Referral Activity

The Referral Activity application provides a central point for the NCI Extramural Program staff to respond to grant application referrals from the Division of Extramural Activity's Program Coordination and Referral Branch.

Security

Only NCI Extramural staff with at least one of the following roles will have access to the application:

- Grants Technical Assistant
- Program Analyst
- Program Director
- Program Administrator
- Program Assistant
- Program Officer
- Program Specialist

The application will show all referrals for NCI Programs. Users can **only** take action on grant referrals if it is in one of the user's designated Cancer Activities.

The user's designated Cancer Activities (termed My Cancer Activities) is based on:

- Any Cancer Activities assigned to the person who has a role of Program Director
- Any Cancer Activities the user is assigned to monitor

For all questions about security, roles and My Cancer Activities, please contact your NCI Enterprise Maintenance Representative. The representative maintains the roles and assigned Cancer Activities.

Access

The application is available from the NCI Extramural Workbench. There are three routes to access Workbench:

- 1. Desktop Icon Some users may have a desktop icon titled Extramural Workbench. Double-clicking on the desktop icon will open Workbench.
- 2. Start Menu Choose Extramural Workbench from Start Menu → Core Service Applications → Administration Apps.

3. Mozilla – Open the Mozilla web browser and navigate to https://i2e.nci.nih.gov. Choose the Workbench for Extramural Program link under Enterprise Applications.

At the Workbench page, there are multiple entry points for the application.

- 1. Choose 'Referral Activity' from the Web Applications list located in the Information box under Links. Press 'GO' to open Referral Activity.
- 2. If the 'Outstanding Referrals' box is present, you can click on the words 'Outstanding Referrals' or the 'OPEN' button.
- 3. Choose any link in the 'Outstanding Referrals' box.

Workbench Outstanding Referrals

To be added...

Page Design

Header



User: Delloso, James (Jim) Env: Development Version: 0.95 Dev Send Comments Help

The header of each page contains:

- Application Logo Referral Activity
- User's Name
- Environment Production
- Version
- Send Comments link To provide comments or request help, choose this link.
- Help link Opens the help documentation
- Workbench link
- IMPAC II Applications link

Footer

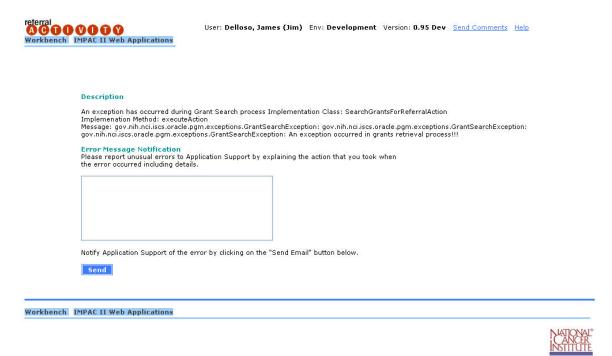
Workbench IMPAC II Web Applications



The footer of each page contains:

- Workbench link
- IMPAC II Applications link
- NCI Logo

Errors

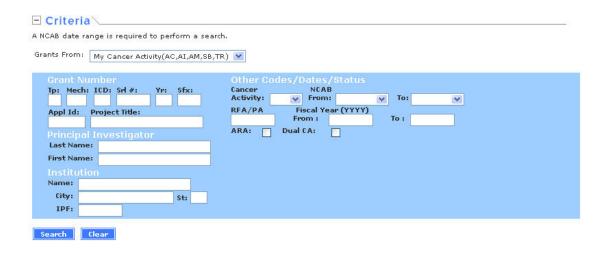


An error is an unexpected problem that occurs during the use of the application. When an error is encounted, an error page will appear. In the text box provided, please explain the action you were attempting when the error happened.

Referral Activity Query

The application's main page is Referral Activity Query. By design, this page is similar to the main pages of other Workbench applications such as Your Grants, Notifications and Program Funding Requests. You should already be familiar with how it works.

Criteria



The Criteria section provides fields to narrow your search of referrals. An NCAB date range is required. This requirement prevents users from accidentally creating a time-consuming search.

General Search Guidelines

- A NCAB date range is the ONLY required search criteria
- All searches are case-insensitive. 'r01' is the same as 'R01.'
- The search will ALWAYS include a wildcard at the end of the field. Example: Entering 'R' in the mechanism field will find any mechanism that begins with 'R' (R01s, R13s, etc.)
- To search for a word within a field, place a '%' in front of the word. Example: Entering '%California' in the institution field will find any institution that contains the word 'California' (University of California and California Biomedical Institute, etc.)
- The criteria section can be hidden and re-displayed by clicking on the plus/minus box located to the left of the Criteria section.

