Internet Assisted Review Focus Group

Date: January 31, 2003, Friday
Time: 9:30–11:00 a.m.
Location: Rockledge 1, Room 3502
Advocate: Eileen Bradley
Team Leaders: Tracy Soto, Daniel Fox

Action Items

1. (Daniel Fox) Check with CM to determine whether or not a roster can be established without setting a meeting date.

2. (Daniel Fox, Tracy Soto) Investigate options for assigning multiple SRAs/GTAs to a meeting.

3. (All) Send examples of multiple SRAs to Daniel Fox.

4. (Tracy Soto) Add the following to the July requirements list:

   - The option for Reviewer name to be on the preliminary Summary Statement with a default to no name.

   - The ability to view grant application images through a hyperlink on the grant number.

   - The ability to print all critiques, sorted by PI, with each PI beginning on a new page.

Update of Pilot and Future Releases

Three to seven SRAs currently are using the IAR or will start using it next week. So far, the pilot is going well and will continue to ramp up, adding more people who signed up for the pilot. Further expansion won't take place until after the March release. At that time, if all continues to go well, IAR will open up to RUG members.

Eileen Bradley announced that she will present a "show-and-tell" event in CSR to inform people about IAR, show them the differences with what they are doing now, and demonstrate the benefits of using it.

March IAR Release

There are some bug fixes and small enhancements scheduled for the March release:

- All phone reviewers must have access to all critiques. They must be treated like reviewers who attend the review meeting. Currently, they are blocked from viewing other critiques.

- Correct the Score Matrix screen logic so that Blocked Reviewers do not see scores on their blocked applications. In other words, they will still see the application list, but instead of seeing the scores, they will see the word "blocked."

- When email is missing in Control Center for Reviewer with an active NIH eRA Commons account, the email label should say, "Rev Update in Commons."

There are several new developments that will also be included in the March release.

- **Identify Teleconference meetings.** The word "teleconference" will appear everywhere the meeting title appears.

- **Implement On-Line-Help and IMPAC II Messages.** This will be done enterprise-wide for all of the NIH eRA Commons site, and it will be done by NIH eRA Commons programmers, not those on the IAR team.

- **Add Control Center Meeting-Wide Options.** Add Control Center functionality for setting meeting-wide options for allowing unassigned critiques to be submitted fro the Edit and/or Submit Phases.

- **Add a Critique Status Report/Add Sort Options to the Reviewer List.** Three new sorts were added to assist users in monitoring the status of Reviewer critique submissions.

- **Add Sort Options to the List of Applications.** This option will allow users, on the List of Application screen, to sort by IC/Serial and Act/IC/Serial in the Application column.

- **Add View All Critiques for a Reviewer.** This adds the ability to view all critiques submitted by a Reviewer.

- **Ensure that Phone Reviewers see all meeting critiques.** To meet a Review policy, Phone Reviewers will be treated like other Reviewers and not blocked from seeing the critiques.

Define Requirements for July Release

Several issues were raised regarding July requirements, which are due before the March release.

Issues Raised by Pilot Users	Comments
i. Are both Confirmation and Validation screens necessary? After Confirmation should user be returned to the original screen where they changed/submitted the data?	The group agreed to leave both the screens, including the confirmation screen, as they are until after the March release. After seeking more feedback, reconsider and make a decision then.
ii. (Already on the July List) Clean up of Phone Reviewer logic.	This requires a lot of back-end work.
iii. Should a Reviewer assigned as a Discussant on an application be blocked during the Read Phase if they didn't submit?	Now, all Reviewers are blocked if they haven't submitted. The group agreed that a Discussant should not be blocked. Also, if a person on an assignment list is supposed to contribute written material, that person should be listed as a Reviewer and not a Discussant. A Discussant does not write anything.

