Fundamentals of Research Administration

Office of Research Administration
Sharon Levine-Sealy, Pre-Award Director
Elliot Feder, Post-Award Director
Agenda – PACS

- What is a Grants Management System?
- SUNY Pre-Award and Compliance Software (PACS)
- Advantages of Huron Click
- Advantages to the Research Community
- Onboarding Timeline
- Training and Go-Live
What is a Grants Management System?

- Software program or application that assists fund-seeking organizations such as non-profits and universities in administering and automating the grant process

- Captures and tracks grant proposals
- Captures award data
Pre–Award and Compliance Software (PACS)

- SUNY PACS is a multi–year collaborative project to implement Huron's online "Click Portal" solution to support PIs, Students, Compliance and Research Administration staff

- The platform follows the Research Administration process from cradle to grave, allowing us to achieve a new level of uniformity and efficiency
SUNY project goals include:

- Reducing the administrative burden on our researchers so they can devote their time to research

- Assisting the campuses to generate a higher volume of quality, compliant, collaborative, and multi-disciplinary grant proposals
Advantages of this system:

- Provide an intuitive and easy to use system
- Reduce investigator / coordinator effort on protocol creation and submission
- Leverage existing campus credentials for single-sign-on technologies
- Reduce turnaround times
- Create administrative efficiencies for research investigators and their staff members
Other Advantages – Huron Click

- Simple Budget Preparation
- Internal Routing
- Integration
- PI Dashboard
- Accessible off-site
- S2S Grant submissions
Huron Click will...

- Streamline effort and processing time for IRB, Safety and IACUC protocol creation and submission
- Streamline effort and processing time for FCOI's
- Provide a Grants Management module that has a consistent look and feel across all modules
- Efficient development of Research Agreements
- Enhanced reporting capabilities for all aspects of Research Administration
- A user interface that is intuitive and easy to use
Will automate the submission, review and approval processes

Manage all major administrative aspects of the research and compliance lifecycle

- Proposal Development and Submission
- Contract Negotiations
- Award setup
- Award management
- Project closeout
Huron Click –

- The system integrates the following aspects of grants management into a single system using the following modules:
  - Agreements
  - IRB
  - COI
  - IACUC
  - Safety
  - Grants
Agreements Round One Onboarding Timeline

Initiation Phase
9/6/2016 - 10/31/2016

Kickoff Meeting - 9/20/16 and 9/21/2016

Status Meeting 1
10/5/2016

Status Meeting 2
10/20/2016

Status Meeting 3
10/26/2016

Training Delivery Phase
11/1/2016 - 11/30/2016

Training Materials Completed
10/31/2016

Training Delivery Completed
11/30/2016

Rollout Ready Phase
12/1/2016 - 12/17/2016

Campus Rollout Ready QA Session
12/12/2016

^ TIMELINE INFORMATION ^ To access information about each phase in the timeline (including a link to all documents for that phase), click on that phase bar, then click 'Open.'
IRB Round One Onboarding Timeline

Initiation Phase 9/6 - 10/31
Kickoff Meeting - 9/20/16 and 9/21
Status Meeting 1 10/5
Status Meeting 2 10/19
Status Meeting 3 10/26
Training Materials Completed 10/31

November 2016
Training Delivery Phase 11/1 - 11/30
Training Delivery Completed 11/30

December 2016
Rollout Ready Phase 12/1 - 12/17
Campus Rollout Ready QA Session 12/12

^ TIMELINE INFORMATION ^ To access information about each phase in the timeline (including a link to all documents for that phase), click on that phase bar, then click 'Open.'
COI Onboarding Timeline

COI Round One Onboarding Timeline

- Initiation Phase: 9/6 - 10/31
  - Kickoff Meeting: 9/20/16 and 9/21
  - Status Meeting 1: 10/5
  - Status Meeting 2: 10/19
  - Status Meeting 3: 10/26

- Training Delivery Phase: 11/1 - 11/30
  - Training Materials Completed: 10/31

- Rollout Ready Phase: 12/1 - 12/17
  - Training Delivery Completed: 11/30
  - Campus Rollout Ready QA Session: 12/12

^ TIMELINE INFORMATION ^ To access information about each phase in the timeline (including a link to all documents for that phase), click on that phase bar, then click ‘Open.’
**Safety Adoption Timeline**

**Initiation Phase**  
9/26 - 9/30

**Testing Phase**  
9/30 - 11/30

**Training Planning Phase**  
11/4 - 11/7

**Rollout Ready Phase**  
11/30 - 12/16

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**Campus Planning Worksheet Sent**  
9/19

**Kickoff Meeting**  
9/29

**Status Meeting 1**  
10/4

**Test Kickoff**  
10/4

**Test Training Sessions Begin**  
10/5

**Status Meeting 2**  
10/27

**End Test Training Sessions**  
10/28

**Start Structured Testing**  
10/31

**Status Meeting 3**  
11/10

**End Structured Testing**  
11/11

**Complete Training Discovery Calls**  
11/16

**Complete Training Approach Document**  
11/29

**Complete Review of Training Approach**  
11/30

**Finalize Campus Training Approach**  
12/2

**Status Call 4**  
12/4

**Module Rollout Ready for Participating Campuses**  
12/16

**End Campus Rollout Ready QA Sessions**  
12/15
Roll – Out Ready

- The SUNY and RF Central responsibility

- It’s the part of the process where the system is being loaded with campus specific data:
  - Person records are loaded
  - Records associated with the necessary system roles
  - System-wide notifications in place
  - Legacy Data converted into the system
Go-Live Stage

- A campus responsibility and at the sole discretion and control of the campus
- Module-specific

The part of the process relative to timing, implementation, planning and delivery

- End-users will be trained in using the system
- Business transactions will be recorded in the system
The lifecycle contains three distinct phases:

- **Lead campus (UB)** - represents the activity necessary to define (harmonize), develop, test, train, implement and stabilize a module at the lead campus.

- **Adoption** - represents the activity necessary to collect and enter campus configuration data in the system, test a module in a shared instance and confirm that the module is Rollout Ready for each committed campus.

- **Onboarding (Rounds 1 and 2)** - represents the activity to onboard all campuses who have not committed to participate in the Adoption phase. Onboarding consists of collecting and entering campus configuration data in the system and confirming that the module is Rollout Ready for each on-boarded campus.
Module Lifecycle Graph

- Lead (UB)
- Adoption
- Onboarding Round 1
- Onboarding Round 2
<table>
<thead>
<tr>
<th>MONDAY</th>
<th>TUESDAY</th>
<th>WEDNESDAY</th>
<th>THURSDAY</th>
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<td>9:00 am AGR 2: Administration of Agreements (Decentralized)</td>
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Training

- Train-the-Trainer approach

- Training documents are available on RFC website

- Will be shared with DMC faculty and staff several months prior to “go-live”