Research Administration Advisory Council (RAAC)
Committee-at-Large

Tuesday, November 28, 2023, 3:00 – 4:30 pm
Zoom Meeting

MINUTES

Attendees:

Karen Alameddine – ORSP	**Pete Gerard** – Sponsored Programs / OCA	**Carolyn Pappas** – ITS
Kris Beckon – Sponsored Programs	**Stephanie Hensel** – Education	**Lisa Parker** – Nursing
Cheri Brooks – ISR	**Jennifer Huntington** – ISR	**Susan Powell** – Engineering
Jodi Caviani – Social Work	**Kim Jacobson** – ITS	**Nick Prieur** – ISR
Mandie Chapman – ITS	**Kirby Jewell** – Ford School	**Polly Simms** – ORSP
Constance Colthorp – ORSP	**Laura Kaminski** – Ford School	**Angie Skellie** – OVPR
James Craven – SEAS	**Melissa Karby** – OVPR	**Danielle Smith** – LSI
Kerri Cross – ISR	**Karen Kirchner** – Nursing	**Kaileigh Stuchlik** – Medical School
Scott Culver – SEAS	**Jennifer Klimowicz** – U-M Flint	**Maggie Swift** – Corp. Research Alliances
Cindy Dames – ORSP	**Mindy LaRocca** – SPH	**Tabita Szabo** – Education
Jackie Dani – U-M Dearborn	**Cathy Liebowitz** – ISR	**Debbie Talley** – Sponsored Programs
Missy Denny – LSA	**Jennifer Linzmeier** – Dentistry	**Sheree Temple** – Pharmacy
Lori Deromedi – OVPR	**Adam Mall** – Sponsored Programs	**Anne Thomson** – LSA
Chris DeVries – RAAC	**Charlie Mattison** – ISR	**Pat Turnbull** – U-M Dearborn
Kathy Devereux – OVPR	**Leigh McGrath** – U-M Dearborn	**Bryan VanSickle** – Sponsored Programs
Joanne DeVore – U-M Flint	**Cedric Miller** – SPH	**Corene Weiland** – Education
Laura Dickey – ORSP	**Melissa Milligan** – LSA	**Shandra White** – ORSP
Khaled Eid – Sponsored Programs / OCA	**Becky O'Brien** – Information	**Rick Wintergerst** – Engineering
Stephanie Ford – Engineering	**Heather Offhaus** – Medical School	One unidentified phone caller
Lia Floreno – ORSP	**Lauren Orleman** – SPH	

1. **Welcome** (*Shandra White*)
    Shandra welcomed everyone to the meeting.

2. **ORSP Update** (*Karen Alameddine*)
    Karen provided the ORSP update and began with a reminder to plan ahead for the U-M end-of-year season days. ORSP and will closed for business starting 2pm on Friday, December 22, 2023 and reopen at 8 a.m. on Tuesday, January 2, 2024. We encourage U-M research project teams to plan proposal submissions appropriately based on the deadline policy. A RAP was sent with the office closing and deadline policy dates.

In terms of staffing, ORSP is currently interviewing for a Senior Project Manager, a Director, Operations & Administration, and an Associate Director, eRA Systems. We have welcomed the following new hires: Lia Floreno - Training Manager; Kristy Reeves - Asst. Project Representative - Private Blue Team; Sunita Chowfin - Project Representative - Private Maize Team; Joey Burns - Project Representative - Government Team; Four Pre-award Officers (one on-board, three starting 12/4/23) - Zach Brady, Leigh Fletcher, Rob Krasa, and Kristin Waterbury; and we have welcomed Luke Bowker to the Support Staff Team, starting 12/4/23.

3.   **NIH Subcontract Discussion** (*Khaled Eid*)
    Khaled reviewed the NIH changes to section 15.2 (Administrative and Other Requirements) that are effective January 1, 2024. These changes pertain to the [NIH Notice NOT-OD-23-182 Final Updated Policy Guidance for Subaward/Consortium Written Agreements](#) document that Khaled shared with the group.
1. NIH expects recipients to ask potential subrecipients, at the application stage, to submit language in their letters of support indicating their awareness of these requirements and the subrecipient's willingness to abide by all requirements should an award be issued.
    ○ Khaled noted that this has been incorporated into the [Subrecipient Statement of Collaborative Intent Form](#), which may be found on the ORSP website.
2. If a subrecipient is unwilling to accept the requirements outlined in this section, by signing a written agreement, then an agreement cannot be issued.
    ○ Khaled mentioned that for existing agreements with foreign subrecipients, OCA will be creating amendments to include this requirement.
3. For foreign subrecipients, a provision requiring the foreign subrecipient to provide access to copies of all lab notebooks, all data, and all documentation that supports the research outcomes as described in the progress report, to the primary recipient with a frequency of no less than once per year, in alignment with the timing requirements for Research Performance Progress Report (RPPR) submission. Such access may be entirely electronic.
    ○ Khaled noted that this provision is new and is also unique to foreign subcontracts. OCA has developed a set of expectations and guidelines in response to the policy guidance, and the requirements for the PI and OCA are shown below.

