



Electronic Council Book (ECB) for Council Members User Guide

October 22, 2024

NOTE: This user guide is an identical PDF version of the online help.

Contact Us

Additional Help Needed? Please contact the eRA Service Desk (<https://www.era.nih.gov/need-help>).

Toll-free: 1-866-504-9552; **Phone:** 301-402-7469

Hours: Mon-Fri, 7:00 a.m. to 8:00 p.m. Eastern Time

Feedback on the user guide? Please email the eRA Communications Office (era-communications@mail.nih.gov).

Disclaimer STATEMENT

No data shown in illustrations represents any real account, project, or individual. Any resemblance to actual accounts, projects, or individuals is purely coincidental.

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Navigating and Using the UI in eRA Modules

For increased usability, eRA modules are gradually switching to a streamlined, modern look and feel for screens. The new look and the new navigation adjust dynamically for a variety of screen or font sizes, making your browsing experience more efficient on the device of your choice. New UI elements offer a consistent set of tools that you can use across modules. A new header and footer conserve space, leaving more work area for you to accomplish your tasks.

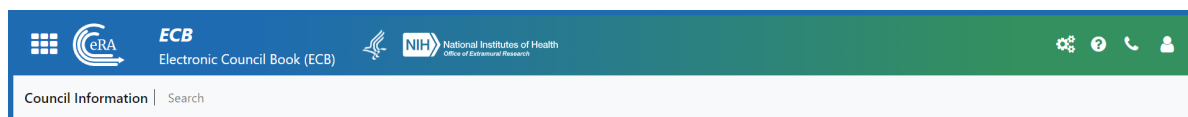
This topic explores the new navigation and UI elements that you might see on updated screens. All modules will eventually use the same framework for building the UI and navigation through screens. Older style screens will co-exist with updated screens during the transition to the new look and feel.

Read this topic to learn about:

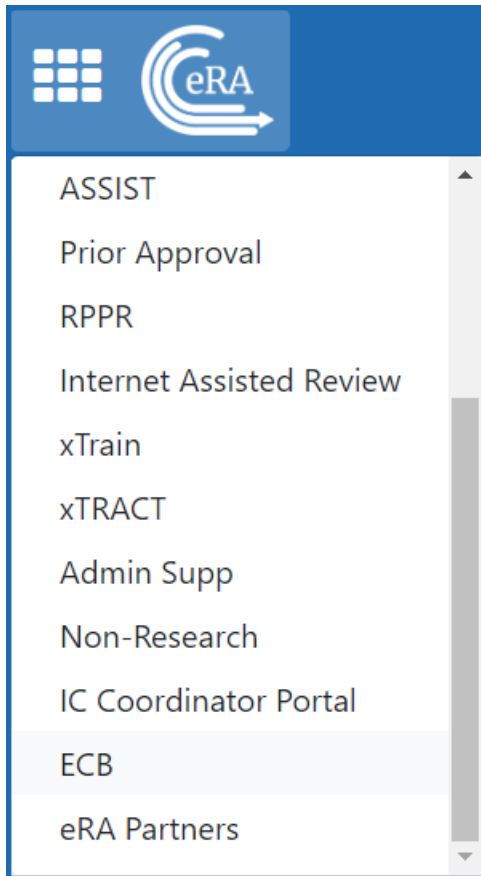
- Header/footer for eRA modules
- Navigation to and within modules
- Three-dot ellipsis button
- Standard tools for tables
- How columns are hidden and shown on small screens

Header and Footer Navigation

The header and footer use symbols to save screen real estate and dynamically adjust to fit smaller screens.



The first icon from left is the Apps menu. The Apps menu shows all apps available to the currently logged-in user, shown below:



Other Icons in Header



Links to the Department of Health and Human Services.



Links to grants.nih.gov.



IC selector. Users with multiple ICs can select an IC here.



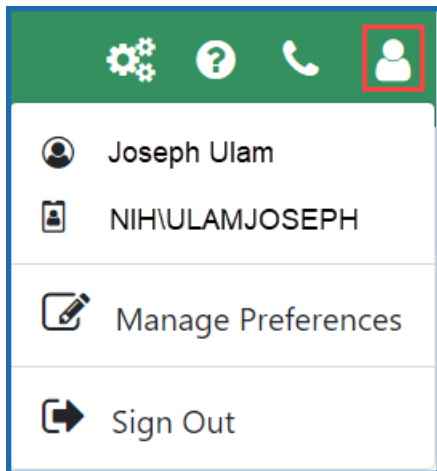
Links to a general eRA Service Desk Support page.



Links to eRA Points of Contact page.

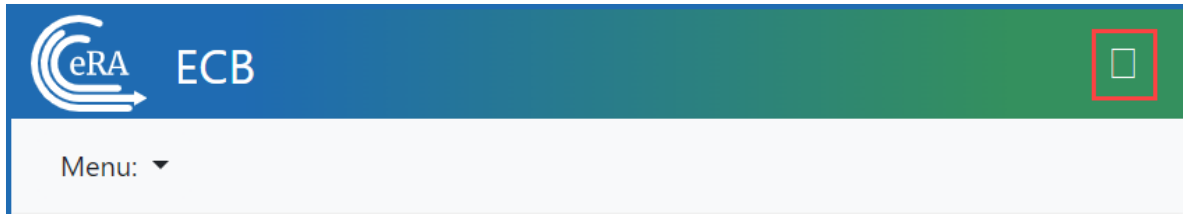


The person icon shows your login information, preferences, and sign out link:



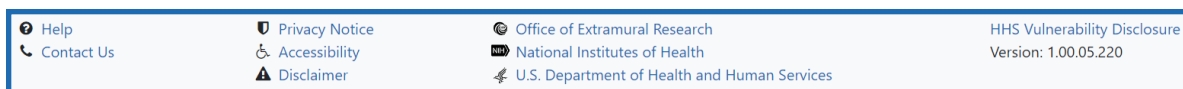
Dynamic Header

Below, on a narrow screen, most items on the header are hidden, but they pop down when you click the icon in the upper right, indicated below. The ECB toolbar is available by clicking the Menu drop-down on the left side of the screen.



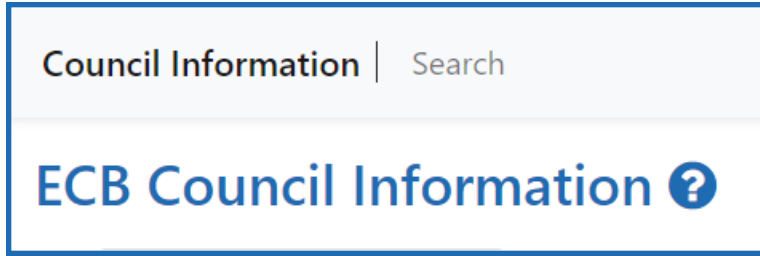
Redesigned Footer

The footer is clean and offers only essential information organized into columns.




