

UFIRST

University of Florida Integrated Research Support Tool

Process Sessions Details

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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