National Institutes of Health/Office of Extramural Research

Electronic Research Administration

Internet Assisted Review SRA/GTA Users Guide

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Introduction

Overview

The eRA Internet-Assisted Review (IAR) system is a Web-based system 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 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).

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. The closure date is six months after the date that the meeting is released in the IMPAC II Peer Review module.

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

Using the IAR Module

IAR facilitates:

- distribution of the grant application, prior summary statements, and appendices electronically to reviewers
- critique/priority score submission and modification
- streamline voting
- critique combination/merging to create summary statement drafts

IAR provides SRAs/GTAs with the ability to:

- initiate 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
- post meeting materials (files and links to other web sites) for reviewers

Logging On To IAR

To log on to IAR, access IAR via the NIH eRA Commons. To access the NIH eRA Commons you must be registered as a user of the IMPAC II System and have SRA or GTA roles assigned to you.

Any registered user with a Web browser (Internet Explorer 5.01 or greater or Netscape 4.7 or greater) and Internet access can log on to the application. Other Web browsers are also supported, but some functionality may be lost.

To log on to IAR:

1. Open your web browser.
2. In the Address/Location field of your web browser, type **https://commons.era.nih.gov/commons/** and then press Enter. The eRA Commons Login Page appears (Figure 1).

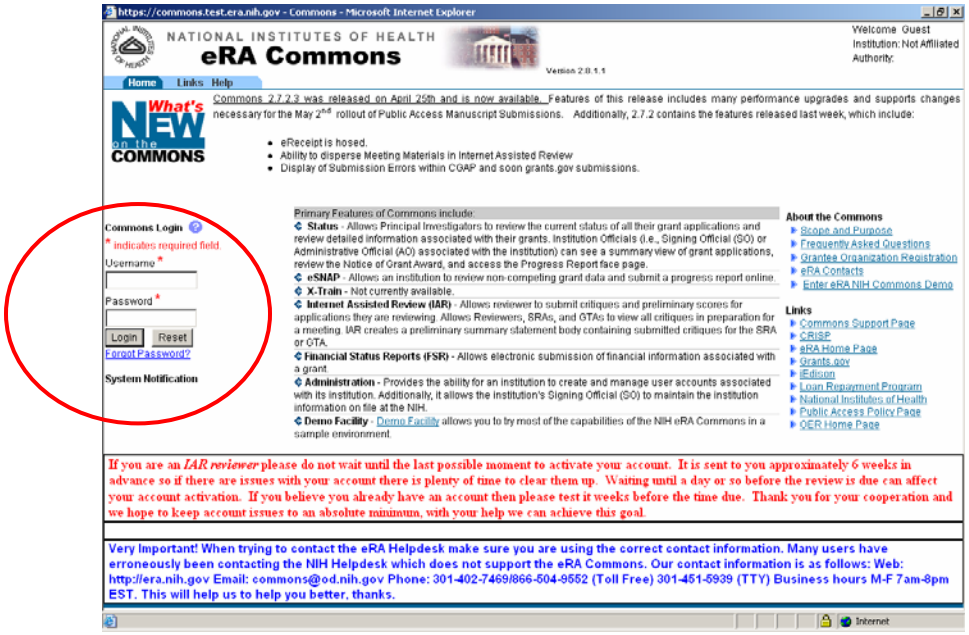


Figure 1: eRA Commons Login Page

3. In the **Username** field, type your IMPAC II username.

4. In the **Password** field, type your IMPAC II password.

5. Click **Login** (or press **Enter**). The eRA Commons Home page appears.

NOTE: You can only access eRA Commons for 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.

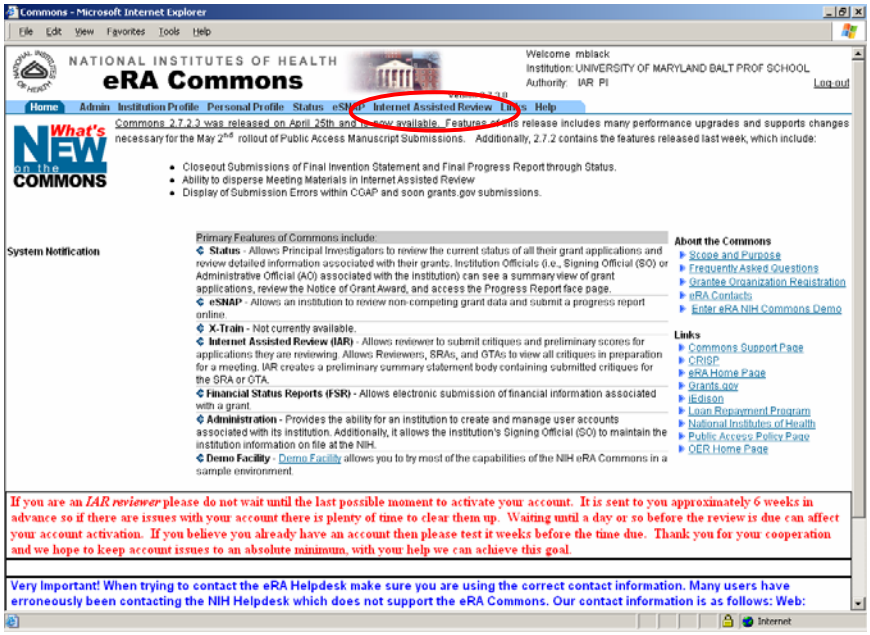


Figure 2: Internet Assisted Review Access Tab

6. Select the **Internet Assisted Review** access tab. The IAR **List of Meetings** page (IAR0001) appears (Figure 3).

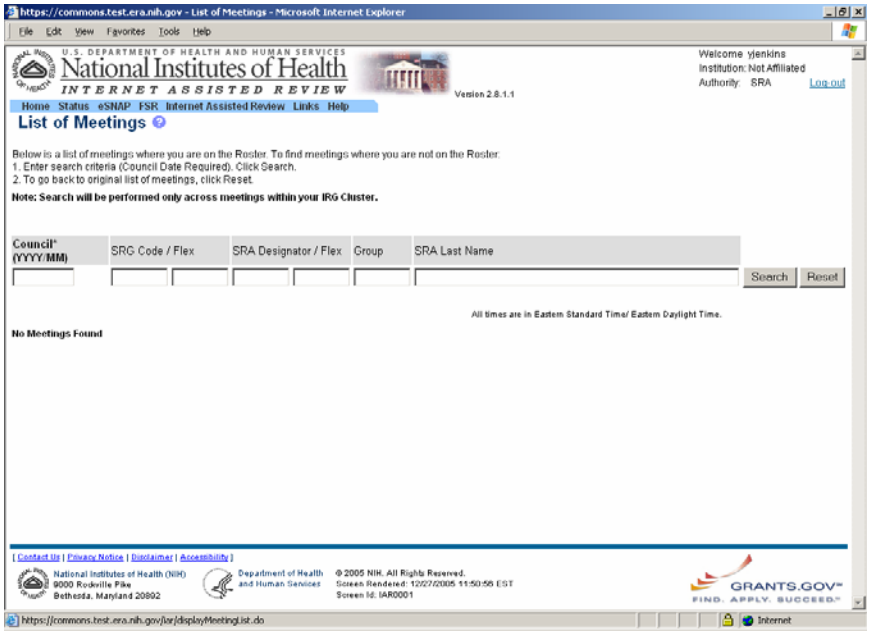


Figure 3: IAR Main Page

Logging Out of IAR

To log out of IAR:

- Select the **Log-out** hypertext link located at the top of each page.

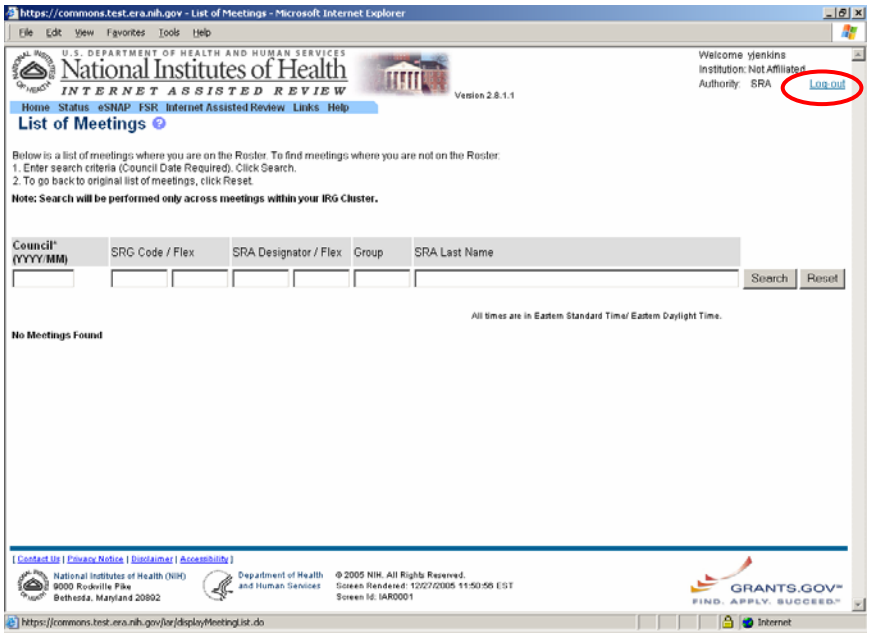


Figure 4: Select the Log-out hypertext link to log out of the IAR System

Expired Session

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.

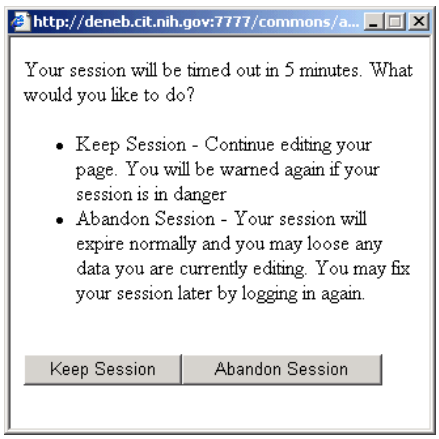


Figure 5: Select Abandon Session to log out of the IAR System

If your session expires while the NIH eRA Commons is open, because you did not 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.

List of Meetings

Overview

The **List of Meetings** screen displays a list of meetings by default if you are assigned as an SRA or GTA to these meetings via the Committee Management System. The list filters out meetings that have been closed in IAR (meetings that have been released from Peer Review longer than 6 months ago). The list of meetings does not show any meetings where the start date of the meeting is set in the past, and the meeting phase dates have not been set.

You can search for other meetings, where you are not assigned as the SRA or GTA for that particular meeting. You must have IRG Cluster Security set to access the meetings you are searching for. If you do not have this setting the meetings will not appear on the **List of Meetings** screen.

When you log on to IAR, the IAR **List of Meetings** Screen (IAR0001, shown in Figure 6) appears with the navigation menu displayed across the top of the screen.

Figure 6: IAR List of Meetings Screen (IAR0001)

Viewing Meeting Information

To view meeting information:

1. Log on to the IAR system as described in *Logging On To IAR* on page 2.

2. Enter the necessary search criteria. The **Council** field is required.

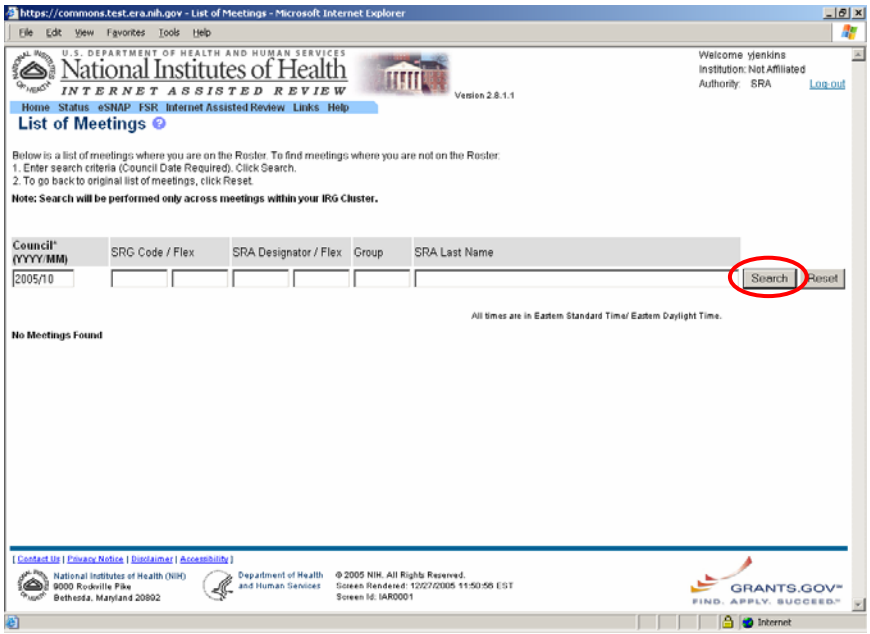


Figure 7: Enter the search criteria and click Search

3. Click **Search**. The List of Meetings that meet the specified search criteria appears (Figure 8).

   Click **Reset** to clear the entered search criteria.

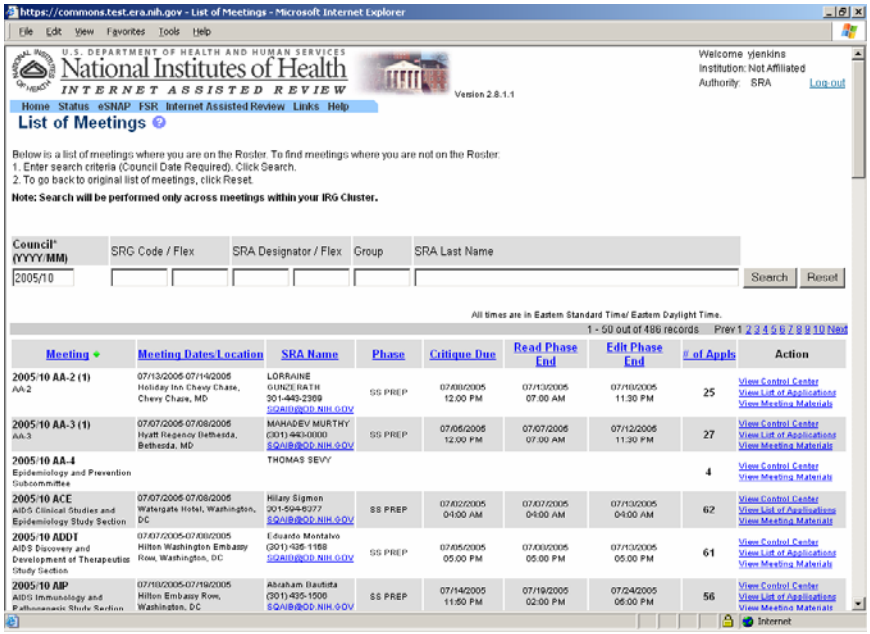


Figure 8: Meeting details are available on the List of Meetings Screen

List of Meetings Screen Details

The following information is included on the **List of Meetings** screen:

- **Meeting**- Includes the meeting identifier and title.

