



eRA Program Official Users Group (ePUG)

Date: May 14, 2003
Time: 1:00–3:00 p.m.
Location: EPN Building, Rm H
Advocates: Carlos Caban, Israel Lederhendler

Next Meeting: June 11, 2003, Wed., 1:00 p.m., Rockledge 1, Rm 3502

Actions Items

1. (Chanath Ratnanather, Israel Lederhendler, Carlos Caban) Discuss list of Program Module pilot enhancements received at the eRA Symposium.
2. (Carlos Caban, Israel Lederhendler) Develop and implement marketing plan for the new Program Analyst/Assistant role in the Program Module.
3. (All) Email Cathy Walker to participate in the July pilot of the Program Official (PO) Checklist.
4. (Chanath Ratnanather, Cathy Walker) Forward ePUG's suggestions for eRA Grant Folder to Grant Folder Analyst.
5. (Carlos Caban, Israel Lederhendler, Chanath Ratnanather) Ask the Program community during scheduled presentation at the National Heart, Lung, and Blood Institute (NHLBI) to evaluate the Program Module (PGM) in light of its current IC-extension system.
6. (All) Schedule a presentation of the Program Module (PGM) with the Program staff of respective ICs; ask various Program communities to evaluate PGM in light of their current IC-extension systems.
7. (Carlos Caban, Israel Lederhendler, Chanath Ratnanather) Develop comprehensive research plan for gathering information about Program staff business practices across the NIH and about similarities/differences across all IC-extension systems.

Announcements

New Co-Advocate—Israel Lederhendler is the new eRA co-Advocate for Scientific Program Management, replacing Bud Erickson. Israel will attend the eRA Project Team meetings, co-chair the ePUG meetings with Carlos Caban, and work with Carlos to liaison between the Program community and the eRA Project Team.

Demo of Program Module—Carlos, Israel, and Chanath Ratnanather are scheduled to present the Program Module to the National Heart, Lung, and Blood Institute (NHLBI) this month.

Symposium Feedback

The Program Module (PGM) was well received by the 300 attendees of the eRA Symposium on April 30. Forty people attended the demo session of the PGM pilot following the program and

approximately 150 participated via videocast. The general sentiment regarding the pilot was that the PGM is a useful program to the daily tasks of the NIH Program Official. The pilot is now currently posted on the Web for public viewing and interaction

<http://impacweb3.oer.od.nih.gov:8074/pgm/>

Chanath said that he received a host of suggestions for the PGM pilot from Symposium participants. He asked Carlos and Israel if they would meet with him to discuss these enhancements further.

Chanath asked the group for any additional comments regarding the PGM. The group suggested the following:

- Use a space or slash between month and year in the Council Dates.
- Check on grants that have “fallen through the cracks.” Dave Finkelstein and Roger Sorenson reported missing grants.
- Provide the navigation path in the header portion of each screen (e.g., PGM → Program Approval → PO Checklist).

Action: (Chanath Ratnanather, Israel Lederhendler, Carlos Caban) Discuss list of Program Module pilot enhancements received at the eRA Symposium.

Program Analyst/Assistant Role

Chanath said that he is currently working on adding a new role to PGM for Program Analysts/Assistants. Program Analysts/Assistants will not have sign-off authority, but will have access to every other aspect of the PGM, including checklists, PO notes, and PO sign-notes. Chanath asked the group to confirm whether Program Analysts/Assistants should have access to PO sign-notes. *The group agreed that Program Analysts/Assistants should have access to this information.*

The group also agreed that it would be best to advertise the new Program Analyst/Assistant role to the NIH Program community soon because the IMPAC II Coordinators in each IC will need to organize user administration roles and passwords before the release of the new role. Carlos said that once the role is established in the PGM, he will ask Scarlett Gibb, Chief of the eRA Communications and Outreach Branch (COB), to include a news article in the eRA monthly newsletter, *Inside eRA*. He also suggested presenting the new Program Analyst/Assistant role at the Extramural Program Management Committee (EPMC) meeting.

Action: (Carlos Caban, Israel Lederhendler) Develop and implement marketing plan for the new Program Analyst/Assistant role in the Program Module.

Program Checklist

Cathy Walker presented a demo of the customizable Program Checklist scheduled for the October release:

<http://erawebdev.od.nih.gov/UI/CustomizableChecklist/POChecklist.asp>

Users will be able to access the Program Checklist through the Program Module. Cathy explained that users must first go to the *Program Approval* screen and then click on the link “Program Checklist.”

The Checklist will feature eight mandatory questions. Cathy emphasized that ICs will be able to add their own questions.

