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Electronic  
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# Internet Assisted Review SRA/GTA User Guide

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# Introduction

The Internet Assisted Review (IAR) system is used to manage the process of electronic submission of critiques by reviewers. IAR expedites the scientific review of grant applications by standardizing the current process of critique and initial priority score submissions by reviewers via the Internet. IAR enables reviewers to submit their critiques and view each other's reviews before the actual meeting. As a result, review meetings can contain more informed discussions because reviewers are able to read the evaluations entered by others prior to the review meeting (except where there is a conflict of interest).

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**Note:** After the meeting has occurred, summary statements have been created, and the Council meeting held, data in IAR for that meeting is no longer needed in Commons. All IAR-related data (critiques, preliminary scores, etc.) is purged from the database (this is known as meeting closure). The closure date is six months after the date that the meeting is released in the IMPAC II Peer Review module.

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IAR is accessed through the NIH eRA Commons, a Web-based system that allows principal investigators (PIs) and central research administration offices to communicate and send information electronically.

## Summary of Capabilities

IAR facilitates:

- critique/priority score submission and modification
- streamline voting
- critique combination/merging to create summary statement drafts

IAR provides you with the ability to:

- manage accounts, passwords, and registration for reviewers
- set and modify deadlines for critique submission, end of Read phase, and an optional post-meeting Edit phase
- set meeting-wide options for allowing reviewers to submit unassigned critiques and for displaying reviewer names on the pre-summary statement bodies
- block specific reviewers from accessing critiques from other reviewers
- submit critiques in one of two formats (Word \*.doc or plain text \*.txt) and have them stored centrally
- update submitted critiques before the meeting
- generate a preliminary report of upper and lower scores
- post streamlining votes
- generate a pre-summary statement body containing the critiques for an application formatted to comply with IMPAC II summary statement standards

- use merged critiques (multiple critiques formatted into one document) as the draft summary statement body text and download the merged document to your local computer

## Logging In and Out

### Introduction

IAR is available to any user with a Web browser (Internet Explorer 5.01 or greater or Netscape 4.7 or greater) and Internet access. Other Web browsers are also supported, but some functionality may be lost.

You can successfully log in to IAR using your IMPAC II account username and password. No separate NIH eRA Commons account is required.

### Special Notes Regarding the Web Browser

You must enable Cookies and JavaScript on your browser and use the navigation buttons and hyperlinks provided on the system pages instead of the browser buttons to move through the pages. Additionally, make sure that the browser is *not* set for automatic password completion. For instructions on making these changes, check your browser's Help text.

### Session Expiration

Your IAR session expires after 45 minutes of inactivity. Five minutes before expiration, an expiration message is displayed. Click **Keep Session** to resume your work or **Abandon Session** to force your account to log out.

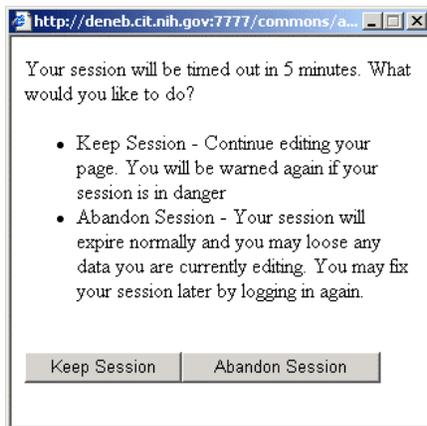


Figure 1 Session Expiration Warning

If you know you won't need to use the system for an extended period of time, you should use the Logout hyperlink located at the top of every page to log out. If your session expires while the NIH eRA Commons is still open (if you don't respond to the expiration message within the allotted five minutes), you will experience errors or lost functionality in the system (such as disappearing buttons, Internal Server Error 500, pages displaying with no data, or prompts to log in again). If any of these problems occur, close your Web browser window and then reopen it to log in and start a new session.

## Logging In to IAR



Figure 2 NIH eRA Commons Home Page Before Logging In

1. Launch your Web browser.
2. Enter the following URL in your browser's Address/Location field:  
<https://commons.era.nih.gov/commons/> and press **Enter**.  
The eRA Commons Home page opens.
3. In the Username field, type your username and press **Tab** to move to the Password field.
4. Type your password and press **Enter** or click **Login**.
5. Click the **IAR** tab to open the IAR List of Meetings page (IAR0001). See *Viewing Meeting Information* on page 4 for more information.

## Concurrent Log Ins

You may be logged in to the NIH eRA Commons for only one session at a time. If you attempt to log in to another session (using a second browser instance), the system gives you the option of either terminating the first session or canceling the request.

## Password Expiration Notification

For security purposes, eRA Commons user passwords expire and must be reset. If your password is about to expire, a "password close to expiration" message is generated when you log in. If you get this notification, you will be directed to select a new password.

## Printing Pages

All Web pages in IAR can be printed using your browser's standard print feature in order to provide a hard copy report of what you see on the screen.