  Meeting title indicates the title of the meeting or panel name if the meeting is a SEP.

- **Meeting Dates/Location**- Identifies the meeting start and end date, hotel name, city and state of meeting location.

- **SRA Name-** First and last name, work telephone number, and work email address of the SRA. SRA email address is a hypertext link that can be selected in order to send an email directly to the SRA.

- **Phase**- The current IAR Phase for the meeting.

- **Critique Due**- Lists the date and time the application critiques are due. This is considered the phase end date.

- **Read Phase End**- The Read phase end date and time.

- **Edit Phase End**- The Edit phase end date and time.

- **# of Appls**- The number of applications scheduled for review in the listed meeting.

- **Action**- Hypertext links that allows access to the **List of Applications Control Center**, and **Meeting Materials** page.

NOTE: Select the title hypertext link of any column to sort the column in ascending/descending order.

Control Center

Overview

After setting up meeting information in Peer Review, you can use the IAR Control Center to manage your meetings and list of 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.

The Control Center allows you 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

NOTE: The list of reviewers on the Control Center is a mirror image of the list of reviewers within the **Assign Reviewers** screen in the Peer Review application. To add or remove reviewers from this list in IAR, use the **Assign Reviewers** screen in the Peer Review Application.

Accessing the Control Center

To access the Control Center screen:

1. Log on to the IAR system as described in *Logging On To IAR* on page 2.
2. Enter the necessary search criteria to access the desired meeting.

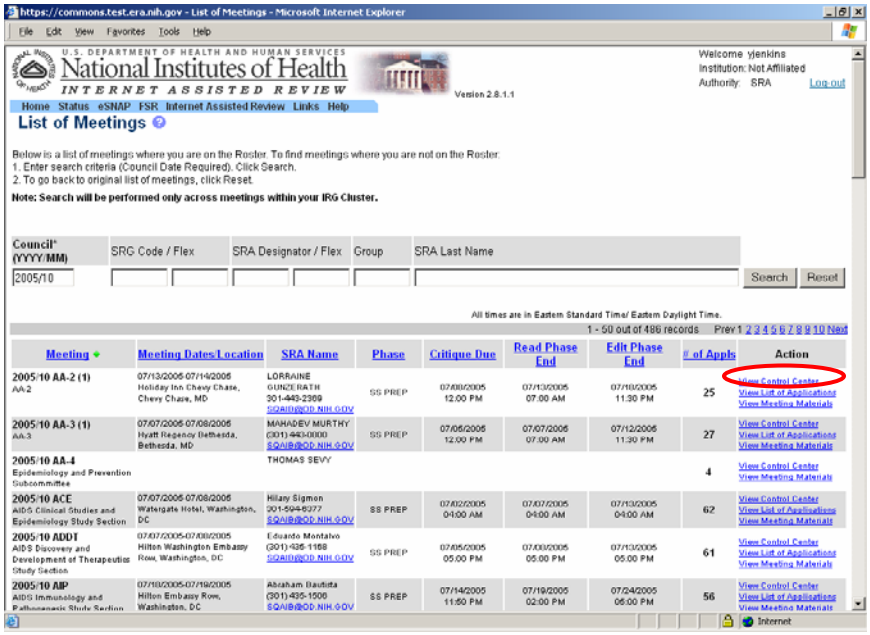


Figure 9: Select the View Control Center hypertext link to access the Control Center Screen

3. Select the **View Control Center** hypertext link in the **Action** column of the desired meeting. The **Control Center** screen (IAR0002) appears (Figure 10).

Figure 10: Control Center Screen (IAR0002)

Control Center Screen Details

The Control Center screen is divided into three blocks. The **Checked Reviewer(s) Options** block, I**AR Related Dates/Times** block, and **Reviewers in the Meeting** block

Checked Reviewer(s) Options Block

Use this block to select various reviewer options to include: enabling/disabling and blocking/unblocking reviewers from reading critiques. See *Enabling/Disabling Reviewers* on page 15 and *Blocking/Unblocking Reviewers* on page 17 for more information about the various options in this section.

IAR Phases and Options Block

Use this block to set the start and end dates for the *Submit*, *Read*, and *Edit* phases of IAR. See *Setting* IAR Phase Dates on page 12 for more information.

Reviewers in the Meeting Block

This block includes detailed information associated with each reviewer that is assigned to the meeting. The following information is included in this block:

- **Select All/ None**-- Select or deselect the 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.

NOTE: 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**-- Indicates the reviewers full name. Telephone reviewers are indicated with (phone) next to their names.
- **Email**-- The email address of the reviewer 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 reviewer doesn't have an existing account the message reads "SRA Update MLG."

  To send an email message to all reviewers:

  - Select one or more reviewers in the reviewers list and then click the **eMail Reviewers** button. An untitled email address opens in your default email messaging system. The **To:** field of the email message will default to the email address of the selected reviewers.

Figure 11: Select the eMail Reviewers button to send an email message to all reviewers assigned to the selected meeting

- **User Name**-- The reviewer user name as listed in the eRA Commons.

- **Active Account**-- This column indicates if the eRA Commons account of the Reviewer is active or not. An active account is indicated with **Active** listed in the column and inactive accounts are indicated with a blank space in the column.
- **In Roster**-- This column indicates (Y/N) if the reviewer is listed in the meeting's roster.
- **E**-- This column indicates **Yes** 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 the reviewer did not submit their own critique.

Setting IAR Phase Dates

Reviewers cannot use the IAR system until the start and end dates for the *Submit* and *Read* phases (and the optional *Edit* phase) have been set in the IAR Control Center.

NOTE: SRAs cannot navigate to the **List of Applications** screen in IAR until the IAR Meeting Phase Dates are set.

IAR phases include:

- *Submit*--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.
- *Read* --Time period after the *Submit* phase (the *Submit* phase end date determines the start of the *Read* Phase). During the *Read* phase, except for applications that are 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* -- The SRA/GTA determines 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. SRAs and GTAs have continued 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*—The time period 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.

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 chronological 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.

To set the IAR Phase Dates:

1. Access the Control Center for the desired meeting, as described in *Accessing the Control Center* on page 9.

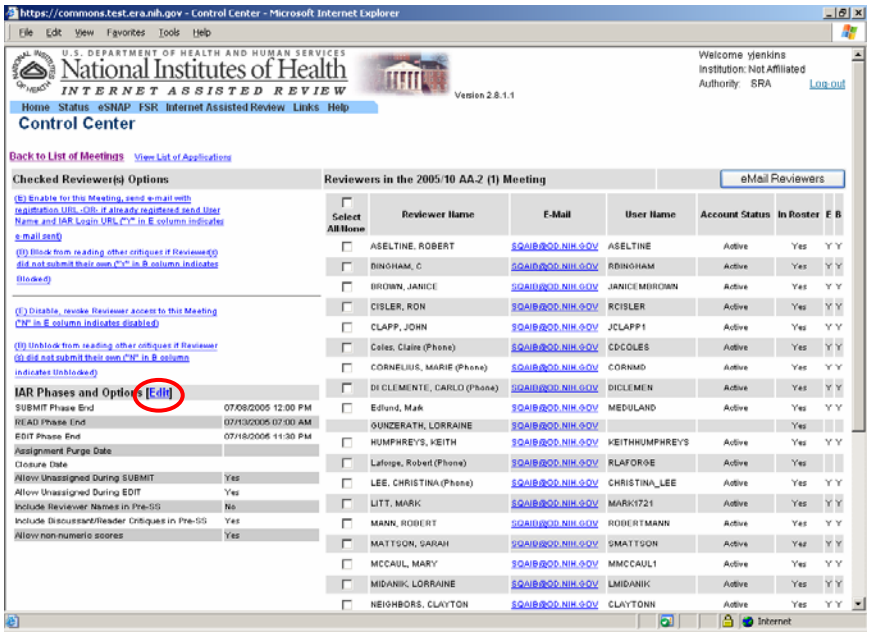


Figure 12: Control Center Screen (IAR0002)

2. Locate the **IAR Phases and Options** block. Select the [**Edit**] hypertext link to access the **Control Center- Edit IAR Phases and Options** screen (IAR0006).

   All end dates that are already set for the *Submit*, *Read*, and *Edit* phases are listed in the corresponding fields

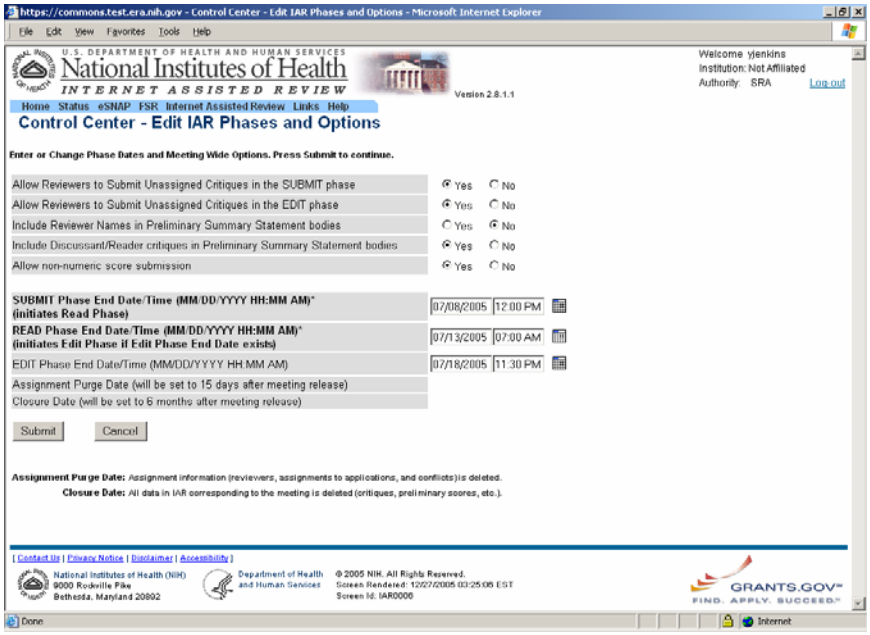


Figure 13: Control Center- Edit IAR Phases and Options (IAR0006)

3. Make the necessary selections or changes to the dates and times for the desired phases.

   If necessary select the calendar icon ( ) and select the appropriate date from the calendar.

4. Click **Submit** to view the information that you entered.

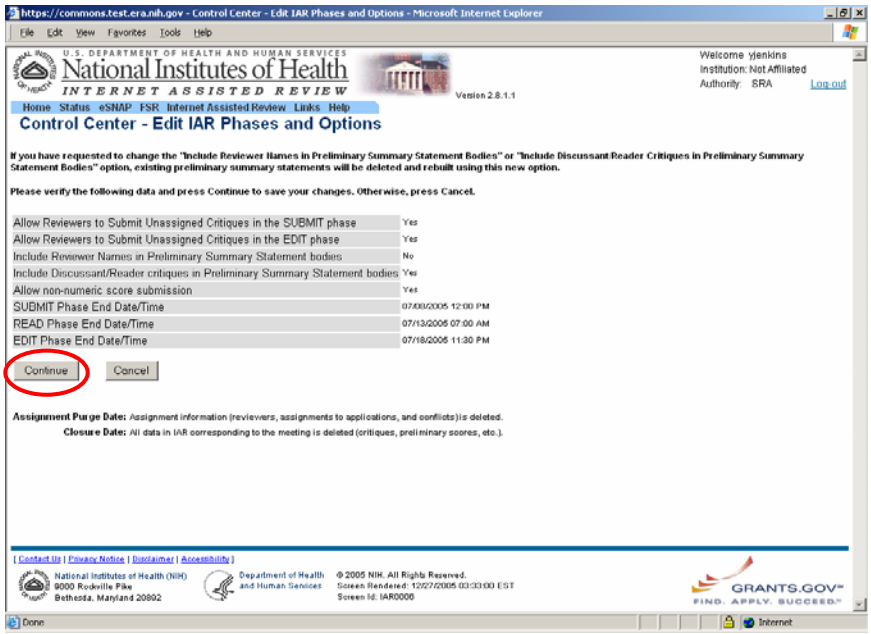


Figure 14: Select Continue to confirm the submission of the IAR Phases and Options updates

5. After careful review of the information you entered, click **Continue** to confirm the submission.

Enabling/Disabling Reviewers

The Control Center also allows you to enable reviewers to use IAR. Enabled reviewers receive a registration notification by email which provides complete information regarding, registering and/or logging on to IAR. By default, enabled reviewers are blocked from reading critiques for applications that they have not submitted their own critique. The defaults for this option can be changed via the Control Center (see *Blocking/Unblocking Reviewers* on page 17 or more information). Disabling reviewers removes their access to the specified meeting.

NOTE: Reviewers in the meeting must be on the Committee Management Meeting Roster before they can be enabled to access IAR.

To enable reviewers to access IAR:

1. Access the Control Center for the desired meeting as described in *Accessing the* Control Center on page 9. The **E** column indicates (Y/N) if the reviewer is enabled.

2. Verify that IAR phase dates are already set (you cannot enable reviewers to use IAR prior to setting the *Read* and *Submit* phase end dates). See *Setting* IAR Phase Dates on page 12 for more information.

3. Select the check box next to the desired reviewer(s).

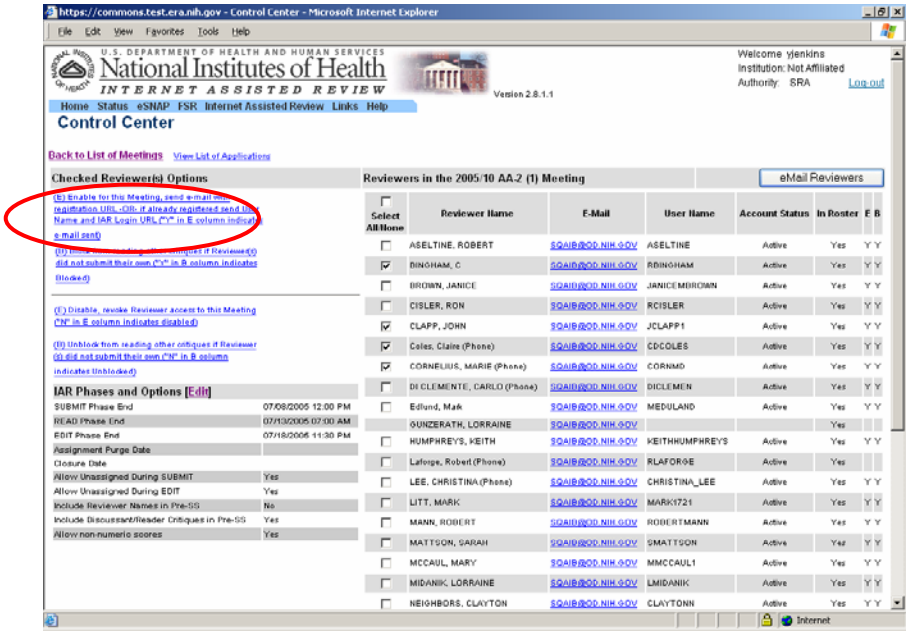


Figure 15: Select the check box next to the desired reviewer(s) name

4. Select the **(E) Enable for this Meeting, send email with registration URL-OR- if already registered send User Name and IAR login URL ("Y" in E column indicates e-mail sent)** hypertext link. The **Control Center—Enable Reviewers for IAR Validation** screen (IAR0003) appears.