+ Criteria

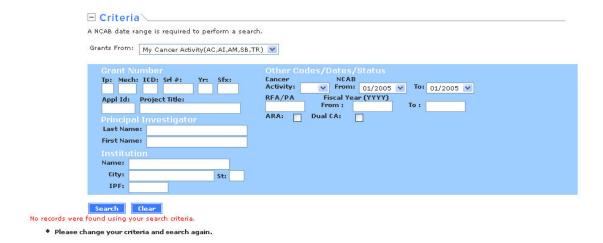
Criteria Fields

Screen Title	Definition
Grants From	The core set of grants to be searched.
	All Grants: All NCI and NCI-interested grants
	ready for a referral response
	My Cancer Activities: All NCI and NCI-interested
	grants in my Cancer Activities ready for a referral
	response
Тр	The type of grant: usually 1, 2 or 3
Mech	The grant's mechanism also known as activity code:
	R01, T32, etc.
ICD	The two character code for the primary Institute:
	CA for NCI, HL for Heart and Lung, etc.
Srl #	The serial number
Yr	The support year
Sfx	The grant's suffix (used for amendments): A1, A2,
	etc.
Appl Id	The system unique identifier for an grant
Project Title	The title of the project
Principal Investigator Last Name	The last name of the Principal Investigator
Principal Investigator First Name	The first name of the Principal Investigator
Institution Name	The name of the institution
Institution City	The city in which the institution is located
Institution State	The state in which the institution is located
Institution IPF	The profile number of the institution as defined by
	NIH
Cancer Activity	The NCI code for the program to which the grant
	has been referred
NCAB From/To	The month and year of the board meeting
	(MM/YYYY)
RFA/PA	The notice through which the grant was submitted
Fiscal Year (YYYY) From/To	The fiscal year in which the grant is expected to
	start activities
ARA	Is the grant a result of an ARA (Awaiting Receipt of
	Application)?
Dual CA	The other NCI Cancer Activity to which the grant
	has been referred

To start your search, press the 'Search' button located below the Criteria fields. To clear all criteria fields, press the 'Clear' button.

No Results found

If the search criterion does not return any grants, please check your criteria and try again.



Grants



The Grants section lists all of the outstanding grant referrals based on your criteria. From here, you will start the referral response process.

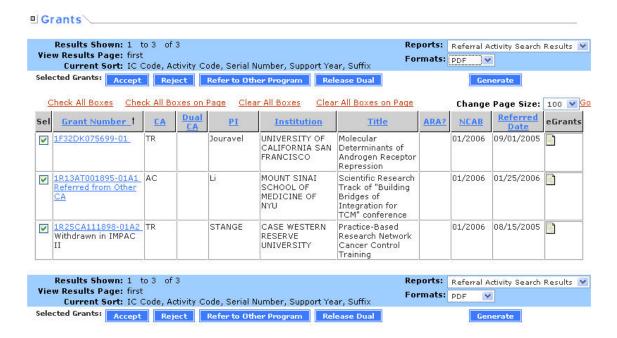
Header/Footer Design

The header and footer of the grants section provides information about the results of your search and option to run reports and respond to referrals

Screen Title	Definition
Results Shown	Display a count of the total number of results
	retrieved as well as the number currently displayed
View Results Page	Provides navigation links to the First, Previous,
	Next and Last pages of the results retrieved
Current Sort	Display how the list is ordered. By default, the list
	is ordered by IC Code (CA, HL, etc.), Activity Code
	(Mechanism), Serial Number, Support Year and
	Suffix.

Report	Lists the available reports
Format	Lists the formats available for a chosen report
Selected Grants	Displays the buttons to take a designated action against the selected referred grant(s): Accept, Reject, Refer to Other Program, Release Dual, Generate (run report)
Check All Boxes	Selects all of the grants retrieved. The next step would be to choose an action against the selected grants.
Check All Boxes on Page	Selects all of the grants displayed on the page. The next step would be to choose an action against the selected grants.
Clear All Boxes	Removes selection of all grants retrieved
Clear All Boxes on Page	Removes selection of all grants displayed on the page
Change Page Size	Change the number of grants displayed on the page. Press Go to make the change.

Grants List



The Grants list contains the basic information about the grant and its referral.

