Ev Sinnett's Focus Group Requirements

Version 4.0

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Prepared For:

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REVISION HISTORY

Date	Version	Description of Change	Author
12/14/01	1.0	Initial Meeting Notes	C Blizard
1/14/02	2.0	Updated from 1/9/02 meeting	C Blizard
1/17/02	3.0	Updated from 1/16/02 meeting	C Blizard
1/23/02	4.0	Updated from 1/23/02 meeting	C Blizard

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1. Overview

The CMUG has planned several requirements meetings to clarify the requirements for the Committee Management redesign.   This document lists the requirements that were discussed at the December 12, 2001 (1pm – 4:30pm), January 9, 2002 (1pm – 4pm), January 16, 2002 (1pm – 4pm) and January 23, 2002 (1pm – 4:45pm) meetings.   The meetings were held in Rockledge II, Room 7111.

The requirements came from a Focus Group organized by Dr. Ev Sinnett.

2. Overall Screen Requirements

2.1   Audit Trails

Details buttons should be changed to Audit Trails (not just most recent change). Problems reported with changes in Person Role records, including phone, fax, and e-mail, appearing seemingly at random, sometimes just after meeting being run. Can only guess that this is related to the need for cluster security without more documentation from an audit trail. This requirement is item #3 on the spreadsheet. This item was discussed at the 12/12/01 meeting.

Resolution:

- *Audit Trails will be in the redesign. The CMUG will review the proposed screen designs and will indicate what fields to track.*

2.2   Amount of data available on a screen at one time

The Meeting Roster window (and many others) should be bigger. This requirement is item #6 and #11 on the spreadsheet. This item was discussed at the 12/12/01 meeting.

Resolution:

- *The CMUG will review proposed screen designs at future CMUG meetings.*

2.3   Scrolling Functionality

Better scrolling functions. If you drag the scroll box to the bottom of the scroll bar, it only moves the pointer about 4 records. Bigger windows would help. Real time scrolling (with window moving as you scroll) preferred. This requirement is item #7 on the spreadsheet. This item was discussed at the 12/12/01 meeting.

Resolution:

- *The CMUG will review proposed screen designs at future CMUG meetings.*

2.4   Spell Check

Add spell check feature to all screens that require free form text entry. Entire screen should spell check. This requirement is item #8 on the spreadsheet. This item was discussed at the 12/12/01 meeting.

Comment:

- *Too many scientific names to spell check. Too many people names that will also be spell checked.*

Resolution:

- *Colleen will research. A possibility is allowing spell checking on user selected fields.*

2.5   Naming of Buttons

Better naming of buttons - may be getting too far into design, but worth putting forward. I'm thinking more like, "Person Search - Profiles" and "Person Search - Role Data." This requirement is item #10 on the spreadsheet. This item was discussed at the 12/12/01 meeting.

Resolution:

- *This issue will be resolved in the redesign.*

2.6   Pop-Up Help

Add Pop-Up Help. This requirement is item #13 on the spreadsheet. This item was discussed at the 12/12/01 meeting.

Resolution:

- *Include Pop-Up help on the screens.*

2.7   CM / Peer Review Integration

Items #1 and #2 below are discussed with a single resolution. These items were discussed at the 12/12/01 meeting.

1. Button to take you to Review Module. This requirement is item #13 on the spreadsheet.

2. Move/Share the Roster creation process into the Review module. This requirement is item #31 on the spreadsheet.

Resolution:

- *The Meeting Data Screen will be a shared screen between CM and Review.*

- *All for a button that will bring up the Review Splash screen in CM and a button in Review that will bring up the CM Splash Screen.*

3. A shared "Meeting Information" screen (accessible from CM, REV, and ICO) to allow quick access (view only?) of Roster, Agenda, Master List of Applications, Hotel information, scores, & percentiles (do other items come to mind?). When REV gets a Streamlining module, that pre-meeting information should be accessible, too. This requirement is item #146 on the spreadsheet. This item was discussed at the 12/12/01 meeting.

Statements:

- *Possibly display a calendar listing the events for a particular month with hyperlinks to the details of the meeting.*

Resolution:

- *Colleen Blizard will talk to Michael Martin regarding ICO.*

- *Kate Whelan will co-ordinate with Colleen Blizard in regards to the NIMH IMPACII query.*

- *We will provide a quick access meeting information screen. Further discussion will be required.*

Follow-Up on 1/9/02:

1. *Colleen confirmed with Michael Martin that ICO will have an interest in this data.*

2. *Kate Whelan provided screen shots of the NIMH query to Colleen. The screen shots are as follows.*

"200205" Council MH Application IRG Assignments   https://intranet.nimh.nih.gov/ncb/assign_Prog.cfm?RequestTimeout=500

IRG Assignments for the 263
"200205" Council MH Applications

Note: Due to the nature of review meetings and unexpected changes in people's schedules that inevitably occur for almost every big meeting, the (Order of Review) number shown below can change last minute and/or may not be entered until a few days before the meeting.

IRG Recommendation Codes: 1 Approved, 2 NRFC, 3 Deferred, 4 Pending Final Action,
5 Competitive Triage Further Review, 6 Non-competitive Triage Not Considered

CSR Study Section & SEP information   Other NIH Committees

ZMH1-CRB-B-01
[Meeting Roster]
18 Applications
being reviewed

(Unordered) PAR01-090	CALABRESE, JOSEPH 1P20MH066054-01	BIPOLAR DISORDER ACROSS THE LIFE SPAN (AT-SO), UNIVERSITY HOSPITALS OF CLEVELAND
(Unordered) PAR01-089	CRITS-CHRISTOPH, PAUL 1P30MH066169-01	ACISR:PSYCHOTHERAPY IN THE COMMUNITY (AT-AS), UNIVERSITY OF PENNSYLVANIA
(Unordered) PAR01-089	JESTE, DILIP 1P30MH066248-01	CENTER FOR RESEARCH IN OLDER PEOPLE WITH PSYCHOSES (AT-GP), UNIVERSITY OF CALIFORNIA SAN DIEGO
(Unordered) PAR01-089	KATZ, IRA 1P30MH066270-01	DEPRESSION AND MEDICAL CARE:AGING AND CLINICAL SETTING (AT-GP), UNIVERSITY OF PENNSYLVANIA

ZMH1-CRB-B-02
[Meeting Roster]
5 Applications
being reviewed

meeting has been set up →

Henry Haigler, SRA
National Institute of Mental Health Special Emphasis Panel
03/05/2002 - 03/05/2002, 0830 AM - 0500 PM
Neuroscience Center
National Institutes of Health
6001 Executive Blvd.
Bethesda MD 20892

(Unordered) PAR01-090	ABIKOFF, HOWARD 1P20MH066272-01	Developing Center for Intervention Research in DBD Youth (CT-CT), NEW YORK UNIVERSITY SCHOOL OF MEDICINE
(Unordered) PAR01-089	BRENT, DAVID 1P30MH066371-01	ACISR - Early-Onset Mood & Anxiety Disorder (CT-CT), UNIVERSITY OF PITTSBURGH AT PITTSBURGH
(Unordered) PAR01-089	IALONGO, NICHOLAS 1P30MH066247-01	CENTER FOR PREVENTION & EARLY INTERVENTION (CT-P), JOHNS HOPKINS UNIVERSITY
(Unordered) PAR01-089	MARCH, JOHN 1P30MH066386-01	Child and Adolescent Psychiatry Trials Network (CAPTN) (CT), DUKE UNIVERSITY
(Unordered) PAR01-090	RIDDLE, MARK 1P20MH066007-01	DCIR for Child & Adolescent Mental Disorders (CT-CT), JOHNS HOPKINS UNIVERSITY

ZMH1-CRB-B-03
[Meeting Roster]
1 Applications
being reviewed

application has been assigned

| (Unordered) | ESSOCK, SUSAN
3R01MH059312-01S1 | Effectiveness of Switching: Conventionals to Atypicals (AT-SP), MOUNT SINAI SCHOOL OF MEDICINE OF NYU |

ZMH1-CRB-B-04
[Meeting Roster]
1 Applications
being reviewed

| (Unordered) | RYAN, NEAL
2P01MH041712-16A1 | Neurobehavioral Changes in Pediatric Affective Disorder (DP-D), UNIVERSITY OF PITTSBURGH AT PITTSBURGH |

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ZMH1-CRB-C-01
[Meeting Roster]
6 Applications
being reviewed

(Unordered) PAR01-090	GANJU, VIJAY 1P20MH065934-01	National Research Center on Evidence-Based Practices (SE), NATIONAL ASSN OF STATE MH PROGRAM DIRS
(Unordered) PAR01-089	HENGGELER, SCOTT 1P30MH066010-01	Southeastern Effectiveness and Dissemination Studies (SE), MEDICAL UNIVERSITY OF SOUTH CAROLINA
(Unordered) PAR01-090	MUESER, KIM 1P20MH066295-01	Center for Developing EBPs for SMI (SE), DARTMOUTH COLLEGE
(Unordered) PAR01-090	REGIER, DARREL 1P20MH066125-01	Center for Study of SMI Treatment Guideline Adherence (SE), AMER PSYCHIA INST FOR RES & EDUC
(Unordered) PAR01-090	ROESSLER, RICHARD 1P20MH065936-01	Developing Centers for Intervention & Services Research (SE), UNIVERSITY OF ARKANSAS AT FAYETTEVILLE
(Unordered) PAR01-090	WOLFF, NANCY 1P20MH066170-01	Mental Health Services & Criminal Justice Research Ctr. (SE), RUTGERS STATE UNIVERSITY OF NJ

ZMH1-CRB-C-02
[Meeting Roster]
2 Applications
being reviewed

| (Unordered)
PA01-018 | MCHORNEY, COLLEEN
1R01MH066246-01 | Multimethod Study of Item Bias in Mental Health Measures (AD), INDIANA UNIV-PURDUE UNIV AT INDIANAPOLIS |
| (Unordered)
PA01-018 | TU, XIN
1R01MH066220-01 | Non- & Semi-Parametric Method For Effectiveness Research (SE), UNIVERSITY OF PENNSYLVANIA |

ZMH1-SRV-C-01
[Meeting Roster]
51 Applications
being reviewed

(Unordered) PA95-055	ALVERSON, HOYT 1R01MH064358-01A1	Ethnography of Clients in the NH Dual Diagnosis Study (SE-SC), DARTMOUTH COLLEGE
(Unordered)	BARSKY, ARTHUR 2R01MH040487-16A2	Hypochondriasis:Diagnosis, Description and Medical Care (SE-PC), BRIGHAM AND WOMEN'S HOSPITAL
(Unordered) PA00-005	BARTELS, STEPHEN 1K24MH066282-01	Interventions and Services for Older Adults with SMI (SE), DARTMOUTH COLLEGE
(Unordered)	BOSCARINO, JOSEPH 1R01MH066403-01	Mental Health Services in NY after WTC Disaster (SE), NEW YORK ACADEMY OF MEDICINE
(Unordered) PAR99-169	BRELAND, ALFIEE 1K01MH065061-01	Health Disparities of Depressed Black Adolescents (DP-SC), MICHIGAN STATE UNIVERSITY
(Unordered) PAR98-017	BREMS, CHRISTIANE 1R01MH066341-01	Comorbidity: Stigma & Ethical Practices in Rural Care (HB), UNIVERSITY OF ALASKA ANCHORAGE
(Unordered) PA00-004	BYERLY, MATTHEW 1K23MH064930-01A1	MENTORED PATIENT-ORIENTED RESEARCH CAREER DEVELOPMENT A (SE-SQ), UNIVERSITY OF TEXAS SW MED CTR/DALLAS
(Unordered) PA00-019	CONNOLLY, MARY 1K01MH063149-01A2	TRAINING IN SERVICES-INFORMED INTERVENTIONS RESEARCH (AT-CD), UNIVERSITY OF PENNSYLVANIA
(Unordered) PAR00-096	DAVIDSON, LARRY 1R24MH065954-01	Health Care Disparities Among People of Color (SE), CT ST DEPT OF MH AND ADDICTION SERVICES
(Unordered)	DEBAR, LYNN 1R01MH064125-01A1	Naturalistic Pharmacotherapy For Youth Depression (SE-CE), KAISER FOUNDATION RESEARCH INSTITUTE
(Unordered)	DEWA, CAROLYN 1R01MH066387-01	Healthcare Expenditures & SSRI Guideline Use (SE), CENTER FOR ADDICTION AND MENTAL HEALTH
(Unordered)	DRUSS, BENJAMIN 1R01MH054454-01A1	Integrating Primary Care for Patients at a CMHC (SE-PC), YALE UNIVERSITY