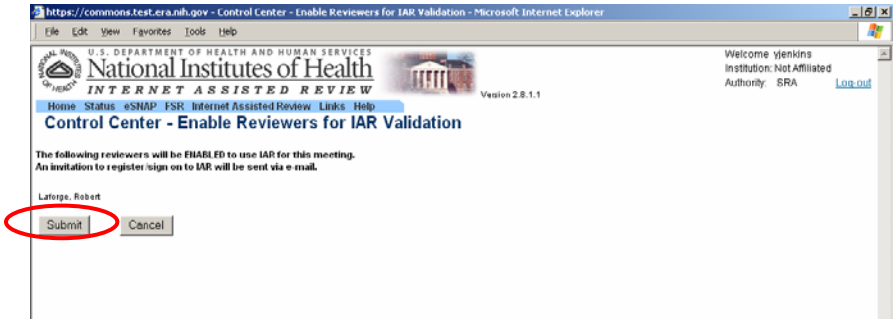


Figure 16: Control Center-Enable Reviewers for IAR Validation Screen (IAR0003)

5. 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.

6. Select the **Back to Control Center** hypertext link to return to the **Control Center** screen.

To disable reviewers from accessing IAR:

1. Access the Control Center for the desired meeting as described in *Accessing the Control Center* on page 9. The **E** column indicates (Y/N) if the reviewer is enabled.

2. Select the check box next to the reviewer(s) whose access you would like to disable.

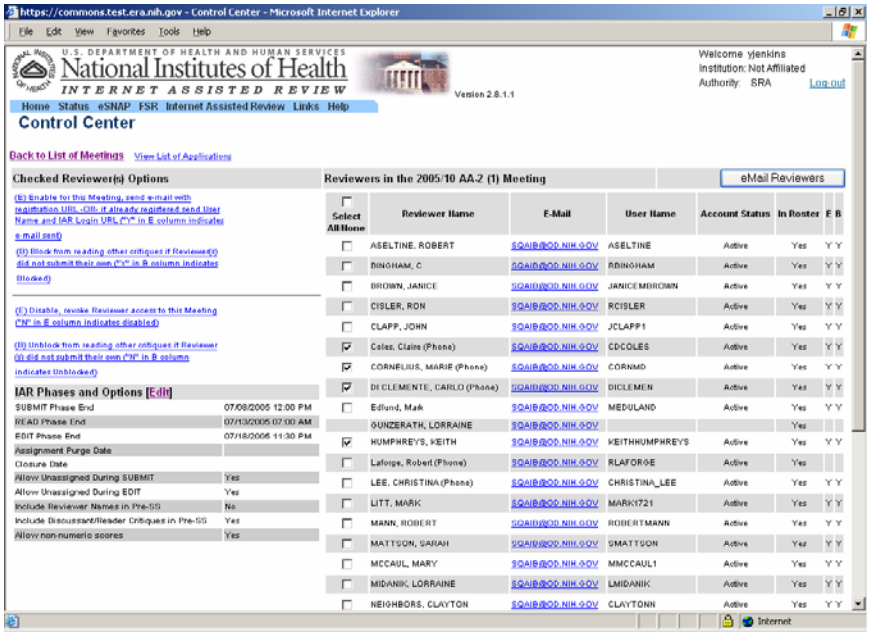


Figure 17: Select the check box next to the desired reviewer(s) name

3. Select the **(E) Disable, revoke Reviewer access to this Meeting ("N" in the E column indicates disabled)** hypertext link. **The Control Center –Disable Reviewers for IAR Validation** screen (IAR0003) appears.

Figure 18: Control Center-Disable Reviewers for IAR Validation Screen (IAR0003)

4. Click **Submit** to confirm the request. IAR removes the selected reviewer's access to the meeting. You are returned to the IAR Control Center.

5. Select the **Back to Control Center** hypertext link to return to the **Control Center** screen.

Blocking/Unblocking Reviewers

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.

Note: Reviewers must be enabled before they can be blocked or unblocked. See *Enabling/Disabling Reviewers* on page 15 for more information about enabling reviewers.

To block reviewers from reading other critiques if they have not yet submitted their own:

1. Access the Control Center for the desired meeting as described in *Accessing the Control Center* on page 9. The **B** column indicates (Y/N) if the reviewer is blocked.

2. Select the check box next to the reviewer(s) you would like to block from reading other critiques.

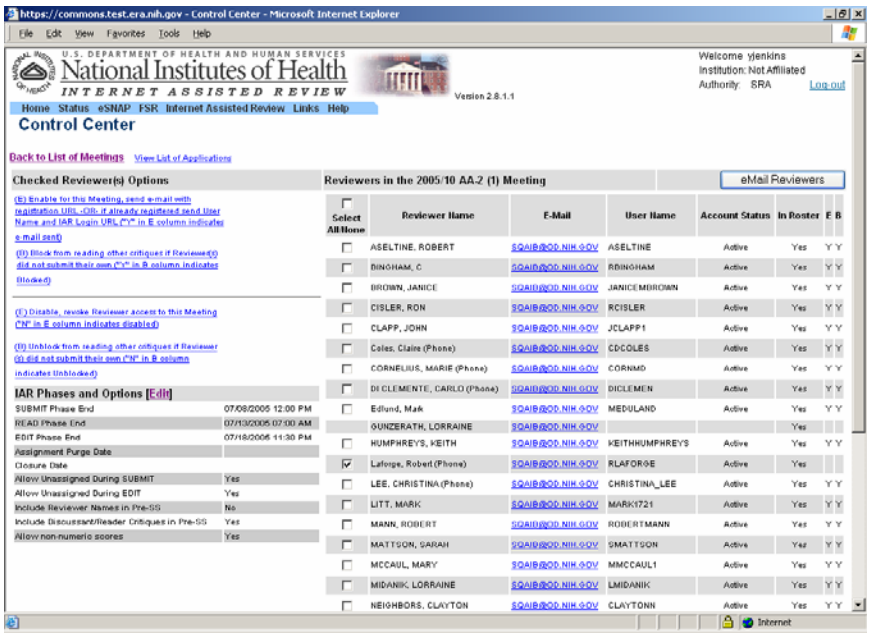


Figure 19: Select the check box next to the name of the reviewers you would like to block access

3. Select the **(B) Block from reading other critiques if Reviewer(s) did not submit their own ("Y" in B column indicates Blocked** hypertext link. The **Control Center—Block Reviewers from Reading Critiques** screen (IAR0005) appears.

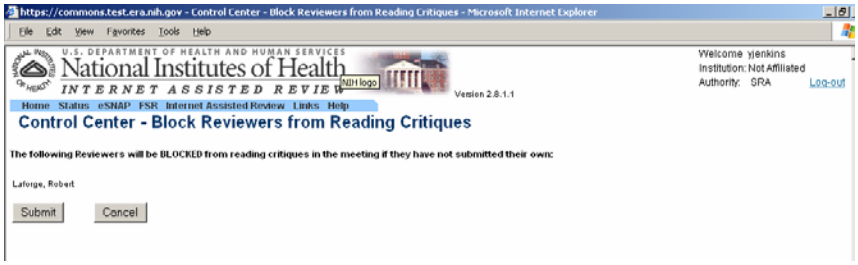


Figure 20: Control Center- Block Reviewers from Reading Critiques Screen (IAR0005)

4. Click **Submit** to confirm the request.

5. Select the **Back to Control Center** hypertext link to return to the **Control Center** screen.

To unblock reviewers and allow them to read other critiques before they have submitted their own:

1. Access the Control Center for the desired meeting as described in *Accessing the Control Center* on page 9. The **B** column indicates (Y/N) if the reviewer is blocked.

2. Select the check box next to the desired reviewer(s) whose access you would like to unblock.

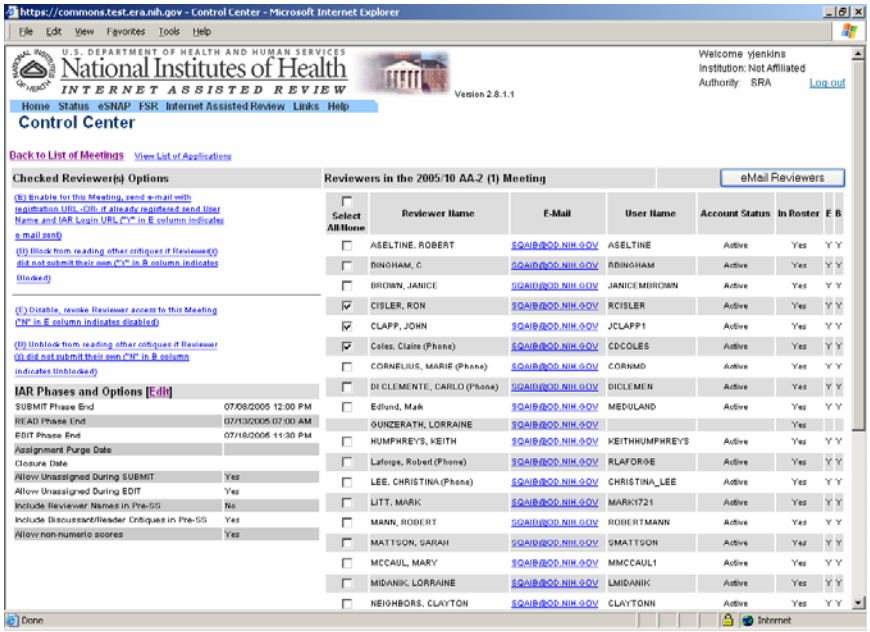


Figure 21: A Y in the B column indicates a reviewer whose access is blocked

3. Select the **(B) Unblock from reading other critiques if the Reviewer(s) did not submit their own ("N" in B column indicates Unblocked** hypertext link. **The Control**

Center—Unblock Reviewers from Reading Critiques screen (IAR0005) appears.

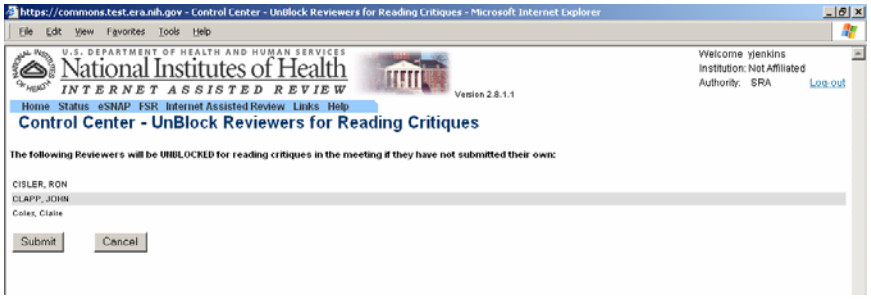


Figure 22: Control Center- UnBlock Reviewers from Reading Critiques Screen (IAR0005)

4. Click **Submit** to confirm the request.

5. Select the **Back to Control Center** hypertext link 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 system default allows unassigned critiques to be submitted in both phases.

To set meeting wide options for unassigned critiques:

1. Access the Control Center for the desired meeting as described in *Accessing the Control Center* on page 11.

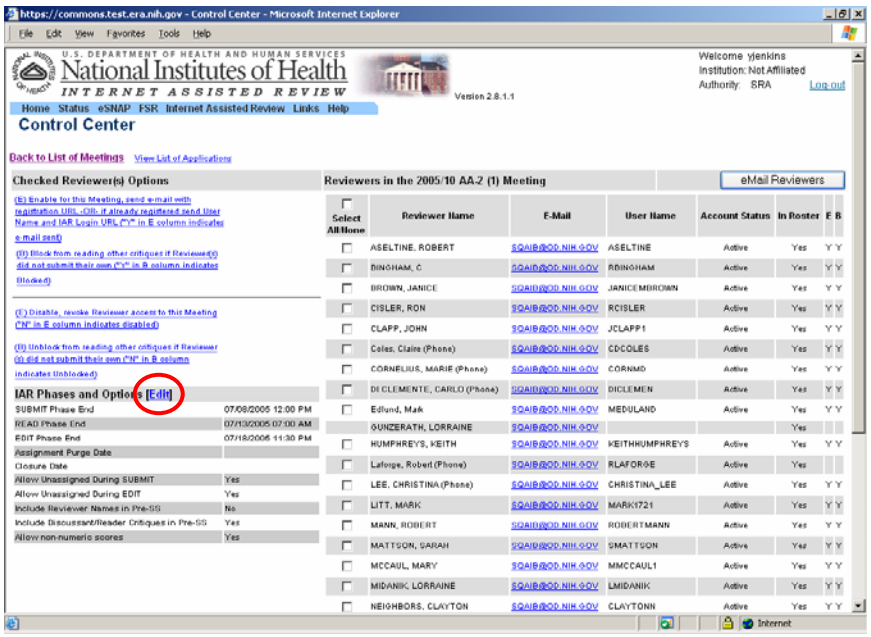


Figure 23: Select the Edit hypertext link to make changes to meeting options

2. From the **IAR Phases and Options** block, select the **Edit** hypertext link to access the **Edit IAR Phases and Options** screen (IAR0006).

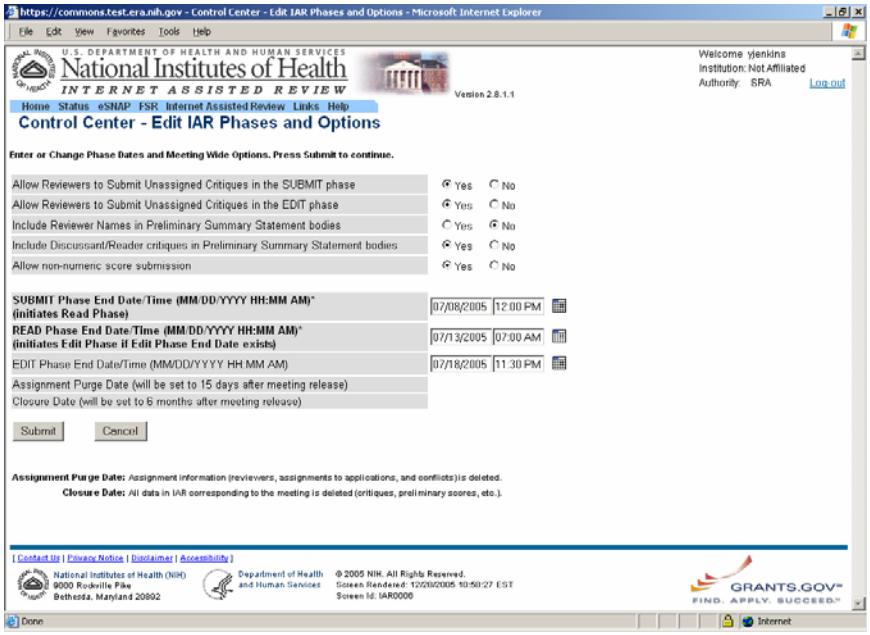


Figure 24: Control Center- Edit IAR Phases and Options (IAR0006)

3. Set the options for allowing reviewers to submit unassigned critiques by selecting **Yes** or **No** for the various meeting options listed at the top of the page.