Screen Title	Definition
Sel	The Select box used to take an action against the
	grant.
Grant Number	The grant number. To access the 'Everything You
	Ever Wanted To Know About' page, click on the
	grant number.
	This section may contain additional information as
	explained below.
CA	The NCI Cancer Activity to which the grant has

	been referred.
Dual CA	The other NCI Cancer Activity to which the grant
	has been referred (Dual Referral). To view the Dual
	CA's Point of Contact, place you cursor on the Dual
	CA. The Point of Contact name will be displayed.
PI	The last name of the Principal Investigator
Institution The name of the institution	
Title The title of the project	
ARA?	Is the grant a result of an ARA (Awaiting Receipt of
	Application)?
NCAB	The board date
Date Referred	The date on which the grant was referred to the
	Cancer Activity
eGrants	A link to the NCI eGrants file for the grant

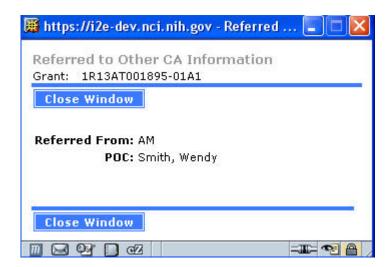
If the grant has been officially withdrawn in IMPAC II, the Grant Number box will state 'Withdrawn in IMPAC II.'

				or prosteasome minu			
TR01CA123314-01 Withdrawn in IMPAC II	AC	JIANG	WEST VIRGINIA UNIVERSITY	VEGF-PI3K Crosstalk in Ovarian Tumorigenesis by Endothelial Cells	05/2006	01/10/2006	

If the grant has been referred from another NCI Cancer Activity, the Grant Number box will contain a link titled 'Referred from Other CA.'

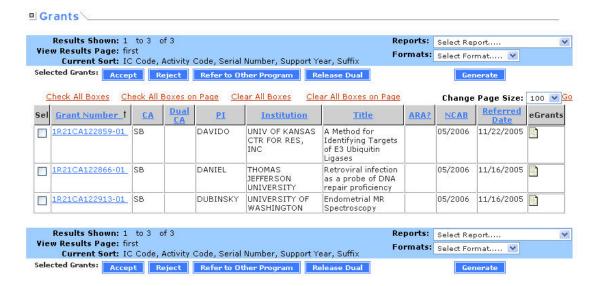


To view information about the re-referral, click on the link.

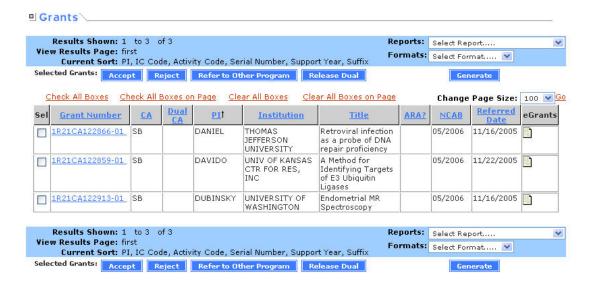


Sorting

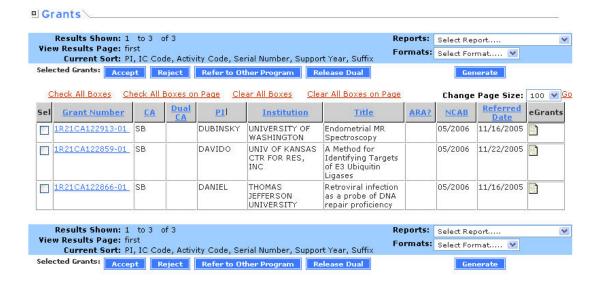
Many of the columns in the results list can be sorted. By default, the list is ordered by IC Code (CA, HL, etc.), Activity Code (Mechanism), Serial Number, Support Year and Suffix.



To sort, click on the hyperlinked column title that you wish to sort on.



To reverse the sort, click on the hyperlinked column title again.



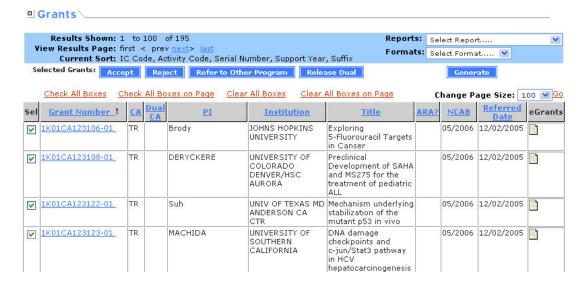
Note: *Only one column can be sorted*. The secondary sort is by IC Code (CA, HL, etc.), Activity Code (Mechanism), Serial Number, Support Year and Suffix.

