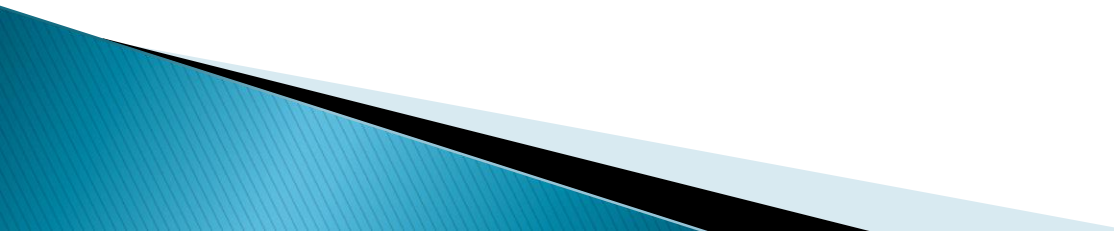


Fundamentals of Research Administration

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

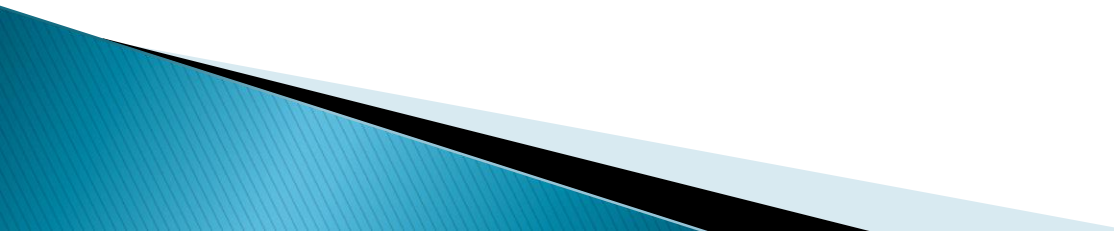
Agenda – PACS

- ▶ 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
- 

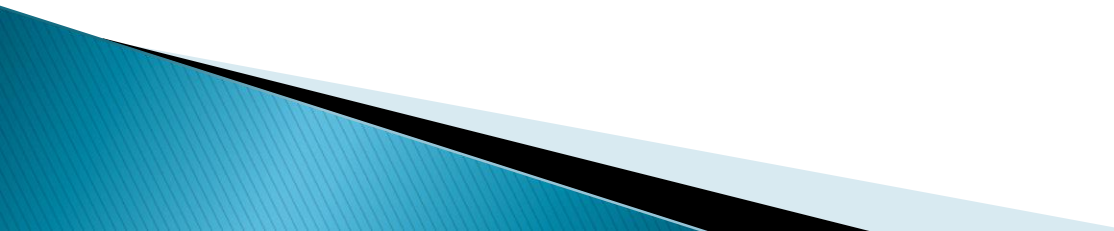
Grants Management System – GMS

- ▶ 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)

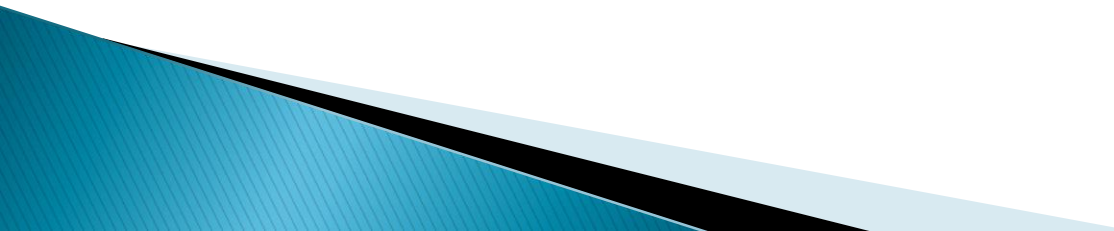
- ▶ SUNY PACS is a multi-year collaborative project to implement Huron's online "Click Portal" solution to support PIs, Students, Compliance and Research Administration staff
 - ▶ The platform follows the Research Administration process from cradle to grave, allowing us to achieve a new level of uniformity and efficiency
- 

