Listed below are notes of key discussions held:

- **Excellence in Research Administration Implementation Update – Presentation by Huron Consulting Group**  (Refer to related Huron PowerPoint presentation on ORSP-DGCA Advisory Team webpage for details)
  
  o The Huron consultants discussed that five (5) of the eleven (11) Wave I implementation workgroups have kicked off. The remaining six (6) workgroups will kick-off by mid-June.

  o Departmental administrators will be asked to participate in the following four (4) workgroups; Award Management, Proposal Submission, Subrecipient Monitoring/Subaward Execution and Award Closeout. Changes recommended in the other workgroups will be brought to this ORSP-DGCA Advisory Team for feedback.

  o The Excellence in Research Administration website was launched in May. Updates will be posted from the workgroups to this site on a regular basis.

- **Greenphire Clincard Update – Presented by Patricia Dalton, Director of Research Policy, NJMS**  (Refer to related Greenphire presentation on ORSP-DGCA Advisory Team webpage for details)
  
  o Pat Dalton announced that the University is scheduling demonstrations of Greenphire’s Clincard system on the various campuses and invited attendees to participate for their feedback.

  o The Clincard system would be an alternative method available to Principal Investigators to disburse human subject incentives/fees on their studies if licensed by the University.

  o In brief, the Clincard system issues debit cards, which study subjects may take to a bank to obtain cash if they choose or use simply as a VISA card.

  o The system offers other functionality which the University may benefit from, including compiling 1099 information, capturing key study data and its reporting capabilities.

  o Anyone interested in learning more about the Clincard system is encouraged to contact Pat directly at daltonpm@njms.rutgers.edu.
• RAPSS Update

  o To date, two (2) proposals have been successfully submitted to NIH via RAPSS. Fifty-seven (57) NIH proposals are currently in development in RAPSS as of May 19.

  o If the June NIH proposal submissions go well, the roll-out of RAPSS for other new Grants.gov submissions will commence July 1. Members will be kept apprised of the proposed roll-out for other sponsors.

  o All were encouraged to let their faculty know to contact their ORSP Grant Specialist if they plan to submit in July or August. Please note that for NSF submissions, ORSP is requesting that units complete the questions in the RAPSS funding proposal module (i.e. the electronic endorsement form) but they can submit the full application through Fastlane as usual.

  o Details concerning the RAPSS roll-out will also be communicated via the ORSP website, faculty and staff newsletters and other channels.

  o The current list of Approvers is now posted on the RAPSS website at http://orsp.rutgers.edu/rapss. This listing is dated as of May 15.

  o The structure of the list essentially categorizes groups by campus/school/department and by approver level. Some departments have two levels, while others have more. Be sure to scroll across to see all levels for your unit.

  o If you need to remove and/or add an approver, please use the approver form also located on the RAPSS webpage.

  o To make a change, you do not need to fill out the entire form with your approval hierarchy indicated; you simply need to record on the form who is being removed, if applicable, and who is being added, if applicable. To add an approver, ORSP needs to know their level of approval and the HR Org Id. The approver’s netid is also very helpful, if available.

  o In the coming weeks, ORSP will be discussing the reports that they would like to build out of RAPSS with members for feedback.

  o While there is a function to do some custom reporting within RAPSS, ORSP will need to plan for their standard and frequently-requested reports to ensure that the proper data is captured within RAPSS. RAPSS dates and time stamps transactions, so ORSP can more effectively measure transition times and process efficiencies.

  o The budget grids in RAPSS, scheduled to be rolled-out as part of Phase II will help faculty and staff in preparing a complete and accurate budget and will be discussed with members, also in the coming weeks.

  o For those who want to play in the Huron Click Commerce Starter Site for Grants & Contracts (the product that Rutgers bought and is now customizing for its use), one can go to the following demo site to play around. You will note that it looks slightly different than the current production and test RU sites due to our
customization, but the structure and functions are the same. You may wish to go into the site to see what is captured in Awards and in the Budget Grid sections, in particular. The link to the site is: https://rutgersgrantdemo.huronclick.com/RutgersGrantsDemo/

- Please use the following usernames and password to enter this starter site in the different roles:
  - To enter as PI: PI, 1234
  - To enter as Department Approver: bmreviewer1, 1234
  - To enter as a Grants Specialist: gtest, 1234

- New Fund Type Being Introduced for Privately Funded Clinical Trials
  - It was discussed that the manner in which revenue recognition on sponsored clinical trials (CT) is currently being recorded in Banner is inconsistently treated and inaccurate; a matter which must rectified for this year-end’s financials.
  - In consultation with our external auditors, they have confirmed that briefly stated that CT revenue should be recognized at time of billing and reflected in Banner accordingly.
  - As an initial step to begin to address this matter, a new restricted fund type 2K will be introduced this month in Banner. Fund type 2K, defined as Private Clinical Trials is intended to segregate active privately-funded clinical trials from their current fund type classification of 2P (Private Awards) in Banner.

  - Funds/indexes reclassified to Fund Type 2K will:
    - . Remain the same index number
    - . The history of the index will remain
    - . All reports (in E-Print & CRL) will still be used to report on these indexes (i.e. FYRGRNT will still function).
    - . Remain a non-revenue recognition fund type. Revenue will continue to be recognized upon payment, on a cash basis until further notice.
    - . The fund balance information will be retained from year to year and its budget will roll-over annually

  - The listings that each of members provided to DGCA in December of their unit’s active clinical trials in fund type 2P will be the primary source for the reclassification of existing indexes to this new fund type for the May month-end close. New privately funded clinical trials indexes established since January will also be reclassified. New private clinical trials will be established in Banner using this new fund type effective June 1, 2015.

  - During the month of May, DGCA will meet with each RBHS unit who has active CTs to discuss steps on how each unit will provide their monthly CT billing data to DGCA in order to record the applicable AVR & revenue entries manually in Banner until the University implements a university-wide CTMS or until the new
ERP GL/A&R systems go-live. Initially, the focus will be on the active 2P/2K CTs, but a similar process will also be required for other-funded CTs, such as federal funded.

- In conjunction with this initiative, DGCA provided members with a listing of draft proposed CT status codes/definitions as follows for members feedback by next month’s meeting:
  - **Open to Accrual** – Study is open and actively accruing new patients for treatment
  - **Closed to Accrual** – Study is still open, but no longer actively accruing new patients – just treating patients who are in study
  - **Suspended** – Study is under review, typically due to pending amendment or when an interim analysis is being conducted. Study remains open for those patients in treatment
  - **Terminated** – Study is closed. All patients are off treatment and all data requirements have been met between unit and sponsor.
  - **Closeout in Process** – Formal financial closeout in progress by unit
  - **DGCA Closeout Completed** – Formal financial closeout received from unit and reviewed, any residuals calculated and transferred to discretionary index, and inactivation of CT index by DGCA
  - Additionally, a draft procedure on how CTs should be financially closed out was distributed to members for feedback by next month’s meeting.

- **Space Survey**

  - Final preparations are underway for the University’s space study. Data collection of each school’s administrators who will confirm and functionalize their departments’ space for F&A purposes will be distributed in the near future. All individuals identified as part of this data collection effort will be required to attend training prior to being granted access to the web-based system that will be used to capture this survey. Hands-on training is being scheduled on all campuses. Details will be published once available.