MEMORANDUM

TO: UNC Charlotte Research Community

FROM: Rick Tankersley, Vice Chancellor for Research and Economic Development

SUBJECT: New Niner Research Modules

DATE: 3/9/2021

Synopsis

- *The new Niner Research electronic research administration (eRA) system is now available for proposal development, tracking, and approvals.*
- *NORM, the current eRA system, is retiring on May 15, 2021. Faculty and staff are encouraged to participate in live training sessions planned for the next several weeks.*
- *Users complete training to become certified as Niner Research Champions, Experts, or SuperUsers. Video tutorials covering basic and advanced features and topics are also available.*
- *The launch of Niner Research coincides with updates to Policy 20.2: Deadlines for Proposal Submissions to University Offices. Proposers are encouraged to review these new deadlines with their College Research Office staff and Associate Deans for Research and plan accordingly.*

For over two years, campus research administrators have been working with the staff of OneIT to replace the NORM electronic research administration (eRA) system with a new, integrated system from InfoEd Global. The new system provides a range of new features and tighter integration of the diverse aspects of our research enterprise, including proposal and contract administration, conflict of interest management, the use of laboratory animals, biosafety, and human subject research. All features and components of this replacement for NORM, called Niner Research, will be fully operational by September 30, 2021.

Last fall, we successfully rolled out the new Conflict of Interest (COI) module as part of the annual disclosure process. We are now ready to launch the "heart" of the new system - the modules associated with grant submission and post-award administration (Proposal Development, Proposal Tracking, and Award Tracking).

Launch of Niner Research and Retirement of NORM

Because of the complexity of the system and the need to familiarize and train all faculty and staff involved in grant seeking and proposal and award management, we have worked with the college research offices to establish a comprehensive onboarding schedule that involves targeted training for users with different roles and needs and the identification of "early adopters" that will be the first to submit proposals using the new system.

NORM will officially retire as our system for proposal development and submission on May 15, 2021, but colleges will be permitted to transition to the new system at their own pace over the next two months. During

the summer, the Niner Research development teams from RED and OneIT will work with InfoEd and the UNC System Office to migrate data and information currently housed in NORM to Niner Research. The remaining modules, including several of the management systems for human subjects and animal protections, will be completed and launched later this summer.

Select staff in the college research offices have already been granted access to the new modules and will complete the necessary training to become "**Niner Research SuperUsers**" by mid-March. Many of them were deeply involved in the development of the modules, giving them a deep understanding and knowledge of the system and its capabilities. They are prepared to provide local support and assistance, including one-on-one coaching.

Niner Research User Groups

To help guide the training needs of faculty and staff, we have divided potential Niner Research users into the following affinity groups:

- **Viewers** – Staff, including departmental administrators, who need to access and consult Niner Research grants modules periodically to review key documents, including proposal files, budgets, and compliance forms.
- **Approvers** – University leaders, including deans, directors, chairs, and other unit heads, who need to access the system periodically to approve proposal records prior to submission.
- **Developers** – Research staff and administrators and faculty who will be involved in developing, assembling, and submitting proposals. This group includes anyone who will potentially serve as a principal investigator (PI) on a proposal or award.
- **SuperUsers** –Research administration staff who will utilize the system regularly to manage the life cycle of a grant, including proposal preparation and submission, award processing and tracking, and post-award management. They may also be responsible for preparing proposal budgets and checking proposals for compliance prior to submission.

Live Niner Research Grant Module Training

Training in the navigation, features, and use of Niner Research is divided into four 1-hour sessions (Table 1). Sessions 2-4 build upon the content of the previous sessions. Therefore, they should be taken in sequence. Viewers and Approvers are encouraged to become **Niner Research Champions** by completing the first training session, which provides a broad overview of the grants modules, including the proposal reviewer dashboard. Similarly, **Developers** are encouraged to complete sessions 1 and 2 to be certified as **Niner Research Experts**. **SuperUsers** require more advanced training and are encouraged to complete all four sessions. Training certifications (Niner Research Champion, Expert, and SuperUser) will be issued following the successful completion of the corresponding training requirements.