Pre-Award and Compliance Software (PACS)

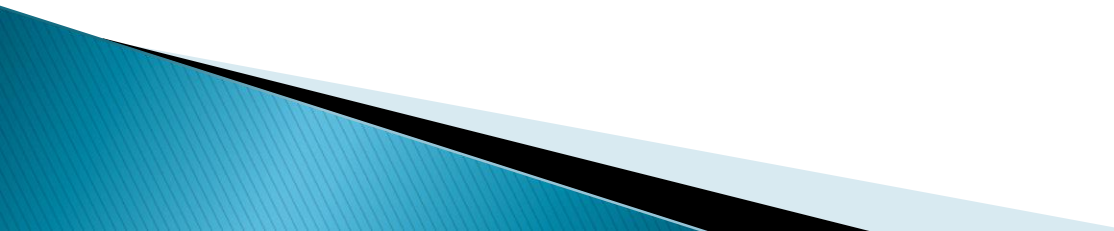
- ▶ SUNY project goals include:
 - Reducing the administrative burden on our researchers so they can devote their time to research
 - Assisting the campuses to generate a higher volume of quality, compliant, collaborative, and multi-disciplinary grant proposals
- 

Huron Online Click Portal


▶ 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
- 

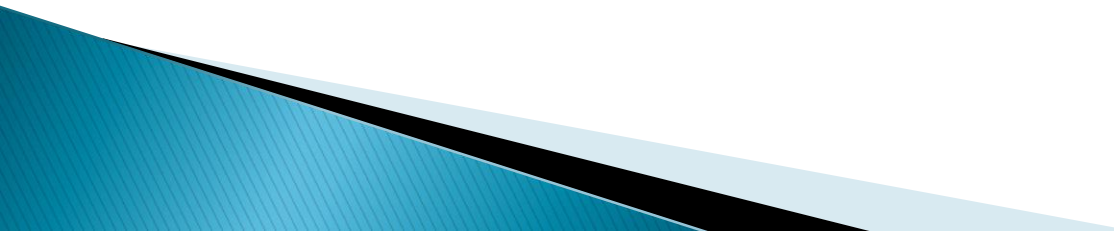
