

eRA Program Module ePUG Meeting

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Agenda

- ◆ Overall PGM Module Features
- ◆ July Release
- ◆ July Prototype
- ◆ Question/Concerns
- ◆ Processes Explained
- ◆ New UI Options
- ◆ Web QT demo
- ◆ Next Steps
 - April Symposium

Overall PGM Module Features

- ◆ Manage Portfolios
 - Add/Remove grants, custom portfolios (Web QT)
- ◆ Review eSNAP/Progress Reports
- ◆ Customizable Checklists/Program Approval
- ◆ Delegation
- ◆ Pre-Submission
- ◆ PGM Analysis Tools
 - Select, save journals for searching; research PI's
- ◆ MS Outlook Calendar integration
- ◆ Interface to shared systems
 - e-Notification
 - e-Requests: ARA, 901s, and other PI requests
- ◆ DEA/Council functions?
- ◆ Hierarchical Portfolios?

July Release

- ◆ Pre-Award, and Other/Withdrawn Grants page
- ◆ Attention Flag column in each list
- ◆ Filter list by FY, Council, & Subprojects
- ◆ Delegation
 - Approvals, sign-offs, and checklists to PAs
- ◆ Add/Remove applications from a portfolio
- ◆ Integration with shared eRA modules
 - J2EE Checklists and Approvals
 - Web QT

July Prototype



Pre-Award

Withdrawn/Other

Pending SRG

Resources
[CoolTools for NIH eRA Systems](#) | [SRG Roster Index](#) | [Quick View](#) | [NIH Portal](#)

The list contains all competing applications assigned to **mkoshy**, that have a Pending IRG Review.
Only primary applications are displayed.

Subprojects filter

FY & Council filter

Save Sort

Remove Grant

To filter list, make selection then click "Search"

Add Duals
 Add all subprojects
 Add CRISP approved subprojects

FY	Council Date
2001	200301
2002	200305
2003	200308
2004	200310

[Hide Nested Sort Options](#)

Sort By: [] Then By: [] Then By: [] Then By: [] Save as Default Sort

Asc Dec Asc Dec Asc Dec Asc Dec

Search Clear

Pending SRG Hit List 1 - 7 out of 7 records Page 1 out of 1 Pages [First Page](#) [Prev](#) [Next](#) [Last Page](#)

Attn. Flag	SRA Name	SRG Mtg Start Date	SRG Mtg Location	Study Section	Agenda Report	Grant No	Prim. PCC	Pi Name (Last, First)	Application Title	PA/RFA No.	Council Date		Remove
<input type="checkbox"/>	Shrinda Ganguly	11/06/1998	Bethesda Ramada	1999/01 ZRG1- BIO-(02)A WR#	Agenda Report 1 R15 GM059050-01	P250WJ		MERKLER, DAVID	THE BIOSYNTHESIS OF OLEAMIDE AND OTHER FATTY ACID AMIDES	PA97-052	199901	Note Details	<input type="checkbox"/>
<input type="checkbox"/>	Mohindar Poonian	11/09/1998	DoubleTree Hotel	1999/01 ZRG1-AARR-3(01)S WR#	Agenda Report 1 R15 GM059050-01	C102CJ		HANSEN, ANDREW	MUTAGENESIS AND SOLUTION STRUCTURE OF VIF FROM HIV	PA97-052	199901	Note Details	<input type="checkbox"/>
<input type="checkbox"/>	Dennis Leezawski	02/08/1999	Hyatt Regency Bethesda	1999/05 REB- (0) WR#	Agenda Report 1 R15 GM059050-01			WOODRUFF, RICHARD	THE CELL PHYSIOLOGY OF INSECT OVARIAN FOLLICLES	PA97-052	199905	Note Details	<input type="checkbox"/>
<input type="checkbox"/>	Ronald Dubois	02/17/1999	Double Tree Hotel	1999/05 MCHA- (0) WR#	Agenda Report 1 R15 GM059050-01			KUTATELADZE, ANDREI	PHOTOFRAGMENTATION IN COREY'S DITHIANE-CARBONYL	PA97-052	199905	Note Details	<input type="checkbox"/>
<input type="checkbox"/>	Ronald Dubois	02/17/1999	Double Tree Hotel	1999/05 MCHA- (0) WR#	Agenda Report 1 R15 GM059050-01			MENDENHALL, G	AMOXIDATION AND OTHER REACTIONS OF IMINOXYL RADICALS	PA97-052	199905	Note Details	<input type="checkbox"/>
<input type="checkbox"/>	Gopa Rakshit	03/01/1999	Double Tree Hotel	1999/05 PB- (0) WR#	Agenda Report 1 R15 GM059050-01	P000PP		ROBERTS-KIRCHHOFF, ELIZABETH	ROLE OF CYTOCHROMES P450 IN ISOFLAVONE METABOLISM	PA97-052	199905	Note Details	<input type="checkbox"/>
<input type="checkbox"/>	Ronald Dubois	02/17/1999	Double Tree Hotel	1999/05 MCHA- (0) WR#	Agenda Report 1 R15 GM059050-01			HERSH, WILLIAM	CHIRAL PHOSPHORUS LIGANDS AND ANTISENSE OLIGONUCLEOTIDES	PA97-052	199905	Note Details	<input type="checkbox"/>