## Logging Out

Logging out of the eRA Commons ends your current session. The top of each page contains a Logout hyperlink.

# Setting Up Meetings

## Setting Up Meetings in Peer Review

In order to allow reviewers to access a meeting and submit critiques in IAR, you must first complete the following functions in the IMPAC II Peer Review module:

- assign reviewers to applications
- organize the meeting
- error check for simultaneous conflicts and assignments

## Viewing Meeting Information

The List of Meetings page provides details (display-only) about all your meetings.

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**Note:** Any SRA or GTA on the meeting roster can see the meeting in IAR.

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1. Log on to IAR as described in *Logging In to IAR* on page 2.

The meeting information on this page is listed in Table 1.

*Table 1 List of Meeting Page Information*

Column	Description
Meeting	Includes the meeting identifier and the meeting title.  The meeting identifier is made up of seven fields: Council Date (in YYYY/MM format), IRG (SRG) Code, IRG (SRG) Flex Code, SRA Designator Code, SRA Flex Code, Group Code, Group Extension Code, and the Workgroup Number. An example of an SRG Meeting is 2002/10 PC-1 (01) An example of a SEP Meeting is 2002/10 ZRG1 SRG-F (GC) X 001  The title indicates the title of the meeting or the panel name if the meeting is a SEP. If the meeting is a telephone conference, "Teleconference" is indicated next to the meeting title information.
Meeting Dates/Location	The dates that the actual meeting starts and ends and the hotel name, city, and state where the meeting is being held.
SRA Name	The first and last names, the work telephone number, and the work email address of the SRA. The latter is in the form of a hyperlink so that an email can be sent to the SRA.
Phase	The current <a href="#">IAR phase</a> for the meeting.
Critique Due	The date and time critiques are due. This is also known as the submit phase end date.

Read Phase End	The Read phase end date and time.
Edit Phase End	The Edit phase end date and time.
Action	Area that provides hyperlinks to open the Control Center and the List of Applications page.

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## Managing Control Center Information

### Introduction

After you set up meeting information in Peer Review, access the IAR Control Center to manage your meetings and reviewers. The Control Center displays each reviewer's name, email address, IAR user name, and indicators for the following: account active, in roster, enabled, blocked, etc.

Use the Control Center to

- enable the meeting by setting dates for the different IAR phases.
- enable reviewers to use IAR to submit their critiques.
- block or unblock reviewers from reading critiques before they have submitted their own.
- set meeting-wide options for unassigned critiques.

1. Log in to IAR as described in *Logging In to IAR* on page 2.
2. Select the **View Control Center** hyperlink for the desired meeting. The Control Center page (IAR0002) opens for the selected meeting.

### Viewing Control Center Information

The Control Center page is divided into three sections:

- **Checked Reviewer(s) Options.** See *Enabling/Disabling Reviewers* on page 7 and *Blocking/Unblocking Reviewers from Reading Critiques* on page 7 for more information about the various options in this section.
- **IAR Related Dates/Times.** See *Setting IAR Phase* on page 6 for more information.
- **Reviewers in the Meeting.** The columns in this section are described in Table 2.

Table 2 Reviewers in the Meeting Section Information

Column	Description
Select All/None	Check box to select or clear reviewers for an action. The check box in the column heading lets you select/clear all reviewers at once.  <b>Note:</b> A check box is provided only for reviewers who have been added to the meeting roster and who have a MLG-type email address listed in their person profile information.
Reviewer Name	Last name, first name of the reviewer. A (T) next to the name indicates that the reviewer is a telephone reviewer.
Email	The email address of the reviewer. The address is in the form of a hyperlink so that an email can be sent to the reviewer.  When a reviewer email address is missing, a customized message is displayed depending on whether or not the reviewer has an existing NIH eRA Commons account. If the reviewer has an active account, the message reads "Rev. Update in Commons" indicating that only the reviewer (and not the SRA) can update the MLG address. If the

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Column	Description
	reviewer doesn't have an existing account the message reads "SRA Update MLG."
User Name	The reviewer user name as listed in the eRA Commons.
Active Account	This column indicates (Y/N) if the eRA Commons account of the Reviewer is active or not.
In Roster	This column indicates (Y/N) if the reviewer is listed in the meeting's roster.
E	This column indicates (Y/N) if the reviewer is enabled to use IAR for this meeting.
B	This column indicates (Y/N) if the reviewer is blocked from reading other critiques if (s)he did not submit their own.
T	This column indicates (Y/N) if a telephone reviewer is allowed to view all critiques (as opposed to only the reviewer's own assignments).

## Setting IAR Phase Dates

Before reviewers can be enabled to use IAR, you must set the start and end dates for the Submit and Read phases (and the optional Edit phase) in the IAR Control Center.

The following phases are available in IAR:

- Submit phase—Time period when reviewers submit critiques for their assigned applications. During this phase reviewers only see their assigned applications. The phase end date is the Critique due date.

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**Note:** For the pilot release of IAR, reviewers are allowed to submit unassigned critiques and will therefore see all applications.