Navigating Within a Module

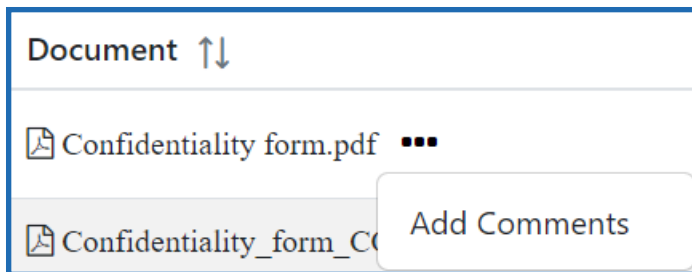
The screen title lets you quickly see which page you are viewing.



The sections of the modules are listed across the top of the screen. To navigate to another screen, click the screen name on the toolbar.

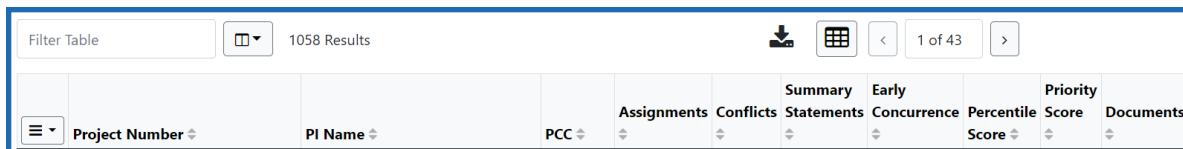
Three-dot ellipsis button

Actions that are available for each row in a table are displayed under the  **three-dot ellipsis** button, as shown below.



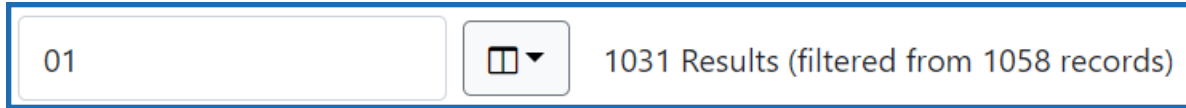
Standard Tools for Tables

Tables are sleeker with tools for showing the data you want to see. See below for explanations of table tools.



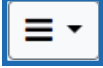
Filter

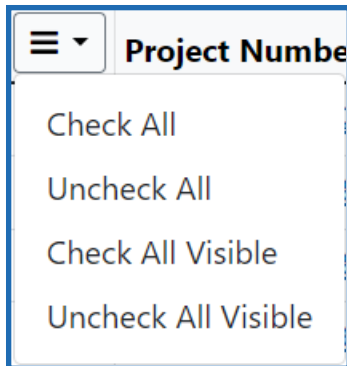
Entering filter text features instant filtering of the list as you type, with the number of found results updated as you type. The text you type in the filter is highlighted in the table.



Filterable fields vary on each page, but typically include Project Number, PI Name, and other text-based fields.

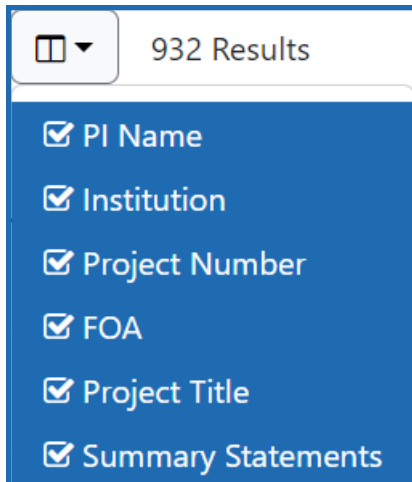
Selecting Rows/Bulk Action Tool

Use the bulk actions tool  to select or deselect all rows on all pages, or to select or deselect all rows that are currently visible, such as those found by typing filter text or all rows on the current page.



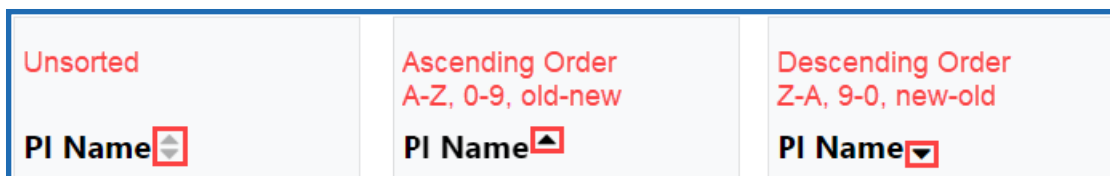
Column Picker

Click to choose the visible columns in a table by selecting/deselecting their checkboxes using the column picker tool. The column selection is only in effect until the screen is refreshed.



Column Sorting

Click a column header to sort by that column.



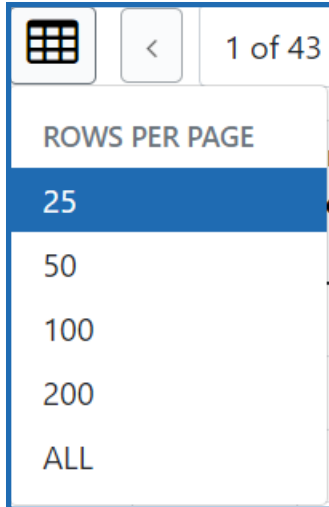
Download and Print

Use the download tool, shown below, to export table data to Excel.



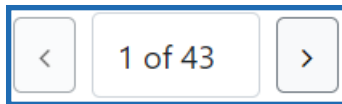
Rows Per Page

To help avoid scrolling, use the Rows Per Page tool to specify how many table rows appear per page.



Page Navigation

Navigate to each page of search results using the following tool:



You may also click the **X of Y** field to display a drop-down that allows you to jump to a certain page.