"200201" Council MH Application IRG Assignments for A%   https://intranet.nimh.nih.gov/ecb/assign_Prog.cfm?RequestTimeout=500

IRG Assignments for the 86
"200201" Council MH "A%" Applications

*Note: Due to the nature of review meetings and unexpected changes in people's schedules that inevitably occur for almost every big meeting, the **(Order of Review)** number shown below can **change last minute and/or may not be entered until a few days** before the meeting.*

IRG Recommendation Codes: **1** Approved, **2** NRFC, **3** Deferred, **4** Pending Final Action,
5 Competitive Triage Further Review, **6** Non-competitive Triage Not Considered

CSR Study Section & SEP information   Other NIH Committees

ZMH1-BST-B-01
[Meeting Roster]
3 Applications
being reviewed

(*Unordered*) PAR00-119	**GIOIA-HASICK,** **DEBORAH** 1R03MH064686-01A1	Neurocognition & Community Functioning: An Ethnography (**AD-P**), UNIVERSITY OF MICHIGAN AT ANN ARBOR
(*Unordered*) PAR00-119	**HETRICK, WILLIAM**	ERPs in schizophrenia and alcohol dependence (**AD-P**), INDIANA UNIVERSITY

ZMH1-CRB-B-01   Henry Haigler, SRA
[Meeting Roster]   National Institute of Mental Health Special Emphasis Panel
3 Applications   12/03/2001 - 12/03/2001, 0800 AM - 0600 PM
being reviewed   Phone: 301-652-2000
    Bethesda Holiday Inn
    8120 Wisconsin Avenue
    Bethesda MD 20814

(*Unordered*) PA96-007	**LIN, KEH-MING** 2P01MH047193-12A1	Rec: **1 (222 / 39.4%)** Research Center on the Psychobiology of Ethnicity (**AT-SO**), HARBOR-UCLA RESEARCH & EDUC INST

ZMH1-CRB-B-03   Henry Haigler, SRA
[Meeting Roster]   National Institute of Mental Health Special Emphasis Panel
4 Applications   11/13/2001 - 11/13/2001, 0900 AM - 1000 AM
being reviewed   Neuroscience Center
    National Institutes of Health
    6001 Executive Blvd.
    Bethesda MD 20892

(*Unordered*) PARS98-017	**HUSAIN, MUSTAFA** 2R01MH055489-06	Rec: **1 (154 / 8.2%)** Continuation ECT versus Pharmacotherapy (**AT-SO**), UNIVERSITY OF TEXAS SW MED CTR/DALLAS
(*Unordered*) PARS98-017	**KELLNER, CHARLES** 2R01MH055495-06	Rec: **1 (154 / 8.2%)** Continuation ECT vs Pharmacotherapy: Efficacy and Safety (**AT-SO**), MEDICAL UNIVERSITY OF SOUTH CAROLINA
(*Unordered*) PARS98-017	**PETRIDES,** **GEORGIOS** 2R01MH055486-07	Rec: **1 (154 / 8.2%)** CONTINUATION ECT VS PHARMACOTHERAPY--EFFICACY AND SAFETY (**AT-SO**), LONG ISLAND JEWISH MEDICAL CENTER
(*Unordered*) PARS98-017	**RUMMANS, TERESA** 2R01MH055484-06	Rec: **1 (154 / 8.2%)** Continuation ECT VS Pharmacotherapy: Efficacy & Safety (**AT-SO**), MAYO CLINIC ROCHESTER

ZMH1-CRB-C-01   Martha Carey, SRA
[Meeting Roster]   National Institute of Mental Health Special Emphasis Panel
13 Applications   10/25/2001 - 10/25/2001, 0830 AM - 0500 PM
being reviewed   Neuroscience Center
    National Institutes of Health
    6001 Executive Blvd.
    Bethesda MD 20892

(*Unordered*) PAR00-096	**KEANE, TERENCE** 1R24MH064386-01A1	Rec: **1 (245)** Infrastructure Support for HIV/AIDS Behavioral Health (**AZ-M**), BOSTON UNIVERSITY

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Resolution from the 1/23/02 meeting:

- *The NIMH query and output may meet the requirements. The screen prints were difficult to read at the CMUG. Screen prints will be brought to the next CMUG for further review. However, it was determined that users will need to view the meeting agenda, so an option to view the meeting agenda will be added.*

2.8   Last Update Date

The Last Update Date is being update when a user just views data. This has been reported and corrected on the Check register Screen. During the 1/16/02 meeting, we witnessed this happened on COM1100.

Resolution:

Colleen Blizard will take back to Logicon.

3.   Overall Reports Requirements

3.1   Upper/Lower Case Sorting

Upper case/lower case problem (not sure if I have a solution; forcing upper case works, but title case gives you Of, And, and Phd). These cascade to reports, such as the "around the table conflict form," which sort on mixed case and then upper case, putting reviewers out of alphabetical order. This requirement is item #12 on the spreadsheet. This item was discussed at the 12/12/01 meeting.

Resolution:

- *We will correct the sort.*

3.2   Naming the report PDF file

Ability to name and save PDF files (e.g., RESP ROS Roster). These are created when a report is run. This requirement is item #56 on the spreadsheet. This item was discussed at the 12/12/01 meeting.

Resolution:

- *We will allow users to provide a path and file name for the files. The path and file name will default so users are not required to enter that information when generating a report.*

3.3 Parameter Screens

Make better use of screen space so users don't have to scroll down to make all their selections and then scroll back up to run the report. Make Y/N selections easier. This is requirement #64 on the spreadsheet. This item was discussed at the 1/9/02 meeting.

Resolution:

- *This will be done in the redesign of the parameter screens.*

3.4   Force Uppercase E-mail

Force upper case should affect e-mail also. This is requirement #64 on the spreadsheet. This item was discussed at the 1/9/02 meeting.

Resolution:

- *This will be address in the redesign.*

3.5   Person Snapshot

Report on prospective reviewer - one page print out of available information to be used when contacting a person so as to verify existing information and take notes on what is missing. Elements needed/desired for a nomination slate (but not for a Temp member) would be so noted. To include:

 Name
 Degree
 Title
 ROS address
 MLG address
 HOM address (since the above two may not be in the system for a grantee, but HOM would)
 Phone, Fax, e-mail
 SSN
 Expertise (coded; free form)
 Gender
 Minority
 Date of birth ("slate required")
 Place of birth ("slate desired")

This is requirement #65 on the spreadsheet. This item was discussed at the 1/9/02 meeting.

Resolution:

- *Ev will look at the Person Snapshot and Appointment Snapshot reports to see if one of them can be redesigned to meet the requirements. Ev will send the redesigned format to Claire and Anna for approval. If approved, Claire/Anna will forward to Colleen to include in this document.*

The following layout is proposed by Ev Sinnett:

PERSON INFORMATION SHEET

CARTEE, GREGORY D., PH.D.
Title: **Professor**
Employment: **University of Wisconsin, Madison**

> **INTERNAL NIH USE ONLY - ILLEGAL TO FAX OR MAIL**. Please use the NIH Consultant Form for that purpose.

_ Profile Info   **X** Role Info for: **ZRG1 RESP 01, 2002/05**

MLG – addr type descrip here	ROS – addr type descrip here
Gregory D. Cartee, Ph.D. **Professor** **University of Wisconsin-Madison** **Department of Kinesiology** **200 Observatory Drive** **Madison, WI 53706** Ph: **(608) 262-7715** Ext. Fax: **(608) 262-1656** **cartee@soemadison.wisc.edu**	**Gregory D. Cartee, Ph.D.** **Professor** **University of Wisconsin-Madison** **Department of Kinesiology** **Madison, WI 53706** Ph: **(608) 262-7715** Ext. Fax: **(608) 262-1656** **cartee@soemadison.wisc.edu**
HOM – addr type descrip here	CRR – addr type descrip here
Gregory D. Cartee, Ph.D. **Professor** **University of Wisconsin-Madison** **Department of Kinesiology** **200 Observatory Drive** **Madison, WI 53706** Ph: **(608) 262-7715** Ext. Fax: **(608) 262-1656** **cartee@soemadison.wisc.edu**	**Gregory D. Cartee, Ph.D.** **Professor** **University of Wisconsin-Madison** **Department of Kinesiology** **200 Observatory Drive** **Madison, WI 53706** Ph: **(608) 262-7715** Ext. Fax: **(608) 262-1656** **cartee@soemadison.wisc.edu**

Sensitive Data:

SSN - **123-45-6789** Gender: **M**   Ethnicity: **Non-Hisp** Race: **Black or Afr**

Date of Birth (reqd): **2/14/57** Place of Birth: **Seneca, SC**

Coded Expertise: **aging and nutrition; carbohydrate nutrition; endocrine physiology; exercise physiology/stress/kinesiology; metabolic/nutritional physiology; gerontology/geriatrics**

Free Form Expertise: **insulin action; insulin signal; exercise physiology, muscle metabolism, muscle glucose transport, aging, insulin action, nutrition and exercise, carbohydrate metabolism, exercise biochemistry, kinesiology**

Requirements:

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        Per discussion at the CMUG meeting Wednesday, I've drafted a concept
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for the one page report on prospective reviewers. This was item 65 from the spreadsheet.

Some comments on it:

I have not had time to share this with other SRAs for feedback (but am doing so with this e-mail). Ms. Jenifer, if you could share this with whoever suggested that you bring it to the focus group meeting in October, I'd appreciate hearing back on whether it fills the bill.

In this example, everything fits on one page. I suspect SRAs would prefer a) to keep it on one page and b) to have the full address information at the expense of truncating expertise, if necessary, to keep the report to one page.

The warning note is purposely prominent, but it could be reduced to fine print at the bottom of the page to allow more room for expertise. Is there a web address or other link that could take people to the Consultant Form?

The concept would be for an SRA to start by finding a person in the Person Search. If the cursor were left either in the Last Name field in the query area or on a record in the Person Listing, the Report Parameter screen would have some note that the Profile information would print on the report. If the cursor were placed in one of the Committee Service fields, the Report Parameters screen would let the user know that that Role Record would appear in the report.

I think bolding of the retrieved information would make it stand out from the labels.

If the address fields could be put in a table with a floating number of lines, that would be most efficient and would be easier to read.

I suspect most people would be satisfied with the four address types shown (I included HOM because a person who has not yet reviewed but has had a grant would have this in their Profile). If needed, an enhancement would be to allow users to select the address types to be printed. I would include phone, fax, and e-mail wherever present; they are often not the same across address types.

I left the name, degrees, and title in the address fields. If the report ever ends up in a downloadable format, this arrangement would be helpful. If that's not in the cards, space could be saved by leaving these two lines out.

Capturing all expertise fields would be good, then string them end to end separated by semicolons. Converting to lower case saves space. I would truncate coded expertise at three lines at the most, maybe two.

The Ethnicity and Race fields can be truncated to save space while conveying the coding. Definitely do NOT use the codes of N and 5.

I didn't see free form expertise in that Person Snapshot report, but everything else is there, I believe. The adjustment in formatting would make it far more useful for Review staff, however.