PI requirements
- It is PI responsibility to have access to subrecipient lab notebooks, data, and other documentation that supports the research.
- PIs will need to notify OCA of situations where access was not provided.
- PIs will need to respond to OCA's annual request for attestation of subrecipient compliance.

OCA requirements
- No later than March 1, 2024 to comply.
    ○ Each sub will require "annual" technical scientific reports.
    ○ At the time of approval, or upon activating an amendment, OCA will post a comment to PI to remind PI of the requirement.
- Once a year, in line with the annual RPPR, OCA will post a comment through the SUBK record for an attestation from PI or subrecipient compliance.
- OCA will follow up on PI reports of subrecipient non-compliance. OCA will issue a

notice of non-compliance with termination notice, unless rectified.

NIH reserves the right to request copies of the written agreement and relevant supporting documentation as needed as part of its oversight responsibilities. Kathy D. asked if PIs and the Primary Research Administrator (PRA) be copied on the posted comment. Khaled answered that beyond posting a comment, they normally keep the PI and PRA out of any correspondence with the sponsor or subcontractor in terms of the negotiation. Kathy asked if this will be implemented by other sponsors as well. Khaled answered that while that is not the case at this time, it could proliferate to other sponsors.

Heather asked about the communication plan, since this process will be starting soon. Khaled responded that they are taking this to the RAAC FAC + EC meeting later this week. If changes are needed, we will make and then will communicate in a RAP. There was a follow-up question about if it is possible to let those with affected subcontracts know ahead of time. Debbie let everyone know that there is a list and it has been shared with those who have projects that are affected.

4. **Presentation:** RAAC Training Subcommittee Update (*Nick Prieur*)
    Membership:
    Since the last update, Nick has assumed the Chair role, with Melissa Li as Co-Chair. Additionally, Aaron Campbell has succeeded Jeanne Haney, representing Sponsored Programs; Lia Floreno joined, representing ORSP; Jonah Lee joined the group, representing the Animal Care and Use Office (ACUO); Jessica Mirelez from the Medical School stepped away from the subcommittee.

    Navigate Updates
    Instructor-led courses:
    - Fundamentals - Completed November 15 with 37 attendees. Evaluating surveys.
    - Advanced Budgeting: Task-Based/Hourly Budgets - Ended October 10 and had 14 participants with a 98% satisfaction rate.
    - Subs of All Kinds - Scheduled for November 30 and December 5 with 40 people registered.
    - Budgeting Basics - Scheduled for November 29 and December 6 with 21 people registered.

    Webinars:
    - Working with ORSP to Process Data Use Agreement - Completed on October 19 with 124 attendees with satisfaction rate of 99%
    - Non-Financial Federal Sponsor Reporting and eRPM Manage Deliverables - Completed on
    - November 1 with 87 attendees with a satisfaction rate of 99%.
    - Cost Sharing: If you must, here are important things to know - Scheduled on December 7 with Heather Offhaus and Melissa Karby presenting. Registration closes December 6.

    E-ssentials eLearning Modules:
    There are currently 19 modules in the catalog of eLearning modules. A Certificate of Achievement is available in MyLINC upon completion of the eLearning modules and for all other courses as well.

    RAMP↑:
    The 8th cohort is underway and we have 13 mentor-mentee pairs. A new group was created

for Group Mentoring for Emerging RAs and there are six mentors and six mentees in that cohort. A series of networking sessions will complement the mentoring efforts. The first group mentoring session happened this week. Nick thanked Melissa Li and Chris DeVries for taking the lead on this cohort and for piloting the new Group Mentoring for Emerging RAs cohort.