Other Advantages – Huron Click

- ▶ 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
- 

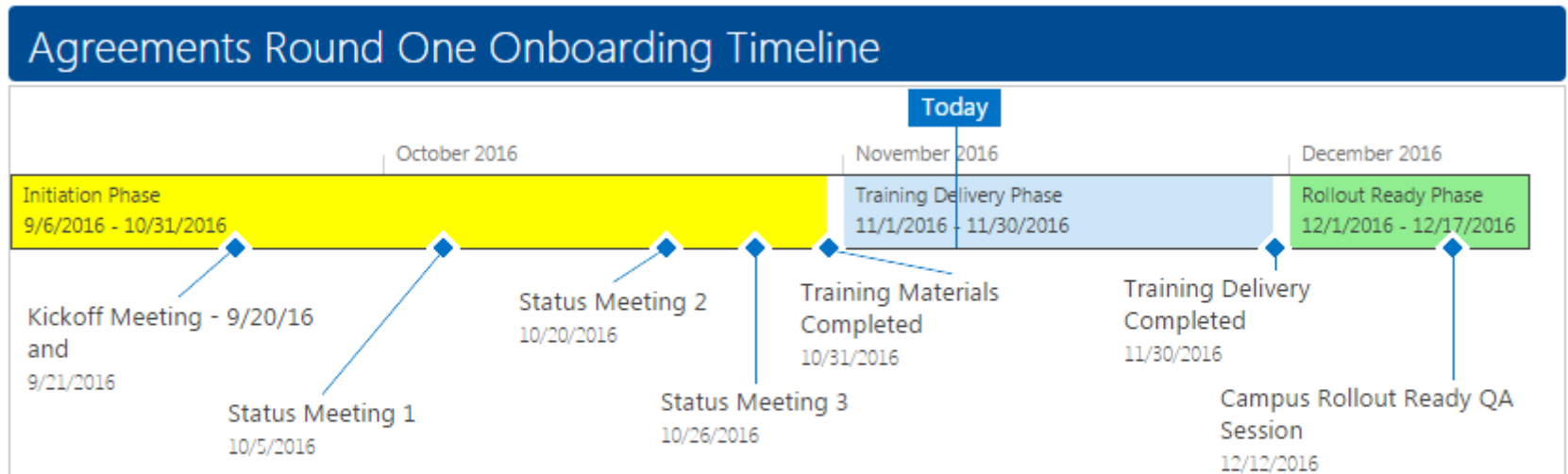
Huron Click – our GMS

- ▶ 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 –

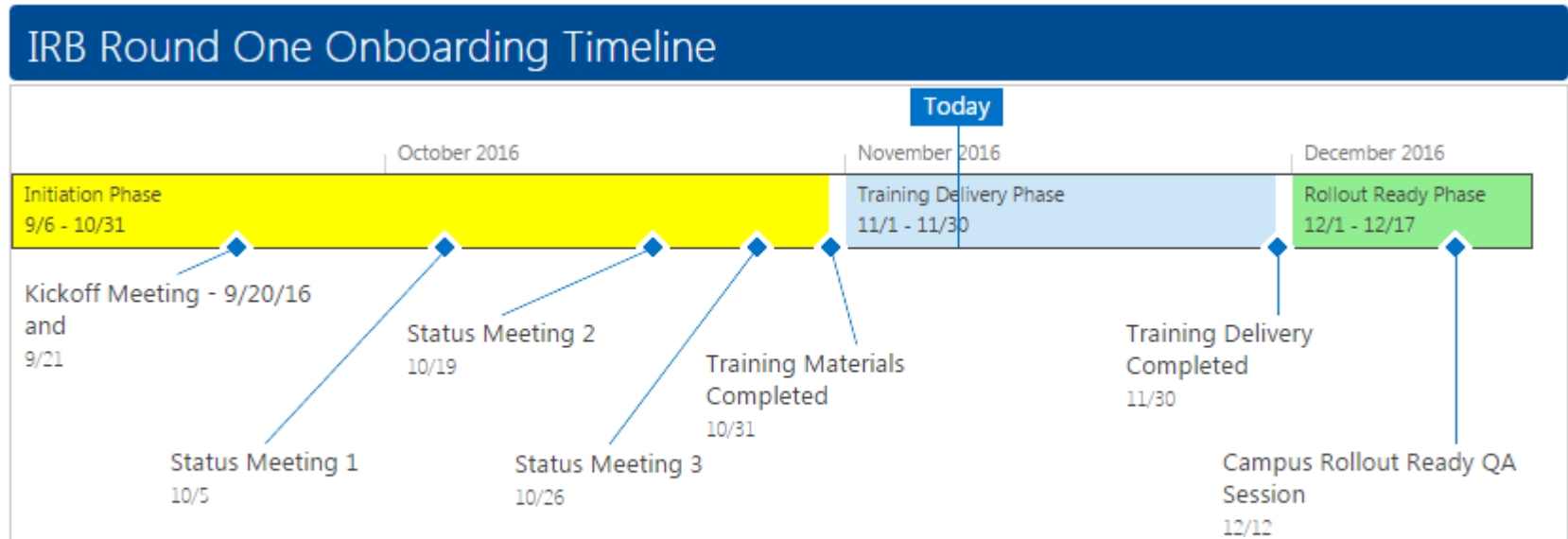
- ▶ The system integrates the following aspects of grants management into a single system using the following modules:
 - Agreements
 - IRB
 - COI
 - IACUC
 - Safety
 - Grants
- 

