Northwestern Change Request Implementation
Northwestern Strategic Goal

“Improve the organization and alignment of people, processes, policies, and systems to support the core work of our faculty, students, and staff.”
Historical Context

Pre-2012

Paper Forms

2012

Electronic Sponsored Project Requests (ESPR)

2018

Change Requests (InfoEd)
Business Process Review

• Reviewed use of all forms
  – 11 form types, with subtypes 19 total forms
• Revised every form question
• Non-funded agreements
  – CDA, DUA, MTA
• Added new forms
  – F&A waiver, PI eligibility, Clinical Amendment
Requirements: Forms

• 18 forms, most with branching logic
  – Relational link to Proposal record
  – Specific differentiation
  • clinical trials
  • sponsors
Requirements: Routing

- Routing to PI, or department/school, or both
  - Different approval paths
    - Clinical trial designation
    - Change Request record type
Requirements: Workflow

• Assigned to correct OSR staff person or team
  – Outgoing subcontracts → sub process
  – Clinical trials → contracts coordinators
  – F&A waiver/PI eligibility → associate directors
  – Everything else → assigned Grants Officer

• Visible process flow
# InfoEd Change Request Implementation

## Forms and Workflow

### Project Approach

- **Dynamic Collaboration**
  - Business Partners - (OSR) Office for Sponsored Research
  - Vendor – InfoEd
- **Business Process Redesign**
- **Iterative Development**
  - Form review and design

### Benefits

- ESPR Retirement
- Improved User Experience
- Integrated Data
  - WIP - Services based automation