Remember, you can always add additional criteria and search again to reduce the Grants list.

Generating Reports

To generate a report, take the following steps:

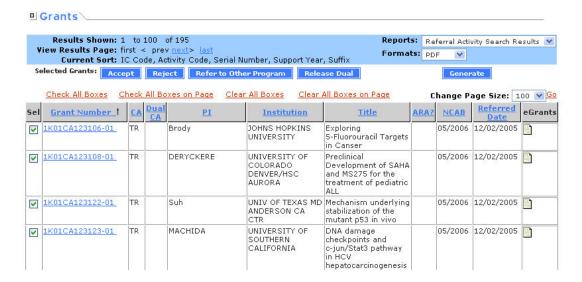
1. Select any grants you wish to include in the report



2. Choose a Report from the Report list

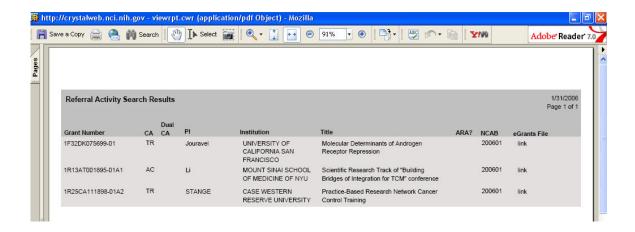


3. Choose a Format from the Format list



4. Press Generate.

The report will open in a new browser window.



Search Results Report

The main report is the Referral Activity Search Results report. As shown above, this report contains the same columns that appear on the screen. It also includes a link to open eGrants. The link is available by clicking on the word link in the report. The links is available on all formats (Report, Excel and PDF).

Responding to Referrals

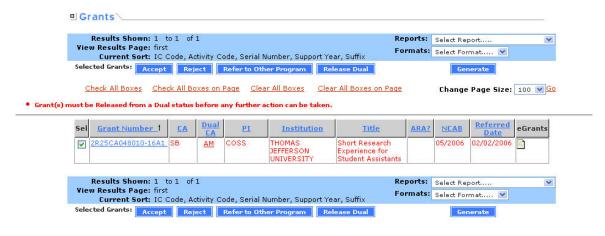
Take the following actions to start the referral response process:

- Determine what action you are going to take (Accept, Reject, Refer to Other Program or Release Dual).
- Select the Grants that you wish to take action against.
- Press the chosen action (Accept, Reject, Refer to Other Program or Release Dual).

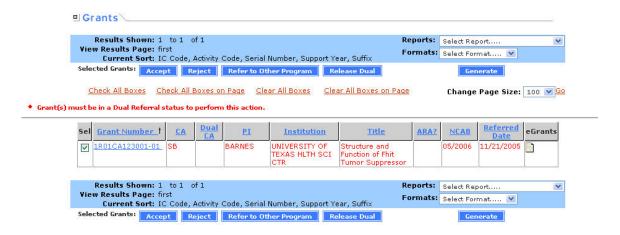
If the chosen action is applicable to all of the selected grants, you will be taken to a new page.

An error message may be display under the following conditions:

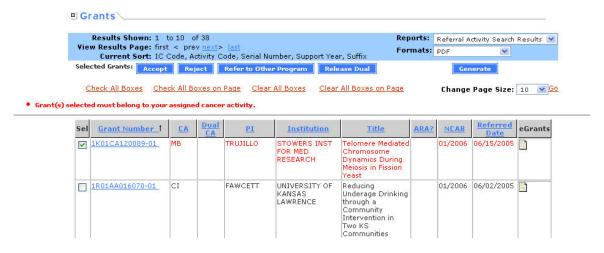
• Trying to Accept, Reject or Refer to Other Program a grant with a Dual referral. The application will only allow the releasing of dual referrals. One Cancer Activity must release the grant first before any additional actions can be taken.



• Trying to Release a grant without a Dual referral.



• Trying to take action on a referral that is not part of My Cancer Activities.



All Referral Response pages have a button titled 'Referral Activity Query.' This button takes you back to the query page and refreshes the Grant list.

The Referral Acceptance page is where the referral is officially accepted and the grant is assigned a NCI Program Director.

The grant(s) selected on the Referral Activity Query page will be available on this page.

You can return to the Query page at any time by pressing the Referral Activity Query button.