Attn Flag

Add/Remove Grant buttons

Download Remove Selected Add A Grant

Pre-Award  ← **Pre-Award page**

Resources
[Quick View](#) | [NIH Portal](#)
 The list contains all competing applications for current FY assigned to **mkoshy**, have a status of Pending Award, Council-not recommended for consideration, Council deferred, and To be Paid. Only primary applications are displayed.

To filter list, make selection then click "Search"

Add Duals
 Add all subprojects
 Add CRISP approved subprojects

FY	Council Date
2001	200301
2002	200305
2003	200308
2004	200310

[Hide Nested Sort Options](#)

Sort By Then By Then By Then By Save as Default Sort

Asc Dec Asc Dec Asc Dec Asc Dec

Post Council Hit List 1 - 1 out of 1 records Page 1 out of 1 Pages [First Page](#) [Prev 1](#) [Next](#) [Last Page](#)

Attn. Flag	PI Name (Last, First)	Grant No	Project Start Date	Project End Date	Type 5 Receipt Date	e-Snap Due	Future Years	Budget Start	Budget End	Pop Tracking Entered	Program Approval		Remove
<input type="checkbox"/>	UBEL, PETER	2 R01 CA078052-03	1/25/1998	1/25/1999	12/31/2000	12/31/2001	99	12/31/2001	12/31/2002	Y	Signed	Note Details	<input type="checkbox"/>
<input type="checkbox"/>	UBEL, PETER	2 R01 CA078052-03	1/25/1998	1/25/1999	12/31/2000	12/31/2001	99	12/31/2001	12/31/2002	Y	Un-Signed	Note Details	<input type="checkbox"/>

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Withdrawn / Other ? Withdrawn/Other page

Resources
[CoolTools for NIH eRA Systems](#) | [SRG Roster Index](#) | [Quick View](#) | [NIH Portal](#)
 The list contains all competing applications assigned to **mkoshy**, that have a Pending IRG Review.
 Only primary applications are displayed.

To filter list, make selection then click "Search"

Add Duals
 Add all subprojects
 Add CRISP approved subprojects

FY	Council Date
2001	200301
2002	200305
2003	200308
2004	200310

[Hide Nested Sort Options](#)

Sort By Then By Then By Then By

Save as Default Sort
 Asc Dec
 Asc Dec
 Asc Dec
 Asc Dec

Search Clear

Pending SRG Hit List 1 - 7 out of 7 records Page 1 out of 1 Pages [First Page](#) [Prev](#) [Next](#) [Last Page](#)

