eRA Program Official Users Group (ePUG)

Date: August 13, 2003
Time: 1:00–3:00 p.m.
Location: Rockledge 2, Room 9112
Advocates: Carlos Caban, Israel Lederhendler

Next Meeting: Program Module Training Session, September 10, 1–3 p.m. Location TBA

Actions Items

1. (Chanath Ratnanather) Compile and distribute list of Program Module bugs to ePUG.

2. (All) Email Program Module bugs and glitches (not included on the list) to Carlos Caban.

3. (Lead Users) Use the Program Module and become familiar with its features.

4. (Lead Users) Organize Program Module training for respective ICs; contact Carlos Caban for assistance and suggestions.

5. (All) Send Carlos Caban location suggestions for the Program Module Training session scheduled for the September 10 ePUG meeting.

6. (Carlos Caban) Coordinate a Program Module training session for September ePUG meeting.

Handouts

- ePUG Agenda and Program: http://era.nih.gov/Docs/e-PUG-2_Presentation_08-13-03.pdf

Announcements

*Welcome and Introductions—*Carlos Caban welcomed all ePUG members, Program Analysts/Assistants, and newly appointed Program Module (PGM) Lead Users. A roundtable of introductions ensued.

*Program Module Lead Users—*Currently, EPMC representatives from only 11 of the ICs have designated PGM Lead Users. Carlos reminded the group that lead users are crucial to the successful establishment of the Program Module within each IC. Lead users represent the Program Module to their respective ICs, assist with training and installation, and provide helpful insights to ePUG about the benefits of current IC extension systems. Carlos hopes to establish representatives from all 28 ICs.

Review of Program Module Goals

Carlos reviewed the purpose and goals of the Program Module for the benefit of new ePUG members (see *Slides 3–4*). The Program Module is a Web-based eRA module for Program

staff that conducts both transactions and reports. The basic design goals of the Program Module include—

- Easy access to a Program Official's (PO) portfolio of grants and awards at sign-on
- Ability for POs to conduct transactions and generate reports
- Ability for POs to locate information on a single grant and respond to immediate inquiries
- Distribution of PO's portfolio across the entire grant cycle
- 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

Program Module Update/Status

The newest version of the Program Module was successfully deployed August 1. New features include (see *Slides 5–6*)—

- Search capability on PI Name and/or grant number
- 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)

Carlos explained that a number of bugs have already been reported. Chanath Ratnanather volunteered to compile and distribute a list of these bugs to ePUG via email. This will ensure that the same bugs will not be reported twice. Carlos encouraged the group to report additional problems not included on this list.

Training slides and release notes for the August 2003 version of the Program Module are available on the IMPAC II Web site:

http://impacii.nih.gov/applications/apps_pgm.cfm

Finally, Chanath announced that the Program Module version released in October 2003 will contain—

- An option to view another PO's complete portfolio. PO's 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.

Action: **(Chanath Ratnanather) Compile and distribute list of Program Module bugs to ePUG.**

Action: **(All) Email Program Module bugs and glitches (not included on the list) to Carlos Caban.**

Future Program Module Priorities

Carlos asked the group to brainstorm about additional requirements for the Program Module. The group suggested the following:

- Include Annotated list of URLs that are publicly available.

- Feature human-subject information.

- Display data on how much money was spent in a particular area of science within an IC and across the NIH. This information would be helpful when reporting budget figures to Program Directors.

- Integrate the Program Module with the Budget Module and Grants Management (GM) Module.

- Integrate the Program Module with the Population Tracking Module. The group suggested including Population Tracking data in the Grant Folder.

- Provide one place for POs to access a list of grants going to study sections. Currently, users have to go to three different places.

- Include conference grants and related co-funding information. The group felt that it would also be helpful to locate the name of Program Directors associated with conference grants.

- Provide a variety of search capabilities (e.g., word, terms, subject areas, scientific coding).

- Feature links to form letters that are distributed to PIs at different stages of the grant process. Group members also thought it would be helpful if POs received an e-notification indicating when form letters have been sent to PIs.

- Offer e-notification of summary statements, etc.

- Include percent-effort column in hitlist. The group recommended coordinating this with the Grants Management (GM) Module.

- Provide an international component with information on foreign grants.

- Provide early notification of initiative development.

- Display Pay List.

- Feature an option to paste live links to relevant scientific publications in progress reports.