4. Click **Submit** to view the information that you entered (Figure 25).

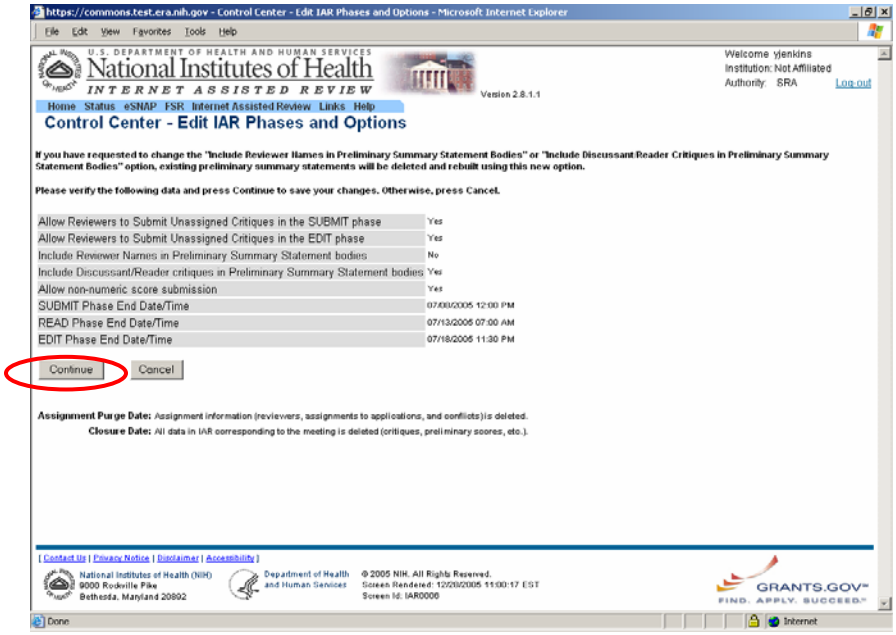


Figure 25: Verify the options that you have selected and click continue to confirm the submission

5. Click **Continue** to confirm the submission.

6. Select the **Back to Control Center** hypertext link to return to the **Control Center** screen.

List of Applications

Overview

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 the current IAR phase and the user type (SRA/GTA or reviewer).

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

Accessing the List of Applications Screen

The **List of Applications** screen lists all applications that are included in the search criteria you entered on the **List of Meetings** page. Each application has a link for submitting critique. Details concerning the available information according to the IAR phase include:

Submit Phase:

- If a critique has already been submitted, links are available to delete or to view the critique.

Read Phase:

- If you have been permitted by your SRA/GTA to view the critiques of other reviewers, the list of available applications will list only assigned applications or all reviewed applications.
- If you have not submitted a critique on an application and are blocked from reading the critiques of other reviewers, the only option available for the blocked application is the *Submit* option.
- All other applications will each have a separate link for viewing critiques

Edit Phase:

- Each application has a link for submitting a critique. If you have already submitted a critique, other links allow you to delete and view the critique.

- If you have not submitted a critique on an application and are blocked from reading the critiques of other reviewers, the only option available for blocked applications is the *Submit* option.

To access the **List of Applications** screen:

1. Access the IAR **List of Meetings** screen as described in *Viewing Meeting Information* on page 7.

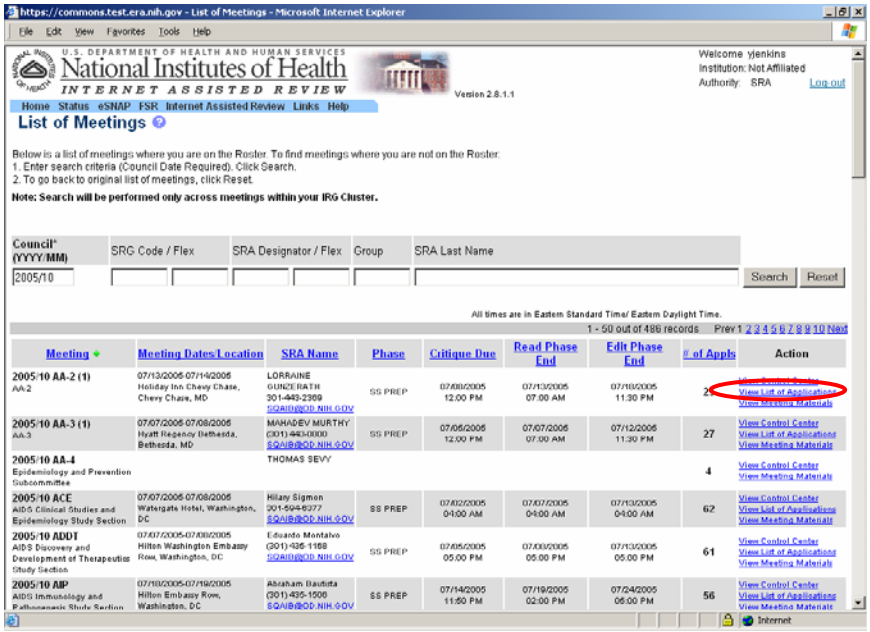


Figure 26: Select the View List of Application hypertext link to access the List of Application screen

2. Select the **View List of Applications** hypertext link displayed in the **Action** column of the application you would like to view. The **List of Applications** screen appears (Figure 27).

Figure 27: List of Applications Screen

List of Applications Screen

At the top of the **List of Applications** screen specific details pertaining to the application you selected appear. The details include:

- **Meeting Title** – Lists the title of the meeting or the pane 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.

  Example: SRG Meeting is 2002/10 PC-1 (01)

  Example: SEP Meeting is 2002/10 ZRG1 SRG-F (GC) X 001
- **Meeting Phase** – Displays the current IAR phase for the meeting.
- **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 Navigation Links

There are several links on the **List of Applications** screen that allow you to navigate the IAR application in several ways.

Back to List of Meetings

Use the **Back to List of Meetings** hypertext link to return to the **List of Meetings** screen (Figure 28). Use this link instead of using the browser's Back button.

Figure 28: Select the Back to List of Meetings hypertext link to return to the List of Meetings Screen

View Control Center

Select the **View Control Center** hypertext link to access the **Control Center** screen.

View List by Reviewer

Select the **View List by Reviewer** hypertext link to view a list of all applications for the selected meeting, including those with conflicts in ascending sort order by reviewer name.

View List by Application

Select the **View List by Application** hypertext link to view a list of all applications for the selected meeting, including those with conflicts in ascending sort order by application number. This is the default setting for the **List of Applications** screen.

View All Meeting Critiques by Application

Select the **View All Meeting Critiques** **By Appl** hypertext link to access an Adobe Acrobat® PDF file that lists the critiques for all applications included in the selected meeting in ascending order by application number.

View All Meeting Critiques by PI

Select the **View All Meeting Critiques** **By PI** hypertext link to access an Adobe Acrobat® PDF file that lists the critiques for all applications included in the selected meeting in ascending order by PI name.

SRA/GTA

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

1. Select the **SRA/GTA** hypertext link located at the bottom of the **List of Applications** screen to obtain SRA/GTA contact information.

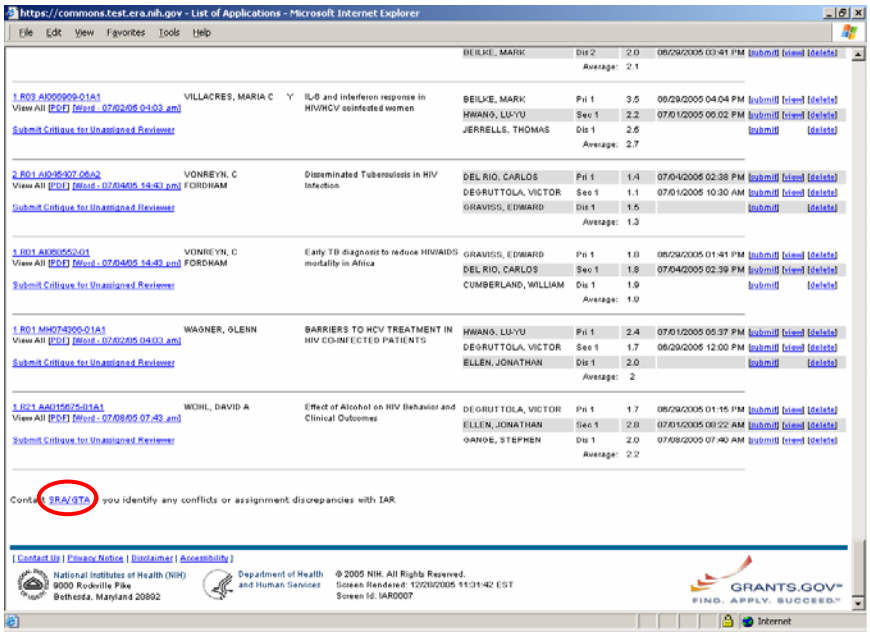


Figure 29: Select the SRA/GTA hypertext link to access contact information for the assigned SRA/GTA

- The SRA/GTA Name and Contact Information page (IAR0010) appears. The page displays SRA/GTA name, telephone number and email address.

Figure 30: SRA/GTA Name and Contact Information (IAR0010)

2. The email address is in the form of a hyperlink so that an email can be sent to the SRA/GTA. Select the hyperlink to open your default email program.

View Grant Folder

Select the application number hypertext link to view the Grant Folder Screen that is available to reviewers ().

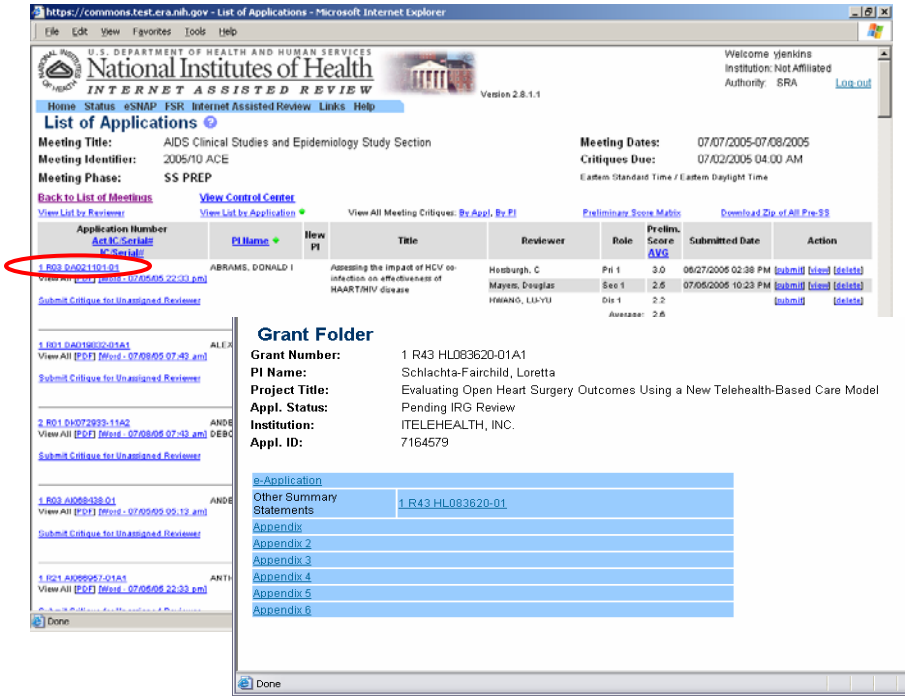


Figure 31: Select the application number hypertext link to access the Grant Folder Screen

NOTE: The Grant Folder screen only lists eApplication, Other Summary Statements, and Appendices files within IAR. To view a complete list of an application's documents access the Grant Folder from the Peer Review system.

Submitting Critiques/Scores

Overview

IAR allows you to submit critiques and scores for your assigned reviewers during all IAR phases. Critiques cannot be submitted for unassigned applications.

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, α or β) insert them as symbols within the Microsoft Word document.

Review Criteria

The following special considerations are part of the review criteria:

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

This above list is not inclusive; other criteria may apply for a specific review group. Contact your SRA for guidance.

Managing Application Critiques

Use the **Submit Critique and Preliminary Score** screen to submit application scores and critiques. You can also view and delete critiques from the **List of Applications** screen.

Submitting Critiques

To submit critiques/scores:

1. Access the IAR application as described in *Logging On To IAR* on page 2.

2. From the **List of Meetings** screen, select the **View List of Applications** hypertext link (in the **Action** column) to open the **List of Applications** screen for the application you desire (IAR0007).

Figure 32: Select the Submit hypertext link to submit critiques and scores

3. Click the **Submit** hypertext link in the **Action** column for the desired application to access the **Submit Critique and Preliminary Score** screen (IAR0011).

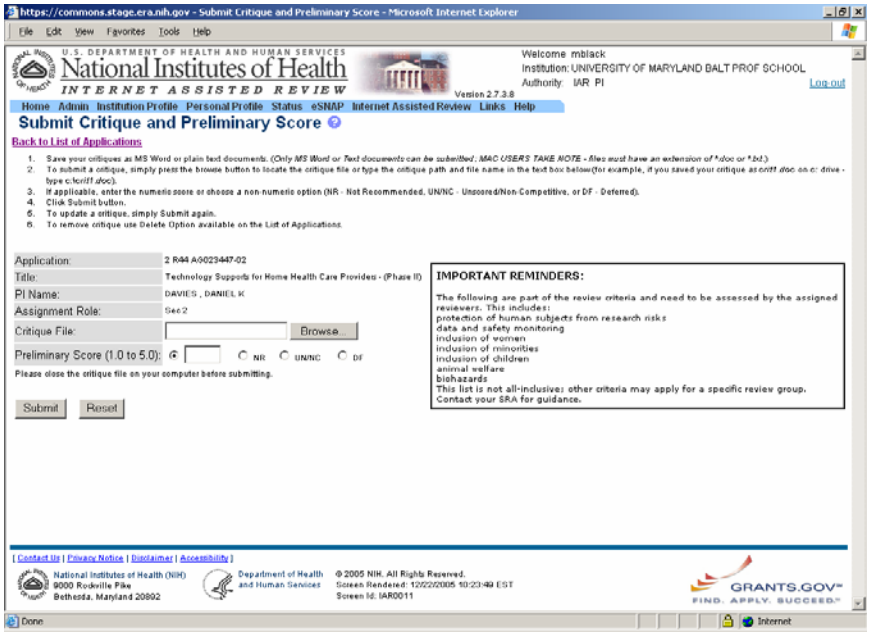


Figure 33: Submit Critique and Preliminary Score Screen (IAR0011)

4. Enter the full path and filename (including extension) of the critique or click **Browse** to locate the file.

5. If applicable, either a numeric score or a score code can be entered.

NOTE: A numeric score must be within a range of 1.0–5.0. If you do not wish to add a numeric score you must use one of the following codes: NR (not recommended), UN/NC (unscored/not competitive), or DF (deferred). Only one option is permitted.

