SP Statuses

<table>
<thead>
<tr>
<th>Record Type</th>
<th>Status</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Proposal</td>
<td>Unsubmitted</td>
<td>Not submitted for routing</td>
</tr>
<tr>
<td></td>
<td>Dept Approval in Process</td>
<td>Pending IPF approvals</td>
</tr>
<tr>
<td></td>
<td>Admin Office in Process</td>
<td>Received by SPO but not assigned</td>
</tr>
<tr>
<td></td>
<td>PS Review</td>
<td>Under review by Proposals Analyst</td>
</tr>
<tr>
<td></td>
<td>CS Review</td>
<td>Under review by Awards Analyst</td>
</tr>
<tr>
<td></td>
<td>Proposal Approved</td>
<td>Proposal approved for submission to sponsor</td>
</tr>
<tr>
<td></td>
<td>Proposal Reopened</td>
<td>Proposal reopened for department to edit</td>
</tr>
</tbody>
</table>
# Cayuse SP Statuses

<table>
<thead>
<tr>
<th>Record Type</th>
<th>Status</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Award</td>
<td>Active</td>
<td>The award has been fully executed and routed to Contracts and Grants Accounting</td>
</tr>
<tr>
<td></td>
<td>Pending</td>
<td>The award is not fully executed</td>
</tr>
<tr>
<td>Subaward</td>
<td>(Awaiting) Admin Dept</td>
<td>Action is required by the PI/department</td>
</tr>
<tr>
<td></td>
<td>(Awaiting) Award Mgr/Analyst</td>
<td>Action is required by the Award Analyst</td>
</tr>
<tr>
<td></td>
<td>(Awaiting) Subcontractor</td>
<td>Action is required by the Subrecipient</td>
</tr>
<tr>
<td></td>
<td>Fully Executed</td>
<td>The Subaward is fully executed and has been sent to CGA</td>
</tr>
</tbody>
</table>
Proposal Routing Status

Proposal: 20-2625
Project: A21-0730
Lead PI: Charlie Apple
Admin Unit: Med. Intl Med. Allergy
Project Title: SPD5 Class Sample - Do not delete

Sponsor: NIH National Institute of Allergy and Infectious Diseases (NIAID)
Submission Deadline: 6/11/2020

Prime Sponsor:
Instrument Type: Grant
Specialists: Kassie Obelleiro, Kassie Obelleiro

Proposed Begin-End Dates: 1/16/2020 - 1/23/2020
Proposed Total Amount: $2,641,075.00

The above proposal has been successfully submitted. All lead/principal investigators and approving units listed below have been notified and should electronically authorize (in routing order for units) this proposal before it is received by the UC Davis Sponsored Programs Office.

Investigator(s) who must certify this Proposal

<table>
<thead>
<tr>
<th>Investigator</th>
<th>Role</th>
<th>Decision</th>
</tr>
</thead>
<tbody>
<tr>
<td>Charlie Apple</td>
<td>Lead Principal Investigator</td>
<td>Certified on 01/09/2020 11:05 AM PST</td>
</tr>
</tbody>
</table>

Unit(s) that must authorize this proposal

<table>
<thead>
<tr>
<th>Order Unit</th>
<th>Authorizing Person(s)</th>
<th>Authorizing Decision</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Med. Intl Med-Allergy</td>
<td>Kaitlyn Kirk, Merrill Gershwn, Charlie Apple</td>
<td>Authorized By Charlie Apple on 01/09/2020 11:06 AM PST</td>
</tr>
<tr>
<td>2 Med. Intl Med (Use the PI's Intl Med Dept)</td>
<td>Timothy Albertson, Monique Vasquez</td>
<td>Not Yet Reviewed</td>
</tr>
<tr>
<td>3 School of Medicine (Use 049000)</td>
<td>Anurad Erdemblieq, Tammi Olinika, Tasika Johnson, Randi Freeman</td>
<td>Not Yet Reviewed</td>
</tr>
<tr>
<td>4 UC Davis Sponsored Programs Office</td>
<td>Admin Office</td>
<td></td>
</tr>
</tbody>
</table>

Status History

<table>
<thead>
<tr>
<th>Status</th>
<th>Person</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Changed to: Funded</td>
<td></td>
<td>2/19/2020, 4:37 PM PST</td>
</tr>
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Learning Objective Review

01 Proposal Process
Know the proposal process for extramural funding at UC Davis

02 Internal Processing Forms (IPFs)
Understand the purpose of Internal Processing Forms (IPFs)

03 IPF Routing
Know the IPF routing and approval process

04 Statuses
Know how to identify and understand IPF statuses
Questions

1. What does the proposal team verify for RCI – COI during the proposal process; if form 800 is created in the ecoi system if the proposal requires one?

