Today’s Agenda

- **Introduction/Background**
  Martin Wybourne and Joe Doucet

- **Overview of Huron Click Portal Solutions**
  Tony Haber

- **RAPPORT Project at Dartmouth**
  Kathy Merchant, Susan Adams, Jill Mortali, Liz Bankert
Background

**Current Status**

- ~ 1,000 active awards and ~ 1,000 new submissions annually
- ~ 520 PIs
- ~ 3,000 IRB actions annually
- ~ 4,000 COI disclosures annually
- Current System = COEUS + Homegrown COI

**Identified Need and Opportunity**

- Replace COEUS and enhance functionality by early 2013
- Reduce administrative burden on faculty and staff
- Streamline administrative processes
- Streamline routing and approvals

11/14/2011
## Background

### Electronic Research Administration Committee
- Evaluated available solutions
- Gathered input from other institutions
- Recommended Huron’s Click Portal Solutions for Grants, IRB, and COI

### RAPPORT Project Management Team
- Worked closely with senior leaders to secure support and funding
- Hired project team
- Negotiated contract with Huron Click

11/14/2011
Partnership with
Huron Click Portal Solutions

Dartmouth

Huron Click
Dartmouth RAPPORT Project Team

**Project Sponsors**
- Joe Doucet, Deputy CIO and Director of Institutional Information Systems and Services (IISS)
- Martin Wybourne, Vice Provost for Research
- Kristen Rhodes, Administrative Assistant

**Project Mgmt Team**
- Kathy Merchant, RAPPORT Project Manager
  - Project Mgmt
  - Weekly Reports
- Liz Bankert, Assistant Provost
  - Communications
  - COI
- Susan Adams, Director, CPHS
  - IRB
- Jill Mortali, Director, OSP
  - Proposal Dev’t/Mgmt
- Todd Langille, Project Manager, Institutional Information Systems and Services
  - Technical
  - Testing

**Support Team**
- Business Analysts
  - Workflow, decision trees, etc.
  - Priscilla Grover
  - Carla Chandler
  - Greg Castell
- Developers
  - IT Implementation
  - Pradeep Frederick
  - Neil Odell
- Subject Matter Experts (temporary)
  - Policies
  - Jennifer Friend, Grants
  - Stephanie Morgan, Grants
  - Ann O’Hara, IRB
  - Kimberly Lyford, IRB

**Working Groups**
- Communication, Change Mgmt, Training
- COI
- IRB
- Proposal Development/Management
- Technical
- Testing

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Click™ Portal

Tony Haber
Huron Consulting: Unique Capabilities

Higher Education Consulting Services
- Regulatory Compliance
- Research Administration
- Strategic & I.T. Planning
- Process Improvement
- Organizational Transformation
- Risk Management
- Financial and Budget Planning

Software System Implementation Services
- Project Planning
- Functional Design
- System Development
- System Testing
- Documentation & Training
- Deployment Services
- Sustaining Services

eResearch Software Products
- Grants & Contracts
- IRB
- Conflict of Interest
- IACUC, AOPS
- CTMS
- Safety Committees

Improved Research Administration Business Processes
How Huron’s Solutions Help

- Interconnecting research teams for greater productivity
- Simplifying processes for administrators & researchers
- Improving researcher satisfaction with reduced administrative burden
- Providing organizations a platform for continuous process improvement
Expert Protocol Automation

Consistent Research User Experience

Grant Proposal (NIH R01)
- Primary Budget
- Sub-award Budget
- Personnel
- SF424 Application

IRB
- IRB Study
- IRB Audit

COI Financial Disclosure

Reporting
Proposal Workspace

- Molded to your forms and routing
- Access through popular browsers: IE, Chrome, Firefox, Safari, Mozilla
- Conditional branching between pages
- Error checking; completion summaries
- Configurable help text
- Supports Mac & PC
## Click Portal for Research

### Click Portal Framework & Tools

<table>
<thead>
<tr>
<th>Clinical Trials</th>
<th>Compliance</th>
<th>Research Administration</th>
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<tr>
<td>Participant Tracking and Billing</td>
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### Existing Systems
- Human Resources
- Accounting
- Animal Database
- Electronic Medical Record
- Data Warehouse
Top Funded Research Institutions
Who’s Using Click Portal Solutions?