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- Read phase—Time period after the Submit phase (the Submit phase end date determines the start of the Read Phase). During the Read phase, except where in conflict or blocked, reviewers see all applications and may read all critiques. At the end of the Read phase, the actual meeting is usually held.
- Edit phase—You determine whether or not to hold the optional Edit Phase which follows the Read phase. In this phase, reviewers correct/resubmit their critiques based on comments in the meeting or can post critiques for unassigned applications. At the end of the phase, the meeting in IAR goes back to Read Phase until assignments are manually purged or the Assignment Purge date is reached (the purge date is set automatically for 15 days after the meeting release date). After assignments are purged, reviewers lose access to the meeting. You continue to have access for the purpose of preparing summary statements and reading critiques until the meeting is closed to IAR (the closure date is set automatically for six months after the meeting release date). If an Edit phase end date is not set, there is no Edit Phase.
- SS Prep phase—When summary statements are being prepared at the end of the Read phase (or at the end of the optional Edit phase) SS Prep will be listed as the current phase to indicate that you are preparing the summary statements. This phase is not visible to reviewers. When the meeting is in this phase, for the reviewer it is listed as being in the Read phase.

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**Note:**

All dates must be in the proper date/time format: MM/DD/YYYY HH:MM AM. However, you can enter a single digit for hour, month, and day in the phase dates. For example, the date 6/5/2003 1:00 AM can be entered instead of 06/05/2003 01:00 AM.

Dates must be in sequential order based on the phases: The Read phase end date must be later than the Submit phase end date and the Edit phase end date (if entered) must be later than the Read phase end date.

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1. Access the Control Center for the desired meeting as described in *Managing Control Center Information* on page 5.
2. In the IAR Related Dates/Times section, click the **Edit** hyperlink to open the Edit IAR Phases and Options page (IAR0006). All end dates that are already set for the Submit, Read, and Edit phases are listed in the corresponding fields.
3. Enter the dates and times for the desired phases. If desired, a drop-down calendar is available to select a date (dates can still be entered manually).
4. Click **Submit** to view the information that you entered. Click **Continue** to confirm the submission.

## Enabling/Disabling Reviewers

Use the Control Center to enable reviewers to use IAR. Enabled reviewers receive a registration notification by email which provides full information about registering and/or logging on to IAR. By default, enabled reviewers are blocked from reading critiques on applications where they did not submit their own critique. The defaults for this option can be changed via the Control Center (see *Blocking/Unblocking Reviewers from Reading Critiques* on page 7 for more information). Disabling reviewers removes their access to the specified meeting.

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**Note:** Reviewers in the meeting must be on the Committee Management Meeting Roster before they can be enabled for IAR.

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1. Access the Control Center for the desired meeting as described in *Managing Control Center Information* on page 5. The **E** column indicates (Y/N) if the reviewer is enabled (additional reviewer information listed in the Reviewers in the Meeting section is described in Table 2 on page 5).
2. Verify that IAR phase dates are already set (reviewers cannot be enabled to use IAR before the Read and Submit phase end dates are set). See *Setting IAR Phase Dates* on page 6 for more information.
3. To enable reviewers to use IAR:
  - a. Select the check box next to the desired reviewer(s).
  - b. Click the **(E) Enable for this meeting...** hyperlink. The Control Center—Enable Reviewers for IAR Validation page (IAR0003) opens.
  - c. Click **Submit** to confirm the request. IAR sends an email registration invitation to reviewers without active accounts and sends an email with a user name and link to the eRA Commons home page to reviewers with accounts.
4. To disable reviewers from using IAR:
  - a. Select the check box next to the desired reviewer(s).
  - b. Click the **Disable, revoke reviewer access...** hyperlink. The Control Center –Disable Reviewers for IAR Validation page (IAR0003) opens.
  - c. Click **Submit** to confirm the request. IAR removes the reviewer’s access to the meeting.
5. Click the **Back to Control Center** hyperlink to return to the IAR Control Center.

## Blocking/Unblocking Reviewers from Reading Critiques

Reviewers generally submit critiques for their assigned applications during the Submit phase. If a reviewer misses the due date and fails to submit a critique during this phase, by default the reviewer is blocked and cannot read other critiques until they submit their own. Once the critique is submitted, the system automatically unblocks the reviewer from reading on that application. Use the Control Center to change this default setting in IAR and unblock either selected or all reviewers and/or block them again.

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**Note:** Reviewers must be enabled before they can be blocked or unblocked. See *Enabling/Disabling Reviewers* for more information about enabling reviewers.