2. When is the project folder created for the proposal.

3. How is the after the fact award entered; will there always be at least a proposal shell created.

4. Does the proposal team verify anything if there are animal subjects at the proposal stage; i.e. IACUC protocol in process?
Contact Us


Sponsored Programs
Office of Research
University of California, Davis
https://research.ucdavis.edu/proposals-grants-contracts/spo/

Tel: +530 754 7958
Email: kobelleiro@ucdavis.edu

Kassie M. Obelleiro
Training Officer
Resources
Common Acronyms

- AB20: Assembly Bill 20
- BAA: Broad Agency Announcement
- BUA: Biological Use Approval
- CGA: Contracts and Grants Accounting
- COI: Conflict of Interest
- ERA: Electronic Research Administration
- F&A: Facilities & Administrative rates; also referred to as indirect cost rate (IDC or ICR) or “overhead”
- FOA: Funding Opportunity Announcement
- GMS: Grant Management System
- HASTOC: Human Anatomic Specimens and Tissue Oversight Committee
- IACUC: Institutional Animal Care and Use Committee
- IPF: Internal Processing Form
- IP: Intellectual Property

- IRB: Institutional Review Board
  - PI: Principal Investigator
  - RCI: Research Compliance and Integrity
  - RCR: Responsible Conduct of Research
  - RFA: Request for Applications
  - RFP: Request for Proposals
  - PHS: Public Health Service
  - PRAM: Progress Report Additional Materials (NIH)
  - RPPR: Research Performance Progress Reports
  - SBIR: Small Business Innovation Research
  - SNAP: Streamlined Non-Competing Award Process (NIH)
  - SPO: Sponsored Programs unit in the Office of Research
  - STTR: Small Business Technology Transfer
Sponsor Resources

• National Institutes of Health (NIH) Application Guide
• National Science Foundation (NSF) Preparing Proposals
• US Department of Agriculture (USDA): “Apply for Grant”
• National Endowment of the Humanities (NEH): “How to Write a Successful Level I DHAG Proposal”
• Links to Other Funding Sources
UC Davis Resources

- **Funding Opportunities and Limited Submissions Program, Office of Research**
- **Proposal Preparation Checklist**: Applicable to all proposals materials
- **Interdisciplinary Research Support (IRS) unit**
  - Templates and Samples
- **Call for Proposals Checklist**: Consider using the checklist during review of the sponsor guidelines
- **Proposal Preparation and Submission Toolkit**
- **Senior/Key Personnel Descriptions**
- **NSF Biosketch Tipsheet**
- **Preparing a Proposal Budget Toolkit**
- **Budget Justification Checklist**
- **Guidance for submitting proposals/IPFs that involve cost sharing**
- **Cayuse SP Instructions**
  - Cayuse SP Quick Reference
  - Cayuse SP Quick Start Guide for Principal Investigators and Departmental Staff
  - Cayuse SP Handbook for Department Contract & Grant Staff, Principal Investigators and Approvers
  - Cayuse SP Interactive How-to Guide Written Instructions
- **Subaward Processing Checklist – Departments/Principal Investigators**
- **Handbook for Submitting a Proposal with Subawards**
- **Table: Subrecipient, Contractor/Vendor, Consultant?**
- **Subaward or Contractor (Vendor) Guidance**
- **Sponsored Programs Research Administration Kiosk (SPARK) Website**
Sponsored Programs Contacts

- SPO Contact Us webpage: http://research.ucdavis.edu/contact-us/sponsored-programs/
- Proposals: proposals@ucdavis.edu
- Awards: awards@ucdavis.edu
- Subawards: subawards@ucdavis.edu
- Closeouts: closeouts@ucdavis.edu
- eRA Help: SPOeRAhelp@ucdavis.edu
- Cayuse Help Desk: ORCayuseHelp@ucdavis.edu
- Training: SPOTraining@ucdavis.edu
Office of Research Listservs

- C&G Listserv: https://lists.ucdavis.edu/sympa/info/ovcr-cg
- Other Office of Research Listservs: http://research.ucdavis.edu/resources/listserv-subscriptions/
  - Core Facilities Program
  - Digital Millennium Copyright Act (DMCA)
  - Funding
  - Institutional Review Board (IRB)
  - Research Compliance and Integrity (RCI)
  - Responsible Conduct of Research (RCR)
  - Research Unit Lists
- SPARK: https://lists.ucdavis.edu/sympa/subscribe/spark_i
Forum for department research administrators to:

- **Ask questions** of campus research administration units
- **Provide feedback** regarding research administration services and processes
- **Hear updates** from campus research administration units, such as Contracts and Grants Accounting, Sponsored Programs, Research Compliance and Integrity, IRB Administration, IACUC, and others

Subscribe to the C&G listserv for updates and reminders: [https://lists.ucdavis.edu/sympa/info/crc-cg](https://lists.ucdavis.edu/sympa/info/crc-cg)

Additional meeting in April and May due to COVID-19

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Research Administration Forum

**FOURTH WEDNESDAY OF EACH MONTH**

8:30 – 10:00 AM

ZOOM: [https://zoom.us/j/958409717](https://zoom.us/j/958409717)

*No in person meeting until further notice due to Coronavirus ‘19*

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Watch previous forums on [YouTube](https://www.youtube.com)
Live and Recorded Learning Opportunities

SPO BAASICS
Budget, Application, Award and System Instruction for Comprehensive Skills (BAASICS) are training sessions designed to help contract and grant administrators at UC Davis build and hone their research administration skills. Learn more

Staff Development and Professional Services Classes
SPO offers classes in the Research Administration Certificate Series (RACS) and the ERA Train the Trainer certificate series.