Accommodation of Revised Awards discussion

## **Goal:**

## On conceptual level discuss the options for accommodation of revised awards. Selected option will affect database structure.

## **Agenda:**

* Visuals for discussion of options
* Overall business questions
* If possible => Selection of the option

**Help materials portion:**

* If option is selected and time permits => questions specific to a selected option
* If needed => More detailed description of the options; pros and cons for each options from CBIIT point of view
* If needed => Reference to existing rules (how the system works), if needed

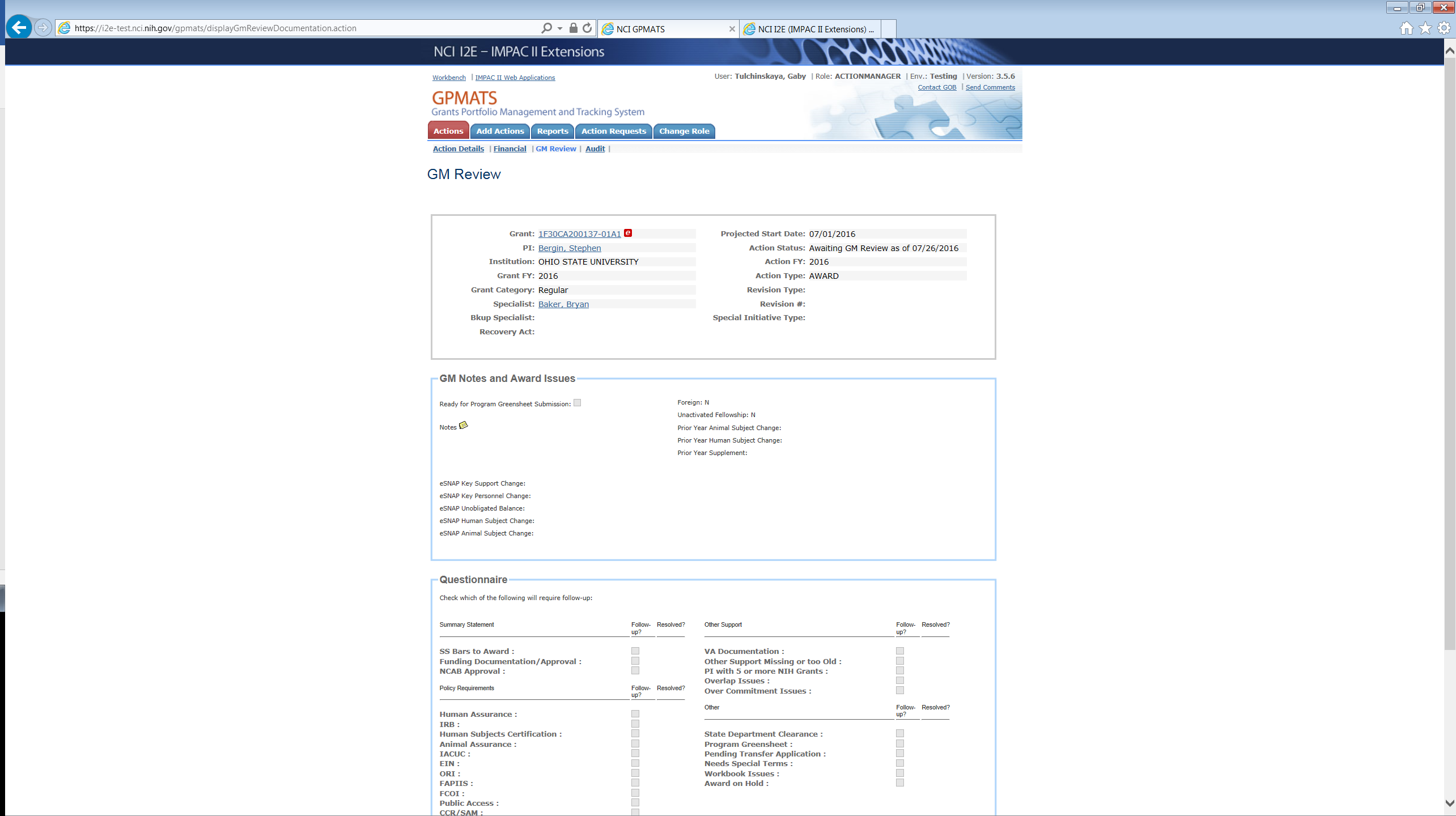
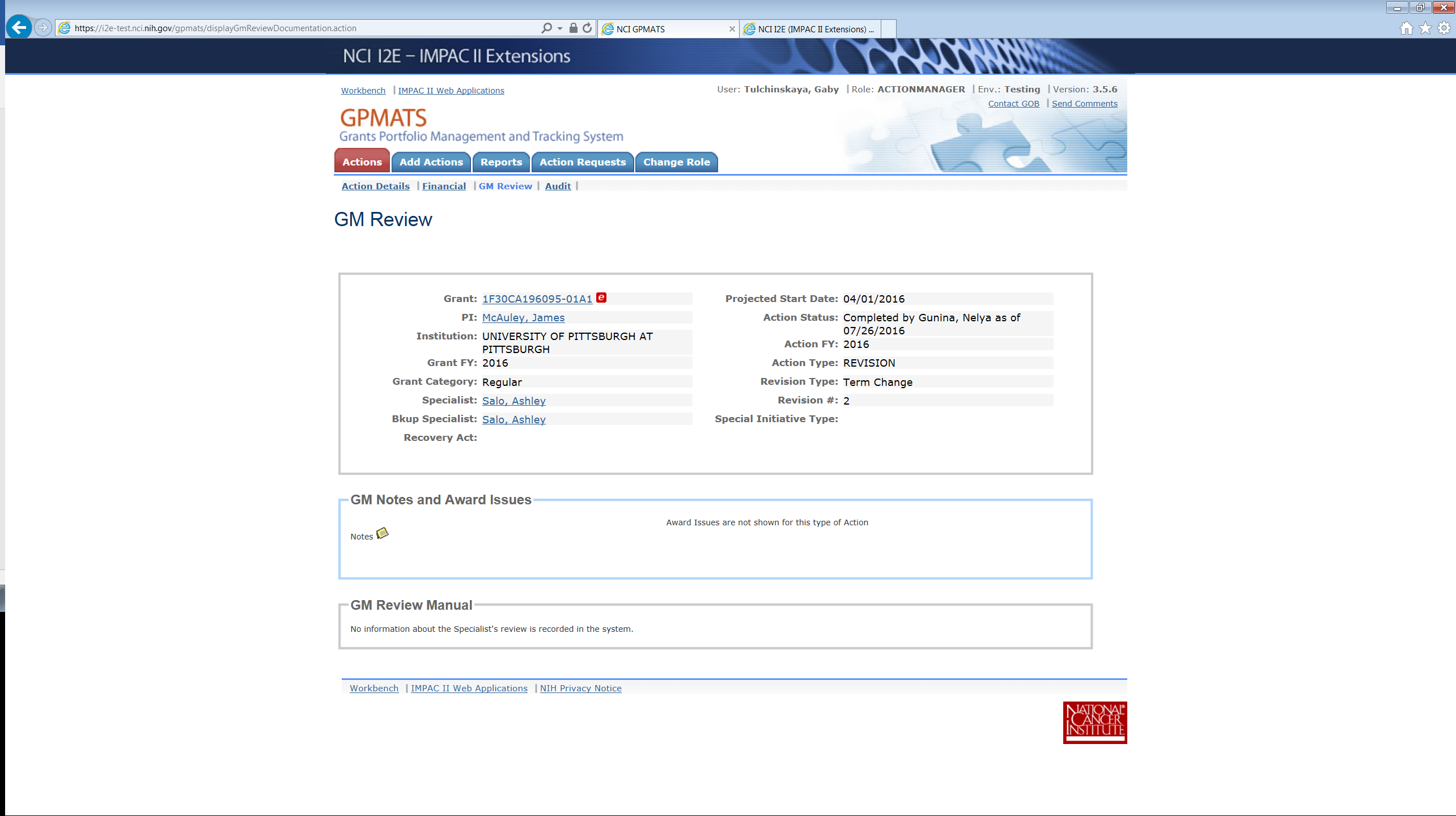
NOTE: Proposed options are based on the information that:

