Research Administration Advisory Council (RAAC)
Committee-at-Large
Tuesday, April 21, 2015, 3:00 – 4:30 pm
College of Literature, Science, and the Arts
Deans Conference Room, 2001

MINUTES

Introductions of Members and Guests: (Daryl Weinert)
Thank you to Peggy and Steve Beech, our hosts today.

Presentation: RAAC Communications Subcommittee (Pat Turnbull)
PowerPoint presentation is attached to these minutes

New members: Stacey Althouse, ORSP.

Completed since September 2014: Two RAN meetings, September 2014 and February 2015. Enhancements have been added at RAN meetings. We’ve added an emcee for the meetings, a Professional Development spotlight, and provided a questionnaire/outline for presenters to use in preparation for RAN meetings.

Small Task Team Projects: A best practices guide for communications in Research Administration was created. The Grants.gov FAQ page on the ORSP website was reviewed and revisions/updates were recommended.

Full Committee Group projects: A review of top 10 most frequently visited ORSP webpages was conducted. We evaluated Acronyms & A-Z Index on the ORSP website & made recommendations for improvements.

Currently working on: A review of the RAN Satisfaction Survey. We received 179 responses. People are interested in central office updates & what’s going on in central offices. There has been strong interest in video presentation of RAN meetings. There are mixed feelings about the networking component of RAN meetings.

We are currently working a Pilot broadcast & recording of the May RAN meeting, in conjunction with ITS, as a special courtesy, at no cost. This RAN meeting will be shortened due to the UMOR recognition awards ceremony. There will be no networking this time, as a result.

There was some inconsistency with the announcement of UMOR Recognition Awards event, so Constance will send a RAPid announcement.

Upcoming and ongoing work: Facilitate a blog/forum/email group for Research Administrators to interact with one another. Continue to plan & execute RAN meetings. Provide input to assist in the development of Research Administration websites, and RAPid posts.
Daryl noted that now that we have had RAP and RAPid for about a year it may be time to do a survey and ask for feedback about what’s useful, is it working for it’s intended purpose, what content would be more relevant? Linda noted that it improves every time it comes out! Constance wants to work on getting the newsletters out on a more timely basis.

Daryl commented that he’s curious about segmenting of the audience? Constance replied that we are segmenting, but she still thinks there are people who are unsubscribing whether intentional or not. At the bottom of every email it gives you a chance to unsubscribe or modify your subscriptions. We have a list of our most engaged users, who subscribe and who attend RAN meetings. We can ask people to update their subscriptions.

Daryl challenged the Subcommittee, now that we have these tools, are we getting the right info to the right people at the right time?

Scott Stanfill noted that RAP and RAPid have the same header, but he thinks they should be drastically different, to differentiate one from the other.

**Update:** RAAC Training - Subject Matter Experts for RA newcomers training *(Mindy LaRocca)*

New RA training is in the works. This Thursday we are meeting with HRD and then on 4/29 six of us are going to meet to begin categorization the learning objectives, with follow-up on 5/8. Our timeline is aggressive. HRD wants to get started developing the training the second and third weeks of May. RAAC Training will be reaching out to you for newer RAs and experience RAs for subject matter expertise. Watch for an email. We really want to tap the knowledge that is out there!

Linda Forsyth asked if the volunteers you are asking for now are to put the curriculum together, not teaching, right? Mindy replied yes. Daryl noted that we are on an aggressive timeline to roll this out in the fall.

Peggy observed that as RAIN ran along over the years, the scope of a subject kind of grew or crept. Mindy replied that we would have certain objectives that must be covered at each training. Cathy noted that the objectives we developed were the basics. Your unit may have more information. Daryl commented that this training should be like undergrad pre-requisites, and then you get into your “major” subjects in your unit.

Constance added that if you have feedback about the website she would love to hear it.

**Update:** Uniform Guidance *(Craig Reynolds, Bryan VanSickle)*

Craig Reynolds and Bryan VanSickle have been co-chairing the University’s UG task force. They have been working with Amanda and Constance to plan how to get the UG information out to the campus community. *(See attached handout)* The plan is to attack this task at three levels. Level I: Executive summary, the 30,000’ view. Level II: Consideration Layer, with high-level information on the website and meeting presentation for groups of 20-200 framed with context for those who know the process and want to know more. Level III: In-depth detail with technical information and step-by-step detail.