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1. Access the Control Center for the desired meeting as described in *Managing Control Center Information* on page 5. The **B** column indicates (Y/N) if the reviewer is blocked (additional reviewer information listed in the Reviewers in the Meeting section is described in Table 2 on page 5).
2. To unblock reviewers and allow them to read other critiques before they have submitted their own:

- a. Select the check box next to the desired reviewer(s).
  - b. Click the **(B) Block from reading other critiques...** hyperlink. The Control Center—Block Reviewers from Reading Critiques page (IAR0005) opens.
  - c. Click **Submit** to confirm the request.
3. To block reviewers from reading other critiques if they have not yet submitted their own:
    - a. Select the check box next to the desired reviewer(s).
    - b. Click the **(B) Unblock from reading other critiques...** hyperlink. The Control Center—Unblock Reviewers from Reading Critiques page (IAR0005) opens.
    - c. Click **Submit** to confirm the request.
  4. Click the **Back to Control Center** hyperlink to return to the IAR Control Center.

## Setting Meeting-wide Options for Unassigned Critiques

Use the Control Center to set the meeting-wide option of allowing or not allowing submissions of unassigned critiques during either the Submit or Edit phase. The default values are that unassigned critiques can be submitted in both phases.

1. Access the Control Center for the desired meeting as described in *Managing Control Center Information* on page 5.
2. In the IAR Related Dates/Times section, click the **Edit** hyperlink to open the Edit IAR Phases and Options page (IAR0006).
3. Set the options for allowing reviewers to submit unassigned critiques.
4. Click **Submit** to view the information that you entered. Click **Continue** to confirm the submission.

## Viewing Application Information

The List of Applications page lets you view information about the applications in a meeting and provides access to actions such as submitting and viewing critiques. The data viewed on the List of Applications page is customized based on both the user (SRA/GTA or reviewer type) and the current IAR phase.

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**Note:** The grant application number appears as a hyperlink for viewing grant images of the actual applications. This hyperlink is always available unless the reviewer is in CD Conflict with the application

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1. Log in to IAR as described in *Logging In to IAR* on page 2.
2. From either the Control Center page or the List of Meetings page, click the **View List of Applications** hyperlink (in the Action column) for the desired meeting. The List of Applications page (IAR0007) opens for the selected meeting. By default, the applications are listed in order of application number.

## List of Applications Page—Meeting Information

Meeting information, listed in Table 3, is displayed on the top of the List of Applications page and is the same for any of the [IAR phases](#).

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**Note:** All times are listed according to Eastern Standard/Daylight Savings Time.

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Table 3 List of Applications Page—Meeting Information

Column	Description
Meeting Title	The title of the meeting or the panel name if the meeting is a SEP.
Meeting Identifier	The meeting identifier is made up of seven fields: Council Date (in YYYY/MM format), IRG (SRG) Code, IRG (SRG) Flex Code, SRA Designator Code, SRA Flex Code, Group Code, Group Extension Code, and the Workgroup Number.

	An example of an SRG Meeting is 2002/10 PC-1 (01) An example of a SEP Meeting is 2002/10 ZRG1 SRG-F (GC) X 001
Meeting Phase	The current IAR phase for the meeting; Submit, Read, Edit, or SS Prep.
Meeting Dates	The dates that the actual meeting starts and ends.
Critiques Due	The date and time critiques are due. This is also known as the Submit phase end date.

## List of Applications Page—Link Information

The various links on the List of Applications page (located directly below the meeting information) provide ways to navigate in IAR and various ways to view the application information. These links are described in Table 4.

Table 4 List of Applications Page—Link Information

Link	Description
Back to List of Meetings	Returns you to the List of Meetings page. Use this link instead of using the browser's Back button.
View List by Reviewer	Lists the applications in ascending alphabetical order by reviewer last name.
View List by Application	This is the default view when you open the List of Applications page and lists the applications by application number.
View All Meeting Critiques	Opens Adobe Acrobat with a PDF file of all critiques for all applications in a meeting.
View Score Matrix	Shows the score matrix for applications in the meeting. See on page 20 for more information.

## List of Applications Page—Application Information

By default, application information is sorted by last name of the PI with a secondary sort by application number (Activity Code/IC/Serial Number). Table 5 describes the column headings for the application information.

Table 5 List of Applications Page—Application Information

Column	Description
Application	Lists the full application number. This column also provides a link to view all critiques. During the Submit phase, only a PDF link is available. If the Submit phase end date has passed, a link to a Microsoft Word format pre-summary statement body is listed (if a summary statement exists for the application).
PI Name	Lists the last name, first name of the principal investigator.
New PI	Indicates (Y/N) if the application is from a new investigator.
Title	Lists the project title of the grant application.
Reviewer (Role)	Lists the last name, first name of the reviewer and indicates the reviewer's role (primary, secondary, etc.).
Score	The preliminary score for the application. If available, an average score for each application is listed.
Submitted Date	If a critique has been submitted, indicates the date and time that the critique was submitted.

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	<b>Note:</b> All times are listed according to Eastern Standard/Daylight Savings Time.
Action	Lists the various options available for the specific application (Submit, View, Delete)

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# Critiques

You can submit critiques and scores for assigned reviewers during all IAR phases. Critiques cannot be submitted for unassigned applications.

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**Note:**

Only critiques uploaded in Microsoft Word format (with a \*.doc extension) or in plain text format (with a \*.txt extension) can be submitted.

