Research Unit Liaison Meeting

December 4, 2007
3:00 – 4:30 pm
Agenda

- eResearch Proposal Management System (eRPM) Project Status
- eRPM Workflow
- Task 6: Identify contacts for:
  - PAN/PAC email notification
  - Proposal preparation & review
- Task 7: Identify rough headcount of training candidates for leader-led training
- Next steps & tasks
eRPM – Project Status

● System Design & Development
  – Nearing completion

● Testing
  – System Performance Testing
    ● Currently underway
  – User Testing

● Limited Availability
  – February – April 2008
    ● Pilot with 20-25 proposals from variety of units
  – Training
    ● Support limited availability users
    ● Training for full availability will start during the limited availability period

● Full Availability
  – Projected for May 2008
Proposal Process

1. PI/Research Administrator
   - PIs & Research Administrators collaborate on PAF & Admin Shell

2. Units
   - Unit reviewers (Department roll-up & reviewers/approvers) are calculated by the system using the information completed on PAF.
   - The system sends email notifications when it is a units turn to review/approve the PAF.

3. DRDA
   - DRDA reviews & approves proposal.
   - Proposal submitted to sponsor by DRDA or Project Team

4. Sponsor
   - Sponsor approves proposal.
   - Sponsor turns down proposal.

5. Award
   - DRDA Processes Award working with FINOPS & Contracts

6. Active
   - Project Research
Proposal Process – Managing Changes

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Managing PAF/Proposal Changes:
- Project team can make changes.
- Reviewer can request/make changes.
- All changes are logged.
- If a change is made after approval, party that already approved is notified.
- Project team is notified any time a change is made.
When a PAN/PAC is awarded, an email notification is sent to following people identified on the PAF:
  - UM Principal Investigator(s)
  - Sponsor Principal Investigator (when applicable)
  - Participating Investigators With Effort
  - Administrative Personnel

Your task: For each Dept ID, identify individuals or email groups that should receive PAN/PAC email notification.
  - Note: The system prevents duplicate email notifications from being sent to individuals, but this does not include individuals that are part of an email group.
Task 6 - Proposal Prep & Review Contacts

- Your task: For each Dept ID, identify contacts to facilitate proposal preparation & review.
  - Parties to contact for questions related to proposal preparation & review.
  - Will be publically listed.
  - Will eventually replace the information listed in the Blue Pages.
## High-level eRPM Training Approach

### Timeline

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<th>Tweak with Feedback</th>
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<td>Support Limited Availability</td>
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### Materials

- **Online Help**
  - **Job Aids/Procedures**
  - **Quick Reference Card**
  - **System Demos/Simulations**
  - **Hands-on Instructor-led Training**
  - **Large Group Training**
  - **Prepare Unit Trainers**
  - **Unit-Led Training**

### Support

- **DRDA Staff**
- **Unit Administrators (Train Reviewers & Approvers)**
- **Unit Admins & Other Key People (Train Research Administrators/PIs that complete PAF)**
- **Research Administrators/PIs that complete PAF**
- **General eRPM Info Faculty/Staff**
Course 1

- Audience: PAF completers (Research Administrators & some Principal Investigators)
- Includes how to: Login, understand home page basics, complete PAF, complete Grants.gov 424 forms when applicable, track proposal routing process, make & submit changes

Course 2

- Audience: Reviewers & Reviewers that sign PAF
- Includes how to: Login, understand home page basics, review PAF & proposal documents, make changes or request changes, approve PAF

Course 3: Both 1 & 2
Your task: Identify rough headcount of how many people from your unit will need:

– Course 1 (PAF completers)
– Course 2 (Reviewers)
– Course 3: Both 1 & 2
Next Steps

- Complete your tasks
  - Task 6 – Identify PAN/PAC email notification contacts & proposal preparation & review contacts
    - You will receive your spreadsheet via email
    - **Due:** Before holiday break
  - Task 7: Provide rough headcount of candidates for leader-led training courses
    - **Due:** Before holiday break

- Reminder eRPM baseline survey is being sent out this week. Please help encourage your investigators & research administrative staff to complete.
Future Meeting Topics

- January 15, 2008
  - Time: 3 - 4:30 pm
  - Location: Atkins Room, School of Information North

- Tentative Topics:
  - Home page basics
  - PAF demonstration
  - Limited release information
  - Preparing units for May 2008 eRPM system release
    - Sharing information with units
    - Training information