INNOVATIVE WAYS OF USING INFOREADY AT UNIVERSITY OF TEXAS SOUTHWESTERN MEDICAL CENTER

infoReady

As with most other research admins utilizing InfoReady, Michael J. Winemiller, Research Administration Program Manager for the Simmons Comprehensive Cancer Center at the University of Texas Southwestern Medical Center, relies on InfoReady for limited submission competitions and internal funding opportunities. But with 12 years of experience in research administration, Michael is also a champion of exploring new avenues for taking advantage of the platform's capabilities:

> *I really want to emphasize the value that InfoReady has provided us in grants, contracts, intramural funding, RFP processes, and other applications since we acquired this product back in July 2019. But it's also worthwhile exploring InfoReady for alternative uses, specifically in streamlining administrative and HR processes for form collection and routing.*

That's why UT Southwestern also:

- uses the platform as a new hire intake system;
- pairs it with database software to generate ROI for both internal and external clients; and
- employs InfoReady capabilities for membership and financial functions.

And it's not just these added capabilities that make InfoReady invaluable for Michael and his team. It also eases processing and saves time by automating other formerly manual tasks.

Then and Now

Michael shares his story:

Before InfoReady it was kind of a sad situation with a lot of problems. We had a very manual process where everything was email based, so when it came to workflow it was a case of keeping up with a trail of emails, individual by individual. Plus, when you're working on an RFA or any type of process, you have multiple individuals applying and multiple individuals reviewing. That's a lot of back and forth and follow-up that has to occur, so we had a lot of email-based workflows – necessary to ensure all the emails and all the responses were able to keep the process moving.

That caused staff frustrations because getting lots and lots of email at a time can be overwhelming. You sometimes forget where you're at in the process, and it's just extremely time consuming. It also leads to dissatisfaction from reviewers and approvers because they're also getting multiple email reminders. And when this is all done manually, it's also difficult to track outcomes – whether on return on investment from grant awarded funds, or just a simple matter of something being approved or denied – because you're maintaining multiple Excel spreadsheets and other documents.

Grant competition problems solved

Michael's story of staff frustrations is repeated at universities throughout the world. It's why InfoReady's digital automation proved critical for Michael's team in providing an automated notice for anything a user has pending. It saved manual email reminders, effectively alerted researchers they needed to act on a request. and saved time and the number of staff members otherwise necessary.

When Michael's team at UT Southwestern implemented InfoReady for limited submissions and internal grant competitions, not only did their previous frustrations disappear, but they found the time to pursue other uses for InfoReady.

We quickly realized we could use the platform for any process requiring an approval cycle and vetted outcome, and that's when we started exploring how we could more broadly benefit from our InfoReady license.

One good example was automating position intake content, resignations, and RFA posting requests that we receive here at the Cancer Center. Being we're responsible for posting jobs for our laboratory basic researchers, InfoReady allows us to make quick updates as questions arise or hiring practices or policies change. With more efficient and expedited approvals and an improved workflow, we're better able to move from posting the position to securing funding to getting someone hired.

The same thing happens in reverse with resignations. We use InfoReady as a central point so the person leaving our institution can go in and complete all of the requirements, notify us of their termination, and receive managerial approval

– with InfoReady allowing us to retain a single document for the permanent record.

After two productive years of using InfoReady to automate manual processes at UT Southwestern Simmons Comprehensive Cancer Center, Michael's team has best practices worth sharing:

- Regardless of which InfoReady license you have, using General Template or Multi-Track can generate forms with different levels of customization.
- For forms with no specific due dates, it's important to ensure the opportunity submission timeframe is sufficient in length.
- Forms can be limited to specific organizations or individuals within your hierarchy if necessary.
- Competitions should be set to handle <u>unlimited</u> applications per individual if a form may be used multiple times by the same user.

But perhaps the most important learning for the UT Southwestern Medical Center team was simply thinking outside the box. In Michael's own words:

"Anything for which you are currently using a manual process, with a little imagination, can be something for which you can utilize InfoReady forms and routing!"

The following pages include visual examples of how the team at UTSMC has been using InfoReady.

The Position Request Form

Michael explains:

In the example above for position requests, the request is limited to the Comprehensive Cancer Center, but admins can leave it open to any user in the system or limit access as necessary.

