Reviewer's Tutorial for Using Internet Assisted Review (IAR)

Many of you will find using the IAR system to be easy and intuitive—at least that's the way we tried to design it! If you feel comfortable just exploring the system on your own, go ahead—you're not going to hurt anything.

For those of you less comfortable with new software, or for those of you who'd like to learn some of the less obvious features, this tutorial is for you.

General Caution: When using IAR, with a single exception (dealt with later, slide 31), you should ***not*** use the Back button on your browser! Use on-screen navigation buttons to move from screen to screen, or your actions will not be recorded.

National Institutes of Health (NIH)

Department of Health and Human Services

OER Office of Extramural Research

The Tutorial is divided into nine parts:

1. What is IAR? What are the "phases?"

2. Obtaining your account, user name, and password.

3. Login.

4. Submit Phase.

5. Read Phase.

6. Edit Phase.

7. Printing.

8. Other hints and tips.

9. The unhappy path: Dealing with problems and errors.

The entire tutorial follows at this site, or you can visit each of the nine parts at its individual site as you work through the phases or whenever you find you want to check on something.

What is IAR? What Are the "Phases?"

What is IAR? IAR (Internet Assisted Review) provides a method for reviewers to submit their preliminary critiques and preliminary scores before the review meeting. At a time determined by your Scientific Review Administrator (SRA), you will be able to view not only your own preliminary critiques and scores, but those of other reviewers (provided you are not in conflict with an application). By having a chance to view the critiques of other reviewers early on, you can come to the review meeting better prepared to either defend your own position or to modify your opinion based on the comments of the other reviewer(s).

In addition, for those study sections that practice streamlining (not discussing or scoring a portion of the applications), IAR allows your SRA to consider your preliminary scores in determining a tentative streamlining list. Your SRA will instruct you about when scores are due and will let you know when to check for preliminary streamlining decisions.

What Are the IAR Phases?

There will always be two phases of IAR and sometimes there will be three phases.

1. **Submit Phase.** During this period of time, you will be allowed to submit your own preliminary critiques to the Web site, but you will not be allowed to see the critiques of others. This phase starts when you get an email asking you to register for the meeting and generally ends several days before the meeting.

2. **Read Phase.** During this period of time, you will be able to see the critiques of others, but you will not be allowed to modify any submitted critiques. If you have not yet submitted a critique for an assigned application, you will be allowed to do so; until that task is done, you will be blocked from viewing other critiques for that application. This phase starts when the Submit Phase ends; the Read Phase generally ends close to the meeting.

What are the IAR Phases?
(continued)

3. **Edit Phase.** Your SRA will let you know if there will be an Edit Phase to your meeting. During this period of time, you will be allowed to replace your original critiques with revised versions that reflect your final opinions based on discussion at the review meeting. Your SRA may have asked for your notes as a Discussant on an application. If so, a new file with those notes can be submitted using IAR. Finally, if you made substantive comments on an application on which you had no formal assignment role, the system will allow you to submit those comments as well. This phase starts when the Read Phase ends; the Edit Phase generally ends a few days to a week after the review meeting.

Obtaining Your Account, User Name and Password

General: You will access IAR through what is called the Commons. The Commons, an evolving part of the NIH system, is meant to serve as an interface between the NIH and external users such as reviewers, applicants, and institutions. Commons users will (eventually) have access to scores and summary statements on line and will be able to submit their non-competing continuation applications through the Commons.

The first time you access the Commons, you will need to establish your user name and password (your choices, within constraints). You will also be asked for some basic information—some required, some optional. Once you "submit," NIH personnel will compare the data you submitted with existing records in the NIH database. In one business day, you will be informed (by email) that your data have been verified and that you may now use the Commons.

Once you have registered, you will not be asked to do so again. You will be able to use your User Name and Password for all Commons functions, including all future review meetings using IAR.

Specific Meeting Procedures

When your SRA has finalized your review assignments (generally 4–8 weeks before the meeting), he or she will "enable" you to access the system. If you are already registered with the Commons, you will be sent an email directing you to the Commons Web site to access IAR. An example is included on slide 11; you can skip the following three slides, labeled "(1st time users only)" if you are already registered with the Commons.