6. Click **Submit** to upload the file. The file is checked for the proper file type and is virus-checked. A message appears to validate the submission, with an option to cancel or submit critique and score.

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

To view an individual critique (during all IAR phases):

1. From the List of Meetings screen, select the **View List of Applications** hypertext link of the desired application to access the **List of Applications** screen (IAR0007).

NOTE: 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.

Figure 34: Select the view hypertext link to view a PDF or Word document of the critique for the selected application

2. Select the [**view**] hypertext link from the **Action** column of the desired application. The critique is usually viewed in Adobe PDF, but may be displayed in the original Word/text format if the conversion has not occurred.

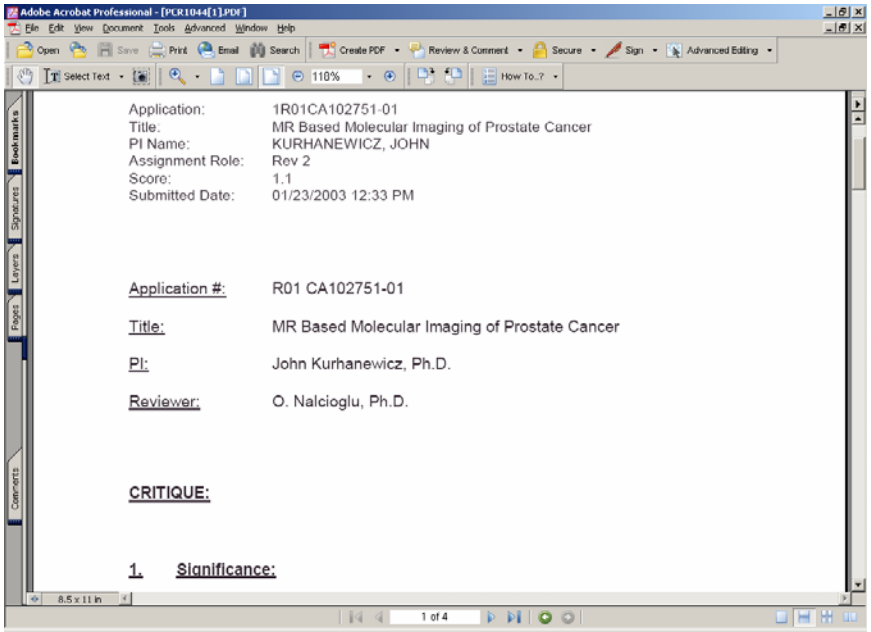


Figure 35: Critique View as it appears in Adobe Acrobat Reader®

To view critiques for all applications in a meeting:

1. From the List of Meetings screen, select the **View List of Applications** hypertext link of the desired application to access the **List of Applications** screen (IAR0007).

2. Select the **View All Meeting Critiques: By Appl** or **By PI** hypertext link.
   - When the **By Appl** hypertext link is selected, the critiques are listed in order by application number with a secondary sort on the reviewer assignment role.
   - When the **By PI** hypertext link is selected, the critiques are listed in alphabetical order by PI last name. This option is only available to SRA/GTAs.

To view all critiques submitted for a specific application:

1. From the List of Meetings screen, select the **View List of Applications** hypertext link of the desired application to access the **List of Applications** screen (IAR0007).

2. Select the **View List by Application** hypertext link located below the meeting information at the top of the page.

3. Select the **View All [PDF]** or **[Word]** hypertext link located in the **Application Number** column for the desired application.

- An Adobe PDF document of all critiques for the application is created when **View All [PDF]** is selected.

- A Microsoft Word document of all critiques is created when **View All [Word]** is selected. The critiques are listed in order of reviewer assignment role

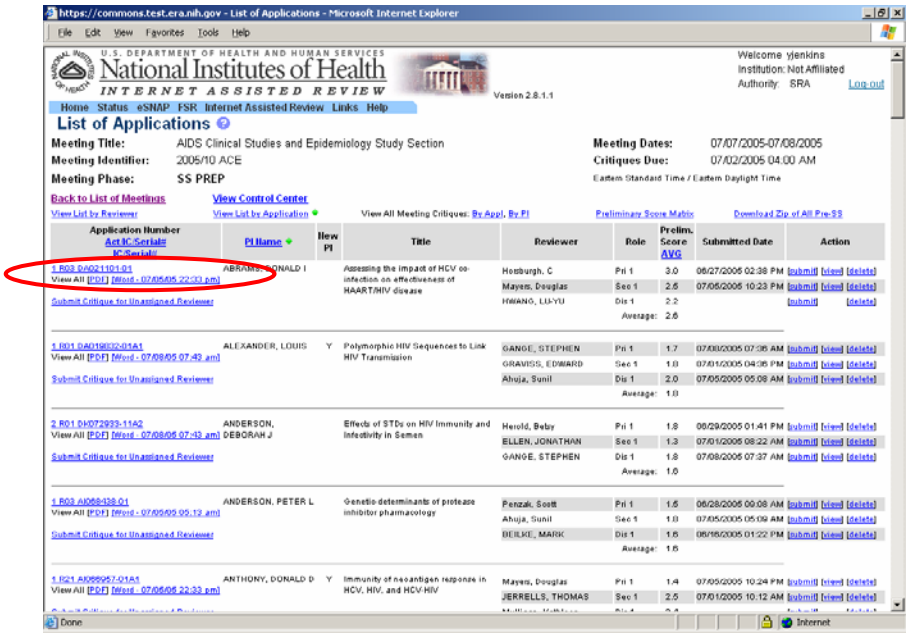


Figure 36: Select the appropriate hypertext link from the Application Number column to view a document that lists all application critiques

To view all critiques by a specific reviewer:

1. From the **List of Meetings** screen, select the **View List of Applications** hypertext link of the desired application to access the **List of Applications** screen (IAR0007).

2. Select the **View List by Reviewer** hypertext link located below the meeting information at the top of the page. The list is sorted by the reviewer's last name (with a secondary sort by reviewer assignment role and a tertiary sort by the PI last name). Additional sort options include:

   - **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)

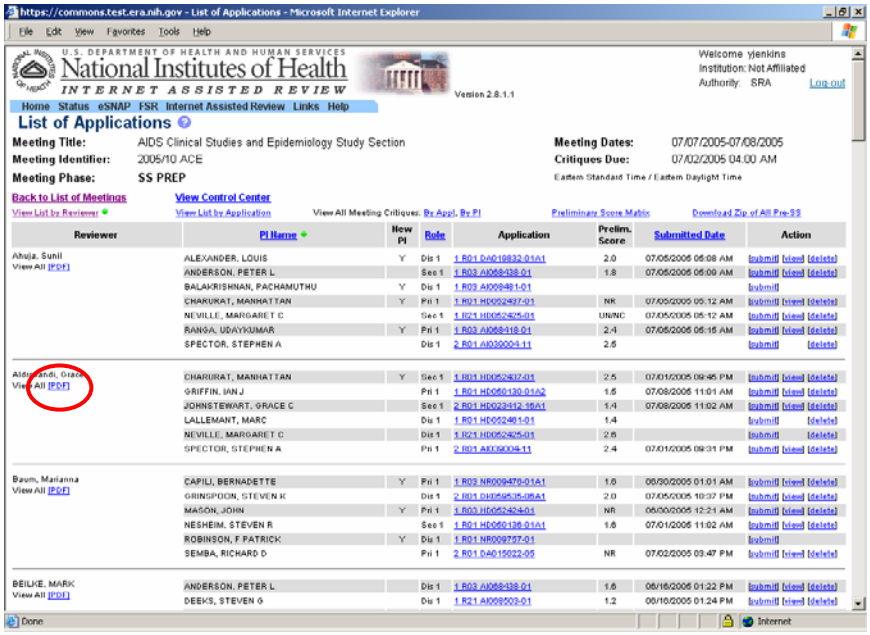


Figure 37: Select the hypertext link located in the Reviewer column to view a PDF document that includes all critiques by a specific reviewer

3. Click the **View All [PDF]** hypertext link 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.

Deleting Critiques

To delete a critique:

1. From the **List of Meetings** screen, select the **View List of Applications** hypertext link of the desired application to access the **List of Applications** screen (IAR0007).

Figure 38: Select the delete hypertext link from the Action column on the List of Applications Screen

2. Select the [**delete**] hypertext link from the **Action** column for the desired reviewer. The **Delete Critique/Score** screen appears (Figure 39).

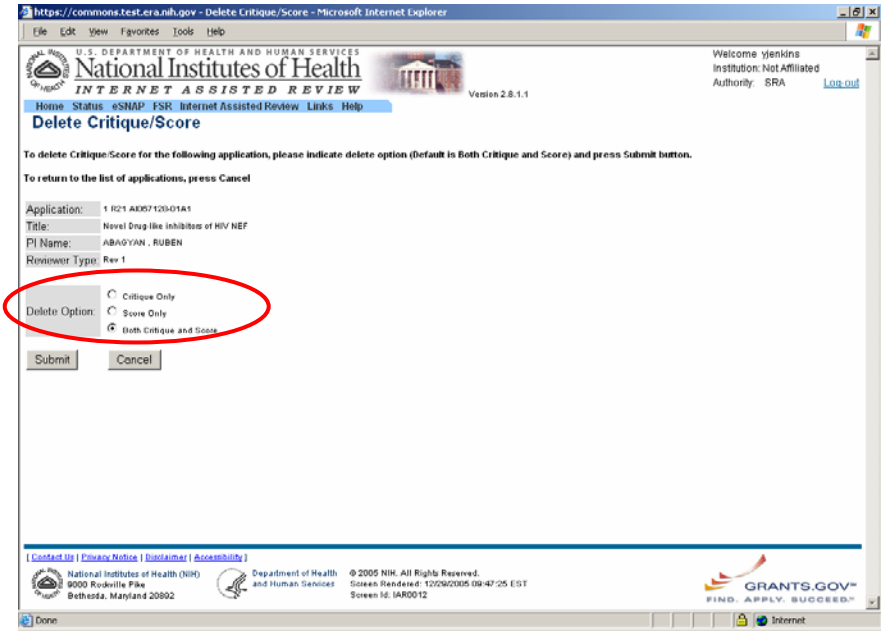


Figure 39: Click Submit to confirm the deletion of the critique/score

3. Select the delete option. You have the following delete options:
   - Critique Only

- Score Only
- Critique and Score (default selection)

4. Click **Submit**. A confirmation appears to allow you to verify deletion of the option you selected.

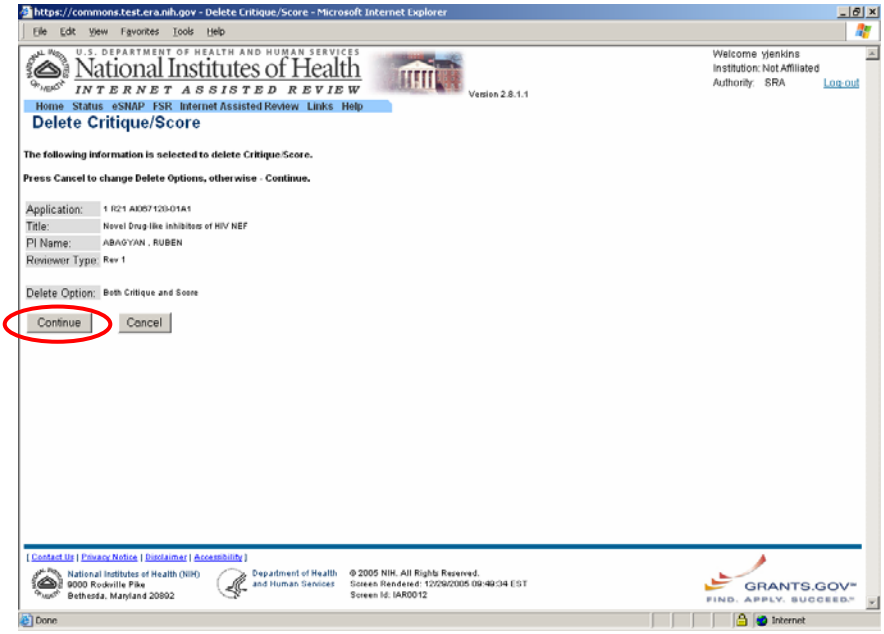


Figure 40: Confirm deletion of the selected options and click Continue

5. Click **Continue**. The critique/score selected option, is deleted from the application's record.

   You are returned to the **List of Applications** screen, and the [**delete**] hypertext link no longer exists for the critique/score that you deleted.

Submitting Critiques for Unassigned Reviewers

As an SRA/GTA you have the option of submitting critiques for unassigned reviewers.

To submit a critique for an unassigned reviewer:

1. From the **List of Meetings** screen, select the **View List of Applications** hypertext link of the desired application to access the **List of Applications** screen (IAR0007).

Figure 41: SRAs/GTAs have the ability to submit critiques for unassigned reviewers

2. Select the **Submit Critique for Unassigned Reviewer** hypertext link. The **Submit Critique and Preliminary Score** screen appears.

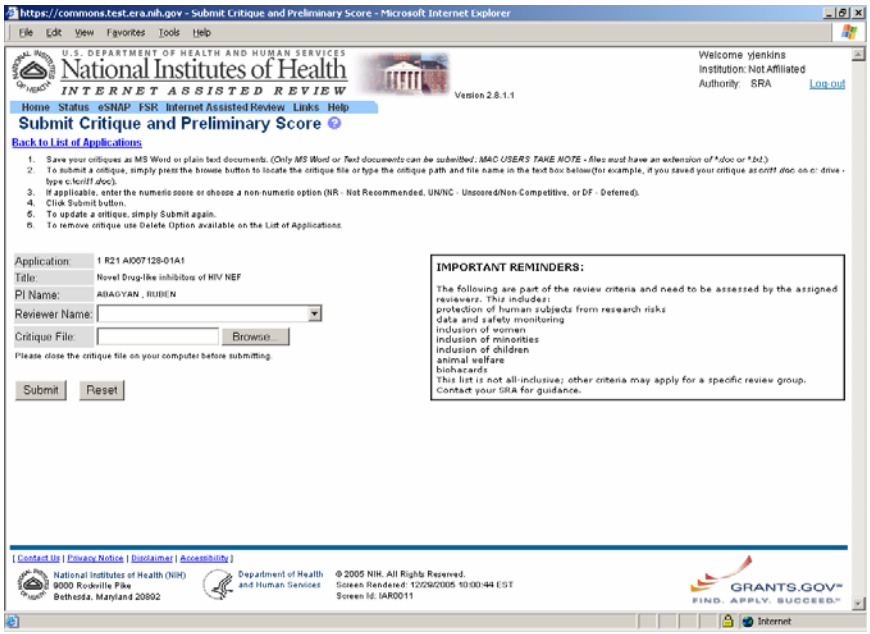


Figure 42: Submit Critique and Preliminary Score Screen (IAR0011)

3. Select the Reviewer from the **Reviewer Name** drop-down list.

4. Enter the full path and filename (including extension) of the critique or click **Browse** to locate the file.

5. Click **Submit** to upload the file. The file is checked for the proper file type and is virus-checked. A message appears to validate the submission, with an option to cancel or submit critique and score.