Feedback at the RAAC EC meeting was that everyone wants Level III details, which are still being worked out. The timeline for April/May is we will be dropping in at the local school/college level, but only at the level that people will find helpful.
The timeline for June is that we will have a set of training materials and will be conducting town halls or let RAAC cover at local level about what business change processes are coming.

We don’t think there will be a big change to what people are doing currently. Post Award Change forms will not be changing drastically. A21 reviews (now UG reviews), what will be different about the process come July 1. There are some dollar threshold changes, and some nomenclature changes. For example: equipment purchases. Under Research Terms & Conditions the UG threshold if an equipment purchase is $5,000 or more you will now have to get approval.

Bryan noted that it would be helpful if you would examine your websites to update the language to reference the UG (rather than OMB Circulars). Constance commented that we will be starting to transition to new language now. For instance using “Uniform Guidance Cost Principals, formerly A21”, etc. Constance will get some agreed upon labels and share them with all.

Craig noted that we will be reaching out and asking for your assistance about communication at the second level.

**Update:** Michigan Informational Dashboard for the Administration of Research (MIDAR) (*David Mulder, ITS*)

*PowerPoint presentation is attached to these minutes*

A Capital Funding Request was made for FY16, which will provide seed money to work on the conceptual project. If that goes well we will be given additional funds.

Why MIDAR? Two separate national surveys show federally sponsored researcher administrative burden at 42%. Just saving ten minutes per week would redirect $2 million back to research. In addition there are currently compliance risks due to lack of integrated data across research administration systems to connect dots.

MIDAR Components: PI Portal, Award Management, Data Integration, IRB System Update/Redesign, and Lab Safety Implementation/Integration.

Suggestions were made to include eVerify and RCRS. Linda Forsyth noted that one thing to add would be reporting.

The ADAC committee requested a Proof of Concept be conducted. The Proof of Concept Requirements are:

1. Technical Proof of Concept—show that the data can be integrated in a way to make the Portal Transactional.
2. Solution architecture
3. Additional validation (buy in) of need from user community (i.e. PIs, RAs)

Peggy Westrick asked if we’ve had two national surveys that show 42% burden what else is needed? David replied greater assurance that this will solve the problem. Craig noted that we would receive the actual data from FDP that our faculty gave. David commented that James Ashton Miller brought up that if you do have an expired IRB deadline, and you have to submit a renewal and an Other Reportable Information or Occurrence (ORIO), then avoiding that sort of
burden with reminders and links, anticipation of deadlines, etc., would reduce burden and save
time by negating the need for the ORIO.

Pat asked how we could help with buy in. Cathy Handyside replied that examples of what this
system would help with to help build business case for impact. Send those thoughts to Cathy or
David.

Pat was curious what the timeline is? David replied that the capital funding is broken into a
three year proposed budget. He’s reluctant to say we think this is a three-year project, but that
feels right.

Cathy Seay-Ostrowski commented on how we can help validate the need from units. The central
offices might be surprised what faculty think of as their burden—it may not be the usual top ten
topics. Cathy Seay-Ostrowski also complemented the dashboard, that will surely save ten
minutes, just having a centralized place to go.

Daryl noted that we should stay tuned. We are asking for $7 million, which is a very small
amount of the research dollars in the institution, but still a significant amount of money.

**Update: ITS (Cathy Handyside)**

We are moving to new hardware the weekend of 4/25, so the system will not be available. The
following weekend we will be moving to new software, same scenario. You will not see a lot of
user facing changes.

**Update: Sponsored Programs (Debbie Talley)**

We received the first sample request for the NSF audit. 250 items. NSF is asking for information
that we can pull in our office, but we will need your help for information we do not have in our
office. We will be reaching out in the next week or so for information. We will provide receipts
and documentation, but we will need narrative justification for NSF questions from you.

