IMPAC II GM Lead User's Group

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

Next Meeting: May 14, 9 a.m., 6001 Executive Blvd., Conference Room A1/A2

Actions Items

1. (All) Ensure that your IC is on board with the Grants Closeout system; email Mike Loewe for assistance.

2. (Mike Loewe, Cathy Walker): Meet to discuss the implementation of the GM Module edit checks for the October 2003 release.

3. (All) Remind your ICs that OFM is the receipt point for FSRs and that OFM needs to receive and accept FSRs before a grant is processed.

4. (All) Contact Marcia Hahn to participate in revising the IC specific customizable checklists scheduled for the July release.

5. (All) Email Pam Mayer if there are any difficulties loading the new variable sheet from the GM website.

6. (All) Fax Carolyn Stelle any changes or annotations to data items 2c and 2d on Type 5 face pages.

7. (Mike Loewe) Meet with Sara Silver to discuss possible enhancements to the PI Profile Update function in the GM Module.

8. (Mike Loewe) Include discussion of Workload Screen Fixes and the development of a new Spreadsheet to monitor IC workload on the May Agenda for the GM Lead Users Group.

9. (All) Update your ICs on the latest developments of the NIH eRA Commons and eSNAP by sharing Marcia Hahn and David Wright's power point presentation.

10. (All) Contact Mike Loewe to set up a Type 5 reminder e-mail system in your IC.

11. (All) Email Dave Chicchirichi any training demo ideas for the Grants Management section of the Virtual School.

Closeout Module Update

Mike Loewe announced that almost 12,000 records currently are stored in the Grants Closeout Module.

The March version of the Module has two new features: a never-funded list and an enhanced Institution report. The never-funded list, or report, allows the GM community to view a specific council round to identify never-funded applications. GM staff can track the shipment of never-funded applications to the Federal Records Center, pull files back to the IC if necessary, and enter a destruction date when appropriate. The enhanced Institution report allows GM staff to click on the grantee name and view a list of all of the grants present in the Closeout system. Previously, GM staff could only view grants from their respective ICs.

Mike emphasized the importance of using the Grants Closeout Module, especially since the information in the system will be available to the grantee via the NIH eRA Commons by the October 2003 release. It is essential that ICs regularly update their data in the Closeout Module so that grantees can view the correct information regarding their grants.

There will be a mandatory cut-off date by which every IC will be required to use the Closeout Module. This date has not been determined. Mike encouraged group members to "get on board" with the Grants Closeout Module now and to contact him directly for any assistance setting up or using the system.

Action: **(All) Ensure that your IC is on board with the Grants Closeout system; email Mike Loewe for assistance.**

Edit Checks Update

Debbie Hendry reported that the Edit Checks Working Group reviewed the edit checks document and made a few additional changes. The group is in the process of setting up a meeting with the developers to review these edit checks and discuss possibilities of entering them into the system. Mike explained that the edit checks most likely will be implemented in the October release; however, he plans to meet with Marcia Hahn to discuss this further. Mike congratulated the edit checks working group on their efforts. Their hard work will benefit the GM community as well as the GM Module redesign.

Action: **(Mike Loewe, Cathy Walker) Meet to discuss the implementation of GM Module edit checks for the October 2003 release.**

FSR Update

Dave Chicchirichi said that registration for the NIH eRA Commons continues at a brisk pace. Several smaller institutions are realizing that the system is open and are registering quickly. Dave asked the group to direct all questions about FSRs or registering with the NIH eRA Commons to the Helpdesk.

FSRs are still undergoing data conversion. When all FSRs have been successfully relocated to IMPAC II and the data conversion is complete, Dave will email the GM community. Until the

data conversion is finished, Marcia Hahn advised the group to check both IMPAC I and IMPAC II for FSRs before contacting grantees.

Mike reminded the group that a hard copy of an FSR does not mean that it has been reviewed and accepted by OFM. Mike asked the group to remind their respective ICs that OFM is the receipt point for FSRs and that OFM needs to receive and accept FSRs before a grant is processed.