Multiple Grant Assignment

The Referral Activity application can significantly shorten the time needed to accept multiple referrals. You can assign a Program Director to multiple grants at the same time. This is possible even when you are working with more than one Cancer Activity.

Multiple Assignments with one Cancer Activity

To assign a Program Director to more than one grant at a time, take the following steps:

1. Choose the Program Director from the Assign To list.

Referral Acceptance



2. Select the box for each grant to be assigned



3. Press the 'Apply to Selected Grants' button. The Program Director will be loaded into the Assign To column for all selected grants.

Referral Acceptance



4. Press Accept.

Referral Acceptance Results



Return to Referral Activity

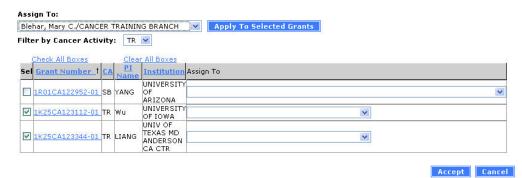
You can repeat these steps for each Program Director that is being assigned grants in the list.

Multiple Assignments with more than one Cancer Activity

To assign a Program Director to more than one grant at a time, take the following steps:

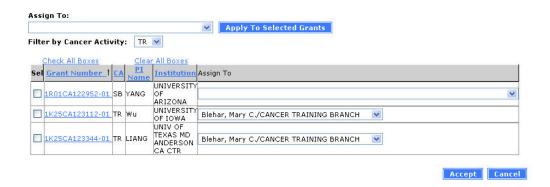
- 1. Choose the Cancer Activity from the 'Filter by Cancer Activity' list. This selection will filter the list of Program Directors in the Assign To list based on Cancer Activity.
- 2. Choose the Program Director from the Assign To list.

- 3. The page will automatically select all of the grants in the Cancer Activity that is being filtered.
- 4. Select the box for each grant to be assigned. Note: If you choose a grant with a different Cancer Activity, the Program Director will NOT be assigned because the assignment would be invalid.



5. Press the 'Apply to Selected Grants' button

Referral Acceptance



You can repeat these steps for each Cancer Activity and Program Director that is being assigned grants in the list.

6. Press 'Accept.'

Individual Assignment

You can manually override an assignment or assign a Program Director to a grant by choosing the Program Director from the Assign To list located in the grant's row.

Take the following actions:

1. Choose the Program Director from the list in the Assign To box.



2. Press Accept.

Referral Acceptance Results

Grant Number	CA	PI Name	Institution	PD Name/Org	Acceptance Results
1R13AT001895-01A1	AC	Li	MOUNT SINAI SCHOOL OF MEDICINE OF NYU	Bhatia, Kishor	SUCCESS
	- 12		OF PIEDICINE OF NEO		

Grants

The Grants section contains the basic information about the grant. A list is provided to select the Program Director for the grant.

Screen Title	Definition
Sel	The Select box used to take an action against the
	grant.
Grant Number	The grant number. To access the 'Everything You
	Ever Wanted To Know About' page, click on the
	grant number.
PI	The last name of the Principal Investigator
Institution	The name of the institution
Assign To	Contains a list of eligible Program Directors for the
	Cancer Activity. The chosen Program Director will
	be assigned to the grant when the 'Accept' button is
	clicked.

Sorting

Many of the columns in the acceptance list can be sorted. To sort, click on the hyperlinked column title that you wish to sort on. To reverse the sort, click on the hyperlinked column title again. Only one column can be sorted at any one time.

Accepting the Referral

Press the Accept button below the Grants list to accept the grant(s). The acceptance will be processed for any grant that has a PD in the Assign To list. Grants without a PD in the Assign To list will be skipped.

To leave the page without process the referrals, press the 'Cancel' button. The application will return to the Referral Activity Query page.

Referral Acceptance Results

The Referral Acceptance Results page provides processing feedback on the referrals that have been accepted.

Referral Acceptance Results

Grant Number	CA	PI Name	Institution	PD Name/Org	Acceptance Results
1R25CA111898-01A2	TR	STANGE	CASE WESTERN RESERVE UNIVERSITY	Gorelic, Lester S.	SUCCESS
1F32DK075699-01	TR	Jouravel	UNIVERSITY OF CALIFORNIA SAN FRANCISCO	Gorelic, Lester S.	SUCCESS

Return to Referral Activity

Grants List

The list contains each processed grant and the results of the processing.

