

# 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.

The screenshot shows the 'General Proposal Information' screen in the EPD system. The 'Anticipated Award Type' dropdown menu is open, and 'Fellowship' is selected. The screen includes fields for Proposal Type, Start Date, End Date, Agency/Sponsor, Prime Sponsor, Proposal Deadline Date, NSF Science Code, Agency Program Code, Agency Div Code, and Previous Grants.gov Tracking ID. A 'Save' button is visible at the bottom.

**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)**.

The screenshot shows the 'Investigator/Key Study Personnel Details' screen. The 'Agency/Sponsor' field is highlighted with a red box. A red banner indicates 'PHS Conflict of Interest disclosure required'. The table below lists the investigators:

Name	Department	LU	MPI	Role	T	A	S	C	Remove	Certify	Details
ANDREWS - TEST, KAREN	PHYSICS	<input checked="" type="checkbox"/>		Principal Investigator	0.0	0.0	0.0	0.0	Remove	<input checked="" type="checkbox"/>	Details
JENKINS - TEST, ELIZABETH	PHYSICS			Co-Investigator	0.0	0.0	0.0	0.0	Remove	<input type="checkbox"/>	Details

**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.

**State of California - 700U disclosure not required**

Name	Department	LU	MPI	Role	T	A	S	C	Remove	Certify	Details
ANDREWS - TEST, KAREN	PHYSICS	<input checked="" type="checkbox"/>		Principal Investigator	0.0	0.0	0.0	0.0	Remove	<input checked="" type="checkbox"/>	Details
JENKINS - TEST, ELIZABETH	PHYSICS			Mentor or Sponsor	0.0				Remove		Details

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).

**Add COI special review line for PI (fellow) & Co-I or Key Study Person (faculty)**

Special Review	Approval	Protocol No	Application Date	Approval Date	Comments	Remove
PI Exception	Pending				View	Remove
Conflict of Interest	Pending	Last, First (fellow)			View	Remove
Conflict of Interest	Pending	Last, First - faculty			View	Remove

**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**

**PI Exception Questionnaire**

1) The PI (or Co-PI) listed on this proposal does not have a title code that makes them automatically eligible to submit a proposal. Has the PI, or Co-PI, submitted a completed PI Exception request form? Click MORE for additional information. **More**

Yes  No

**Save & Proceed** **Print**

<ul style="list-style-type: none"> <li>Proposal Summary</li> <li>✓ General Info</li> <li>✓ Organization</li> <li>✓ Investigators/Key Persons</li> <li style="border: 2px solid red;">✓ Special Review &gt;&gt;</li> <li>Abstract</li> <li>SIO Science Code</li> <li>Others</li> <li>✓ Proposal Roles</li> <li><b>Questionnaire</b></li> <li>PI Exception Questionnaire</li> <li>Administrative</li> <li>Space</li> <li>Research</li> <li>Budget</li> </ul>	<p>Investigator: ANDREWS - TEST, KAREN  Agency/Sponsor: 0166 : CALIFORNIA PACIFIC TOURS  Title: Fellowship</p> <p>Proposal # : 00012417 (In Progress)  Proposal Period: 07/01/2018 - 06/30/2020</p> <p>Special Reviews [Proposal No. - 00012417]  <a href="#">Add Special Review</a></p> <p>Special review status from eCOI</p> <p>Special Review Status: Not Found  Launch URL: <a href="http://ecoi-qa.ucsd.edu/ecoi-qa-store/">http://ecoi-qa.ucsd.edu/ecoi-qa-store/</a></p> <p>List of Special Review</p> <table border="1"> <thead> <tr> <th>Special Review</th> <th>Approval</th> <th>Protocol No</th> <th>Application Date</th> <th>Approval Date</th> <th>Comments</th> </tr> </thead> <tbody> <tr> <td>PI Exception</td> <td>Pending</td> <td></td> <td></td> <td></td> <td>View Remove</td> </tr> </tbody> </table>	Special Review	Approval	Protocol No	Application Date	Approval Date	Comments	PI Exception	Pending				View Remove
Special Review	Approval	Protocol No	Application Date	Approval Date	Comments								
PI Exception	Pending				View Remove								

**Fellowship Questionnaire:** Answer 'yes' or 'no' according to the guidelines below.

**Fellowship**

[Previous](#)   [Modify](#)   [Start Over](#)

1) Is this fellowship proposal for a non-professional (single or joint) degree Graduate Student? Please click MORE for additional information. [More](#)

Yes    No

- A joint degree is not a dual degree; a dual degree will result in two degrees and a joint degree is a collaboration between institutions that results in a single degree at each institution
  - a. An example of a non-professional single degree is a MA, Ph.D., etc.
  - b. An example of a non-professional joint degree is a Ph.D and MPH

**Routing for Approvals:**

Institutionally, department approvals are not required for Fellowships. It is understood that the department supports the Fellow with all the necessary resources.

**OCGA & 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.

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