Test Results: *EZGrantFiling* and *The Optimizer*

Presented by

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SPARC

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Bottom Line Up Front

- *EZGrantFiling* and *The Optimizer* successfully met objectives of:
  - ✓ Improved Grant Officer (GO) productivity and customer service
  - ✓ Burden reduction
  - ✓ Risk mitigation
  - ✓ Improved timeliness and accuracy of financial reporting
  - ✓ Ease of use.
- Unexpected insights
  - ✓ Improvements in key processes, such as risk reduction
  - ✓ Reporting reminders ensure timely report submissions

Background

- April 30: *EZGrantFiling* and *The Optimizer* presented to SPARC
- UNCW requested a test
- 90-day test period (June to September)
- 7 UNCW participants
- 45 minute one-on-one set-up and on-site training
- Briefing to stakeholders
- UNCW operating environment (RAMSeS, ImageNow, Banner, U-Shop (SciQuest), Travel)
- Review and feedback covering features, functionality, and user guide
- GTS added *Reg Aide* to *Optimizer* tool (per UNCW input)

Test Results: *EZGrantFiling*

- Burden reduction
  - ✓ Time savings and reduced duplication in organizing and retrieving grant documents (e.g., audit preparation) versus ImageNow
  - ✓ Estimated savings of 0.5 FTE in quarterly SF-425 filings and drawdown (some schools might do more often)
- Risk mitigation
  - ✓ Improved grant record/file completeness, accuracy and integrity
  - ✓ Improved timeliness of reporting thru auto-reminders and easier tracking of agency-specific requirements
  - ✓ Ease of locating and, if needed, sharing grant records

Test Results: *EZGrantFiling* (continued)

- Ease of use
  - ✓ Highly intuitive and user-friendly interfaces and operations
  - ✓ Folder structure enables improved compliance
  - ✓ Easy interface with other systems (e.g., Banner, ImageNow, SciQuest, RAMSeS)
- Process improvement
  - ✓ Identified desirable GO review step in financial reporting prior to submission to government
  - ✓ Expanded search capability to find documents lost thru miss-filing

Test Results: *The Optimizer*

- Burden reduction
  - ✓ Reduced time to search regulations and cost principles
- Risk mitigation
  - ✓ Improved accuracy and consistency in compliance decisions
  - ✓ Rapid reference for validating insights in response to PI queries, reducing risk of regulatory compliance problems
  - ✓ Significant value as training aids
  - ✓ Ease of finding specific OMB and grantor agency regulatory requirements
  - ✓ Facilitates compliance with changing regulations (NSF Policy Guide re-write; OMB A-21 Re-write, DATA Act, etc.)

Test Results: *The Optimizer* *(continued…)*

- Ease of use
  - ✓ Highly intuitive and user-friendly
  - ✓ Easy interface with other systems (e.g., U-Shop (SciQuest))
- Improved customer service and coordination with PIs
  - ✓ Ability to quickly find and share specific regulatory language improves trust in grant administrator guidance
  - ✓ Accelerates purchasing turn-around by providing just-in-time cost guidance

User Feedback

GO perspective (Panda Powell, MJ West, John Finn, Cheryl Nichols)

<u>On EZGrantFiling...</u>

"I like the ease of filing things, very intuitive and logical."

<u>On the Optimizer...</u>

“Five what-ifs took 10 minutes -- it would have taken 30 minutes."

“The GTS tools complement our existing platform nicely and help bring us into the 21st Century.”

Financial systems perspective (Carole Wilson)

<u>On EZGrantFiling ...</u>

Very excited about potential to integrate with Banner.

Costs and Other Issues

EZGrantFiling

- ✓ Priced per grant per year of service depending on volume ($149 to $350 per grant/year)

The Optimizer & *Reg Aide*

- ✓ $2,500 per user per year of service
- ✓ Cost charged to indirect cost pool

GTS Flexibility: "Platinum" relationship discussions underway

- ✓ Significant discounts
- ✓ Commitment to be reference account and provide insights on desired features and functions

Cost and Other Issues (continued...)

Integration with Banner, ImageNow, SciQuest and Existing Systems

- ✓ Testing interfaces with Banner financials (Oracle reports and SSRS)
- ✓ SciQuest data transfer is compatible with EZGrantFiling platform

Key Stakeholders to be Engaged

Finance	Purchasing
Travel	IT
Internal Audit	PIs

Next Steps

- ✓ Decision pending with UNCW
- ✓ Additional UNC campus tests (volunteers?)
- ✓ Consideration of UNC system enterprise contract

Questions??

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