Screen Title	Definition		
Grant Number	The grant number. To access the 'Everything You		
	Ever Wanted To Know About' page, click on the		
	grant number.		
CA	The Cancer Activity assigned to the grant		
PI	The last name of the Principal Investigator		
Institution The name of the institution			
PD Name	The name of the Program Director assigned to the		
	grant (only provided on successful processing)		
Acceptance Results	The results of the Acceptance: SUCCESS or		
	FAILURE		

If the Acceptance Results is SUCCESS, then the referral has been accepted and a Program Director has been assigned.

If the Acceptance Results is FAILURE, then no action has been taken. The reason for the failure is provided. Please use the comments links if you have any questions about the failure.

You can return to the Referral Activity Query page by pressing 'Return to Referral Activity.' The Query page should be updated and any grants that have been successfully accepted will no longer appear.

The Referral Rejection page is where the Cancer Activity officially rejects the referral.

The grants selected on the Referral Activity Query page will be available on this page.

You can return to the Query page at any time by pressing the Referral Activity Query button.

Rejection Comments

Standard rejection comments have been created to simply the rejection process. In a majority of rejections, a standard comment will suffice. To provide your own comments, choose Other from the Comments list and type your comments in the Other Comments text area. Up to 2000 characters are available for Other Comments.

Multiple Grant Rejections

The Referral Activity application can significantly shorten the time needed to reject multiple referrals. You can provide the same rejection comment to multiple grants at the same time. This is possible even when you are working with more than one Cancer Activity.

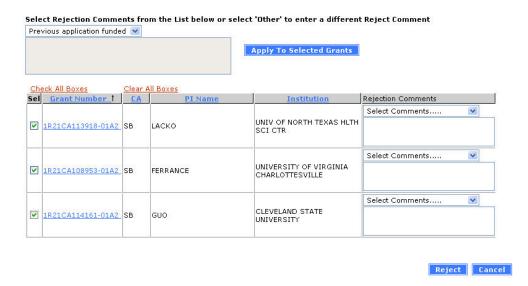
To assign Rejection Comments to more than one grant at a time, take the following steps:

1. Choose the Rejection Comment from the list. If the Comment is Other, provide comments in the Comment text area.



2. Select the box for each grant to be assigned the comments.

Referral Rejection



3. Press the 'Apply to Selected Grants' button. The Rejection Comments will be loaded into each selected grant.



4. Press Reject.

Referral Rejection Results



Return to Referral Activity

Reject Cancel

You can repeat these steps for each Rejection Comment that is being assigned to grants in the list.

Individual Grant Rejection

You can manually override a Rejection Comment or provide a Rejection Comment directly to a grant by completing the Rejection Comments area located in the grant's row.



Grants

The Grants section contains the basic information about the grant. An area is provided for comments about the referral rejection.

Screen Title	Definition
Sel	The Select box used to take an action against the
	grant.
Grant Number	The grant number. To access the 'Everything You
	Ever Wanted To Know About' page, click on the
	grant number.
PI	The last name of the Principal Investigator
Institution	The name of the institution
Rejection Comments	Contains a list of standard Rejection Comments. If
	Other is chosen, the Other Comments text area must
	be filled in.

Sorting

Many of the columns in the Grants list can be sorted. To sort, click on the hyperlinked column title that you wish to sort on. To reverse the sort, click on the hyperlinked column title again.

Rejecting the Referral

Press the Reject button below the Grants list to reject the grant(s). The rejection will be processed for any grant that has Rejection Comments provided. Grants without a Rejection Comment will be skipped.

To leave the page without processing the referrals, press the 'Cancel' button. The application will return to the Referral Activity Query page.

Referral Rejection Results

The Referral Rejection Results page provides processing feedback on the referrals that have been rejected.

Referral Rejection Results

Grant Number	CA	PI Name	Institution	Rejection Results	
1K01CA109567-01A2	AC	Savellano	DARTMOUTH COLLEGE	SUCCESS	
1R21AI071255-01	SB	DASH	CREIGHTON UNIVERSITY	SUCCESS	
1R01CA117888-01A1	SB	WALTERS	UNIVERSITY OF MINNESOTA TWIN CITIES	SUCCESS	

Return to Referral Activity

Results List

The list contains each processed grant and the results of the processing.

Screen Title	Definition
Grant Number	The grant number. To access the 'Everything You
	Ever Wanted To Know About' page, click on the
	grant number.
CA	The Cancer Activity assigned to the grant
PI	The last name of the Principal Investigator
Institution	The name of the institution
Rejection Results	The results of the Acceptance: SUCCESS or
	FAILURE

If the Rejection Results is SUCCESS, then the referral has been rejected.

