



Internet Assisted Review Focus Group

Date: February 26, 2003, Thursday
Time: 9:30–11:00 a.m.
Location: Rockledge 1, Room 3502
Advocate: Eileen Bradley
Analysts: Tracy Soto, Daniel Fox
Next Meeting: Friday, March 12, 1–3 p.m., Rockledge 1, 5th Floor Conference Room

Action Items

1. (Brian Wojcik) Send a request for SRA access to workgroup meetings to Tracy Soto and Daniel Fox.
 2. (All) Send email to Tracy Soto and Daniel Fox regarding their thoughts on file size limits for the Meeting Materials and list of type of document (file types) and descriptions.
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eRA Update

Eileen Bradley welcomed everyone to the meeting and, after introductions, she updated the group on the eRA Project. She said that the eRA process has changed since the contract recompetes and the awarding of new contracts. Northrop Grumman Information Technology (NGIT) is no longer the sole contractor. The following table shows the eRA contracting companies, their partners and the areas of eRA they will support.

Contract	Partners	Role
AC Technologies	Booz Allen Hamilton	Design, Development, Maintenance
Northrop Grumman Information Technology, Inc. (NGIT)	Silicon Spirit Global Solutions	Design, Development, Maintenance
Science Application International Corp. (SAIC)	Altum Turner Consulting Group	Design, Development, Maintenance
RS Information Systems		Helpdesk
Optimus		Documentation
RNSolutions		Technical Operations
IBM		Integration, Architecture, Analysis and Testing

Tracy Soto is the business analyst for IAR and Daniel Fox is the requirements analyst. Tatiana Khramkova, IBM, is working on eRA integration and will be involved with this group too.

The process for adding enhancements and new features, fixing bugs and maintaining IAR also has changed. Now, new development will be prepared, prioritized and submitted for approval. Upon approval, they will become part of a task order that will be bid upon by the approved contractors. There is an existing maintenance contract so anything that is deemed “maintenance” can be done through it. Tracy and Daniel have been collecting requirements and enhancements from the beginning (see handout). They already have determined the changes for the next release.

Tracy also noted that the eRA System has been designated as the grants processing system for all of HHS, and CDC, among a few others, is already using it.

IAR Update

Tracy reported that the IAR module is being well used and she cited these statistics:

- More than 7,000 reviewers using IAR
- More than 40,000 submitted critiques
- More than 14,000 preliminary Summary Statements
- About 350 meetings in each council now using IAR

Major Concern with Help Desk Support

Eileen updated the eRA Project Team about Review and raised the serious issues of Helpdesk training and resources, and duplicate profile clean-up. She said that there has been an increase in calls (from 250 calls per week to 450 calls per week) to the Helpdesk from the Review segment and the Helpdesk does not have enough people to keep up with the calls. Jim Cain told Eileen that he is adding more people to the Helpdesk, increasing the hours the Help desk is open (till 8 p.m. weekdays and 6–8 hours on the weekend), and to Jim Tucker’s group, who do profile collapses.

It was suggested that there be further training for Helpdesk staff as well as training or communication regarding accounts and passwords, about which 95 percent of Helpdesk calls pertain.

Duplication Files/Account Activation/Registration Problems—Additionally, the clean up of duplicate profiles is proving a great hindrance in registration and account activation. Although profiles are being cleaned up, duplicate ones are added to the system daily. This is interfering with the rapid profile verification that is crucial to IAR.

Another complication is that when a reviewer starts the process to gain access to the Commons and establish a profile, s/he fills out a first screen but often does not complete the process by going to subsequent screens to verify profile information already in the Commons. If the process is not completed, i.e., the user doesn’t complete all of the registration screens, the account is automatically flagged as *pending*. If *pending*, the account doesn’t go to Data Quality for activation and the process is delayed. The reviewer is not able to log onto the Commons.

The question was raised as to whether or not the SRA can do Read Email Confirmation when the reviewer reads invitation emails? The answer was “No.”

Tracy said that they have made some changes to the screens, such as putting in Continue>> to encourage people to continue the process to completion. Also, there is a request to improve some of the messages to convey more accurate information, e.g., saying a PI has a pending account and taking them to the appropriate screen to complete their account request instead of giving them an error that says their account is locked.

Several suggestions were made:

- Make available the screens that Reviewers see during account creation to a wider audience so SRAs and GTAs can help Reviewers through the process.
- Ask the SRAs to do the IAR demo to get a better feel for the process and how the screens look.
- Make the Commons username visible in Person Administration in IMPAC II. Currently, it only shows if an account is PERM. Having the username visible would aid SRAs and GTAs in assisting reviewers.
- Make the Profile MLG email address the eRA System email address. There is now some confusion regarding eRA account emails vs. emails on Reviewer profiles.

Virus—More than 3,000 files were infected by a virus. All by 20 have been cleaned up. Preventives are being put into place to minimize the possibility of this happening again.

IAR a major success overall—Eileen noted that the increase in usage and input from users indicates that the IAR is a big success. In fact, the problems we're seeing are simply a result of our success.