Mike also explained that several GM staff members are misinterpreting the "yes" in the Closeout system as an indication that an FSR is needed. This is incorrect. The "yes" in the system indicates that an FSR has been accepted by OFM.

Finally, the group asked if it were possible to include all FSR documentation and correspondence in the FSR system or link them directly to the FSRs. Dave said that he would investigate the matter.

Action: **(All) Remind your ICs that OFM is the receipt point for FSRs and that OFM needs to receive and accept FSRs before a grant is processed.**

Action: **(Dave Chicirrichi) Investigate the possibility of including all FSR documentation and correspondence in the FSR system or linking them directly to FSRs.**

Foreign Components Module Update

There will be a limited pilot of the Foreign Components Module released in July. The Foreign Components Module Focus Group will be the first to participate in the pilot and test the creation of an 1820 in IMPAC II. Once the pilot has been tested, the focus group will present the results to the GM Lead Users group.

Customizable Checklists Update

Marcia Hahn explained that the Customizable Checklist Workgroup continues to develop a way for ICs to create an IC-specific checklist within IMPAC II. Right now, ICs have agreed that the checklist items in the upper right-hand corner of the Administration screen should become the standard checklist items. She explained that ICs will have the ability to put IC-specific checklist items on this checklist as well. A pilot of this single customizable checklist is scheduled for release in July. Program, Review, and Grants Management will use this checklist.

Marcia said that one of the challenges with the development of a customizable checklist is rewording the checklist items so that they are clear and up-to-date. She said that the group has decided to revise the checklist items for the October 2003 release. A workgroup will be established to address this revision. Marcia encouraged all group members interested in rewriting the checklist to contact her directly.

Action: **(All) Contact Marcia Hahn to participate in revising the IC specific customizable checklists scheduled for the July release.**

Standardized Spreadsheet Working Group

Pam Mayer explained that the glitches with the production version of the latest Standardized Spreadsheet have been fixed. She instructed group members using this production version to download the new variable sheet from the GM website. Group members should contact her directly if there are any problems loading the variable sheet.

Finally, Pam announced the release of a new Beta version. This version allows users to create additional salary lines. She will provide further details at the next GM Lead Users meeting.

Action: **(All) Email Pam Mayer if there any difficulties loading the new variable sheet from the GM website.**

Change Information on Type 5 Continuation Facepages

Marcia reminded the group to fax Carolyn Stelle any changes or annotations to data items 2c and 2d on the Type 5 facepages. Evidently, the facepages are causing some Data Quality problems because the system is not successfully receiving updates.

Action: (All) Fax Carolyn Stelle any changes or annotations to data items 2c and 2d on Type 5 facepages.

Changing/Editing Principal Investigator and Data Integrity

Mike suggested a way to reduce monthly errors involving PI Profile Updates. After editing PI data (addresses, degrees, etc.) and saving changes, GM users should select "no" when they are presented with the option of updating a Principal Investigator's (PI) profile. Mike explained that selecting "no" always guarantees that the PI profile is not tampered with, overwritten, or lost. The only time users should update a PI profile is when they are 100 percent certain what data the system is changing. However, because of the complexity of the system, it is difficult to be 100 percent accurate.

Mike emphasized the importance of GM specialists communicating regularly with their IC Data Quality personnel. An open line of communication will ensure that the Data Quality staff is aware of its responsibilities involving updates to the data. If Data Quality has any questions, they should contact the IMPAC II Helpdesk or Sara Silver, the analyst for Person Data.

The group suggested a series of enhancements to the PI Profile Change/Edit functionality. They agreed that the system should alert users or provide some kind of confirmation that a PI profile has been updated. Group members also recommended possibly eliminating the automatic profile update completely from the system. Marcia Hahn explained that removing this step would force users to consider if they need to update a profile on all their records and to edit a profile manually if the profile needs to be altered. Mike said that he would discuss these possible enhancements with Sara Silver. He will meet with the Analysts to discuss whether these enhancements are smart from the perspective of GM business practices.