Critiques cannot be edited online and must be resubmitted if you want to make changes to a previously submitted critique. Critiques cannot be resubmitted during the Read phase.

The WP Greek font family is not supported during the conversion of uploaded critiques to Adobe PDF. In order to include Greek characters (for example,  $\alpha$  or  $\beta$ ) insert them as symbols within the Microsoft Word document.

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1. Log in to IAR as described in *Logging In to IAR* on page 2.
2. From the Control Center page or the List of Meetings page, click the **View List of Applications** hyperlink (in the Action column) to open up the List of Applications page (IAR0007).
3. Click the **Submit** hyperlink in the Action column for the desired application to open the Submit Critique and Preliminary Score page (IAR0011).
4. Enter the full path and filename (including extension) of the critique or click **Browse** button to locate the file.
5. If applicable, either a numeric score or a score code can be entered (see Table 6 for more information about the score code). A numeric score must be within a range of 1.0–5.0.
6. Click **Submit** to upload the file. The file is checked for the proper file type and is virus-checked.
7. IAR displays a validation message with an option to cancel or submit critique and score. Click **Submit** to finalize the submission and view a confirmation message that your critique and score were updated.

## Special Considerations for Review Criteria

The following special considerations are part of the review criteria and need to be assessed by the assigned reviewers:

- protection of human subjects from research risks
- data and safety monitoring
- inclusion of women
- inclusion of minorities
- inclusion of children
- animal welfare
- biohazards

## Submit Critique and Preliminary Score Page Information

Table 6 describes the information included on the Submit Critique and Preliminary Score page.

Table 6 Submit Critique and Preliminary Score Page Information

Field	Description
Application	A display-only field that lists the application number (activity code/IC/serial)
Title	A display-only field that lists the project title of the grant application.
PI Name	A display-only field that lists the last name, first name of the principal investigator.
Assignment Role	A display-only field that lists the reviewer's role (primary, secondary, etc.).
Critique File	Enter the full path and filename of the critique file on your computer.
Score	Enter either the numeric score (from 1.0–5.0) or a score code of NR (not recommended), UN/NC (unscored/not competitive), or DF (deferred). Only one option is permitted.

## Viewing Critiques

View critiques during any [IAR phase](#). When there is more than one critique to display, the critiques are merged into one file with each critique printed on a new page. You can view critiques in several ways:

- individual critiques
- all critiques for all applications in a specific meeting, sorted either by PI or by application number
- all critiques for a specific application
- all critiques submitted by a specific reviewer

1. Log in to IAR as described in *Logging In to IAR* on page 2.
2. From the Control Center page or the List of Meetings page, click the **View List of Applications** hyperlink in the Action column to open up the List of Applications page (IAR0007).

Sort options include sorts by IC/Serial or Act/IC/Serial. These options appear as hyperlinks in the Application column heading which resort the list when clicked. These options appear for both reviewers and SRA/GTAs but do not appear when the List of Applications page is in "View by Reviewer" mode. The IC/Serial sort sorts by the IC and then by application serial number. The Act/IC/Serial sort first sorts by Activity code, then by IC, and then by application serial number.

3. To view an individual critique:
  - Click the **View** hyperlink in the Action column for the desired application. The critique is usually available in Adobe Acrobat PDF, but may be displayed in the original Word/text format if the conversion hasn't yet occurred.
4. To view critiques for all applications in a meeting:
  - Select either the **By Appl** or the **By PI** hyperlink located in the View All Meeting Critiques section. An Adobe PDF document of all critiques for all applications is created. When By Appl is selected, the critiques are listed in order of application number with a secondary sort on the reviewer assignment role. When By PI is selected, the critiques are listed in alphabetical order by PI last name. The By PI option is only available for SRA/GTAs.
5. To view all critiques submitted for a specific application:
  - a. If not already selected, click the **View List by Application** hyperlink located below the meeting information at the top of the page.

- b. Click the **View All Critiques** hyperlink in the Application column for the desired application. An Adobe PDF document of all critiques for the application is created. The critiques are listed in order of reviewer assignment role.
6. To view all critiques submitted by a specific reviewer:
    - a. If not already selected, click the **View List by Reviewer** hyperlink located below the meeting information at the top of the page. The list is sorted by the reviewers last name (with a secondary sort by reviewer assignment role and a tertiary sort by the PI last name). Additional sort options are:
      - PI Name—sorts in descending alphabetical order (A–Z)
      - Role—sorts by order of importance (Primary, Secondary, Tertiary, Discussant, etc.)
      - Submitted Date—Sorts by most recent date at the top of the list to least recent date (records without a date are listed at the end of the list sorted by PI name in descending alphabetical order)
    - b. Click the **View All** hyperlink that appears in the Reviewer column for the desired reviewer. If there are multiple critiques to view, the critiques are merged into one Adobe PDF document file with each critique printed on a new page. The critiques are listed in order of reviewer assignment role.