Clicking on 'Start Request' takes the user to the next screen where they can update the job title they're requesting, include who the hiring manager is, to whom the position reports, and then add information such as salary, department ID, a list of job duties, visa sponsorship information, and a position justification.

Michael adds that these forms are highly customizable, making it possible to add questions about off-campus work related to medical research or patient care. The form template can also be re-used from year to year, allowing admins to quickly launch subsequent cycles and create consistency for improved reporting.

| Application: Position Request Form ⊙

Complete and submit the application below. The Personal Details section will be populated with information from your user profile where possible. Your entries are automatically saved while working within this site. Should you need to navigate away from the site or close your browser before completing the application, please click 'Save as Draft' below. You will be able to find and resume your application by clicking 'Applications' in the top navigation.

> This is your first application for this competition. You may start and submit up to 999.   ✕

Details ⌄

* indicates required

Application ID: (not yet assigned)

*Primary Lab: Michael

*Job Title Requested: Winemiller

*Hiring Manager: [   ] [?]

*Reports to: [   ]

*New or Replacement: [Select ⌄]

*If Replacement, provide name of current employee: [   ]

*Department #: [   ]

*Estimate Annual Salary: [   ]

Job Title: [   ]

Job Code: [   ]

*Estimated Start Date: [   ] 📅

*Position Type: [Select ⌄]

*Position Duties & Responsibilities:

[rich text editor toolbar]
Styles | Format | A▾ ▲▾

Words: 0/1000, Characters: 0/10240

*Will this position require visa sponsorship?: [Select ⌄]

*Why is this position needed?:

[rich text editor toolbar]
Styles | Format | A▾ ▲▾

We had a manual process prior to this form in which users provided us with an approval document that required them to sign, save and submit their application.

After that they click submit and it routes to the administrator for initial approval. Once we've accepted the form, it enters our predetermined routing steps, which is true for any form we have. In this case we have an HR manager approval and post process, so a confirmation notification is then sent back out to the requester, and they're notified that we'll begin the process.

With InfoReady, users are also allowed to add additional people who should be copied on any future correspondence.

This is a simple request form routed for approval, but we also do slightly more complicated forms – complicated because of our status as a comprehensive cancer center, which can require a lengthy process to obtain approval in certain cases.

For example, the Cancer Center membership intake review and approval form also notifies our new members of their approval, and we have the same process for cancer trainee membership. It's a separate RFA but it follows the same process except for routing to different approvers.

Membership Request

In the example here, we provide a full explanation of our criteria.

📄 PDF

Details

Administrator(s):	Stefanie Johnson (Owner)
Category:	Membership
Participating Organization(s):	Other - Non-UT Southwestern Entities
	Primary Department/Center
Award Cycle:	Continuous
Number of Applications Allowed Per Applicant:	1
Number of Possible Awardees:	Unlimited

Description

SCCC Membership Application

The Simmons Comprehensive Cancer Center membership is open to faculty of the UTSW Medical School, Graduate School of Biomedical Sciences, and UT School of Public Health in Dallas.
Applicants must hold the rank of Assistant Professor or above and must be involved in one or more of the following for consideration:

• Active in cancer research, as evidenced by serving as PI or Project Leader of cancer-relevant peer-reviewed research grants (NIH "R" level, DOD, ACS, Training, etc.)

• A leader in cancer clinical research, as evidenced by serving as:

- Investigator in an interventional cancer trial with a minimum of 10 accruals per year
- Holder of a leadership position in NCTN/COG studies; e.g., National PI or Study Chair, U10 grant PI, NCTN Committee Chair), or nationally recognized consortium (current or within preceding three years)
- New investigator within the first five years of appointment as Assistant Professor who has been recruited by the Center to launch a research career in cancer. These are investigators for whom there is a high expectation for a significant role in the cancer mission but who cannot yet show independent extramural funding and/or clinical research leadership. To qualify for membership, these investigators must participate in a formal mentorship program and must be sponsored by the mentor

• A key contributor to the scientific mission of the Cancer Center (e.g., DOT leader, SCCC Shared Resource Director)

If you are interested in being involved in areas pertaining to cancer and/or cancer research but unsure of your eligibility, please complete the application for review. For questions, contact: Stefanie.Johnson@UTSouthwestern.edu.