Latest Updates

October 22, 2024

The following topics have been updated:

ECB for Agency Staff

- *Electronic Council Book Home Page*
- *Managing Conflicts*
- *Council Information Page*
- *Early Concurrence Panels screen*
- *Manage Council Members Screen*
- *Manage Lists/Categories Screen*
- *Reports Screen*
- *Searching for Applications*
- *Project Search Result Screen*
- *Voting Details Screen*

ECB for Council Members

- *List Screen on page 31*

August 30, 2024

The following topics have been updated:

ECB for Agency Staff

- *Searching for Applications*
- *ECB Roles*

August 23, 2024

The following topics have been updated:

ECB for Agency Staff

- *Searching for Applications*
- *ECB Roles*

July 30, 2024

The following topics have been updated:

ECB for Agency Staff

- *Application Lists*
- *Small Business Fundable Lists*
- *Reports Screen*

July 11, 2024

The following topics have been updated:

ECB for Agency Staff

- *Electronic Council Book Home Page*
- *Searching for Applications*
- *Application Actions*
- *Manage Lists/Categories Screen*
- *Early Concurrence Panels screen*
- *Voting Details Screen*
- *Council Information Page*

- *List Screen*
- *Manage Council Members Screen*

June 17, 2024

The following topics have been updated:

ECB for Agency Staff

- *Searching for Applications*
- *Council Information Page*
- *Reports Screen*

April 30, 2024

ECB for Agency Staff

- [Council Sweep](#) has been moved into the ECB module.
- The [Correspondence](#) topic was added for NIAID users.
- The [Manage Council Members Screen](#) topic was updated with council round rollover dates.

April 4, 2024

ECB for Agency Staff

The *Navigating and Using the UI in eRA Modules* topic was updated to reflect additional fields that can be added to search results.

The following pages were updated to reflect changes to application conflicts:

- *Application Actions*
- *Managing Conflicts*
- *Searching for Applications*

ECB for Council Members

The following pages were updated to reflect changes to application conflicts:

- *Early Concurrence Panel Screen* on page 25
- *List Screen* on page 31

March 5, 2024

This online help has been newly created for the redesigned ECB.

For pilot users, the following topics have been updated:

ECB for Agency Staff

- *Searching for Applications*
- *Reports Screen*
- *Application Lists*
- *Manage Lists/Categories Screen*
- *Council Information Page*
- *Manage Council Members Screen*

ECB for Council Members

- *Initial ECB Login Screens* on page 21
- *List Screen* on page 31
- *Searching for Applications* on page 39
- *Early Concurrence Panel Screen* on page 25

January 22, 2024

The following topics have been updated:

ECB for Agency Staff

- *Searching for Applications*
- *Managing Conflicts*
- *Early Concurrence Panels screen*
- *Council Information Page*
- *Manage Council Members Screen*
- *Reports Screen*

ECB for Council Members

- *Initial ECB Login Screens on page 21*
- *Early Concurrence Panel Screen on page 25*
- *List Screen on page 31*

October 31, 2023

The following topics have been updated:

ECB for Agency Staff

- *Navigating and Using the UI in eRA Modules*
- *Searching for Applications*
- *Application Lists*
- *Document Lists*
- *Managing Conflicts*
- *Early Concurrence Panels screen*
- *Council Information Page*
- *Manage Council Members Screen*

ECB for Council Members

- *Navigating and Using the UI in eRA Modules* on page 6 s
- *Early Concurrence Panel Screen* on page 25

July 14, 2023

Online help created for ECB redesign

Accessing the Electronic Council Book (ECB) Module

ECB Account and Password Management

The new ECB process for account and password management for a council member is as follows:

1. An ECB administrator adds a member to a council using the Manage Council Member screen's person search feature in ECB.
2. The ECB administrator invites the member to serve on the council.
3. If an existing eRA Commons account is found for the person, they receive an email informing them of their invitation to the council.
4. If no eRA Commons account is found, the invitee receives an email asking them to create an eRA Commons account. The invitee clicks a link in the email and creates an account, following the online instructions.
5. The new eRA account holder logs in at <https://public.era.nih.gov/commons/>, is prompted to change their password, then logs in again with the newly changed password.
6. The new council member electronically agrees to necessary acknowledgments, such as responsibilities in protecting peer review, confidentiality, and conflict of interest forms, whereupon they land on the council information screen in ECB.

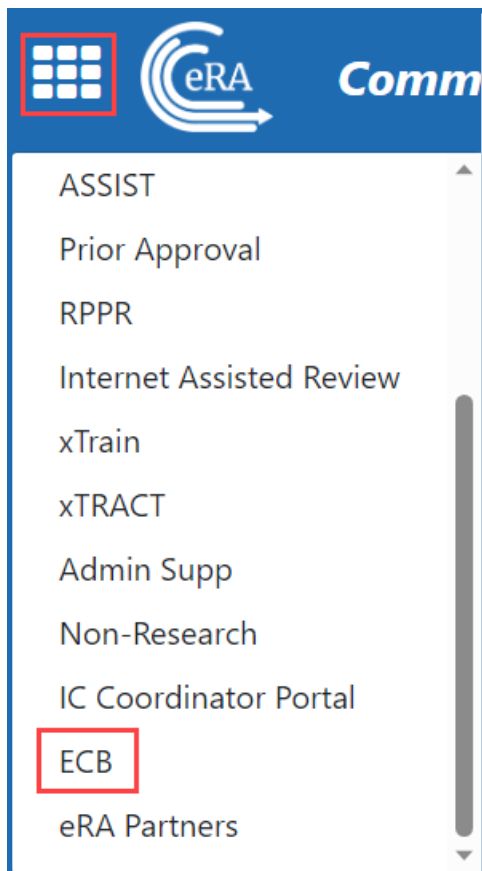
Any password management (reset password, forgot password) that is needed is performed by the council member using eRA's built-in account and password management features. For information on password management in eRA Commons, see [Password Policy](#) in Commons online help.

See the eRA Commons online help for details on accessing eRA Commons and obtaining a Commons user account. Look for sections on:

- [About eRA Commons](#)
- [Logging into eRA Commons](#)
- [Welcome to eRA Commons](#)

Accessing ECB

1. Log in to eRA Commons at <https://public.era.nih.gov/commons/>. See <https://era.nih.gov/erahelp/commons/#Commons/access/login.htm> for complete details.
2. Once logged in to eRA Commons, click the **Apps** menu and select **ECB**.



When you access ECB, the system displays the *Council Information Screen* on page 23.

Initial ECB Login Screens

Before every council round, on your first login to ECB, you are presented with informational screens. You must read and agree to the information before you can access ECB.

Agency-Specific Instructions:

NTP users: These screens are not displayed on initial login. You are instead taken directly to the [Council Information Page](#).

SAMHSA users: These screens are not displayed on initial login. You are instead taken directly to the [Council Information Page](#).

1. First, the *Responsibilities of National Advisory Council Members in Protecting NIH Peer Review* screen is displayed. Read the screen and click the **Continue** button.

**Responsibilities of National Advisory Council Members
in Protecting NIH Peer Review**

The core values of NIH Peer review are (1) expert assessment, (2) transparency, (3) impartiality, (4) fairness, (5) confidentiality, (6) security, (7) integrity, and (8) efficiency. These values drive NIH to seek the highest level of scientific and ethical standards, and form the foundation for the laws, regulations, and policies that govern the NIH peer review process.