This is the first sample. There will be a follow up sampling, as well. This audit covers the time
period of October 2011 through September 2014. We are trying to figure out whether or not to
send a broad message and then a specific request, or not.

Bryan noted that the A/R SPG is being updated. This will be for two purposes. For sponsored
projects if there is billing being done it has to go thru A/R. If you are producing an invoice it
needs to go through A/R. Bryan’s staff can answer questions. After the first of the new fiscal
year the Shared Services staff will be going out to units to show how the process works.

The A133 audit is done!

**Update: ORSP (Daryl Weinert, Craig Reynolds)**

Just a heads up, Daryl is co-chairing a working group looking at the global Volume of Research
that UM does, particularly what we do for NSF each year and what portion of that represents
institutional dollars. We will be reaching out to RADs, copying BAG, to get detail regarding what
institutional funds represent in your unit. This may be different in different units. Stay tuned.

Cathy Seay-Ostrowski asked if people are using chartfield class for gathering this data? Will this
result in some uniform guides about how to use chartfields? Daryl replied that it might. Much of
this results in ambiguous questions.
Craig and Daryl are working with CoE to update some of our language regarding the difference between gifts and grants and particularly who processes such a thing. Stay tuned we will probably be coming to you at some point.

Staff changes at ORSP: Kendra Walters has been promoted into an Administrative Specialist position. We have two new support staff, Zach Nixon and Dawn Curry, both of whom came from positions at UMHS.

Scott Stanfill asked if anyone is looking at the Volume of Research vs. the Volume of Sponsored Activity? The School of Social Work is interested in that.

**Closing and Future Meetings: (Daryl Weinert)**

The next RAAC meeting is May 19 at the Ross School of Business, room R0320.

The meeting was adjourned at 4:34pm

Minutes submitted by Lisa Kiel

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**RAAC Committee-At-Large Meeting Dates**
- Tuesday, May 19, 2015, 3:00 – 4:30 pm (Ross School of Business)
- ***NO MEETING IN JUNE***
- Tuesday, July 21, 2015, 3:00 – 4:30 PM (College of Engineering)
- ***NO MEETING IN AUGUST***

**RAAC Executive Committee Meeting Dates** (meetings held in Conference Room 1025, Wolverine Tower)
- Tuesday, May 12, 2015, 3:30 – 5:00 pm
- Tuesday, June 9, 2015, 3:30 – 5:00 pm
- Tuesday, July 14, 2015, 3:30 – 5:00 pm
- ***NO MEETING IN AUGUST***
Communication is key to understanding needs, which is key to improved operations—our goal is to help ORSP, Sponsored Programs, and Research Administrators share information with one another so we can work together better.

**Members:**

- Stacey Althouse, ORSP
- Leslie Chavez, Sponsored Programs
- Constance Colthorp, ORSP and Sponsored Programs
- Lori Deromedi, UMOR Compliance
- Carrie Disney, School of Social Work
- Cathy Handyside, ITS
- Lisa Kisabeth, LSA
- Heidi Madias, LSA
- Brenda Phillips, Medical School
- Yvonne Sturt, OSRP and Sponsored Programs
- Pat Turnbull, Dearborn Campus (Chair)
- Corey Turner, School of Information
1. Planned and executed two Research Administrators’ Network (RAN) meetings

- **September 2014**
  - RA Mentoring Program
  - Procurement Small Business Plans
  - Communications Best Practices

- **February 2015**
  - Shared services update
  - Love Boat Meet & Greet

- **Added enhancements**
  - the “Emcee Element”
  - Professional Development Spotlight
  - Presenter questionnaire
2. Small Task Team Projects

I. Best Practices Guide for Communications in Research Administration (Constance, Lisa, Heidi, Leslie) Edited, consolidated, presented at September RAN

II. Grants.gov FAQ page on ORSP website (Carrie, Corey worked with Stacey & Kathy DeWitt) reviewed and recommended revisions/updates
3. Full Committee Group Projects

