Workgroup on Extramural Training Systems (WETS)

Date: September 11, 2003
Time: 10:00 a.m.–Noon
Location: Rockledge 1, Room 3502
Advocates: Barbara Huffman, Rick Ikeda, (Dr. Walter Schaffer)

Next Meeting: November 13, 2003, 10 a.m.–Noon, Rockledge 1, Rm. 3502 (Note: October meeting has been cancelled)

Action Items

1. (Wally Schaffer) Contact the legal department for directions on electronic signatures.

2. (Steve Fitzgerald) Follow up on establishing separate fields for the Trainee Summary Data and the Administrative Comments.

3. (Steve Fitzgerald) Distribute business rules for closing active T35s that should be closed.

4. (Wally Schaffer) Discuss SITS with Dr. McGowan.

Electronic Termination Notices

There are plans to incorporate the Electronic Termination Notices with the first release of the new version of X-Train. Wally Schaffer, Barbara Huffman, Rick Ikeda, and Steve Fitzgerald met in August to discuss this matter.

Wally Schaffer initiated some discussion about the electronic signature. His concern was whether this form of signature would be binding. He wants to make sure the trainee can be legally responsible for any applicable payback obligation without a signed paper Termination Notice, irrespective of the signed paper copy of the Payback Agreement. It was decided that the matter would be taken to the legal department for their interpretation of the legality of electronic signatures.

Action: **(Wally Schaffer) Contact the legal department for direction on electronic signatures.**

Termination Notices

Item 8 of the Termination Notices has two purposes:

1. Allow the trainee to provide a summary of the training received and the research that was done.

2. Indicate if the fellowship or trainee appointment terminated early and to provide a reason.

The TA module has a place to capture this information, which is under "Summary and Post Award Activity—Comment." The issue is that data is coming in on a paper form but it is not getting inserted into the database; therefore, it is not being captured in Item 8. It was decided that separate fields may be necessary: one field for training and another for administrative comments.

Another Termination Notice function is to cross check dates and annual stipend amounts with applicable Statement of Appointments to reconcile the data.

Action: **(Steve Fitzgerald) Follow up on establishing separate fields for the trainee summary data and the administrative comments.**

Edit Checker

To process a Termination Notice through X-Train, an edit checker is necessary to check if the trainee has a payback obligation. If there is an obligation, the trainee must submit a signed version of the Termination Notice. An edit checker is currently in place that does a series of business rule checks when an appointment is approved.

X-Train 2.0 Demonstration

Steve gave a brief demonstration on the X-Train 2.0 version. Three screens were displayed:

- Trainee Roster Screen—
    - Provides a list of grants to work with
    - Has a hyperlink to other places outside of X-Train
- Search Profile Screen—
    - Provides a profile search of personal information, such as address, degree, etc.
- New Appointment Screen—
    - When a new appointment is made, an attempt is made to match an existing profile by calling the eRA Commons module algorithm, which is basically a function that will either return one profile or none. If it returns a profile, the system will pre-populate the person-related fields, such as address, degree, etc., in the trainee profile. The program director or the delegate can then proceed to enter the new appointment specific information.

QVR and Training Reports

Barbara gave this report for Rick Ikeda in his absence.

- *QVR*—provides standard reports that can be accessed by fiscal year. Reports can be run to capture a wide spectrum of training grant data, including data on competing and non-competing grants.
- *PivotTable*—data fields from page 1 or report can be added to this report to allow individual customization.
- *Trainee Degrees on Institutional Training Grants*—includes degree fields: None, Bachelors, Masters, PhD, and MD. A suggestion was made to include the MPH degree.

TA Enhancements

Steve reported the following enhancements to the TA module:

- The COM1100 screen now displays payback status code for individuals that do not have a payback obligation.

- If the user does not have a payback obligation, the edit checker is bypassed.

- If the trainee/fellow is active in the Loan Repayment Program (LRP), another payback status code was added to the TA module that indicates "Hold—while participating in the LRP."

- OFM has access to Payback module for the purpose of updating financial payback status.

- If the stipend level does not match the fiscal year of the grant, the new error message is "The stipend level ID does not match the fiscal year of the grant. Please fix data before processing."

Closing T35s

Several trainees with T35 appointments do not have closed termination notices. This is causing problems both in terms of possible inaccurate payback obligations for these trainees, as well as causing problems with appointing these trainees to other grants. Carin Sprick, Marie Willett, and Steve Fitzgerald met to discuss the rules for sweeping the current active T35 records that should be closed. Steve will circulate the business rules.

The following logic will be used to close out T35s:

1. Check for End Date of Appointment before June 10,1993.

2. Termination Date = End Date.

3. Make adjustments for any months owed (must be zero).

4. Check Stipend Level ID for UNKNOWN and adjust to closest stipend level for that FY.

5. Assign Stipend level of pre-doc for the particular FY.

6. Bypass address check.

Action: **(Steve Fitzgerald) Distribute business rules for closing active T35s that should be closed.**

SITS

Wally Schaffer stated that it was time to re-visit SITS because it needs to be upgraded. He said that it would be added to the list of things to discuss with Dr. McGowan.

Action: **(Wally Schaffer) Discuss SITS with Dr. McGowan.**

Update on Action Items from the Last Meeting

Action Item	Status
1. (Steve Fitzgerald) Consider enhancing the Payback Snapshot report to allow for the selection of multiple status codes.	Not done.
2. (Steve Fitzgerald) Send an email regarding incorrect termination notices as soon as a solution is determined.	Done.

Action Item	Status
3. (Steve Fitzgerald) Enhance the ASCII version of the NRSA Appointment/ Termination Resume report to print in PDF so that it can be printed in landscape format.	Not done.
4. (Steve Fitzgerald) Determine why an error message appears when trying to print the NRSA Transfer report.	Done.
5. (Steve Fitzgerald) Convene a group of people to discuss the Stipend Amount discrepancy in the Award detail tables (IRDB Fellows) and decide what the specifications should look like.	Done. If the stipend level does not match the fiscal year of the grant, the new error message is "The stipend level ID does not match the fiscal year of the grant Please fix data before processing."
6. (Steve Fitzgerald, Wally Schaffer, Rick Ikeda, Barbara Huffman, any other interested WETS members) Meet before the next WETS meeting to discuss the workflow for handling duplicate profiles.	Not done.
7. (Elaine Sirkis, Rick Ikeda, Cathy Buckley) Work together to make minor training data enhancements to the QVR Reporting system.	Done. QVR provides standard reports. It can be accessed by fiscal year. It processes competing and non-competing types of grants.
8. (Marie Willett, Sara Stone, Carin Sprick, Marsha Hahn, Steve Fitzgerald, Wally Schaffer) Meet to discuss the business rules for closing the T35s	Done. Business rules were developed to sweep the active T35 records that should be closed and close them.
9 (Steve Fitzgerald, Marie Willett, Lisa Chen) Set up another meeting with OFM.	Done. OFM has access to payback module for the purpose of updating financial payback status.

Attendees

Dean Maxwell, Tammy (OD)

Fitzgerald, Steve (RN Solutions)

Freese, Michelle (OD)

Gorelic, Lester (NCI)

Hahn, Marcia (OPERA)

Huffman, Barbara (NIAID)

Mohale, Archana (FIC)

Rosenfeld, Bobby (NCI)

Schaffer, Wally (OER)

Shreffler, Carol (NIEHS)

Sirkis, Elaine (NCI)

Sprick, Carin (DEIS)

Sullivan, Donna (NINDS)

Vann, Cecelia (OD)

Willett, Marie (OER/OD