Agenda

- Introductions
- Announcements - Pete Paskevich
- InfoEd PD - Frank Thayer
- Recruitment & Credentialing of Professional Staff - Terry Bragg & Clara Suzanne Sooger-Evans
Announcements

- New Journal Entry Training Course
  - Dates, times & location to be announced shortly (Kim)

- Holiday Wishes! Sharing cost savings with employees reflected in December paychecks. For employees on staff on or before March 31st, 2011. Based on employee’s standard hours.
  - 30-40hs/week: $500
  - 16-20.99hs/week: $250
  - Fewer than 16hs/week: $100
InfoEd Proposal Development (PD)

McLean Hospital

12/20/11
Agenda

- Introduction
- InfoEd Proposal Development overview
  - Scope of Implementation
  - Benefits and Value
  - Impact to business process
- Training
- Next Steps
- Questions
Scope of Implementation

In Scope

- Become the single point of entry for all “NEW” proposals submitted
- Provide investigators and administrators with an online portal for preparing, submitting, approving/routing and tracking their grant applications
- Replace the Partners coversheet, budget template, manual sign off, and eGrant submission site & Conflict of Interest Forms through one seamless application
- End User Documentation, Computer Based Training (CBT) and webinars of the application for training departmental users
Scope of Implementation

Out of Scope

- Full SF424 Application Creation, Development and Submission directly to Grants.Gov
- Adobe Application Downloads or Other Sponsor Form Sets
- Automation of other Business Processes Associated with the Grants Lifecycle e.g., Progress Reports
Overview of PD

InfoEd PD Components
- Proposal Set Up Questions
- Budgeting Module
- Attachment Upload Interface
- Partners Electronic Coversheet
- eCOI Functionality
- Electronic Routing Process
Phase Benefits and Value

Greater Data Accuracy
- single source online hub for collaborative application preparation
- auto-fill utility can conveniently load standard institution specific details (e.g., fringe and F&A rates)
- records are automatically checked for completeness upon submission

Improved Budgeting Functionality
- automatically loads appropriate institutional details (e.g., institution specific fringe rates and F&A rates, etc.)
- ability to capture sponsor rules and apply data integrity rules automatically (e.g., allowable budget categories, salary caps, category caps, etc.)
- versioning functionality enables users to save multiple versions of a budget

Proposal Submission Transparency
- centralized attachment utility for supporting materials allows users to remove and update previously submitted documents.
- electronic routing and approval mechanism allows for real-time updates of who has approved or is reviewing the submitted grant proposal
Current Proposal Submission Process

**Proposition Package Includes:**
- SF424
- Partners Coversheet
- Budget Template
- COI form
- Sponsor Face page
- Other proposal elements

**Current Business Process:**

1. **PI/Grant Admin.** develops proposal for submission
2. **Department signatures obtained**
3. **PI or Grant Admin. submits proposal to RM Pre-Award staff** (Email, Fax, Mail)
4. **PI / Grant Admin and Pre-Award revise for final submission to sponsor**
5. **RM Pre-Award staff submits final proposal to sponsor**
**Impact to Current Business Process**

**InfoEd PD Proposal Submission Process After Phase 1**

**PI/Grant Admin.**
develops proposal for submission in InfoEd PD

**PI / Grant Admin and Pre-Award**
revise for final submission to sponsor

**Entered into InfoEd PD:**
- Proposal Setup Questions
- Budget Information
- Partners Coversheet

**PI/Grant Admin.**
develops proposal for submission in InfoEd PD

**RM Pre-Award staff**
submits final proposal to sponsor

**Attached documents:**
- Completed Proposal (i.e. SF424)
- COI form
- Sponsor Face page
- Other proposal elements

**Electronic routing for approval signatures**
Routing Approval Process

Draft 10 Day Proposal Review Stage

- Proposal is locked down pending PI and Chief approval
- At each stage, users have ability to approve or decline as well as add comments that are reported to the PI

Editing Stage

- Proposal is locked down once submitted for Final Route

Final 5 Day Proposal Review Stage
What does this mean for you?

- One source for all New Proposals
  - No need for shadow systems tracking proposals – instant access to proposal status – more accurate information fed into Insight i.e.
  - Other Support
  - Proposal review documented & available for reference
  - Use existing proposal for resubmissions
  - Allows for tracking changes to admin. docs (COI, sponsor forms)
What does this mean for you?