I. Review of top 10 ORSP webpages
   - NIH/eRA Commons Info
   - Indirect Cost Rates
   - Frequently Required Proposal Data
   - GSRA Cost Estimates
   - Finding Funding
   - RA Toolkit: Links
   - Who can be a PI
   - Blue Pages
   - Proposal Preparation/Submission
   - Proposal Processing: PAF

II. Evaluated Acronyms & A-Z index on ORSP website & made recommendations for improvements
Currently working on...

1. **Review of RAN Satisfaction Survey**
   - 179 survey responses told us:
     - Central office updates & what’s going on in research administration are most important
     - Many people don’t have time to attend
     - Strong interest in having video of RAN
     - Mixed feelings about networking
     - There is interest in having a way to interact with other RAs outside RAN
     - Still evaluating a few dozen comments
## Summary

### Your Experience with RAN

1. How many RAN meetings have you attended in the past two years?

<table>
<thead>
<tr>
<th>Number of Meetings</th>
<th>Count</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>18</td>
<td>10.1%</td>
</tr>
<tr>
<td>1-3</td>
<td>69</td>
<td>36.5%</td>
</tr>
<tr>
<td>4-7</td>
<td>92</td>
<td>51.4%</td>
</tr>
</tbody>
</table>

2. For what purpose(s) do you attend RAN meetings (if you do) or would you attend (if you could)? Select all that apply.

<table>
<thead>
<tr>
<th>Purpose</th>
<th>Count</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>To get updates from central offices</td>
<td>155</td>
<td>86.6%</td>
</tr>
<tr>
<td>For networking opportunities</td>
<td>91</td>
<td>45.3%</td>
</tr>
<tr>
<td>For professional development</td>
<td>90</td>
<td>50.3%</td>
</tr>
<tr>
<td>For community building</td>
<td>58</td>
<td>32.4%</td>
</tr>
<tr>
<td>To connect with other Research Administrators</td>
<td>97</td>
<td>54.2%</td>
</tr>
<tr>
<td>To learn about what's going on in the Research Administration community</td>
<td>152</td>
<td>84.9%</td>
</tr>
<tr>
<td>Because the presentations and speakers are relevant</td>
<td>104</td>
<td>58.1%</td>
</tr>
<tr>
<td>My position requires that I attend</td>
<td>26</td>
<td>14.5%</td>
</tr>
<tr>
<td>Other</td>
<td>5</td>
<td>2.8%</td>
</tr>
</tbody>
</table>

3. If you do not attend RAN meetings, please tell us why:

<table>
<thead>
<tr>
<th>Reason</th>
<th>Count</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not applicable, I do attend</td>
<td>69</td>
<td>36.5%</td>
</tr>
<tr>
<td>I don't attend because I'm not a research administrator</td>
<td>2</td>
<td>1.1%</td>
</tr>
<tr>
<td>I don't have time to attend RAN meetings</td>
<td>25</td>
<td>14%</td>
</tr>
<tr>
<td>My supervisor does not support my attendance at RAN meetings</td>
<td>4</td>
<td>2.2%</td>
</tr>
<tr>
<td>Other</td>
<td>34</td>
<td>19%</td>
</tr>
</tbody>
</table>

### Networking Component of RAN

4. Each RAN meeting currently has a networking component that is approximately 30 minutes long. How valuable is this networking opportunity to you?

<table>
<thead>
<tr>
<th>Valuation</th>
<th>Count</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very valuable</td>
<td>49</td>
<td>27.4%</td>
</tr>
<tr>
<td>Somewhat valuable</td>
<td>27</td>
<td>15.1%</td>
</tr>
<tr>
<td>Not very valuable</td>
<td>7</td>
<td>4.3%</td>
</tr>
<tr>
<td>Other</td>
<td>37</td>
<td>22.2%</td>
</tr>
</tbody>
</table>

### Presentation Component of RAN

5. Past RAN meeting agendas and presentation slides are posted at http://hspr.uchc.edu/ran. Following each RAN meeting, how useful would it be to you if, in addition to the presentation slides, we provided video or audio-enhanced presentations online?