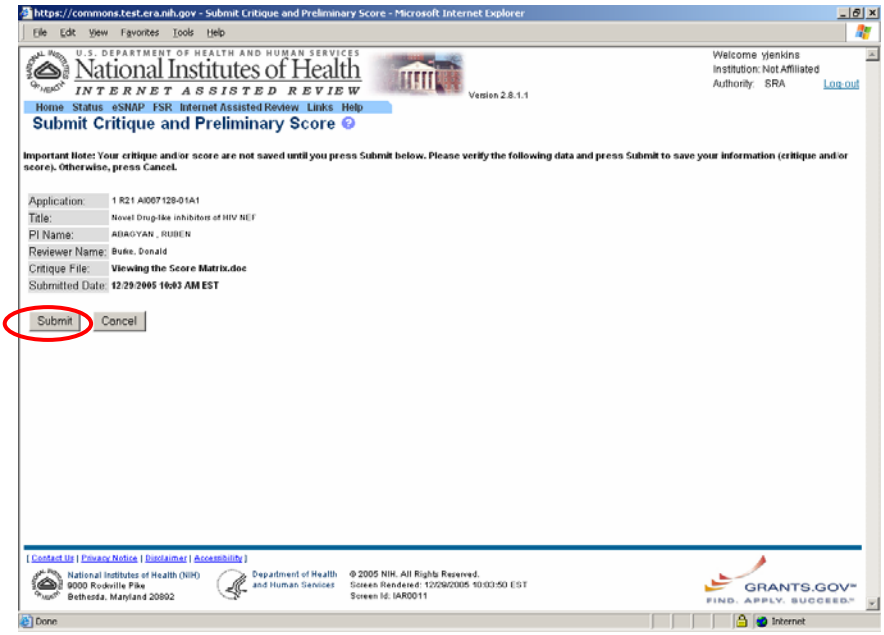


Figure 43: Click Submit to submit the critique and score

6. Click **Submit** to submit the critique. You are returned to the **List of Applications** screen.

Streamlining

Overview

Streamlining is the practice of identifying applications with low scores, also known as lower half scores. 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.

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.

Viewing the Score Matrix

The Score Matrix page is used by the SRA/GTA during the *Submit* and *Read* phases to determine which applications should make up the lower half. The Score Matrix is available in two views—Show All Applications (the default view) and Show Lower Half Applications Only.

To access the Preliminary Score Matrix page:

1. Log in to IAR as described in *Logging On To IAR* on page 2 for further details.
2. From the **List of Meetings** screen, select the **View List of Applications** hypertext link of the desired application to access up the **List of Applications** screen (IAR0007).

Figure 44: Select the Preliminary Score Matrix hypertext link from the List of Applications Screen

3. Select the **Preliminary Score Matrix** hypertext link located below the meeting information at the top of the page. The **Preliminary Score Matrix** page (IAR0008) appears. By default, all applications are listed and sorted by PI name (Figure 45).

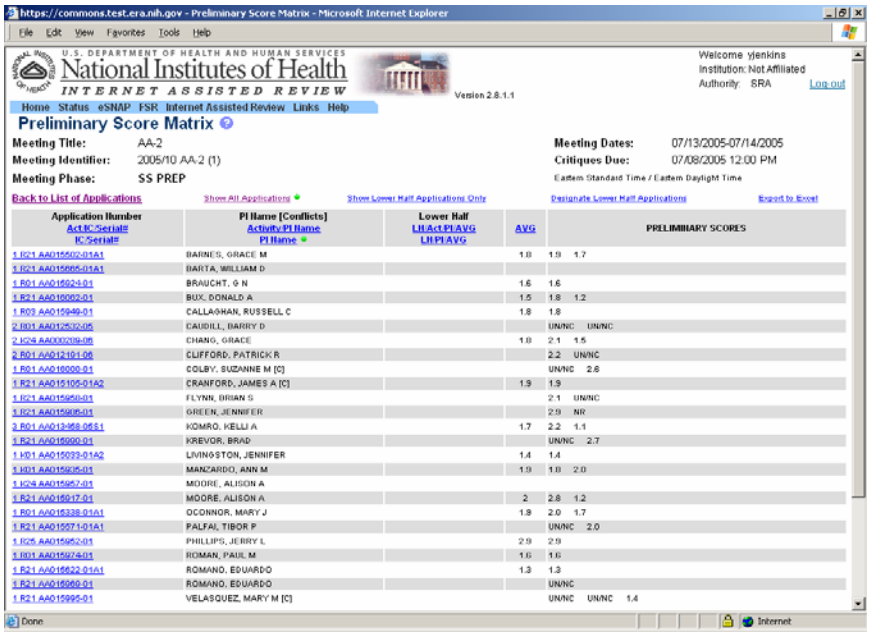


Figure 45: Preliminary Score Matrix Screen (IAR0008)

4. To view lower half applications only:

- Select the **Show Lower Half Applications Only** hypertext link.

Preliminary Score Matrix Screen Details

The following information appears on the **Preliminary Score Matrix** Screen:

- **Application Number**

  Lists the full application number. This column can be sorted by either activity/IC/serial number or by IC/serial number.

- **PI Name**

  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:

  --LH/ACT/PI/AVG (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.

  --LH/PI/AVG (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 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.

- **Preliminary Scores**

  Lists the individual preliminary scores submitted for the applications.

Designating Lower Half Applications

To designate lower half applications:

1. Log in to IAR as described in *Logging On To IAR* on page 2 for further details.

2. From the **List of Meetings** screen, select the **View List of Applications** hypertext link of the desired application to access up the **List of Applications** screen (IAR0007).

3. Select the **Preliminary Score Matrix** hypertext link located below the meeting information at the top of the page. The **Preliminary Score Matrix** page (IAR0008) appears. By default, all applications are listed and sorted by PI name (Figure 45).

4. From the **Preliminary Score Matrix** screen, select the **Designate Lower Half Applications** hypertext link. The **Edit Score Matrix** screen appears (Figure 46).

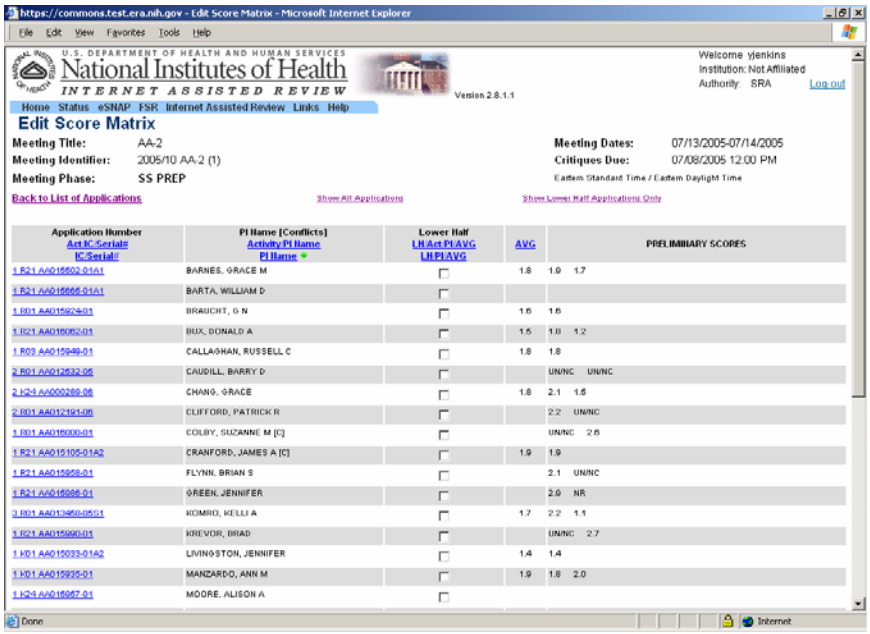


Figure 46: Edit Score Matrix Screen

5. Select the applications you would like to designate as lower half applications by selecting the checkbox in the **Lower Half** column of the desired applications.

6. Click **Submit** (located at the bottom of the screen). You are returned to the **Preliminary Score Matrix** screen, and the lower half applications are indicated by an X in the **Lower Half** column (Figure 47).

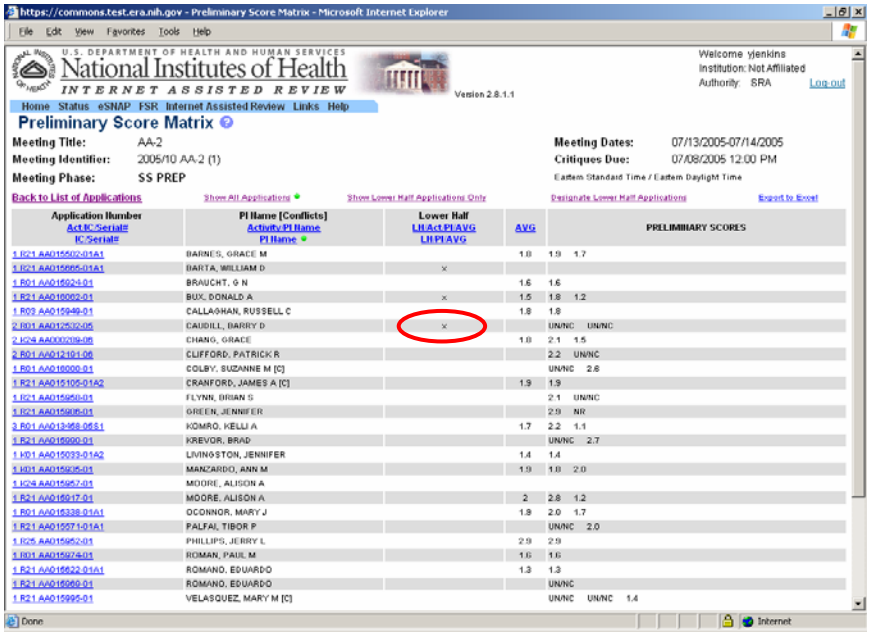


Figure 47: Lower Half Applications are indicated with an X in the Lower Half columns

NOTE: Select the **Show Lower Half Application Only** hypertext link to view a list of applications that are considered lower half applications.

Export to Excel

To export the Preliminary Score Matrix to an Excel file:

1. Access the **Preliminary Score Matrix** screen as described in *Preliminary Score Matrix Screen Details* on page 42 for further details.

2. Select the **Export to Excel** hypertext link. The **File Download** window appears (Figure 48).

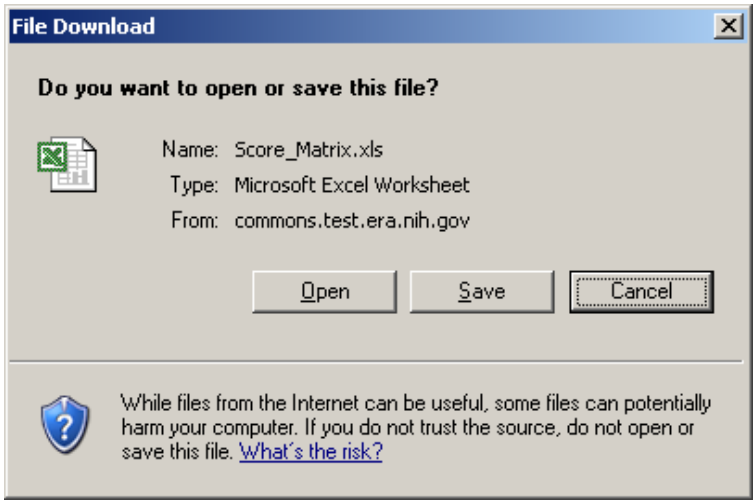
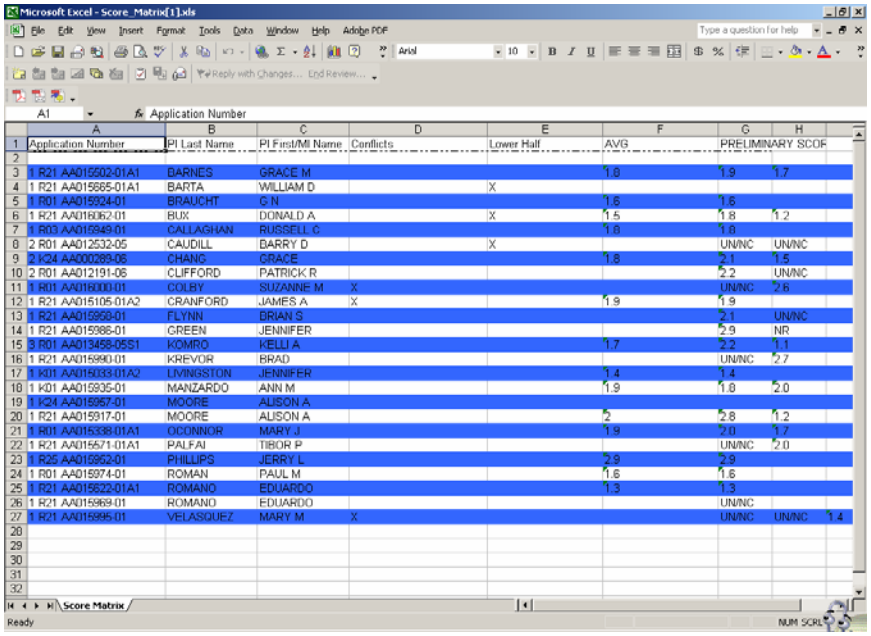


Figure 48: File Download Window

3. Click **Open**. The contents of the **Preliminary Score Matrix** screen appears Microsoft Excel format (Figure 49).



Application Number	PI Last Name	PI First/MI Name	Conflicts	Lower Half	AVG	PRELIMINARY SCOR		
1 R21 AA015502-01A1	BARNES	GRACE M			1.8	1.9	1.7	
1 R21 AA015865-01A1	BARTA	WILLIAM D		X				
1 R01 AA015924-01	BRAUCHT	G N			1.6	1.6		
1 R21 AA016062-01	BUX	DONALD A		X	1.5	1.8	1.2	
1 R03 AA015949-01	CALLAGHAN	RUSSELL C			1.8	1.8		
2 R01 AA012532-05	CAUDILL	BARRY D		X		UN/NC	UN/NC	
2 K24 AA000283-06	CHANG	GRACE			1.8	2.1	1.5	
2 R01 AA012191-06	CLIFFORD	PATRICK R				2.2	UN/NC	
1 R01 AA016000-01	COLBY	SUZANNE M	X			UN/NC	2.6	
1 R21 AA015105-01A2	CRANFORD	JAMES A	X		1.9	1.9		
1 R21 AA015958-01	FLYNN	BRIAN S				2.1	UN/NC	
1 R21 AA015986-01	GREEN	JENNIFER				2.9	NR	
3 R01 AA013458-05S1	KOMRO	KELLI A			1.7	2.2	1.1	
1 R21 AA015990-01	KREVOR	BRAD				UN/NC	2.7	
1 K01 AA015033-01A2	LIVINGSTON	JENNIFER			1.4	1.4		
1 K01 AA015935-01	MANZARDO	ANN M			1.9	1.8	2.0	
1 K24 AA015967-01	MOORE	ALISON A						
1 R21 AA015917-01	MOORE	ALISON A			2	2.8	1.2	
1 R01 AA015338-01A1	OCONNOR	MARY J			1.9	2.0	1.7	
1 R21 AA015571-01A1	PALFAI	TIBOR P				UN/NC	2.0	
1 R25 AA015962-01	PHILLIPS	JERRY L			2.9	2.9		
1 R01 AA015974-01	ROMAN	PAUL M			1.6	1.6		
1 R21 AA015622-01A1	ROMANO	EDUARDO			1.3	1.3		
1 R21 AA015969-01	ROMANO	EDUARDO				UN/NC		
1 R21 AA015995-01	VELASQUEZ	MARY M	X			UN/NC	UN/NC	1.4

Figure 49: Preliminary Score Matrix Screen after being exported into Excel format

Summary Statements

Overview

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 the 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 Compilation

A compilation of application critiques make up the summary statement. Critiques are merged in order of assignment priority (Primary, Secondary, Tertiary, Reader, Discussant, and 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.

