eRA Program Module e-PUG Meeting

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Agenda

- Introductions
- Introduction to PGM
- Update/Status of PGM Module
- Brainstorming on future PGM module priorities
- Training needs/approach

What is the Program Module?

- ◆ A WEB-BASED eRA MODULE FOR PROGRAM STAFF THAT DOES BOTH TRANSACTIONS AND REPORTS
- ◆ Development began in 2001 with a working group of Program Officers (Program Portal JAD).
- ◆ Approval received to build the module in Dec. 2002
- ◆ The eRA Program Users Group (e-PUG) provides input and requirements
- ◆ Pilot Version 1.0 released April 07, 2003
- ◆ Current version released August 01, 2003
- ◆ Future releases will include additional refinements

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Basic Design Goals

- At sign-on, PGM should provide easy access to a Program Official's (PO) portfolio of grant applications and awards so the PO can do BOTH TRANSACTIONS AND REPORTS
- PO can easily find information on a single grant to respond to an immediate inquiry
- The PO's portfolio will be distributed across the grant cycle and automatically updated
- Allows approvals/transactions to be performed and accesses the On-Line Transaction Processing (OLTP) database for real-time data
- User-friendly and intuitive
- Easily links to other eRA/NIH modules

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Summer '03 Release Features

- 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

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Summer '03 Release Features
(continued)

- ◆ 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 Grant Folder

Update/Status of PGM Module

◆ Known bugs and issues will be sent to e-PUG via email

◆ PGM Training Slides & Release Notes

- ■ Available at:

  http://impacii.nih.gov/applications/apps_pgm.cfm

- ■ <u>Warning</u>: the training presentations are very large files

Brainstorming on Future PGM Priorities

◆ Open discussion

◆ Complete the Program Module
- Phase 1 of PGM involved portfolio management
- Explore Phase 2 functionality, including:
  - A unified approach for both competing and non-competing Program Approval, Checklists, and Paylists
  - Expanding the Pre-submissions page
  - Expand on Program Checklist functionality
    - GM/Program staff can document & track communications
  - Implement shared components (e.g., e-Notification, e-Requests (ARA's, 901s), eRA Document Management Services, Workflow, User Customization

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Training Needs/Approach

- Request made for lead user(s) from each IC

- Train lead user(s) first

- Lead user(s) will organize and invite eRA to train at individual ICs/buildings

- Training led by Amy Burns, with support from Advocates and Analysts