



## Workgroup on Extramural Training Systems (WETS)

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**Date:** January 13, 2005

**Time:** 10:00 a.m.–11:30 a.m.

**Location:** Rockledge 1, Room 3502

**Advocates:** Barbara Huffman, Rick Ikeda, (Dr. Walter Schaffer)

**Next Meeting:** February 10, 2005, 10 a.m.–Noon, Rockledge 1, Room 3502

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### Action Items

1. (All) Draw up WETS charter and define goals
2. (Linda Katzper) Work with Cassandra Spears on creating an overall list of backlogged terminations by IC.
3. (Chris Myers) Meet with Walter Schaffer to discuss problem of backlogged terminations at ICs snowballing into a gigantic issue for the centralized Payback Center. Suggest terminating the records by proxy.

### Training Activities enhancements update

Linda Katzper (acting as chair in Rick Ikeda's absence) stated that there is a lengthy list of enhancements for the Training Activities module but they have not been deployed because some defects are still being corrected. TA is a module supporting NIH's National Research Service Award (NRSA) business operations for processing appointments, terminations, and payback obligations. The list of enhancements include (with status):

- Problem with round on snapshot report (in integration testing)
- Payback snapshot report needs Loan Repayment Program (LRP) dates (integration testing)
- When a person has status of 103, or 102 and it is paid back, there should be an easy way to recalculate (integration testing)
- Text added to Balance Due Worksheet, reflecting the precise date the NIH Revitalization Act was passed in 1993 (integration testing)
- Disable user use of LRP dates on User Interface (integration testing)
- Disable Discipline Specialty Field (DSF) codes (acceptance testing)
- LRP trigger for when dates change (acceptance testing)
- Add Field of Training (FOT) codes to reappointment (acceptance testing)
- The roles for the centralization of all payback functions at the NIH NRSA Payback Service Center under the Office of Extramural Research, Office of the Director, will be

tested soon. Linda Katzper stated that some people will be deleted from the roles and others added on.

## **X-Train development update**

Tatiana Khramkova demonstrated the prototype for termination functionality. She walked the group through the process for the termination of a trainee, explaining the built-in notifications to alert people involved that action needs to be taken.

### ***On the Training Appointment page, the Program Director:***

- Has the option of terminating or reappointing a trainee.
- If he or she terminates the trainee, he or she has the ability to change the end date, change number of months and dates and adjust the amount of stipend within a certain threshold.

### ***The trainee has several options:***

- Cannot change the amount of stipend or months of training.
- Has to put in text as to what he plans to do after training.
- If the trainee says they have to be reappointed, they can indicate that and return the notice to the Program Director.
- If the trainee disagrees with the amount of stipend, they can also return the notice to the Program Director by clicking on a button.
- If the trainee accepts the termination, they click a button that says “Sign and notes to Program Director.”
- If the trainee does nothing, it goes back to the Program Director, who then sends it to the Signing Official who sends it to NIH.

### ***The Business Official (Signing Official):***

- Can say the termination notice was wrong and send the notice to the Program Director or NIH
- If the Business Official does not respond, the notice goes to NIH, where an official can do a proxy termination.

**Discussion:** Chris Myers stated that the notification could pose problematic in cases where there are multiple trainees per grant and officials will be bombarded by two or three emails per trainee. Linda Katzper reassured him that the plan is for e-notifications to notify the Program Director of all terminations in bulk every 30 to 60 days and not in a slew of emails.

## **TA J2EE Conversion update**

Linda Katzper stated that the proposed conversion of the Training Activities module from a client-server version to a Web-based version has been postponed. Initially, TA was slated to be in containment (meaning no changes would be allowed to the module during that time) for conversion between January and May 2005. Now it may be pushed back a month.

**Discussion:** Chris Myers noted that one bug in the conversion of the Grants Management module to the J2EE web-version was that if the user did not log off, the browser would automatically shut down and a ghost account would be created. If this happened four times, the user would lose his User ID and password. He suggested that the people in charge of converting TA should be cognizant of this issue.

## End-to-End Project update

Linda Katzper noted that the TA team is working on a vision document for developing the long envisioned End-to-End training system that would integrate TA and X-Train. X-Train is an NIH eRA Commons system that will allow program directors and trainees from institutions with NRSA and other training grants to submit Statement of Appointments (2271's) and Termination Notices (416-7's) electronically. Linda Katzper said the team will be holding a meeting soon to get input on the reporting requirements for such an end-to-end system and will probably tap those in attendance at this meeting to make those suggestions.

## Open Discussion

**Need for charter, discussion of hierarchy**—Some members of the group expressed frustration as to whether the discussions of the group reached decision makers or were being conducted in a vacuum. Linda Stecklein wondered where the group fell in the hierarchy and to whom the proceedings of the meetings are being reported.

Linda Katzper noted that the group had resolved some issues brought to its attention. She suggested that perhaps drawing up a charter for the group and defining its goals would be a first step. Tatiana Khramkova suggested that if decision makers cannot attend the meetings, the group could perhaps follow up with them on what was discussed so that the chain of information transmission is not broken. Linda Katzper said she would like more people to attend the meetings and said suggestions for boosting membership are welcome.

**Action: (All) Draw up a WETS charter and define goals.**

**Need for cleaning up termination backlog**—Linda Stecklein said that a current list is needed of NRSA contacts at various ICs, especially given that several Division of Extramural Activities Support (DEAS) employees have also been involved in processing the research training grant forms since DEAS became operational in October 2004. She stated that it was important to know whom to ask for when requesting information for the centralized NIH NRSA Payback Service Center (under the Office of Extramural Research).

Chris Myers suggested that it would be good if all the Institutes cleaned up their backlogged terminations before the problem snowballs into a gigantic issue for the centralized payback center. One way would be for a NIH- wide policy that all trainee records dating back to the 1970s and 1980s should be terminated, either by tracking down the trainee or by having every IC terminate them by proxy. Chris noted that he had success at two institutes — at the National Institute of Dental and Craniofacial Surgery (NIDCS) and at the National Institute of Neurological Disorders and Stroke (NINDS), where 28 pages of terminations outstanding had been whittled down to a manageable seven and a half pages. Linda Katzper noted that she could get an overall list of backlogged terminations by IC with the help of Cassandra Spears. Chris said he would meet with Walter Schaffer to discuss the problem and suggest an automated way of

terminating trainee grants by proxy. A team of DEAS experts could be charged with cleanup and then the issue could be turned over to the resident DEAS team at every IC.

**Action: (Linda Katzper) Work with Cassandra Spears on creating an overall list of backlogged terminations by IC.**

**Action: (Chris Myers) Meet with Walter Schaffer to discuss problem of backlogged terminations at ICs snowballing into a gigantic issue for the centralized Payback Center. Suggest terminating the records by proxy.**

## **Review of outstanding Action items from previous meetings**

1. (Linda Katzper) Help Dwight Mowery contact the IMPAC II system staff so that he can discuss the possibility of using the IMPAC II system for National Library of Medicine (NLM) data. *Linda Katzper stated that there had been no progress on the issue; the problem was more complex than she had thought.*
2. (Walter Goldschmidts) Look for someone to replace Barbara Huffman as an advocate for the WETS group. *Still looking.*
3. (All) Email Linda Stecklein if they know someone interested in applying for the job of Payback Specialist in her office. *The vacancy has closed.*

## **Attendees**

Katzper, Linda (OER)

Stecklein, Linda (OD)

Khramkova, Tatiana (OER)

Myers, Chris (NIDCD)

Subramanya, Manju (LTS/OD)

Sprick, Carin (DEIS)

Venable, Beverly (OD)