# Streamlining

Streamlining is the practice of identifying applications with low scores (scores in the lower half). Applications identified as lower half require little if any discussion at the review meeting and are coded as Unscored after the meeting. Identifying these applications prior to the meeting helps streamline discussions at the meeting.

Use the Score Matrix page during the Submit and Read phases to designate which applications should be categorized as lower half. The Score Matrix is available in two views—Show All Applications (the default view) and Show Lower Half Applications Only.

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**Note:** Subprojects are sorted under the parent application (the applications are grouped by the parent PI name). The subproject itself lists the Core Leader name and not the parent PI name.

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## Viewing the Score Matrix Page

1. Log in to IAR as described in *Logging In to IAR* on page 2.
2. From the Control Center page or the List of Meetings page, click the **View List of Applications** hyperlink in the Action column to open up the List of Applications page (IAR0007).
3. Click the **View Score Matrix** hyperlink located below the meeting information at the top of the page. The View Score Matrix page (IAR0008) opens. By default, all applications are listed and sorted PI name.
4. To view lower half applications only:
  - Click the **Show Lower Half Applications Only** hyperlink.

Table 7 describes the information included on the View Score Matrix page.

Table 7 Score Matrix Page Information

Column	Description
Application Number	Lists the application number (activity code/IC/serial). This column can be sorted by either activity/IC/serial number or by IC/serial number.
PI Name [Conflicts]	Lists the PI last name, first name with an indication if the PI has at least one conflict of interest. This column can be sorted by activity/PI name or by PI name.
Lower Half	Indicates (by an X) if the application is marked for inclusion into the lower half. The column can be sorted either by: <ul style="list-style-type: none"> <li>• <b>LH/ACT/PI/AVG</b> (lower half/activity code/PI name/average)—lists applications without lower half designation and without an average score first, then the lower half applications, then average score in descending order.</li> <li>• <b>LH/PI/AVG</b> (lower half/PI name/average)—lists applications without lower half designation and without an average score first, then the lower half applications, then average score in</li> </ul>

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	descending order.
AVG	Lists the average score for applications that are scored with numeric scores only. The column can be sorted by applications with no average and no lower half designation first, then the average score in ascending order, and then all applications designated as lower half.
Scores	Lists the individual preliminary scores submitted for the applications.

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## Designating Lower Half Applications

1. Open the View Score Matrix page as described in *Viewing the Score Matrix Page* on page 14.
2. To designate applications as lower half:
  - a. Click the **Designate Lower Half Applications** hyperlink to open the Edit Score Matrix page (IAR0009). Applications with marked check boxes in the Lower Half column are already designated as lower half.
  - b. In the Lower Half column, select the check box for the desired applications.
  - c. If required, clear the check box for applications that should no longer be designated lower half.
3. Click **Submit** to save changes and view the updated page.
4. Click the **Back to List of Applications** hyperlink to return to the List of Applications page.

# Summary Statements

After the Submit phase ends, IAR creates a file of merged critiques for each application in the meeting (this file is the pre-summary statement body and is in Microsoft Word format) which can be downloaded and saved locally. This document is a final goal of IAR and represents the starting point of the summary statement for SRA/GTAs. You can modify the file as needed and then import it into the Prepare Summary Statement screen in the IMPAC II Peer Review module.

## Summary Statement Assembly

Critiques are merged in order of assignment priority (Primary, Secondary, Tertiary, Reader, Discussant, Unassigned) with one blank line between critiques. Critiques for subprojects are included in the parent grant pre-summary statement. Subprojects are sorted according the same order specified in the Order of Review in the IMPAC II Peer Review module.

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**Note:** You will need to renumber your Order of Review in the IMPAC II Peer Review module before the pre-summary statement bodies are created in IAR.

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## Viewing Pre-Summary Statement Bodies

Pre-summary statement bodies are available after the Submit phase is ended.

1. Log in to IAR as described in *Logging In to IAR* on page 2.
2. From the Control Center page or the List of Meetings page, click the **View List of Applications** hyperlink in the Action column to open up the List of Applications page (IAR0007).
3. In the Application column of the desired application, click the **Word** hyperlink to open a File Download window where you can either open the Microsoft Word file from its current location or save the file to your computer.
4. To download a zipped file of all pre-summary statement bodies, click the **Download Zip of all Pre-SS** hyperlink to open a File Download window where you can either open the zip file from its current location or save the file to your computer.

## Including Reviewer Names in the Preliminary Summary Statement Body

Use the Control Center to set a meeting-wide option to include reviewer names in the preliminary summary statement body. The default setting for this feature is "No."

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**Note:** If this setting is changed after the Submit phase is over, all pre-summary statement bodies will be deleted and rebuilt.

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1. Access the Control Center for the desired meeting as described in *Managing Control Center Information* on page 5.

2. In the IAR Related Dates/Times section, click the **Edit** hyperlink to open the Edit IAR Phases and Options page (IAR0006).
3. Set the options for including reviewer names in the preliminary summary statement bodies.
4. Click **Submit** to view the information that you entered. Click **Continue** to confirm the submission.

