

Receipt and Referral User Group Meeting

Date: November 19, 2002
Time: 9:30 a.m.–11:00 a.m.
Location: Rockledge 2, Room 3014
Facilitator: Sara Silver
Next Meeting: TBD

Action Items

1. (Sara Silver) Schedule development for March for a checkbox for SBIRs with externally-funded Phase 1 on the Referral Data screen.
2. (Sara Silver) Send LRP specifications to Suzanne Fisher and Sylvia Dutcher for review.
3. (Sara Silver) Review the PHS 416 form to see if the data entry screen will need to be modified for March.
4. (Scarlett Gibb) Request that Score mailers be added to the Status Report.

October Release

The release items from the October deployment were discussed. Most items are functioning. The following table lists those items for which there was some comment.

Item	Comments
a. Table-driven Auto SRG assign functionality.	Waiting for list of autoassign parameters from Review.
c. On the Referral Data screen, when an amended application is changed to another IC, allow user to enter the suffix code.	This was not done. It is scheduled for the March release.
e. SBIR Phase 2, when Phase 1 was external to NIH.	Suzanne Fisher would like a checkbox for the SBIRs with externally-funded Phase 1 on the Referral Data screen. Action: (Sara Silver) Schedule development for March for a checkbox for SBIRs with externally-funded Phase 1 on the Referral Data screen.
p. To accommodate ROT notification, modify 901 processing so that 6-digit serial number can be processed.	Testing taking place. Should be done by Friday. Before review, ROTs are sent to DEA, SRA. After review, they are sent to DEA only.

March Release

The requirements scheduled to be released in March have been down-sized to mitigate risk associated with the upcoming database migration.

Item	Comments
a. User interface for setting IRG cluster codes.	<p>The best way to correct problems with reports is to have an interface allowing someone to enter the program and correct and maintain the IRG cluster codes. The best place to make these corrections is through the Committee Administration screen, which is available from both the Receipt and Referral module and the Committee Management module. In March, there will be a person in CM who will maintain the data.</p> <p>Starting in 2003, there will be a reorganized IRG structure in CSR. After the March release, the IRG cluster codes will be able to be set for the new structure.</p>
b. Analysis for modifying algorithm for Person search.	<p>QRC has recommended a change in the Person Search algorithm so that searches can be conducted on social security number and name together, not each separately. This will be analyzed for viability during this release cycle, and possibly implemented for the July release.</p>
c. Any additional items that need to be added to replace functionality for IMPAC I sunsetting.	<p>This is a “catchall” for anything that got missed in the last release.</p>
d. Meeting_appls records for IRGs (to work the same as Peer Review).	<p>This is transparent to the user. It is being done to synchronize processing between Peer Review and Receipt and Referral.</p>
e. Correct validation on PCC codes.	<p>No comment.</p>
f. On the Referral Data screen, when an amended application is changed to another IC, allow user to enter the suffix code.	<p>This October item was delayed to the March release.</p>

LRP Release

The LRP will be released with the January 10 deployment. Suzanne expressed a concern that the short timeframe for entry will make it difficult for DRR to enter all applications by February 1.

Action: (Sara Silver) Send LRP specifications to Suzanne Fisher and Sylvia Dutcher for review.

Other Issues

PHS 416—Required for April 5 deadline. Sara will review the form to see if modifications are necessary to the data entry screen for the March release.

Action: (Sara Silver) Review the PHS 416 form to see if the data entry screen will need to be modified for March.

901 Warning Messages—Suzanne suggested warning messages for 901s where there is a grant with a later support year. There needs to be analysis done to clarify the requirements on this issue first. This might be able to get scheduled for the March release.

Mailers—A process has been in place to confirm the delivery of assignment mailers to DRR. The process seems to be working well for the assignment mailers. There is, as yet, no process for confirmation that score mailers have actually been sent. With e-notification (currently scheduled for the July release), notification can be sent when the score mailers are generated. In the meantime, Scarlett will request that Score mailers be added to the Status Report.

Action: (Scarlett Gibb) Request that Score mailers be added to the Status Report.

Attendees

Charles, Vilanique (CSR)

Chen, Lisa (NGIT)

Dutcher, Sylvia (Mitretek)

Fisher, Suzanne (CSR)

Gibb, Scarlett (OD)

Panniers, Richard (CSR)

Roberts, Leah (CSR)

Seppala, Sandy

(LTS/OCO)

Silver, Sara (OD/OER)

Stanfield, Brent (CSR)