- Display information that is trans-NIH. Group members expressed a strong interest in viewing grants across the NIH that are working on the same research topic. It also would be helpful to feature real-time links to ongoing research at the NIH, possibly a bulletin board for trans-NIH issues.

- Include feature that keeps track of personnel/training involving Human Subjects.

- Present an overview screen or summary screen when POs log in to the Program Module. This screen would display information specific to the particular PO portfolio (e.g., how many grants are in the Pre-Council stage, how many grants need to be signed-off, etc.). Group members also suggested including a Closeout summary.

- Provide access to RFA boilerplate document and resources.

- Incorporate ARAs, referral activity, 901s.

- Investigate how administrative or non-competing supplements are entered into the system.

- Include feature that monitors workshops, development of workshops, initiatives.

- Provide option to download complete portfolio.

- Include IMPAC II Helpdesk link on every screen.

- Reconsider grant folder contents. Group members agreed that the information needs of POs are not necessarily met by the contents of the current Grant Folder.

- Include link to PI history.

- Provide users the option to customize main menu tabs.

- Consider incorporating R-15s—a "tickler" for annual reports.

Finally, Carlos asked the group to brainstorm about additional requirements for the *Pre-Submission, Resources, and Pre-review* screens. The group suggested the following requirements.

Pre-Submission

- Feature letters of intent and templates

Resources

- Feature library downloadables, applications, sample applications

Pre-Review

- Feature referral e-guidelines for Institute and Review

- Include subset of all applications in QVR

- Add terms to conduct customized searches—NIH consultant

- Investigate how PIs will handle their portfolios in the NIH eRA Commons

Training Needs/Approach

Carlos asked the group to consider the best approach to Program Module training. The group suggested the following:

- Conduct hands-on training classes for ICs. The group agreed that holding a class for one IC at a time was incredibly effective. This way, ICs can ask IC-specific questions.

- Feature a training demo via Web-cast. The group agreed that this method of training would work effectively as long as screenshots were used.

- Audiotape training session.

- Videotape training demo.

- Create CD-ROM.

- Deliver PowerPoint presentation to ICs.

- Publish Quick Tips (cheat sheets) and Frequently Asked Questions.

- Create Robo-Demo tutorial—an animated training demo. Currently, the eRA Communications and Outreach Branch is building tutorials for a number of eRA System modules. These tutorials will be housed in the eRA Virtual School, which is a Web site accessible via the eRA Homepage. For more information, contact Patty Austin, eRA Communications and Outreach Branch.

Carlos said that the role of PGM lead users will be to master the Program Module and then to instruct other Program staff to use it as well. He asked lead users to try out the module and coordinate a training plan for their respective ICs. ePUG is available to conduct training sessions if needed.

Finally, the lead users agreed that the next ePUG meeting should be used as a Program Module training session. Carlos agreed and asked the group to send him suggestions for locations. He will coordinate the session.

Action: **(Lead Users) Use the Program Module and become familiar with its features.**

Action: **(Lead Users) Organize Program Module training for respective ICs; contact Carlos Caban for assistance and suggestions.**

Action: **(All) Send Carlos Caban location suggestions for the Program Module Training session scheduled for the September 10 ePUG meeting.**

Action: **(Carlos Caban) Coordinate a Program Module training session for the September 10 ePUG meeting.**

Attendees

Armistead, Allyson (LTS)	Greenfield, Teri (NIAID)	Ratnanather, Chanath (OD)
Asanuma, Chiiko (NIMH)	Heath, Anne (NCI)	Sorensen, Roger (NIAAA)
Bartlet, Ginny (NIMH)	Lederhendler, Israel (NIMH)	Spinella, Giovanna (ORD/OD)
Burns, Amy (LTS)	McDermott, Julie (NIDDK)	Swain, Amy (NCRR)
Caban, Carlos (OER)	Miller, Roger (NIDCD)	Wehrle, Janna (NIGMS)
Duncan, Rory (NIAID)	Mullins, Christopher (NIDDK)	Whalin, Michael (NICHD)
Finkelstein, David (NIA)	Musson, Bob (NHLBI)	Wong, Shan (NCCA)
George, Janet (NHLBI)	Nichols, Paul (NINDS)	
Goodman, Stephen (NHLBI)	O'Neill, Blanche (NIAID)	