Agreements



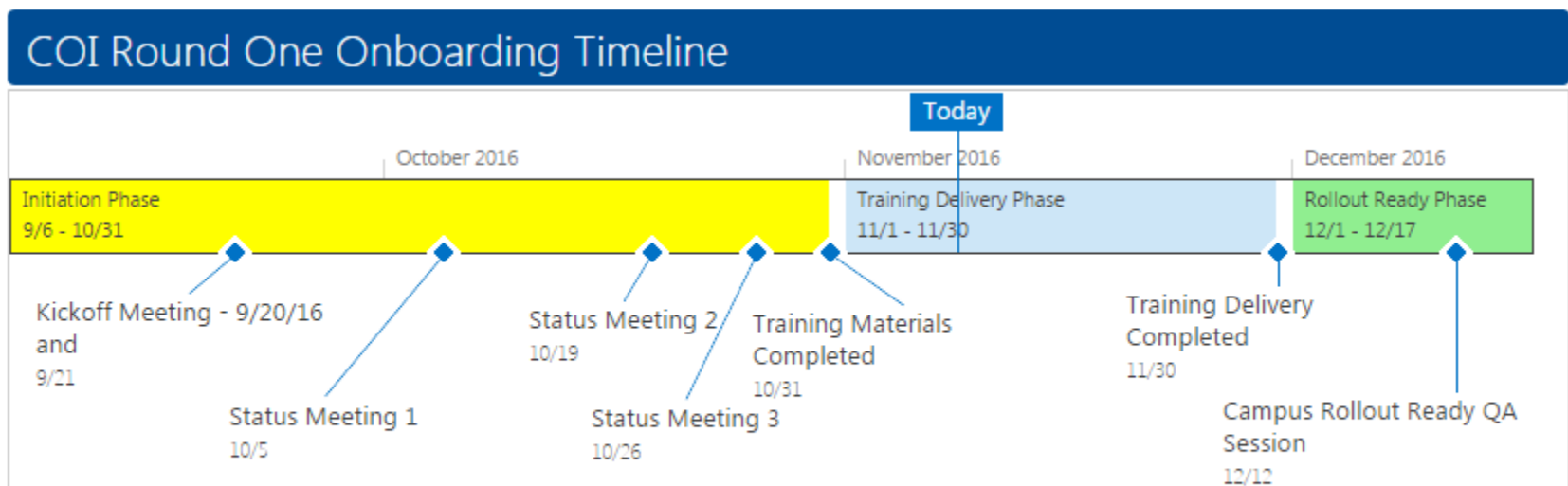
^ TIMELINE INFORMATION ^ To access information about each phase in the timeline (including a link to all documents for that phase), click on that phase bar, then click 'Open.'

IRB



^ 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.'

