



## eRA Project Team Meeting Minutes

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**Date:** July 23, 2002  
**Time:** 9:00 a.m.–10:00 a.m.  
**Location:** 6700 B Rockledge, Room 1205  
**Chair:** John (JJ) McGowan

### Action Items

1. (Sara Silver) Prepare a proposal for change-of-institution business rules based on the current proposal and input from this meeting. Distribute it to the eRA Project Team.
2. (All) Send suggestions for Fall Retreat presentation topics and keynote speakers to Carla Flora.
3. (Carol Martin) Research feasibility of sending tech pages to the tech group for updating. Report back with a solution at the next eRA Project Team meeting.

### Deployment Update

*Tim Twomey*

Tim reported that the July deployment was a success yet not without some difficulties and complications. The maintenance tasks that were being performed by the Office of Information Technology (OIT) the same weekend were a difficulty from the outset. However, more than 50 maintenance and new development items were deployed successfully.

On Monday morning, there were several system problems to address but most were resolved by the end of the day. The Report server was a particular problem. Some of the problems are still being resolved.

Tim Twomey congratulated the Ops group and the entire team for this successful deployment.

### Persons Module Update

*JJ Maurer, Sara Silver*

Sara and JJ have been working on a plan for Role and Profile processing. In her presentation ([http://era.nih.gov/Docs/Role\\_Profile\\_Arch\\_07-23-02.ppt](http://era.nih.gov/Docs/Role_Profile_Arch_07-23-02.ppt)), Sara reviewed the current system, presented proposed business rules for Profiles and Roles, showed the Persons Module changes and noted the work that remains to be done. Sara also reviewed Single Point of Ownership because it is closely related to Role and Profile development. Attached to the presentation was a table ([http://era.nih.gov/Docs/Table\\_of\\_data\\_ownership.doc](http://era.nih.gov/Docs/Table_of_data_ownership.doc)) that delineated what information is owned by the external user and what can be changed or is provided by NIH internal application users.

In the proposed business rules, Profile information will be divided into NIH-owned and owner-maintained information (where the owner has registered through the Commons or Internet Assisted Review). The Profile will be updated by the most recently provided information and the Profile data will take precedence over all other data, except where the Role is maintained as a

point-in-time audit. Role information will be maintained as a subset of Profile information at a point in time.

The scope of the Persons Module will change as a result of these changes in the business rules for Profile and Role data. The necessary changes will be made when the Persons Module is moved to J2EE architecture, after the CM Fast Track release scheduled for December. Analysts also continue to investigate the impact these changes will have on other Forms applications.

Analysts are also looking at the continuing introduction of duplicate profiles to IMPAC II. As part of the ongoing QA person data cleanup, QRC is producing a monthly report from which analysis is done to identify and eliminate duplicate entries.

**Single Point of Ownership**—As of the July release, personal information for PIs who have created accounts in the Commons is locked down at the Profile level. The number of PI records that are affected will increase when Commons is released externally in late August. After the October release of the Internet Assisted Review module, reviewer information will be locked down, with a lockdown for federal staff taking effect in the March release. At this point, Roster, WRK, and mailing addresses and Expertise are not locked down.

There currently is no electronic notification to the PI when a change has been made to the Profile data by NIH staff. Sherry Zucker explained that PIs can enter only specific information and that is not changed by NIH staff. However, a few “inside” people *can* change Profile information in special circumstances. It is left to the staff person who made the changes to notify the PI, usually by email or phone. Tim Twomey agreed that there should be an official electronic notification to the PI when inside staff makes changes. Electronic notification can be part a future release.

## **Type 1 PI Change of Institution**

*Sara Silver*

As the system works today, grant numbers (and IPF numbers) are assigned to Type 1 applications when the application is received. If the applicant institution changes after the application is reviewed but before it is awarded, the application is assigned a new grant number, the old score information is copied to the new record, and the old record is deleted.

There is a proposal to change this business rule so that when the applicant institution changes before award, there would not be a new record created. The past institution name would be stored in the system and the application would be flagged to draw attention to the change. The grant number would remain the same. The group suggested that the IPF number be stored along with the institution name.

Another aspect of the process is that the original grant is scanned, but partial grants (reviewed but not yet awarded) with institutional changes are not scanned. The new institution has to resubmit the application. When the award is made, CSR only gets the new face page.

**Action: (Sara Silver) Prepare a proposal for change-of-institution business rules based on the current proposal and input from this meeting. Distribute it to the eRA Project Team.**

## **October Retreat**

*Carla Flora*

The eRA Project Team retreat is being planned for Thurs.–Fri., Oct. 10–11, at the Airlie Center in Warrenton, Va. Carla presented some suggestions for retreat topics and asked for further input from the group.