Created: 1/9/2002 5:26 PM
                                                        Last Updated: 1/23/2002 6:56 PM

Resolution from the 1/23/02 meeting:

- *The parameter screen will allow users to select up to 4 address types to output on the report. It will default to the MLG and ROS address types.*

- *This layout replaces the Person Snapshot Report.*

- *Layout changes discussed in the meeting were made to the proposed layout above.*

3.6   Voucher Form – NIH-1715 (reimbursement form)

1. When printing Reimbursement form, need a choice to print the standard disclaimer (about SSN and personal info) after each reimbursement page or to print several copies of the form or leave as is (single copy at the end for duplication). If printer allows, front and back printing would be an ideal option. POLICY QUESTION - Do we NEED this statement? This is requirement #66 on the spreadsheet. This item was discussed on 1/9/02.

Resolution:

> *The form is an approved form. The SSN statement must be sent with each voucher.*

2. Voucher Printing - tie to verification that applications attached to meeting. Example of problem: One of the GTA's entered a meeting twice 1 with applications and the other one with-out applications. When it came to audit the vouchers the GTA gave the travel office vouchers that had no applications attached to the meeting. It is a BIG problem when this happens. We ,the travel office has to go back and re audit those vouchers. Another one to add to the wish list. The SRA or GTA should not be able to print out consultant vouchers that have no applications attached to that meeting. Priority 1. If you have any questions please let me know. This is requirement #75 on the spreadsheet. This item was discussed at the 1/16/02 meeting.

Resolution:

> *If the agenda code is grant applications (01), the voucher cannot be printed if no applications are attached to the meeting. Kay Valeda will e-mail Colleen Blizard the wording for the message that will be displayed to the users.*

3.7   Cover and End Sheets

Eliminate cover and end sheets from reports. (or at least make them optional with default off). This is requirement #67 on the spreadsheet. This item was discussed on 1/9/02.

Resolution:

> *Parameters will be added to make the cover and end sheets optional. It will default to 'N' for all reports except the following: Federal Register Notices, Expense Ledger Reports and President's Annual Reports.*

3.8   Invitation to Travel Report

Suppress the phone and mail reviewers and SRA and GTA names. This is requirement #68 on the spreadsheet. This item was discussed on 1/9/02.

Resolution:

- *Create a grid parameter form as decided for the meeting roster.*

3.9   Conflict Form for Mail Reviewer

Mail Reviewer needs to receive a conflict form with preprinted data. However, it should not include a listing of applications from the same institution, since a mail reviewer will never see them or hear them discussed. This is requirement #69 on the spreadsheet. It was discussed at the 1/9/02 meeting.

Resolution:

- *This is a Peer Review issue. Ev will bring it to the RUG.*

3.10 Meeting Schedule Report

Screen and/or report showing meetings (regular and SEP) (e.g., query based on SRA name). Similar report for cluster/IRG. Default to current council. This is requirement #70 on the spreadsheet. It was discussed at the 1/9/02 meeting.

Resolution:

- *Modify the parameters for this report. Allow for Acornym, SRA, Group, Flx combination. Use the 'grid' method.*
- *The report should show shell meetings.*
- *Sort on date, SRA, IRG, Flx and Grp.*

3.11 Appointment Snapshot Report

Appointment Snapshot Report is not used by CSR and could be considered for elimination. This is requirement #71 on the spreadsheet. This item was discussed at the 1/9/02 meeting.

Resolution:

- *This report is used by the CMO and other users.*

3.12 Conflict Forms for Working Groups in CM

Working Groups get set up in CM and have need of conflict forms. I'm not certain, but was told that they could not be called up in the Review module. REV has conflict forms, but CM does not, as far as I can tell. Thus, the request is to pirate that functionality from REV so that these conflict forms can be run off in CM for Working Groups. This is requirement #71A on the spreadsheet. This item was discussed at the 1/9/02 meeting.

Resolution:

- *Conflict Forms for Working Groups are being reviewed. At this time, there are no conflict forms for Working Groups. They will be added to CM in the future.*

3.13 Blank Conflict Form

A related request (which I will also submit to the RUG) is to incorporate a totally blank conflict form. The issues are: 1. putting the form on the web (the original idea of the suggester) would require maintenance whenever the form changes. If it is in IMPAC II, it would be kept up to date. 2. In the review module, users are always "in a meeting." That is, there is a default meeting selected whenever they login. Thus, getting a totally blank form would take some extra programming and would be a low priority. (On the other hand, those of us in review would like to see the CM redesign include a default meeting as well.) This was not a high priority item for us in any event, but I was asked to pass it on. This is requirement #71B on the spreadsheet. It was discussed at the 1/9/02 meeting.

Resolution:

- *This is a RUG issue.*

3.14 Fiscal Year Report for Expenses

Fiscal Year Report for Expenses. This is item #83 on the spreadsheet. It was discussed at the 1/16/02 meeting.

Resolution:

More information is needed. Ev will research and we will re-visit at a later meeting.

4.   CM Splash Screen (CM0000)

4.1   Release Notes

CM0000-add button for release notes.   This requirement is item #20 on the spreadsheet. This item was discussed at the 12/12/01 meeting.

Resolution:

- *This will be released with the January, 2002 deployment.*

5. Nomination/Appointment Screen

5.1   Competency

Both items below are discussed in a single resolution. These items were discussed at the 12/12/01 meeting.

1. Users will enter competencies when they create a roster, but will then need to reenter the competencies the next time they create a roster with the same individual. The issue here is confusion between roles and profiles, displays in the Review module, and inconsistencies in the source of data when a role is created. In other words, a user might pull in a role record for one roster, then pull in the Profile for the next, with inconsistencies in the results. Users need to better understand the Profile/Role system AND have a clear understanding of the source of information when they create a roster. This requirement is item #46 on the spreadsheet.

2. Simplify Expertise (coded, free text) and competency. The coded text entry should be simplified if it can't be eliminated. There should NOT be separate fields for expertise and competency (redundant). This requirement is item #126 on the spreadsheet.

Statement:

- *Expertise and Competency are used differently throughout CM.*
- *Expertise is a more detailed description.*
- *Competency is a brief description.*

Resolution:

- *Allow for optional copy of SRA expertise into the competency field when setting up the nomination/appointment.   A list of SRA expertise will be displayed, the user will be able to select the SRA Expertise, edit it, then save it to the nomination/appointment record.*

6.   Meeting Data Screen (CM1050)

6.1   Default Meeting Set Up

Be able to set a default meeting, similar to what is done in Review. Should show on banner screen. This requirement is item #16 on the spreadsheet. This item was discussed at the 12/12/01 meeting.

Statements:

- *SRAs and GTAs need clusters. We need to add cluster security to CM.*
- *CMOs & SREAs need access to all committees for their IC's.*
- *OFACP needs access to all committees and IC's.*
- *NACs, PACs and BSCs are not in Peer Review and do not need clusters.*

Resolution:

- *CM will add cluster security for the meeting data screen.*
- *CM will allow users to set default meetings. Setting default meetings will not be a requirement so CMOs, SREAs and OFACP will continue to work at the committee level.*

6.2   Default List of Meetings

On login, the system should by default show your last five meetings regular and SEP combined. This requirement is item #17 on the spreadsheet. This item was discussed at the 12/12/01 meeting.

Statements:

- *If we show the last 5 meetings, NAC, PAC and BSC would show 2 ½ years of meetings.*
- *SRAs would like to see the last 5 meetings that they worked on.*

Resolution:

- *We will change the query parameters on the Meeting Data screen to include the parameters from the Peer Review Select/SRG Meeting Screen. The Meeting Data Screen will retain its existing query and 'set filter' functionality. There will not be a limitation*

to the number of meetings that are displayed. The default meeting setting will be a user preference.

6.3   Querying Meetings

6.3.1 Select Meeting from a Cluster LOV

Select meeting from a cluster LOV, as in Review.   This requirement is item #18 on the spreadsheet. This item was discussed at the 12/12/01 meeting.

Resolution:

- *As per the 'Default List of Meetings' requirement, we will combine the query parameters from the Peer Review Select/SRG Meeting Screen. Additional user roles may be created to split user security between the two systems.*

6.3.2 Simplify Ability to Query on SEPs

Simplify ability to query on SEPs (see REV model). "Set Filter" should not be needed - allow entry of, e.g., ZRG1 RESP 01, although group code should not be required. This requirement is item #19 on the spreadsheet. This item was discussed at the 12/12/01 meeting.

Statement:

- *Set Filter is needed and is used heavily by OFACP.*

Resolution:

- *As stated in the 'Default List of Meetings' requirement, we will combine the query parameters from the Peer Review Select/SRG Meeting Screen, which will allow users to query more easily on SEPs.*

6.4   Chairgrant Validation

Meeting Maintenance: Need edit check to make sure when meeting is checked OK/Complete that there is a valid chairgrant number and name. This requirement is item #27 on the spreadsheet. This item was discussed at the 12/12/01 meeting.

Resolution:

This requirement will be released with the January, 2002 deployment.

6.5   Standing Members

There are four requirements/suggestions for adding standing members to a roster. Below are the requirements/suggestions. There is a single resolution for all four. These items were discussed at the 12/12/01 meeting.

1. For a chartered committee, as soon as the first application is added to the meeting shell, all Standing Members should automatically populate the Roster in the same manner that the SRA's name appears. This requirement is item #32 on the spreadsheet.

2. Rosters: As meeting is created (or when editing a meeting stub created by R&R), import chartered members (with check box to exclude those not attending - see REV). This requirement is item #33 on the spreadsheet.

3. Alternative for adding Standing Members: For a chartered committee, the first time someone attempts to Add Member, a window should pop up as a reminder to bring in Standing Members first. This requirement is item #34 on the spreadsheet.

4. All Standing Members - where is information drawn from? The Profile? Information seems to change from round to round. Some would prefer to pull in Role record for those who served at the preceding meeting. This requirement is item #35 on the spreadsheet.

Statement:

- *There was strong opposition to automatically adding all standing members when the shell is created.*

- *Member person information comes from the role. When questions arise as to where data came from, Tracey David will contact Colleen Blizard so troubleshooting can be done.*

Resolution:

- *The "Add All Standing Members" function will be changed so that a window will be displayed listing all standing members. Users will have the ability to select/deselect members. Only members selected will be added to the roster.*

6.6   Copy / Export Roster

6.6.1 Copy Roster

A "Copy Roster" feature would be useful. Identify source and target meetings, then apply copy. Check boxes allowing the entire roster or a subset of reviewers to be copied into the designated meeting. This requirement is item #36 on the spreadsheet. This item was discussed at the 12/12/01 meeting.

Statement:

- *Possibly format like the Prospect List in Review with the roster on the right and the possible members to select on the left.*

Resolution:

- *Expand the Previous Members button to allow users to query an old meeting, view the entire roster from that meeting. The user should be able to select one or more members via a checkbox for the current meeting. All role information should be copied from the previous meeting to the current meeting.*
- *Only copy the people data.*
- *Display in a spreadsheet format.*
- *Provide functionality so users can sweep dates.*

6.7   Upload Roster

1. Expertise - Why must these fields (coded and free form) be copied into the role? It should certainly not be required for SRAs. This requirement is item #45 on the spreadsheet. This item was discussed at the 12/12/01 meeting.

Resolution:

- *SRA Free-form expertise will be optional. Expertise is required for roster upload.*

6.7.1 Export Roster

New button to allow export of Roster to Review Module. SRAs and GTAs should be excluded. This requirement is item #53 on the spreadsheet. This item was discussed at the 12/12/01 meeting.

Resolution:

- *The Meeting Data Screen will be a shared screen between CM and Peer Review.*

6.8   Meeting Attendees Data

6.8.1 Need for all Data Elements

Edit Meeting Attendee: Are all of the following fields really needed? Could any be combined or deleted? (Appt Type, Member Type, Role Sci/Pub, Serving as Fed Emp, Travel Type, Fed Emp Code, Fed Emp, Type, Attendee Type Code/Description, Attendee Role Code/Description, Attendee Classification Code/Description, Meeting Travel Type).   This requirement is item #39 on the spreadsheet. This item was discussed at the 12/12/01 meeting.

