eRA Program Official Users Group (ePUG)

Date: March 10, 2004, Wednesday
Time: 1:00–3:00 p.m.
Location: Rockledge 2, Room 9100
Advocates: Carlos Caban, Janna Wehrle

Next Meeting: Wednesday, April 14, Rockledge 2, Room 9100

Actions Items

1. (Chanath Ratnanather) Investigate possibility of incorporating a link to Microsoft Word in the Sign-off Notes box featured in the Type 5 Program Official (PO) Checklist; update group at next ePUG meeting.

2. (All) Email Chanath, Carlos, and Janna any Program Official Checklists your respective ICs use for R01s.

3. (Janna Wehrle, Chanath Ratnanather, Carlos Caban) Review Program Official Checklists for R01s submitted by group members; develop a standard set of questions for Type 1 and Type 2 Checklists.

4. (Chanath Ratnanather) Review comments on the Portfolio-At-A-Glance page and create a new prototype for presentation at the next ePUG meeting.

5. (Chanath Ratnanather) Find out why the Program Module displays an empty space for unscored applications; consider another way to indicate applications that were unscored by the study section.

Handouts

1. Maintenance Release Items

2. Award Worksheet
   http://erawebdev.od.nih.gov/UI/CustomizableChecklist/checklistReport.asp

3. Portfolio-At-A-Glance prototype
   http://erawebdev.od.nih.gov/ui/ProgramModule/new/atAGlance.asp

Updates

*New ePUG Advocate—*Carlos Caban announced that Janna Wehrle will be taking the place of Israel Lederhendler as the new Program Co-Advocate. Carlos reminded the group that Israel is now the interim Project Manager for the entire eRA Project.

*eRA Project Team Update—*Carlos shared various highlights of the last few eRA Project Team meetings. He explained that the requirements for an Electronic ARA-901 system are almost finalized, that the pilot for the Type 5 Customizable Checklist is still underway, and that the Project Team is preparing for the MEO by encouraging ICs to streamline their

business processes and eliminate paper where necessary; scanning of all type 5 progress reports upon receipt is under consideration.

*Program Module Lead Developer—*Chanath Ratnanather introduced Alex Efendiev, the lead developer of the Program Module. Chanath said that he plans to invite PGM developers to future ePUG meetings so that they can have a better understanding of problems, needed enhancements, and overall concerns when developing the Program Module.

*Helpdesk Process—*Group members should direct any questions about or problems with the Program Module to the IMPAC II Helpdesk, not to the Program Advocates or Analyst. Problems reported to the Helpdesk will be forwarded to Cathy Walker (Mark Siegert will be the new government analyst as of March 18, 2004) and then to Carlos, Chanath, or Janna for response. This procedure needs to be upheld by all group members.

PGM Maintenance Release Items

Chanath distributed a list of maintenance items that will be released on or shortly after March 21, 2004. The group approved all of the items except the enhancement to combine the Attention and Problem Flags into a single flag character. The group felt that multiple characters should be used to distinguish particular concerns, features, or problems with the grant (i.e., "A" for Aids Related), not just a single, ambiguous flag character. Janna said that it would also be helpful if users could click on the character (i.e., "A" for Aids Related) and have the system transport users to the actual work process where the problem indicated by the character could be resolved. When the problem has been remedied, the flag or representative character should disappear. The group felt that this feature would be most helpful before Award so Grants Management could visibly see what needs to be taken care of before a Notice of Grant Award could be issued.

Chanath thanked the group members for their comments, but said that he will not be able to implement these changes in the upcoming release; it is too risky at this point to change maintenance items so close to the deployment date. However, Chanath reminded the group that maintenance releases will be more frequent this year, so changes recommended by the group can be implemented sooner than they have been in past years.

Award Worksheet

Chanath distributed a prototype of the Award Worksheet, a new concept developed by the Checklist Workgroup: http://erawebdev.od.nih.gov/UI/CustomizableChecklist/checklistReport.asp). The Award Worksheet is a report that combines the Program Official Worksheet, the GM Worksheet, and the Checklist report, providing users the option of viewing all information in these documents simultaneously rather than viewing and printing them separately. The Checklist Workgroup envisions the Award Worksheet being stored in the electronic Grant Folder, so that anyone can access it at anytime.

Chanath asked the group to review the Award Worksheet and provide any feedback. The group agreed that the Award Worksheet would be very helpful so long as it remained an option to users and not a mandatory view. Group members made the following comments:

- Consider changing the name of the report to "Draft Award Worksheet" or "Award Report." Richard Fischer said that the document is a report, not a worksheet, and should be titled appropriately.

- Include the Child Code.

- Change "Release Date" to "NGA Release Date."

- Change "Track Code" to "Pop-Tracking Code."

- Find out what "Current Issue Date" refers to. The group seemed confused by this term.

- Include consistent header and footer on first and second pages.

- Generate the Award Worksheet after the Notice of Grant Award (NGA) is submitted.

- Give Grants Management the responsibility for generating the Award Worksheet but provide access to Program staff.

