

FOR MENTORS: Magellan Scholar Mentor Forms and USCeRA Submission Guide

NOTES:

- 1) **Please call me if you have ANY problems** – I am happy to help and can often fix things through the admin system: Julie Morris at 803-777-4649
- 2) The 5pm requirement on the deadline date is for submission of the completed application/proposal INTO USCeRA (*submitting requires clicking on the “Start approval process” button*). Electronic signatures from the chair and dean can occur later and they are notified automatically by the system of pending applications.
- 3) Students do NOT submit the proposal through USCeRA and do not register in the system.

There are **7 steps** described below to complete submission of the Magellan Scholar proposal:

- 1) **Complete required mentor form(s):** All proposals must have one primary collaboration form. If a student is being mentored, supervised, etc. by more than one mentor (including graduate students), each secondary/co-mentor must complete a secondary mentor form.
 - [Primary mentor form](#)
 - [Secondary mentor form](#)


NOTES:

- Both forms can also be found on the Magellan Scholar webpage, under “Applying” and #7 in the Application Process.
- Use ONLY the form(s) provided. *Other formats will not be accepted.*
- Forms are updated often, please check version dates, at top of forms, to ensure most recent version.
- Forms do not need physical signatures. Submission by mentor through USCeRA is signature equivalent.
- If you have any problems with the forms, please contact our@sc.edu or 803-777-4649 for assistance.

- 2) **Attach (or cut and paste) the completed primary/secondary mentor form(s) to the end of student’s proposal.**
NOTE: Student transcripts are not to be included. Minimum institutional GPA of 3.300 (no rounding) will be verified by the Office of Undergraduate Research.
 - Create ONE document (Word or PDF is acceptable; please do not scan) containing:
 - i. Student’s project description
 - ii. Budget form
 - iii. *If applicable*, memo from business manager regarding participant incentives
 - iv. Primary and, if applicable, secondary mentor collaboration form(s)
 - v. *If applicable*, memo from supporting partner or expert (see page 6 of guidebook)
 - NOTE:** for resubmissions, the first item will be the “Resubmission Response” sheet (see page 16 of guidebook)
 - Name the file document: Student last name_first initial [Example: Doe_J; for groups: Doe_Jones_Smith (alphabetically by last name)]
 - **Please do not upload scanned applications.** Proposals can be submitted in Word or PDF.
 - If you cannot combine the document parts, I’m happy to help. Please contact Julie Morris at jmorris@sc.edu or 803-777-4649.

- 3) **Login to USCeRA** (sam.research.sc.edu/uscera/) using your USC Network Username and password **and DUO** two-step verification/multifactor authentication

4) Complete the USCeRA Proposal / Award Processing Form (PAP)

- Along the top of the main USCeRA page OR left side (depending on the width of your page), in the garnet header area, select “Proposals” and “Create New Proposal.”
- Page 1: Complete the fields as follows:
 - a. Title: *enter* **Magellan-Student Last Name-Project Title**
EXAMPLE Magellan-Doe-Measuring the fun during undergraduate research experiences
 - b. Primary Awardee Department: *will autofill based on your registration*
 - c. Type: *New or Revision* (if this is a resubmission)
 - d. Grants.gov Workspace ID: *leave blank*
 - e. Start date: For the October deadline – *1/1/YEAR*, for February deadline – *5/1/YEAR*
 - f. End date: *please use either the enddate indicated in your student’s timeline or the program maximum* (Maximum for the October deadline – *12/31/YEAR*, Maximum for February deadline – *5/31/Next YEAR*)
 - g. Agency Deadline Type: *Receipt*
 - h. Agency Deadline Date: *Found on Magellan Scholar webpage*
 - i. You should now see a green/color filled continue button with a check mark,  please click this. If it is NOT green/color filled with a checkmark, something is missing. Please review the fields as described above or contact me at 803-777-4649.
- Page 2 or second tab labeled “Source/Sponsor” at top:

Please note the following is **CRITICAL**. **Incorrect entries will result in improper routing of the proposal – it WILL get lost!**

- a. Is this an internal request? **Select** YES
 - b. Internal Request Office: **Select** Vice President for Research
 - c. Internal Request Type: **SELECT** Magellan Scholar Program
 - **What if “Magellan Scholar” is not an option?** Contact me immediately as you will be unable to submit: jmorris@sc.edu or 803-777-4649.
 - d. The “Sponsor” fields will fill automatically or may be hidden.
 - e. You should now see the green/color filled continue button with a check mark, please click this. If it is NOT green/color filled with a checkmark, something is missing. Please review the fields as described above or contact me at 803-777-4649.
- Page 3 or third tab labeled “Personnel” at top:
 - a. At top will be a table with PI name – leave as is
 - b. Add Personnel: *ONLY if there are additional USC Faculty/staff as secondary mentors*. Graduate student mentors cannot be added in USCeRA. Please be sure all mentors are listed on the student’s proposal and complete a secondary mentor form.
 - To add: click on button “+ Add Personnel”
 - In pop up box: search by typing in last name (can also enter in First or use the select department box)
 - Select name **If the name of the additional personnel does not appear, continue the submission without this and email the name, department, and email to our@sc.edu*
 - Indicate role on project
 - Enter effort (can be all 0)
 - Salary \$0
 - Click on Continue

