Electronic 901 Working Group Minutes

Date:	Friday May 06, 2005
Time:	1:00–3:00 p.m.
Location:	Rockledge 1, 5th, Room 5147
Advocate:	Ellen Liberman

Next Meeting: Tuesday, May 17, 2005. Location RKL 1, Room 2198

Change Request Prototype Page: http://erawebdev.od.nih.gov/UI/e901/index.asp

Action Items

1. (Daniel Fox) Add "Delete" action item to the list of actions within Web QT to submit Delete Application requests and move it to the bottom of the list to prevent user errors in accidentally submitting the Delete Requests.

2. (Lana Diggs) Distribute the new IRG/Review Chief role definition.

3. (Lana Diggs) Provide a list of all eRequests at the next meeting.

4. (Daniel Fox) Update the Assignment Change, Withdrawal, Reinstatement, and Deletion Requests Routing Table based on suggested changes by the group.

Documents

1. Assignment Change, Withdrawal, Reinstatement and Deletion Requests Routing Table

2. Assignment Change Request eMail Notifications

Review Action Items from Last Meeting

Lana began the meeting by going over the action items from last week:

1. *(Daniel Fox) Write a warning message informing the user that scores will be removed should they proceed with an IRG Deferral change -* Daniel is currently working on this.

2. *(Lana Diggs) Test the current functionality in the R&R module –* Lana spoke to Leah Roberts and found out that there is no way to retain scores except to ask Jim Tucker to make the changes and retain scores at the same time.

3. *(Daniel Fox) Talk to ICO to determine whether or not IRG deferral and Council Deferral can be lumped together under IRG deferral –* This issue has been resolved.

4. *(Daniel Fox) Enhance Web QT to allow for search on Deleted Applications –* Daniel reminded the group that they agreed that there should be a way to see deleted applications.

5. Users will need a feature of changing Delete Application Requests to to "Withdraw." This feature will only be available to the Department of Receipt and Referral (DRR)

Chief. The return notification will show that this action is completed. The request type will also change based on this modification.

Daniel also added a "Request History" action item to the drop down list of action items within Web QT. Once selected, users will be shown a list of Requests (just like on Track Requests Hitlist) for the selected application.

Action: (Daniel Fox) Add "Delete" action item to the list of actions within Web QT to submit Delete Application requests and move it to the bottom of the list to prevent user errors in accidentally submitting the Delete Requests.

Lana said that Daniel defined the Integrated Review Group (IRG)/Review Chief role from the last meeting. Lana will distribute that role shortly.

Action: (Lana Diggs) Distribute the new IRG/Review Chief role definition.

Lana also reminded the group that the next (and final) meeting will be held on May 17. After the end of these meetings, a limited pilot will be released in October or November of this year. anticipates that full functionality should be available by this time next year.

> *Q. How will the eRequest feature begin and who will be represented in them?*
>
> *A. Right now, eRequests have the following features: Just In Time (JIT), Electronic Streamlined Non-Competing Award Process (eSNAP), and electronic corrections to the Electronic Competing Grant Application process (eCGAP). Lana will provide a list of all eRequests at the next meeting.*

Action: (Lana Diggs) Provide a list of all eRequests at the next meeting.

Review Routing Table

Daniel handed out and went over a routing table illustrating request routing. The provided cover page includes explanations and definitions, mostly for the benefit of developers. One addition to this page is to include an error message when users do not blank out fields, but check the decline box for Refer back to DRR requests. In other words, relevant justification is mandatory for declines and blanked out fields. Also, under the "Additional Explanations" section, the IRG/Review Chief definition will read, "The chief of the IRG Cluster to which application is being assigned (based on administering IC of the Cluster)."

Daniel then reviewed the routing table he provided, and the group made the following comments, suggestions, changes and additions:

- Daniel explained that the table reads from top to bottom. For example, in the first entry, *Council Change (applications within CSR Review)*, the approval chain is as follows: **All Allowable Users → IRG/Review Chief → DRR Chief.** The rest of the columns read in the same manner.

- *Request Status* – This is the status that the user sees on the request. This and the *Action Label* do not exist before the user submits a request. When a Council Change is submitted, there will be a notification that says "initiated." The system will recognize that all IRG Chiefs will have Scientific Review Administrator (SRA) roles, since it will only deal with those pertinent to this process.

- Suzanne Fisher reminded the group that when a Referral Officer assigns an application, it goes into a three day holding pattern in which no 901 change request is needed.

- *Grant # (Excluding IC) Change* and *Grant # (Excluding IC) and Dual IC Change* – Remove "except use IC of the grant (not review) to locate approval chain users." These request types act *exactly* like a Council Change.

- *Withdraw* – If the application goes through Center for Scientific Review (CSR), then it goes through an IRG Chief on the approval chain; however, if it goes through an IC review, then it goes for Referral Liaison (RL) approval. On the table, "Program Official" (PO) will be replaced with "IRG Chief or RL."

- *Delete* – Deletions have the same approval chain as Withdrawals.

Action: (Daniel Fox) Update the Assignment Change, Withdrawal, Reinstatement, and Deletion Requests Routing Table based on suggested changes by the group.

Notifications

Daniel went over the "Assignment Change Request Email Notifications" document that he provided the group. There are three basic categories that this form deals with: Submission, Assignment and Completion, all of which are explained on the first page. The group made the following comments, suggestions, changes and additions:

Notice Type

- These notifications should be no longer than is needed. It would be more user-friendly if scrolling is not necessary.

- *Submission* – There should be no notification for this step. It should be removed. *Assignment* will thus be the first trigger for notification.

- *Notification Opt-Out* – There should be both a capability to receive email notification as well as one to opt-out of emails. This will prevent notification inundation within a user's queue.

- *Completion* - This notification will not be sent to any additional role. It will also not be sent to the DRR Chief.

Notice Content

- *Subject Line* – This will read, "Assignment: Change Request, Grant #, PI or Mass Change Request." The Assignment Change Request will be shortened to *ACR*.

- *Email Text* - This will be an automated text.

- *Grant Information* – This will be changed to "*Original* Grant Information." "Request Submission Note" will be removed to prevent redundancy. The "Please Do Not Respond to this Automatically Generated Email" will be moved to the bottom of the email.

- *Request Information* – The group agreed that the Request Type should be at the top and should be both in the email and the subject line.

- *Mass Change Request* – The list of applications will be included within this email. The Request Type will be in this format: "Mass IRG Change." Request changes should not show lumped-together 901s; they should be singularly submitted. The "Please Do Not Respond to this Automatically Generated Email" will be moved to the bottom of the email.

- A Mass Dual IC Change and a Mass Primary IC Change must be added, since these are exemplary uses of a Mass Request change. These will be enhanced at a later date.

- *901 Routing* – These changes will follow the same rules and have the same gate keepers as non-mass IRG/Council change.

- *Completion Email* – These will follow the same format as the assignment change request, but will include the word "completed."

Lana stated that the next meeting will be a review as well as a celebration of the end of meetings.

Attendees

Diggs, Lana	Edwards, Michael	Fisher, Suzanne	Fox, Daniel
Melchior, Christine	Noronha, Jean	Paugh, Steven	Stesney, Jo Ann