# Reviewer Information

Use this information in this section, written for reviewers, to help your reviewers use IAR.

## Creating/Accessing an IAR Account

Your SRA/GTA grants you access to use IAR to submit and view critiques for applications in meetings. When this happens, you receive an email informing you of your ability to access IAR. If you do not yet have an IAR account, the email directs you to create a new IAR account. If you already have an IAR account, you are directed to access the eRA Commons Login page.

To create a new account:

1. Click the hyperlink in the email to open the eRA Commons and the Create New Account page.
2. In the account form, enter the requested information noting the following:
  - If a field name is followed by an asterisk (\*), it is a required field.
  - The username has a 6 character minimum and a 20 character maximum.
  - Passwords must contain a minimum of six characters. For additional protection, include a combination of letters and numbers.
3. Click **Submit** to enter the information. After your account information has been reviewed and authorized, you will receive a notification email containing the URL to the eRA Commons Login page.

To access IAR if you already have an IAR account or once you receive the notification email:

1. Click the hyperlink in the email to open the eRA Commons Login page.
2. Log in as described in *Logging In to IAR* on page 2.

## Viewing Meeting Information

The List of Meetings page shows all the meetings where you have assignments and the meeting is in the Read, Submit, or Edit Phase. This is a display-only page; none of the information can be edited.

➤ Log in as described in *Logging In to IAR* on page 2.

The information on the List of Meetings page is listed in Table 1 on page 4 and is the same for both reviewers and SRAs/GTAs.

## Viewing Application Information

The List of Applications page lets you view information about the applications in your meeting and provides access to actions such as submitting and viewing critiques. The data viewed on the List of Applications page is customized based on the current IAR phase and the type of reviewer you are. By default, the page initially shows only applications assigned to you but it provides access to show all applications in the meeting if your SRA/GTA has opened the meeting for unassigned critiques or comments to be posted.

**Note:** The grant application number appears as a hyperlink for viewing grant images of the actual applications. This hyperlink is always available unless you are in CD Conflict with the application

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- From the List of Meetings page, click the **View List of Applications** hyperlink (in the Action column) to open up the List of Applications page (IAR0007) with your assigned applications.

When the meeting is in the Submit phase:

- Each application has a link for submitting a critique. If you have already submitted a critique, there are also links for deleting and viewing the critique.

When the meeting is in the Read phase:

- Based on the whether or not you have been permitted by your SRA/GTA to view the critiques of other reviewers, the list of available applications with either list only assigned applications or will list all reviewed applications.
- If you have not yet submitted a critique on an application and are blocked from reading the critiques of other reviewers, only the Submit option will be available for blocked applications.
- The other applications will each have a link for viewing critiques.
- If you are a telephone reviewer, you can read critiques for all meeting applications.

When the meeting is in the Edit phase:

- Each application has a link for submitting a critique. If you have already submitted a critique, there are also links for deleting and viewing the critique.
- If you have not yet submitted a critique on an application and are blocked from reading the critiques of other reviewers, only the Submit option will be available for blocked applications.
- If you are a telephone reviewer, you can see all meeting applications and are able to view critiques submitted by other reviewers.

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**Note:**

Mail reviewers can only see their own assigned applications.

By default, you are blocked from reading application critiques submitted by other reviewers before you submit your own critique. These defaults may be changed for selected reviewers by the SRA/GTA.

Applications with conflicts are marked COI and have no links available for submitting, deleting, or viewing a critique.

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## List of Applications Page—Meeting Information

Meeting information, listed in Table 3 on page 8, is the same for both reviewers and SRAs/GTAs.

## List of Applications Page—Link Information

The links at the top of the application list table provide ways to navigate in IAR and various ways to view the application information. The links are described in Table 8.

Table 8 List of Applications Page—Link Information

Link	Description	Viewed in IAR Phase
Back to List of Meetings	Returns you to the List of Meetings page. Use this link instead of using the browser's Back button.	All
Show All Applications	Shows all applications for the meeting, including those with conflicts.	All

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Show Assigned Applications	Shows all the applications that are assigned to you. This is the default view when you first access the List of Applications page.	Submit
View My Critiques	Opens Adobe Acrobat with a PDF file of all critiques that you have submitted so far.	All
List My Assignments Only	Shows the applications that have been assigned to you.	Read, Edit
View Score Matrix	Shows the score matrix for applications in the meeting. See <i>Viewing the Score Matrix</i> on page 20 for more information.	Read
View All Meeting Critiques	Opens Adobe Acrobat with a PDF file of all critiques for all applications in a meeting.	Read, Edit
View all Critiques for Assigned Applications	Opens Adobe Acrobat with a PDF file of all critiques you have submitted for your assigned applications in a meeting.	Read, Edit
View All Critiques	Opens Adobe Acrobat with a PDF file of all critiques submitted for a specific application in a meeting.	Read, Edit

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## List of Applications Page—Application Information

Application information, listed in Table 5 on page 9, is the same for both reviewers and SRAs/GTAs.