- c. Add Student: Click on button “+ Add Student”
PLEASE NOTE that sometimes this section does not work properly or the department won't save – no worries. It is ok to submit without this and we can fix it after submission. Please call 803-777-4649 or email our@sc.edu with questions or concerns.
- In pop up box, enter
 - first name, last name, email address
 - For department, choose the department of the student's major. **See the notes below for special majors and non-Columbia campuses.** You can type in partial words to begin searching or scroll the list. It is not in alphabetical order. *If the student's department is not listed, please select your own department.*
 - Click on continue

NOTES on campuses and majors:

- For **non-Columbia** campuses: choose your specific campus (e.g. UofSC Aiken).
- For **Columbia** campus: choose the department of the student's major.
 - For **Baccalaureus Artium et Scientiae or BARSC**, choose “Honors College”
 - For ALL **Business students (Columbia)**, choose “Moore Sch – Div. of Research”
 - For **Economics**, choose “Moore Sch – Div. of Research”
 - For **Environmental Science or Studies**, choose “School of Earth, Ocean & Env”
 - For **Geology or Geophysics**, choose “School of Earth, Ocean & Env”
 - For **International Studies** majors, choose “Political Science”
 - For **Marine Science**, choose “School of Earth, Ocean & Env”
 - For **Pharmacy and Pre-Pharmacy**, choose “Pharm-Clin Pharm & Outcomes Sciences”
- ❖ If the major is not listed above and is not in USCeRA (such as **Biomedical Engineering**) please select your primary department of record.

- d. You should now see the green/color filled continue button with a check mark, please click this. If it is NOT green/color filled with a checkmark, something is missing. Please review the fields as described above or contact me at 803-777-4649.

➤ Page 4 or fourth tab labeled “Costs” at top:

- a. Project costs
- Amount Requested for the First or Current Year: *This should be the total budget requested by the student(s) (max \$3000 per student)*
 - Project Years: 1
 - Total Amount Requested for All Project Years: *total budget requested by the student(s) (max \$3000 per student)*
- b. The following options should be hidden or autofill. If not, please enter as follows:
- Indirect Costs: enter 0 (no indirect costs)
 - Indirect Cost Amount for the First Year: 0
 - Project Uses Non-Standard Rate: No
- c. You should now see the green/color filled continue button with a check mark, please click this. If it is NOT green/color filled with a checkmark, something is missing. Please review the fields as described above or contact me at 803-777-4649.

- Page 5 or fifth tab labeled “Questions” at top:
 - a. Questions: *Answer yes/no as appropriate – most should be no.* **EXCEPTIONS:** See below for Human subjects or vertebrate animal usage.

Vertebrate animals? If TRUE, select YES (approval is not required for submission)

After selecting YES (even if you do not yet have approval):

- 1) An “Approval #” field will appear
- 2) Type in “PENDING” or enter the appropriate number (and date for animals).

Human Subjects? Only select YES if the project requires IRB oversight.

➤ **Does the project require IRB:**

If the project involves **humans** (including but not limited to interviews, surveys or review of personal/private information), please review the [Student Research guide](#) provided by the Office of Research Compliance. Based on this guidance, most *student driven* projects will not require further review. **Faculty oversight and student training through the CITI Human Subjects modules are required.** Some projects may also require use of the Undergraduate Research Consent Form. *A template is available on the [Student Research page](#).* If this is a mentor developed/driven project, requirements may differ. If a student is “[engaged in the research](#)” on a mentor’s project requiring IRB oversight (new or approved protocol), the student must be added. Contact the [Office of Research Compliance](#) (803-777-7095) with questions.

➤ **IF the project requires IRB,** select YES (even if you do not yet have approval):

- 1) An “Approval #” field will appear
- 2) Type in “PENDING” or enter the IRB approval number.

b. Comments: (last box on form): *Blank*

c. You should now see the green/color filled continue button with a check mark, please click this. If it is NOT green/color filled with a checkmark, something is missing. Please review the fields as described above or contact me at 803-777-4649.

5) **Complete the Internal Commit Form**

NOTE: This form indicates a proposal is REQUESTING funds from UofSC (as an internal funding source), which includes the Magellan Scholar program. It does NOT indicate a need for cost-sharing from your department, college, or campus.

Once you have successfully saved the Proposal/Award Processing Form (PAP) form from step 4, you will be brought to a “Proposal Summary” page. Scroll down.