Withdrawn / Removed	Attn. Flag	PI Name (Last, First)	Grant No	Prim. PCC	Application Title	PA/RFA No.	SRA Name	Study Section	IRG Action	Council Date	Percentile	Priority
Withdrawn	Y	MERKLER, DAVID	1 R15 GM059050-01	P250WJ	THE BIOSYNTHESIS OF OLEAMIDE AND OTHER FATTY ACID AMIDES	PA97-052	Chhanda Ganguly	1999/01 ZRG1- BIO-(02)A WR#	Text text text	199901		
Removed	N	HANSEN, ANDREW	1 R15 GM059050-01	C102CJ	MUTAGENESIS AND SOLUTION STRUCTURE OF VIF FROM HIV	PA97-052	Mohindar Poonian	1999/01 ZRG1- AARR-3 (01)S WR#	Text text text	199901		
Removed	Y	WOODRUFF, RICHARD	1 R15 GM059050-01		THE CELL PHYSIOLOGY OF INSECT OVARIAN FOLLICLES	PA97-052	Dennis Leszczynski	1999/05 REB- -0 WR#	Text text text	199905		
Withdrawn	N	KUTATELADZE, ANDREI	1 R15 GM059050-01		PHOTOFRAGMENTATION IN COREY'S DITHIANE-CARBONYL	PA97-052	Ronald Dubois	1999/05 MCHA- -0 WR#	Text text text	199905		
Withdrawn	Y	MENDENHALL, G	1 R15 GM059050-01		AMOXIDATION AND OTHER REACTIONS OF IMINOXYL RADICALS	PA97-052	Ronald Dubois	1999/05 MCHA- -0 WR#	Text text text	199905		
Removed	Y	ROBERTS-KIRCHHOFF, ELIZABETH	1 R15 GM059050-01	P000PP	ROLE OF CYTOCHROMES P450 IN ISOFLAVONE METABOLISM	PA97-052	Gopa Rakshit	1999/05 PB- -0 WR#	Text text text	199905		
Withdrawn	N	HERSH, WILLIAM	1 R15 GM059050-01		CHIRAL PHOSPHORUS LIGANDS AND ANTISENSE OLIGONUCLEOTIDES	PA97-052	Ronald Dubois	1999/05 MCHA- -0 WR#	Text text text	199905		

Download Remove Selected Add A Grant

Pre-Council

Resources
ECB | QVR | ICSTORE | Quick View | NIH Portal
The list contains all competing applications for current FY assigned to **mkoshy**, that have a status of Pending Council Review, No IRG Recommendation, and NRFC.
Only primary applications are displayed.

To filter list, make selection then click "Search"

Add Duals
 Add all subprojects
 Add CRISP approved subprojects

FY	Council Date
2001	200301
2002	200305
2003	200308
2004	200310

Hide Nested Sort Options

Sort By: [] Then By: [] Then By: [] Then By: []

Asc Dec Asc Dec Asc Dec Asc Dec

Search Clear

Pending Council Hit List

Attn. Flag	Pi Name (Last, First)	Grant No	Percentile	Priority Score	Application Title	Study S
<input type="checkbox"/>	JACKSON, ANTHONY	9R01 CA087312-02			TYPE 9 USES FORMER GRANT # TO 2001/10 SET PROJECT START DT 0 VWR#	

Download Remove Selected Add A Grant

eRA Web QT - Add Grants - Microsoft Inter...

Add Grants

Please Enter **Appl. ID** [] OR

Type Activity IC Code Serial Number Support Year Suffix

Grant No. [] [] [] [] [] []

PI Name [] [] [] [] [] [] [] [] [] []

Look Up Cancel

No hitlist

Add Grant

Question/Concerns

- ◆ Pre-award page
 - Same columns as Post Award page?
- ◆ Other/Withdrawn Grants page
 - What columns to display?
- ◆ Upload notes (e.g., meeting notes) from a user's computer to the system
 - What we can and cannot accomplish
- ◆ Combine all reports in one pop-up window
- ◆ Hierarchical portfolios: options (next slide)

Question/Concerns - Hierarchical Portfolios

- ◆ Default portfolios at many levels
- ◆ Issue: org structure not captured in eRA
- ◆ Options explored to determine org structure:
 - Use PCC
 - Use NBS, NIH human resources, or NEDS system
 - Use budget categories used by EO or Budget Office
 - Assign Division, Branch, and Program Area level Directors to each application
 - Use CANs
 - Recreate org structure in eRA