While all the core values are important and are due proper recognition, the NIH has growing concerns about peer review confidentiality, security, and integrity. These concerns arise from various breaches of review integrity, including the sharing of confidential information by reviewers, inappropriate influence by foreign governments over federally funded research, and other inappropriate behaviors. Therefore, we provide these important reminders for all NIH Advisory Council members.

Responsibilities. As an NIH Advisory Council member, you are responsible for:

- Reading and signing a confidentiality and nondisclosure certification, before gaining access to applications or proposals.
- Abiding by the Confidentiality and Nondisclosure Rules for National Advisory Council members.
- Maintaining passwords to the Electronic Council Book (ECB) in strictest confidence and sharing them with NO ONE.
- Fully and accurately completing all financial and other reporting requirements.
- Keeping review materials in secure locations at all times.
- Reporting to NIH officials* **IMMEDIATELY** and **IN STRICTEST CONFIDENCE**:
 - Lost or stolen passwords or confidential material.
 - Any real or potential breaches of review integrity (e.g., undisclosed conflicts of interest, breaches of confidentiality, inappropriate attempts to manipulate the Council review process)
 - Any real or potential breaches of security (e.g., Council members sharing passwords or disclosing records outside the secured systems).

Possible Consequences. The NIH may take steps in response to a violation of the confidentiality and nondisclosure agreement, the conflict of interest certifications, and financial disclosures, in order to preserve the integrity of the NIH review process. Depending on the specific circumstances, such steps may include but not be limited to:

- Notifying or requesting information from a member's institution.
- Terminating a member's service.
- Withdrawing or deferring an application for later review.
- Notifying the NIH Office of Management Assessment (OMA) with possible referral to the U.S. Department of Health and Human Services Office of Inspector General (OIG) and other federal partners, as appropriate.
- Pursuing a referral to the HHS Suspension and Debarment Official for initiation of government-wide suspension or debarment proceedings.

***Contact Information:** To report a breach of confidentiality, security, or integrity, or to request additional information, please contact:

- The Executive Secretary managing the Advisory Council meeting.
- The NIH Review Policy Officer (ReviewPolicyOfficer@NIH.gov).

[Continue](#)

2. Next, the *Confidentiality and Nondisclosure Rules: Information for Special Government Employees Evaluating NIH Grant Applications* screen is displayed. Read the screen and click the **I agree** button.

**Confidentiality and Nondisclosure Rules:
Information for Special Government Employees
Evaluating NIH Grant Applications**

Rules related to the confidentiality of information disclosed to advisory committee members in the course of NIH peer review *prohibit* a Special Government Employee serving on an NIH Advisory Council or Board from, among other actions:

- Sharing applications or meeting materials with anyone who has not been officially designated to participate in that Council meeting, including but not limited to colleagues, lab members, fellows, students, and applicant investigators, through any communication channel (including social media) or unapproved third-party platform (including artificial intelligence technology) except as authorized by the Designated Federal Officer (DFO) or other designated NIH official.
- Granting anyone who has not been officially designated to participate in that Council meeting access to any NIH secure computer system or advisory committee meeting, using his or her password or credentials, or through shared communication.
- Disclosing, in any manner, information about the Council deliberations, discussions, evaluations, or documents pertaining to the closed session of a Council meeting to anyone who has not been officially designated to participate in that Council meeting, including but not limited to a colleague, lab member, fellow, student, or applicant investigator, through any communication channel (including social media) or unapproved third-party platform (including artificial intelligence technology) other than as authorized during or for the Council meeting.
- Disclosing, in any manner, information about the Council deliberations, discussions, or evaluations related to an application to another Council member who has a real or apparent conflict of interest with that application.
- Contacting an applicant organization or individual listed on an application for additional information about the project or application.
- Using information contained in an application for his/her personal benefit or making such information available for the personal benefit of any other individual or organization.
- Participating in NIH peer review without certifying a confidentiality agreement, below.

The NIH may take steps to ensure compliance with the rules above, and the integrity of the peer review process; depending on the specific circumstances, such steps may include but not be limited to:

- Notifying or requesting information from a Special Government Employee's institution.
- Disciplinary action.
- Termination of the Special Government Employee's service.
- Notifying the NIH Office of Management Assessment with possible referral to the U.S. Department of Health and Human Services Office of Inspector General.

Confidentiality Agreement

I certify that I have read, and understand, the "NIH Confidentiality and Non-Disclosure Rules: Information for Special Government Employees Evaluating NIH Grant Applications" above. With the understanding that any materially false, fictitious, or fraudulent statement or representation may subject me to criminal, civil, or administrative penalties (18 USC 1001), I certify that I fully understand the confidential nature of the NIH peer review process, and agree:

1. To destroy, delete, and/or return all materials related to applications, associated materials made available to Council, Council members' evaluations, and discussions during closed sessions of the Council meeting;
2. Not to grant anyone who has not been officially designated to participate in this Council meeting access to any NIH secure computer system or advisory committee meeting
3. Not to disclose or discuss the applications, associated materials made available to Council members, Council members' evaluations, and discussions during closed sessions of Council meetings with any other individual or third-party platform except as authorized by the Council Executive Secretary or other designated NIH official;
4. Not to disclose information about the Council deliberations, discussions, or evaluations related to an application to another Council member who has a real or apparent conflict of interest;
5. Not to contact an applicant organization or individual listed on an application for additional information about the project or application;
6. Not to use information contained in an application for my personal benefit or make such information available for the personal benefit of any other individual or organization;
7. To refer all inquiries concerning the Council meeting, including inquiries related to these Confidentiality and Nondisclosure Rules and/or Agreement, to the Advisory Council Executive Secretary or other designated NIH official.

3. Last, the *Certification Regarding Conflict of Interest* screen is displayed. Read the screen and click the **I agree** button.