* Grant can have only 1 AWARD action (not in Closed status)
* Grant can have multiple REVISION actions
* The same set of question (questionnaire) will be used for ALL revision actions for ALL type/mechanisms
* Only GMS have revision questionnaire

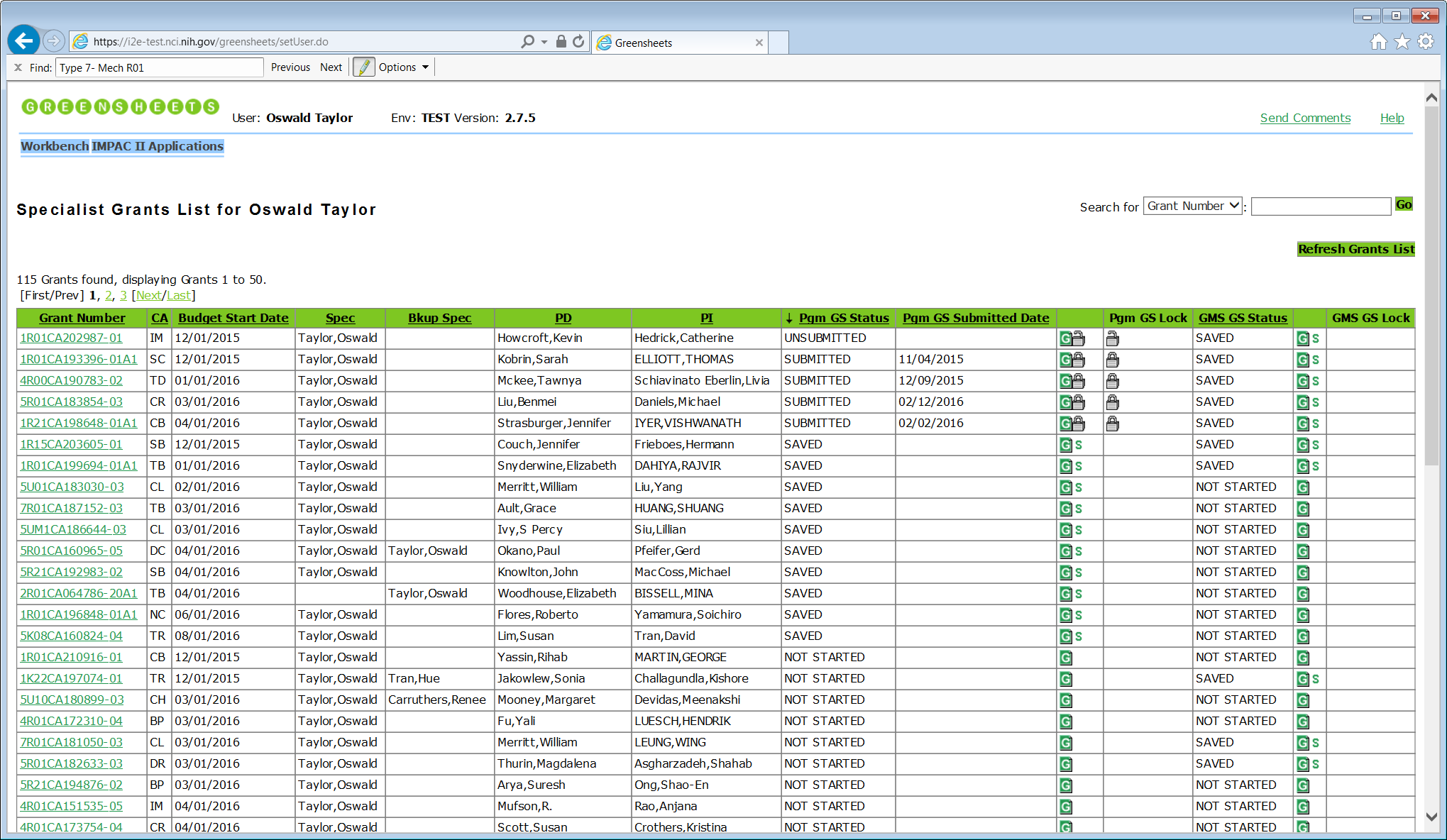
Please confirm.

