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UFIRST Agenda

Week 1

Day 1 – July 15th
- Project Kickoff
  - Team introductions
  - Project introduction
- Review peer demos
  - WISPER
  - ARGIS
  - Click

Day 2 – July 16th
SME’s invited: Division of Research Program Development
- Lifecycle outline/flow
- Recap limited & internal applications
- Proposal Development

Day 3 – July 17th
- Proposal Development Continued
  - Do we need support for proposal forms creation? What should the tool facilitate?
  - Exceptions:
    - Do things differ when it is multi-unit? Multi-site?
    - Clinical Trials
    - Other variables
  - What worklist items do you need? Tracking tools? Reminders?
  - What related processes are there?
  - What rules/controls are specific to your department?
  - What security is needed on the data/documents?
  - What documents need to be stored?
  - What alerts are needed?
  - What reports can be provided?

Day 4 – July 18th
- Proposal Routing
  - Current state
    - Who approves what?
      - PI
      - Dept Support
      - Chair
      - Dean Support
      - Dean
      - DSP
    - What are they looking at?
    - What value does each step add to the process?
    - What are they validating?
    - What compliance reviews are happening?
    - Do people have checklists of things to confirm or decision trees?
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- Is there repeated/duplication in what we hear?
- Exceptions:
  - Do things differ when it is multi-unit? Multi-site?
  - Clinical Trials
  - Other variables
  - Internal vs external
  - New vs modification
- What isn’t working now?
  - Recap & prep

Week 2

Day 1 – July 29th
- Recap & Prep
- Proposal Routing
  - Future State
    - Roles and Responsibilities
    - Who needs to sign?
    - What does the signatory need to be presented with? How?
    - Is there a required order?
    - Do they need the whole proposal or just parts?
      - If parts – what parts?
    - What needs to happen at proposal or can wait until award?
  - Exceptions/Differences
    - Do things differ when it is multi-unit? Multi-site?
    - Clinical Trials
    - Other variables
    - External vs internal; new vs modification
  - What security is needed?
  - What compliance reviews are happening?

Day 2 – July 30th
- Proposal Routing
  - Future State Continued
    - What alerts are needed?
    - What reports can be provided?
    - What worklist items do you need? Tracking tools? Reminders?

Day 3 – July 31st
- Work list and notification requirements & search
  - PI, Dept Support, Chair, Dean’s Support, Dean, RPRD, DSP
  - How do people want to be presented with information?

Day 4 – August 1st
- Post submission documents & data collection
  - Ad hoc routing or approving of information
  - What kinds of documents are requested after submission, but before award/agreement arrives?
  - Roles and responsibilities
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- Are there any additional approvals?
- How is the need to provide or review information communicated?
- Are there negotiations at this stage?
- What alerts are necessary
  - Agreement/negotiations Tracking
  - Recap & Prep

Week 3

Day 1 – August 12th
- Recap & Prep
- Award Set up
  - Award set up overview
  - What approvals are needed at this stage?
  - What happens if funding does not match the proposal?
  - What alerts are needed?
  - What needs to be communicated out to departments?
  - What information needs to be tracked?
  - What compliance information needs to be recorded?
  - What are the outputs?

Day 2 – August 13th
- Award Set up
  - What security needs to be in place? What documents need to be stored?
  - What integrations points are needed?
    - To C&G? Other?

Day 3 – August 14th
- Award modifications
  - Award modification overview
  - What are the pre-requisites?
  - Are there set points in time these need to happen?
  - How do you know when?
  - What approvals need to happen?
  - What type of information would make a modification necessary?
  - What types of changes would need re-approval?
  - What integrations points are needed?
    - To C&G? , Other?

Day 4 – August 15th
- Prior approvals
  - Subawards
  - No cost extensions
  - Key personnel changes
  - Equipment, alterations & renovations
  - CAS
- Closeout
- Recap & Prep
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Week 4

Day 1 – August 19th

- Recap & Prep
- Subawards
  - Subaward Overview
  - What communications are necessary?
  - What approvals are necessary?
  - What security is needed?
  - What documents are stored?
  - What alerts are needed?
  - Are there any compliance needs?
  - Is there anything different that needs to be tracked here?

- Document Management
  - Document management overview
  - Your current document management process
  - What security is needed on documents?
  - Who does the scanning?
    - One designated person
    - Each person individually

Day 2 – August 20th

- Reporting requirements
  - What type of information do you hope to get out of a system
  - What type of information would you like to search for? How about emailed?
  - What types of reports would you like to see?
    - Frequency (Daily, Weekly, Monthly, Quarterly, Summaries)
  - What security should be there on reports?
- Reports or other outputs
  - What reports would each stakeholder want?
  - How?
  - What other documents/outputs would be useful? (biosketch)

- Integration
  - What tools are you using that we need to keep in mind or would be useful to bring in (i.e. Cayuse)?
  - At what point in the process are you using this information?
  - What do you go look up somewhere else and then use that information?
  - What information are you putting/loading somewhere else?

Day 3 – August 21th

- Security and Profile Requirements
  - What roles do you know of now that need to be identified?
  - What Groups?
  - Who can modify roles? Groups? Permissions?
  - What type of hierarchy do you need?
  - What level should security be on?

Day 4 – August 22th

- RECAP