Issues Raised by Pilot Users	Comments
iv. GTA on Roster—CM Bug with IMPAC II Account	The UserID is not populating the role field. The bug has been tracked to the Person data. Need to fix the bug.
v. Personalize Registration emails: Given the established relationships between SRAs and their reviewers, and the appearance that email invitations are sent by SRAs, the "Dear Reviewer" seems a bit cold, and the opening "Thank you" sentence is likely to be redundant with something similar reviewers have received from their SRAs. **Recommendation:** Replace "Dear Reviewer" with "Dear Dr. (insert Last_Name)," and replace the first sentence with: "This is an automated invitation to the NIH Commons eRA Internet Assisted Review (IAR) website in connection with your participation on Special Emphasis Panel/Initial Review Group (insert IRG identification, e.g., ZNR1 Rev-A (52)/NRRC (26), scheduled for (insert meeting begin/end dates)."	One suggestion was to insert the addressee's name into the salutation instead of the generic "Dear Reviewer." Another suggestion was made, and agreed to by the group, to insert the sentence, "This is a system-generated invitation," right after the salutation, "Dear Reviewer." This eliminates the need to insert the person's name. It was suggested that the meeting date be automatically inserted into the letter. However, it was noted that sometimes a roster is established without a set meeting date. **Action: (Daniel Fox) Check with CM to determine whether or not a roster can be established without setting a meeting date.**
vi. List of Meetings: Column width vs. line wrapping vs. truncation in the Meeting and SRA Name columns. Some SRA names in CSR are as much as 20 characters long, and some study section names top 50 characters. As currently set up, these will line wrap at the expense of displaying more meetings per screen. I expect at least some SRAs will need to scroll to get to their meetings; there may be a preference to truncate to reduce the need to scroll.	More input from pilot users needs to be examined before making this change. Keep this on the list for future consideration but do not change now.
vii. How are viruses handled?	All virus issues are resolved at the NIH eRA Commons level, and not at the module or application level. This issue stems from a change in the way applications are scanned for viruses upon submission, particularly in regard to Word files. In the past, the files were scanned when they were received and, if a virus was detected, the sender was notified and asked to fix and

Issues Raised by Pilot Users	Comments
	resend.
	Now, all submissions are accepted and loaded into the server. As some point, all files are scanned for viruses. If a virus is detected, the system automatically tries to fix it. If it cannot, the file is deleted, with no notification to anyone.
	Analysts want a virus scan upon submission of files.
viii. What if I need to remove a Reviewer from the meeting (they already have an account and have submitted critiques)? Can SRA just remove them from the CM roster? If so, will they still be able to access meeting? Must disable from IAR first? What happens to their critiques?	When you remove a Reviewer from a meeting after the Reviewer has submitted critiques, the critiques remain in the system. Regarding the Reviewer, when the name is deleted, it ripples through all associated modules and name is deleted throughout.
	The issue of the critiques is trickier. They are not automatically deleted when the Reviewer is removed from a meeting. They will appear when all critiques are compiled. Therefore, it was suggested that the critiques be removed prior to removing the Reviewer.
	Suggestion: Conduct case study—remove a Reviewer and see what happens.
	Suggestion: Put a check box on the Reviewer delete screen to delete the critiques.
	This issue will be discussed again at a later date.
ix. On View List by Reviewer, add sort by Role, with an order of Primary, Secondary, Tertiary, Reviewer, and Discussant (subsorted on PI name).	This will be in the Reviewer list, on the SRA-only screen.

Issues Raised by Pilot Users	Comments
x. Assistant SRAs can't see the meeting.	Currently, the system only allows the designation of one SRA per meeting. However, the group agreed that it is often the case that there are multiple SRAs assigned to a meeting and that there should be a way to designate them in the system. **Action: (Daniel Fox, Tracy Soto) Investigate options for assigning multiple SRAs/GTAs to a meeting.** **Action: (All) Send examples of multiple SRAs to Daniel Fox.**
xi. Reviewer name is not on Critique header for SRA/GTAs.	When the documents are converted to PDF, the critiques are used for many purposes (Reviewers, internal). Therefore the Reviewer's name is not put in the critique header. This would be very costly to accomplish. This will be put on the list for a later discussion. It was suggested that the Reviewer name be automatically inserted on the pre-Summary Statement. **Action: (Tracy Soto) Put option for Reviewer name to be on the preliminary Summary Statement with a default to *no name*, on the July requirements list.**
xii. View All Meeting Critiques enhancement: It appears that the default sort is on grant number order. While there are several possible sorts that SRAs might want, linking it to the REV Order of Review would be the simplest and would offer all common options.	
xiii. Control Center enhancements for left side (selected reviewer options): Turn most of the stuff there into plain text, so only a short command-sounding word appears to be a link. Change these commands to show what they are really doing:	

Issues Raised by Pilot Users	Comments
• ENABLE (Puts Y in Column E)—Send e-mail… • BLOCK (Puts Y in Column B)—Block from reading... • DISABLE • UNBLOCK Another thought would be to have check boxes or radio buttons for the four options with a Submit button. Obviously, clicking both ENABLE and DISABLE would not be allowed—only the last clicked would be acted upon for the two pairs of actions.	