Requirements List

Requirements: http://era.nih.gov/Docs/IAR_Requirements_02-26-04.pdf

Tracy reviewed the first 20 requirements on the list. These are already in the queue for the next release. At the next meeting, she will ask the group to prioritize the rest. Once there is agreement, she will take them to the Review Users Group for approval, and then to the eRA Project to get them into the process.

Expired Account Letter—Reviewers have called the Helpdesk and have been told that their registration email links in the invitation emails expire. In fact, their invitation emails have not expired. The Helpdesk needs to have some training in the process. Tracy will follow through on this type of issue if people will send the Helpdesk ticket number and a description of the problem to her.

Workgroup Meetings—Brian Wojcik raised an issue regarding workgroup meetings. The SRA can't access these meetings at this time; only the parent-committee SRA can access it.

Action: (Brian Wojcik) Send a request for SRA access to workgroup meetings to Tracy Soto and Daniel Fox.

Critiques—IAR only creates preliminary summary statements for the parent grant, not for subprojects. However, the critiques for subprojects are included in the parent grant preliminary summary statement. There is currently a bug in IAR where if there is no critique for the Parent, the system won't assemble the preliminary summary statement. The SRA can enter a dummy

critique for the parent and everything should assemble accordingly. This is a bug that will be fixed in a future release. There were questions about what order the subproject critiques appear in the parent preliminary summary statement. They appear using the order of review in Peer Review or the order in which the subprojects are entered on the Subproject screen in Peer Review.

Suggestion: Include an option to turn on or off the numeric scoring at the meeting level.

Search Meeting Capabilities (Req. #9)—Add sort ability to the meeting list (just like in Peer Review).

Additions to Screens

Screens: http://era.nih.gov/Docs/IAR_Screens_02-26-04.pdf

Daniel walked through the additions to the IAR screens.

Screen	Comments
List of Applications	<ul style="list-style-type: none"> • He pointed out the “Lower Half” notation on the far right. • Add Meeting Materials link.
Submit Critique and Preliminary Score for Unassigned Reviewers (functionality for SRA/GTA)	<ul style="list-style-type: none"> • The Reviewer field has a pull-down menu that includes all eligible (not in conflict), unassigned reviewers.
Export Score Matrix to Excel	<ul style="list-style-type: none"> • The group agreed that the Conflicts (C) column is needed.
Meeting Materials	<ul style="list-style-type: none"> • Daniel asked for some input regarding the types and sizes of files that they might want to include for a review (e.g., audio MP3 files, 50 MB). <p>Action: (All) Send email to Tracy Soto and Daniel Fox regarding their thoughts on file size limits for the Meeting Materials and list of type of document (file types) and descriptions.</p> <ul style="list-style-type: none"> • The group agreed that the materials should be posted in whatever format they are received and not be automatically converted to PDF format. • The <i>Manage Meeting Materials</i> option is available only to SRAs and GTAs.
Import Meeting Materials	<ul style="list-style-type: none"> • Add “from Another Meeting” to the screen title. • Change format example for Council Date from 2004/01 to YYYY/MM. • Materials can be brought into a meeting from another meeting in an IRG cluster • The group agreed that materials should be purged on the same schedule as the automatic system purging of critiques, which is six months after the release of the

Screen	Comments
	meeting.

Additions to current releases

The group agreed that the following new requirements should be added to the current release:

- Add meeting-wide option to toggle the ability to submit non-numeric scores. Default is Allow.
- Modify the boilerplate on the Critique/Score confirmation screen to remind reviewers about score entry.

New requirements

The group agreed that the following should be added to the list of new requirements:

- Periodically email Reviewers when they have started but have not completed their registration.
- SRAs need to see Commons User IDs of potential Reviewers. This could be an addition to the Person Administration.
- SRAs/GTAs need to see sample meeting invitation emails that go out to the Reviewers. This should be posted on the Web.
- Can SRAs/GTAs see the screenshot of the last page of the registration process (account reconciliation)?

Enhancement List

Ev Sinnett collected a list of IAR enhancements and then asked his colleagues to score them as they would a grant application. The list is attached. Tracy asked the group to review and score them so that they can be discussed at the next meeting.

Attendees

Ansari, Aftab (NIAMS)	Herley, Joan (AHRQ)	Rudnick, Stefani (NIAID)
Bielat, Kenneth (NCI)	Khramkova, Tatiana (IBM)	Seppala, Sandy (LTS/PCOB)
Binder, Roberta (NIAID)	Lassnoff, Cynthia (NIAID)	Sheridan, Peter (NIMH)
Bradley, Eileen (CSR)	Moen, Laura (NIHMS)	Sinnett, Ev (CSR)
Cecil, Christina (NIMH)	Musto, Neal (NIDDK)	Soto, Tracy (OD)
David, Bobbie (CSR)	Perrin, Peter (CSR)	Tatham, Thomas (CSR)
David, Tracey (CSR)	Petrosian, Art (CSR)	Thee, Linda (CSR)
Diaz, Juana (NCI/DEA)	Pham, Phuong (NCI)	Trocki, Rebecca (AHRQ)
Dinterman, Kathy (CSR)	Pike, Brian (NIGMS)	Wojcik, Brian (NCI)
Fox, Daniel (NGIT)	Prenger, Valerie (NHLBI)	
Hannah, Judy (NHLBI)	Richters, John (NINR)	