### Viewing SRA/GTA Contact Information

Contact information is provided as a convenient way to contact your SRA/GTA for discussing issues that may arise. (for example, when there are assignment discrepancies or conflicts of interest with an application viewed in IAR).

1. Click the SRA/GTA hyperlink located at the bottom of the List of Applications page to open the SRA/GTA Name and Contact Information page (IAR0010). The page displays SRA/GTA name, telephone number and email address.
2. The email address is in the form of a hyperlink so that an email can be sent to the SRA/GTA. Click the hyperlink to open your default email program.

## Submitting Critiques/Scores

You can submit critiques and scores for your assigned applications during the Submit and Edit phases. During the Read phase, only reviewers who have missed the due date may submit late critiques. Submission information is the same for both reviewers and SRAs/GTAs.

See *Special Considerations for Review Criteria* on page 11 and *Submit Critique and Preliminary Score Page Information* on page 12 for more information.

## Viewing Critiques

Your ability to view critiques depends upon the type of reviewer that you are and the current IAR phase that the meeting is in. Critiques cannot be modified during the Read Phase and you will not be able to view critiques and scores for applications where you have conflicts of interest. When there is more than one critique to display, the critiques are merged into one file with each critique printed on a new page.

Regular reviewers—During the Read phase, you can usually view critiques posted by other reviewers to help you prepare for review meeting discussions. However, if you have not submitted your critique during the Submit phase,

your SRA/GTA can block you from reading other critiques until you have submitted your own. If you are blocked from reading, you must submit your critique before you will be able to read other critiques.

Telephone reviewers—You are allowed to view critiques and scores for all meeting applications (except for applications where there is a conflict of interest).

Mail reviewers—You will not be able to view critiques that are submitted by other reviewers.

During the Submit phase, you can view critiques you have submitted from the List of Applications page, either one at a time or merged into one file.

During the Read Phase, you can view critiques in several ways:

- all critiques for all applications in a specific meeting
- all of your own critiques for a specific meeting
- all critiques for your assigned applications
- all critiques for one application merged into one file

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**Note:** Subprojects are treated like all other applications. For example, if you are assigned to two subprojects and don't submit a critique on time for one of them, if the SRA/GTA blocks you from viewing other critiques you only will be blocked from viewing critiques for the specific subproject that doesn't yet have a critique submitted.

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1. From the List of Meetings page, click the **View List of Applications** hyperlink (in the Action column) to open up the List of Applications page (IAR0007).
2. To view an individual critique (during all IAR phases):
  - Click the **View** hyperlink in the Action column for the desired application. The critique is usually viewed in Adobe PDF, but may be displayed in the original Word/text format if the conversion hasn't yet occurred.
3. To view critiques for all applications in a meeting (during the IAR Read/Edit phases only):
  - Click the **View All Meeting Critiques** hyperlink. An Adobe PDF document of all critiques for all applications is created. The critiques are listed in order of application number with a secondary sort on the reviewer assignment role. Critiques for applications where there are conflicts of interest are omitted from the document.
4. To view all critiques that you have submitted (during all IAR phases):
  - Click the **View My Critiques** hyperlink. An Adobe PDF document of all your critiques is created.
5. To view all critiques that you have submitted for your assigned applications (during the IAR Read/Edit phases only):
  - Click the **View All Critiques for Assigned Applications** hyperlink. An Adobe PDF document of all your critiques is created.
6. To view all critiques submitted for a specific application (during the IAR Read/Edit phases only):
  - Click the **View All Critiques** hyperlink that appears under the Application column for the desired application. An Adobe PDF document of all critiques for the application is created. The critiques are listed in order of reviewer assignment role.

## Viewing the Score Matrix

The Score Matrix page is used by the SRA/GTA during the Submit and Read phases to designate which applications should be categorized as lower half. Your ability to view the Score Matrix page depends upon the type of reviewer that you are and the current IAR phase that the meeting is in. The Score Matrix is available in two views—Show All Applications (the default view) and Show Lower Half Applications Only.

Regular reviewers—The score matrix page is available (display-only) during the Read phase, but only for applications where there is no conflict of interest. If you are blocked by your SRA/GTA from reading critiques for applications where you haven't yet submitted a critique, you are also blocked from seeing scores for those

applications. Note that if a blocked reviewer submits a critique for one subproject but not others, the Score Matrix page only displays scores for the applications where the reviewer has submitted critiques.

Telephone reviewers—You can see only your own assignments in the Score Matrix page.

Mail reviewers—You do not have access to the Score Matrix page at all.

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**Note:** Subprojects are sorted under the parent application (the applications are grouped by the parent PI name). The subproject itself lists the Core Leader name and not the parent PI name.

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See *Viewing the Score Matrix Page* on page 14 for information about accessing the Score Matrix page.

Score Matrix page information is the same for both reviewers and SRAs/GTAs and is listed in Table 7 on page 14.