RESEARCH FUNDING

User Guide

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Overview and Glossary

System Overview

The Research Funding system is the resource for research funding opportunities at UC Davis. UC Davis researchers may identify research funding opportunities and submit internal applications to limited submission, coordinated submission and select UC Davis administered funding programs. The entire application, review and selection process is conducted online – including the receipt of peer review feedback.

System Requirements

The Research Funding system requires users to access the system with one of the following browsers.

- Internet Explorer Version 9 or higher (preferred)
- Mozilla Firefox
- Google Chrome
- Safari
- Adobe Acrobat is also needed to convert documents to PDF format for uploading

Accessibility

Anyone with a UC Davis Kerberos ID has access to view funding opportunities. Investigators with principal investigator status automatically have access to submit internal applications and may delegate proxy status to others. External users may obtain access through the UC Davis Temporary Affiliate process: https://computingaccounts.ucdavis.edu/cgi-bin/taf/index.cgi.

To access the Research Funding system, log-in with your Kerberos ID and password at: https://researchfunding.ucdavis.edu.

Features

- Up-to-date, searchable lists of research funding opportunities.
- Online application submission for limited submission, coordinated submission and select UC Davis administered funding programs.
- Internal application revision until the deadline.
- Delegation of proxies to submit internal applications.
- Online access to status of internal applications and review feedback.

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Glossary

1. **Biosketch:** A biosketch is an abbreviated form of curriculum vitae (CV). The NIH or NSF form may be used as along as the page limit specified is met. In general, the limit is five pages.

2. **Coordinated Submission Program:** Opportunity for research or other funding that requires internal coordination even though the university may submit an unlimited number of applications. Such restrictions may include certification that multiple proposals are not duplicative or for similar equipment or projects.

3. **Department:** This field is used to indicate the department, office or unit the grant would be administered through if funded. The department associated with the PI's appointment is pre-populated but may be changed.

4. **Funding Opportunity of Special Interest:** Opportunity for research or other funding that does not require internal coordination. This can be from an external sponsoring agency or internal (UC) office/center/unit/program.

5. **Internal Application:** An internal application may be a concept note, pre-proposal or proposal.

6. **Internal Deadline:** The date internal (UC Davis) applications are due.

7. **Letter of Intent (LOI):** Advises a sponsor that a proposal will be submitted in response to their solicitation. The letter may contain general program information, unofficial cost estimates and a request for specific applications guidelines, instructions and forms.

8. **Limited Submission Announcement:** Request for pre-proposals to a limited submission program.

9. **Limited Submission Pre-Proposal**: Required application materials for internal (UC Davis) application to a limited submission program.

10. **Limited Submission Program:** Opportunity for research or other funding that specifies an allotted number of submissions allowed per an organization, department or school/college. These programs are coordinated by the Limited Submissions Program to identify which principal investigators should move forward with an application, preliminary proposal or proposal to the sponsor.

11. **Preliminary Proposal**: An abbreviated version of a proposal that is sometimes required by a sponsor as a precursor to the submission of a full proposal. This may also be referred to by the sponsor as a concept paper or white paper. In these instances, the sponsor often initiates invitations for a full proposal based upon review of the pre-proposals received.

12. **Program:** Opportunity for research or other funding. This can be administered by an external sponsoring agency or internal (UC) office/center/unit/program

13. **Principal Investigator (PI):** Typically, a faculty member who is submitting a proposal to a sponsor. The PI has primary responsibility for technical compliance, completion of programmatic work and fiscal stewardship of sponsor funds.

14. **Request for Applications (RFA)**: Announcement/request from a sponsor for applications to a specific program. The RFA instructions include the information necessary to complete the application and submission.

15. **Request for Proposals (RFP):** Announcement/request for a sponsor for proposals to a specific program. The RFP contains detailed information that must be supplied in and instructions for submitting a proposal.

16. **Review Committee:** A review committee consists of all reviewers assigned to a program announcement.

17. **Review Panel:** Some internal announcements may involve a group of reviewers (review panel) that are assigned a subset of applications to review. This may be based on subject areas or other categories. Multiple review panels may be used.