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.

Viewing Pre-Summary Statements

The body of the pre-summary statement is available after the *Submit* phase has ended.

To view the details of the pre-summary statement:

1. Log in to IAR as described in *Logging On To IAR* on page 2.
2. From the **List of Meetings** screen, select the **View List of Applications** hypertext link in the **Action** column to access up the **List of Applications** screen (IAR0007).
3. In the **Application Number** column of the desired application, select 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.

Figure 50: Select the Word hypertext link to open the file or to save it to your computer

To download a zipped file of all pre-summary statements:

1. Access the **List of Applications** screen.

Figure 51: Select the Download Zip of All Pre-SS hypertext link

2. Select the **Download Zip of All Pre-SS** hypertext link. The **File Download** window appears. You have the option of

opening the zipped file from its current location or save the file to your computer.

Preliminary Summary Statement Reviewers Details

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

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

1. Access the Control Center for the desired meeting as described in *Accessing the Control Center* on page 11.

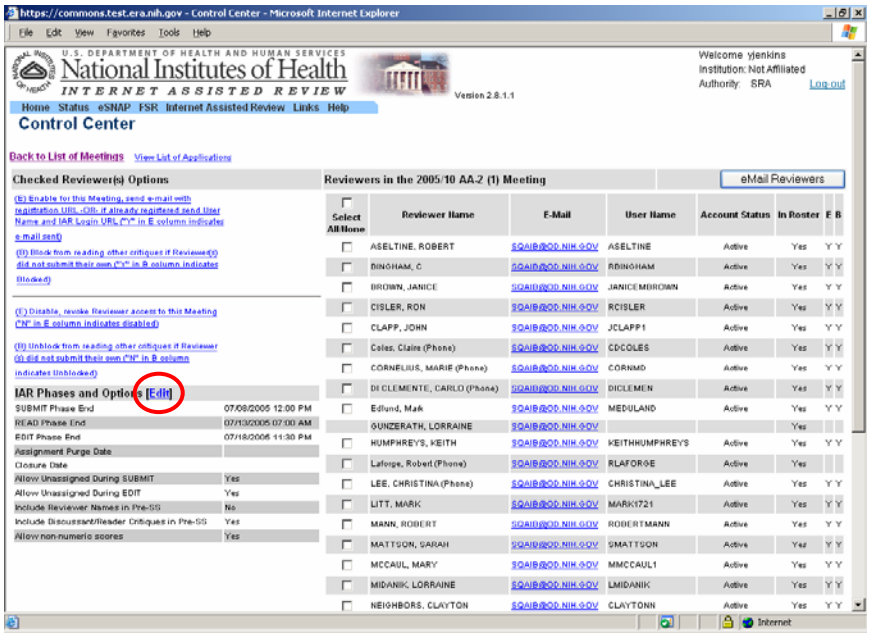


Figure 52: Select the Edit hypertext link to make changes to meeting options

2. From the **IAR Phases and Options** block, select the **Edit** hypertext link to access the **Edit IAR Phases and Options** screen (IAR0006).

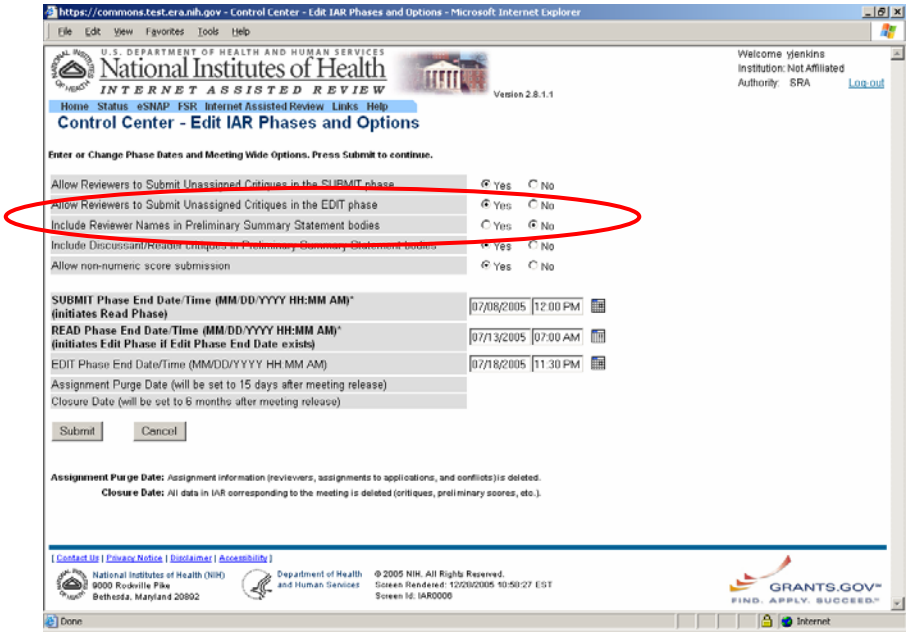


Figure 53: Control Center- Edit IAR Phases and Options (IAR0006)

3. Set the options for including reviewer names in the preliminary summary statement bodies. Select the **Yes** option.

4. Click **Submit** to view the information that you entered (Figure 25).

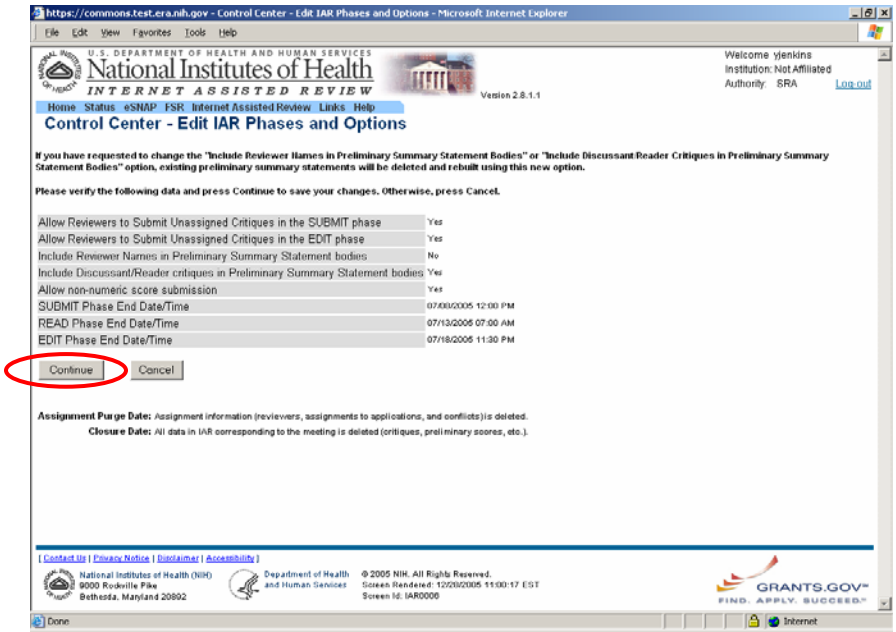


Figure 54: Verify the options that you have selected and click continue to confirm the submission

5. Click **Continue** to confirm the submission.

6. Select the **Back to Control Center** hypertext link to return to the **Control Center** screen

Meeting Materials

Overview

Materials that are necessary to conduct meetings can be added to the meeting details by SRAs/GTAs. Reviewers cannot add details to meeting materials, but are only able to view meeting materials.

Viewing Meeting Materials

To view meeting materials for a specific meeting:

1. Log in to IAR to access the **List of Meetings** screen as described in *Logging On To IAR* on page 2.

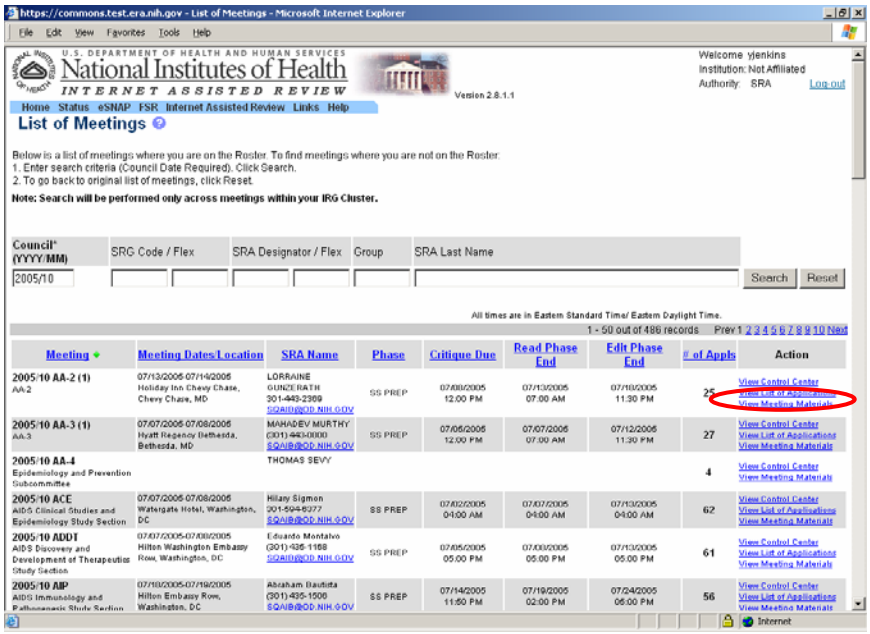


Figure 55: List of Meetings Screen (IAR0001)

2. Select the **View Meeting Materials** hypertext link, to access the **Meeting Materials** screen (Figure 56).

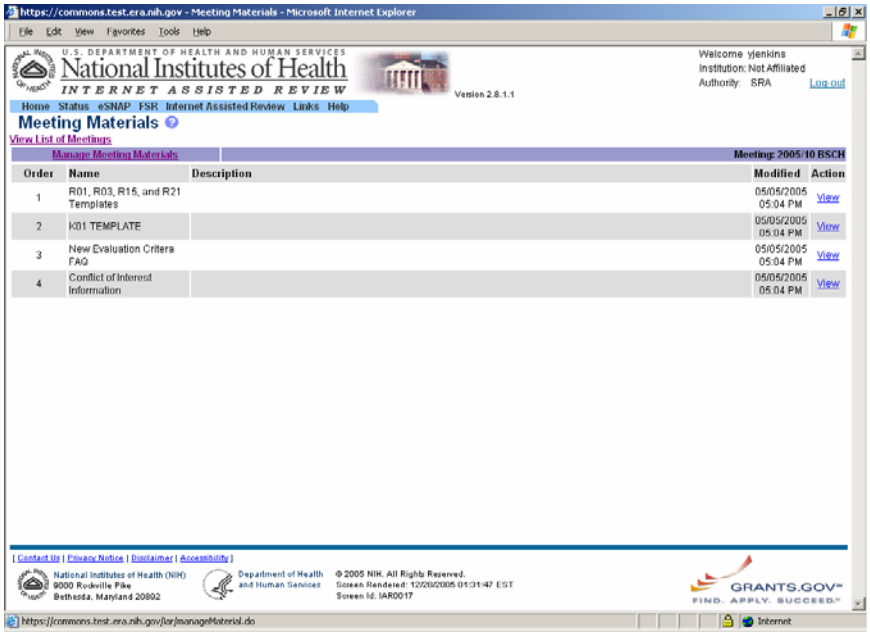


Figure 56: Meeting Materials Screen

3. To view details of any of the meeting materials select the **View** hypertext link in the **Action** column.

Managing Meeting Materials

To manage meeting materials:

1. Access the **Meeting Materials** screen as described in *Viewing Meeting Materials* on page 51.

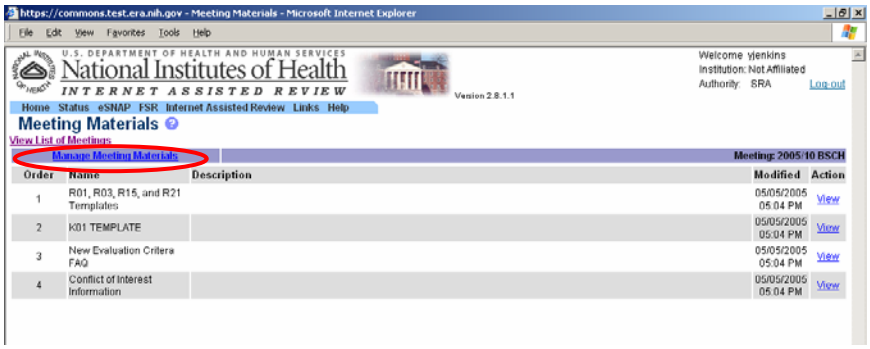


Figure 57: Meeting Materials Screen

2. Select the **Manage Meeting Materials** hypertext link. The **Manage Meeting Materials** screen appears (Figure 58).

Figure 58: Use the Manage Meeting Materials Screen to modify meeting material details

3. To modify the meeting material details, select the [**Edit**] hypertext link located in the **Action** column.

Add New Meeting Materials

To add new meeting materials to a meeting:

1. Access the **Manage Materials** screen as described in *Managing Meeting Materials* on page 52.

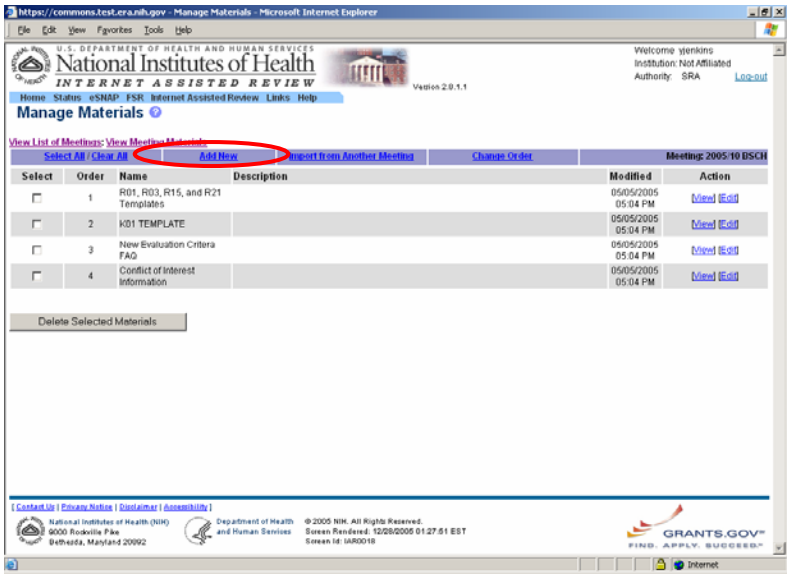


Figure 59: Select the Add New hypertext link to add new meeting materials to the selected meeting

2. Select the **Add New** hypertext link located at the top of the page (Figure 59). The **Add New Meeting Materials** screen appears.

