Fellowship Assurance Form

End User Guide

OnBase Web Client
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**Logging into OnBase Web Client**

1. Enter this URL into your browser of choice:  
   https://obweb.ucsd.edu/AppNet/Login.aspx
2. Using your Active Directory (AD) credentials to log into OnBase
3. AD Username defaults to ALL CAPS (make sure CAPS lock is off)  
   AD Password remains case sensitive

NOTE: Refer to UC San Diego Form Assistance/Support contact page (page 19) for any access issues.

**Landing Page after successful Login**

1. Username dropdown (green) will be the first dropdown
2. Document will be the default value in the second dropdown
3. Document Retrieval will be the default value in the third dropdown
4. List of available Document Types for retrieval will be listed
5. Date range for retrieval is available (not required)

**Web Client Icons**

1. The binocular icon will retrieve documents based on the keyword(s) a user enters
2. The clock with green arrow icon will display query history, listing all previous queries for the logged in user
3. The key with green arrow icon will clear any keywords previously entered

**Logging out of OnBase Web Client**

1. Click on dropdown arrow next to username
2. Click on Logout
3. OnBase Web Client currently has a time out setting for 2 hours. After 2 hours of no activity, user will be automatically logged out of Web Client
Creating/Submitting a new Fellowship Assurance Form

1. In left margin, click on 2\textsuperscript{nd} dropdown menu that has ‘Document Retrieval’ as the default option
2. Select ‘New Form’ option
3. Click on New Form to launch new form.

Selecting new Fellowship Assurance Form

1. Click on Fellowship Assurance Form to launch new form
2. Fellowship Assurance Form will display on right hand side

Fellowship Assurance Form
Optional Fields

1. *ERA Commons Account, ePD number, ASSIST number, and FOA number are optional fields.*
2. Enter these fields if available.

**ePD Lookup**

1. Enter *ePD number in ePD # field.*
2. Click tab on your keyboard.
3. The following fields will auto-fill once tab button is clicked:
   - Applicant Full Name
   - Applicant Home Department Code
   - UC San Diego Fund Manager Name
   - UC San Diego Fund Manager Email
   - Project Title
   - Proposal Deadline
   - ePD status
   - Type of proposal
4. To reset entry, click ‘Reset ePD entry’ and this will clear off the above fields.
Main Section: Applicant

1. Enter applicant last name in ‘Applicant Full Name’ textbox.
2. Click on ‘Lookup’ button and it will autofill the following fields:
   - ‘Applicant Email’
   - ‘Applicant Home Department Code’
   - ‘Applicant Title’
   - ‘Applicant Phone#’.
3. Ensure the validity of the email address and overwrite when needed.
4. Check ‘check here if the applicant is not a UC San Diego employee’ box and manually enter applicant information.

Main Section: UC San Diego Fund Manager

1. Enter fund manager last name in ‘UC San Diego Fund Manager Full Name’
2. Click on ‘Lookup’ button and it will autofill ‘UC San Diego Fund Manager email’.
3. Required fields are ‘UC San Diego Fund Manager Full Name’ and ‘UC San Diego Fund Manager email’.
Main Section: UC San Diego Sponsor

1. Enter UC San Diego Sponsor’s last name in ‘Sponsor Full Name’ textbox.

2. Click on ‘Lookup’ button and it will autofill the following fields:
   - ‘Sponsor Email’
   - ‘Sponsor Home Department Code’
   - ‘Sponsor Title’
   - ‘Sponsor Phone#’.

3. Required fields are ‘Sponsor Full Name’ and ‘Sponsor Email’.

Main Section: Co-Sponsors (Co-Sponsor 1)

1. To add a Co-Sponsor, check the ‘Co-Sponsor’ checkbox and this will bring up Co-Sponsor section.

Main Section: Co-Sponsors (Co-Sponsor 2)

1. Up to 2 co-sponsors can be added in the form. If 2 co-sponsors are needed, after clicking Co-Sponsor checkbox, click ‘Add Another Co-Sponsor’ checkbox.

NOTE: If there are more than 2 co-sponsors, please contact Anastasia Hendry (ahendry@ucsd.edu).
Main Section: UC San Diego Department Chair

1. Enter UC San Diego Department Chair’s last name in ‘UC San Diego Department Chair Full Name’ textbox.

2. Click on ‘Lookup’ button and it will autofill the following fields:
   - ‘UC San Diego Department Chair Email’.
   - ‘UC San Diego Department Chair Home Department Code’.
   - ‘UC San Diego Department Chair Title’.
   - ‘UC San Diego Department Chair Phone#’.

3. Required fields are ‘UC San Diego Department Chair Full Name’ and ‘UC San Diego Department Chair Email’.

Main Section: Project Title and Proposal Deadline Date

1. Enter project title in ‘Project Title’ textbox.

2. Enter proposal deadline date in ‘Proposal Deadline Date’ textbox.
Initial Notification to UC San Diego Fund Manager and HS SPPO Analyst.

1. After successful submission of the Fellowship Assurance form, the UC San Diego fund manager and HS SPPO Analyst (Anastasia Hendry) will receive an email notification.

2. Email notification example below:

   ![Email notification example](image-url)

   To whom it may concern,


   ePD #:

   UC San Diego Sponsor Name: PEREZ, ALAN

   Co-Sponsor Names:

   COOK, RACHEL ANN

   Proposal Deadline Date:

   NOTE: If you are viewing the form, please do not forget to close it (or close the browser).

   Thank you.