Resolution:

- *All fields are needed.*

- *At the 1/9/02 meeting, it was clarified that the attendee role and attendee classification are both needed. The attendee role field is the role at the meeting. The classification is how they are participating at the meeting.*

6.8.2 Adding a field to indicate a full time Fed (VA)

If all fields on Edit Meeting Attendee screen are needed, then design LOV which combines the most common formats for reviewers, who are one of three types: totally non-Fed; part time VA and part time university; full time Fed (VA). This requirement is item #40 on the spreadsheet. This item was discussed at the 12/12/01 meeting.

Statement:

- *University appointment can be used to fulfill this requirement.*

Resolution:

- *Not a requirement. User education needed.*

- *At the 1/9/02 meeting, further discussion decided that we will add a 'Need VA Form' checkbox to the Meeting Attendee Screen. It will default to No.*

- *Caroline Grabner will provide the layout and business rules for the generic VA Form report that will be printed for meeting attendees that need a VA form.*

6.8.3 Competency / Comment Fields

Eliminate competency field/combine with expertise (is this needed on this screen?). This requirement is item #125 on the spreadsheet. This item was discussed at the 12/12/01 meeting.

Statement:

- *Competency is display only on the Meeting Attendee Screen.*
- *It is entered with the nomination is created.*

Resolution:

- *Remove the comment and competency fields from the Edit Attendee Screen.*

6.9 Percentile Base Entry at time roster is finalized

Finalize roster to include designation of a % base for SEPs. Since this base might change, the Review Module would need to include a verification screen & allow changes. This requirement is item #52 on the spreadsheet. This item was discussed at the 12/12/01 meeting.

Resolution:

> *The percentile base may not be correct at the time the roster is completed.   This will be handled within the Peer Review application.*

6.10 University and State Display

Meeting Roster Block - Fix it so state and university appear; most often, these fields are blank. (Currently, these fields are tied to messing with the Employment data, but state could be pulled from the ROS named field. If/when "university" is a named field, that should come in, too.) In addition or as an alternative, the Review Module IPF lookup could be used. This requirement is item #123 on the spreadsheet. This item was discussed at the 12/12/01 meeting.

Resolution:

> *This item will be simplified once the IPF is redesigned during the People Screens Redesign.*

6.11 Meeting Location

Meeting site: just one listing per address, make it customizable for room (consistent with CMUG discussion). This requirement is item #26 on the spreadsheet.   This item was discussed at the 12/12/01 meeting.

Resolution:

> *This requirement was discussed at the October 10, 2001 CMUG meeting. See the requirements document from that meeting.*

6.12 Advanced Person Search Capability for Roster Members

Would like to see the same multiname search capability for Rosters as exists in the Advanced Person Search in Review. Or simply incorporate Advance Person Search. This requirement is item #129 on the spreadsheet. This item was discussed at the 12/12/01 meeting.

Resolution:

- *The Advanced Person Search Screen will be added to the roster search functionality.*

6.13 Mailing Label Capability

Would like a button to create labels from the current COM1200 screen. This requirement is item #57 on the spreadsheet. This item was discussed at the 12/12/01 meeting.

Statement:

- *User's want to generate labels from the CM1050 screen, not the COM1200 screen.*

- *At a previous CMUG meeting, users were asked to test the 'Generate Mailing Label' report within CM.   At this time, no one has provided any feedback on that report.*

Resolution:

- *User's were asked to test the report and provide feedback.*

Ev provided the following feedback on 1/9/02:

1. *The menu item should be plural - Labels - to avoid confusion, since a single name does appear on the Report Parameters screen*

2. *If you highlight a meeting in the Meeting Details block, you shouldn't need to re-enter the date; it obviously knows what meeting you're on, since the first reviewer appears on the Report Parameters screen.*

3. *The address type should default to MLG, not ROS. This is billed as a MAILING label report, after all.*

4. *I'm not sure what "Prefix" means (Dr.?), but degrees should default to Y.*

Resolution from the 1/23/02 meeting:

No objections.

6.14 Meeting Roster Verification Screen

1. Proposed vs Actual Committee Service dates - when do these get cleared? In one example, a person showed NAC service as Proposed from 99 - 03, but was not serving. While paperwork clearance can hold things up for awhile, there ought to be a limit. This was probably caused by a "hold." In a different example, it appears that reviewers who serve on two committees on the same day but who are only vouchered on one never have the "actual" filled in for the other meeting. This service ought to get verification so it will appear on reports as "actual." The proposed post meeting roster verification screen should serve to fill in the "Actual" on committee service. This requirement is item #109 on the spreadsheet. This item was discussed at the 12/12/01 meeting.

Resolution:

- *Add an attendance sheet on the Meeting Data Screen. Allow users to sweep the end dates. This should tie in with the voucher form.*

Feedback from Ev Sinnett on 1/9/02:

1. *Need the capability to convert an attendee to a mail reviewer.*

2. *Allow for updating the end date of service.*

3. *Add LOV for phone reviewer participation, 'call made' and 'call not made'.*

4. *Allow for deleting attendees that did not attend the meeting.*

2. Roster verification screen (post meeting) - attended, phone, number of days honorarium, for SRA/GTA input; should link to start and end days for end of year report. This requirement is item #76 on the spreadsheet. This item was discussed at the 1/16/02 meeting.

Resolution:

> *The Roster Verification Screen will satisfy this requirement.*

Resolution based on discussion at the 1/23/02 meeting:

- *Add verified date and ID to be populated when user indicates roster attendee information is verified.*
- *Once verified, the voucher # of days field will be populated.*
- *Meeting attendee can be converted to a mail reviewer.*
- *Meeting end date will be updateable.*
- *'Call Made' and 'Call not made' will not be added. Anna will address situation with LaVerne.*
- *If deleting an attendee, prompt user with an 'Are you Sure' type of message.*
- *Roster Verification screen will only be used for IRG and SEP committees.*

6.15 Add/Edit Meeting

1. Are all of the following fields really needed? Could any be combined or deleted? Meeting Explanation, Meeting Format, Meeting Type Code, Agenda Code and Access Code. This is requirement #21 on the spreadsheet. This item was discussed at the 1/9/02 meeting.

Resolution:

- *The Meeting Explanation field is not a required field. Some CSR users use this field. All other fields are required and needed.*

2. If all fields on the Edit Meeting are necessary, design LOV which combines the most common formats for grant reviews (e.g., blank, Regular, Regular, Grants, Closed). This is requirement #22 on the spreadsheet.   Edit Meeting screen – most (all?) values should default for chartered committees. This is requirement #23 on the spreadsheet.   These items were discussed at the 1/9/02 meeting.

Resolution:

- *Allowing users to set a preference for the most common formats was discussed. It was decided that no user preferences would be allowed because of potential data entry errors if users did not update the data.*

3. Edit meeting screen – default SEPs based on decade of group number (e.g., 1-9 = grants, 20-29=fellowships, etc.) This is item requirement #24 on the spreadsheet. This item was discussed at the 1/9/02 meeting.

Resolution:

- *Group codes are used differently in the various IC's. We cannot default the group codes.*

6.16 Term of Chair

Chair term – when mtg is marked OK/Complete, check to see if the meeting date falls within the term of the chair. This is requirement #28 on the spreadsheet. This item was discussed at the 1/9/02 meeting.

Resolution:

- *It was decided at a previous meeting that the system would not allow a meeting to be marked as complete if a chairgrant was not entered. The system will not verify that the meeting dates fall within the effective dates of the chairgrant.*

- *If a members term ends before the dates of the meeting, the member should not be allowed on the meeting. Logicon will verify that the system behaves in this manner.*

6.17 E-Mail Alerts

E-Mail alert to GTA, SRA, CMO if a meeting is to be held within four weeks and the OK/Check Complete box has been checked. This will help prevent illegal meetings. A warning should also be seen by anyone logging in to a meeting as part of cluster security. This is requirement #29 on the spreadsheet. This item was discussed at the 1/9/02 meeting.

Resolution:

- *E-Mail notification is being working on by another team. Once this is released, CM can borrow the functionality.*

6.18 Simplify/Clarify Meeting Data Screen

Simplify/clarify display of meeting data complete, FRN and roster upload. This is item #30 on the spreadsheet. This item was discussed at the 1/9/02 meeting.

Resolution:

- *This will be done in the redesign.*

6.19 Mail Reviewers

When adding a Mail Reviewer to an SRG, all fields should default based on that selection. This is item #37 on the spreadsheet. This item was discussed at the 1/9/02 meeting.

Resolution:

- *The functionality should be in Peer Review. Ev will take this to the RUG.*

6.20 GTA Listing on Roster

Simplify GTA listing on roster (problem with vouchers being printed). I'm told this is due to incorrect entry, if so, the process needs to be more intuitive. This item was discussed at the 1/9/02 meeting.

Resolution:

- *GTAs should be added to the committee on the Committee Administration Screen, Federal Staff Canvas. The GTA can then be selected to attend a meeting using the Federal Staff search on the Meeting Attendee Canvas.*

6.21 Roster Finalization and Checks

Need a "complete" flag for roster to indicate when it is final. There is general agreement that the roster should not be shown to the public or on the web before it is marked "complete". Need a warning if not complete five weeks before the meeting, since the roster will appear on the web shortly. This is requirement #50 on the spreadsheet. This item was discussed at the 1/9/02 meeting.

Resolution:

- *Add a 'Roster ready for web' field. Co-ordinate with Mike Goodman, to make sure the ros_mtg table in the Commons also adds this new field.*

6.22 Error Checklist on Finalizing a Roster

Error check on finalizing roster: check for quorum of chartered members (flashing alert if not met), entry of title for each reviewer, entry for "Dept" if we move to named fields. Allow for "Proceed" even if not all items satisfied. This is requirement #51 on the spreadsheet. This item was discussed at the 1/9/02 meeting. Item 54B on the spreadsheet is the same requirement.

Resolution:

- *Create an Edit Checker for 'roster ready for web' field. The following criteria must be met before the 'roster ready for web' field can be checked: a chair must be on the roster, gender and ethnicity data must be entered for all attendees, the title for each reviewer must be on the person role level record of the attendee and the meeting must be announced on a federal register notice.*

6.23 Download address info for FedEx Machines

Provide download or courier address information for SRG in format compatible with FedEx Machines. This requirement is item #58 on the spreadsheet. This item was discussed at the 1/9/02.

Resolution:

- *Federal Express will be phasing out the machines so this requirement cannot be done.*

6.24 Printing the Meeting Roster

When printing the roster, should only have to select the SRG and date and not have to specify the Federal Staff. That is, query on SRG and select the desired meeting from a window, which displays most recent

meeting at top. Option to enter council date instead. This is requirement #59 on the spreadsheet. This item was discussed at the 1/9/02 meeting.

Resolution:

- *Allow for Review and CM meeting query parameters for query a meeting roster. This will allow users to query like they do in the Review module.*

6.25 Printing Several Versions of the Meeting Roster

When printing meeting rosters, we would like the ability to select several roster types and print sequentially without having to go back and re-specify the same meeting information. This item was discussed at the 1/9/02 meeting.

Resolution:

- *Create a parameter form that has a grid that will allow the users to select the address type with various other parameters. See sample below. All parameters currently available for the meeting roster will be available in the grid.*

Addr Type	Phone/Fax/E-Mail	Force Upper Case	*Other parameters*
ROS	*Y*	*N*	*….*
MLG	*N*	*Y*	*…*

6.26 Hotel Roster Report

Meeting Roster Reports – Add optional print: 1. Hotel, 2. City, State, Zip of hotel; 3. Panel Name. Items 1 and 2 should default to Y (print), item 3 to N (don't print) (or be customizable to user). Since these fields are not connected to the summary statement roster, no EPMC approval needed, per Brent Stanfield. This requirement is item #61 on the spreadsheet. This item was discussed at the 1/9/02 meeting.