American Heart Association
Cedars-Sinai Health System
Chesapeake Research Review, Inc.
Children’s Hospital Boston
Children of Los Angeles
The Children’s Hospital of Philadelphia
Children’s Mercy Hospital
Children’s National Medical Center
Cincinnati Children’s Hospital Medical Center
Cleveland Clinic
Duke University
East Carolina University
Emory University
Fox Chase Cancer Center
Georgetown University
Georgia Health Sciences University
Hackensack University Medical Center
Health Sciences South Carolina
Hospital for Special Surgery
The Johns Hopkins University
Kaiser Hawaii/GA
Kaiser Permanente Northwest
Lawrence Berkeley National Laboratory
Lehigh Valley Health Network
Mayo Clinic
MD Anderson Cancer Center
Medical College of Wisconsin
The Methodist Hospital Research Institute
The MetroHealth System
NASA
Northwestern University
New York University Langone Medical Center
Ochsner Clinic Foundation
The Ohio State University
Ontario Institute of Cancer Research
Oregon Health & Science University
The Pennsylvania State University
RAND Corporation
The Research Institute at Nationwide Children’s Hospital
Rush University Medical Center
St. Jude Children’s Research Hospital
Texas Health Research & Education Institute
University of Alberta
University of Arkansas for Medical Sciences
University of British Columbia
University of Calgary
University of California Los Angeles
University of California San Diego
The University of Chicago

University of Cincinnati
University Corporation for Atmospheric Research
University of Florida
University of Maryland
University of Massachusetts Medical School
University of Medicine & Dentistry of New Jersey
University of Miami
University of Michigan
University of Pittsburgh
University of Rochester
University of South Florida
University of Southern California
University of Texas at San Antonio
University of Texas Southwestern Medical Center at Dallas
University of Utah
University of Washington
University of Wisconsin
VA Pittsburgh Healthcare System
Virginia Commonwealth University
Wake Forest University
Weill Cornell Medical College
Western Institutional Review Board
RAPPORT Project Scope

Research Community

Proposals
- Preparation, routing, approvals, submissions, and tracking

IRB
- Applications, routing, tracking, and review

COI
- Disclosures, review, and management

RAPPORT

11/14/2011
**Estimated Project Timeline**

- **Phase 1**
  - Grants Xpress (SF 424)

- **Phase 2**
  - Full Grants

- **IRB**

- **COI**

**Communications**

- **11/14: Kickoff**

**Timeline:**
- **2011**
  - OCT: Phase 1
  - DEC: Phase 2
- **2012**
  - JAN: IRB
  - FEB: Communications
- **2013**
  - MAR: COI
  - APRIL: Communications
- **2014**
  - MAY: Communications
IRB Working Group

- IRB working group will be established when work on IRB module begins in Spring 2012

COI Working Group

- COI working group will be established when work on COI module begins in 2013
- Task Force currently working on recommendations for compliance with new PHS COI rules
# Grants Working Group

<table>
<thead>
<tr>
<th>Mortali</th>
<th>Jill</th>
<th>OSP</th>
<th>Director</th>
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<tr>
<td>Ayres</td>
<td>Donna</td>
<td>TDI</td>
<td>Director of Research Administration</td>
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<tr>
<td>Ballou</td>
<td>Tracy</td>
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<td>Blandin</td>
<td>Jean</td>
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<td>OSP</td>
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<td>Carr</td>
<td>Audrey</td>
<td>Surgery</td>
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<td>Harrington</td>
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<td>Havrda</td>
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<td>Howe</td>
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<td>Langille</td>
<td>Todd</td>
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# Communications Working Group

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<th>Bankert</th>
<th>Liz</th>
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<td>Lorri</td>
<td>CPHS</td>
<td>Human Subjects Research Analyst and Educator</td>
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<td>Alison</td>
<td>Microbiology</td>
<td>Financial/Administrative Manager</td>
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*TBD – Representative from CTO*
WELCOME!

The RAPPORT Project is in the early stages of developing an integrated research administration system that will include:

- online proposal routing, approvals, submissions, and tracking;
- online IRB applications, routing, tracking, and review; and
- online COI disclosures, review, and management.

RAPPORT is being designed, built, and implemented to streamline administrative processes and expedite routing and approvals while reducing administrative burden on faculty and staff.

ANNOUNCEMENTS

RAPPORT Project Announcement (pdf)
Memo from Martin Wybourne announcing the RAPPORT Project

RAPPORT Project Kickoff Sessions on November 14 (pdf)
Kickoff sessions to introduce faculty and staff to early phases of the project
QUESTIONS?