Online, instructor-led training sessions begin this week (March 8) and will continue for the next 12 weeks. Space is limited and registration through Percipio is required. Please use the links below to register for one or more of the sessions.

1. Session 1: Introduction to Niner Research Grants Modules
2. Session 2: Proposal Development Basics
3. Session 3: Complex Budgets and Tracking Proposals and Awards
4. Session 4: Award Tracking and Agreements

Table 1: Niner Research training sessions and associated topics for Champion, Expert, and SuperUser level certification.

Training Sessions and Topics	Champion (Viewers and Approvers)	Expert (Developers)	SuperUser
1. Introduction to Niner Research Grants Modules ● Overview of Proposal Development and Proposal Tracking ● System Terminology ● Navigating Module Screens and Tabs ● Routing, Approval, and the Reviewer Dashboard	X	X	X
2. Proposal Development Basics ● Development and Submission Deadlines (new policies) ● Creating a New Proposal from Development to Submission for Internal Approvals ● How to Complete an IPF ● Waiver Requests and Approval ● Finalizing and Submitting a Proposal		X	X
3. Complex Budgets and Tracking Proposals and Awards ● Developing Complex Proposals: Detailed Budgets, Subawards and Cost Sharing ● Authorizing a Submission ● Post-Submission Activities, including Revised Budgets			X
4. Award Tracking and Agreements ● Award Tracking Overview and Navigation ● Post-award Review, Setup, and Workflow ● Tracking Agreements			X

Video Tutorials

In addition to the live training sessions outlined above, the RED staff are preparing a series of short tutorials and video demonstrations to help users become familiar with both the basic and more advanced features of Niner Research. If you would like to suggest a tutorial topic for our consideration, please email us at ninerresearch@uncc.edu.

Update to Policy 20.2: Deadlines for Proposal Submissions

To accommodate some of the new features available in Niner Research, including enabling direct system-to-system submissions to federal programs, we are updating and amending the deadlines for proposal submissions to university research offices (Research Administration Policy 20.2).

The current policy calls the administrative shell for the electronic Internal Processing Form (e-IPF) to be completed at least five (5) business days prior to the funding agency or sponsor deadline. Under Niner Research, an IPF must be initiated ten (10) business days in advance of the sponsor's submission deadline. The budget and all remaining sections of the IPF must be completed and the routing process for approvals initiated at least five (5) business days in advance of the submission deadline. Finally, at least two (2) business days in advance of the deadline, **all final application materials** must be received by the office that will be responsible for authorizing the submission. Proposals must complete the routing process and receive all required approvals before submission. This new timeline and associated deadlines will be formally announced in early April and will be effective May 15, 2021.

Who to Contact With Questions?

If you have any questions about the launch of Niner Research Grants Modules or have questions about how to complete specific sections of a submission or IPF, please do not hesitate to contact the appropriate RED points-of-contact listed below.

Areas and Topics	Contact(s)	Email	Phone
System Administrator (Access and Technical Questions)	Chris Krumm	ninerresearch@uncc.edu	704-687-1865
Proposal Development	Ellen Zavala Stafford Famer	research@uncc.edu	704-687-1881 704-687-1860
Proposal Tracking Subawards Change Requests	Nikki Simmons Leslie Jenkins	grants-contracts@uncc.edu	704-687-1885 704-687-1868
Agreements	Nikki Simmons Debbie Bolick	grants-contracts@uncc.edu	704-687-1885 704-687-1883
Award Tracking Change Requests Financial Tracking Fund Setup	Darlene Booker Kathy Edwards	gcapostaward@uncc.edu	704-687-1873 704-687-1858
Subrecipient Monitoring	Christelle McKinney Tracee Jackson	gcabilling@uncc.edu	704-687-1886 704-687-1863