



eRA Program Official Users Group (ePUG)

Date: May 12, 2004, Wednesday
Time: 1:00–3:00 p.m.
Location: Rockledge 2, Room 9100
Advocates: Carlos Caban, Janna Wehrle

Next Meeting: Wednesday, June 9, Rockledge 2, Room 9100

Actions Items

1. (All) Email Janna Wehrle if you are interested in participating in a focus group that will identify the “gaps” in the 398 and the E-Grants Research and Related dataset.
2. (Janna Wehrle) Email Michael Goodman list of ePUG members interested in participating in a focus group that will identify the “gaps” in the 398 and the E-Grants Research and Related dataset.
3. (Chanath Ratnanather, Carlos Caban, Janna Wehrle) Arrange a time for Mike Goodman to present a CGAP system demonstration at a future ePUG meeting.
4. (All) Review PGM Training Scenarios and determine if any changes, modifications, or additions are necessary to accommodate Program Assistants from DEAS.
5. (Carlos Caban, Janna Wehrle, Chanath Ratnanather) Demo PGM to DEAS.
6. (All) Review Pre-Submission and General Resources pages in the PGM. Determine if any hyperlinks should be eliminated or added. Forward suggestions to Janna Wehrle.

Handouts

1. E-Grants Update: Status on Research and Related Dataset Presentation:
http://era.nih.gov/docs/E-Grants_presentation_ePUG_meeting.pdf
 2. Program Module Release Notes:
http://impacii.nih.gov/pgmdoc/PGM_RNV25131_April2004.pdf
 3. Checklist Release Notes:
http://impacii.nih.gov/pgmdoc/ICADMIN_RNV11101_April2004.pdf
 4. Training Scenarios for PGM:
http://impacii.nih.gov/pgmdoc/PGM_Training_Scenarios.pdf
 5. Pre-submission Page in PGM:
http://apps.era.nih.gov/pgm/general/presubmitResources.jsp?menu_itemPath=Pre-Submission
 6. General Resources Page in PGM:
http://apps.era.nih.gov/pgm/general/generalResources.jsp?menu_itemPath=General+Resources
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E-Grants Update: Status on Research and Related Dataset

Michael Goodman

Michael Goodman, a Business Analyst and Task Manager working on the eRA Project, provided a brief update on the recent activities of E-Grants, particularly on the effort to standardize datasets across all Federal grants communities: http://era.nih.gov/docs/E-Grants_presentation_ePUG_meeting.pdf. Janna Wehrle explained that it is important for the NIH to be prepared for E-Grants and to be aware of the challenges posed to the NIH.

Michael explained that the Inter-Agency Electronic Grants Committee (IAEGC) was formed to coordinate the effective use of electronic commerce throughout the federal grants community. As such, the IAEGC has been charged with establishing common data requirements and common business processes in order to eliminate redundancy and complexity experienced by grantees when submitting applications. That is, the IAEGC is working to promote a “common face to the grantee,” increase efficiency for applicants since much of the same information can be reused on subsequent proposals to other agencies, and to reduce the number of unique application forms that grantees must fill out and that Grants.gov must maintain.

To accomplish this mission, the IAEGC has worked to establish five common cross-data elements for grant applications and awards: the Core dataset based on the SF424 (this data is used across all agencies), the Research and Related dataset, the Arts and Humanities dataset, other Cross-Agency datasets, and State, Local, Non-Profit, and Other datasets.

The development of the Research and Related dataset (the dataset most relevant to the NIH) is underway. Version 1 data elements and forms have been completed and submitted to the Federal Register for public comment. The public and agency remarks received during this comment period will be rolled into Version 2 of the Research and Related dataset.

Michael explained that any agency that uses the R&R dataset (the NIH included) must use the PureEdge R&R form. Any agency-specific data that is not supported on this form must be collected in one of two ways: as a binary attachment (PDF) or as a separate, supplemental form. E-Grants strongly encourages agencies to reevaluate the need for data that falls outside of the R&R set.

To account for the “gaps” between the new 398 and the R&R Form, NIH is developing an agency-specific form. eRA plans to pilot a grant opportunity using this NIH-specific form and the R&R dataset in October of 2004. In the meantime, Michael explained that the NIH must work through several challenges to prepare itself for the wide usage of Grants.gov. NIH must—

- Analyze and evaluate data elements required on the 398 but not found on the R&R form. Currently, Michael is in the process of establishing three working groups (one in Review, Program, and Grants Management) to focus on this task. These groups will then meet together to discuss the “gaps” in the 398 and the R&R form and determine the specific needs of the NIH and the OPDIVs. Michael asked that Janna send him a list of three to four ePUG members interested in participating in this focus group.

Action: (All) Email Janna Wehrle if you are interested in participating in a focus group that will identify the “gaps” in the 398 and the E-Grants Research and Related dataset.

Action: (Janna Wehrle) Email Michael Goodman list of ePUG members interested in participating in a focus group that will identify the “gaps” in the 398 and the E-Grants Research and Related dataset.

- Analyze data solicited on the R&R form to see if NIH can capitalize on the opportunity to collect new information.
- Determine how the grant image will be maintained and presented.

In response to Michael’s presentation, the ePUG members posed several questions:

- *What is the CGAP project at the NIH?*—Beginning in 2002, the CGAP Project works closely with Service Providers who are developing grant authoring and submission tools for grantees. The CGAP system is a backend submission engine that was designed to receive and process XML grantee data sent by the Service Providers. So far, the CGAP system has gone through three iterations; the next CGAP release will be sometime in the June or July timeframe. Currently, the CGAP Focus Group is working on how to produce the grant image once it’s received at the NIH as well as how to handle the submission of error corrections.