- JJ suggested a session about Knowledge Management because it is important for us to see what this powerful technology can do.
- Steve Hausman suggested having a speaker from Adobe Systems because they have so many futuristic technologies that we should be aware of.

**Action: (All) Send suggestions for Fall Retreat presentation topics and keynote speakers to Carla Flora.**

## **Announcements/Status Reports**

**eRA-NIH-HHS Alignment**—JJ and Wendy Baldwin are working together to be in alignment with Charlie Havekost regarding the eRA project and the government-wide e-grant initiative. Charlie is coming to the EPMC in September. JJ noted that Paul Markovitz currently is on detail working with Charlie, and that OER has added a full-time replacement for Paul.

**Loan Repayment Program**—There is no closure on the Loan Repayment Program as yet. JJ will speak with Dr. Yvonne Maddox to reach closure.

**Scanned Images**—Steve Hausman reported that, although the paper application is still the official record, there is an electronic management system project in progress that may change this. There is a pilot program that allows an electronic image to be the official record if a Grants Management official testifies and puts their electronic signature on the image. This would certainly reduce required storage space in the future. CIT has to provide a solution for this issue with a point-in-time approval. When the decision is made, the eRA project can incorporate it into its business rules and processes. JJ noted that, although it will probably happen in the future, we should be cautious about being the “first on the block.” In other words, don’t plan to throw away hard-copy applications any time soon.

**IRDB Listserv**—Carol Martin announced that there is a new listserv, initially populated by the tech group but open to everyone, for discussion and information-sharing about the IRDB. She encouraged all those who were interested to sign up and participate.

**TechView**—The technical documents available in TechView have to be gleaned from the CDR and other sources, analyzed for appropriateness of information, and posted to the Web. There are no resources to update these documents right now. The group suggested that, instead of one person providing the updates, the pages be sent out to the tech group for them to update.

**Action: (Carol Martin) Research feasibility of sending tech pages to the tech group for updating. Report back with a solution at the next eRA Project Team meeting.**

**Review Module Training**—Eileen Bradley reported that the series of four Review Module training sessions has been highly successful. More than 60 people have attended. Chuck Selden provided the funds to videotape the second session and also will tape the last two sessions. Each session focuses on a specific aspect of the Review Module. There will be a future offering of these sessions since the classes are overflowing and they are unable to accommodate all of those who would like to participate.

**UseIt**—Carol Martin announced a new version of UseIt that includes IPF changes from the OLTP and IRDB. There is a new PV\_POP\_TRACKING\_MV and future year dollars by CAN in PV\_AWARD\_BY\_CAN\_MV in the IRDB.

**SBIR**—There has been \$2.6M in SBIR awards. These are bringing new technologies in to help push data out.

## **Attendees**

Bradley, Eileen (CSR)

Caban, Carlos, (OER)

Carter, Dave (OER)

Christian, Vonnetta  
(LTS/OCO)

Collie, Krishna (RN  
Solutions)

Copeland Sewell, Zoe-  
Ann (OD/OER)

Cox, Michael (OER)

Fitzgerald, Steve (RN  
Solutions)

Fjellstedt, Thor (OD/OER)

Flora, Carla (OER)

Frahm, Donna (OER)

Geaney, Stefanie (SOZA)

Gibb, Scarlett (OER)

Grandy, Vanessa (Z-Tech)

Greenleaf, Andy (NGIT)

Hahn, Marcia  
(OER/OPERA)

Hann, Della (OD/OER)

Hausman, Steve (NIAMS)

Hodgkins, Earl (NIGMS)

Martin, Carol S (NHGRI)

Maurer, JJ (Ekagra)

McGowan, John (NIAID)

Moore, Bob (OD/OER)

Morton, Larry (OD/OER)

Morton, Pete (CIT)

Panniers, Richard (CSR)

Patel, Kalpesh (Ekagra)

Pearson, Johnnie (Z-Tech)

Seppala, Sandy  
(LTS/OCO)

Seto, Belinda (OER)

Siegert, Mark  
(OER/OPERA)

Silver, Sara (Z-Tech)

Silverman, Jay (NGIT)

Snouffer, Anna  
(OD/OFACP)

Spitzberg, Bobbi (OER)

Stuck, Jerry (OER/OD)

Tucker, Jim (OER)

Twomey, Tim (OD)

Van Brunt, Virginia (LTS)

Venegas, Amir (RN  
Solutions)

Zucker, Sherry (OD/DEIS)