

# FOR MENTORS: Magellan Scholar Mentor Forms and USCeRA Submission Guide

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## 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.

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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](mailto: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](mailto:jmorris@sc.edu) or 803-777-4649.

- 3) **Login to USCeRA** ([sam.research.sc.edu/uscera/](http://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](mailto: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](mailto: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](mailto: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.

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**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.

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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](mailto: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](mailto:jmorris@sc.edu) or [OUR@sc.edu](mailto:OUR@sc.edu) and upload it for you.

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

#### Uploaded Documents

No uploaded documents found.

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

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

- Proposal/Proposal Summary
- Budget/Budget Justification

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

**i** Upload Document

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

#### Category

Proposal/Proposal Summary ▼

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

#### New Upload

Choose File No file chosen

- 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.

Upload

- 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

**Tools**

Audit Trail

Delete This Proposal

Print Cover Page

**Students**

Jane Doe  
Theatre and Dance, Department of

John Smith  
Theatre and Dance, Department of

**My Forms**

Proposal/Award Processing Form (PAP) **Complete**

Internal Commit **Complete**

**Uploaded Documents**

Doe\_Smith.docx  
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**