In Development:
- Key Personnel - To provide best practices for managing Key Personnel on AWD records and making requirements from sponsor and ORSP clearer. Slides are finalized, eLearning module is built, and will be published in December.
- Core Management: Goal is to develop content to assist RAs who manage cores, particular the annual renewal cycle, and also provide best practices for core financial management/ monitoring. Looking to get out soon.

RAN:
RAAC Training was the focus of the October 27, 2023 RAN Meeting. We solicited feedback and ideas from the RA community on training opportunities, resources, gaps, or areas for improvement. RAAC Training will analyze the results in December and use the data to work towards potential new training topics. The survey to collect responses is still open and was also communicated in the most recent RAP that came out yesterday.

Becky asked when the next cohort of *Fundamentals* will be offered and if it is known when the enrollment for that cohort will open. Nick responded that it will be offered sometime in Spring 2024, but the exact cohort and enrollment dates have not been finalized.

5. **ITS Update** (*Carolyn Pappas*)
Carolyn let the group know that the next eRPM Release will be on Monday, December 11. Here are a few of the notable items in the release:
- The Award activity to manage Non-Key Personnel will always be available for project teams to make updates. Currently, we are hiding it if there is a mod in progress.
- PAFs that are in the state of "Awarded" but associated with closed Awards will be moved to the new state of "Closed." Note: Moving closed PAFs to the new state will be done over the next week. There are thousands of them. This will have a positive impact to Reporting and using the search functionality in eRPM.
- Updates to Question 1.2. Carolyn provided a demonstration related to removing the "both" option, or option C. New third option is to indicate if the proposal is a subsequent PAF on an existing award.
- Document uploaders: The uploaders in the Agreement Acceptance Request (AAR) have been revised to look the same (e.g., column headings) as other projects, such as the PAF and UFA.
- Friends accounts: ITS is tightening security on Friends accounts in all eResearch systems, and they are strongly suggesting the use of Sponsored Accounts. If you have to use a Friends account then you must add the person to the PAF first before they log into eRPM.

Kathy asked about cleaning up UFAs and if there has been any discussion about this, since many were created by people that are no longer at U-M. Carolyn responded that this could be part of a larger project within RAAC Process. This is something that can be explored, but will need ORSP and unit input.

6.   **Sponsored Programs Update** (*Debbie Talley*)

Debbie thanked everyone for their efforts in getting reports into Sponsored Programs. There are still less than 50% of reports submitted and Sponsored Programs will need them by December 14 in order to get the FSRs completed.

Sponsored Programs will be closed Friday, December 22 at 2 p.m. returning at 8 a.m. on Tuesday, January 2, 2024. We will not be doing invoices during this time, so that is why it's important to submit reports before December 14th.

7.   **M-Reports Modernization Update** (*Mandie Chapman*)

Mandie shared information about the timeline and plan for the overall project. The first update to M-Reports is a rebrand and modernization to make the user interface more accessible. We can then focus on the technology to develop the reports being replaced.

Mandie reminded the group about the phases of the project:
   ● Phase I: UI Modernization - targeting January 18, 2024.
   ● Phase II: MReports Platform Modernization
       ○ Communications for Phase II are planned to begin in January/February 2024.
   ● Phase III: Data Security Modernization

Phase I:

There are light changes to the user interface for better accessibility and align more with U-M branding requirements. Most notably, ITS took out the left-hand navigation panel for better accessibility. Mandie thanked everyone who tested and provided feedback. Adjustments have been made based on feedback (colors, consistent fonts, accessibility, etc.). There was significant feedback related to the scrollbar being removed, so ITS is looking for feedback. Mandie presented four options for the scrollbar, based on user feedback and what is possible in the system:
   1.   Add navigation text help
   2.   Fix the height of the report
   3.   Add a secondary scroll bar overlay
   4.   Add a full page report option

Some additional points about the options:
   ● Add navigation text help for scrolling options:
       ○ You can use your keyboard's arrow keys to scroll left to right.
       ○ You can hold "shift" and use your mouse.
       ○ On trackpad, use two fingers and move them left or right to scroll
   ● Could use a fixed height where the scroll bar is always present and clipped to smaller windows.
   ● Could have a secondary scroll bar at the bottom that would always be present. Not sure how much effort this option would take.
   ● Have a full-screen option with the horizontal scroll bar always there.

Mandie provided the survey to the group and will also have Chris circulate it after the meeting. You may email her if you have any comments/questions, Mandie asked for responses to the survey within 10-14 days. ITS is working on a timeline for the new look and scroll bar functionality, so this will help them stay on-track.