   Health Sciences Research Service Core (RSC) Systems, Strategies, and Analytics Team.
Notification to Applicant and task.

1. Applicant will receive an email notification prompting them to review and complete the form.

2. Applicant is required to complete the following actions:
   * Review the form.
   * Electronically sign the form in Applicant signature section in the main page.
   * Click SUBMIT.
   * Close the browser page or tab that is displaying the form.

3. Submitting the form will route to the UC San Diego Sponsor.
Notification to UC San Diego Sponsor and task.

1. UC San Diego Sponsor will receive an email notification prompting them to review and complete the form.

2. UC San Diego Sponsor is required to complete the following actions:
   * Review the form.
   * Electronically sign the form in UC San Diego Sponsor signature section in the signature page.
   * Click **SUBMIT**.
   * Close the browser page or tab that is displaying the form.

3. Submitting the form will route to the Co-Sponsor(s) if applicable, or otherwise to UC San Diego Department Chair.
Notification to Co-Sponsor(s) * and task.

1. When selected, Co-Sponsor(s) will receive an email notification prompting them to review and complete the form.

2. Assigned Co-Sponsor(s) is/are required to complete the following actions:
   * Review the form.
   * Electronically sign the form in Co-Sponsor signature section in the signature page.
   * Click SUBMIT.
   * Close the browser page or tab that is displaying the form.

3. Submitting the form will route to the UC San Diego department chair.
   * Only when Co-Sponsor(s) is selected.
Notification to UC San Diego Department Chair and task.

1. UC San Diego Department Chair will receive an email notification prompting them to review and complete the form.

2. UC San Diego Department Chair is required to complete the following actions:
   * Review the form.
   * Electronically sign the form in UC San Diego Department Chair signature section in the signature page.
   * Click **SUBMIT**.
   * Close the browser page or tab that is displaying the form.

3. Once the form is submitted, an email notification will be sent to the appropriate fund manager and HS SPPO Analyst.
Retrieve a Completed Fellowship Assurance Form

1. In left margin, click on 2nd dropdown menu that has ‘Document Retrieval’ as the default option.
3. Select ‘HS SPPO Review Process’ in Document Type Groups then select ‘HS SPPO Fellowship Assurance Form’.
4. Enter keywords to retrieve the “Fellowship Assurance Form” by (recommended keywords include date range, Fund Manager, or Fellowship - Applicant Full Name).
**Custom Queries**

1. Select the Custom Queries option from the third dropdown menu
2. Select specific Custom Query you want to use
3. Optional: Enter From Date and To Date
4. Enter keyword to query documents by (Employee Name, UCSD Project Number, Grant Number)

   A. If using ‘Fellowship - Applicant Full Name’, ‘Fellowship - Fund Manager Full Name’, or ‘Fellowship - Sponsor Full Name’ keyword to retrieve your document by, please enter asterisk before and after value (i.e. *SMITH*)

5. Press enter twice on your keyboard or Click on Binoculars icon to retrieve documents
6. Custom Query results will display on right hand side of browser window
7. PDF documents will display in lower right hand side of the browser window

**Fellowship Assurance Form Custom Query**
Logging out of OnBase Web Client

1. In left side margin, click on first dropdown with your username
2. Click on Log Out
Fellowship Assurance Form Assignee Roles and Responsibilities

UC San Diego Fund Managers
1. Responsible for initiating the Fellowship Assurance form.
2. Assign Applicant, UC San Diego Sponsor, Co-Sponsor(s), UC San Diego Department Chair
3. Ensure all assigned contacts review and sign the form.
4. Provide a triage to void the form if needed.
5. Receives email confirmation in the initial and final process of the form.

Fellowship Assurance Applicant
1. Review and ensure accuracy of the form.
2. Sign the form.
3. Report any form data issues and/or questions to HS SPPO Analyst.

UC San Diego Sponsor, Co-Sponsors (Co-Sponsor 1 and 2), and UC San Diego Department Chair
1. Review and sign their designated section in Fellowship Assurance form.
2. Report any form data issues and/or questions to HS SPPO Analyst.
FAQs

What if I cannot log into OnBase Web Client?
Please see UC San Diego Form Assistance/Support contact page.

What if a signatory confirms data is incorrect?
Preparer will need to submit a new Fellowship Assurance form with correct data. Contact Anastasia Hendry (ahendry@ucsd.edu) to void the form.

Who do I contact for a status update on my Fellowship Assurance form?
Please email Ari Widjaja (arwidjaja@ucsd.edu) with the following information: form ID number or the name of the applicant on the form.

Who do I contact if it appears a signatory did not sign correctly or close their browser after signing and submitting form?
Please see UC San Diego Form Assistance/Support or contact Anastasia Hendry (ahendry@ucsd.edu)

How to void a Fellowship Assurance form?
Please contact Anastasia Hendry (ahendry@ucsd.edu) or RSC staff (refer to UC San Diego Form Assistance/Support contact page).

Where do I send form feedback and suggestions?
Please see UC San Diego Form Assistance/Support contact page.
UC San Diego Form Assistance/Support

If you need assistance or support with a form or the process, please contact the following:

Ari Widjaja, VCHS Research Service Core
arwidjaja@ucsd.edu

Alan Perez, VCHS Research Service Core
alp043@ucsd.edu

Isabella Bryant-Parkinson, VCHS Research Service Core
ibryantparkinson@ucsd.edu

Anastasia Hendry, HS SPPO Analyst - Fellowship Assurance form specialist
ahendry@ucsd.edu