If the Rejection Results is FAILURE, then no action has been taken. The reason for the failure is provided.

You can return to the Referral Activity Query page by pressing 'Return to Referral Activity.' The Query page should be updated and any grants that have been successfully rejected will no longer appear.

Referral Refer to Other Program

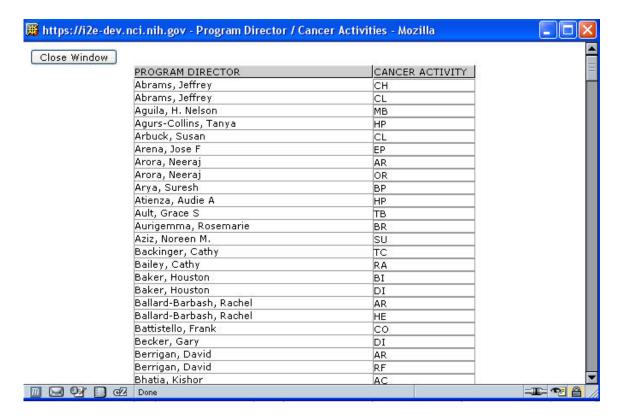
The Referral Refer to Other Program page is where the NCI Extramural Program staff in one Program (Cancer Activity) *re-refer* an existing referral to another NCI Program (Cancer Activity).

The grant(s) selected on the Referral Activity Query page will be available on this page.

You can return to the Query page at any time by pressing the Referral Activity Query button.

Program Directors By Cancer Activity

If you know the Program Director to whom you wish to re-refer the grant but are unaware of the Cancer Activity, a list is available. Press the 'View PD for CA' button below the Grants to view the list.



Multiple Referrals to Other Programs

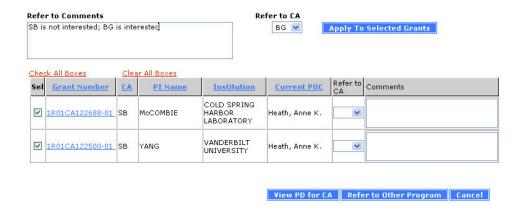
The Referral Activity application can significantly shorten the time needed to refer grants to other Cancer Activities. You can assign a new Cancer Activity to multiple grants and

provide comments (optional) at the same time. This is possible even when you are working with referral from more than one Cancer Activity.

To refer more than one grant to another NCI Program at the same time, take the following steps:

- 1. Choose the new Cancer Activity from the Refer to CA list
- 2. Provide any Referral Comment in the Refer to text area (optional)
- 3. Select the box for each grant to be referred

Referral Refer To Other Program



4. Press the 'Apply to Selected Grants' button

Referral Refer To Other Program



5. Press Refer to Other Program

Referral Refer To Other Program Results

Grant Number	CA	PI Name	Institution	New POC	Refer to Other Program Results
1R01CA122688-01	BG	McCOMBIE	COLD SPRING HARBOR LABORATORY	Grotzinger, Karen R.	SUCCESS
1R01CA122500-01	BG	YANG	VANDERBILT UNIVERSITY	Grotzinger, Karen R.	SUCCESS

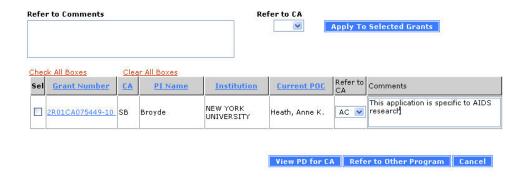
Return to Referral Activity

You can repeat these steps for each Cancer Activity that is going to get a referral.

Individual Referral to Other Program

You can manually assign a Cancer Activity or comment to a grant by choosing the Cancer Activity from the Refer To list located in the grant's row.

Referral Refer To Other Program



Grants

The Grants section contains the basic information about the grant. A list is provided to select the Cancer Activity it should be referred to

Screen Title	Definition
Sel	The Select box used to take an action against the
	grant.
Grant Number	The grant number. To access the 'Everything You
	Ever Wanted To Know About' page, click on the
	grant number.
PI	The last name of the Principal Investigator
Institution	The name of the institution
Refer to CA	Contains a list of eligible Cancer Activities
Refer to Comments	Any optional comments about the referral

Sorting

Many of the columns in the acceptance list can be sorted. To sort, click on the hyperlinked column title that you wish to sort on. To reverse the sort, click on the hyperlinked column title again.

