

# Receipt and Referral User Group Meeting

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**Date:** August 2, 2002  
**Time:** 9:30 a.m.–11:00 a.m.  
**Location:** Rockledge 2, Room 3014  
**Facilitator:** Sara Silver  
**Next Meeting:** TBD. After October Release

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## Action Items

1. (Sara) Talk to Jerry Stuck and Tim Twomey about adding Expertise functionality in the Commons so that the expertise information can be captured at the time of account creation for a PI.
2. (All) Send any problems that are encountered with modifications in this release to the Helpdesk with a copy to Sara Silver.
3. (Sylvia) Test withdrawn grant issue after the bridge is shut down in the October deployment.
4. (Lisa/Mythili/Sara) Send samples of screens that couple the flag and funding agency data fields (for SBIRs Phase 2 where prior funding was outside NIH) to Suzanne.
5. (Sara/Kimberly/Sylvia) Draft a clearer error message that will appear when you try to type in a different external organization than what is already in the PI profile.
6. (Mythili) Check to see the duration of a database lock when two requests for a serial number come in at the same time.
7. (Sara) Submit for a change in October so that when grants are changed to a new IC, the old GMO and GS assignments are deleted.
8. (Suzanne) Forward trouble email, regarding “Auto assign, FIRCA revisions and not carrying over for R21 and R03s,” to Sara Silver.
9. (Lisa/Mythili) Bring a list of problem mailers to the next meeting.
10. (Sara) Investigate the issue of losing the PI name that was in IMPAC I when bridged to IMPAC II.

## Expertise Information

Before the meeting “officially” began, there was some discussion regarding Expertise information. The group agreed that they would like the ability for the PI to enter expertise information at the time of account creation so that it can be captured earlier than it currently is. Richard Panniers said this had been discussed with George Stone and Jerry Stuck during the Commons requirements-gathering process as a future release item.

**Action: (Sara) Talk to Jerry Stuck and Tim Twomey about adding Expertise functionality in the Commons so that the expertise information can be captured at the time of account creation for a PI.**

## Release Notes for RR Version 1.3.2.0

The group reviewed the release notes ([http://impacii.nih.gov/applications/apps\\_rr.cfm](http://impacii.nih.gov/applications/apps_rr.cfm)) and agreed that, for the modifications that someone in the group has had a chance to use, the modifications work; for the others, which are dependent upon upcoming events, e.g., Fellowship deadlines, the group will note any problems encountered.

**Action: (All) Send any problems that are encountered with modifications in this release to the Helpdesk with a copy to Sara Silver.**

## October Release

A number of issues were discussed regarding October release items.

Item	Comments
6-digit serial numbers.	All aspects of this issue either were released in July or will be resolved in October.
Table-driven autoassign functionality.	After this is implemented, DDR will send requests for modifications to the Helpdesk. The helpdesk will forward them to Emily Mitchell, who will make the changes.
Withdrawn grants not being withdrawn by bridge action.	This has been fixed but the deployment is dependent upon the shutdown of the bridge, which is scheduled for October. <b>Action: (Sylvia) Test withdrawn grant issue after the bridge is shut down in the October deployment.</b>
Change in SSN generating new profile.	This will be fixed for the October release so that a new profile is no longer generated when the SSN is changed.  In a related issue, about 400 duplicate profiles are being created a month. A report is being run and each duplicate is being investigated and resolved.
IC changed to another IC, allow user to enter the suffix.	For a 901, you can now amend the application data when the application changes ICs by adding the suffix. For October, this functionality will be added to the Referral Data screen.
SBIR Phase 2	The group approved the proposal with one change: the group proposed putting the flag and funding agency data fields near one another so they are entered at the same time. <b>Action: (Lisa/Mythili/Sara) Send samples of screens that couple the flag and funding agency data fields (for SBIRs Phase 2 where prior funding was outside NIH) to Suzanne.</b>  It was noted that the flag is in the database; if people want it to show in Review as well, they need to contact the Peer Review Advocate with the request.