The group suggested the following enhancements:

- Provide a text description above all the notes/comments boxes. These text descriptions should explain to users what the notes are, who they are intended for, and at what point in the process they should be completed.
- Add PO notes box on checklist page. The group agreed that the history of the grant should be present on this page.
- Change text on completed checklists page from “Completed by Joe Smith on date” to “Checklist completed by Joe Smith on date.”
- Include a feature where Program Officials (PO) are notified when a Grants Specialist has posted notes to the POs.
- Consider moving the grant # from the right-hand side of the screen to the left-hand side.
- Eliminate the checkbox column. The group agreed that all eight questions will be mandatory. Therefore, a checkbox indicating whether or not a question is mandatory is unnecessary.
- Consider moving the checklist questions from the left-hand side of the screen to the right-hand side of the screen. The group agreed that users would be more likely to scroll to the right-hand side of the screen if the questions are featured as the last column.
- Include the “Program Checklist” link that is featured on the *Program Approval* screen under the header titled “SIGN OFF.” The group agreed that the Program Checklist is part of the sign-off process and should be featured under the SIGN-OFF header accordingly.
- Include a warning to users to save notes before exiting the *PO Checklist* screen.
- Change “Checklist Complete?” button to “Submit Checklist.” The group agreed that “Checklist Complete?” was not an intuitive label for users wanting to submit a checklist.
- Indicate “In Progress” by the “Program Checklist” link that is featured on the *Program Approval* screen if the checklist has not been completed. The group agreed that an “In Progress” indicator would remind users whether or not the checklist has been completed.

Finally, Cathy announced that a pilot of the Checklist is scheduled for release in July. She asked group members to email her if they would like to participate.

Action: (All) Email Cathy Walker to participate in the July pilot of the Program Official (PO) Checklist.

New eRA Grant Folder

The members also looked at the new eRA Grant Folder and provided feedback on how it would be more useful for Program Officials and other staff. Specifically, the group agreed that it would

be helpful if the grant folder included all of the old applications and progress reports (competing applications). Chanath and Cathy agreed to forward these comments to the Grant Folder Analyst.

Action: (Chanath Ratnanather, Cathy Walker) Forward ePUG's suggestions for eRA Grant Folder to Grant Folder Analyst.

Strategy for Evaluating IC Extension Systems

Carlos explained that the ePUG needs to develop a strategy for evaluating and selecting existing IC-extension systems to incorporate into the Program Module (PGM).

The group agreed that the main criterion for evaluating appropriate IC-extension systems is whether or not the functionality of an IC-extension system is crucial to the overall business practices of Program Staff across the NIH. Carlos explained that the challenge is determining what functionality is crucial to each IC and what, of those features, would be useful to all ICs.

The group suggested the following strategy for evaluating IC-extension systems.

Research

- Present the Program Module demo to Program staff in each IC. After the initial presentation, ask audience members to discuss what functionality the PGM is missing that their current IC-extension system provides. Carlos suggested beginning with the NHLBI since Israel, Chanath, and himself are already scheduled to present a PGM demo this month.
- Research the business practices of Program staff in each IC.
- Ask Thor Feldstedt about his findings regarding the similarities and differences between existing IC-extension systems.

Analysis

- Map the similarities and differences between the business practices of Program staffs in each IC.
- Determine what features of IC-extension systems support business practice similarities across all Program staffs.
- Determine what features of IC-extension systems can be eliminated without damaging or severely interfering with the way Program staff in each IC conducts business. It is important not to remove a system upon which Program staff heavily relies.

Action: (Carlos Caban, Israel Lederhendler, Chanath Ratnanather) Ask the Program community during scheduled presentation at the NHLBI to evaluate the Program Module (PGM) in light of its current IC-extension system.

Action: (All) Schedule a presentation of the Program Module (PGM) with the Program staff of respective ICs; ask various Program communities to evaluate PGM in light of their current IC-extension systems.

Action: (Carlos Caban, Israel Lederhendler, Chanath Ratnanather) Develop a comprehensive research plan for gathering information about Program staff business practices across the NIH and about similarities/differences across all IC-extension systems.

Attendees

Armistead, Allyson (LTS)

Asanuma, Chiiko (NIMH)

Caban, Carlos (OER)

Duncan, Rory (NIAID)

Finkelstein, David (NIA)

Fisher, Richard (NEI)

Florance, Valerie (NLM)

Heath, Anne (NCI)

Lederhendler, Israel
(NIMH)

Martin, Carol (NHGRI)

Nichols, Paul (NINDS)

Ratnanather, Chanath
(OD)

Seranno, Jose (NIDDK)

Sorensen, Roger (NIAAA)

Walker, Cathy (OD)

Wehrle, Janna (NIGMS)