Chris let everyone know that, especially for the attendees from the M-Reports Workgroup, as Mandie shared, the ITS timeline on the project has expanded significantly. That is the reason why the workgroup has not received communications from Chris. At this point, ITS is still working on the UI updates, and as Mandie shared, the next phase (MReports Platform Modernization) will not begin until into the new year. Chris will be sure to provide updates as he receives them from the ITS team.

The meeting ended at 4:10 p.m.

RAAC Committee-At-Large Meeting Dates (*all meetings 3:00-4:30 p.m., unless otherwise noted*)
- *No December 2023 meeting*
- *No January 2024 meeting*
- February 20, 2024 (*Cathy Liebowitz*, RAAC Communications Subcommittee)

Executive Committee Meetings (*all meetings 3:30-5:00 p.m., unless otherwise noted*)
- Tuesday, December 12, 2023
- Tuesday, January 9, 2024
- Tuesday, February 13, 2024

RAAC Training Subcommittee Update

RAAC Committee-at-Large Meeting
November 28, 2023
Nick Prieur, Research Administration Senior Manager, ISR

RAAC Training Membership

Mindy Alguire – *LSA*

Amy Brooks – *Engineering*

Betsy Brouhard – *Medical School*

Aaron Campbell – *Sponsored Programs*

Kate Chie – *ORSP*

Laura Coddington – *ORSP / Spon. Prog.*

Lori Deromedi – *OVPR*

Chris DeVries – *RAAC*

Lia Floreno – *ORSP*

Lyn Fyfe – *ORSP / Sponsored Programs*

Cathy Howell – *SPH*

Kirby Jewell – *Ford School*

Patrick Lagua – *Dentistry*

Jonah Lee – *Animal Care & Use Office*

Melissa Li – *Medical School (Co-Chair)*

Susan Powell – *Engineering*

Nick Prieur – *ISR (Chair)*

Raquel Silvius – *ORSP / Sponsored Prog.*

Pat Turnbull – *U-M Dearborn*

Corene Weiland – *Education*

Since the last update in May 2023, Nick Prieur has taken the Chair role, Melissa Li has taken the Co-Chair role, Aaron Campbell has succeeded Jeanne Haney, Lia Floreno has joined from ORSP, and Jonah Lee has joined from ACUO. Additionally, Jessica Mirelez has stepped down from the group, and we are grateful for her service!

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Navigate Updates

RAAC Training Subcommittee Update
November 28, 2023

Navigate Updates

M | NAVIGATE

Instructor-Led Courses

Navigate: Fundamentals

- The most recent course was completed on November 15, 2023.
- There were **37 attendees**; satisfaction rate not available yet.

Navigate: Advanced Budgeting Task-Based/Hourly Budgets

- The pilot course ended on October 10, 2023, and we had **14 participants** in the two half-day sessions. Pilot course had a **satisfaction rate of 98%**

Navigate Updates

Instructor-Led Courses

Navigate: Subs of All Kinds

- The next course will take place over two half-days – November 30 and December 5, 2023.
- There are **40 people registered** for the course.

Navigate: Budgeting Basics for Sponsored Projects

- Course starts tomorrow, November 29, and will conclude on December 6, 2023.
- There are **21 people registered** for the course.

Navigate Updates

Webinars – Completed

Working with ORSP to Process Data Use Agreements

- **October 19, 2023** – Michele Quick (ORSP) and Gabrielle Hammoud (ORSP) presented.
- There were **124 attendees** and a **satisfaction rate of 99%**.

Non-Financial Federal Sponsor Reporting and eRPM Manage Deliverables

- **November 1, 2023** – Amy Brooks (Engineering) and Amanda Reel (ORSP) are presenting.
- There were **87 attendees** and a **satisfaction rate of 99%**.

Navigate Updates

Webinars – Upcoming

Cost Sharing: If you must, here are important things to know.

- **December 7, 2023** (registration closes **December 6, 2023 at 12:00 p.m.**)
- Heather Offhaus (Medical School) and Melissa Karby (OVPR) are presenting.

Reminder

E-ssentials eLearning Modules

- There are currently 19 modules in the eLearning catalog.

A ***Certificate of Achievement*** is available in MyLINC upon completion of a eLearning module and / or an instructor-led course.

Project Updates

Research Administration Mentoring Program (RAMP↑)

- We have assembled and launched the 8th RAMP↑ cohort.

- There are 13 mentor-mentee pairs.