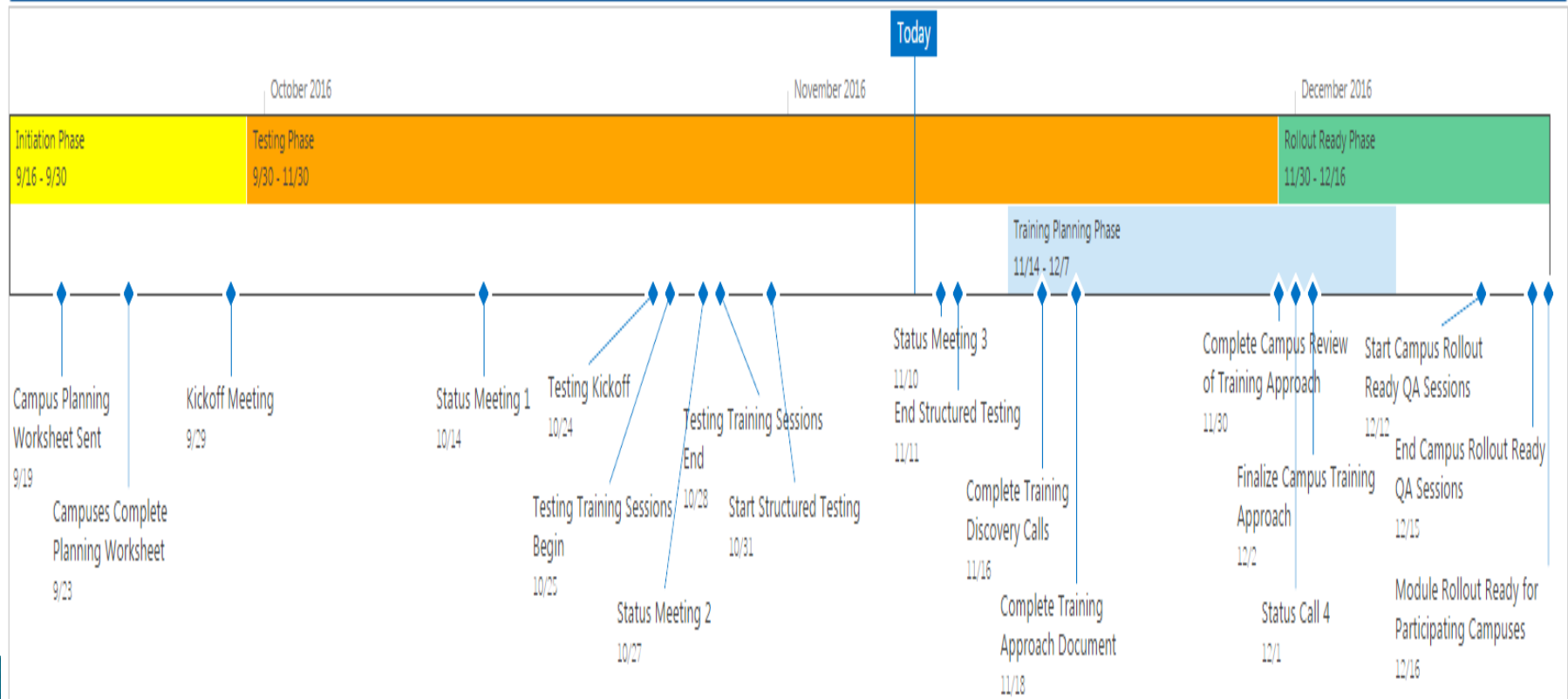
COI Onboarding Timeline



^ 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 (IBC)