18. **Sponsor:** An external funding agency, which enters into an agreement with the institution to support research, instruction, public service or other sponsored activities. Sponsors include private businesses, corporations, foundations, other not-for-profit organizations, other universities and federal, state and local governments.

19. **Sponsor Deadline:** The date the application is due to the sponsoring agency.

20. **UC Davis Administered Program:** Opportunity for research or other funding that is being funded or administered by UC Davis on behalf of another sponsoring agency. Some of the programs are offered by the Office of Research while others are offered by other units at UC Davis.

21. **More terms can be found at:** http://ortraining.ucdavis.edu/glossary/

Quick Tips

1. Ensure that you can see the "Apply Now" and "I'm Interested" links on limited submission, coordinated submission and UC Davis administered program announcements.

2. Delegate proxy access before you submit your first application.

3. Begin the application process more than 24 hours before the internal deadline.

4. **Internal applications are due by 5:00 pm on the date of the internal deadline** given in the announcement. No technical support is available after 5:00 pm or on weekends.

5. All number fields only accept numeric values. Do not enter punctuation, special characters or text.

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Viewing and Applying to Funding Opportunities

Viewing Funding Opportunities

To Begin:

1. Log-in to Research Funding (https://researchfunding.ucdavis.edu).
2. Select the funding opportunity list you wish to view.

FUNDING OPPORTUNITIES

Limited Submissions

Coordinated Submissions

Funding Opportunities of Special
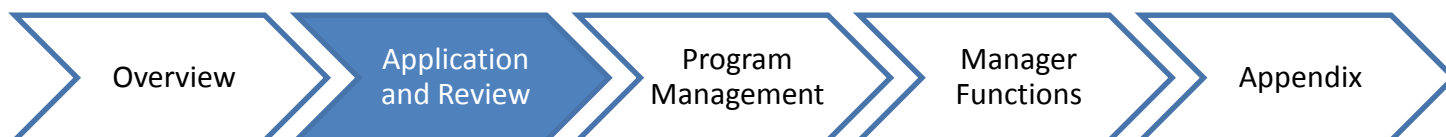Interest

UC Davis Administered Programs

Methods:

1. There are several ways to find a funding announcement.
    a. Search by announcement name.
    b. Search by the year of the sponsor deadline.
    c. Filter by search tags.
2. Select the program name to view the announcement information.

Creating Proxies

Principal investigators may delegate proxies to submit internal applications on their behalf.

1. Log-in to Research Funding (https://researchfunding.ucdavis.edu).
2. Go to the "My Applications" tab.
3. Select the "+" next to Proxies.
4. Begin typing the proxy's last name until the appropriate name appears.
5. Select the person you wish to delegate access.
6. Once the proxy is saved, his/her name will display under Proxies.

    Note: Delete a proxy by selecting the "x" next to the appropriate name.

Submitting an Internal Application

1. Log-in to Research Funding (https://researchfunding.ucdavis.edu).
2. Open the funding opportunity announcement and read it carefully.
3. Select "I'm Interested" to let the Limited Submission Program know you are planning to apply. The announcement will indicate if this is required. However, it is always encouraged.
4. Select "Apply Now" to begin the application. You do not need to complete the application in one sitting.
   a. Enter the project title.
   b. If you are a proxy, select the principal investigator for which you are applying.
   c. Select "Begin Application."
5. Complete the application overview page.
   a. You may enter an administrative contact to also receive email communications regarding this application.
   b. You may select a different administering department if the one populated is not the department that will administer the award if funded.
   c. The amount requested should be the total amount of the project.
   d. If you have previously applied or been nominated/selected, also upload your review panel summary and how you addressed the critiques (one-page maximum) as a separate attachment in the Project Description section on the Documents screen.
   e. If you will not be requesting a campus match, leave this field blank.
   f. Select "Next Section."
6. Enter the budget details (if displayed).
   a. This is a generic budget template. Enter the relevant line items and skip any that are not relevant or allowed.
   b. Select the "+" to add a line item under a category.
   c. Select "Enter" or "Tab" on your keyboard to save a line item. When a line item is saved, the associated amount will appear in Direct Costs.
   d. You may enter multiple line items under each budget category.
   e. Enter your Estimated Indirect Costs, if applicable.
   f. Select "Next Section."
7. Upload documents.
   a. Select the "+"under a document.
   b. Upload PDF versions of documents.
   c. Select the document from your computer and select "Open."
   d. Repeat for each document to upload.