<table>
<thead>
<tr>
<th>Usefulness</th>
<th>Count</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very helpful</td>
<td>69</td>
<td>38.5%</td>
</tr>
<tr>
<td>Might be helpful</td>
<td>79</td>
<td>44.1%</td>
</tr>
<tr>
<td>Not helpful</td>
<td>26</td>
<td>14.5%</td>
</tr>
<tr>
<td>Other</td>
<td>3</td>
<td>1.7%</td>
</tr>
</tbody>
</table>

6. If the presentations were made available for you to view after the meeting (in video or audio format), how likely is it that you would still attend the regular meetings in person?

<table>
<thead>
<tr>
<th>Likelihood</th>
<th>Count</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very likely</td>
<td>89</td>
<td>50.7%</td>
</tr>
<tr>
<td>Not sure</td>
<td>67</td>
<td>31.8%</td>
</tr>
<tr>
<td>Not likely</td>
<td>24</td>
<td>13.4%</td>
</tr>
<tr>
<td>Other</td>
<td>7</td>
<td>3.9%</td>
</tr>
</tbody>
</table>
Currently working on...

2. Pilot Broadcast & Recording of May RAN

- May 2015 RAN will be live broadcast and available for later viewing on the web via Adobe Connect
- ITS is providing this service as a special courtesy to the research and sponsored programs administrative communities
- Remote attendees will be surveyed for feedback about their experience
Upcoming and ongoing work...

1. Facilitate a blog/forum/email group for Research Administrators to interact with one another

2. Continue to plan and execute engaging and relevant RAN meetings (send your ideas to ran-plans@umich.edu)

3. Provide input to assist in the development of the new Research Enterprise websites

4. Recommend content and propose ideas for the Research Administration Post (The RAP) newsletter
Effective communication requires getting the right information to the right people at the right time.

What would you like to see this committee focus on?
Communications Plan - Uniform Guidance

As part of the rollout for the Uniform Guidance, we will rollout communications according to the messaging detail needed, and implement as shown below.

Content Hierarchy / Messaging Detail Guide


II - Consideration Layer: High-level messaging on website channel landing pages, targeted newsletter articles. Meeting presentations for groups of 20-200. Slightly more detail. Must be framed with context for those who know the process and may want to know more.