For more information about the Simmons Comprehensive Cancer Center and its programs, please visit the website: SCCC Website

We show how users begin the application process and complete the majority of the information.

Back | Application: SCCC Membership Application ▶

Complete and submit the application below. The Personal Details section will be populated with information from your user profile where possible. Your entries are automatically saved while working within this site. Should you need to navigate away from the site or close your browser before completing the application, please click 'Save as Draft' below. You will be able to find and resume your application by clicking 'Applications' in the top navigation.

Details ⌄

* indicates required

Application ID: (not yet assigned)

*First Name: Michael

*Last Name: Winemiller

*Degree(s): [   ] [?]

*Employee #: [   ]

*Academic Title: [   ]

*Department/Center: [Select Department/Center]

*Work Address: [   ]

*Office Number: [   ]

*Phone #: [   ]

Because the information required is often specific, we make it easy for the applicant by providing yes, no, and multiple-choice options whenever feasible – as in this example.

*Please select one of the following below and proceed with completing the application.:	Select ▼
*SCIENTIFIC RESEARCH PROGRAM: Please select one Scientific Research Program in which you would like to (or already) participate.:	Select only 1 choice ☐ Cellular Networks in Cancer – Promotes research to increase understanding of molecular mechanisms altered in tumor cells and their microenvironment that support cancer initiation and metastatic progression. ☐ Chemistry and Cancer – Focuses on the discovery of drug-like chemicals that affect biological processes causal to the development and progression of cancer. ☐ Development and Cancer – Brings together investigators in developmental and cancer stem cell biology to discover how aberrant developmental processes contribute to initiation and progression of cancer. ☐ Experimental Therapeutics – Promotes, develops, and exploits mechanism-based research for improved therapy of human cancer, and serves as the main hub for therapeutic clinical trials. ☐ Population Science and Cancer Control – Focuses on cross-cutting themes of cancer health disparities and health services research in the catchment's safety-net systems, recognizing Dallas's great socioeconomic and ethnic diversity.
If Cellular Networks in Cancer, please select an Aim(s) within the Program that best align with your research interest.:	Select up to 3 choices ☐ Define tumor cell-autonomous and intercellular mechanisms of tumorigenesis. ☐ Identify processes that contribute to tumor evolution and metastasis ☐ Foster interdisciplinary interactions to identify interventions that prevent cancer progression in patients
If Chemistry and Cancer, please select an Aim(s) within the Program that best align with your research interest.:	Select up to 3 choices ☐ Identification of Molecular Targets of Novel Anti-Cancer Agents ☐ Biochemical Dissection of Regulatory Pathways Relevant to Human Cancer ☐ Structure-Based Drug Design of Chemicals that Perturb Cancer-Relevant Signaling Pathways

Michael reports that this approach really captures the information necessary to make robust administrative decisions. As an example, there's even a place for uploading a file – which may often be a research narrative to provide supplemental information to the bio sketch. Furthermore, when submitting their application, investigators can copy anyone who may have interest in the submission, such as a department administrator working on their behalf.

Administrative Contact:

Administrative Contact Email:

Upload Files ⌄

*Research Narrative   * indicates required
Please upload a short narrative description of your research/clinical interests related to cancer. Also, indicate how it relates to the above Program selection. Please also include why you would like to join this particular Program?

*File Input: [Choose File] No file chosen

Supplemental Information
Do you have any recruitment start-up, pending cancer related funding or awards? Please attach listing.

If applicable, have you accrued more than 10 patients on a cancer Interventional Clinical Trial within the past 12-month period? Please provide detailed description of trial and accrual data in past 12-month period.

File Input: [Choose File] No file chosen

*NIH Biosketch
Professional Credentials: Please submit your current NIH biosketch with this application.

*File Input: [Choose File] No file chosen

Save or Submit Your Application

Click the Save as Draft button if you would like to return later to complete your application (below left). Click the Submit Application button when you are ready to submit your application (below right).

Add Other Email Addresses for Notifications

Use the form below to have other email addresses included on all communications from the competition system.

