Research Unit Liaison Meeting

April 1, 2008
3:00 – 4:30 pm
Agenda

- Project status
- Next task – setting optional flag for department review order
- Unit Liaison maintenance of department information (reviewers, email notifications, and contacts for proposal questions)
- Next Meetings
● System Design & Development
  - Nearing completion

● Testing
  - System Performance Testing
    ● Complete
  - User Testing
    ● TBD

● Limited Availability
  - Date to be determined
    ● 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
  - Date to be determined
Proposal Process Overview without Changes

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

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

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

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

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

6. Active
   - Project Research
Proposal Process Overview – States & State Transitions (No Proposal Changes)

1. PI/Research Administrator
   - Proposal Preparation
   - PI/Primary Research Administrator Routes for Approval

2. Units
   - Unit Review
   - Unit Review Complete

3. DRDA
   - DRDA Review
   - DRDA or Project Team Submits to Sponsor

4. Sponsor
   - Sponsored by Sponsor
   - Sponsor turns down proposal
   - DRDA Processes Award
   - Processing Award

5. Award
   - Award

6. Active Project
   - Sponsor has UM code, PR reviews complete, and FINOPs processing complete
   - Active

Proposal changes not included.
Unit Review

1. PI/Research Administrator
   - Proposal Preparation
   - PI/Primary Research Administrator Routes for Approval

2. Units
   - Unit Review

3. DRDA
   - DRDA Review

4. Sponsor
   - Submitted to Sponsor
   - Sponsor turns down proposal.

5. Award
   - Processing Award

6. Active Project
   - Active

Departments to Review Proposal
System calculates all departments required for approval based on departments entered on PAF for:
- Administrative Home
- Selected Appointments for Key Personnel (except Participating Investigators without effort)
- Space
- Cost-Sharing
- Other Commitments
- Sub-Project/Grants

Review Order
Review hierarchy tables calculate proposal review order for divisions, departments, and deans.

When it is a department's turn to review, an email is sent to department's PAF email contact and proposal appears in the Reviewer's Inbox.

Unit Review Complete
When all units have signed the PAF, it then transitions to DRDA review.

Proposal changes not included.
CRLT->DRDA
(very common – no other levels need to sign)

Epidemiology->School of Public Health->DRDA
(very common – one other level needs to sign before goes to DRDA)

Cardiology->Internal Medicine->Med School->DRDA
(not as common, but common at Med, two levels must sign before goes to DRDA)
Task - Setting optional flag for department review order

**Default no flag set**
- Review order calculated by review hierarchy table

```
Division1 -> Department1 -> Dean1
Division2
Division3 -> Department2
```

Division 3 = PI Administrative Home

**Flag set** - Project Administrative Home Department does NOT review proposal until all other departments have completed review
- Review order calculated by review hierarchy table

```
Division1 -> Department1 -> Dean1
Division2
Division3 -> Department2
```

Division 3 = PI Administrative Home
Where to Set Optional Review Flag

- Flag defaults to **No**.
- Select **Yes** for department if the department should wait to begin review until ALL other departments have completed their review.

Remember this only is applicable when the department is the administrative home for a project.
Maintain Department Information

- Series of tasks to gather information to load data into the system
- To keep department information up to date and current, Research ULs will maintain the following in the eResearch Proposal Management Sandbox:
  - Reviewers
    - Reviewers
    - Reviewers who can sign (formerly known as Approvers)
  - Email notifications
    - PAF
    - PAC/PAN
  - Contacts for proposal questions (formerly known as Public Contacts to Facilitate Proposal Preparation & Review)
1. Login into Sandbox
   http://hibiscus.mpathways.dsc.umich.edu/RsrPrpslMgt_sand
   New link as of 4/14/08:
   http://erpm-sandbox.dsc.umich.edu

2. List of your departments appear in your UL Home Workspace.

3. Select department to maintain.

4. Make changes.

5. Click **OK** to save.

For detailed instructions, see:
- Unit Liaison Home Workspace – Field Description
- Manage Department Information – Review Access, Email Notification, and Contacts for Proposal Questions – Step-By-Step Procedure
Next Steps

- Complete task (Setting optional flag for department review order) before next Research UL meeting, 5/6/08

- Maintain department information in sandbox as needed
● May 6, 2008
  – Time: 3:00 - 4:30 pm
  – Location: School of Information North, Atkins Room

● July 1, 2008
  – Time: 3:00 - 4:30 pm
  – Location: Kipke