Resolution:

- *Anna Snouffer will provide a layout and business rules.*

6.27 Travel Roster

For WTS/Hotel/GTA roster reports, need ability to identify telephone reviewers. For WTS & hotel, exclude phone, mail, SRA and GTA from printing. This requirement is item #62 on the spreadsheet. This item was discussed at the 1/9/02 meeting.

Resolution:

- *Anna Snouffer will provide a layout and business rules.*

6.28 Application Information for a Meeting

Screen and/or report showing "Master List" of applications for a meeting. This is requirement #72 on the spreadsheet. List of applications - could borrow display from REV, which is sortable and more useful, but add column to display WD and DF. This is requirement #73 on the spreadsheet.   The List of Applications should show Withdrawn appls (currently just shows Deferred). This is requirement #74 on the spreadsheet. These items were discussed at the 1/9/02 meeting.

Resolution:

- *We will replace the current List of Application canvas with the functionality for viewing application from the Review List of Applications form.*

Defaulting Values when Creating Working Groups

Edit mtg: When using "Working Groups," the title could default to three required fields instead of requiring repeated entry. This requirement is item #25 on the spreadsheet. This item was discussed at the 1/9/02 meeting.

Resolution:

> *Not all fields are required if the meeting is not checked as complete. Non-FACA meetings do not require an FRN so they do not have to be checked as complete. Three fields repeat data for CSR. It was suggested that they use the Ctrl-C and Ctrl-V copy-and-paste feature to copy the data.*

6.29 Authority to Close and Reason to Close required for workgroups?

At the 1/16/02 meeting, a question came up regarding why the authority to close and reason to close fields are required when creating a workgroup meeting.

Resolution:

This issue will be re-visited at the 1/23/02 meeting.

6.30 Additions to the LOV Reason to Close

At the 1/16/02 meeting, discussion regarding additional options for the Reason to Close LOV arose.

Resolution:

This issue will be revisited at the 1/23/02 meeting.

6.31 Navigation to Voucher Screen

Voucher/ADB Data button should link to person highlighted in Meeting Roster block. This is item #84 on the spreadsheet. This item was discussed at the 1/16/02 meeting.

Resolution:

This will be fixed in the redesign.

6.32 Administrative Expenses

CM1050-Adminstrative Expense Maintenance: next to each item would like a field so SREA can input the date they received the bill. This is item #86 on the spreadsheet. It was discussed at the 1/16/02 meeting.

Resolution:

> *This requirement was discussed at the 11/28/01 CMUG Requirements Meeting. See the meeting notes from that meeting.*

6.33 Ability to assign federal staff on a meeting by meeting basis

Generally, only a single Fed Staff person should be connected with a particular designator. This rule allows Receipt and Referral to assign applications both to a standing committee as well as any SEPs to be run by the same SRA without having to manually assign Fed Staff to the SEPs. On occasion, however, there is a need to fully replace the Fed Staff for a single meeting without having to "end" the original SRA, since the original SRA could still be running other meetings the same round. Examples of the need include training of brand new staff, recovery from major surgery, maternity leave, etc. Thus, the redesign should allow for the insertion of a different SRA as Fed Staff on a meeting by meeting basis without having to adjust start and end dates. This requirement is from an e-mail from Ev Sinnett on 1/14/02.

Resolution:

> *User's should do one of the following:*
> - *SRAs dates should be ended and they should be re-entered as an SRA with a new term.*
> - *If an SRA doesn't attend their meeting, he/she can be deleted from the roster and the attending SRA can be added.*

6.34 Degrees during the create roster process

44A: Copying degrees into the Role record is somewhat tedious at present. Even more tedious is deleting unwanted degrees - each reviewer must be dealt with individually, and the degree screen is several layers deep. Thus, this is to suggest two alternative methods that would be far simpler and more easily accessed and used.

First, have a Roster Degrees screen. This screen would display last and first names of all reviewers vertically and the degrees currently stored with that Role horizontally next to the names in a grid. Radio buttons would be checked beside each degree to allow the user to uncheck (exclude) degrees. Additional functionality would be a button to Import Degrees from

Individual Profile, a button to Clear All, and a button to Import Degrees from Profiles, All Reviewers. This screen would vastly simplify both the verification and correction process.

Second, the screen for individual selection of reviewers for roster inclusion needs improved functionality - scrolling through degrees should not be required. They could be displayed similarly to the Roster Degrees screen described above (the programming need only be done once), or a larger window displaying all degrees vertically at once with radio buttons for selection could be used.

The above is from an e-mail from Ev Sinnett on 12/14/01. It was discussed at the 1/16/02 meeting.

Resolution:

> *CMUG attendees felt this is a RUG issue. However, since CM and Peer Review will be integrating meeting and roster functionality, we will keep this in mind as we integrate the two systems.*

7.   Voucher/ADB Screen (CM1054)

7.1   Create a Voucher Status Screen

Shared screen - voucher received, where in process, date paid. SRA and GTA access (view only). This is requirement #77 on the spreadsheet. It was discussed at the 1/16/02 meeting.

Resolution:

> *SREA officers won't use this feature. This will not be added to the system.*

7.2   E-Mail to GTA when Voucher has been paid / Voucher Report

Would like an e-mail sent to GTA when voucher has been paid. (The shared Voucher screen may be a better solution.) This is requirement #78 on the spreadsheet. It was discussed at the 1/16/02 meeting.

Resolution:

> *Not all GTAs will want to be notified when vouchers are paid. E-Mail will not be sent. However, to aid the GTA in seeing the status for vouchers, a new "Voucher Status" screen will be created. Vouchers will be displayed grouped by a meeting. This screen will display the voucher number, attendee name, check number and check date. User's will have the option of printing the data on this screen in a report format.*

7.3   Per Diem Rates

Per diem rates should default from known data and known meeting location. This is requirement #79 on the spreadsheet. It was discussed at the 1/16/02 meeting.

Resolution:

> *This item was discussed at the 11/28/01 CMUG Requirements meeting. See the meeting notes from that meeting.*

7.4   Streamlining Vouchers

Vouchers - can be streamlined. Most vouchers only have the hotel and FedEx receipts. Lets have the SRA certify the cost of the hotel with receipts only needed for those claiming something different. FedEx should mostly go away as we move to Cds but maybe we can think about these receipts too. Thus we could do all vouchers online perhaps using the same web interface as the internet assisted review module to be added next year. An SRA/GTA certification area would be needed confirming the meeting participants, the number of days for each and the hotel rate. HOWEVER, SRAs would need to know the FULL cost per day (including taxes, energy surcharges, etc), but these would at least be standard in most cases. Tricky aspects would be, e.g., folks who drive in from Baltimore in the morning, others who stay with a friend or relative, etc. The web interface is an idea, though. This is going to be designed for them to post their reviews at a secure site. If we were to allow them to also use it to post hotel and delivery costs, would that satisfy auditors? Also need to know if SREA can survive without hard copy paper trail. This is requirement #81 on the spreadsheet. It was discussed at the 1/16/02 meeting.

Resolution:

   This is an IRS issue. We can't do this.

7.5   Meeting Expense Search Screen

Meeting Expense Search screen: if you have a valid voucher number there must be a total in the hit list grid (edit check feature). [Item may need confirmation/clarification from SREA.]. This item is #85 on the spreadsheet. It was discussed at the 1/16/02 meeting.

Resolution:

   More information is needed. Ev will clarify. We will discuss at a later meeting.

7.6   Electronic Submission of Vouchers with Electronic Signatures

Electronic submission of vouchers with electronic signatures. This is item #87 on the spreadsheet. This item was discussed at the 1/16/02 meeting.

Resolution:

   Deferred for a later release.

7.7   Telephone Reviewer

It was discussed at the 1/16/02 meeting that indicating on a voucher that the attendee is a telephone reviewer would be helpful.

Resolution:

After the 'Meeting Attendee' label, say 'Telephone Reviewer' if the persons attendee record indicates he/she is a telephone reviewer.

8.   Check Register Screen

8.1   Import Checks

Be able to import information from check writer into IMPAC II, with an exemptions report for errors. This is item #80 on the spreadsheet. It was discussed at the 1/16/02 meeting.

Resolution:

> *This item was discussed at the 11/28/01 CMUG Requirements meeting. See the meeting notes from that meeting.*

9.   Committee Administration (CM1080)

9.1   General

CM1080: title, start date, end date disappear intermittently, don't want this to happen. This requirement is item #91 on the spreadsheet. This item was discussed at the 12/12/01 meeting.

Resolution:

> *The fix for this is planned for the January, 2002 deployment.*

9.2   Federal Staff

1. CM1080, Committee Adminstration: able to archive names of retired or deceased Federal Staff with an end date, so names no longer appear on pick list. Be able to see the latest information not the whole history. At the least, have a sort button for End Date bringing the most recent to the top. This requirement is item #88 on the spreadsheet. This item was discussed at the 12/12/01 meeting.

Resolution:

- *Allow for sorting on the end date and last name.*

2. CM1080:Since some retired Fed Staff return to the workforce, we need to be able to pull back Fed Staff names from the archive. They may be assigned to different SRGs than the one they had originally. This requirement is item #89 on the spreadsheet. This item was discussed at the 12/12/01 meeting.

Resolution:

- *Federal Staff can be selected from the persons table.*

3. Eliminate duplicate entries in Fed Staff. This requirement is item #90 on the spreadsheet. This item was discussed at the 12/12/01 meeting.

Resolution:

- *We will add business rules so that users cannot enter a primary federal staff person with the same SRA Org and Designator codes for SEPs for the same time period.*

10. Nomination/Slate Proposal

This requirement was sent via e-mail by Ev Sinnett on 1/9/2002.

PROPOSAL TO ALLOW USERS (SRAs AND GTAs) TO ASSEMBLE NOMINATION SLATES DIRECTLY IN CM AND PRODUCE ALL REQUIRED REPORTS

At a recent CMUG meeting, I was charged with contacting the CSR CMO to address ways in which the new CM module could make the process of assembling a Nomination Slate simpler and more automatic. Currently, CSR, at least, requires SRAs to submit nomination slates on paper, but all of the documentation cannot be easily accessed or must be copied into Word documents. Further, the CSR CMO must often re-key information (or enter it from scratch) in order to meet their requirements.

This proposal, then, is an attempt to "dummy-proof" the system so that even SRAs can enter the needed data and have that data entered in such a way that CMO staff need not do further work with it.

1. SRG INFORMATION

        a. If the new system adopts the concept of a default meeting on logon, clicking on Nomination Slate should bring up the default SRG. An LOV for selecting a slate (needed especially for GTAs) should be limited to those in the GTAs/SRAs cluster (IRG) as in the Review Module.

        b. The list of potential retiring members should begin with vacancies and proceed from those closest to retirement to those (ACTIVE ONLY) members furthest from retirement.

        c. Those scheduled for retirement by the following July should have a checkbox with a check mark defaulted in. Unchecking a name should result in a query about extending the member for an additional year.

        d. A screen with "Worksheet" information should also be available to the SRA. This would allow potential problems with annual rotation, geographic balance, or females and minorities to be highlighted before submission of the slate.

2. INDIVIDUAL INFORMATION

        a. A "Build Slate" screen should bring in the identified individuals from above to a screen with a "Retiring Members" panel next to a "Nominees" panel.

        b. A Person Search button should allow the user to find and select an individual to fill in a highlighted spot in the Nominees panel.

        c. For each Nominee, a "Details" button would lead to a set of required fields. With luck, most of the required information would be pulled from the Profile in the Person database. Required data to include:

                1. Full name, including prefix & suffix
                2. Degrees (only higher level or RN, excluding dashes & blanks)
                3. Date of birth
                4. Titles (space for at least two)
                5. Department*
                6. College/School*
                7. University/Business* - **FROM IPF LOOKUP**
                8. Street Address*

      9. City, State, ZIP*
      10. E-mail
      11. Phone
      12. Fax
      13. Expertise/Competence (needs discussion - simplify)
      14. SSN
      15. Gender
      16. Ethnic status
      17. Minority status
      18. ROS address (with option to use Profile ROS information or to "build and edit from above data")#
      19. MLG address (with same option)#
      (20 - Birth place - can this be eliminated?)