8. Select "Complete Draft."
9. Select "Submit Pre-proposal" or "Submit Proposal" depending on the program type when complete.
    a. Once submitted, the status will change to Pending Review.
    b. You will receive an email confirming receipt of your application, and the application will remain accessible at the My Applications tab.

Revising an Internal Application

1. Log-in to Research Funding (https://researchfunding.ucdavis.edu).
2. Go to the My Applications tab.
3. Select the project title under Active Applications to open the application.
4. Select "Retract Pre-proposal."
    a. This will return you to the My Applications tab.
5. Open the application to make edits.
6. Select "Edit Information."
7. Make necessary edits by going to the appropriate application screen. You may change anything other than the project title.
8. Select "Complete Draft" after all edits are made.
9. Select "Submit Pre-proposal" or "Submit Proposal" depending on the program type when complete.

# Checking Internal Application Status and
Accessing Review Feedback

1. Log-in to Research Funding (https://researchfunding.ucdavis.edu).
2. Go to the My Applications tab.
3. Application status is displayed to the right of the internal deadline for each application.
    a. Draft: Not submitted for review.
    b. Pending Review: Submitted and review will begin after the internal deadline.
    c. In Review: Reviews are in progress.
    d. Pending Selection: Reviews have been completed but the final decision is pending.
    e. Selected: The application has been selected for nomination or funding. Review feedback is available.
    f. Not Selected: The application was not selected for nomination or funding. Review feedback is available.
4. Select a project title under Previous Applications to view feedback.
5. Go to the Review Summary screen.
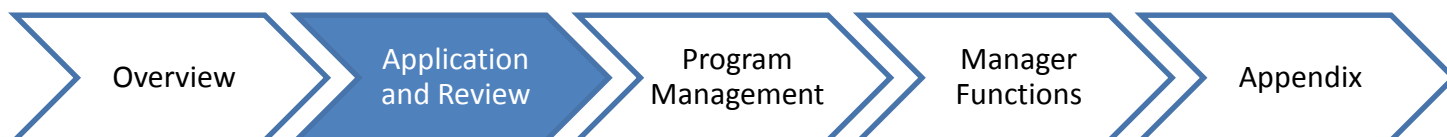
Reviewing Internal Applications

The internal review process for limited submission, coordinated submission and select UC Davis administered programs is conducted online.

1. Log-in to Research Funding (https://researchfunding.ucdavis.edu).
2. Go to the Committee Review tab.
3. Select the announcement name (program title) to view program details and internal applications.
4. Read the announcement information (to the left), any materials sent to you by the Limited Submission Program Coordinator or UC Davis administered program manager and the sponsor's solicitation before you conduct the review.
   a. Note that you may download all applications assigned to you as one PDF by selecting "Download Applications."
5. Select an application to view the submission and conduct your review. You can save your review for completion later.
   a. Closely read the application.
   b. You may download the application as one PDF by selecting "Click to Download" under the Documents section.
6. Go to the Assign Sub-reviewers screen if applicable.
   b. Start typing the reviewer's last name until his or her name appears.
   c. Select the appropriate name from the list.
   d. Contact limsubmissions@ucdavis.edu if a faculty member needs to be added to the list.
   e. The subreviewers' review scores and feedback will display on the Project Review screen.
   f. Repeat to add another reviewer to the application.
   g. Repeat from step 5 to add subreviewers to other applications.
7. Go to the Project Review screen to enter your reviews.
   a. Enter numerical scores and review feedback for each criterion.
   b. Select "Save Changes" to complete later or "Submit."
   c. Repeat from for each application.
8. After all reviews are complete, return to the main review screen (step 4) and select "Rank Applications."
   a. Rankings are not distributed to the principal investigators but aid the selection process.
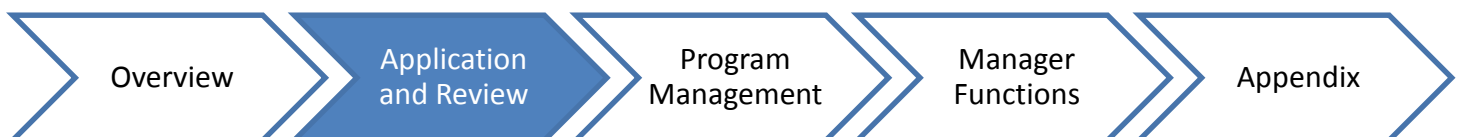
Research Funding System User Guide:
Program Management and Manager Functions