If you are not yet registered with Commons, you will need to do so before you can use the IAR system. The following slides guide you through the process of obtaining your NIH eRA Commons User Name and Password. Again, you will only need to do this once.

(First-time users only). Example email inviting you to register with NIH eRA Commons to use IAR

Subject: RE: Commons IAR Reviewer Invitation

From: Finest, SRA
Sent: Tuesday, December 03, 2002 2:09 PM
To: Reviewer, Best
Subject: Commons IAR Reviewer Invitation

Dear Reviewer:

Thank you for agreeing to be a participant on a peer review panel for ▓▓▓▓▓▓▓▓ meeting. To submit your written reviews electronically, you will need to log on to the NIH Commons eRA Internet Assisted Review (IAR) website with a user name and password. To establish that user name and password, we have set up a special URL (address on the Internet) that is unique to you. Open your Web browser and go to the URL http://impacwebdev2.oer.od.nih.gov:8059/commons/initReviewAcct.do?code=▓▓▓▓▓▓▓▓.
(You can copy and paste this address into the "Location" window of your browser, and press Enter.) Follow the instructions on the screen to enter information about yourself and select your user name and password.

After submitting your registration request, you should receive an email within 24 hours indicating that your account is active.

Once your account is active, you may log in to IAR. If you have questions or problems setting up your account, please call or email the NIH eRA Helpdesk at 301-402-7469 or 866-504-9552 or commons@od.nih.gov.

Thank you for your time and effort.

Sincerely,

FINEST SRA, Ph.D., MD
Scientific Review Administrator
REVIEW BRANCH, DEA, NIZZZ
ROOM xxx, 6707 DEMOCRACY BOULEVARD
NATIONAL INSTITUTES OF HEALTH
BETHESDA, MD 20892-6600

Phone: (301) 555-5555

Address: http://impacwebdev2.oer.od.nih.gov:8059/commons/account/IARAccountCreate.jsp;jsessionid=d8ca3025feef490fb379e2db490debe0

NATIONAL INSTITUTES OF HEALTH
eRA Commons

Welcome Guest
Institution:
Authority:

Home	Links	Help

Create a New Account

Account Form

- Please enter the required fields to create an account.
- * indicates required field.

Account Information

User Name *	
Password *	
Re-type Password *	
First Name	
Middle Name	
Last Name *	
Phone *	
E-mail *	
Organization	
Birth Date	(mm dd yyyy) __ / __ / __
SSN	(123456789)

Submit   Reset   Cancel

TUTORIAL NOTES: Make up your own User Name, with no spaces. Password should be 6 or more characters. An alpha-numeric mix is encouraged. Including your birth date and SSN on this secure site will help to avert intermingling of data with other users having the same name as yours; while all efforts are made to avoid this, it remains a remote possibility.

(First-time Users Only)

After you "submit" the information shown on the previous page, you will see a message confirming that your account has been set up but informing you to wait for 24 hours (one business day) for the information to be verified. (Note: if you get an error message that your chosen user name has already been assigned to someone else, you must select another. You might add a 1 or a 2 before or after your preferred user name and try that.) You should expect another email after the verification period (see below) informing you that you may now use the Commons (and thus, IAR). You will also be directed to the NIH eRA Commons Web site (https://commons.era.nih.gov/) to log in to IAR.

Subject: NIH eRA Commons:Your reviewer account, BESTREVIEWER, has been activated.

```
From: Commons (NIH/OD)
Sent: Tuesday, December 03, 2002 2:31 PM
To: S
Subject: NIH eRA Commons:Your reviewer account, BESTREVIEWER, has been
activated.


An NIH eRA Commons account has been created for: BESTREVIEWER. To access the NIH eRA Commons, you must use the password which
you submitted when you created this account. Our password policy states that passwords must contain a minimum of six
characters. For additional protection, please include a combination of letters and numbers.

To log on to the NIH eRA Commons, click on this URL: https://commons.era.nih.gov/


For questions, contact your institutional coordinator or the NIH eRA Help Desk at  1-866-504-9552 (tty: 301-451-5939) or
commons@od.nih.gov
```

If you have already established your User Name and Password at the NIH eRA Commons, you will get the following email when your SRA "enables" you for the review meeting:

From: SRA, Finest
Sent: Monday, December 09, 2002 4:30 PM
To: Reviewer, Best
Subject: Commons IAR Reviewer Invitation

Dear Reviewer:

Thank you for agreeing to be a participant on a peer review panel for [Acronym for Study Section] meeting. To submit your written reviews electronically, you will need to log on to the NIH Commons eRA Internet Assisted Review (IAR) website with a user name and password. Our records indicate that you have previously established an IAR user account.

