



## IMPAC II GM Lead User's Group

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**Date:** August 13, 2003  
**Time:** 9:00–11:00 a.m.  
**Location:** 6001 Executive Building, Conference Room A1/A2  
**Advocate:** Michael Loewe

**Next Meeting:** October 8, 9 a.m., 6001 Executive Blvd., Conference Room A1/A2

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### Actions Items

1. (Carlos Caban) Send ePUG roster to Mike Loewe for distribution to Grants Management (GM) Lead Users.
2. (Mike Loewe) Distribute ePUG roster to Grants Management Lead Users.
3. (Carlos Caban, Mike Loewe) Coordinate meeting for Grants Management (GM) and Program Module Lead Users to discuss interaction between GM Module and Program Module.
4. (All) Ensure that Closeout personnel in your IC are aware of the new functionality in the Closeout Module and are using the Module to its fullest potential.
5. (All) Ensure that your IC is on board with the Grants Closeout system; email Mike Loewe for assistance.
6. (Mike Loewe) Ask Dan Hall whether the No-Cost Extension Module prohibits grantees from requesting an extension if a grant is marked To Be Paid; ensure that grants in the Module are checked against Pay Codes.

### Handouts

1. August Release Highlights ([http://era.nih.gov/Docs/GM\\_August\\_Release\\_2003.pdf](http://era.nih.gov/Docs/GM_August_Release_2003.pdf))
2. QVR Information

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### Program Module Demo

Program Module Advocates Carlos Caban and Israel Lederhendler and Analyst Chanath Ratnanather presented a demonstration of the Program Module recently released August 2003. Mike Loewe explained that the Program Module will be a helpful model for the redesign of the Grants Management Module. As the GM community moves away from an individual system to a system that is integrated with other eRA modules, it is important to understand how the GM module and the Program Module will interact in the future.

The Program Module is a Web-based eRA module for NIH Program staff that conducts both transactions and reports. The Program Module seeks to provide—

- Easy access to a Program Official's (PO) portfolio of individual grants and awards at sign-on
- Ability for POs to both conduct transactions and generate reports
- Ability for POs to locate information on a single grant and respond to immediate inquiries from PIs
- Distribution of PO's portfolio across the entire grant cycle (*Pending SRG, Pre Council, Post Council, Pending Type 5, Post Award, Other/Withdrawn*)
- Ability to conduct approvals/transactions using the On-Line Transaction Processing (OLTP) database for real-time data
- A user-friendly and intuitive interface
- Links to other eRA/NIH Modules

The portfolio features six pages, organized by the grant cycle: *Pending SRG, Pre Council, Post Council, Pending Type 5s, Post Award, and Other/Withdrawn*. A Program Official's portfolio is distributed across the grant cycle. For example, if a grant assigned to a PO is in the Post-Council stage, the PO will be able to view this grant and related information on the *Post-Council* page. Each page contains a hitlist of data relevant to each stage of the grant process, including dates, times, documents, and links to query tools and other modules in the eRA system.

The newest version of the Program Module was successfully deployed August 1. New features include—

- Search capability on PI Name and/or grant #
- Distribution of PO's portfolio into grant cycle pages, inclusion of filter/sort options, and ability to download hitlists into Excel
- Access to eRA Grant Folder, Grant Snapshot, Program Checklists, Program Approval sign off and sign-off notes, PO Notes, and historical notes
- Attention Flag column displaying concerns
- Option to include/exclude grants not assigned to PO
- Ability to save the PO Preferred Sort as the default
- Access to eRA Reports, including PO Worksheet, Master List of Applications, and SRG Agenda
- Option to expand/collapse sections of eRA Grant Snapshot
- Integration with new shared eRA modules (eRA Checklists and Grant Folder)

In the future, the Program Module will contain—

- ***An option to view another PO's complete portfolio.*** POs will have access to portfolios across all ICs at the NIH.
- ***Delegation and Organizational Layers.*** These layers will allow Program Assistants/Analysts to log in and view the portfolios of all the Program Directors they work for, allow branch or supervisory directors to view the portfolios of everyone who is

working in their section, and allow delegation to a limited number of users (as opposed to everyone) within an IC.

The GM Lead Users agreed that—

- The Program Module was a helpful model for the Grants Management Module redesign
- The *Pending Type 5s* page would be the most useful to the GM Module redesign
- The *Pending Type 5s* page needs to display whether an eSNAP has been received from the grantee. It would also be useful to feature a link to the eSNAP itself.
- The data featured on the PO Worksheet should be captured and stored in the IMPAC II system. This data would be useful in other modules. Chanath said that he would look into this matter further.
- The contents of the Grant Folder should be reanalyzed. The Grant Folder needs to contain a central set of information useful to all business areas at the NIH. Staff should not have to use four different tools to obtain information.
- More information could be included on the *Pre-Submission* page that would help Grant Management (GM) Specialists answer queries from grantees.

Carlos, Israel, and Chanath thanked the Lead Users for their input and encouraged them to visit the IMPAC II Web site to obtain additional information about the Program Module:

[http://impacii.nih.gov/applications/apps\\_pgm.cfm](http://impacii.nih.gov/applications/apps_pgm.cfm)

Carlos announced that the EPMC recently has elected Lead Users from each of the ICs to represent the Program Module. Carlos agreed to send this roster to Mike Loewe for distribution to the GM Lead Users.