Safety Adoption Timeline



PACS Campus Adoption Overview

▶ 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

PACS Campus Adoption Overview

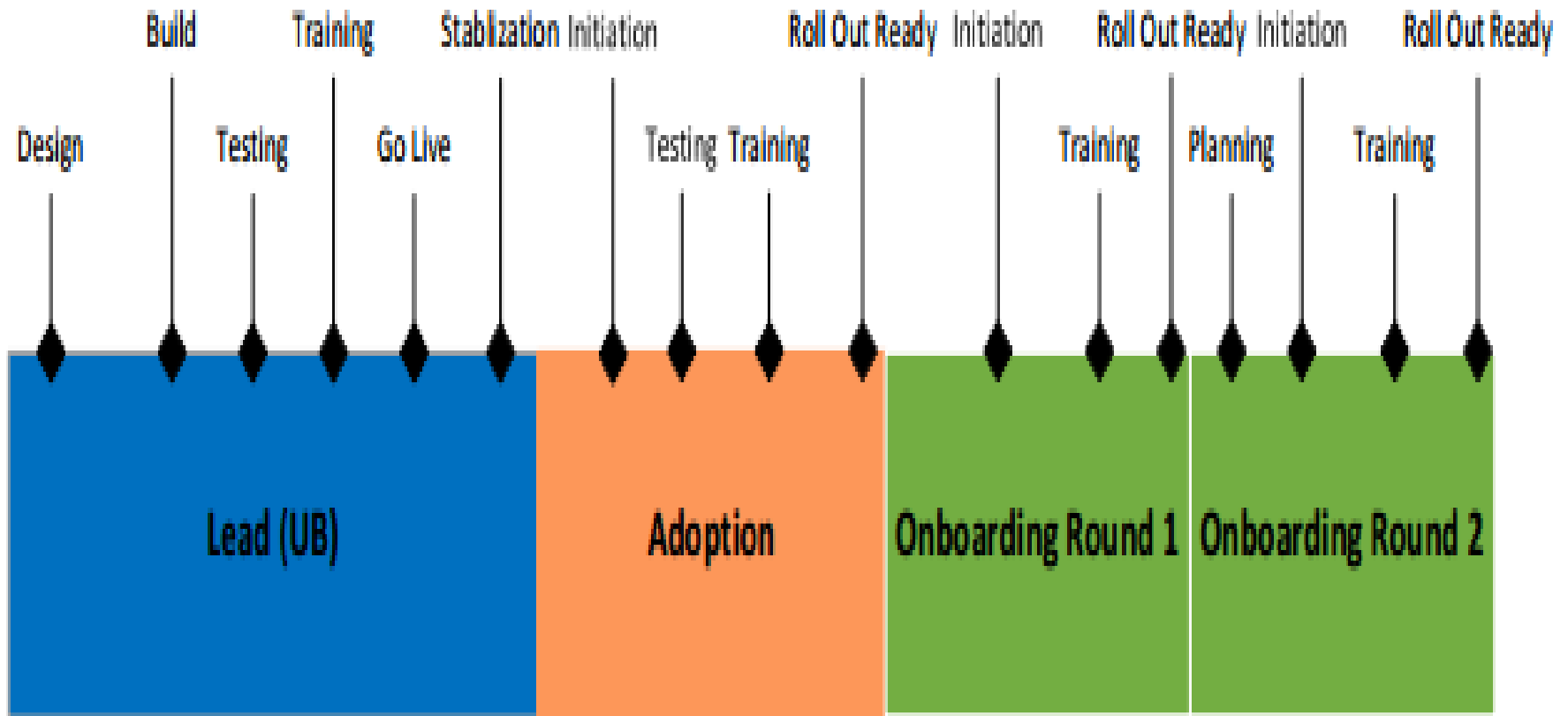
▶ Go-Live Stage

- 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

Module Lifecycle

- ▶ 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



Training

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY
31	1 9:00 am AGR 1 - Submit/Route an Agreement 2:00 pm COI 1 - Submit a Disclosure	2 9:00 am AGR 2 - Administration of Agreements (Decentralized) 2:00 pm COI 2 - Administer a Disclosure & Committee Review	3 9:00 am AGR 3 - Administration of Agreements (Centralized) 2:00 pm IRB 1 - Submit a Study	4 9:00 am IRB 2 - Administer a Study 2:00 pm IRB 3: IRB Committee Administration
7 9:00 am IRB 1: Submit a Study 2:00 pm AGR 2: Administration of Agreements (Decentralized)	8 9:00 am IRB 2: Administer a Study 2:00 pm AGR 1: Submit/Route an Agreement	9 9:00 am IRB 3: Committee Administration 2:00 pm COI 1: Submit a Disclosure	10 9:00 am AGR 3: Administration of Agreements (Centralized) 2:00 pm COI 2: Administer a Disclosure and Committee Review	11
14 9:00 am COI 1: Submit a Disclosure 2:00 pm IRB 1: Submit a Study	15 9:00 am COI 2: Administer a Disclosure and Committee Review 2:00 pm IRB 2: Administer a Study	16 9:00 am IRB 3: IRB Committee Administration 2:00 pm AGR 3: Administration of Agreements (Centralized)	17 9:00 am AGR 2: Administration of Agreements (Decentralized) 2:00 pm COI 1: Submit a Disclosure	18 9:00 am AGR 3: Administration of Agreements (Centralized) 2:00 pm COI 2: Administer a Disclosure and Committee Review
21 9:00 am AGR 1: Submit/Route an Agreement 2:00 pm IRB 1: Submit a Study	22 9:00 am - 10:00 am COI 1: Submit a Disclosure	23	24	25
28 9:00 am IRB 1: Submit a Study 2:00 pm AGR 1: Submit/Route an Agreement	29 9:00 am AGR 2: Administration of Agreements (Decentralized) 2:00 pm IRB 2: Administer a Study	30 9:00 am AGR 3: Administration of Agreements (Centralized) 2:00 pm IRB 3: IRB Committee Administration	1	2

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”
- 