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Program Management

This module describes how to create programs and announcements for funding opportunities of special interest and UC Davis administered funding, limited submission and coordinated submission programs.

Management View

Program managers and those with the approver role only have slightly different Management views. However, approvers may access all announcements and programs from the grey toolbar.

Program Manager View

Executive View

Creating a Program

To Begin:

1. Log-in to Research Funding (https://researchfunding.ucdavis.edu).
2. Go to the Management tab.

Methods:

1. There are two ways to create a program:
    a. To create program from the Quick Action menu:
        i. Enter the sponsor name in the New Program text box.
        Note: Only use this method if you know the program is not in the system.
    b. To create a program from the program list:
        i. Select the Program tab.
        ii. Select the "+" sign.

2. After creating the program, fill required boxes under Program Details.
    a. Choose the appropriate program type from related modules:
        i. UC Davis administered program
        ii. Coordinated submission
        iii. Funding opportunity of special interest
        iv. Limited submission
    b. Enter contact information for the program.
    c. Enter program description and purpose in Funding Areas.
    a. Enter principal investigator eligibility details.
    e. *UC Davis administered programs only:* Select the relevant Program Subject Areas if applicable.
        Subject Areas are allow you to require applicants to select a subject area to which they are applying.
    f. Select Review Criteria to be used in program announcement.

3. Select "Save Changes."
4. Email limsubmissions@ucdavis.edu with the relevant Programs Tags.

Creating an Announcement

To Begin:

1. Log-in to Research Funding (https://researchfunding.ucdavis.edu).
2. Go to the Management tab.

There are three ways to create an announcement:
   Note: For the following methods, check that the announcement is not already in the system.

1. To create an announcement from the Quick Action menu,
    a. Enter part of the program title in the New Announcement text box and select the appropriate program.
2. To create an announcement from the announcement list,
    a. Select the Announcement tab (grey toolbar.)
    b. Ensure there is not an existing announcement.
    c. Select the "+"to add an announcement.
3. To create an announcement from the program,
    a. Select "Create Announcement."

   Note: Entering announcement information is the same regardless of the method, but the options vary based on the program type.

Funding Opportunity for Special Interest Programs
Announcement Information

1. Log-in to Research Funding (https://researchfunding.ucdavis.edu).
2. Go to the Management tab.
3. Enter information only in the Announcement Deadlines section.

   Note: Skip "Announcement Details" and "Document(s) to Upload" sections.

4. Select "Save Changes."
5. Select "Publish Announcement."

UC Davis Administered Funding Programs

Overview

The Research Funding system will coordinate the application, review, and selection process for UC Davis administered programs. Program managers may create announcements using a flexible structure that will allow for varying application and review processes.

The Research Funding system will:

- Advertise announcements to the relevant Office of Research Funding listserv(s) in the Weekly Research Funding Update for the two weeks following publication in the Research Funding system.

- Track expressions of interest to an announcement.

- Accept applications and other required materials designated by the program manager.

- Consolidate application materials into one PDF.

- Coordinate the online review process if desired.
    - Allow creation of multiple panels with the same or different review criteria.
    - Generate a Review Matrix that includes review scores submitted by each reviewer.
    - Provide review feedback to applicants at the level indicated by the program manager.