CERTIFICATION REGARDING CONFLICT OF INTEREST

While using this site, I will avoid real and apparent conflicts of interest by not accessing evaluations of applications, proposals, and projects involving organizations:

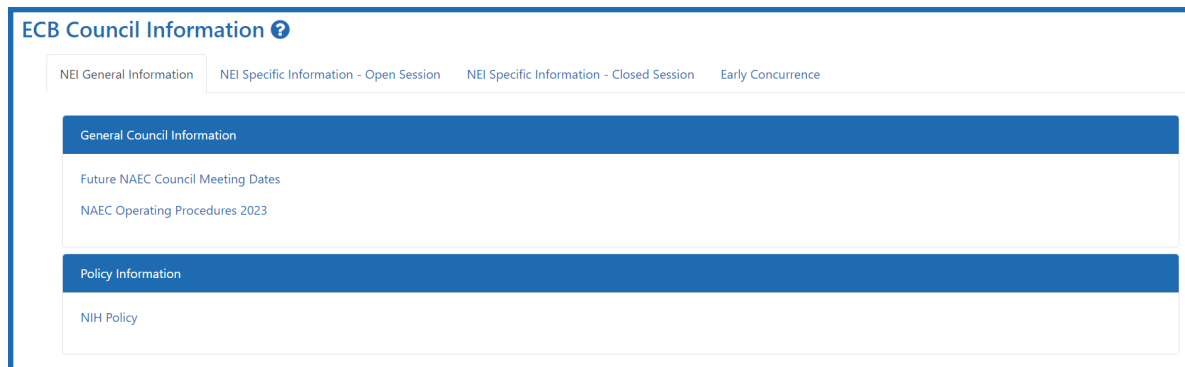
1. if to the best of my knowledge and belief, I or my spouse, minor child, or partner have a financial interest;
2. where I am, am seeking to be, or have recently been an officer, director, trustee, owner, partner, expert consultant, advisor, (with or without compensation) or employee or otherwise similarly associated;
3. where there exists any arrangement concerning my prospective employment or in which I am an active participant;
4. where my spouse, parent, or dependent child serves or seeks to serve as officer, director, trustee, general partner, agent, consultant, employee or similar.

I will further avoid any actions that might give the appearance that a conflict of interest exists or could reasonably be viewed as affecting my objectivity.

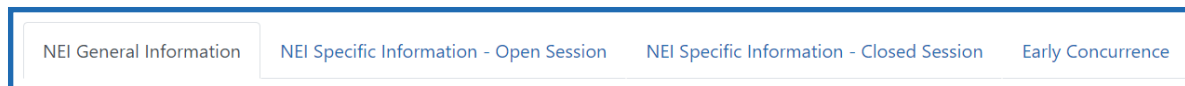
The date and time of your agreements are logged in ECB and the screens will not be displayed again within the same council round.

Council Information Screen

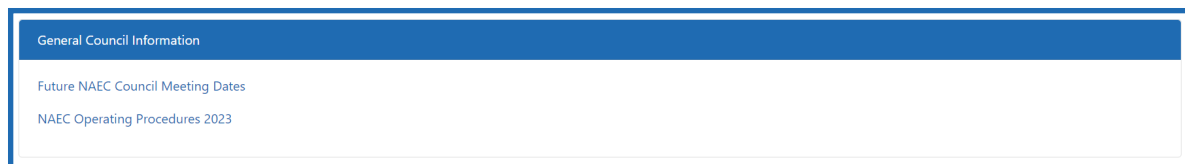
The ECB Council Information screen is the landing page for council members. Each council round, a new Council Information page is set up; these pages can consist of tabs, sections, subsections, text, links, and documents.



Tabs are available at the top of the screen. The active tab is indicated with a tab outline. Click a hyperlinked tab name to view the tab.





Sections are contained within tabs. Each section consists of a blue header and text-based content within a frame.



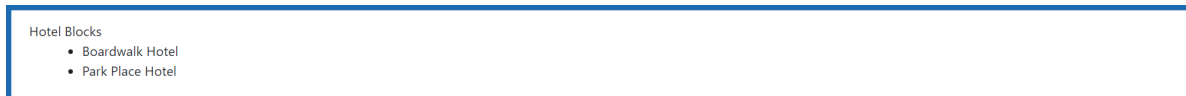
Expanding and collapsing sections

If you are viewing a Council Information Page that contains a considerable amount of information, you may wish to expand and collapse the sections to ease navigation.

1. To expand or collapse all sections at once, click the **Expand/Collapse All** button at the top of the screen.

2. To expand an individual section, click the  **Expand** button on the right side of the section header.
3. To collapse an individual section, click the  **Collapse** button on the right side of the section header.

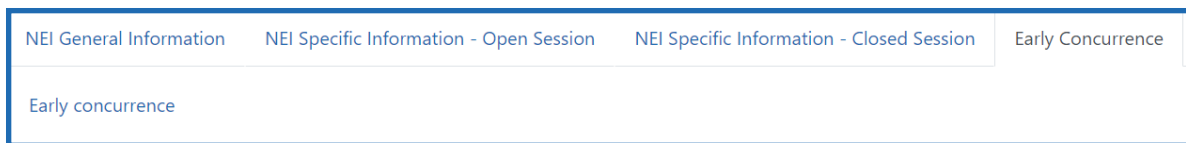
Subsections are contained within tabs or sections. Each subsection consists of a header and text-based content



Text is contained within a tab, section, or subsection. It consists of text, images, bullets, numbers, and other formatted text.



Links are contained within a tab, section, or subsection. When clicked, they open a new screen containing an application list, document list, category, EC panel, or web page.



Documents are contained within a tab, section, or subsection. Documents can be viewed and voted on.



Early Concurrence Panel Screen

The Council Information screen contains links to early concurrence panels. When clicked, the links open the early concurrence panel screen. It contains a list of applications that have been added to the early concurrence panel, voting radio buttons, conflict check-boxes, and buttons to download summary statements, view panel members, save self-identified conflicts, and clear, save, and submit votes.

NOTE: Grayed out selections in the voting columns (e.g., row 1 below) indicate votes that have been submitted and cannot be changed.

Darker selections in the voting columns (e.g., row 2 below) indicate unsubmitted votes that can be changed.

Project Number	PI Name	Yes	No	Abstain	Conflict	Project Title	Percentile Score	Priority Score	PCC	Institution
1DP2OD345678-01	CURIE, MARIE	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	Long-Term Effects of Radium Exposure on Nearby Inhabitants				UNIVERSITY OF CALIFORNIA, SAN FRANCISCO
1R23GM456789-01	FRANKLIN, ROSALIND	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	X-Ray Crystallography and the Molecular Structure of DNA			B231CL	UNIVERSITY OF CONNECTICUT STORRS
1R23GM789456-01	PASTEUR, LOUIS	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	Rabies vaccination post-exposure			B120HN	MEDICAL UNIVERSITY OF SOUTH CAROLINA

Filtering the application list

There are two options you can use to filter the application list: the Special Codes drop-down and the Filter Table field.

- To filter for applications that have a special code applied, click the **Special Codes** drop-down in the upper-left corner of the screen and select the appropriate code. The table is filtered to display applications with that code. Click the **X** to clear the filter.
- To filter applications by any of the text fields displayed in the table, enter the text in the **Filter Table** field. The table is filtered to display applications containing that text. Click the **X** to clear the filter.

