Review Users Group Meeting

Date: Thurs., May 29, 2003
Time: 1:00–3:00 p.m.
Location: Rockledge 2, Room 3087
Advocate: Eileen Bradley
Next Meeting: TBD

Action Items

1. (Tracy Soto) Arrange for the new CM module and IAR interface to be presented at the next meeting.
2. (Dan Hall) Provide a list to Daniel Fox and Tracy Soto of affiliated and unaffiliated Reviewers, and which institutions currently are registered.
3. (IAR Pilot Users) Send corrections, edits and suggested changes to the Reviewer invitation and activation emails to Tracy Soto by June 6.
4. (Tracy Soto) Contact Maddy Monheit regarding an article about the Review reports that will be available for downloading.

Attachments

- IAR in eRA Commons: http://era.nih.gov/Docs/IAR_in_Commons_05-29-03.pdf
- Peer Review Export Reports to Excel: http://era.nih.gov/Docs/Peer_Review_Excel_Rpts_05-29-03.pdf
- IAR–eRA Commons Emails: http://era.nih.gov/Docs/IAR_Emails_for_RUG_review.pdf

Internet Assisted Review in eRA Commons

The new, single UserID/password sign-on for the NIH eRA Commons makes it easy for the extramural community to communicate with the NIH. The extramural community can or will be able to use IAR, eSNAP, FSR and X-Train applications/modules through eRA Commons. Selected processes of the Committee Management module, for NIH staff, also will be available in July.

Action: (Tracy Soto) Arrange for the new CM module and IAR interface to be presented at the next meeting.

There are two ways to create an account in the eRA Commons:

- *Institution*—the PI can create all the accounts for their institution
- *SRAs at NIH*—can create accounts strictly for Reviewers

The permissions are determined by how the account was created:

- *Affiliated*—the institution created the account

- *Unaffiliated*—the institution has not made an account for the person, so the person is not affiliated with an institution

When an account is created, eRA matches data to—

- Social security number (if available)
- Phone, last name, first initial, IPF
- Email, Last name, first initial, IPR
- Birthdate, last name, first initial, IPF

The match is on Profile and Role records.

Currently, there are too many duplicates accounts in the system, which a team of data quality staff is trying to clean up. A new process is being developed to better and more efficiently verify new accounts, with a goal of eliminating duplicate accounts.

Dan demonstrated the new accounts process for the eRA Commons/IAR, noting that the IAR module is in pilot and will go into production in July. He said that 20–30 percent of email addresses are incorrect, which impacts the ability of automatic IAR invitation email letters to be sent to reviewers. Additionally, when the error email is returned, staff has to take time to figure out the correct email and correct it. Also, email addresses are a key field identifier for verification of accounts, so incorrect emails impede the verification process.

Another item of note are the personal (PPF) and institutional (IPF) profiles. They are now structured so that the individual PI and a designated institutional representative take responsibility for these profiles. NIH staff cannot make changes to them. It is the responsibility of the PI and the institution to keep the profiles up to date.

Summary Statements and scores soon will be available to registered, affiliated account holders. It was suggested that a window appear when an unaffiliated account holder tries to access sections of the site that only are available to affiliated accounts holders that tells them how to become an affiliated account holder.

Action: **(Dan Hall) Provide a list to Daniel Fox and Tracy Soto of affiliated and unaffiliated Reviewers, and which institutions currently are registered.**

Most features of the eRA Commons only are available to affiliated account holders. However, Dan encouraged everyone—friends and family included—to use the eRA Commons demonstration site, which simulates the "real thing" with dummy data and accounts: http://commonsdemo.era.nih.gov/commons-demo/.

Dan reported the following eRA Commons registration and usage statistics: 6,500 accounts created, 84 eSNAPS and 1,900 FSRs submitted, 230 reviewers using IAR.

Dan said that a person can be affiliated with more than one school. For example, the person could submit a grant from UCLA, then move to the University of Michigan and submit another grant. The person can be affiliated with both universities.

IAR–eRA Commons Emails

Tracy Soto noted that the email letters under discussion, which she distributed, would be familiar to pilot users only, and she asked for their input (see URL listed under Attachments).

Action: **(IAR Pilot Users) Send corrections, edits and suggested changes for the Reviewer invitation and activation emails to Tracy Soto by June 6.**

Downloading Data to Excel Spreadsheets

Tracy stepped the group through the process for downloading data from select Peer Review reports to an Excel spreadsheet (see presentation URL listed under Attachments). Four reports will be available for downloading with the July release:

- Administrative Data
- Assignments—Master Copy
- Voter Matrix
- Composite Score

The group discussed ways to advertise the availability of these reports. The newsletter was suggested.

Action: **(Tracy Soto) Contact Maddy Monheit regarding an article about the Review reports that will be available for downloading.**

The group agreed upon other reports that would be suitable for downloading:

- Roster/Admin/Mailing (top choice)
- Unique Institutions
- Reviewer email addresses (in block form so easily transferable to an email message)
- Reviewer Expertise (Competency Roster)
- Master List of Applications
- Agenda
- Summary Statement Report with status and dates

Tracy thanked the Excel Reports Focus Group for their work on this project: Eileen Bradley, Bonnie Ellis, Phoung Pham, Brian Wojcik, Tracey David, Kathy Dinterman, Melissa Stick, Diane Lawson, Bobbie David, Thomas Tatham, and Valerie Prenger. She also thanked the developers, Daniel Fox and Lev Zeldin.

IAR Requirements and Changes for July

Tracy presented the IAR list of requirements and possible changes scheduled for the July release, specifically discussing the first ten. Daniel pointed out that, for the third item, when generating preliminary Summary Statements, people should decide initially whether they want the Reviewer's name on the SS or not. It takes a tremendous amount of compiling in the background to generate the SS to begin with. Switching from adding the Reviewer's name to deleting the Reviewer's name would require a complete recompilation of the SS.