Your user name is [whatever you made up]

Please open your Web browser and go to the NIH eRA Commons URL https://commons.era.nih.gov/commons (You can copy and paste this address into the "Location" window of your browser, and press Enter.) Follow the instructions on the screen to log in to Commons. After successfully logging on, click on the IAR menu tab to access IAR.

If you have questions or encounter problems accessing IAR, please contact me or call the NIH eRA Helpdesk at 301-402-7469 or 866-504-9552.

Thank you for your time and effort.
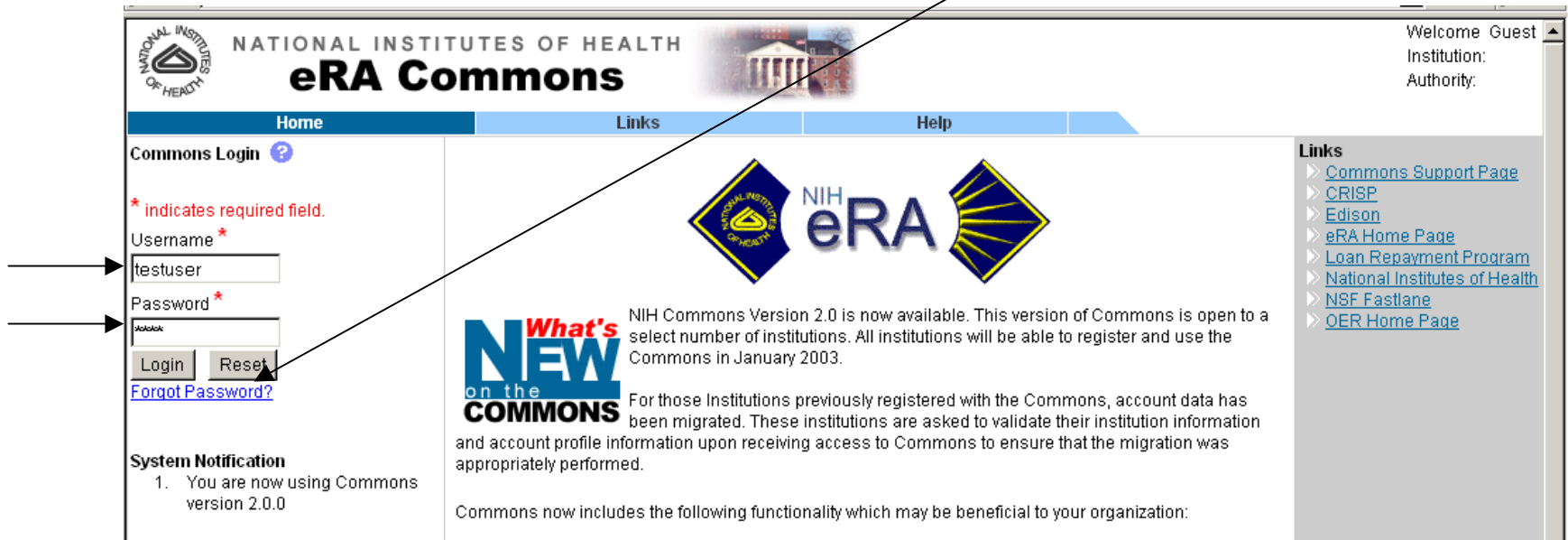
Sincerely,

Finest SRA, Ph.D.
Scientific Review Administrator
ACRONYM Study Section
Address Information
Bethesda, MD 20892
Phone: (301) 435-nnnn

3. Login

Now that you have your User Name and Password, enter them on the NIH eRA Commons Home Page (https://commons.era.nih.gov/) and click Login.

If you have forgotten your password, click on the "Forgot Password" link.