Sorting the application list

Click a column header to sort by that column.




Downloading all available application summary statements

1. Click the **Download Summary Statements** button to download the summary statements for all applications where it is available. The summary statements are opened in a new tab.

Viewing an application summary statement

1. Click the hyperlinked project number to view the summary statement in a new tab.

Viewing an application image

If the  **Application Image** icon is visible, click it to view the E-application in a new tab.

Viewing panel members

1. Click the **Panel Members** button. The Panel Members screen is displayed.
2. Click the **Close** button to return to the early concurrence panel screen.

Selecting conflicts






If you have a conflict with a person or organization involved in a application, you can add a conflict in the early concurrence panel screen.

1. Click the **Conflict** checkbox for the appropriate application.

2. Click the **Save Conflicts** button at the top of the screen. A confirmation screen is displayed.
3. Click the **Yes** button. The conflict is saved and you will not be able to vote on that application or any applications for that FOA.

Adding Comments

If comments are allowed when an early concurrence panel is created, you may add comments to each application.

1. Click the  three-dot ellipsis for the application and select **Add Comments**. The Add Comments screen is displayed.
2. Enter your comments in the **Comments** field.
3. Click the **Save** button. Your comments are added to the record, as indicated by the  **Comments** icon next to the project number.
4. Click the  **Expand** button for the record, then click the  **Expand** button for the *Comments* pane to view your comment.
5. To edit your comment, click the  **Edit** button.

Voting on Applications individually

Agency-Specific Instructions: SAMHSA users cannot vote on applications individually.

1. Select the radio buttons for **Yes**, **No**, and/or **Abstain** as appropriate for each application in the list.
2. Click the **Save Progress** button to save the votes. You may return to saved votes and change them later if you wish.

3. If you are ready to finalize the votes, click the **Submit Vote** button to submit the votes. You will not be able to change the votes once submitted. A confirmation screen is displayed. Click the **Yes** button to submit the votes.

IMPORTANT: If voting closes while you have saved but not submitted votes, the votes will not be counted.

Voting on Applications globally

If you wish to vote the same way for all applications in the early concurrence panel, you may do so without selecting the votes individually.

IMPORTANT: If you have saved but unsubmitted votes, they will be overridden by the **Vote All** options. If you do not wish to override these votes, click the **Vote and Submit** button to submit them first.

1. Click the **Vote Options** button in the upper-right corner of the screen and select the appropriate option.
 - a. **Vote Yes All** selects the **Yes** radio button for all applications in the list for which votes have not been submitted.
 - b. **Vote No All** selects the **No** radio button for all applications in the list for which votes have not been submitted.
 - c. **Vote Abstain All** selects the **Abstain** radio button for all applications in the list for which votes have not been submitted.

Agency-Specific Instructions: SAMHSA users do not have an Abstain option.

2. Click the **Save Progress** button to save the votes. You may return to saved votes and change them later if you wish.
3. If you are ready to finalize the votes, click the **Submit Vote** button to submit the votes. You will not be able to change the votes once submitted. A confirmation screen is displayed. Click the **Yes** button to submit the votes.

IMPORTANT: If voting closes while you have saved but not submitted votes, the votes will not be counted.

Clearing Saved Votes

If you wish to clear all saved but unsubmitted votes and start fresh, you may do so.

NOTE: Submitted votes cannot be cleared or changed.

1. Click the **Clear Votes** link at the top of the screen. A confirmation screen is displayed.
2. Click the **Yes** button. All saved but unsubmitted votes are cleared.

Returning to the Council Information screen

1. Click the **Cancel/Go back** link at the top of the screen. You are returned to the first tab of the Council Information screen.
-

IMPORTANT: Note that you will lose any unsaved votes when you go back to the Council Information screen. Click the **Save** button first to avoid this.

Category Screen

The Council Information screen contains links to categories. When clicked, the links open the category screen. It contains a panel of the lists within that category; when a list is selected, the documents or applications in the list are displayed, along with voting radio buttons, and buttons to clear, save, and submit votes.

The screenshot shows the 'RealtimeAppIsCategory' interface. On the left, there is a 'Lists' sidebar with 'AppList' selected. The main area is titled 'AppList' and contains a search bar, a 'Filter Table' dropdown, and a '21 Results' indicator. Below this is a table with the following columns: Conflict, Project Number, PI Name, Project Title, Percentile Score, Priority Score, PCC, Institution, Yes, No, and Abstain. Two rows are visible in the table:

Conflict	Project Number	PI Name	Project Title	Percentile Score	Priority Score	PCC	Institution	Yes	No	Abstain
<input type="checkbox"/>	1DP2OD345678-01	CURIE, MARIE	Long-Term Effects of Radium Exposure on Nearby Inhabitants			2L /TDG	UNIVERSITY OF PARIS	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="checkbox"/>	1R23OD567890-01	FRANKLIN, ROSALIND	X-Ray Crystallography and the Molecular Structure of DNA	35		2L /TDG	UNIVERSITY OF CAMBRIDGE	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Displaying a category list

- To display a list in the category, click its name in the **Lists** pane on the left side of the screen. The applications or documents in the category are displayed on the right side of the screen.

Voting on a list

- Refer to the *List Screen* on page 31 topic for information on reviewing and voting on applications and documents.

List Screen

The Council Information screen contains links to document and application lists. When clicked, the links open the list screen. It contains a list of documents or applications, voting radio buttons, and buttons to clear, save, and submit votes.

NOTE: If the buttons are not visible at the top of the screen, you are not part of the voting panel for the list. You may view the documents or applications, but you cannot vote.


Document ↑↓	Approve ↑↓	Approve with Modifications ↑↓	Defer with further Information ↑↓	Disapproved ↑↓	Abstain ↑↓	Date ↑↓
Confidentiality form.pdf ***	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	07/06/2023
Confidentiality_form_COI_cert.pdf ***	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	07/06/2023
Conflict of Interest.pdf ***	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	07/06/2023

Figure 1: Document List for which you are a voting member

Conflict ↑↓	Project Number ↑↓	PI Name ↑↓	Project Title ↑↓	Percentile Score ↑↓	Priority Score ↑↓	PCC ↑↓	Institution ↑↓	Yes ↑↓	No ↑↓	Abstain ↑↓
<input type="checkbox"/>	1R01EY234567-01	CURIE, MARIE	Long-Term Effects of Radium Exposure on Nearby Inhabitants			2C /GAM	UNIVERSITY OF PARIS	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="checkbox"/>	1K23EY456789-01	FRANKLIN, ROSALIND	X-Ray Crystallography and the Molecular Structure of DNA				UNIVERSITY OF CAMBRIDGE	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Figure 2: Application List for which you are not a voting member

Viewing application or document details

1. Click the  **Expand** button to view more information about the application or document.


Viewing a document

1. To view a document, click its title. The document is opened in a new screen.

Viewing the application summary statement

1. Click the hyperlinked project number to view the summary statement.

Viewing the application image

1. If the  **Application Image** icon is visible, click it to view the E-application in a new tab.




Selecting conflicts




If you have a conflict with a person or organization involved in a application, you can add a conflict in the early concurrence panel screen.