    Note: Program managers may opt to use the system to only accept applications and make selections.

- Notify investigators when applications are received and when final selection/nomination decisions are made.

    Note: The selection decision emails are sent to the program manager to be revised and then sent from the program manager's email account.

The Research Funding system will **NOT***:*

- Advertise beyond the Office of Research Funding listservs.

- Allow a reviewer to provide more than one review for a specific application.

- Allow external users unless they have been given a Temporary Affiliate Account: https://computingaccounts.ucdavis.edu/cgi-bin/taf/index.cgi.

- Determine eligibility of principal investigators.

- Permit multiple applications to an announcement from one principal investigator unless indicated by the program manager.

Roles and Responsibilities

The Research Funding system includes the following roles:

- **Manager**: The Limited Submission Program coordinator has access to all program announcements including applications and review feedback. The Limited Submission Program coordinator will provide guidance to program managers as they establish programs and coordinate the application, review and selection process.

  Note: The Limited Submission Program coordinator will not coordinate the application, review or selection process for individual UC Davis administered funding programs.

- **Program Manager**: will only have access to specific programs and the associated materials. The program manager will input all necessary information, coordinate the application, review and selection process and answer inquiries from interested principal investigators regarding the program.

  Note: Assigned by the Limited Submission Program coordinator.

- **Approver**: will provide official/final approval of the award/selectee decisions. Approvers are assigned for each program. The program manager may also serve as the approver.

- **Principal Investigator**: will be able to express interest in and apply to announcements and see review feedback.

- **Proxy (Principal Investigator)**: will be able to apply to announcements on behalf of a principal investigator and view the associated review feedback. Principal investigators may designate multiple proxies. Proxies may be added and removed from the "My Applications" tab at any time.

Process

Creating a Request for Proposals and/or Webpages

Prepare a document in Word (or other program of your choice) before beginning this process. It helps to already have a request for proposals (RFP) prepared, even if in draft form, before entering this information into the system.

Note: RFPs should include all information necessary for applicants to understand the purpose of the program, such as: the application process, review process and criteria, important deadlines and contact information for questions regarding the program.

Accessing Research Funding system

To access the Research Funding system: Email limsubmissions@ucdavis.edu and indicate whether you would like to coordinate a program through the system, or if you want another program manager added to a specific program.

Advertising an Announcement

Announcements will be included in the next two relevant Weekly Research Funding Updates. All announcements are sent to the Office of Research-maintained general funding listserv.

Announcements tagged "Humanities" will also be distributed to the humanities listserv and those tagged "Social-Sciences" to the social sciences listserv. Advertising through other mechanisms is also encouraged.

The Weekly Research Funding Update is sent to the following three Office of Research maintained listservs.

- General (funding@ucdavis.edu)
- Humanities (fundinghum@ucdavis.edu)
- Social Sciences (fundingss@ucdavis.edu)

Because these listservs are opt-in, they do not reach all UC Davis faculty. It is important to advertise through other channels to ensure broad dissemination of program announcements.

Other Avenues/Methods

- Department Chairs: https://academicaffairs.ucdavis.edu/resources/deans-chairs/deans_chairs_list.html
- Department Management Service Officers (MSOs)
- Junior faculty funding listserv: Email limsubmissions@ucdavis.edu to request distribution.
- Office of Research research unit directors: Email ceparks@ucdavis.edu to request distribution.
- Office of Research research unit managers: Email ceparks@ucdavis.edu to request distribution.
- Pivot: http://pivot.cos.com/submit_opp
- Research Coordinating Council: Email wkcheung@ucdavis.edu to request distribution.
- Social media outlets including:
  - Funding Opportunities Program Twitter account: Email limsubmissions@ucdavis.edu to request distribution.
- Websites including:
  - College and school level
  - Department level
  - UC Davis Funding: Email limsubmissions@ucdavis.edu to request inclusion.

Creating a UC Davis Administered Funding Program

The program should consist of information that will remain relatively the same with each competition. However, this may be changed at any time. Announcements are created from the program and include information related to the particular competition.

