



UC Davis Comprehensive Cancer Center Shared Resources user account and billing information guide

Step 1 - User account creation

Follow this URL to the Shared Resources web application:

- Select New User
- Enter your first name, middle initial (if you have one), last name, and email address. A User ID will be created for you automatically based upon your name and will be comprised of your first initial, middle initial (if you have one), and your last name.
- Select Next
- Enter your phone, degree(s), campus mail address, mailing address, city, state, zip
- If you work for UC Davis, Lawrence Livermore, or CADHS enter the following:
 - Select your UC Davis location/school/department/division.
 - Select your rank/title.
 - If you have a dual-department or academic appointment, select your UC Davis location/school/department/division accordingly.
- Otherwise, if you work for a Non- UC Davis company or employer, enter the following:
 - Select your company from the drop-down list.
 - If the company is not listed, select 'Click here to enter a new company' and enter the following information:
 - Company name, contact, address, city, state, zip, company phone, company email address, company tax id, contact name, contact phone, contact fax, contact email, academic institution (yes or no).
 - **Note:** you will be asked to enter a PO at the time of the service request submission, so you need to have it ready at that time. For questions regarding a Non- UC Davis Company and POs, contact Sharon Ram at 916.734-3253.
- Select Are you a PI/Mentor? This is important if you enter and maintain billing information.



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- If you are not a PI/Mentor, select the PI(s)/Mentor(s) that you work for. **Important:** This links you to your PI's billing information so that you can request services.
- Enter a password that you will remember.
- Select Submit and you will be automatically logged into Shared Resources.

Step 2 - Billing information for grants or accounts

If you are a UC, Lawrence Livermore, or CADHS employee you must be a PI/Mentor OR work for a PI/Mentor and have an account or grant information in the Shared Resources system to utilize services. Otherwise, if you work for an outside agency, then specify this by entering the Non-UC Davis Company or employer in your user profile. Note: You cannot work for both a UC Davis department and an outside agency.

Follow this URL to the Shared Resources web application:

<http://www.ucdmc.ucdavis.edu/cancer/research/sharedresources/login.html>

From the menu, select Profile > Edit Profile

In the PI Information section:

- Select "Are you a PI/Mentor?"
- If you are not a PI/Mentor, select the PI/Mentor(s) that you work for.

If you work for a PI/Mentor their billing information must be in the system so that you can utilize their account/grant, otherwise, you must enter your billing information in Step Two.

For UC employees only:

From the menu, select Profile > Edit Billing Information

- Select Add New Grant/Account.
- Enter the grant or account title.
- Enter the grant or account number.

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- Select the grant or account institution.
- Select the PI/Mentor owner for this grant/account .
- Select the Account Manager (the person responsible for the grant/account details).
- Enter the DaFIS account.
- Enter the recharge number(s).
- Enter the Start date.
- Enter the End date.
- Enter the Annual Direct Amount.
- Enter the Annual Total Amount.
- For grants only, select the Agency, Institute, and Funding type.
- Select Submit.