



Review Users Group Meeting

Date: Mon., March 10, 2003
Time: 1:00–3:00 p.m.
Location: Rockledge 2, Room 3087
Advocate: Eileen Bradley
Next Meeting: TBD

Action Items

1. (Mike Cox) The RUG approved the new Review Folder concept and asked Mike Cox to move ahead with the project. The RUG also asked Mike to include RUG members in the proposed JADS.
2. (All) Bring a list of documents that you think should be in the Grants Folder to the next RUG meeting.

Presentations

- Review Folder by Mike Cox: http://era.nih.gov/Docs/Review_Folder_03-10-03A.pdf

New Concept for CD Ordering/Reviewer Folder

Mike Cox

Mike Cox presented a new concept for organizing and accessing the Review Folder on-line and on CDs. The proposal is a result of content quality problems that have arisen during the past year of preparing CDs for Reviewers. Some of the specific issues are:

- Review Guidelines are not always available before CD production.
- Only three ICs have provided the required Web page of Review Guidelines.
- Some SRAs have reported that a complete set of PA/RFAs is not always on the CD.
- PA/RFAs are not always reported on the Grant application so IMPAC II does not indicate a need for PA/RFA. This might involve incorrect data entry.
- Some ICs apparently maintain PA/RFAs outside the NIH Guide.

The Review Policy states that Reviewers only should receive approved Review Guidelines, PAs and RFAs.

The Review Folder contains all the documents for a particular review meeting, as prepared for Reviewer by the SRA/GTA. The Grant Folder, by contrast, only contains the documents for a specific grant. This proposal addresses the Review Folder only. The Review Folder contains the following items:

- General meeting information
- General Review Guidelines
- Specific Review Guidelines

- PAs and RFAs
- Grant applications
- Prior Summary Statements
- Other application materials
- Other document types

Mike presented a user interface to the Review Folder that the Reviewer would use whether accessing the Review Folder on-line or on a CD. Currently, the CD contains, besides administrative programs such as the Adobe Reader and CD User Guide, General and Specific Review Guidelines, PAs and RFAs, Grant applications and prior Summary Statements.

This new Review Folder would allow the SRA to edit the collection to ensure that it is accurate and complete. It would allow only approved Review Guidelines and PA/RFAs. The ICs would have the flexibility to control and provide their own approved versions.

This concept would also address the issue of high-resolution graphics and photos being made available. They are difficult to email but would be accessible through links in the Review Folder.

This Review Folder could be placed in IAR for on-line Reviewer access, setting the stage for the eventual obsolescence of CDs.

The Review Folder could serve as a new interface to the CDs, providing SRAs and Reviewers with the same UI no matter if using a CD or the Internet.

Mike proposed the following project and transition plans:

Project Plan

- RUG and Review Advocate approval
- RPC review
- Cost estimate
- ERA Project approval for cost, schedule, priority
- Three JADS, comprising users, analyst, developers, testers, and techwriter:
 - Overall concept
 - Business rules, document types, policy
 - User interface and data requirement

Transition Plan

- Develop transition plan
- Possible RPC policy announcement regarding plan (especially if any CD product or service is required to scale back)
- Develop Web site for approved review guides
- Possible patch release for CD order download file (e.g., include more data for ID of guides)

Discussion

Eileen said that this is the missing link in the Review module. She observed, however, that the concept is too entwined with the CD and that, in fact, with this interface, the CD is no longer needed. She asked Mike to uncouple the Internet and the CD in regard to the Review Folder.

Daniel Fox raised the issue of scanning, uploading to the IMPAC II database and maintaining the extra documentation for the Review Folder. For example, now, the guidelines are not managed in IAR. Mike replied that all the documentation would have to come together on the Internet and have an acceptable interface with IAR as well as the NIH eRA Commons grants submission process.

Mike noted that the project should start now for the Review Folder to deploy in October 2003. The end result would be that all of the documentation that SRAs would want would be accumulated in one place, and then the SRA would make them available to users in the IC's choice of media: Web, CD, paper, etc.

Tracy Soto confirmed that the Review Folder could be integrated into the IAR module.

The RUG agreed to move ahead with this project. Eileen requested that RUG members be participants in the JADs and involved in the development of the Review Folder.

Action: (Mike Cox) The RUG approved the new Review Folder concept and asked Mike Cox to move ahead with the project. The RUG also asked Mike to include RUG members in the proposed JADS.

A presentation will be made to the Review Policy Committee (RPC) regarding this project.

Scanning/Paperless Business Practices Focus Group

Mike Cox announced that the group that was first known as the Scanning Focus Group and then became the Paperless Business Practices Focus Group has been disbanded, having fulfilled its goals. Steve Hausman, who was the Advocate, is now Advocate for New Technologies. As part of this new business area, Mike, working with Steve, will be forming focus groups in the business areas to address specific issues pertaining to new technologies.

Peer Review Update

Tracy Soto

March Release

Tracy Soto reviewed the changes that will be deployed in March.

- Add two new score mailers for Fellowship applications
- Maintenance/bug fixes and small enhancements:
 - Minutes will be modified to show Acting Chair.
 - Four assignment reports will be enhanced to allow toggle of display of reviewer assignment roles.
 - The hitlist report from the Advanced Persons Search will be corrected so it includes Committee Service History.