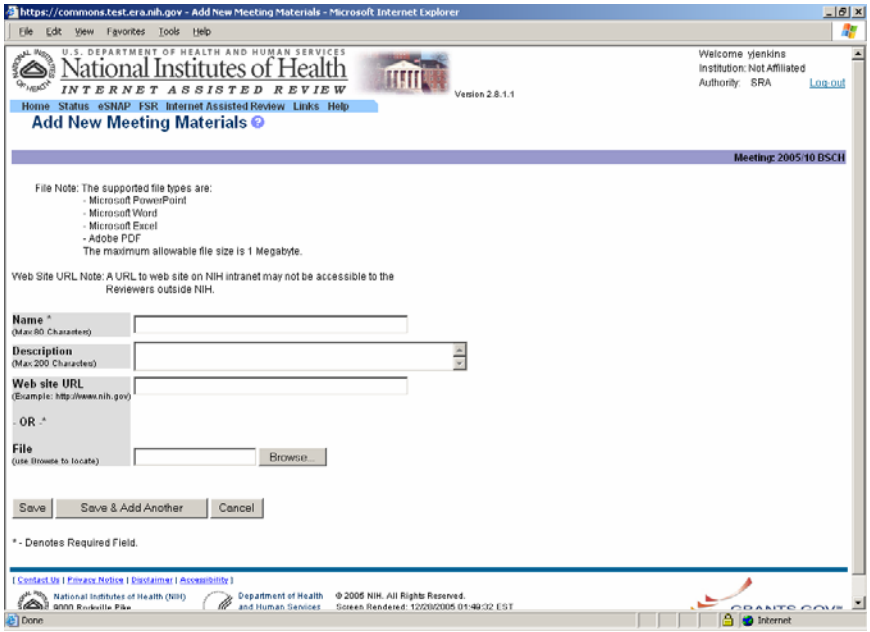


Figure 60: Click Save when you have added all of the necessary meeting materials

3. Type the name you would like to title the meeting material in the **Name** field. This is a required field.

4. Type a description of the material in the **Description** field.

5. Type the Web site URL or click **Browse** to select the file from a saved location. This is a required field.

6. If you have added all of the necessary meeting materials, click **Save**.

   If you need to add other meeting materials, click **Save & Add Another**.

Import Meeting Materials from another Meeting

To import meeting materials from another meeting:

1. Access the **Manage Materials** screen as described in *Managing Meeting Materials* on page 52.

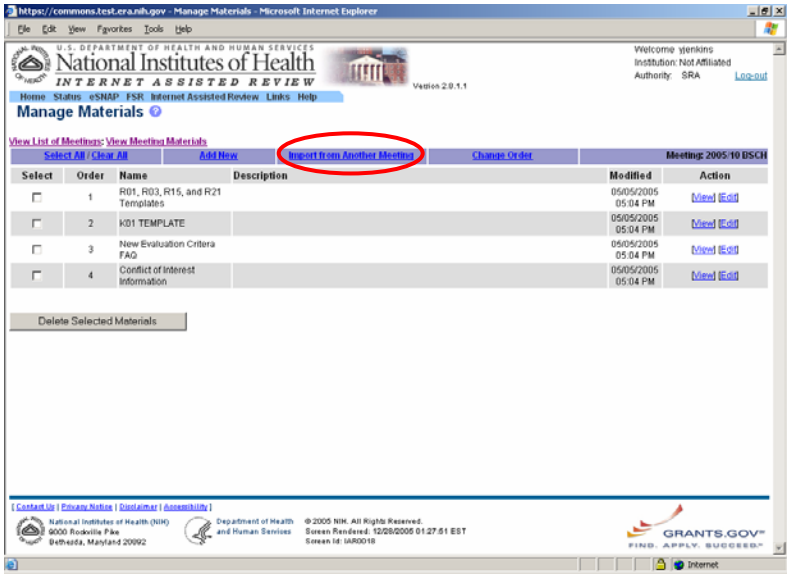


Figure 61:Select the Import from Another Meeting hypertext link to import meeting materials from a different meeting

2. Select the **Import from Another Meeting** hypertext link at the top of the page (Figure 61). The **Import Meeting Materials from Another Meeting** screen appears.

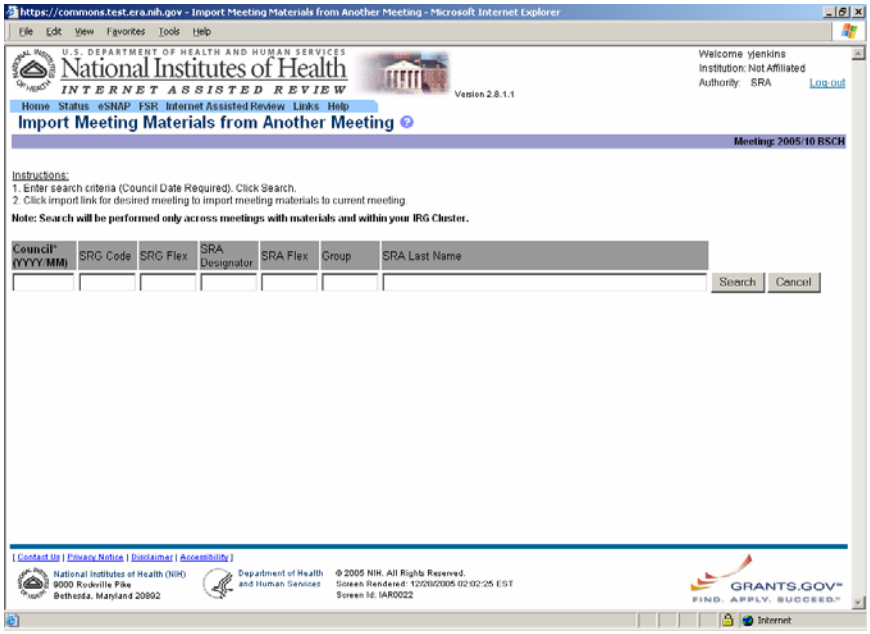


Figure 62: Import Meeting Materials from Another Meeting Screen

3. Enter the search criteria to locate the desired meeting. The Council Date is required.

4. Click **Search**. The meetings that are included in the specified search criteria appear (Figure 63).

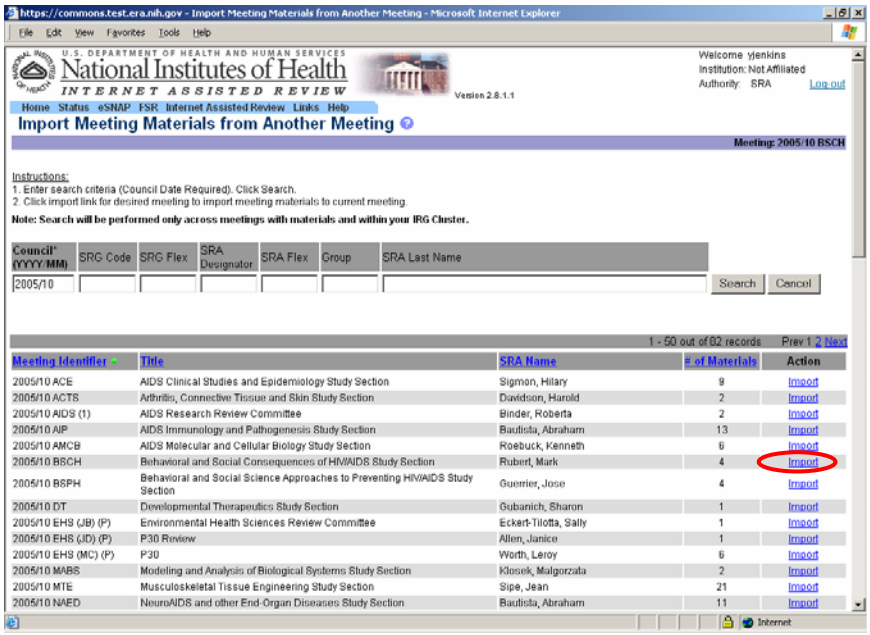


Figure 63: Select the meeting from which you would like to import materials from the list

5. Select the **Import** hypertext link from the **Action** column of the desired meeting. All of the meeting materials included in the selected meeting are imported, and you are returned to the **Manage Materials** screen.

Change the Order of Meeting Materials

To change the order of the meeting materials:

1. Access the **Manage Materials** screen as described in *Managing Meeting Materials* on page 52.

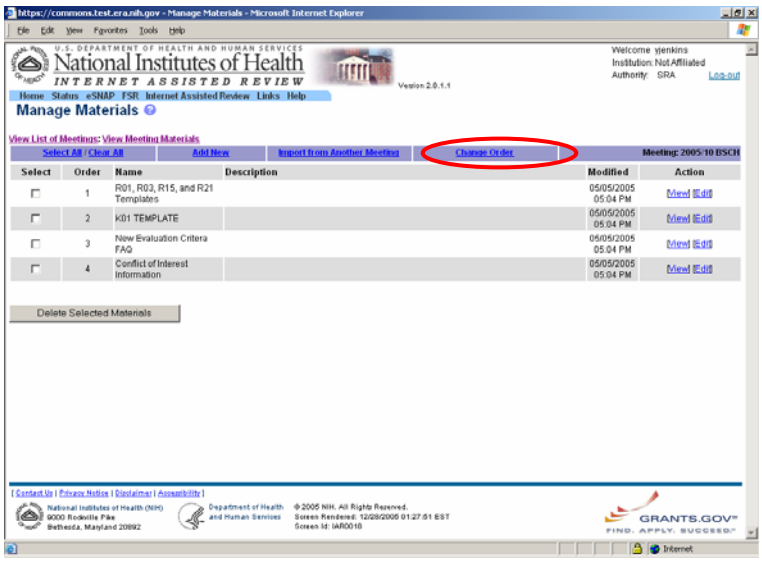


Figure 64: Select the Change Order hypertext link from the Manage Materials Screen

2. Select the **Change Order** hypertext link at the top of the page (Figure 64). The **Order List of Meeting Materials** screen appears.

Figure 65: Order List of Meeting Materials Screen

3. Make the necessary modifications to the list by changing the number located in the **Order** column so that it corresponds with the order that you desire for the specified material.

4. Click **Save** at the bottom of the screen. You are returned to the **Manage Materials** screen.

Reviewer Details

Overview

The information included here is written for reviewers, and will allow you to assist your reviewers in using the IAR system.

Creating/Accessing an IAR Account

In order to access IAR Reviewers must:

- have an NIH Commons account in order to access IAR
- be listed on the official Meeting Roster (the reviewer must be a real person with person_id, no placeholders)
- have an email address on their profile MLG

Your SRA/GTA grants you access to utilize IAR to submit and view critiques for applications in meetings. When this occurs, you receive an email informing you of your ability to access IAR. If you do not 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:

5. Click the hyperlink in the email to open the NIH eRA Commons and the Create New Account page.
6. 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.

7. 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 NIH eRA Commons Login page.

NOTE: To access IAR if you already have an IAR account or once you receive the notification email, see Introduction: *Logging On To IAR.*

Viewing Meeting Details

The List of Meetings page shows all the meetings that are assigned to a reviewer, when the meeting is in the *Read*, *Submit*, or *Edit* Phase. This is a display-only page; none of the information can be edited.

The meeting details listed on the **List of Meetings** screen is the same for both reviewers and SRAs/GTAs.

Viewing Application Details

The List of Applications allows reviewers to view information about the applications in their assigned meeting and also provides access to actions such as submitting and viewing critiques. The data viewed on the **List of Applications** screen is customized based on the current IAR phase and the type of reviewer. By default, the page initially shows only applications assigned to the reviewer but it provides access to show all applications in the meeting if the 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

IAR Phase Details

The IAR process included the following phases:

- **Submit**— Reviewers log in and submit critiques and preliminary scores for their applications. During this phase you only see your assigned applications. The phase end date is the Critique due date.
- **Read**—Time period after the Submit phase (the Submit phase end date determines the start of the Read Phase). After submission deadline, Reviewers may read other Reviewer's critiques. If a reviewer has not submitted, the SRA may block the Reviewer from reading until he submits his own. During the Read phase, except where in conflict or blocked, you can see all applications and may read all critiques. At the end of the Read phase, the actual meeting is usually held.
- **Edit**—The SRA/GTA determines whether or not to hold the optional Edit Phase which follows the Read phase. In this phase, you can correct/resubmit your 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, you will lose access to the meeting. 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. Telephone reviewers, can see all meeting applications and are able to view critiques submitted by other reviewers.

Note:
Mail reviewers can only see their own assigned applications.

By default, reviewers 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.

Submitting Critiques/Scores

Reviewers can submit critiques and scores for their 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.

Viewing Critiques

A reviewer's ability to view critiques depends upon the type of reviewer assignment that they hold, as well as the current IAR phase of the meeting. Critiques cannot be modified during the *Read* Phase and reviewers are not able to view critiques and scores for applications where a conflict of interest exists. 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, reviewers can usually view critiques posted by other reviewers to assist them in preparing for review meeting discussions. However, if a critique has not been submitted during the *Submit* phase the SRA/GTA can block the reviewer from reading other critiques until that reviewer has submitted their own critique. If a reviewer is blocked from reading, a critique must be submitted before other critiques can be read.

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

Mail reviewers—Mail reviewer are not able to view critiques that are submitted by other reviewers.

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

During the Read Phase, mail reviewers 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

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.

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. A reviewer's ability to view the Score Matrix page depends upon the type of reviewer assignment that they hold as well as the current IAR phase. 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 a regular reviewer is blocked by a SRA/GTA from reading critiques for applications where you haven't yet submitted a critique, they 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—These reviewers can only view their own assignments in the Score Matrix page.

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

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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