Workgroup on Extramural Training Systems (WETS)

Date: June 12, 2003
Time: 10:00 a.m.–Noon
Location: Rockledge 1, Room 3502
Advocates: Barbara Huffman, Rick Ikeda, (Dr. Walter Schaffer)

Next Meeting: July 10, 10 a.m.–Noon, Rockledge 1, Rm. 3502

Action Items

1. (Steve Fitzgerald) Consider enhancing the Payback Snapshot report to allow for the selection of multiple status codes.
2. (Steve Fitzgerald) Send an email regarding incorrect termination notices as soon as a solution is determined.
3. (Steve Fitzgerald) Enhance the ASCII version of the NRSA Appointment/Termination Resume report to print in PDF so that it can be printed in landscape format.
4. (Steve Fitzgerald) Determine why an error message appears when trying to print the NRSA Transfer report.
5. (Steve Fitzgerald) Convene a group of people to discuss the Stipend Amount discrepancy in the Award detail tables (IRDB Fellows) and decide what the specifications should look like.
6. (Steve Fitzgerald, Wally Shaffer, Rick Ikeda, Barbara Huffman, any other interested WETS members) Meet before the next WETS meeting to discuss the workflow for handling duplicate profiles.
7. (Elaine Sirkis, Rick Ikeda, Cathy Buckley) Work together to make minor training data enhancements to the QVR Reporting system.
8. (Marie Willet, Sara Stone, Carin Sprick, Marsha Hahn, Steve Fitzgerald, and Wally Shaffer) Meet to discuss the business rules for closing the T35 post docs.
9. (Steve, Marie, Lisa) Set up another meeting with OFM.

TA Reports

Most reports can be accessed on the Splash Screens. The following reports were discussed.

Payback Snapshot Report

Payback Snapshot report shows a listing of all individuals of an IC. Only one status code can be selected. This report can be sorted by grant number, name, and payback status. This report creates a report in PDF format.

Action: **(Steve Fitzgerald) Consider enhancing the Payback Snapshot report to allow for the selection of multiple status codes.**

Termination Notices

There are some problems with the Termination Notices report. When old Fellowship records were bridged from IMPAC I into the database, in some cases multiple term notices were created. Steve, Elaine, and Carin are close to coming up with an algorithm to resolve the problem. This problem also occurs when searching on the status code for "Termination Notice" in the Payback Snapshot Report.

Action: **(Steve Fitzgerald) Send an email regarding incorrect termination notices as soon as a solution is determined.**

NRSA Appointment/Termination Resume Report

The NRSA Appointment/Termination Resume report can be generated in either PDF or ASCII format. The PDF version produces a roster listing. The ASCII version includes budget information in addition to the roster listing. ASCII reports are not ideal for printing in landscape. In the discussion it was determined that it would not be a problem to provide the ASCII version of the report to print in PDF format so that it can be printed in landscape.

Action: **(Steve Fitzgerald) The ASCII version of the NRSA Appointment/Termination Resume report will be enhanced to print the report in PDF so that it can be printed in landscape format.**

NRSA Appointment/Termination Transfer Report

Steve had problems printing the NRSA Appointment/Termination Transfer Report. He kept getting an error message.

Action: **(Steve Fitzgerald) Determine why an error occurs when trying to print the NRSA Transfer report.**

Payback Snapshot Report

This report is available through the Payback Module. A search can be done on one individual only. The report period history can be retrieved from this report and the APAC status can be retrieved from this report.

There is a problem with this report. In most cases the stipend amount for fellowships are being overstated by the institution allowance. When the old fellowship data was loaded into the OLTP, there was a Stipend Amount column, which, in most cases, included the institution allowance. The problem is that when Steve compared the stipend total (total stipend amount + institution allowance) with the OLTP verses all stipend data in the IRDB, he found that sometimes the total amount, when subtracting the institution allowance, did not match. He said that that meant the stipend amount changed in the OLTP and didn't line up correctly. As a result of this, a discrepancy report is being done for other problems that may be encountered. Through research and comparison of the data, it was discovered that for most of the fellowships, a sweep of the data can be done to pull in the correct fellowship stipend amounts. There are about 37,000 records. This probably will be done in the next few weeks. Steve said that a group of people would have to come together to make a decision about the specifications. Steve didn't think it would be necessary to update all of the fellowships because a lot are older records and there hasn't been much activity.

Enhancements for TA are posted on the Web site. Modifications to existing reports should be easy to do. There will be minor enhancements in the July release. Any request for additional changes to go in the October release should be sent to Steve in the next 4 to 6 weeks.

Action: **(Steve Fitzgerald) Convene a group of people to discuss the Stipend Amount discrepancy in the Award detail tables (IRDB Fellows) and decide what the specifications should look like.**

X-Train Deployment

Although there is not final approval, it is possible that X-train will deploy in October. The requirements document is divided into use cases and each use case has a certain chunk of functionality. Hopefully at least two of the use cases will be implemented for the October deployment.