1. Click the **Conflict** checkbox for the appropriate application.
2. Click the **Save Conflicts** button at the top of the screen. A confirmation screen is displayed.
3. Click the **Yes** button. The conflict is saved and you will not be able to vote on that application or any applications for that FOA

Adding comments on a document or application

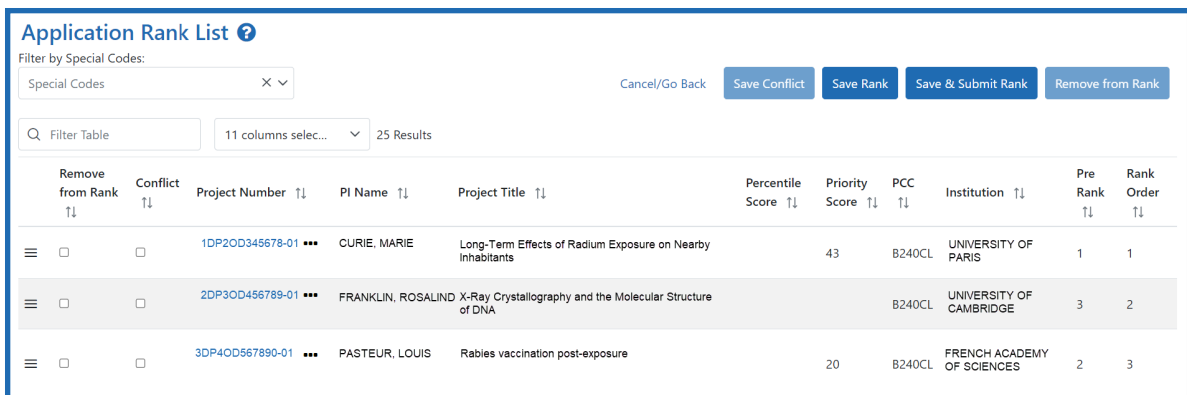
If comments are allowed when a list is created, you may add comments to each document.


1. Click the  three-dot ellipsis for the document or project and select **Add Comments**. The Add Comments screen is displayed.
2. Enter your comments in the **Comments** field.
3. Click the **Save** button. Your comments are added to the record, as indicated by the  **Expand** button and the  **Comments** icon.

- Click the  **Expand** button for the record, then click the  **Expand** button for the *Comments* pane to view your comment.
- To edit a comment, click the  **Edit** button, modify the comment, and click the **Save** button.

Ranking Applications

Rank Order voting requires that applications be put in a preferred order. Applications may have been pre-ranked by ECB administrators.



Application Rank List 

Filter by Special Codes:
Special Codes x v

Cancel/Go Back **Save Conflict** **Save Rank** **Save & Submit Rank** **Remove from Rank**

Q Filter Table 11 columns selec... 25 Results

Remove from Rank	Conflict	Project Number	PI Name	Project Title	Percentile Score	Priority Score	PCC	Institution	Pre Rank	Rank Order
<input type="checkbox"/>	<input type="checkbox"/>	1DP20D345678-01 ***	CURIE, MARIE	Long-Term Effects of Radium Exposure on Nearby Inhabitants	43		B240CL	UNIVERSITY OF PARIS	1	1
<input type="checkbox"/>	<input type="checkbox"/>	2DP30D456789-01 ***	FRANKLIN, ROSALIND	X-Ray Crystallography and the Molecular Structure of DNA			B240CL	UNIVERSITY OF CAMBRIDGE	3	2
<input type="checkbox"/>	<input type="checkbox"/>	3DP40D567890-01 ***	PASTEUR, LOUIS	Rabies vaccination post-exposure	20		B240CL	FRENCH ACADEMY OF SCIENCES	2	3


- If you wish to add a conflict, click the **Conflict** checkbox for the appropriate application, then click the **Save Conflict** button at the top of the screen. A confirmation screen is displayed.

NOTE: When a council member has a conflict with one application, a conflict is automatically added to all applications for that FOA.

- If you wish to remove an application from the list, click the **Remove from Rank** checkbox, click the **Remove from Rank** button, and click the **Yes** button in the confirmation screen.

IMPORTANT: Note that if you remove an application from the list, it will be removed for **all** council members.

If rankings have already been submitted by other users, the rankings will be updated based on the new rank order.

3. Click and drag the  move handle up and down to modify the order of the applications.
4. To save your progress and return to finalize the ranking later, click the **Save Progress** button. The new ranking is saved. You may return to saved rankings and change them later if you wish.
5. If you are ready to finalize the votes, click the **Submit Vote** button to submit the ranking. You will not be able to change the ranking once submitted. A confirmation screen is displayed. Click the **Yes** button to submit the votes.
6. Click the **Cancel/Go Back** link in the upper-right corner of the screen to return to the Council Information Page.

IMPORTANT: If voting closes while you have saved but not submitted rankings, the rankings will not be counted.

Voting on documents individually

Standard document voting can be one of two types: Standard Yes/No or Concept.

1. Select the radio buttons as appropriate for each document in the list.
2. Options for Standard Yes/No voting are **Yes** and **No**.
3. Options for Concept voting are **Approve**, **Approve with Modifications**, **Defer with further Information**, **Disapproved**, and/ or **Abstain**.

Agency-Specific Instructions: SAMHSA users do not have an Abstain option.

4. Click the **Save Progress** button to save the votes. You may return to saved votes and change them later if you wish.
5. If you are ready to finalize the votes, click the **Vote & Submit** button to submit the votes. You will not be able to change the votes once submitted. A confirmation screen is displayed. Click the **Yes** button to submit the votes.

IMPORTANT: If voting closes while you have saved but not submitted votes, the votes will not be counted.

Voting on applications individually

1. Select the radio buttons for **Yes**, **No**, and/ or **Abstain** as appropriate for each application in the list.

Agency-Specific Instructions: SAMHSA users do not have an Abstain option.

