EPEX – Emory's Proposal Express System

Training and Communication Plan

EPEX is Emory's new electronic proposal routing system. It has been developed in PeopleSoft as part of Project Compass and will go live with the rest of the PeopleSoft system on 9/1/09. Use of this system is required and will allow faculty and their administrators to electronically route their proposals and track where the proposal is in the approval process. The highlights of the system include:

1. The system replaces our current SPAF (Sponsored Programs Approval Form) with an online system that will electronically route the information and proposal for the required approvals.

2. The system provides a budget tool to assist in completing the budget and ensuring that the calculation and correct rates are included.

3. At all times, anyone involved in the proposal process will be able to view where the proposal is so proposals cannot be "lost". Time stamps will track the travels of the proposal and how long is spent awaiting the various approvals.

4. For almost all proposals, the system eliminates the need to physically carry the proposals around for approvals and to OSP. Only rare proposals that require the original signature of the PI and OSP will need to be physically carried.

5. Upon school approval, the OSP Analyst will have immediate access to the proposal. In the past, the proposal had to be physically carried to OSP and left at the front desk where it would need to be logged and assigned.

6. While it is planned for future development, the system does not feed directly into grants.gov so researchers will still be required to continue the current process for grants.gov (while utilizing EPEX as the SPAF had been used in the past). OSP's drop box for grants.gov submissions will continue to function as it does now.

7. The paper SPAF will not be available after 8/31/09 and use of EPEX will be required.

8. Industry Clinical Trials that required the use of a SPAF in the past will be required to be routed through EPEX and can be routed to the Office of Clinical Research in this routing process.

9. In the rare case that EPEX/PeopleSoft is not available, a process has been developed to allow proposals to be routed outside of the system. It is expected that this will not occur but we are prepared in the case that it does.

10. All faculty will have automatic access to the system on 9/1 at go-live.

Communication –

Our communication plan has been multi-fold. We've employed the usual techniques, sending messages to our listserv which reaches a large number of members of our research community, as well as, including articles in our monthly newsletter and the Project Compass newsletter. We have provided overviews and demos at many faculty and departmental meetings. We have sought out opportunities to do presentations and have made ourselves available to speak formally or informally to any group who has asked. Demos have occurred or are scheduled in the SOM, Yerkes, the College and several other forums.   From the early developmental stages of EPEX, we have met with faculty, departmental administrators and school business officers to obtain feedback. Our listserv messages have been forwarded to other listservs including the Project Compass listserv and the OCR listserv. Utilizing HR's faculty listserv, an announcement will be sent out during the week of August 10 to all faculty. Internally, we've developed an EPEX webpage as an extension of our standard website to keep parties up to date with the latest information regarding EPEX including information on how to access EPEX training and how administrators can gain security access to EPEX via the EPEX Access form. This page will continue to be updated with relevant information and will be used to communicate faq's, workflow information, tips and tricks and status changes as necessary. The page can be accessed at http://www.osp.emory.edu/OSP_other/EPEX.cfm. On August 10, we received the final confirmation of our go-live date as 9/1/09 and will be ramping up the final stages of our communication efforts.

Training –

Training is being offered in two ways to address the needs of the participants. It is being offered as an in-person, instructor led course and also as a distance learning course for those students who prefer to learn on their own. Our instructor led courses began on July 21 and for three weeks (until 8/3) consisted of two courses a day, once a week for a total of 6 instructor led courses. Since 8/3 and through the end of September, one instructor led course is scheduled per week (for a grand total of 13 instructor led courses). Each of the instructor led courses also consists of a learning lab, which permits the students to walk through what they've just learned in the User Productivity Kit (UPK) simulated format and ask whatever questions they may have. Additional instructor led EPEX courses will be offered in the fall and will be added to our usual Educational Series sessions in the future and will be offered based upon demand.

The distance learning course (DL), which mirrors the instructor led course in content became available on July 27th and is available via the web 24 hours a day, 7 days a week to capture those users who prefer to learn on their own or whose schedules will not permit them to attend one of the instructor led courses. These users also have the opportunity to attend a learning lab at their discretion. The DL course will be available indefinitely to for access by new hires and users who want to access the training after the initial implementation period. Additional "Job-Aids" providing quick references for users will be available online.

Additionally, we have offered to conduct individualized training to select groups like the Clinical Research Coordinators to meet their unique needs regarding Clinical Trials.

Help Desk/Call Center –

From 9/1 through mid October, a conference room in the 1599 Clifton Building (4B) and staff will be dedicated to supporting EPEX. They will be available to respond to phone calls, emails and in person inquiries regarding EPEX. There will be computers available for those who need assistance in entering their proposals. A direct phone number to this group will be available and highly publicized. A minimum of 2-3 staff members will be available for support at all times and multiple phone lines will be set up to respond to inquiries.

Melissa Kuskie and Camilah Hicks who have been the trainers on the Instructor led course will be available for questions throughout the go-live process. Following go-live, Camilah will be responsible for keeping the materials up-to-date and along with the University-wide Grants Super Users, will be responsible for addressing the Grants-related questions from the Emory Community. Grants Super Users have been identified throughout the University and are receiving additional training on how to address questions and will be made aware of the contact information for the EPEX Help Desk. Some schools will have other resources available. Emory College will have a lab available to provide support and guidance for all areas of PeopleSoft.

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Requests for further information, EPEX demos or presentations should be forwarded to Kerry Peluso, Associate Vice President for Research Administration at (404) 727-0551 or kpeluso@emory.edu*.*

Research Administration Newsletters can be accessed at
http://www.osp.emory.edu/communication/newsletter/index.cfm

Project Compass (Emory's PeopleSoft Project) can be accessed at
http://compass.emory.edu/