Note: See instructions above for **creating a program**. *Choose University of California, Davis as the sponsor or select other appropriate sponsor.*

Note: Email limsubmissions@ucdavis.edu *to add a sponsor.*

Coordinating a UC Davis Administered Funding Program Announcement

The Announcement will include the current competition details. An Announcement should be created for each competition.

To Begin:

1. Select the "Management" tab.

There are three ways to create an Announcement.

1. From the Quick Action menu.
2. From the announcement list.
3. From the program.

After you create an announcement:

1. Fill in the text boxes under Announcement Details.
    a. Select an approver from the dropdown box.
    b. Enter the level of review comments to display (all, detail comments only, summary comments only, none).
    c. Uncheck Show Budget Options if no budget is required.
2. Fill in the date boxes under Announcement Deadlines.
    Note: The deadline trigger is the date that will determine when the announcement changes to In Review.
3. Enter titles and descriptions, including page limits, of Document(s) to Upload.
4. Select "Save and Continue."
    Note: The above Announcement information cannot be changed after applications are submitted.
5. From the Review Panel Administration page you can:
    a. Select "View/Publish Announcements" or,
    b. Select "Edit Announcement" to ensure accuracy and completeness and make revisions.

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Coordinating the Review Process

The Research Funding system can coordinate the entire review process, or program managers may use the system to collect applications.

In order to monitor the functionality of online reviews, you must first establish a review structure.

Note: It is ideal to make as little changes to the review structure as possible once it has been established.

The review panels and review criteria should be established before the review process begins. You may add and remove reviewers from the panels. However, once an application has been assigned to a review panel, the criteria can no longer be changed.

To Begin:

1. Go to the Management tab.
2. Select the relevant announcement from the Announcement tab.

After opening the Announcement:

1. Go to the Application and Review Details tab.
2. Select "View/Publish Announcements."
3. Select "View Panel Definitions."
4. Select the "+" to create a review panel.

After creating a Review Panel:

1. Enter the panel name.

    Note: To save your progress, hit "tab" on your keyboard.

2. Add details for the review panel.

    a. Select the appropriate subject areas from the dropdown box.

3. Repeat steps for each panel you want to add.

    Note: Entries are automatically saved.

To add a reviewer:

1. Type his/her last name in the text box. Select the appropriate reviewer when his/her name appears. Once saved, the reviewer's name will show under the text box.

When creating a review panel:

1. Assign each criterion a weighted percentage (out of 100%).

    Note: This option will only be available if you did not select "weight all categories evenly" when creating the program. If you leave a criterion at 0%, it will not show on the panel's review submission page.

To assign applications to review panels:

1. Select the program announcement.
2. Go to the Application and Review Details screen.
3. Select the appropriate panel to review each application.
   a. To remove the panel, select "Remove" under the Add/Remove Panel dropdown menu.
   Note: The panel will appear under Review Panel Assignments when saved.

To evaluate review submissions and print reports:

1. Go to the Reports tab.
2. Select the report you wish to download.

To add a Review Summary to an application:

1. Open the application.
2. Go to the Review Summary screen.
3. Enter the feedback under Review Final Summary.
4. Select "Update Summary."

There are three different types of reports:

1. Project Summary & Abstract Report (PDF)
   a. This report includes the Project Summaries and/or Abstracts for each application, depending on whether they are required by the program manager.
2. Application Review Summary Report (PDF)
   a. This report includes a list of the submitted applications, review assignments, overall review scores and individual reviews and scores.
3. Administered Program Raw Data (Excel)
   a. This report includes the individual reviews and scores and can be used to arrange and formulate the data as needed for an individual program announcement.

Coordinating a Limited Submission Program
Creating a Limited Submission Program Announcement

To Begin:

1. Go to the Management tab.

From there, there are three ways to create an Announcement.

