IMPAC II GM Lead User's Group

Date: October 8, 2003
Time: 9:00–11:00 a.m.
Location: 6001 Executive Building, Conference Room A1/A2
Advocate: Michael Loewe

Next Meeting: November 12, 9 a.m., 6001 Executive Blvd., Conference Room A1/A2

Actions Items

1. (All) Begin brainstorming about requirements for the Grants Management (GM) Module redesign; discuss GM redesign with respective ICs, both GM and Program staffs.

2. (All) Email Cathy Walker, Bob Tarwater, or Mike Loewe if interested in volunteering for GM redesign JAD.

3. (Mike Loewe) Invite Diana Dixon to present the Grant Folder at the next GM Lead Users meeting.

4. Mike Loewe) Ask GMAC if all grants in the last year of support are eligible for no-cost extensions or if there are exceptions.

5. (Cathy Walker) Email electronic version of the November release highlights for the GM Module**.**

6. (All) Review reminders for Carryover, FDP, and SNAP and distribute information to respective ICs.

7. (All) Ensure that your IC is on board with the Grants Closeout Module; email Mike Loewe any comments about the system.

8. (All) Brainstorm nomination possibilities for a new GM Lead Users Group co-chair.

Handouts

1. November Release of IMPAC II Grants Management Module

GM Redesign

Cathy Walker explained that a major FY04 priority for the eRA Architecture group is the redesign and conversion of all client-server applications into J2EE applications, one of which is the Grants Management Module. Cathy said that she will be attending the eRA Retreat on October 9–10 to discuss eRA priorities for FY04, and she hopes the redesign of GM will be high on the list. Cathy and Mike Loewe urged group members to begin thinking about requirements for the GM redesign. All Lead Users should begin asking their respective ICs about possible enhancements to GM. Mike asked that group members not only survey GM staff, but Program staff as well, since there will be a lot of cross functionality between the GM Module and the

Program Module. Mike asked group members to think about a few questions when brainstorming about the GM redesign—

- ❑ How can we identify Administrative Supplements?
- ❑ How can we track co-funded grants?
- ❑ Where should notifications be stored, sent?
- ❑ How can we improve the system overall to make everyday work tasks easier?

A Joint Application Development (JAD) group will be formed to both reexamine the screens in the current GM Module and define requirements and enhancements for the new GM Module. Cathy said that several GM Lead Users have already been selected for the JAD, though she encouraged everyone to participate. She asked interested parties to email Bob Tarwater, Mike Loewe, or herself.

Action: **(All) Begin brainstorming about requirements for the Grants Management (GM) Module redesign; discuss GM redesign with respective ICs, both GM and Program staffs.**

Action: **(All) Email Cathy Walker, Bob Tarwater, or Mike Loewe if interested in volunteering for GM redesign JAD.**

November 7 Release of GM

Cathy distributed a handout (ENTER URL) highlighting GM features, enhancements, and maintenance fixes scheduled for release November 7:

- ❑ *Type 6 and 7s*—Users will be able to create a Type 6 or 7 in GM for Type 8s.
- ❑ *Implementation of eRA Password Policy—*The policy will require users to change their password every 180 days. Passwords will have to be eight characters and cannot include the user name or begin or end with a number. The Password Policy is essential to the security of the eRA system.
- ❑ *J2EE Grant Folder—*GM will call the new J2EE (Web) Grant Folder instead of the old client-server Grant Folder. Cathy explained that she is working with Diana Dixon to ensure that the J2EE Grant Folder contains all the data that would be useful to Grants Management staff. There is discussion that the Grant Folder should be business-area specific. Mike suggested inviting Diana Dixon to present the grant folder at the next GM Lead Users meeting. The group agreed that this would be helpful.
- ❑ *GM Worksheet—*The GM worksheet will include checklist items. Previously, the worksheet did not contain checklists.
- ❑ *eSNAP Flag—*The eSNAP flag on the Type Received Date Workload screen will be corrected.
- ❑ *Edit Checks—*The edit checks for gender and minority codes for training grants will be corrected.
- ❑ *NGA Changes*—CDC requirements will be accommodated, grant numbers will be consistent, and alignment problem with F&A costs will be fixed.