- In addition, a new mechanism, Group Mentoring for Emerging RAs, was created. There are 6 mentors and 6 mentees.

- A series of networking sessions will compliment the mentoring efforts.

- Thanks to Melissa Li for taking the lead on this!

Project Updates

Resource Development

Key Personnel

- Goal is to provide best practices for managing Key Personnel on AWD records and making requirements for Key personnel from sponsor- and ORSP - side clearer.
- The subcommittee has finalized the slides, eLearning module is built, and it will be published in December.

Project Updates

Resource Development

Core Management

- Goal is to develop content to assist RAs who manage cores, particularly the annual renewal cycle and also provide best practices for core financial management/monitoring.
- Currently, the group is developing materials to assist with the recharge rate request and renewal process.
- Hoping for go-live in 2024 but changes in the core management environment may delay this

Project Updates

October 24, 2023 RAN Meeting

RAAC Training Focus

- Not only did we use the meeting to introduce the RAAC Training team to the RA Community, we also solicited feedback/ideas from the RA community on training opportunities/resources/gaps
- RAAC Training will analyze the results in December and use the data to work towards potential new training topics
- Form for collecting responses is still open and in the most recent RAP that came out yesterday

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Questions / Feedback?

MReports Modernization Project
RAAC Committee Meeting
November 2023

Presenters:
Mandie Chapman, Data Coordination Manager; ITS-Data Science Practice

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Agenda: MReports Modernization Project Update

- UI Modernization: Winter 2024 *(Current Target: 1/18/24)*
- Communications for Phase II: January/February 2024
- Review Feedback from QA/testing the new UI
  - Scroll Bar

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Project Overview

Phase 1

User Accessibility Modernization: Light User Interface enhancements that significantly improve user accessibility & align with U–M branding

Phase 2

MReports Platform Modernization: To better support our user community's reporting requirements, we will modernize the MReports service.
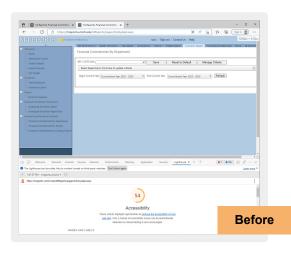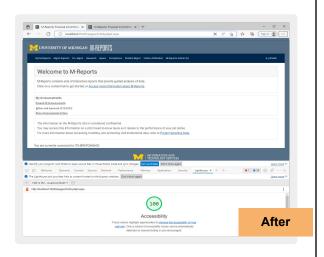
Data Security Modernization: Shifting towards a more open and modern security model while maintaining privacy where it's most needed.

Phase I: UI Modernization

Coming in Winter 2024

Before

After

Feedback Summary

THANK YOU! Your feedback is essential and appreciated.

• Digital UX Team review: standardize color palettes, more contrast, more highlighting →	Adding branded colors, recommended and consistent fonts, and accessibility highlighting standards. These changes will be subtle.
• Header takes up too much space / takes up half of the screen with certain views →	Reduced header footprint.
• Font is too light/hard to read/ not enough contrast →	Standardized font and increased size and contrast. Working on implementing this inside reports as well.
• Searching in the Criteria Bar, couldn't find PG / list clipping / can't scroll in lists →	This was a bug and has been corrected; search bar scrolling now works properly and displays appropriately
• Scroll bar at the bottom is hard to get to / can't find scroll bar for big reports / →	Generated four options for discussion and feedback.

Scroll Bar: Four Ideas

Dude, where's my scroll bar?

1. Add navigation text help
2. Fix the height of the report
3. Add a secondary scrollbar overlay
4. Add a full page report option

UI/Scroll Bar: Add explanatory text

Navigation Tips for left/right scrolling:
1. You can use your keyboard's arrow keys to scroll left and right
2. You can hold "Shift" and use your mouse wheel to scroll left and right.
3. On a trackpad, use two fingers and move them left or right to scroll.

UI/Scroll Bar: Fixed Height

UI/Scroll Bar: Secondary Scroll Bar

UI/Scroll Bar: Full Screen

Scroll Bar: Four Ideas

Discuss:

1. Add navigation text help
2. Fix the height of the report
3. Add a secondary scrollbar overlay
4. Add a full page report option

Which do you think are workable?
Why or why not?

Take a minute and let us know please!

https://take.supersurvey.com/poll5009783x31CA4A43-153

Questions?

We'd love to hear from you! Contact us at
MReportsModernization@umich.edu