## Visuals for discussion

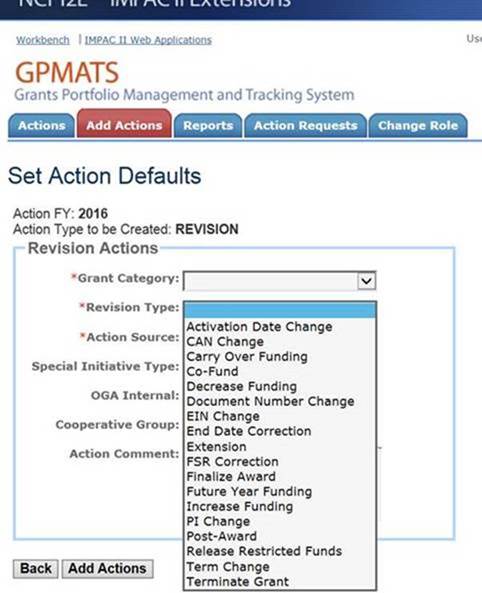
**Option 1: Add revision checklist in GPMATS (similar as Triage Questionnaire)**



**Option 2: Allow additional GMS greensheet(s) in GreenSheets for revision; different form type will be used for AWARD and REVISION actions**



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| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Grant Number** | **CA** | **Budget Start Date** | **Spec** | **Bkup Spec** | **PD** | **PI** | **GPMATS Action Type** | **OGA Award Release date** | **Pgm GS Status** | **Pgm GS Submitted date** |  | **Pgm GS Lock** | **GMS GS Status** |  | **GMS GS Lock** |
| 1R01CA202987-01 | IM | 12/01/2016 | Taylor, Oswald | Clark, Patty | Liu, Grace | Tran, David | Award | 5/29/2015 | FROZEN | 11/04/2016 |  |  | FROZEN |  |  |
| Revision/ Term change | 2/03/2016 |  |  |  |  | FROZEN |  |  |
| Revision/ Co-fund |  |  |  |  |  | SAVED |  |  |
| 5R01CA123456-04 | CE | 12/01/2016 | Clark, Patty | Perry, Carol | Hubbard, Leah | Wu, Tzyy | Award |  | SUBMITTED | 11/04/2016 |  |  | SAVED |  |  |
| 5R01CA077476-03A1 | CB | 12/01/2016 | Clark, Patty |  | Hubbard, Leah | Woo, Tong | Award | 2/03/2016 | FROZEN | 11/04/2016 |  |  | FROZEN |  |  |
| Revision/ Co-fund |  |  |  |  |  | SAVED |  |  |



### **Questions:**

### **Overall (applicable to both options)**

* How often do you expect changing revision questionnaire?
* Do you need attachments, comments and conditional questions for revision questionnaire?
* Do you need to change revision questionnaire via GPMATS change request or have a full control via FormBuilder?
* Should revision questionnaire be used for ad-hoc reporting?
* Do you need versioning for revision questionnaire?
* If revision questionnaire will be in GPMATS is there a need for submission? If submission is needed, do you need validations in GPMATS that revision questionnaire is submitted before revisions action is completed?
* What is a triggering event when the questionnaire for the revision should be displayed (as soon as Revision action is created or should we wait for a certain status or any other event)?
* Can revision action exist without AWARD action?