Action: **(Mike Loewe) Meet with Sara Silver to discuss possible enhancements to the PI Profile Update function in the GM Module.**

Fellowship Issues

Marcia Hahn addressed several bugs with Type 1 fellowship grants.

Printouts—Printouts of the awards are still displaying the budget period rather than the latest activation date. To ensure that the latest activation date and not the budget period appears on the award, users need to delete the budget end date.

Displaying Budget Period—If an award displaying a budget period has already been issued, that award cannot be activated using the "activated button." Users faced with this problem need to

revise the award by removing the budget period as well. Mike encouraged group members to remind their respective ICs to refrain from entering a budget end date in Type 1 for the initial release of the award.

Workload Screen Fixes

Marcia Hahn reported problems with the Workload Screens. Last year, the GM community requested that competing grants flagged as "intent to pay" always say "intent to pay," even after awarded. Previously, the system only would indicate "intent to pay" until the competing grant was awarded; after that time, the "intent to pay" indicator was removed.

Consequently, after this change was implemented, all competing grants from last fiscal year were incorrectly displayed with "intent to pay." In an effort to fix this problem, all the competing grants were accidentally "dropped off," including those from the current fiscal year.

Marcia explained that a proposal to fix this problem has been submitted. Until this is fixed, Marcia advised group members to monitor their IC workload using the Excel spreadsheet that Pam has been developing. Pam said that the spreadsheet will most likely have to be altered to meet this need. Marcia proposed that the GM Lead Users work closely with Pam to create another version of the spreadsheet to monitor workload.

Action: **(Mike Loewe) Include discussion of Workload Screen fixes and the development of a new spreadsheet to monitor IC workload on the May Agenda for the GM Lead Users Group.**

eSNAP

Last week, Marcia and David Wright presented a PowerPoint presentation on eSNAP to the National Institute of Diabetes and Digestive and Kidney Diseases (NIDDK). The presentation demonstrated the forms and process that business officials at research organizations actually complete in NIH eRA Commons. Mike Loewe recommended that group members distribute this PowerPoint presentation to their respective ICs so that all GM staff can have the latest information on eSNAPS, NIH eRA Commons, and the electronic process that the PI community is required to complete.

Action: **(All) Update your ICs on the latest developments of the NIH eRA Commons and eSNAP by sharing Marcia Hahn and David Wright's PowerPoint presentation.**

Type 5 Reminder Emails

Mike reminded the group that his IC has developed an effective system for reminding grantees to send in their Type 5s. The system, consisting of public email folders and one generic account, has the capability of automatically sending grantees a reminder email, or a Link Type 5 Notice, two months before the Type 5 due date.

So far, more than a dozen ICs have contacted Mike about setting up this system. Interested parties should contact him for guidance and instruction.

Action: **(All) Contact Mike Loewe to set up a Type 5 reminder e-mail system in your IC.**

GCM, GM, ICO, and TA Training

Last month, the Electronic Consulting Subcommittee (ECS) hosted two training sessions for the GM community. The first session focused on the Grants Closeout Module and the second on GM, ICO, and Training Activities module tips and tricks. Both sessions were successful.

The tips and tricks session, in particular, was helpful because it highlighted a host of areas where additional training may be required. ECS plans to host a series of additional training sessions.

Virtual School

Dave Chicchirichi announced the development of a "Virtual School," an interactive learning tool dedicated to educating the—

- GM community and other business areas at the NIH on the IMPAC II system.

- business officials, Principal Investigators (PI), and others on the NIH eRA Commons system.

The Virtual School will feature hands-on training demos created in a new technology called RoboDemo, a program that can record and play back specific task sequences.

The Virtual School is an eRA Project. It first will focus on training the PI community to submit FSRs and then on training eRA business areas. Dave encouraged the group to email him any ideas about training demos for the GM community.

Action: **(All) Email Dave Chicchirichi training demo ideas for the Grants Management section of the Virtual School.**