* - NAMED FIELDS - see below
\# - While not required for a slate, SRAs would likely utilize this option for later use.

      d. If a Chair is retiring, that person should be in a separate block. In the nominee panel, a "Replacement Chair" block should appear, with an LOV to pull up active members to select the replacement. Check box if this will involve an extension for a fifth year.

      e. Ability to upload PDF files with bio sketches or cvs. User would need to make a choice and indicate the date the bio sketch or cv was submitted.

      f. Ability to add text to a "Research Support" field. Such information could include, for instance, year, grant number, title, and role AS SUBPROJECT PI on a P mechanism award (should be able to select the information from a search on the grant number only & have all but the Role information populate). Another example would be support from other federal agencies or voluntary organizations.

      g. Proposed term fields (start and end) defaulting to the following July 1 and defaulting to four years.

3. REPORTS

      a. Nominee Information List

      b. PAB including both current members and nominees

      c. Bio sketch or cv (from saved PDF)

      d. Research Support report including the added information

      e. Committee Service

      f. Worksheet

4. NAMED FIELDS

      a. Key to having this work will be using named fields as noted above. This will alert users to the need for exactly what information is required and it should also reduce the burden on CMO staff from dealing with incomplete information or information which needs to be re-arranged (e.g. Baylor School of Medicine instead of School of Medicine, Baylor University).

      b. Of particular importance is a named University/Business field with required IPF lookup. This will solve multiple problems.

5. SUBMISSION STATUS & HOLDS

      a. "SRA Work in Progress"

      b. "Submit to IRG Chief"

      c. "Submit to Division Director"

      d. "Submit to IC Director"

      e. "Submit to external ICs (CSR only)," with an LOV for selecting the interested ICs

      f. Other levels of approval as needed

      g. Check boxes for "Approved" with some form of built in verification

      h. Each Nominee should have a "Hold" radio button with a note that this action will prevent other users from nominating this individual - use with care.

Resolution:

- *Default meetings will be adopted.*

- *A new screen will be developed that will list all retiring members.*

- *User's will be able to select a replacement from a list of nominees that are on-hold or select a new person from the Person Screens. If a person is selected from the Person Screen, they will become a nominee on-hold. All necessary nominee information will be required to be entered at that time.*

- *Named fields are part of the People Redesign.*

- *For creating a slate, nominees that are on-hold are already listed on the 'Show Nominees' button. No change will be made here.*

- *No resolution on the chair.*

- *A new comment field will be added for additional research support. It will not be required.*

- *CV's will be attached to person records and will be handled in the People Redesign.*

- *A report will be developed so users can see the information. Ev will provide the specs.*

- *A free-form slate tracking workflow is available in CM now. CSR users can use the free-form tracking to track the additional slate tracking requirements.*

- *Retaining history for a reappointment will be researched by Logicon staff.*

11. Person Search (COM1100)

11.1 Profile Collapse

1. Users should be able to flag names for collapse of profiles by designated group (CMO) but not be able to collapse themselves. Additional personnel/overtime may be needed. Users need to be able to flag high priority collapse requests (e.g., putting a slate together) for one day turnaround. This requirement is item #118 on the spreadsheet. This item was discussed at the 12/12/01 meeting.

Resolution:

- *This item will be addressed in the People Redesign.*

2. Collapsing profiles needs to be made easier, more intuitive. Consensus that request to do so should go to CMO. This requirement is item #117 on the spreadsheet. This item was discussed at the 12/12/01 meeting.

Resolution:

- *QRC is investigating.*

3. Only CMO should be able to collapse profiles; however, input from SRAs may be required. For instance, some records only show a name and a grant number and grant title. The SRA may need to verify that the title matches the expertise of one person vs another with the same name. This requirement is item #119 on the spreadsheet. This item was discussed at the 12/12/01 meeting.

Resolution:

- *This item will be addressed in the People Screens redesign.*

4. Committee Management users do not have the ability to fix incorrect collapses of profiles. This requirement is item #120 on the spreadsheet. This item was discussed at the 12/12/01 meeting.

Resolution:

- *This item will be addressed in the People Screens redesign.*

- *Provide a second level of warning before allowing a collapse to be applied.*

11.2 Committee Service History

1. Committee Service to highlight individuals ineligible for SRG service (i.e., NAC member). This requirement is item #108 on the spreadsheet. This item was discussed at the 12/12/01 meeting.

Resolution:

- *This item will be addressed in the People Screens Redesign.*

2. Committee Service to show full SEP name AND SRA. This requirement is item #107 on the spreadsheet. This item was discussed at the 12/12/01 meeting.

Resolution:

- *This item will be addressed in the People Screens Redesign.*

3. Display role of person (e.g., Chair, Regular, Temp) in a Person search in the committee service history. This requirement is item #110 on the spreadsheet. This item was discussed at the 12/12/01 meeting.

Resolution:

- *If the user clicks on the service history, a hyperlink will display the role and meeting information.*

12. Person Involvement (COM1200)

12.1 Training and tighter business rules

Training needed at all levels regarding entering a new person to help reduce duplicate entries. Also, force checks against existing data. This requirement is item #112 on the spreadsheet. This item was discussed at the 12/12/01 meeting.

Statement:

- *This is not a redesign issue.*

12.2 LOV Button Disappearance

Need LOV buttons on all fields with distinct choices. LOV buttons seem to have vanished on several screens. This requirement is item #9 on the spreadsheet. This item was discussed at the 12/12/01 meeting.

Resolution:

- *This issue will be addressed during the People Screens Redesign.*

12.3 Employment / IPF Lookup

Items 1, 2 and 3 are the same issue. A single resolution is described below.

The Employment area is little used by Review folks. The IPF lookup from Review should be added to allow quick addition of this information. This would allow institution and state to appear on the Meeting Roster section of Meeting Data screen. This requirement is item #122 on the spreadsheet. These items were discussed at the 12/12/01 meeting.

1. Employment: Why are there a series of address types here? Do they copy to/from the other address fields? There seems to be a link to WRK addresses, but the function served (providing university/business address information for the President's annual report) could be served by requiring an IPF lookup before accepting a roster as being complete. This could be linked to a named field in the ROS address and could also provide information on state in the Meeting Roster block of the Meeting Data screen. The Employment radio button need not then be associated with a meeting Role and should be eliminated from the Meeting Screens. This requirement is item #54A on the spreadsheet.

2. Simplify entry of Employment information. If not required for role, this is a CMO function. This requirement is item #121 on the spreadsheet.

Resolution:

- *This item will be handled in the People Screens Redesign.*

- *The Peer Review IPF Module and Prospect Details will be considered during the People Redesign.*

- *Sweep the system and remove all profiles that do not have a role. These records are referred to as "orphaned records". This will be done in the People Screens Redesign.*

4. Employment: Academic Rank, Position Title, and Title in the main screen need coordination, simplification. This requirement is item #124 on the spreadsheet. This item was discussed at the 12/12/01 meeting.

Resolution:

- *This will be addressed in the People Screens Redesign.*

12.4 Drag and Drop

Need ability to drag and drop text when working with addresses. Likely useful on several screens. This requirement is item #14 on the spreadsheet. This item was discussed at the 12/12/01 meeting.

Resolution:

- *Mike will investigate.*

12.5 Named Fields

The following requirement is item #92- 96 on the spreadsheet. These items were discussed at the 12/12/01 meeting.

1. Use named fields for addresses.   Using named address fields opens the possibility of drastically simplifying the address situation. For instance, a reviewer's university address fields could include the set needed for a ROS address: Dept., School, University, City, State, Zip. By including building and room number, street address, phone, fax, and e-mail, an MLG address could be constructed. The HOM address would also be composed of some subset of these elements. Provide the ability to define an address based on a user-formatted configuration of named address fields. For example, there could be an address that would use a configuration of "all fields", or one that used "roster fields", or "US Mail fields". Since a window envelope is restricted to 5 lines, the solution would have to be creative to make sure all information was fit in. Provide for other items in the design. For example, a courier address could need a different zipcode from the one that had been entered for roster or US mailing purposes.   Restrict address types to a Person Address and an Application/Grant/Contract/Business Office address. For the former, allow primary address; an alternate mailing address (reviewers may have dual appointments at a VA hospital and a university, for example); and a residence address.

Statement:

- *Users must do data cleanup.*

Resolution:

- *Claire will bring up the People redesign at the next Project Team Meeting.*
- *These items will be addressed in the People Redesign.*

12.6 Additional Address Fields

Need more address fields to accommodate lengthy addresses. This requirement is item #98 on the spreadsheet. This item was discussed at the 12/12/01 meeting.

Resolution:

- *This will be addressed in the People Screens Redesign.*

12.7 Prevent Duplicate Person Entry

Check with Grants Management to find ways to avoid duplicate Person entry on, for instance, minority supplements or other actions. This requirement is item #114 on the spreadsheet. This item was discussed at the 12/12/01 meeting.

Resolution:

- *QRC is investigating. This issue will be addressed in the People redesign.*

2. Avoid entry of duplicate persons. For Receipt and Referral users who don't understand the science, and are under pressure to enter applications quickly, provide better tools. Implement a decision tree to guide entry clerks in determining whether or not a new person needs to be created in the system. This requirement is item #113 on the spreadsheet. This item was discussed at the 12/12/01 meeting.

Resolution:

- *QRC is investigating. This issue will be addressed in the People redesign.*

12.8 Copy changes from Role to Profile

Prompt users about copying changes back to Profile. This requirement is item #49 on the spreadsheet. This item was discussed at the 12/12/01 meeting.

Resolution:

- *As discussed in another requirement, we will allow users to update the profile from the role.   The current functionality is inconsistent.   The bottom half of the screen does not update the profile, only the top half. Allow for expertise to be copied to the profile from the role. Prompt the user before applying the changes.*

12.9 Person Data Cleanup

Clean up duplicates in Person data using contractor; will require periodic maintenance. This requirement is item #115 on the spreadsheet. This item was discussed at the 12/12/01 meeting.

Resolution:

- *QRC is investigating.*

2. Need on-going maintenance of People information to keep the data clean. This requirement is item #116 on the spreadsheet. This item was discussed at the 12/12/01 meeting.

Resolution:

- *QRC is investigating.*

12.10 E-Mail Addresses

1. The e-mail address window should be longer to enable viewing of long addresses. This requirement is item #99 on the spreadsheet. This item was discussed at the 12/12/01 meeting.

Resolution:

- *This issue will be addressed in the People Screens Redesign.*

2. Problems with e-mail fields in that editing is a problem. If entered in upper case, seems impossible to edit to lower. This requirement is item #100 on the spreadsheet. This item was discussed at the 12/12/01 meeting.

Resolution:

- *Research the 'init caps' functionality does not work on the e-mail address.*

- *Research the e-mail address field editing features.*

12.11 Ability to Edit

Related to simplifying navigation, make fields editable as much as possible, without requiring Edit buttons: Should be able to edit directly on the current COM1200 without having to click the Edit button. This requirement is item #15 on the spreadsheet. This item was discussed at the 12/12/01 meeting.

Resolution:

- *This issue will be address in the People Screens Redesign.*

12.12 Automatically Copy Addresses from Profile to the Role

The ROS, MLG, and RES addresses should automatically be copied to the Role if they exist in the Profile. This requirement is item #41 on the spreadsheet. This item was discussed at the 12/12/01 meeting.

Resolution:

- *When creating a new role, copy all addresses, expertise and employments from the profile to the role.*
- *Allow for "copy from role to profile" functionality.*

12.13 Degrees

Degrees: duplicates should not copy into role. This requirement is item #42 on the spreadsheet. This item was discussed at the 12/12/01 meeting.

Resolution:

- *No auto copy of degrees.*

2. Degrees : if higher level degree present, bachelors and masters should not copy. This requirement is item #43 on the spreadsheet. This item was discussed at the 12/12/01 meeting.