- A link to ICSTORE will be added to the banner screen and List of Applications.
- When the user double-clicks on the grant number from the Assign Reviewers screen, the grant folder for that application will be displayed. This will allow the SRA/GTA to have more direct access to the scanned grant application and other needed information.

Proposed Items for July Release

Tracy also reviewed the proposed changes for the July release. Requirements for the July release are due very soon. This list is not finalized and there are no budget approvals as yet.

- Maintenance/bug fixes and small enhancements:
 - To support IAR, add an option on the reviewer delete function to also delete that reviewer’s critiques and scores from IAR.
 - Modify Peer Review to not allow a user to change access on a Summary Statement if it is in the Building Final or Building Draft mode.
 - Fix report sorting. The sort by SRA name incorrectly sorts on first name instead of last name.
 - Add the RFA/PA number to the hitlist report accessible from the IRG/SRG Reassignment Screen. RFA/PA is currently on the screen but not included on the report.
 - Add SRA Remarks to the Assign Reviewers and IRG/SRG Reassignment screens.
 - Add a “delete row” ability to delete all reviewers on an application at once, instead of using delete cell for each one.
- Minor Score Mailer fixes.
- New method for uploading Summary Statements. Today, uploads are client-server but, in the future, they must be done in the new J2EE architecture. The change will be transparent to the user.
- Ability to export specific reports to Excel (no Discoverer). The group agreed that the most important reports that should be in this deployment are:
 - Master Assignment List
 - Administrative Data
 - Composite Scoring Sheet

Internet Assisted Review

March Release

Tracy also presented the IAR changes that will be deployed in the March release.

- If meeting is a telephone conference, IAR should display “Teleconference” with meeting title anywhere the meeting title is displayed in IAR.
- Implement on-line help.

- Add Control Center functionality for setting meeting-wide options for allowing unassigned critiques to be submitted for the Edit and/or Submit Phases or neither.
- Add sort options to the List of Applications by Reviewer view (PI Name, Role and Critiques Submitted Date).
- Add sort options to the List of Applications by Application view (IC/Serial and Act/IC/Serial).
- Add View All Critiques for a Reviewer option.
- Maintenance and small enhancements:
 - Add Council Meeting date to List of Meetings screen.
 - Add link to List of Applications to Control Center.
 - Browser refresh must work on List of Applications screen, in all views for both SRA/GTA and Reviewers.
 - Remove Phone Reviewer options in Control Center.
 - NIH eRA Commons will increase timeout to 45 minutes.
 - NIH eRA Commons and IMPAC II databases will merge—any changes made in Peer Review will be immediately available in IAR.

IAR July Release—Full Production Release

Tracy noted that there will be a full-production release of IAR in July. She listed the highlights of the release:

- Add Calendar to Edit Dates screen for each date field to let user click calendar and choose date. User should still be able to manually type date in field.
- Add tags to the List of Applications so when user submits a critique for an application and then clicks back to List of Applications they are taken back to the same application instead of the top of the list.
- Add the ability to view the critique on Submit Successful screen.
- Add Meeting-Wide Option for including Reviewer names in the Preliminary Summary Statement body.
- Reviewers assigned as Discussants on an application should not be blocked during Read if they didn't submit a critique.
- Allow any SRA or GTA on the roster to see the meeting in IAR.
- Make Application Number a hyperlink for viewing the grant image.
- Add an option to view all meeting critiques (in Adobe PDF format) sorted by PI.
- Minor enhancements and bug fixes including:
 - Make navigation links larger and bolder
 - Leave critique filename on Submit Critique and Score screen if user clicks cancel after they click submit

- Clarify instructions on submit, submit validation and confirmation screens
- Modify invitation emails to clarify that the email is system-generated and add meeting dates
- Fix sorting on score matrix for lower half and AVG

IAR Discussion Items

- Is the current method of handling preliminary summary statements working?
- Would a method of zipping and downloading all preliminary summary statements at once be helpful?
- Is there a need to have all meeting critiques in one Word document or keep them as separate Word documents (one for each application)?

J2EE Grant Folder

The documents that are currently in the Grant Folder are—

- Grant Snapshot Report
- PI History Brief and Detailed
- Current and Prior Summary Statements
- Abstract
- NGA
- FSRs
- e-Application

Are all current grant folder documents useful to Peer Review?

What additional documents are needed?

Tracy asked that everyone think about what documents should be in the Grant Folder and to bring that list to the next RUG meeting.

Action: (All) Bring a list of documents that you think should be in the Grants Folder to the next RUG meeting.

Attendees

Benjamin, Angela (NIDR)	Fox, Daniel (NGIT)	Pham, Phung (NCI)
Binder, Roberta (NIAID)	Gibb, Scarlett (OD)	Prenger, Valerie (NHLBI)
Bradley, Eileen (CSR)	Githens, Sherwood (NCI)	Richardson, Carolyn (NCRR)
Cox, Michael (OD)	Lassnoff, Cynthia (NIAID)	Seppala, Sandy (LTS)
David, Bobbie (CSR)	Moen, Laura (NIGMS)	Soto, Tracy (OD)
David, Tracey (CSR)	Musto, Neal (NIDDK)	Windle, Sosi (NINDS)
Ellis, Bonnie (CSR)	Nordstrom, Robert (CSR)	