1. From the Quick Action menu.
2. From the announcement list.
3. From the program.

To create an Announcement:

1. Fill in the text boxes under Announcement Details.
    a. Select the approver that will make the final selection decision.
    b. Enter the level of review comment to display (all, detail comments only, summary comments only).
    c. Uncheck Show Budget Options if no budget is required.
2. Fill in the text boxes under Announcement Deadlines.
    Note: The deadline trigger is the date that should drive when the announcement routes to "Closed".
3. Select documents to upload.
    Note: Project description and biosketches automatically appear. However, you may delete them and/or add other materials. Project documents can be downloaded, completed, and re-uploaded by principal investigators as part of their applications under the Additional Document(s) to Upload section.
4. Enter Review Criteria.
    a. Select weights for each out of a maximum of 100 (in terms of %)
        Note: You may use the standard criteria or add new criteria.
5. Select "Save and Continue."

To publish your announcement:

1. Select "View/Publish Announcements."

From the "Review Panel Administration" page you can:

1. Select "Edit Announcement" to ensure accuracy and completeness and make revisions.
2. Select "Publish Announcement."

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Coordinating the Review Process

Reviewers may be assigned once applications have been submitted. However, it is advisable to establish the review committee in advance of the internal deadline based on the expressions of interest received and disciplines/topic areas funded by the program.

1. To check expressions of interest:
   a. Go to the Announcements tab.
   b. Open the relevant announcement.
   c. Scroll to the bottom for a list of those who have expressed interest.
2. To assign reviewers to applications.
   a. From the announcement, go to the Applications screen.
   b. To assign a reviewer to all applications, select his/her name from the text box.
   c. To assign a reviewer to an individual application:
      i. Select the "+"and a text box will appear.
      ii. Select his/her name from the text box.
   d. Add review chair after all reviewers have been entered.

To evaluate review submissions.

1. From the Announcements tab, go to the Applications screen.
2. Select "View Summary" under a project title to access the application.
3. Select "Review Summary" to view the review submissions.

To view the Review Matrix report:

1. Go to the Review Overview screen from the announcement.
2. Select "View Review Matrix," or,
3. Select "Download Excel Version."

To add a Review Summary to an application:

1. Open the application.
2. Go to the Review Summary screen.
3. Enter the feedback under Review Final Summary.
4. Select "Update Summary."

Coordinating a Coordinated Submission Program
Creating a Coordinated Submission Program Announcement

To Begin:

1. Go to the Management tab.

There are three ways to create an Announcement:

1. From the Quick Action menu.
2. From the announcement list.
3. From the program.

After you create an Announcement:

1. Fill in the text boxes under Announcement Details.
    a. Select an approver from the dropdown box.
2. Fill in the text boxes under Announcement Deadlines.
    a. The deadline trigger is the date that will determine when the announcement changes to "In Review."

    Note: Skip the Documents section.
3. Select "Save Changes."
    a. Once you review for accuracy and completeness, select "Publish."

Coordinating the Selection Process

Both the approver and the program manager have access to the selection process. Program managers may notify the approver that an announcement is ready for selection.

To notify the approver:

1. Go to the Announcements under Pending Selection.
2. Go to the Applications screen.
3. Select "Notify Approver."

To add a Review Summary to an application:

1. Open the application.
2. Go to the Review Summary screen.
3. Enter the feedback under Review Final Summary.
4. Select "Update Summary."

There are two ways to make selections depending on your role.

1. If you are an approver:
    a. Go the Management tab.
    b. Open the announcement under Pending Selection.
    c. Select applications.
        i. Change the selection status to "Selected" or "Not Selected" for each application.
        ii. The announcement will route to Pending Finalization after the approver has made the selections.
2. If you are a manage or program manager:
    a. Go the Management tab.
    b. Open the announcement under Pending Selection.
    c. Go the Applications or Applications and Review Details screen depending on the program type.
    d. Select View Summary under a project title.
    e. Go the Review Summary screen.
    f. Select "Not Selected" or "Selected" as appropriate.

    Note: For Limited Submissions, all other applications will route to Not Selected once the Selection Limit has been reached.

Program managers must finalize the announcement by using the following steps:

1. Go the Management tab.
2. Open the relevant announcement under Pending Finalization.
3. Go to the Applications or Applications or Applications and Review Details screen depending on the program type.
4. Select "Finalize Announcement."

