Update: eRA Program Module (PGM)

http://apps.era.nih.gov/pgm

Advocates: Carlos Caban, Israel Lederhendler

Analysts: Chanath Ratnanather, Cathy Walker

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Program Portal JAD 09/2001-08/2002

Co-Chairs

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- Carlos Caban, OER

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- Richard Fisher, NEI
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eRA Program Users Group (e-PUG) Program Module, 08/2002-

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- Bud Erickson, NCI (to 4/03)
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- Carol Martin, NHGRI

Outline

- Brief Review of the Program Module
  - Basic design goals
  - Operations
- Summer 2003 Release Features
- Demonstration
- Future Release Features

Basic Design Goals

- A coherent intuitive environment that allows Program Officials (PO) to do their work

- At sign-on provides access to a PO's portfolio of grant applications and awards

- The data is distributed across the grant life cycle and automatically updated

- Easy access to information about any grant at NIH (to respond to an immediate inquiry)

- Links to other eRA/NIH functional areas

- Hierarchical and team-oriented approach to sharing data

Operations

- A WEB-BASED eRA MODULE FOR PROGRAM STAFF THAT DOES BOTH TRANSACTIONS AND REPORTS

- Works through access to the On-Line Transaction Processing (OLTP) database for real time data

- Collaboration with the eRA Program Users Group (e-PUG) for input and requirements

- Training is facilitated via an IC-based "lead users" concept

- Possible template for other functional area modules

Summer '03 Release Features - 1

- SEARCH capability on PI Name and/or grant#
  - Search = default menu tab
- A PO's portfolio distributed into grant cycle pages
  - Filter/Sort of portfolio lists by FY, Council Date, PCC, & Subprojects
  - Portfolio lists exportable to Excel
- For each grant in a PO's portfolio, access to
  - eRA Grant Folder
  - eRA Grant Snapshot (v2.0)
  - Program Checklists
  - Program Approval (sign-off & sign-off notes)
  - View/update PO Notes, view historical notes
  - Attention Flag showing concerns

Summer '03 Release Features – 2

- Include/Exclude grants not assigned to a PO.
  - For tracking/interest purposes, include a grant assigned to another PO anywhere in NIH
- Save the PO-preferred Sort as the Default
- eRA Reports: PO Worksheet, Master List of Applications, and SRG Agenda
- Expand/collapse sections of eRA Grant Snapshot
- Integration with new shared eRA modules
  - eRA Checklists
  - eRA Web QT

Demo

- Scenario: What grants are up for review?
- Scenario: The telephone call from a PI
- Scenario: Which type 5s need to be processed?

Major Fall and Future Planned Features

- New Program Approvals page

- Read only access to any PO's portfolio at NIH

- Program assistant/Program analyst roles

- Delegation and Organizational Layers (presented previously, but:

  - a few points to emphasize

    - access to view grants of all the PO's assigned to supervisory and program assistant roles to begin to reflect real-world practice

    - colleague/peer access to perform transactions, on grants of all the PO's within his/her designated "organization layer" to begin the electronic facilitation of teams