What has Changed?

This release included a number of larger enhancements as well as a bunch of small enhancements and bug fixes. These changes primarily focused on changes to the Cost Sharing question and new agreement types but there are also a few exciting changes for everyone.

Some highlights include:

- Two new agreement types: Other Transaction Authority & Student Aid
- New cost sharing questions
- New functionality for managing sponsor in the system
- Integrating the OPACS questions directly on the PDRF approval page for faculty
- Ability to copy new PTA awards from existing awards
- New billing categories for AR

We hope you enjoy all of these new updates!

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Proposals & Awards

New Agreement Types: Other Transaction Authority & Student Aid
Two new agreement types have been added for “Other Transaction Authority” and “Student Aid” agreements.

The “Other Transaction Authority” agreement type can be selected as part of a PIF, PDRF, Award, and Parallel Transactions. Fields in the proposal and award transactions will be similar to that of a Contract. Transactions that route will follow a similar workflow as a Contract. Awards with this agreement type will also include a PTA transaction for setup.

The “Student Aid” agreement type is available within the PDRF, Award, and Parallel transactions. This will allow Student Financial Aid awards to be managed within SeRA. PTA setup transactions will be triggered from Award transactions with this agreement type.

Additional Cost Sharing Questions
The cost share region of the Budget Questions page on the PDRF and Award has been updated so that more information can now be captured. A row can be added to separate each cost share item and can specify if the source is Internal, External, or Subrecipient. Cost sharing will default as “yes” when it has been selected that a faculty member will be covering effort through cost sharing. We also added some additional information icons to provide further instruction for what is expected in each column. Links to add attachments (Commitment Letter or Form 33) will now also display when the source has been selected as External or Subrecipient.

The View PDRF and AAN/NOA have also been updated to show all the new cost sharing information.
As part of the changes, existing cost share data was converted into the new format on the budget questions page. Older transactions will not have a source selected and may need to be updated as part of the processing of newer proposal and award transactions.

Approval Reminders for School of Medicine Faculty

After the system moved infrastructure a year ago, the School of Medicine approval reminder emails were inadvertently stopped. This issue was corrected during this release and these emails will be sent again. As part of this change, the logic for sending these emails has changed slightly and these are now being sent daily to anyone who has a pending approval task for a SoM proposal or PIF, which meets the following criteria:

- Deadline or requested completion date is within 6 days
- Approval task has been pending for more than 5 days

Integrate COI Question with Faculty Approval

Previously, faculty approvals in SeRA required the faculty member to navigate from SeRA to OPACS and then back to SeRA to answer a couple simple questions related to conflicts of interest (COI). These questions have now been directly integrated with the approval page so that faculty can complete their COI questions and approve their proposal all on page within SeRA.

Additional Small Enhancements & Bug Fixes

A number of additional small enhancements and bug fixes were also completed during this release. These changes are described below:

- Comments in the transaction history report on the Transaction Home page can now be viewed by simply hovering over the comment icon. No longer needed to click and open a pop-up!
- Help icons have been updated throughout the system to leverage some in-built help text functionality. As a user, the primary difference is that the help icons are now shown to the right of the field rather than to the right of the field label.
- "University Research" has been removed as an agreement type for the PIF since these agreement types are processed by OSR and not RMG.
- The accountsetup@mailman.stanford.edu and rco-irbfee@mailman.stanford.edu recipients have been removed from the AAN/NOA email since these distribution lists no longer exist.
- We have fixed the data for some projects, which previously had an issue with budget exclusions being incorrectly excluded from TBD.
- We now show Estimated Care Costs to all users on the BQs page for CTs. This field was previously being hidden for non-central office users.
- Now the CT subtype can be changed at any time. Previously it was incorrectly locked during a proposal after routing.
- The error messages and fields now have consistent messages and labels on the Return for Major and Minor Edit page.
- The column headings on the Project Summary (subawards/other transactions) were updated to be consistent with other locations in the system.
- The transaction complete date is now shown as the "Date Issued" in the Funding History page (and Segment Summary) rather than the date the IO last saved the Funding History page.
● The Misc. Consultation option has been removed from the Start Transaction LOV for non-central office users. Previously this option was available, but the transaction would encounter issues if a general user started the transaction.
● Departments that are not marked as research orgs now display their name within transactions. Previously these departments were showing only the department ID. Additionally, a warning message is shown saying the org is not a research org.
● The grants.gov tracking number is now shown on the Proposal Summary page when a proposal has been submitted through Cayuse. (Previously this was only shown within the transaction itself.)

Central Office Enhancements

Upgrades for Entity Management
The entity management application (aka Sponsor Maintenance) has been upgraded with a number of new enhancements. The entity type options of “US Other”, “Foreign Other”, and “Foreign Foundation” were removed as options.

New fields were added for US federal entities to record the US federal department, and US federal agency a US federal entity is belongs to. These fields are used for reporting purposes.

The main section of the sponsor details page was also updated and consolidated with the website URL region of the page. Sponsor details, attributes, and website URL can now be viewed and edited in one region.

Additionally, the Projects page for an entity shows more information about the entity’s role for each projects. For example, projects that list the entity as a subrecipient, can now be viewed as well as project specific IDC waivers. Additionally, the Contacts region now shows the projects each contact is associated with.

Finally, the various different pages have been reviewed and cleaned up with consistent column names in tables and more text that is informational.

New Collection Categories & Status for Billers in ARC
In the invoice page, additional “Collection Categories” have been added to assist AR users in properly classifying collection issues on open invoices. This has also been added as a column to display in the Dashboard, AR Search, and the Invoices report on the Award page.
Copy PTA Award

Existing Oracle awards can now be copied when creating a new award. This is available in all PTA setup transaction types (Early/Extend, New, and Amendment). To use this functionality select “Copy Existing Award” in the Add Award pop-up. A list of available awards that can be copied will display. Continue by selecting a new or existing project and task(s). Users will be directed to the edit award page for the new award. All fields will be copied if available and may be edited as part of the setup.

Additional Small Enhancements & Bug Fixes

A number of additional small enhancements and bug fixes for central office users were also completed during this release. These changes are described below:

- Simplified some logic on the Terms & Conditions page to remove CT restrictions that will never actually come up.
- Other Agreement Logs now show the PI and the period of performance for linked OALs to provide more information about these linked agreements.
- The waivers region within a parallel award transaction is now locked to prevent this section from being wiped out when the parallel proposal transaction is completed.
- Reassigning a subaward transaction during the “Send to IO” step now works the same as a typical reassign step within the transaction.