If you have forgotten your password, fill in the required information and press Submit. You will receive an email containing a temporary password that will allow you to login. Once you have logged in, you will be asked to reset your password. Try to pick one that you will remember this time!

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eRA Commons

Welcome Guest
Institution:
Authority:

Home	Links	Help	

Reset Password ❓

User ID [   ]
Email Address [   ]
[Submit]

After a successful login, the screen below will appear. The Personal Profile button takes you to a site for maintaining your personal information, which will now be used by NIH staff for a variety of purposes.

To access IAR, press the IAR button.

4. Submit Phase

This section of the IAR User's tutorial will lead you through the process of submitting your preliminary critiques. The tutorial will show you how to proceed with picking your meeting, finding and selecting an application, submitting your critique, entering a score, and, finally, viewing the critique that you have submitted.
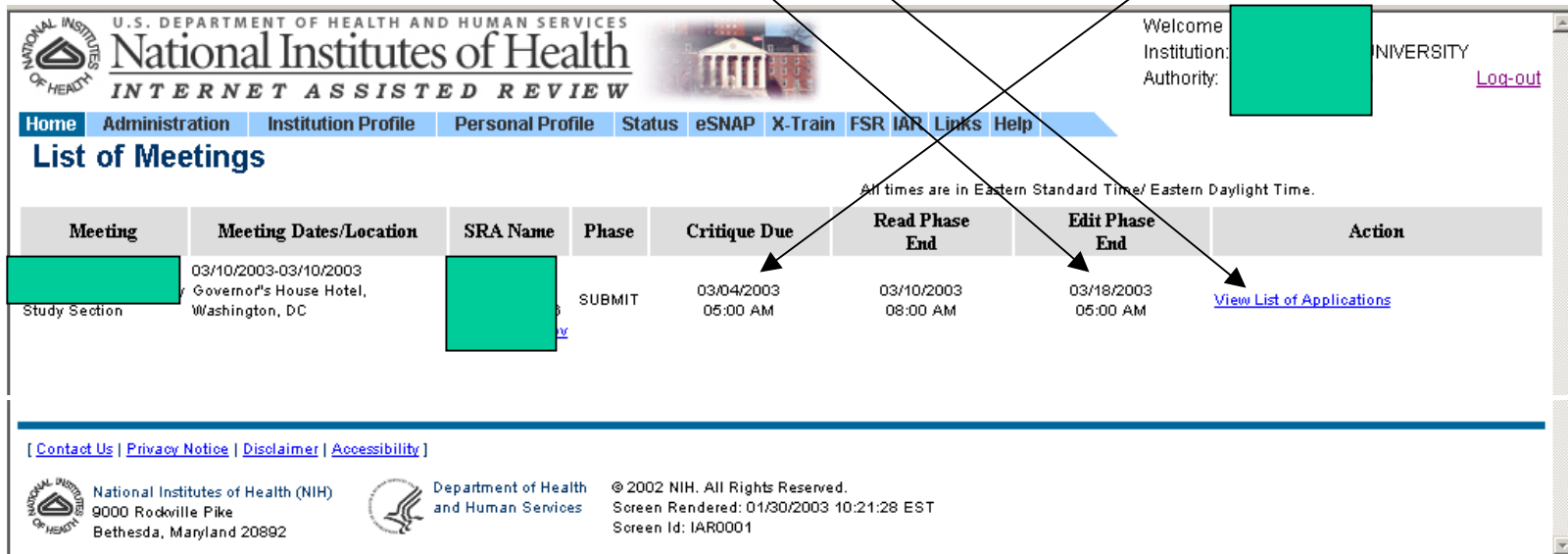
Hint: You may want to open a second copy of your browser so that you can refer to the example screens as you proceed with actually submitting your critiques.

Note: The software for IAR is undergoing refinement and addition of new features. Thus, the live screens that you will be using may be slightly different from the screen shots that you will see in the following slides. However, the functionality should be essentially the same.

Picking Your Meeting

If you have agreed to participate in more than one review meeting, locate the meeting using the acronym and date supplied to you by your SRA, then click "View List of Applications" in the "Action" column. Note the due date and time for critiques to be submitted.

Note: If the Edit Phase column is blank, there will be no IAR Edit Phase for the review meeting.