### **Additional questions for option 1:**

### Subashini will ask

### **Additional questions for option 2:**

* How should we indicate revised awards for the same grants on the screen (display revision type or any other field)?
* Should greensheets record display any additional information about revision action (e.g. OGA award release date)?
* Should PD screen indicate existence of revisions? Currently PD sees specialist greensheet status, but don’t have ability to view actual greensheet
* What is a triggering event when the greensheet for the next revision action should be frozen (“Closed” status on this revision action)?
* Can several revision greensheets for the same grant be editable at the same time? Or do we have to have prior greensheet frozen before the user can work with the next revision greensheet?

## **Description of the options; pros and cons**

|  |  |  |  |
| --- | --- | --- | --- |
| **#** | **Options** | **Pros** | **Cons** |
| 1 | **Add revision questionnaire in GPMATS (similar as Triage Questionnaire).**   * Questionnaire will be hardcoded for revision * Some revisions don’t need a questionnaire, will have to implement a logic how to determine such revisions * When GPMATS system will determine that submission of revision a questionnaire is needed, the system will display a questionnaire on GM Review page * Currently, there is no concept of submission of the questionnaire in GPMATS. As a result, it is editable until Revision action is in Closed status. Do we need any changes? * Should GPMATS be modified to add validation on completion/submission of the revision questionnaire before completing Revision action? * Currently, when questions are added/deleted from AWARD questionnaire, the new questionnaire is displayed only for newly created actions. Should it be changed? | * Simplicity for a user * Doesn’t affect FormBuilder and GreenSheets system * No need to navigate to GreenSheets | * Questionnaire is hardcoded, there is no process of creation/review/deploying new questionnaire. * Lack of visual, “at a glance” representation of all questionnaires for a grant * Inconsistent business flow (for AWARD actions user have to go to GreenSheets and for REVISION stay in GPMATS) * If any of the changes in the blue are needed – extra work |
| 2 | **Allow additional revision type GMS greensheet(s) in GreenSheets; different form type will be used for AWARD and REVISION action**:   * Users will create revision template (revision form) in FormBuilder and promote it to Greensheets * Greensheets system will allow grants with revision action to be visible. If the system finds revision action the **revision type** of greensheet will be displayed. * Some revisions don’t need a questionnaire, will have to implement a logic how to determine such revisions * Direct link from GPMATS to Greensheets will be provided. It will help with easy completion/submission of revision greensheets * Should GPMATS be modified to add validation on completion/submission of the revision questionnaire before completing Revision action? | * Re-use of functionality for creation and managing a form in Form/Builder * Re-use of form versioning * Re-use of existing logic/statuses for completion and submission of greensheets * Consistent workflow * Visual, “at a glance” representation of all questionnaires for a grant | * Additional modifications to FormBuilder to allow the user create and deploy different types of forms (for AWARD and for REVISION). * Additional modifications to GreenSheets (to allow grants with revision to be visible) |

## Existing rules (how the system works currently)



If grant is NOT in GPMATS (no actions at all):

* Specialist view => grant is not displayed in GreenSheets specialist view
* Program view => grant is displayed in GreenSheets program view, greensheet can be saved, but not submitted

If grant is in GPMATS, the system checks if it has REVISION action.

* Grants with REVISION action are NOT displayed in Greensheets system at all.
* Grants with AWARD action are displayed in both GMS and PD views, unless status of AWARD action is Cancelled. PD can SUBMIT greensheet with AWARD action.

NOTE: there are some additional rules when grant is not displayed in GreenSheets, but they are not relative for the purpose of this discussion.