Item	Comments
When a Type 2 becomes a Type 9, carry forward the amendment.	This issue went before the EPMC and was approved. Users now will be able to enter the suffix code.
Error message when you type in a different external organization that currently is in the PI profile.	The group agreed that the wording of this error message must be made clearer. <b>Action: (Sara/Kimberly/Sylvia) Draft a clearer error message that will appear when you try to type in a different external organization than what is already in the PI profile.</b>
Duplicate serial numbers.	The same serial number occasionally can be assigned to two different grant application if two users submit the request and both requests hit the system at the same time. To mitigate this event, a database lock is being instituted so that when two requests come in at the same time, one is assigned the number and the other gets a message to resubmit the request. This will require a very brief lock of the system. <b>Action: (Mythili) Check to see the duration of a system lock should a fix be put into place to lock the system when two requests for a serial number come in at the same time.</b>
Carrying forward PCC code for specific ICs.	Sara has sent an email to Donna Frahm regarding this issue and is waiting for a response.
Storing grant, IC-change history.	The change has been approved to store one previous organization when a grant application changes ICs. However, in addition, it was suggested at the eRA Team meeting that the system store also the IPF number, which will require more complexity and there is some question regarding its merit.
Do not create a new record for Type 1 change of organization.	The approach before the eRA Project Team for approval is to allow the user to modify the existing grant application record when there is a Type 1 change of organization. The change would be accepted when the user “saves” the screen, and the system would not create a new record. This must happen before IMPAC I is turned off.
There is a new IC (NIBIB) and users can’t change GMO and GS assignments.	When grants are being changed, the assignments (for GMOs and GSs) are not being deleted. <b>Action: (Sara) Submit for a change in October so that when grants are changed to a new IC, the old GMO and GS assignments are deleted.</b>

## Other Issues

Issue	Discussion
a. Dual Assignment problems for 901s	Fixed in the July release.
b. Dropping dual assignments	This issue is under investigation.
c. Autoassign: FIRCA revisions and not carrying over for R21 or R03s	<p>This issue was not sent to Lisa/Mythili by the helpdesk. There seems to be a bug in the system since the system is assigning R21, and this is illegal.</p> <p><b>Action: (Suzanne) Forward trouble email, regarding “Auto assign, FIRCA revisions and not carrying over for R21 and R03s,” to Sara Silver.</b></p>
d. Assignment mailer issues	<p>This issue is mostly a data issue with SRAs who are not putting in their Work address or where there are multiple Profiles and the system pulls the wrong address from the least up-to-date Profile. This has to be fixed in CM and Sara is working with developers on it.</p> <p>Suzanne added that this issue is requiring additional work because the mailers have to be manually checked for addresses.</p> <p>For the March release, the SRA Work addresses have to be in the system. If one is missing, there will be a mechanism to require the SRA to enter the information.</p> <p><b>Action: (Lisa/Mythili) Bring a list of problem mailers to the next meeting.</b></p>
e. Serial number issue (example 2 T32 ES007284-06 and 2 R01 ES00784-06)	Currently, the system won't allow you to use the old serial number when the grant changes from a T32 to an R01. However, PIs like to keep their grant serial numbers, some of which date back 20 years. The group suggested that the grant serial number remain the same but with a different prefix and an -06 suffix.
f. Loss of PI name in IMPAC I	<p>This bridge problem was just identified.</p> <p><b>Action: (Sara) Investigate the issue of losing the PI name that was in IMPAC I when bridged to IMPAC II.</b></p>
g. Study section assignments disappearing	This issue happened for SNEM 5 only because the code for SNEM 5 had not been added and set up in IMPAC I. It has now been added so the problem is resolved.
h. Tables/Reports	A developer has been assigned to this report issue and is working on it.

Issue	Discussion
i. Upcoming release of new PHS 416	There is a new Fellowship Form that may or may not be required for December application submissions. The new form will be released after the Aug. 5 deployment, and whether or not it will be required for December submissions will be announced then.

## Attendees

Cragg, Kimberly (CSR)

Datoc, Stella (NGIT)

Dutcher, Sylvia (Mitretek)

Fisher, Suzanne (CSR)

Panniers, Richard (CSR)

Roberts, Leah (CSR)

Sampath, Mythili (NGIT) for

Lisa Chen

Seppala, Sandy (LTS/OCO)

Silver, Sara (OD/OER)

Stanfield, Brent (CSR)