Enter recipient(s) email address(es):

Separate email addresses with commas

No-Cost Extension Request Form

Michael states:

Not every research office needs to deal with financial services, but that's a responsibility of ours at the Comprehensive Cancer Center.

Specifically, we take care of commitment funding provided to some of our investigators across campus and we also manage no-cost extension requests of existing awards.

The latter merits a form of its own, shown below:

Request for No Cost Extension (NCE)

Application Tools

Initiate Request

PDF

Details

Administrator(s): Michael Winemiller (Owner)
Katie Nunez

Category: Administrative

Participating Organization(s): Primary Department/Center

Other - Non-UT Southwestern Entities

Award Cycle: Continuous

Number of Applications Allowed Per Applicant: Unlimited

Number of Possible Awardees: Unlimited

Description

Request for No Cost Extension (NCE)

Awardees with current awards from the SCCC may use this form to submit a one-time request for No Cost Extension (NCE) based on the terms of the awarded funds.

All requests for No Cost Extension (NCE) must be well-justified and are subject to leadership approval.

If you have any specific questions, please reach out to SCCC Department Program Manager Michael Winemiller at Michael.winemiller@utsouthwestern.edu

Because no-cost extensions require approval through our cycle here, the individual just clicks on 'initiate request' and it will take them to this section.

Back | Application: Request for No Cost Extension (NCE) ⊙

Complete and submit the application below. The Personal Details section will be populated with information from your user profile where possible. Your entries are automatically saved while working within this site. Should you need to navigate away from the site or close your browser before completing the application, please click 'Save as Draft' below. You will be able to find and resume your application by clicking 'Applications' in the top navigation.

This is your first application for this competition. You may start and submit up to 999.   ✕

Details ⌄

* indicates required

Application ID: (not yet assigned)

*Last Name: Winemiller

*First Name: Michael

*Title of Project: [   ] [?]

*Department/Center: [Select Department/Center]

*Financial Contact: [   ]

*Original Start Date: [   ] 📅

*Original End Date: [   ] 📅

*Current Balance: [   ]

*Requested NEW End Date: [   ] 📅

*Have you previously had an approved NCE?: [Select   ⌄]

Here we're collecting new information, so we ask investigators to give us the original start date and what their balances are, request a new end date, and then provide the reasons for either the delay or the remaining aims.

Approving no-cost extensions is another one of our three- step approval cycles, so it goes to leadership, to our accounting team, and to the award team for final execution of the no-cost extension.

Template: General

Routing Steps: Request for No Cost Extension (NCE) ⊙

The edits you made to this Competition have been saved and are now part of the live Competition. Return to Manage Competition workspace.

Routing Steps determined here will define where applications are sent for review. You can add and edit these after finalizing as well.

☐ No Routing Step(s) required for this Competition.
☐ Disable Accept or Return Application ?

Routing Step 1 - Leadership ›	🗑
Routing Step 2 - Accounting ›	🗑
Routing Step 3 - Award Team Final ›	🗑

Customize Email Notifications

You may choose to edit and customize system email notifications for this competition. Changes to these notifications will apply to this competition only. Begin by selecting an email notification below. After updating the notification, be sure to click "Save". To restore the notification to the system default, click "Restore Default Notification". You may see how your message will appear when delivered by clicking "Preview".

Select an Email Notification: - Select Notification -   ⌄

Words: 0, Characters: 0

RESTORE DEFAULT   PREVIEW   SAVE NOTIFICATION

PREVIOUS   NEXT

Once that's completed, we use custom email notifications to send the appropriate notices and the awards are extended in both our EVAL system and in our InfoReady award file to keep the profile updated.

You can do more with InfoReady.

InfoReady is the all-in-one platform for the selection and approval processes of research offices and higher education institutions.

Convert nearly any form, document, or administrative request into a highly efficient digital process. With user-friendly workflow tools, you can effortlessly define, track, and oversee every step of the process from start to finish. Then easily manage and access all the tasks and requests from anywhere, at any time.

InfoReady is uncomplicated software that brings together the entire process of form building, document collection, routing, review, notification, and reporting into one platform.

Unlike other tools on the market, InfoReady caters specifically to academic and research institutions, providing a unique approach to meet the needs of higher education.

For more information and schedule a demo, please contact

sales@inforeadycorp.com

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