Picking An Application

Locate an application (sort and/or scroll as needed), then submit, view, or delete your critique by clicking in the Action column. See the next two screens for hints.

Note: The ability to sort on columns, such as PI name, will be added in the spring/summer of 2003.

Upper Portion of List of Applications Screen

Meeting identifiers, current phase, and due date are informational items displayed in this area, along with hotlink options for different views or actions.

Option to switch meetings.

Option to see all applications

Indicator of current display

List of Applications

Meeting Title:	Respiratory Physiology Study Section	**Meeting Dates:**	03/10/2003-03/10/2003
Meeting Identifier:	RESP	**Critiques Due:**	03/04/2003 05:00 AM
Meeting Phase:	SUBMIT		Eastern Standard Time / Eastern Daylight Time

Back to List of Meetings   List All Applications   List Assigned Applications ◆   View My Critiques

(Default) option to see your assignments only.

Option to see all of your submitted critiques.

Lower Portion of List of Applications Screen

Clicking on underlined column heading will re-sort the display (effective spring/summer 2003).

Application	PI Name	New PI	Title	Assignment Role	Score	Submitted Date	Action
1 R0▓▓-01		Y		Ter 1			[submit]
1 R0▓▓-01				Ter 1	3.0	01/13/2003 10:53 AM	[submit] [view] [delete]

Contact SRA/GTA if you identify any conflicts or assignment discrepancies with IAR

Link to contact information.

New Investigator column (Y = New).

Click in this column to perform an action. Deleting is NOT required before submitting a revision. See instructions from SRA re Discussant assignments.

Submitting Your Critique

Submitted files must be in either MS Word (requires a .doc extension) or Text (ASCII files, with a .txt extension). **Macintosh users: Take note of this need to include file extensions!** Convert your files, as needed, to one of these two formats before submitting. You may need to change Greek characters to English text (e.g., alpha, beta) before converting.

When you press the submit link for an application, the screen on the following slide will appear. Instructions for submitting files using this screen differ for Internet Explorer vs. Netscape (and quite probably for other providers). On the following screens, follow IE: instructions for Internet Explorer and NET: for Netscape.

IE and NET

While this screen is largely self-explanatory, the next five slides are designed to help you find your files using the Browse button.

Note: You cannot submit both a score and an action such as UN/NC; only the action designated by the radio button will be captured.

U.S. DEPARTMENT OF HEALTH AND HUMAN SERVICES
National Institutes of Health
INTERNET ASSISTED REVIEW

Welcome tsotorevp
Institution: WASHINGTON UNIVERSITY
Authority: FSR IAR PI SO   Log-out

Home Administration Institution Profile Personal Profile Status eSNAP X-Train FSR IAR Links Help

Submit Critique and Preliminary Score

Back to List of Applications

1. Save your critiques as MS Word or plain text documents. (*Only MS Word or Text documents can be submitted; files must have an extension of *.doc or *.txt.*)
2. To submit a critique, simply press the Browse button to locate the critique file on your computer or in the text box below, type the critique path and file name on your computer (for example, if you saved your critique as crit1.doc on c: drive - type c:\crit1.doc).
3. If applicable, enter the numeric score or choose a non-numeric option (NR - Not Recommended, UN/NC - Unscored/Non-Competitive, or DF - Deferred).
4. Click Submit button.
5. To update a critique, simply resubmit.
6. To remove critique use Delete Option available on the List of Applications.

Application: 1 R03 AI□□□01
Title:
PI Name:
Assignment Role: Ter 1
Critique File: [   ] Browse...
Score (1.0 to 5.0): ○ [   ]   ○ NR   ○ UN/NC   ○ DF
Please close the critique file on your computer before submitting.

Submit   Reset

IMPORTANT REMINDERS:

The following are part of the review criteria and need to be assessed by the assigned reviewers. This includes:
protection of human subjects from research risks
data and safety monitoring
inclusion of women
inclusion of minorities
inclusion of children
animal welfare
biohazards
This list is not all-inclusive; other criteria may apply for a specific review group.
Contact your SRA for guidance.