- **Electronic Routing**
  - Electronic signatures for Dept. Admin, PI and Chief(s)
  - No need to travel
  - Signatures/Approvals can be completed anywhere there is access to the internet

<table>
<thead>
<tr>
<th>Minutes required to get 1 signature</th>
<th>5-10 minutes*</th>
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<tbody>
<tr>
<td>Number of signatures needed per proposal</td>
<td>2 (PI &amp; Dept Chief)</td>
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<tr>
<td>Approximate CSL NEW Proposals FY09</td>
<td>15</td>
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<tr>
<td><strong>Potential Time Save</strong></td>
<td><strong>560 – 1120 minutes</strong></td>
</tr>
<tr>
<td></td>
<td><strong>9.3 – 18.6 hours</strong></td>
</tr>
<tr>
<td></td>
<td><strong>1 – 2 Working days</strong></td>
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</table>

* Time estimate from BWH Pilot participant
Proposal Development Training

<table>
<thead>
<tr>
<th>Title</th>
<th>Description</th>
<th>Available</th>
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<tbody>
<tr>
<td>Classroom Training Curriculum</td>
<td>“How-to” reference manual that will combine software functionality and PHS business specific rules and processes.</td>
<td>October 4th 2010</td>
</tr>
<tr>
<td>Computer Based Training Modules</td>
<td>Computer Based Training (CBT) curriculum will be based upon the Classroom Training design. The curriculum will include 5 modules covering Proposal Creation and Routing approval and include quizzes to reinforce comprehension.</td>
<td>October 4th 2010</td>
</tr>
</tbody>
</table>

Training Notes

- There are monthly classroom trainings, dates available on RM Intranet
- CBT and Webinars offered as well – information on [RM intranet](#)
- Pilot Program – test functionality with a sample of teams for feasibility
Questions or Comments?

- Contact Information

  Franklin Thayer
  fthayer@partners.org
  Phone: 617-954-9672
WHO WE ARE...

Terry Bragg, MA, MSLS – Registrar, Director of Professional Staff Affairs, Visa Consultant, Hospital Archivist/Historian

Clara Sooger-Evans – Credentialing Specialist, HMS cv specialist, Notary Public

Deborah Carver – Administrative Assistant
WHAT WE DO...

- Aid in the hiring process
- Credential staff
- Work with Partners International Office to obtain visas
- Establish HMS appointments
- Work with the Chief Academic Officer in the HMS promotions process
McLean Hospital

attending to patients and conducting research at

Required for all professional staff (M.D., Ph.D.)

Provides Professional Staff Hospital Appointment

Peer Review

Verification of education, training and licensure

Credentialing
Assists in constructing offer letter
Assists in writing and placing of job ads
and cost center
Contact in writing; provide position name, salary
Approval of new positions

Terry's role:

New Paid Staff Hiring
Please contact HR to schedule orientation

(can be completed ahead of appointment or on their first day on campus)
Provide applicant with forms for McLaren Hospital & Harper Medical School Appointment
Contact applicant to conduct CORI and Hireright background check

We will then:

- Confirmation of salary, source of salary & start date
- Letter confirming completion of degree (if newly received)
- Completed Affirmative Action Report
- Three letters of support
- Signed offer letter
- Applicant's CV

When an applicant is chosen
Non paid staff

Research Associates: Research collaborators with primary academic appointments through other institutions inside or outside of HMS.

What we need:
- Applicants cv
- Will applicant need HMS appointment?
- Start date

We will then:
- Contact applicant to conduct CORI
- Provide applicant with forms for McLean Hospital & Harvard Medical School Appointment (if applicable)
- Contact your department when CORI is approved
Non paid staff

Fellows on scholarship: Post-doctoral Fellows with funding provided by outside source

What we need:
- Applicants cv
- Complete visa packet
- Affirmative Action report

We will then:
- Obtain visa
- Complete CORI & appointment documents upon arrival
<table>
<thead>
<tr>
<th>VISA TYPE</th>
<th>STATUS</th>
<th>PROCESSING TIME</th>
<th>ELIGIBILITY</th>
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<tbody>
<tr>
<td>F-1 Student Visa</td>
<td>On OPT with Employment Authorization Card</td>
<td>Minimum of two months needed for processing</td>
<td>Open to all students enrolled in degree programs</td>
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<tr>
<td>TN</td>
<td>Work with Terms to construct Letter governed by NAFTA Appendix 1603.01</td>
<td>Minimum of six months needed for processing</td>
<td>TN Status for NAFTA professionals</td>
</tr>
<tr>
<td>J-1</td>
<td>Exchange visitor visa with several categories</td>
<td>Minimum of six months needed for processing</td>
<td>J-1 status for J-1 exchange participants</td>
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<tr>
<td>H-1B</td>
<td>Temporary work authorization with a maximum of six years</td>
<td>Minimum of six months needed for processing</td>
<td>H-1B status for Specialty workers</td>
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</table>

Student Internship:
- Obligation between student and their University International Office (We are not the Visa Sponsor)
Contact us

617-855-2183
Service Building rooms 215 & 213
Mail Stop 227
Walk in hours 1-2 (11-12 on Wednesday)

- tbragg@partners.org
- csooger-evans@partners.org
- dcarver@partners.org

Check our Brainwaves site for checklist and visa packet links in 2012!
Questions?
Contact

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respinosa@partners.org
respinosa@mclean.harvard.edu