Implementation

<table>
<thead>
<tr>
<th>Communication Method/Tool</th>
<th>Target Audience</th>
<th>Target Date(s)</th>
<th>Messaging Detail</th>
</tr>
</thead>
<tbody>
<tr>
<td>University Record</td>
<td>Broad.</td>
<td>April 1 and April 6</td>
<td>Level I detail:</td>
</tr>
<tr>
<td></td>
<td>University community and external parties.</td>
<td></td>
<td>● What is the Uniform Guidance?</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>● What is the Task Force?</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>● How is U-M addressing?</td>
</tr>
<tr>
<td>ORSP Website</td>
<td>Broad to specific.</td>
<td>Live since April 2014. Continuing to update and enhance.</td>
<td>Level I detail:</td>
</tr>
<tr>
<td>--------------</td>
<td>-------------------</td>
<td>-----------------------------------------------------</td>
<td>---------------</td>
</tr>
<tr>
<td><em>Will also include Finance, Procurement and Sponsored Programs websites, Research and UMich Gateway website updates and Inside Finance newsletters</em></td>
<td>University community and external parties.</td>
<td></td>
<td>● What is UG?</td>
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<td></td>
<td></td>
<td></td>
<td>● What is the Task Force?</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>● How is U-M addressing?</td>
</tr>
<tr>
<td>RAP, RAPid and other newsletters to units</td>
<td>More specific.</td>
<td>April - May</td>
<td>AND Level II Detail:</td>
</tr>
<tr>
<td><em>Meeting Presentations (RAD, BAG, Website, RAAC EC, RAAC and School/College/Unit Meetings, Internal Meetings)</em></td>
<td>University community (external and internal)</td>
<td>1. Tues, April 14, 3:30-5:00pm - RAAC EC</td>
<td>● What is different (High-level)?</td>
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<tr>
<td></td>
<td>Faculty and Units who need to know</td>
<td>2. Tues, April 21, 3-4:30pm - RAAC-at-large</td>
<td>● How will I find out more if I think I may be affected?</td>
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<tr>
<td></td>
<td></td>
<td>3. Tues, April 28, 2-4pm - Engineering RAN</td>
<td>Level II detail:</td>
</tr>
<tr>
<td></td>
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<td>4. Mon, May 4, 2-3:30pm - RAN, with small Q&amp;A</td>
<td>● What is different (High-level)?</td>
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<tr>
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<td>5. Fri, May 8, 3-3:30pm - SSCRAG Meeting</td>
<td>● How will I find out more if I think I may be affected?</td>
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<td>6. Wed, May 13, 9-10 - Research Policies Committee</td>
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<td>7. Wed, May 13, 10-11:30 - Medical School GPAC</td>
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<td>8. Wed, May 20, 1:30-2:30, LSA</td>
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<td></td>
<td>9. ISR, other? (TBD)</td>
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<td>10. ORSP Staff (TBD)</td>
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<td>11. Sponsored Programs (TBD)</td>
<td></td>
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<tr>
<td>Info Sessions</td>
<td>Research Administrators and Central Offices directly impacted by changes</td>
<td>May-June TBD</td>
<td>Level III detail: How are processes changing? What is different?</td>
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<td>------------------------------------------------------------------</td>
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<tr>
<td>1-1.5 hour Q&amp;A Sessions</td>
<td></td>
<td>1. Detailed Info Session 1-TBD</td>
<td>● Admin/Clerical Salaries</td>
</tr>
<tr>
<td>Brochure/Cheat Sheet</td>
<td>Research Administrators and Central Offices directly impacted by changes</td>
<td>2. Detailed Info Session 2-TBD</td>
<td>● Allowable Activities</td>
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<tr>
<td></td>
<td></td>
<td>3. Detailed Info Session 3-TBD</td>
<td>● Computing Devices</td>
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<td></td>
<td>4. Detailed Info Session 4-TBD</td>
<td>● Closeout</td>
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<td></td>
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<td></td>
<td>● Cost Principles</td>
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<td></td>
<td></td>
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<td>● Cost Sharing</td>
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<td></td>
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<td></td>
<td>● PI Absences/Changes</td>
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<td></td>
<td></td>
<td></td>
<td>● Prior Approvals</td>
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<td></td>
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<td>● Purchasing</td>
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<td></td>
<td></td>
<td></td>
<td>● Subawards/Subrecipient Monitoring</td>
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MIDAR Introduction

RAAC Meeting: 4/21/2015
MIDAR

- Michigan Informational Dashboard for the Administration of Research

- Capital Funding Request for FY16
  - “Seed Money” provided for Proof of Concept at beginning of FY16
  - If successful, full funding request expected later in FY16
Why MIDAR?

- Two separate national surveys show federally sponsored researcher administrative burden at 42%
  - 10 minutes per week for PIs and Project Teams would redirect $2 million per year to research mission

- Lab Safety Audit Deficiencies

- Additional compliance risks due to lack of integrated data across research administration
MIDAR Components

- PI Portal
- Award Management
- Data Integration
- IRB System Update/Redesign
- Lab Safety Implementation/Integration
PI Portal

- Regulatory Management
  - IRB
  - Biosafety
  - Repositories
- Proposal Management
  - Grant Proposals
  - Unfunded Agreements
  - Budgets
  - Export Controls
- Animal Management
  - Animal Approval
  - Animal Care/Use
  - Controlled Substances
- Conflict of Interest Management
  - Disclosures
  - Management Plans

Data Integration

Award Management

- Lab Safety
- Training
  - M-Learning
  - MyLINC
  - Other LMSs?

Finance Data, HR Data, Space Data, M-Reports, Etc.
PI Portal

“Artist’s Rendering”
<table>
<thead>
<tr>
<th>Award</th>
<th>Budget</th>
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![Image](image)
Proof of Concept Requirements

1. Technical Proof of Concept
   - Show that the data can be integrated in a way to make the Portal Transactional

2. Solution Architecture

3. Additional validation of need from user community (i.e., PIs, Research Admins)