    Note: Draft email notifications will be sent to the program manager, who should edit the emails as appropriate and send.

    Note: This serves as a check and balance so that the program manager can retract the decision if a mistake was made. It also allows them to make any final adjustments/clean-up the review submissions.

    Note: Once an announcement is finalized, principal investigators will have access to reviews and the feedback (as indicated by the program manager).

Manager Functions

Users with the manager role have access to additional functions. Managers may assign user roles, assign program managers, create sponsors, perform program maintenance and change announcement status.

Assign User Roles

To begin:

1. Go to the Management tab.
2. Go the Users tab.
3. Type the user's last name in the text box and select the appropriate name.
4. Select the role(s) you to assign.
   Note: Changes save automatically.

Assign Program Managers

To assign additional program managers to specific programs:

1. Select "Edit Program" for the desired program.
2. Select "Assign Program Managers" and a text box will appear.
3. Type the user's last name and select the name.
4. Select "Save Changes" when complete.

Creating a Sponsor

To Begin:

1. Go to the Management tab.

To create a sponsor from the Quick Action menu:

1. Select "New Sponsor."
   Note: Only use this method if you know the sponsor is not in the system

To create a sponsor from the "Sponsor" list:

1. Check the listing to make sure the sponsor does not exist.
2. Select the "+".
   Note: Entering sponsor information is the same regardless of the method.
3. Select "Save Changes" when complete.
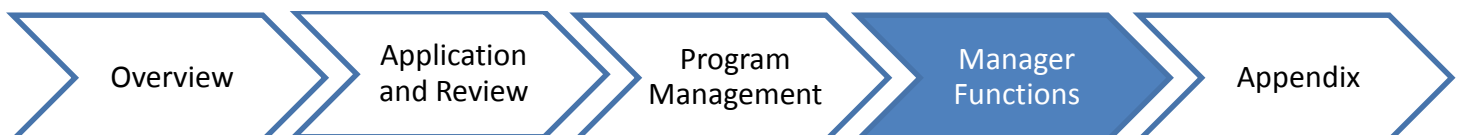
UC Davis Administered Program Maintenance

This feature allows a program manager to add or delete subject areas, review categories and review criteria that program managers may use.

To Begin:

1. Go the Management tab.
2. Select the function under Program Maintenance.
   Note: Subject areas, review categories and review criteria that are in use cannot be removed.

Changing Announcement Status

Managers can change the status of an announcement. Changing an announcement back to Open from In Review may cause any submitted reviews to be lost.

1. From the desired announcement, select the appropriate status from the dropdown box.
   Note: This should be used sparingly.

Appendix

Home Page Screenshot

Research Funding (RF) Tags

Topic Area	RF Tag
Agricultural & Environmental Sciences	Agricultural Environmental Animal Science Nutrition
Biological Sciences	Biological Neurology
Engineering	Engineering
Humanities, Arts and Cultural Sciences	Humanities Arts Performing Arts Literature Music
Mathematical & Physical Sciences	Atmospheric Mathematics Physics Physical Sciences Earth Sciences Space Sciences Material Science
Social Sciences	Social-Sciences Law Economics Policy
Medicine	Alternative Medicine Autism (ASD) Behavioral Medicine Cancer Pharmacology Neuroscience Medical-Medicine Ophthalmology Clinical Trials HIV-AIDS
Veterinary Medicine	Veterinary Medicine
Other	Career Development Construction-Renovation Training Law International Equipment Education K12 Developing Countries

Topic Area	RF Tag
	Business
	Core Facilities
	Outreach
Interdisciplinary	Interdisciplinary
	Climate Change
	Technology
	Genomic-Genetic
	Energy
	Biomedical
	Health Care
	Forensic science
	Commercialization
	Proof-of-Concept
	Precision Medicine
	Marine Sciences
	Transportation
	Safety
	History
	Nuclear
Sponsor Type	Private Foundation
	University of California
	Corporate
Investigator Career Level	Senior Investigators
	Junior Investigators
	Mid-Career
	Post-docs