Resolution:

- *User must select what degrees to copy.*

3. Degrees: dashes should NEVER copy. This requirement is item #44 on the spreadsheet. This item was discussed at the 12/12/01 meeting.

Resolution:

- *Mike Goodman will do a sweep to remove dashes in degrees.*
- *Mike Goodman will do a sweep to remove records that contain only a dash.*

12.14 Expertise

2. Need discussion on expertise. How to handle updates made in Role so as to add new data, not wipe out old data, yet not have a proliferation of similar but slightly different entries in the Profile. This requirement is #128 on the spreadsheet. It was discussed at the 1/16/02 meeting.

Resolution:

- *This discussion is tabled until the People Redesign.*

12.15 Fed Debt Button

Is the Fed Debt button used for something? Not currently used by local CMO or review staff. If we are not supposed to use a person who has such a debt, this fact needs to be made known and the presence of a Federal Debt needs to be flagged and/or the person needs to be blocked from being added to rosters, slates, or Prospect lists. Otherwise, suggest moving, hiding, or deleting the button. This requirement is item #48 on the spreadsheet. This item was discussed at the 12/12/01 meeting.

Statement:

- *The Fed Debt is a SREA issue.*

- *It is not being used now. It may have use in the future.*

Resolution:

- *If Fed Debt is set to yes, display a message stating that the person cannot be place on a roster or have a nomination/appointment created, whichever is applicable.*

- *Do a sweep to see how many records have a fed debt of yes. On 12/18/01, 27 records were 'Y', 18,456,551 were 'N' and 1163 were null.*

12.16 Address Types

Some address "types" are really roles, and should be removed. This requirement is item #97 on the spreadsheet. This item was discussed at the 12/12/01 meeting.

Resolution:

- *This issue will be addressed in the People Screens Redesign.*

12.17 Default Country Code to 231

Default the Country Code to 231 for all addresses, or tie to entry of state field or Canadian province. This requirement is item #101 on the spreadsheet. This item was discussed at the 12/12/01 meeting.

Resolution:

- *This issue will be addressed in the People Screens Redesign.*

12.18 Format Mask for phone and fax

Phone and Fax should be masked so that users only need to input digits without having to worry about parenthesis and dashes. Provide new field for foreign, or clear masking if country other than US or

Canada. This requirement is item #102 on the spreadsheet. This item was discussed at the 12/12/01 meeting.

Resolution:

- *Non-Us phone format is different than US. Research the possibility of changing the format mask depending on the country entered. This will be addressed in the People Redesign.*

12.19 Allow Dash in Zipcode

Allow dash in ZIP code. This requirement is item #102 on the spreadsheet. This item was discussed at the 12/12/01 meeting.

Resolution:

- *Zip code format varies from country to country. Research the possibility of changing the format mask depending on the country entered. This will be addressed in the People Redesign.*

12.20 Viewing Different Address Types

For Addresses, would like radio buttons to be able to view different addresses without having to open and close windows. Or a symbol to move to the next address type. This requirement is item #104 on the spreadsheet. This item was discussed at the 12/12/01 meeting.

Resolution:

- *This issue will be handled in the People Screens Redesign.*

Would like to have a list of all the different addresses rather than having to click on Edit to view the different types. (Similar to Adv Person Search screen in Review. This requirement is item #105 on the spreadsheet. This item was discussed at the 12/12/01 meeting.

Resolution:

- *This issue will be handled in the People Screens Redesign.*

12.21 Person Address Copy

Person Address: Copy to clipboard to include title, degree, city, state, zip, option for phone, fax, e-mail. This requirement is item #106 on the spreadsheet. This item was discussed at the 12/12/01 meeting.

Resolution:

- *Copy all information. Currently, not all data is being copied.*

12.22 Delete Change Code Functionality

Universally despised and held to be useless. This requirement is item #4 on the spreadsheet. This item was discussed at the 1/9/02 meeting. This item was discussed at the 12/12/01 meeting.

Resolution:

- *This item is needed for auditing purposes. A suggestion was made to allow for entry of the change code on the pop-up screen that notifies a user that a change code must be entered. This will be discussed at the during the People Redesign.*

12.23 SSN Validation

SSN needs to be input and need to check to be sure it isn't all zeros or all nines, etc. This edit check should key on the country code. If not USA, ignore SSN field. "Voucher validated" must be checked. Voucher should not print if these issues not satisfied. This is requirement #82 on the spreadsheet. This item was discussed at the 1/16/02 meeting.

Resolution:

This item will be discussed during the People Redesign.

12.24 Checklist Data

Person Administration: Eliminate/modify checklist data - reduce to four questions - human, animal, molecular, cell tissue culture - and move these to expertise fields. Add "Clinical." These fields are not used by CSR CMO.

Resolution:

   Sara Silver will research and e-mail Krishna Collie.

12.25 TSO Status Report

TSO "Status" type information for a person. Ability to restrict to type 1, 2, or 3. Ability to select restricted data set (e.g., name, appl #, council, rec, score, %, award code, title, univ, bud period) or full data set. Perhaps customizeable by user. This is item #130 on the spreadsheet. It was discussed at the 1/16/02 meeting.