Finally, Carlos strongly suggested that lead users of both the Program Module and the GM Module meet to—

- Discuss the interaction between the Program community and GM community
- Decide how this interaction should be configured into the designs of both the GM and PGM Modules

Carlos and Mike agreed to discuss future interactions between Program and GM Lead Users offline.

**Action: (Carlos Caban) Send roster of Program Module Lead Users to Mike Loewe for distribution to Grants Management (GM) Lead Users.**

**Action: (Mike Loewe) Distribute roster of Program Module Lead Users to Grants Management Lead Users.**

**Action: (Carlos Caban, Mike Loewe) Coordinate meeting for Grants Management (GM) and Program Module Lead Users to discuss integration of GM Module and Program Module.**

## August Release Highlights

Cathy Walker distributed a list of August release highlights and reminders: ([http://era.nih.gov/Docs/GM\\_August\\_Release\\_2003.pdf](http://era.nih.gov/Docs/GM_August_Release_2003.pdf)). For additional information about the release, visit the GM release notes posted on the IMPAC II Web site: [http://impacii.nih.gov/gmDoc/GM\\_RN\\_August2003\\_Update.pdf](http://impacii.nih.gov/gmDoc/GM_RN_August2003_Update.pdf)

## QVR Information

Mike Loewe distributed a handout with helpful links and information about the new enhancements to the QVR system. QVR features three new reports that will be useful to GM staff:

- **Training Grant Report**—displays number of slots awarded, filled.
- **Co-Funding Report**—displays co-funding commitments with other ICs, status of commitments.
- **End-of-the-Year Funding Report**

## Grant Closeout Module Update

The August release increased functionality in the Grant Closeout Module. Enhancements include—

- A dropdown list that allows users to sort on a variety of different fields. Users no longer have to navigate to different screens to perform different functions.
- Ability to enter a destruction date for a record. This date is sent to the record center.
- A Yes/No radio button for two different fields on the Edit page: *Program Official Received* and *Acceptable*. This information should eventually be integrated with the electronic progress report.

Mike asked group members to ensure that Closeout personnel are aware of this new functionality and are using the Module to its fullest potential.

Currently, approximately 24 ICs are using the Closeout Module. Mike reminded the group that there will be a mandatory cut-off date by which every IC will be required to use the Closeout Module. He encouraged group members to “get on board” with the system if they are not already. Information in the Closeout Module will be released to grantees via the NIH eRA Commons in January, so it is essential that ICs present updated data in the system so that grantees can view correct information regarding their grants.

Finally, Mike said that the group needs to start brainstorming about the future interaction between the Grants Management Module redesign and the Grants Closeout Module. This topic will also be discussed at the Grants Closeout Module Workgroup meeting.

**Action: (All) Ensure that Closeout personnel in your IC are aware of the new functionality in the Closeout Module and are using the Module to its fullest potential.**

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

## No-Cost Extensions

A No-Cost Extension Module will be released in October. Located in the NIH eRA Commons, this module will allow grantees to process one-time, no-cost extensions. Currently, grantees send letters requesting no-cost extensions, the NIH staff enters these requests in ICO, and grantees receive letters of confirmation. The No-Cost Extension Module will replace this process, saving time and effort for both grantees and NIH staff.

Grantees will access the No-Cost Extension Module through *Status* in the NIH eRA Commons. Grantees are presented with two options: a six-month or twelve-month extension. Once an option is selected, users click the “Confirmation” button and records in IMPAC II are automatically updated. Grantees receive confirmation that the extension has been granted and the Grants Management Specialist and Program Official are notified.

Mike Loewe emphasized that the No-Cost Extension Module is a big step for the eRA Project because it is the first time grantees will be able to update information in the system.

The group asked whether the Module will prohibit grantees from requesting an extension if a grant is marked *To Be Paid*. The group agreed that the Module should be able to check grants against Pay Codes. Mike Loewe will contact Dan Hall about this issue.

**Action: (Mike Loewe) Ask Dan Hall whether the No-Cost Extension Module prohibits grantees from requesting an extension if a grant is marked To Be Paid; ensure that grants in Module are checked against Pay Codes.**

## Just-in-Time Documents

A Just-In-Time user interface is scheduled for release in October. Located in the NIH eRA Commons, this module allows grantees to submit just-in-time documents (Pending Type 1s with a percentile of 30). Grantees will be able to upload Word and WordPerfect documents.

## Web QT

Currently, ten members of the Web QT Committee are participating in a pilot. Comments and feedback about the pilot are due at the end of August. Mike will update the group as he obtains additional information.

## Standardized Spreadsheets Update

A new production version of the standardized spreadsheet is available. Mike asked group members to ensure that their respective ICs are aware of this version and are able to download it successfully.

Recently, the Standardized Spreadsheet Working Group met with eRA. The Workgroup discovered that subproject dollar amounts can indeed be captured and imported into IMPAC II. This will save Grants Management time and effort.

Finally, Mike encouraged all ICs to use standardized spreadsheets. The benefits are immeasurable.