Chanath Ratnanather suggested that Mike return to a future ePUG meeting and present a demonstration of the CGAP system. Mike agreed to do so.

Action: (Chanath Ratnanather, Carlos Caban, Janna Wehrle) Arrange a time for Mike Goodman to present a CGAP system demonstration at a future ePUG meeting.

- *How does the CGAP Project “fit in” with Grants.gov?*—eRA will still use a lot of the backend that was initially created for CGAP when eRA moves to Grants.gov. Ultimately, Service Providers will begin sending the data they receive from grantees to Grants.gov instead of to the NIH. The information sent to Grants.gov will then flow to the NIH.
- *What happens to the data once it arrives to the NIH?*— It is uncertain whether the NIH will be able to see the actual form submitted by the grantee or just the data itself. Decisions need to be made on this issue. The vision is that the data, not the form, will flow “downstream” through the various modules in eRA. However, this vision can only be accomplished if everything is electronic and functioning; there can no longer be paper processes. This is the real challenge for eRA.
- *How will Grants.gov handle the electronic submission of multi-project grants?*— Mike said that handling multi-project grants has proven problematic for the first version of the Research and Related dataset. However, this issue is already being looked at and solutions are being suggested.
- *How is eRA publicizing the move to E-Grants?*—Currently, there has been little publicity regarding E-Grants primarily because Grants.gov wants to ensure that it is prepared to handle increasing volume of applications. Carlos Caban suggested that

the group visit the Grants.gov URL for more information:
<http://www.grants.gov/Find>

Demonstration of New PGM and Checklist Features

Chanath Ratnanather

Chanath distributed the release notes for both the new Program Module (http://impacii.nih.gov/pgmdoc/PGM_RNV25131_April2004.pdf) and Checklist (http://impacii.nih.gov/pgmdoc/ICADMIN_RNV11101_April2004.pdf) features and presented the bug fixes and enhancements in a live demonstration.

Upon reviewing the new releases, the group made the following comments:

Program Module

- Fix the system so that a space entered between two names in the name search field does not cause the query to return zero records. This bug is crucial to fix, especially since there are many last names that are comprised of two words (i.e. van hook, etc.). The group noticed, however, that the system responds properly if the user combines the two words together without a space.

Checklist

- Remove the numbers on the left hand column in the Checklist. Currently these numbers do not match the item numbers and the a,b,c subsections. It would be best to remove this far left hand column entirely rather than try to map it correctly with the item numbers.

Finally, Chanath demoed a critical bug in the Other Portfolio section of PGM. The “Return to Portfolio” feature implemented via the Approvals page does not work when the user is in the “Other Portfolio section of PGM. Instead of returning the user to the selected PO’s portfolio, the system returns the user to the users own portfolio (i.e. My Portfolio). This results in erroneous menu tabs as well. With MEO being implemented at NIH, this could be escalated to the level of “critical,” in which case eRA will release an emergency patch to fix the issue.

MEO and PGM

Janna Wehrle

To train Program Assistants from DEAS, it will be necessary to modify the set of training scenarios so that they are suitable for Program Assistants. Janna asked the group to review the current training scenarios (http://impacii.nih.gov/pgmdoc/PGM_Training_Scenarios.pdf) that were developed by ePUG and—

- Determine what changes (if any) are required so that the scenarios are understandable, helpful, and appropriate for incoming Program Assistants
- Identify any additional scenarios that would be useful.

Finally, Carlos Caban explained that he has offered Mary Frances Deuthsch, the DEAS Director, to present a demonstration of the PGM module to DEAS staff members. This way, staff members can see PGM capabilities as the DEAS designs its procedures.

Action: (All) Review PGM Training Scenarios and determine if any changes, modifications, or additions are necessary to accommodate Program Assistants from DEAS.

Action: (Carlos Caban, Janna Wehrle, Chanath Ratnanather) Demo PGM to DEAS.

Pre-Submission and General Resources Pages

Janna Wehrle

Janna asked group members to review the Pre-Submission and the General Resources pages in the PGM and determine if any content should be eliminated, added, rearranged, etc. Suggestions had already been submitted by Carlos Caban and Thomas Hilton and distributed to the ePUG. The group suggested the following:

- Indicate whether the hyperlinks listed are accessible to the public or strictly for internal NIH staff only. It is important to try to only feature links that are accessible to the public, especially because a PO will be referring a PI to these links.
- Include the NIH Grants Policy Statement on the General Resources Page: http://grants.nih.gov/grants/policy/nihgps_2003/index.htm
- Add CRISP to the General Resources Page.
- Add the Roadmap to the General Resources Page: <http://nihroadmap.nih.gov/>

The group will send additional suggestions to Janna. Chanath explained that these changes will be implemented by the next release.

Action: (All) Review Pre-Submission and General Resources pages in the PGM. Determine if any hyperlinks should be eliminated or added. Forward suggestions to Janna Wehrle.

Attendees

Armistead, Allyson (OER/eRA/PCOB)	Heath, Anne (NCI)	Sorensen, Roger (NIAAA)
Caban, Carlos (OER)	Hilton, Thomas (NIDA)	Wehrle, Janna (NIGMS)
Delcore, Sandy (NICHD)	Koepke, Karen Mann (NINR)	Whalin, Micheal (NICHD)
Efendiev, Alex (OER/eRA)	Ratnanather, Chanath (OER/eRA)	Wong, Shen (NCCAM)
Finkelstein, David (NIA)	Reese, Karen (NIAID)	
George, Janet (NHLBI)	Siegert, Mark (OER/eRA)	
Goodman, Michael (OD)		