The following is a sample TSO Status Report.

```
IWAMOTO, GARY A                 1K04HL01910-01      CNCL: 10-86  MULTI: NS

WITHDRAWN BY ICD - REVISED APPLICATION RECEIVED
UNIVERSITY OF TEXAS SW MED CTR/DALLAS     DALLAS, TEXAS
EXERCISE PRESSOR RESPONSES AND THE BRAINSTEM                        FRM NO

IRG DATA: RG RAP   REC: APPROVAL    PR SC 169                           SS ON HIST
CNCL DATA: 10-86  REC: CF           PGM CL HHWH5    DUAL PGM CL    DN     B
SS 532-52-4540         DEG PHD         NRS CD N HM SB 10 AN SUB 30   MIN CD   GEN CD
PH:    EMAIL:    FAX:
PROJ 12/01/86 - 11/30/91     BUDG 12/01/86 -  / /  FY 87


IWAMOTO, GARY A                 1K04HL01910-01A1    CNCL: 05-87  MULTI:

AWARD TERMINATED ON 01/88
UNIVERSITY OF TEXAS SW MED CTR/DALLAS     DALLAS, TEXAS
EXERCISE PRESSOR RESPONSES AND THE BRAINSTEM                        FRM NO

IRG DATA: RG RAP   REC: APPROVAL    PR SC 124                           SS ON HIST
CNCL DATA: 05-87  REC: CF           PGM CL HHWH5    DUAL PGM CL
SS 532-52-4540         DEG PHD         NRS CD  HM SB 10 AN SUB 30   MIN CD   GEN CD
PH:    EMAIL:    FAX:
PROJ 09/01/87 - 01/31/88     BUDG 09/01/87 - 01/31/88 FY 87ENC DATE 01/28/88


IWAMOTO, GARY A                 7K04HL01910-02      CNCL: 00-87  MULTI:

AWD  29,746      (DIR 27,543)     4  FUT YRS
UNIVERSITY OF ILLINOIS URBANA-CHAMPAIGN   CHAMPAIGN, ILLINOIS
EXERCISE PRESSOR RESPONSES AND THE BRAINSTEM                FRM NO 1K04HL01910-01A1

IRG DATA: RG RAP (INT)   REC: NO ACT                              SS NOT AVAIL
CNCL DATA: 00-87  REC:              PGM CL HHWH5    DUAL PGM CL
SS 532-52-4540         DEG PHD         NRS CD  HM SB 10 AN SUB 30   MIN CD   GEN CD
PH:    EMAIL:    FAX:
PROJ 02/01/88 - 08/31/92     BUDG 02/01/88 - 08/31/88 FY 87ENC DATE 01/28/88
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IWAMOTO, GARY A                5K04HL01910-03       CNCL: 00-88   MULTI:

AWD  48,253      (DIR 44,679)      3  FUT YRS
UNIVERSITY OF ILLINOIS URBANA-CHAMPAIGN    CHAMPAIGN, ILLINOIS
EXERCISE PRESSOR RESPONSES AND THE BRAINSTEM                           FRM NO 1K04HL01910-01A1

IRG DATA: RG RAP   REC: NO ACT                                              SS NOT AVAIL
CNCL DATA: 00-88  REC:                   PGM CL HHWH5      DUAL PGM CL
SS 532-52-4540          DEG PHD          NRS CD   HM SB 10 AN SUB 30    MIN CD    GEN CD
PH:    EMAIL:    FAX:
PROJ 02/01/88 - 08/31/92      BUDG 09/01/88 - 08/31/89 FY 88ENC DATE 08/01/88


IWAMOTO, GARY A                5K04HL01910-04       CNCL: 00-89   MULTI:

AWD  47,865      (DIR 44,319)      2  FUT YRS
UNIVERSITY OF ILLINOIS URBANA-CHAMPAIGN    CHAMPAIGN, ILLINOIS
EXERCISE PRESSOR RESPONSES AND THE BRAINSTEM                           FRM NO 1K04HL01910-01A1

IRG DATA: RG RAP   REC: NO ACT                                              SS NOT AVAIL
CNCL DATA: 00-89  REC:                   PGM CL HHWH5      DUAL PGM CL
SS 532-52-4540          DEG PHD          NRS CD   HM SB 10 AN SUB 30    MIN CD    GEN CD
PH:    EMAIL:    FAX:
PROJ 02/01/88 - 08/31/92      BUDG 09/01/89 - 08/31/90 FY 89ENC DATE 08/09/89


IWAMOTO, GARY A                5K04HL01910-05       CNCL: 00-90   MULTI:

AWD  59,844      (DIR 55,411)      1  FUT YRS
UNIVERSITY OF ILLINOIS URBANA-CHAMPAIGN    CHAMPAIGN, ILLINOIS
EXERCISE PRESSOR RESPONSES AND THE BRAINSTEM                           FRM NO 1K04HL01910-01A1

IRG DATA: RG RAP   REC: NO ACT                                              SS NOT AVAIL
CNCL DATA: 00-90  REC:                   PGM CL HHWH5      DUAL PGM CL
SS 532-52-4540          DEG PHD          NRS CD   HM SB 10 AN SUB 30    MIN CD    GEN CD
PH:    EMAIL:    FAX:
PROJ 02/01/88 - 08/31/92      BUDG 09/01/90 - 08/31/91 FY 90ENC DATE 07/13/90


IWAMOTO, GARY A                5K04HL01910-06       CNCL: 00-91   MULTI:

AWD  62,499      (DIR 57,869)      0  FUT YRS
UNIVERSITY OF ILLINOIS URBANA-CHAMPAIGN    CHAMPAIGN, ILLINOIS
EXERCISE PRESSOR RESPONSES AND THE BRAINSTEM                           FRM NO 1K04HL01910-01A1

IRG DATA: RG RAP   REC: NO ACT                                              SS NOT AVAIL
CNCL DATA: 00-91  REC:                   PGM CL HHWH5      DUAL PGM CL
SS 532-52-4540          DEG PHD          NRS CD   HM SB 10 AN SUB 30    MIN CD    GEN CD
PH:    EMAIL:    FAX:
PROJ 02/01/88 - 08/31/92      BUDG 09/01/91 - 08/31/92 FY 91ENC DATE 08/13/91


IWAMOTO, GARY A                1R01HL37400-01       CNCL: 10-86   MULTI: NS

AWARD TERMINATED ON 04/88
UNIVERSITY OF TEXAS SW MED CTR/DALLAS     DALLAS, TEXAS
EXERCISE PRESSOR RESPONSES AND THE BRAINSTEM                           FRM NO

IRG DATA: RG RAP   REC: APPROVAL   PR SC 158 PCTL  31.5  REF CD 1         SS ON HIST
CNCL DATA: 10-86  REC: CF                PGM CL HHFU6      DUAL PGM CL    DN     B
SS 532-52-4540          DEG PHD          NRS CD N HM SB 10 AN SUB 30    MIN CD
IWAMOTO, GARY A                1R01HL37400-01A1     CNCL: 10-87   MULTI:

WITHDRAWN BY INVESTIGATOR ON 08/87
UNIVERSITY OF TEXAS SW MED CTR/DALLAS     DALLAS, TEXAS
EXERCISE PRESSOR RESPONSES AND THE BRAINSTEM                           FRM NO

IRG DATA: RG RAP   REC: APPROVAL   PR SC 130 PCTL                        SS ON HIST
CNCL DATA: 10-87  REC:                   PGM CL HHFU6      DUAL PGM CL
SS 532-52-4540          DEG PHD          NRS CD   HM SB 10 AN SUB 30    MIN CD    GEN CD
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PH:    EMAIL:   FAX:
PROJ 12/01/87 - 11/30/92     BUDG 12/01/87 -   / /   FY 88


IWAMOTO, GARY A              7R01HL37400-02      CNCL: 00-88  MULTI:

AWD  39,886     (DIR 27,986)    2  FUT YRS
UNIVERSITY OF ILLINOIS URBANA-CHAMPAIGN   CHAMPAIGN, ILLINOIS
EXERCISE PRESSOR RESPONSES AND THE BRAINSTEM                 FRM NO 1R01HL37400-01

IRG DATA: RG RAP (INT)   REC: NO ACT                              SS NOT AVAIL
CNCL DATA: 00-88  REC:              PGM CL HHFU6     DUAL PGM CL
SS 532-52-4540        DEG PHD        NRS CD   HM SB 10 AN SUB 30   MIN CD   GEN CD
PH:    EMAIL:   FAX:
PROJ 02/01/88 - 08/31/90     BUDG 02/01/88 - 08/31/88 FY 87ENC DATE 04/21/88


IWAMOTO, GARY A              5R01HL37400-03      CNCL: 00-88  MULTI:

AWD  72,087     (DIR 45,735)    1  FUT YRS
UNIVERSITY OF ILLINOIS URBANA-CHAMPAIGN   CHAMPAIGN, ILLINOIS
EXERCISE PRESSOR RESPONSES AND THE BRAINSTEM                 FRM NO 1R01HL37400-01

IRG DATA: RG RAP   REC: NO ACT                                    SS NOT AVAIL
CNCL DATA: 00-88  REC:              PGM CL HHFU6     DUAL PGM CL
SS 532-52-4540        DEG PHD        NRS CD   HM SB 10 AN SUB 30   MIN CD   GEN CD
PH:    EMAIL:   FAX:
PROJ 02/01/88 - 08/31/90     BUDG 09/01/88 - 08/31/89 FY 88ENC DATE 08/23/88


IWAMOTO, GARY A              5R01HL37400-04      CNCL: 00-89  MULTI:

AWD  65,890     (DIR 42,177)    0  FUT YRS
UNIVERSITY OF ILLINOIS URBANA-CHAMPAIGN   CHAMPAIGN, ILLINOIS
EXERCISE PRESSOR RESPONSES AND THE BRAINSTEM                 FRM NO 1R01HL37400-01

IRG DATA: RG RAP   REC: NO ACT                                    SS NOT AVAIL
CNCL DATA: 00-89  REC:              PGM CL HHFU6     DUAL PGM CL
SS 532-52-4540        DEG PHD        NRS CD   HM SB 10 AN SUB 30   MIN CD   GEN CD
PH:    EMAIL:   FAX:
PROJ 02/01/88 - 05/31/92     BUDG 09/01/89 - 05/31/92 FY 89ENC DATE 08/15/89


IWAMOTO, GARY A              2R01HL37400-05      CNCL: 01-92  MULTI:

WITHDRAWN BY ICD - REVISED APPLICATION RECEIVED
UNIVERSITY OF ILLINOIS URBANA-CHAMPAIGN   CHAMPAIGN, ILLINOIS
EXERCISE PRESSOR RESPONSES AND THE BRAINSTEM                 FRM NO 1R01HL37400-01

IRG DATA: RG RAP   REC: APPROVAL   PR SC 174 PCTL  28.7  REF CD 1         SS ON HIST
CNCL DATA: 01-92  REC: CF           PGM CL HHFE5     DUAL PGM CL
SS 532-52-4540        DEG PHD        NRS CD   HM SB 10 AN SUB 30   MIN CD 70 GEN CD 60
PH:    EMAIL:   FAX:
PROJ 02/01/88 - 03/31/96     BUDG 04/01/92 -   / /   FY 92


IWAMOTO, GARY A              2R01HL37400-05A1    CNCL: 10-92  MULTI:

AWD  78,747     (DIR 55,311)    3  FUT YRS
UNIVERSITY OF ILLINOIS URBANA-CHAMPAIGN   CHAMPAIGN, ILLINOIS
EXERCISE PRESSOR RESPONSES AND THE BRAINSTEM                 FRM NO 1R01HL37400-01

IRG DATA: RG RAP   REC: APPROVAL   PR SC 151 PCTL  20.6  REF CD 1         SS ON HIST
CNCL DATA: 10-92  REC: CF           PGM CL HHFE5     DUAL PGM CL
SS 532-52-4540        DEG PHD        NRS CD   HM SB 10 AN SUB 30   MIN CD 70 GEN CD 60
PH:    EMAIL:   FAX:
PROJ 02/01/88 - 12/31/96     BUDG 01/01/93 - 12/31/93 FY 93ENC DATE 12/29/92


IWAMOTO, GARY A              2R01HL37400-05A2    CNCL: 05-93  MULTI:
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WITHDRAWN BY ICD - PREVIOUS APPLICATION AWARDED
UNIVERSITY OF ILLINOIS URBANA-CHAMPAIGN   CHAMPAIGN, ILLINOIS
EXERCISE PRESSOR RESPONSES AND THE BRAINSTEM                         FRM NO 1R01HL37400-01

IRG DATA: RG RAP   REC: NO ACT                                   SS NOT AVAIL
CNCL DATA: 05-93  REC:                 PGM CL HHFE5    DUAL PGM CL
SS 532-52-4540          DEG PHD         NRS CD   HM SB 10 AN SUB 20   MIN CD 70 GEN CD 60
PH:    EMAIL:   FAX:
PROJ 02/01/88 - 06/30/98     BUDG 07/01/93 -  / /   FY 93


IWAMOTO, GARY A              5R01HL37400-06      CNCL: 00-93  MULTI:

AWD  74,342      (DIR 48,542)    2  FUT YRS
UNIVERSITY OF ILLINOIS URBANA-CHAMPAIGN   CHAMPAIGN, ILLINOIS
EXERCISE PRESSOR RESPONSES AND THE BRAINSTEM                         FRM NO 1R01HL37400-01

IRG DATA: RG RAP   REC: NO ACT   PR SC 151 PCTL  20.6  REF CD 1       SS NOT AVAIL
CNCL DATA: 00-93  REC:                 PGM CL HHVL N    DUAL PGM CL
SS 532-52-4540          DEG PHD         NRS CD   HM SB 10 AN SUB 30   MIN CD 70 GEN CD 60
PH:    EMAIL:   FAX:
PROJ 02/01/88 - 12/31/96     BUDG 01/01/94 - 12/31/94 FY 94ENC DATE 01/14/94


IWAMOTO, GARY A              5R01HL37400-07      CNCL: 00-94  MULTI:

AWD  66,543      (DIR 40,916)    1  FUT YRS
UNIVERSITY OF ILLINOIS URBANA-CHAMPAIGN   CHAMPAIGN, ILLINOIS
EXERCISE PRESSOR RESPONSES AND THE BRAINSTEM                         FRM NO 1R01HL37400-01

IRG DATA: RG RAP   REC: NO ACT   PR SC 151 PCTL  20.6  REF CD 1       SS NOT AVAIL
CNCL DATA: 00-94  REC:                 PGM CL HHVL N    DUAL PGM CL
SS 532-52-4540          DEG PHD         NRS CD   HM SB 10 AN SUB 30   MIN CD 70 GEN CD 60
PH:    EMAIL:   FAX:
PROJ 02/01/88 - 12/31/96     BUDG 01/01/95 - 12/31/95 FY 95ENC DATE 12/22/94


IWAMOTO, GARY A              5R01HL37400-08      CNCL: 00-95  MULTI:

AWD  84,512      (DIR 47,399)    0  FUT YRS
UNIVERSITY OF ILLINOIS URBANA-CHAMPAIGN   CHAMPAIGN, ILLINOIS
EXERCISE PRESSOR RESPONSES AND THE BRAINSTEM                         FRM NO 1R01HL37400-01

IRG DATA: RG RAP   REC: NO ACT   PR SC 151 PCTL  20.6  REF CD 1       SS NOT AVAIL
CNCL DATA: 00-95  REC:                 PGM CL HHVL N    DUAL PGM CL
SS 532-52-4540          DEG PHD         NRS CD   HM SB 10 AN SUB 30   MIN CD 70 GEN CD 60
PH: (217) 333-2506  EMAIL:   FAX:
PROJ 02/01/88 - 12/31/99     BUDG 01/01/96 - 12/31/99 FY 96ENC DATE 02/07/96
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Resolution:

> *CMUG declined adding it to CM. Ev will bring it up at the RUG.*

12.26 Status and Committee Service

"Status" and committee service to appear on same screen. This is issue #131 on the spreadsheet. This was discussed at the 1/16/02 meeting.

Resolution:

This item will be discussed during the People Redesign.

12.27 Sensitive Information

Need discussion on sensitive info such as SSN and RES/VCH address information. Some feel too much is open for potential illegal use. Others feel risk is low and reviewers willing to shoulder risk rather than have to fill in info on vouchers. SREA cannot enter? Does RES = VCH?. This is item #132 on the spreadsheet. This item was discussed at the 1/16/02 meeting.

Resolution:

This issue has been discussed at a higher level. It was decided that anyone with standard access can see this information.

12.28 Meaning of W/D

Person Involvement Sensitive: What does W/d mean? It seems to clear the next field, but why have it?. This is item #133 on the spreadsheet. It was discussed at the 1/16/02 meeting.

Resolution:

W/d means withheld. It is needed to indicate withheld information. It may be a labeling issue.

12.29 Race Sub Type

Person Involvement Sensitive: Do we need race subtype?.   This is item #134 on the spreadsheet. It was discussed at the 1/16/02 meeting.

Resolution:

This item will be discussed during the People Redesign.

12.30 Birthdate and Birthplace

Birthdate and (especially) birthplace - are these ever used? Could either be eliminated?.   This is item #135 on the spreadsheet. It was discussed at the 1/16/02 meeting.

Resolution:

> *Both are used in CM. It is required for certain slates.*

12.31 Disability Sub Type

Do we need a Disability subtype? This is item #136 on the spreadsheet. It was discussed at the 1/16/02 meeting.

Resolution:

> *This item will be discussed during the People Redesign.*

12.32 Person Titles

COM1200-Person Involvement:Temporary members need consistent titles. This is item #137 on the spreadsheet.

Pull down entry of Person titles, with text modification of field. Some NIH wide reports ask for an analysis of full, Assoc., or Asst. Profs. This data is not readily available. Consider button entry of these into Person title field to satisfy this need, then allow text entry around the title, e.g., Professor of Physiology. Link to the current Employment fields as needed. This is item #138 on the spreadsheet.

Some reviewers request/provide more than one title. Two or three fields should be allowed. This is item #139 on the spreadsheet.

Items 137, 138 and 139 were discussed at the 1/16/02 meeting.

Suggestion:

Provide an LOV with common titles and a text field so users can add to that title. For example, from the LOV, a user might select 'Professor', then in the text field add 'of Psychology'.

Resolution:

> *This item will be discussed during the People Redesign.*

12.33 Availability Status Code

Deceased field - easily identified both for entry and subsequent scanning; block from appearing on Advanced Person Search hit lists. This is item #140 on the spreadsheet. It was discussed at the 1/16/02 meeting.

Discussion:

Seeing that a person is deceased needs to be more visible. It appears this LOV mixes apples and oranges.

Resolution:

> *This item will be discussed during the People Redesign.*