The primary issues of the Duplicate Profiles have been somewhat resolved. The new issue with Duplicate Profiles is when a person enters data and the "Prior Support" screen pops up, would the user know how to respond to the check marks? There was discussion as to whether a "Yes" and "No" box is sufficient, and would they understand not to check anything if they did not know the proper response. It was suggested that a "Don't Know' box should be provided also. There was also a suggestion that the NIH develop a step-by-step "How to" and send it to every person who is going to be put on the Trainee grant. Steve suggested that the WETS group be involved in developing such a procedure. He also said that a decision has to be made on how much burden should be put on the user to go through the workflow to identify prior support.

Steve suggested that an interim meeting be set up before the next WETS meeting in July because the requirements for the October release may be due soon. He wants to discuss the workflow for handling the duplicate profiles. Anyone who wants to be a part of this meeting is welcome to attend, but he especially wants Wally, Rick, and Barbara, to attend. Steve has a list of user's who want to participate in the redesign, and a pilot that will possibly resolve the duplicate files issue.

Action: **(Steve Fitzgerald, Wally Shaffer, Rick Ikeda, Barbara Huffman, any other interested WETS members) Meet before the next WETS meeting to discuss the workflow for handling duplicate profiles.**

Query/View//Reporting (QVR)

This is a Web-based application: **qvr.nih.gov.**
Rick Ikeda gave a presentation on how this reporting system works. The search can be done on all grants and applications. It is basically an information-gathering tool, and the purpose of this reporting system is to start users to think about what type of reports that would be useful. Barbara Huffman asked if totals can be accessed. Rick presented a spreadsheet that demonstrated acquiring totals. This reporting system is good for getting information on the training grants, especially for those who don't have access to the TA Module. This reporting system produces a standard report, which has enough information to get a summary. There is a tutorial available from the homepage.

Another query is being developed similar to QVR. This query will have more options in accessing reports. It will be pulling its data from OLTP, which only provides data for the last five years. The pilot will take place in July.

Action: (Elaine, Rick, and Cathy) Work together to make minor enhancements to the standard report.

Status on T35s

The primary issue with the T35s is that the post-docs need to be closed and business rules must be developed to make this happen. It was decided that it was not necessary to close the pre-docs that were put on after June 10, 1993 because they don't incur obligations. Prior to June 10, 1993, T35s of both pre-docs and post-docs should be closed. Steve said this issue can be addressed easily on the back end. Now, what has to be determined is how far beyond June 10, 1993, should the closing of T35s be processed—there has to be a cut-off date.

To discuss the details of the process, a sub committee of the WETS group was formed. The participants will be Marie Willet, Sara Stone, Carin Sprick, Marsha Hahn, Steve Fitzgerald, and Wally Shaffer. Anyone else desiring to be a part of this subcommittee is welcomed. Other issues that will be discussed at that meeting:

■ Open Termination Notices that should not be open.

■ Closing multiple Termination Notices when there should only be one.

Action: (Marie Willett, Sara Stone, Carin Sprick, Marsha Hahn, Steve Fitzgerald, Wally Shaffer) Meet to discuss the business rules for closing the T35 post-docs.

F31 Pre Docs

The application looking at degree information for the fellowships was incorrect. This has been taken care of and will be deployed in July.

OFM

Steve and Marie met with OFM a few months ago to discuss OFM using the TA module for some of their tracking. They discussed tracking and combining the service payback with the financial payback from a software point of view. OFM currently has access to the TA module. They want to establish other codes and data elements to assist in this tracking.

Action: (Steve, Marie, Lisa) Set up another meeting with OFM.

Update on Action Items from the Last Meeting

Action Item	Status
1. (Steve Fitzgerald) Present all reports currently in the Training Module at the next meeting.	Done. A presentation was done on two Payback Snapshot reports, Trainees/Fellows for Whom Termination Notices are Due, and the PDF and ASCII version of NRSA Appointment/Termination Resume.
2. (Rick Ikeda) Provide a demonstration of the QVR at the next meeting.	Done. A presentation was done on information gathering using QVR

Action Item	Status
3. (Steve Fitzgerald) Convene a meeting with Mike Cox, Elaine Sirkis, and Carin Sprick to determine the best strategy for how to close inactive T35s	Not done. A subcommittee was formed to discuss the issues of the T35s. They will meet before the next WETS meeting.

Attendees

Chen, Lisa (NGHIT)

Dellose, Jim (NCI/ISCS)

Dingle, Linda (NEI)

Fitzgerald, Steve (RN Solutions)

Huffman, Barbara (NIAID)

Ikeda, Richard (NIGMS)

Knipple, Joy (NIMH)

Linde, Emily (NHGRI)

LoMonico, Anita (NCI/ISCS)

McHale, Carolyn (CIT)

Shingler, Felicia (OD)

Sirkis, Elaine (NCI)

Sprick, Carin (DEIS)

Stone, Sara (NIDCD)

Vann, Cecelia (OD)

Willett, Marie (OER/OD)