2. Click the **Save Progress** button to save the votes. You may return to saved votes and change them later if you wish.
3. If you are ready to finalize the votes, click the **Vote& Submit** button to submit the votes. You will not be able to change the votes once submitted. A confirmation screen is displayed. Click the **Yes** button to submit the votes.

IMPORTANT: If voting closes while you have saved but not submitted votes, the votes will not be counted.

Voting on documents globally

If you wish to vote the same way for all documents in the list, you may do so without selecting the votes individually.

IMPORTANT: If you have saved but unsubmitted votes, they will be overridden by the **Vote All** options. If you do not wish to override these votes, click the **Vote and Submit** button to submit them first.

1. Click the **Select All** button in the upper-right corner of the screen and select the appropriate option.
 - a. **Vote All Approve** selects the **Approve** radio button for all documents in the list for which votes have not been submitted.

- b. **Vote All Approve with Modifications** selects the **Approve with Modifications** radio button for all documents in the list for which votes have not been submitted.
- c. **Vote All Defer with Further Modifications** selects the **Defer with further Information** radio button for all documents in the list for which votes have not been submitted.
- d. **Vote All Defer with Further Modifications** selects the **Defer with further Information** radio button for all documents in the list for which votes have not been submitted.
- e. **Vote All Disapproved** selects the **Disapproved** radio button for all documents in the list for which votes have not been submitted.
- f. **Vote All Abstain** selects the **Abstain** radio button for all documents in the list for which votes have not been submitted.

Agency-Specific Instructions: SAMHSA users do not have an Abstain option.

- 2. Click the **Save Progress** button to save the votes. You may return to saved votes and change them later if you wish.
- 3. If you are ready to finalize the votes, click the **Vote & Submit** button to submit the votes. You will not be able to change the votes once submitted. A confirmation screen is displayed. Click the **Yes** button to submit the votes.

IMPORTANT: If voting closes while you have saved but not submitted votes, the votes will not be counted.

Voting on applications globally

If you wish to vote the same way for all applications in the early concurrence panel, you may do so without selecting the votes individually.

IMPORTANT: If you have saved but unsubmitted votes, they will be overridden by the **Vote All** options. If you do not wish to override these votes, click the **Vote and Submit** button to submit them first.

1. Click the **Vote Options** button in the upper-right corner of the screen and select the appropriate option.
 - a. **Vote Yes All** selects the **Yes** radio button for all applications in the list for which votes have not been submitted.
 - b. **Vote No All** selects the **No** radio button for all applications in the list for which votes have not been submitted.
 - c. **Vote Abstain All** selects the **Abstain** radio button for all applications in the list for which votes have not been submitted.

Agency-Specific Instructions: SAMHSA users do not have an Abstain option.

2. Click the **Save Progress** button to save the votes. You may return to saved votes and change them later if you wish.
3. If you are ready to finalize the votes, click the **Vote & Submit** button to submit the votes. You will not be able to change the votes once submitted. A confirmation screen is displayed. Click the **Yes** button to submit the votes.

IMPORTANT: If voting closes while you have saved but not submitted votes, the votes will not be counted.

Clearing Saved Votes

If you wish to clear all saved but unsubmitted votes and start fresh, you may do so.

NOTE: Submitted votes cannot be cleared or changed.

1. Click the **Clear Votes** link at the top of the screen. A confirmation screen is displayed.
2. Click the **Yes** button. All saved but unsubmitted votes are cleared.

Returning to the Council Information screen

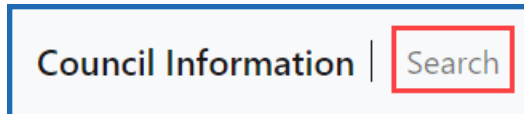
1. Click the **Cancel/Go back** link at the top of the screen. You are returned to the first tab of the Council Information screen.

IMPORTANT: Note that you will lose any unsaved votes when you go back to the Council Information screen. Click the **Save Progress** button first to avoid this.

Searching for Applications

ECB allows you to search for applications within your IC for the current council round using several criteria on the Application Search screen.

1. Click the **Search** tab in the ECB menu at the top of the screen.



The Application Search screen is displayed.

Selecting search criteria

Project Type searches for one or more project types. Enter a type, then select it from the drop-down list of potential matches. Note that you can select the **Exclude** checkbox to include all project types except the specified type(s).

Activity Code searches for one or more activity codes. Enter a code, then select it from the drop-down list of potential matches. Note that you can select the **Exclude** checkbox to include all activity codes except the specified code(s).

ICs searches for one or more ICs. Enter the IC abbreviation, then select it from the drop-down list of potential matches. Note that you can select the **Exclude** checkbox to include all ICs except the specified one(s).

Serial Number searches for the six-digit number assigned within an IC.

Support Year searches for the two-digit number indicating the segment or budget period of a project.

Suffix searches for the suffix appended to an application (e.g., A1 is a resubmission).

PI First Name searches for applications based on the PI's first name.

PI Last Name searches for applications based on the PI's last name.

Institution Name searches for applications where the primary investigator is affiliated with the specified institution. Note that this performs a contains search and wildcards are not necessary.

Project Title searches for applications based on the project title. Note that although you may use wildcards, you must enter three characters before a wildcard can be entered.

PO Name searches for applications based on the PO. Click the drop-down and select the PO you wish to search for.

Percentile allows you to set a minimum value, maximum value, or both for the Percentile score in council review. Note that if an application does not have a Percentile score, it will be filtered out if any criteria are entered here.

Priority Score allows you to set a minimum value, maximum value, or both for the Priority score in council review. Note that if an application does not have a Priority score, it will be filtered out if any criteria are entered here.

Study Sections fields search for the specified criteria.

Program Class Code searches for applications that include the specified class code(s). Use an underscore (_) for a wildcard representing one character and a percent sign (%) for a wildcard representing multiple characters. If you wish to include multiple criteria, separate them with a comma (.). For more information on program class codes, visit <https://partners.niehs.nih.gov/program>.

Running a search

Once you have selected the appropriate criteria, you are ready to run the search.

1. Click the **Search** button in the lower-right left corner of the screen to run the search with the selected criteria.

The Project Search Result screen is displayed.

Modifying a search

If your search did not find the expected results, you may need to modify your search criteria.

1. Click the **Go back** link in the upper-right corner of the screen.

You are returned to the Search screen and your search criteria are still selected.

2. Modify the search criteria as desired.
3. Click the **Search** button to rerun the search.

ECB Roles

Below are the roles and associated privileges for ECB users.

	ECB_COUNCIL_MEMBER_ROLE	ECB_NTP_COUNCIL_MEMBER_ROLE
Landing Page	View	
Search	View	
Council Information Page	View	View
Early Concurrence	View	
Voting	View / Vote	