Referring to Other Program

Press the 'Refer to Other Program' button below the Grants list to re-refer the grant(s). The acceptance will be processed for any grant that has a Cancer Activity in the 'Refer to CA' list. Grants without a CA in the 'Refer to CA' list will be skipped.

To leave the page without process the referrals, press the 'Cancel' button. The application will return to the Referral Activity Query page.

Referral Refer to Other Program Results

The Referral Refer to Other Program Results page provides processing feedback on the referrals that have been re-referred.

Referral Refer To Other Program Results

Grant Number	CA	PI Name	Institution	New POC	Refer to Other Program Results
2R01CA075449-10	AC	Broyde	NEW YORK UNIVERSITY	Witherspoon, Kim	SUCCESS

Grants List

The list contains each processed grant and the results of the processing.

Screen Title	Definition
Grant Number	The grant number. To access the 'Everything You
	Ever Wanted To Know About' page, click on the
	grant number.
CA	The NEW Cancer Activity assigned to the grant
	based on the referral to other program
PI	The last name of the Principal Investigator
Institution	The name of the institution
New POC	The name of the new Point of Contact for the
	referral based on the new Cancer Activity assigned
	to the grant (only provided on successful
	processing)
Refer to Other Program Results	The results of the Acceptance: SUCCESS or
	FAILURE

If the Refer to Other Program Results is SUCCESS, then the referral has been referred to another program.

If the Refer to Other Program Results is FAILURE, then no action has been taken. The reason for the failure is provided.

You can return to the Referral Activity Query page by pressing 'Return to Referral Activity.' The Query page should be updated and any grants that have been successfully re-referred will no longer appear.

Referral Release Dual

The Referral Release Dual page is where the dual referral is officially release by the Cancer Activity.

The grants selected on the Referral Activity Query page will be available on this page.

You can return to the Query page at any time by pressing the Referral Activity Query button.

Warning: All grants on the page will be released. If you have a grant on the page that you do not want to release, return to the Query page and reselect the grants.

Grants

The Grants section contains the basic information about the grant. An area is provided for comments about the referral rejection.

Screen Title	Definition
Grant Number	The grant number. To access the 'Everything You
	Ever Wanted To Know About' page, click on the
	grant number.
Institution	The name of the institution
PI	The last name of the Principal Investigator
Releasing CA	The Cancer Activity that will release the grant.
Dual CA	The <i>other</i> Cancer Activity that will be able to take
	action on the Referral after the release is processed.
Dual POC	The Point of Contact for the <i>other</i> Cancer Activity

Sorting

Many of the columns in the Grants list can be sorted. To sort, click on the hyperlinked column title that you wish to sort on. To reverse the sort, click on the hyperlinked column title again.

Releasing the Dual Referral

Referral Release Dual

Grant Number 1	Institution	<u>PI Name</u>	Releasing CA	Dual CA	Dual POC
2R01HL044984-17	DUKE UNIVERSITY	SUNDAY	SB	ТВ	Mohla, Suresh
2R01GM066306-05	UNIVERSITY OF VIRGINIA CHARLOTTESVILLE	MACARA	SB	СВ	Spalholz, Barbara



Press the Release button below the Grants list to release the referral(s). The rejection will be processed for all grants in the list.

To leave the page without processing the referrals, press the 'Cancel' button. The application will return to the Referral Activity Query page.

Referral Release Dual Results

The Referral Release Dual Results page provides processing feedback on the dual referrals that have been released.

Referral Release Dual Results

Grant Number	PI Name	Institution	CA	Current POC	Release Results
2R01HL044984-17	SUNDAY	DUKE UNIVERSITY	ТВ	Mohla, Suresh	SUCCESS
2R01GM066306-05	MACARA	UNIVERSITY OF VIRGINIA CHARLOTTESVILLE	СВ	Spalholz, Barbara A.	SUCCESS

Return to Referral Activity

Results List

The list contains each processed grant and the results of the processing.

Screen Title	Definition
Grant Number	The grant number. To access the 'Everything You
	Ever Wanted To Know About' page, click on the
	grant number.
PI	The last name of the Principal Investigator
Institution	The name of the institution
CA	The Cancer Activity that must now take action on
	the referral
Current POC	The current Point of Contact on the Referral
Release Dual Results	The results of the Acceptance: SUCCESS or
	FAILURE

If the Release Dual Results is SUCCESS, then the referral has been rejected.

If the Release Dual Results is FAILURE, then no action has been taken. The reason for the failure is provided.

You can return to the Referral Activity Query page by pressing 'Return to Referral Activity.' The Query page should be updated.