The group discussed the issue of not allowing Review Technical Assistants (RTAs) access to the IAR. There was some feeling that they should have access. However, these rights are based on those set throughout the NIH, and it is the responsibility of CSR to address this issue.

Scope Document Requirements

A few changes in selected sections of the Scope Document were discussed. The change sections and the group comments and decision are shown in the table below.

In addition, Tracy Soto proposed that application numbers be hyperlinked to the grant application image. John McGowan suggested this. In the discussion, however, it was pointed out that, should you want to read the grant application at this point, the program would time out before you could read it. Also, the hyperlink would have to filter through conflict-of-interest data to determine whether or not the user would have permission to see the grant image. If there is a block on all conflicts, it makes the system more restricting. However, on CDs, there are conflict-of-interest restrictions in place so there should be a way to do this.

Action: (Tracy Soto) Put the ability to view grant application images through a hyperlink on the grant number on the July requirements list.

Tracy also asked that everyone who uses the system write down all anomalies and issues and send them to her so that they can be addressed as soon as possible.

1.1 Release Meeting to IAR/IAR Control Center

Use Case Ref	Requirement	Comments
Is meeting-wide option really needed? Can currently select all and blocked is	The IAR Control Center should allow SRA/GTA to disable (block) *all* (meeting-wide option) Reviewers from reading critiques on applications where they are assigned but did not post their own critique.	Change from *Must* to ***Won't***.

default value.		
	The IAR Control Center should allow SRA/GTA to toggle show/hide preliminary scores from all (meeting-wide option) Reviewers in IAR. If Scores are hidden, Reviewer would only see scores they've entered. Per Reviewer or for all? If scores are hidden, should Score Matrix be disabled?	Change from *Must* to ***Deferred***.

1.2 Submit Phase

Use Case Ref	Requirement	Comments
	The system must provide the ability for SRA/GTAs to submit unassigned critiques for Reviewers.	Leave at *Should*, but revisit at a future time.

1.3 Read Phase

Use Case Ref	Requirement	Comments
	For the Reviewer, average score needs to be displayed in the critique headers (10/16/02—must consider implications, all critiques for an application will need to be recreated if any score changes, slower performance, less availability of the pdf critiques).	Change from *Should* to ***Could***. The group attending the meeting thought this would be of no value. However, those not represented at the meeting may be able to justify the value so this will be held for future discussion.
View Critiques Use Case	For the SRA/GTA, the application number, PI name, Reviewer name, assignment type, score and the date and time of posting need to be displayed in the critique header. Critiques will be viewed in Adobe pdf format.	Change from *Must* to ***Could.***
	For the SRA/GTA, average score, should be displayed in the critique header.	Change from *Should* to ***Could***.
	If the SRA/GTA designates in IAR Control Center to hide scores, they should not display on Critiques.	Change from *Must* to ***Could***.

1.5 Summary Statement Assembly

Use Case Ref	Requirement	Comments
	The screen should indicate the date and time of Pre-Summary Statement creation.	Change from *Must* to **Could**, but at a later time. Currently the date and time are on the file but not on the screen.
	If the Pre-Summary Statement is still processing, the screen should indicate date and time processing began and number of jobs ahead of it in the queue.	Change from *Must* to **Could**, but at a later time.
	SRA/GTA needs the ability to print all critiques, sorted by PI, with each PI beginning on a new page. The requested feature would allow all SRA/GTAs to bring a collated copy of each "proto summary statement" to the meeting and be able to refer to them during the meeting. This allows SRA/GTAs to ensure that key points made at the meeting are actually written into the critiques. The ability to add the line number from the vote sheet is also needed.	Change from *Could* to **Must**. The critiques are now printed by grant numbers. Giving the option to print by PI would be easy to do. There would be a choice to print by application number or by PI name. **Action: (Tracy Soto) Add the ability to print all critiques, sorted by PI, with each PI beginning on a new page to the July requirements.**

Attendees

Binder, Roberta (NIAID)

David, Tracey (CSR)

Derflinger, Brenda (SRB)

Dickson-Scott, Trish (CSR)

Eileen Bradley (CSR)

Ellis, Bonnie (SRB)

Fox, Daniel (NGIT)

Lassnoff, Cynthia (NIAID)

Liberman, Ellen (NEI)

Musto, Neal (NIDDK)

Nordstrom, Robert (SRB)

Pancholi, Mital (SRB)

Richters, John (NINR)

Seppala, Sandy (OCO)

Sinnett, Ev (CSR)

Soto, Tracy (OD)

Sukhenko, Mike (Z-Tech)

Wojcik, Brian (NCI)