❑ *Just-in-Time Documents*—Grantees will be able to submit just-in-time documents (other support, animal subject information, and IRB Approval date and information on Human Subjects Education Requirement) through the NIH eRA Commons. An email notification will go to the assigned Grants Management Specialist and the IC Central email address (DEA). Just-in-time documents will also be available through the Grant Folder.

❑ *No-Cost Extension notifications*—Grantees will be able to submit no-cost extension notifications through the NIH eRA Commons. All grants in the last year of support that have not already been extended will be eligible for extension. Notifications will be sent to the assigned Grants Management Specialist, the assigned Program Official, and the central email address (DEA). Group members asked if there were any cases in which a no-cost extension would be denied. Mike said he was unsure, but that this was an important matter to discuss with GMAC. He agreed to ask GMAC if all grants in the last year of support are eligible for no-cost extensions or if there are exceptions.

Finally, Cathy agreed to email the GM Lead Users an electronic version of the November release highlights for the GM Module.

Action: **(Mike Loewe) Invite Diana Dixon to present the Grant Folder at the next GM Lead Users meeting.**

Action: **(Mike Loewe) Ask GMAC if all grants in the last year of support are eligible for no-cost extensions or if there are exceptions.**

Action: **(Cathy Walker) Email electronic version of the November release highlights for the GM Module.**

Carryover, FDP, SNAP Reminders

Cathy referred group members to the November Release handout to discuss a few important reminders concerning Carryover, FDPs, and SNAPs. Reminders include the following:

❑ *Carryover*—Specialists need to answer Y/N in the field labeled "Automatic Carryover" for each grant. If Carryover=Y, SNAP defaults to Y. If Carryover=N, SNAP defaults to "NA."

❑ *FDP*—If a grantee is an FDP institution, Specialists should enter "Y." "No" to FDP removes a particular grant from NIH Terms of Award and applies grant specific terms.

❑ *SNAP*—If Specialists answer "No" to SNAP for a SNAP-eligible grant, SNAP authorities will be withheld for that particular grant.

Cathy asked that all group members review these reminders and distribute the information to their respective ICs.

Action: **(All) Review reminders for Carryover, FDP, and SNAP and distribute information to respective ICs.**

Helpdesk

Dave Chiccirichi explained that the Helpdesk is in the process of transitioning to a new system called Remedy that is designed to track work tickets. Once the transition is complete, the Helpdesk will begin working with the Center for Information Technology (CIT). CIT will serve

as the receipt point for all glitches, bugs, and questions about the eRA system and will generate and send work tickets to the Helpdesk who, in turn, will address problems. However, while all GM users will have to report difficulties to the CIT, the GM Lead User in each IC may continue to contact the Helpdesk directly.

Grants Closeout Module Update

Mike said that while several ICs have successfully "hopped on board" with the Grants Closeout Module, they are not "keeping up with it." Mike explained that all ICs will be contacted to ensure that they are using, maintaining, and regularly updating data in the Grants Closeout Module. Information in the Closeout Module will be released to grantees via the NIH eRA Commons in January, so it is essential that ICs present updated data in the system so that grantees can view correct information regarding their grants. Mike asked group members to contact him with any comments about the system.

Finally, Mike announced that Dr. Zerhouni has been commissioned to study risk assessments and that one of those assessments is the Grants Closeout Module. Mike will update the group as developments occur.

Action: **(All) Ensure that your IC is on board with the Grants Closeout Module; email Mike Loewe any comments about the system.**

Standardized Spreadsheets Update

Pam Mayer explained that future standardized spreadsheets will be able to handle and import subproject data into IMPAC II if subproject records exist. This new feature will be available in the new Beta version of the spreadsheet.

Finally, Pam asked for volunteers to participate in the Standardized Spreadsheet Working Group. Lately, attendance has been rather low. Mike encouraged group members to participate in the working group, emphasizing its importance to GM and eRA as a whole.

Co-Chair for GM Lead Users Group

Bob Tarwater asked the group members to begin thinking about a new co-chair for the GM Lead Users Group. This position is effective January 2004.

Action: **(All) Brainstorm nomination possibilities for a new GM Lead Users Group co-chair.**