The group also provided suggestions for the Program Checklist and all Checklists in general:

- Include link to Microsoft Word inside Sign-off Notes. Group members felt that they should be able to compose their sign-off notes in Word without having to close the Program Module. Chanath said that he would look into the matter further.

Action: **(Chanath Ratnanather) Investigate possibility of incorporating a link to Microsoft Word in the Sign-off Notes box featured in the Type 5 Program Official (PO) Checklist; update group at next ePUG meeting.**

Type 1, Type 2 Checklists

Carlos asked the group to decide what standard questions on the Type 5 Program Official (PO) Checklist would be appropriate for Type 1 and Type 2 Checklists. The group reviewed the questions and decided the following should be included for Type 1s and 2s:

- Is there evidence of scientific overlap? (if yes, explain)

- Has the gender/minority information been provided?

- For clinical trials, is there an acceptable plan for data and safety monitoring?

- Are there concerns regarding animal care and use? (if yes, explain)

- Are there other issues that should be resolved prior to issuing an award (if yes, explain).

Carlos asked group members to email Janna, Chanath, and himself the PO Checklists their respective ICs use for R01s. The questions on these various Checklists may prove useful to the creation of standard questions for Type 1 and 2 Checklists.

Action: **(All) Email Chanath, Carlos, and Janna any Program Official Checklists your respective ICs use for R01s.**

Action: **(Janna Wehrle, Chanath Ratnanather, Carlos Caban) Review Program Official Checklists for R01s submitted by group members; develop a standard set of questions for Type 1 and Type 2 Checklists.**

Portfolio-At-A-Glance Page

Chanath presented the group with a prototype for the Portfolio-At-A-Glance page, a summary page highlighting the contents of a Program Official's portfolio: **http://erawebdev.od.nih.gov/ui/ProgramModule/new/atAGlance.asp**. The page was first suggested several months ago by Chiiko Asanuma who felt that the first page of the Program Module should be an overview of a Program Official's grants and their current position in the grant process (Pending SRG, Pending Type 5s, etc.). Chanath asked the group to review the prototype and provide feedback. Overall, group members liked the prototype; however, they agreed that the page would not be very useful without hyperlinks.

The group felt that users should be able to link directly to various components of the boxes (i.e., No. of Meetings This Month should link to a list of meetings) or to corresponding pages in the Program Module. Chanath said that providing links on the summary page would be a huge cost and require months of development time. He advised the group to consider whether they want to invest their time, money, and effort in creating an interactive summary page or in fleshing out and improving the current Program Module. The group also provided additional suggestions:

- Provide users the option to select Council Round in the My Pre-Council box. Several of the counts/totals currently displayed are not very useful unless they are limited by Council Round. The group also suggested providing users two columns, one listing the counts for the upcoming Council Round and the other listing total counts for all Council Rounds.

- Add Counts/Total by Activity Code.

- Add Counts/Total for grants with Animal/Human Subject concerns.

- Show upcoming meetings for the next 30 days and the next 60 days in the My Pending SRG box. The group also recommended implementing a scrolling feature, so that users could view their entire list of meetings without distorting the size of the My Pending SRG box.

- Add Search mechanism.

- Consider implementing the Virtual Organizational and Delegation Layers into the Portfolio-At-A-Glance page so that Branch Chiefs can view an executive summary of the grants assigned to their employees.

Finally, the group agreed that the Portfolio-At-A-Glance page would be a real selling point when marketing the Program Module to the Program community. Chanath said that he plans to review the comments provided by group members and intends to create another prototype of the page for presentation at the next ePUG meeting.

Action: **(Chanath Ratnanather) Review comments on the Portfolio-At-A-Glance page and create a new prototype for presentation at the next ePUG meeting.**

Additional PGM Comments

Group members provided a few additional suggestions for the Program Module:

- Include Search feature on each page in the Portfolio.

- Find a less confusing way to indicate an application that has not been scored. Currently, the database indicates an unscored application with an empty space. It may be more helpful to actually enter "NS." This may be less confusing. Chanath agreed to look in the matter. Carlos mentioned that this is an OER review policy issue, including what is displayed on the summary statement face page, and agreed to investigate the issue further.

Action: **(Chanath Ratnanather) Find out why the Program Module displays an empty space for unscored applications; consider another way to indicate applications that were unscored by the study section.**

Attendees

Armistead, Allyson (LTS)

Asanuma, Chiiko (NIMH)

Bartlett, Virginia (NIMH)

Bean, Carol (NCRR)

Caban, Carlos (OER)

Chen, Doafen (NINDS)

Duncan, Rory (NIAID)

Efendiev, Alex (OER)

Finkelstein, David (NIA)

Fisher, Richard (NEI)

Florance, Valerie (NLM)

George, Janet (NHLBI)

Heath, Anne (NCI)

Hilton, Tom (NIDA)

Miller, Roger (NIDCD)

Prince, Mary Lou (NIMH)

Ratnanather, Chanath (OD/eRA)

Sorensen, Roger (NIAAA)

Wehrle, Janna (NIGMS)

Whalin, Michael (NICHD)

Wong, Shen (NCCAM)