- a. Under the section entitled “My Forms” (left side of page), click on the title “Internal Commit”
- b. In the blank square beside **Year 1**, under the “Requested” column, enter the total amount requested for the Magellan Scholar award (max of \$3000 per student).
- c. ALL other squares and text boxes should be blank.
- d. Scroll to the bottom of the page and click the <UPDATE> or <SAVE> button.

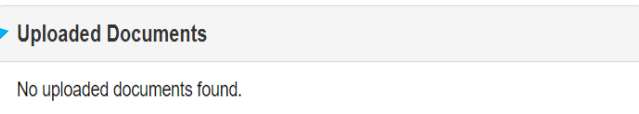
NOTE: Under the My Forms section, if you see “Administrative Information,” please leave as is – do not change or edit. This may not be present, but is so, may show as complete or incomplete. A status of incomplete will NOT affect the submission.

6) Upload the Magellan Scholar proposal

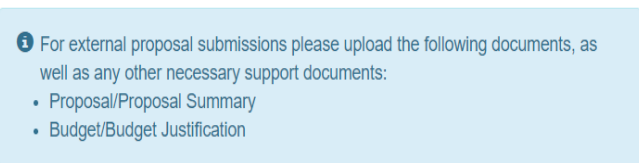
NOTES:

- Please submit as ONE word or PDF document. Do not submit scanned proposals. Do not submit separate files. Contact Julie Morris at jmorris@sc.edu or 803-777-4649 if you have any problems with this. I'm happy to help.
- File document should be named "Student Last Name_First initial" OR *for groups*, alphabetically by student last name "Student 1 last name_Student 2 last name."
- Do not upload the budget as a separate file.
- If the upload takes longer than a minute to process – the system is stuck, try again or call me at 803-777-4649. We may have you email the proposal to jmorris@sc.edu or OUR@sc.edu and upload it for you.

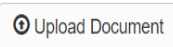
- On the lower right-hand side of the "Proposal Summary" page is the "Uploaded Documents" space.



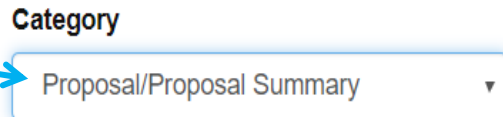
- All components (including proposal and budget) should be uploaded as ONE document.



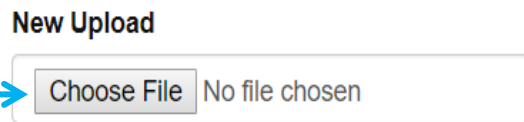
- Click on "Upload document." This will bring you to a new page.



- Scroll down and click on the dropdown box for "Category" and select "Proposal/Proposal Summary"



- Click on "Choose File" or it may say "Browse." This will open a pop-up.



- In the pop-up box, select the student's proposal from where it is saved on your computer or USB drive. Click on "Open" or "Choose."

- The name of the student's file will appear next to the Choose File/Browse button.



- Click on "Upload."

- This should take you back to the Proposal Summary page and the file will now be listed under "Uploaded Documents."

7) Start the approval process:

- At this point, everything should be ready (*See screen capture below*): 1) Student name(s) listed; 2) under My Forms, both the Proposal Award Processing and Internal Commit Forms should have a status of "Complete;" and 3) the proposal should be listed under "Uploaded Documents."

Proposal Summary

Title
"Magellan-Student Last Name-Title"

Project

Status
Not Submitted

Type
New

Dates
01/01/2017 - 04/30/2017

Awardee Department
Sponsored Awards Management

Internal Request Type
Magellan Scholar Program

Lead PI

Mrs. Julie Morris
Sponsored Awards Management

Students

Jane Doe
Theatre and Dance, Department of

John Smith
Theatre and Dance, Department of

Tools

Audit Trail

Delete This Proposal

Print Cover Page

My Forms

Proposal/Award Processing Form (PAP) ✓ Complete

Internal Commit ✓ Complete

Uploaded Documents

Doe_Smith.docx X Delete

Other
Mrs. Julie Morris
12/20/2016

For external proposal submissions please upload the following documents, as well as any other necessary support documents:

- Proposal/Proposal Summary
- Budget/Budget Justification

Upload Document

1) Are all students listed?

2) Are the following two forms complete: Proposal Award Processing and Internal Commit?

3) Is student's proposal attached under "Uploaded Documents" and named correctly?

4) You are now ready to click on "Start Approval Process" button

b. Click on the "Start approval process" button above "My Forms."

- A pop-up will appear that says "Are you sure..."
- Click on Submit Proposal.
- A note will appear at the top of your USCeRA main page stating that the proposal has been successfully submitted with a proposal number listed.

Please call me if you have ANY problems – I am happy to help and can often fix things on the admin side: 803-777-4649

**If you do not see a proposal number after submitting, something is wrong.
Please call me at 803-777-4649**