Processes Explained: Add/Remove Grants

- ◆ Add/remove grants from a portfolio
 - Depending on status, added to a default portfolio
 - Only grants from current, future, and 2 past FYs added
 - Only grants that aren't in any default portfolios added
 - Exception: A grant in the "Other/Withdrawn" stage
 - ◆ May be "moved" to a portfolio based on status, by adding
 - Only grants added by user can be completely removed
 - Grants in "default" portfolio that are removed will be "moved" to the Other/Withdrawn portfolio
 - ◆ May be "moved" back to a portfolio based on status, by adding
 - Grants with an "unused" status will remain in Other/Withdrawn portfolio for one year

Processes Explained: Delegation

- ◆ Delegation accomplished by "roles"
 - Role assigned to PO and if needed, to PA
 - All users with role have privileges to:
 - ◆ Perform approvals, checklists, PO, and sign notes
 - Signature/approval audited and tracked
 - Currently in ICO and all eRA modules
- ◆ PGM will use similar mechanism

Web QT Demo

New UI Options

- ◆ Multi-line rows in a list
 - Multiple values in a column within a row
- ◆ Left-side of hitlist remains constant, while right-side has multiple views

Expanded Hit List
 Basic Hitlist **Expanded Hitlist** My List 1 My List 2 My List 3

Search By: Grant Number = 1R01 AND Title = 'Test Title' AND Admin Coding = 'Value 1','Value 2','Value 3' AND Requested Total \$Yr 1 Less Than or Equal To 100,000

Sort By Then By Then By Then By Then By
 ASC DESC ASC DESC ASC DESC ASC DESC ASC DESC

Multiple values in a column

Select All / None Sort Order: Grant-IC Code(ASC); PI Name(DESC) [Reset Sort Order](#) 11 - 20 of 651

Grant No. Sort By	Act/IC/Serial	PI Name (L, F, MI)	PCC from IC	Details
<input type="checkbox"/> 1R01 AI12345601A10001		LI, TING-KAI	ABCDEF GH	Council Date Admin. IC: 200012 PO Name Admin. IC: text Priority Score: 12345 Institution: Institution Name Text Former Grant Number:1-R01AI123456-01A1/0001 SRG Meeting Identifiers: 123 Percentile: 99.99 RFA/PA: 1234567890
<input type="checkbox"/> 1R01 AI12345601A10001		SYRJALA, KAREN	ABCDEF GH	Council Date Admin. IC: 200012 PO Name Admin. IC: text Priority Score: 12345 Institution: Institution Name Text Former Grant Number:1-R01AI123456-01A1/0001 SRG Meeting Identifiers: 123 Percentile: 99.99 RFA/PA: 1234567890
<input type="checkbox"/> 1R01 AI12345601A10001		SYRJALA, KAREN	ABCDEF GH	Council Date Admin. IC: 200012 PO Name Admin. IC: text Priority Score: 12345 Institution: Institution Name Text Former Grant Number:1-R01AI123456-01A1/0001 SRG Meeting Identifiers: 123 Percentile: 99.99 RFA/PA: 1234567890
<input type="checkbox"/> 1R01 AI12345601A10001		SYRJALA, KAREN	ABCDEF GH	Council Date Admin. IC: 200012 PO Name Admin. IC: text Priority Score: 12345 Institution: Institution Name Text Former Grant Number:1-R01AI123456-01A1/0001 SRG Meeting Identifiers: 123 Percentile: 99.99 RFA/PA: 1234567890
<input type="checkbox"/> 1R01 AI12345601A10001		SYRJALA, KAREN	ABCDEF GH	Council Date Admin. IC: 200012 PO Name Admin. IC: text Priority Score: 12345 Institution: Institution Name Text Former Grant Number:1-R01AI123456-01A1/0001 SRG Meeting Identifiers: 123 Percentile: 99.99 RFA/PA: 1234567890
<input type="checkbox"/> 1R01 AI12345601A10001		SYRJALA, KAREN	ABCDEF GH	Council Date Admin. IC: 200012 PO Name Admin. IC: text Priority Score: 12345 Institution: Institution Name Text Former Grant Number:1-R01AI123456-01A1/0001 SRG Meeting Identifiers: 123 Percentile: 99.99 RFA/PA: 1234567890

Next steps

◆ Deadlines:

- Requirements Deadline: March 14
- User Interface Review: March 21
- Requirements Freeze: March 28

◆ Next steps:

- Accounts in "Staging" environment
- April symposium: PGM is the highlight!
- Meet once or twice more before March 28?