1. Allow any SRA or GTA on the roster to see the meeting in IAR.
2. 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.

3. Add Meeting-Wide Option for including Reviewer names in the Preliminary Summary Statement body. The default for this should be No. If the SRA/GTA changes the setting in Control Center all pre-SS will be deleted and rebuilt, user should be alerted to this action.
4. Add link to Control Center on the List of Applications for SRA/GTA users.
5. It is optional for Discussants to submit. Reviewers assigned as Discussants on an application should not be blocked during Read if they didn't submit a critique.
6. Make Application Number a hyperlink for viewing the grant image. The Reviewer should not see the Application Number hyperlink if they are in CD Conflict.
7. Add tags to the list of applications so when user submits or deletes a critique for an application and then clicks back to list of applications they are taken back to the same application instead of at the top of the list.
8. Provide ability to zip all pre-SS into one zip file. This option should appear after the Submit Phase End Date. Individual pre-SS filenames should be named like <PI lastname>_<full grant num>.doc.
9. Add the ability to view the critique on Submit Successful screen.
10. Add an option to view all meeting critiques (in Adobe PDF format) sorted by PI. Modify label of existing View All Meeting Critiques to clarify that there are now two options (By Appl or By PI).
11. Fix sorting on score matrix for lower half and AVG.
12. Eliminate duplicate meetings and clean up old meetings that appear, if there are no phase dates for a meeting then set the closure date equal to the meeting release date.
13. Modify creation of PDF critique to account for style headers in documents submitted by users.
14. Fix sorting problem in critique merge files where subproject critiques are incorrectly appearing before the parent critiques.
15. Wherever they appear, make "Back to List of Applications," "Back to List of Meetings" links larger and in bold font style.
16. Modify invitation emails to clarify that the email is system-generated, that critiques are preliminary, added the meeting dates, changed 24 hours to 2–3 days for account activation and added IAR acronym to the activation email.
17. Modify time validation when user enters phase dates to allow single digit for hour, month and day. Example: Allow 6/5/2003 1:00 AM instead of forcing user to enter 06/05/2003 01:00 AM.
18. Remove logic to check for Phone Reviewers ability to see critiques. Phone Reviewers should have access to all meeting critiques so previously used allow/disallow codes are not necessary.
19. SRA and GTAs should not be able to select and enable themselves in the Control Center.

20. To resolve user confusion, clarify the instructions on the validation screen that appears when you click Submit from the Submit Critique and Preliminary Score page. Also, remove link "back to list of applications" from this screen.
21. On the Submit Critique and Preliminary Score screen, clarify instruction numbers 1, 2 and 5.

Peer Review July 2003 Scope

Daniel Fox presented the new development and maintenance items that will appear in the July release of the Peer Review module.

- **New Development**
  - Rewrite the following four Peer Review reports for output to Excel (*.xls format): Assignments–Master Copy, Administrative Data, Composite Score, and Voter Matrix.
- **Maintenance (Bug Fixes and Small Enhancements)**
  1. To support IAR, add an option with the reviewer delete (assignments and reviewers) to also delete the reviewer's critiques and scores from IAR. Default should be that critiques and scores *are* deleted.
  2. Do not allow user to change status of Summary Statement if it's building draft or building final.
  3. Add the RFA/PA number to the hit list report that runs off of the IRG/SRG Reassignment Screen. RFA/PA is currently on the screen but not included on the report.
  4. Add SRA remarks to Assign Reviewers and IRG/SRG Reassignment screens.
  5. Allow all reviewers on an application to be deleted at once instead of deleting the cell for each one (delete row).
  6. Fix bug so that percentile base used for the score release shows on prepare summary statement screen.
  7. Score mailers fix—Currently, the system is unable to differentiate between a change to the review results and a request for a reprint of the most recent mailer. Consequently, reprints are being treated as a change to review results and the produced mailer can be confusing to the PI. A modification is needed to indicate if the mailer request is a result of a change to the review results. The Peer Review Module will need to be modified to pass this parameter as appropriate. Finally, the job that processes the requests will need to be modified to select the appropriate version of the mailer.
  8. With the July release, all IMPAC II modules will be required to use City, State and Zip fields (instead of or) in addition to Line 5 for addresses. Summary Statement Tops, PI and PO Addresses on Mailers must be modified and all Peer Review reports that display address information must be tested.

9. With the July release, changes to degrees for all IMPAC II modules are planned. These changes include a new hierarchy of categories corresponding to degrees. The degree list of values will be shorter but users will be able to enter and categorize new degrees.

Announcement

Tracy Soto is moving to a new position in the Architecture group. She'll continue to be an active member of RUG as well as analyst for Internet Assisted Review.

Mark Siegert will take over as analyst for Peer Review.

Attendees

Binder, Roberta (NIAID)
Bradley, Eileen (CSR)
Cecil, Christy (NIMH)
David, Bobbie (CSR)
Derfilinger, Brenda (CSR)
East, Doris (NHLBI)
Ellis, Bonnie (CSR)
Fox, Daniel (NGIT)
Hall, Dan (Z-Tech)
Hausch, George (NIDCR)
Lassnoff, Cynthia (NIAID)
Moen, Laura (NIGMS
Musto, Neal (NIDDK)
Nordstrom, Robert (CSR)
Petrosian, Arthur (CSR)
Pham, Phung (NCI)
Richardson, Carolyn (NCRR)
Seppala, Sandy (LTS)
Sim, Hua-Chuan (NLM)
Soto, Tracy (OD)
Wojcik, Brian (NCI)
Zeldin, Lev (NGIT)