IE: Browse window. If your critique is not listed in the Browse ("Choose file") window and you don't know how to find it, skip the next slide and follow the steps on the three subsequent slides. Otherwise, double click on, e.g., "critique 1."
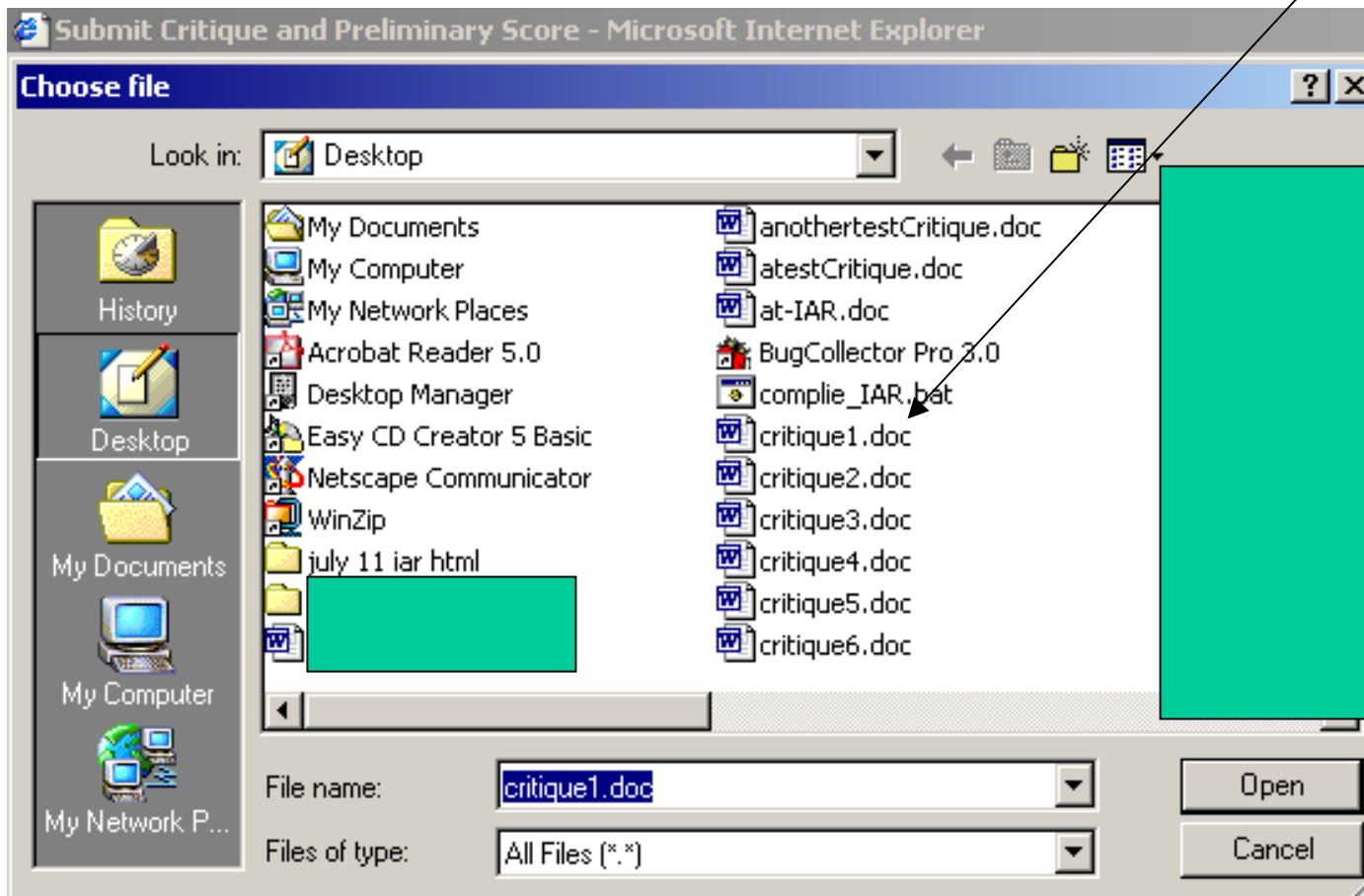
NET: Browse window. Chances are, the "File Upload" window that opens when you click Browse will NOT show you the location of your critiques! To find your critiques, follow the steps on the next three slides.
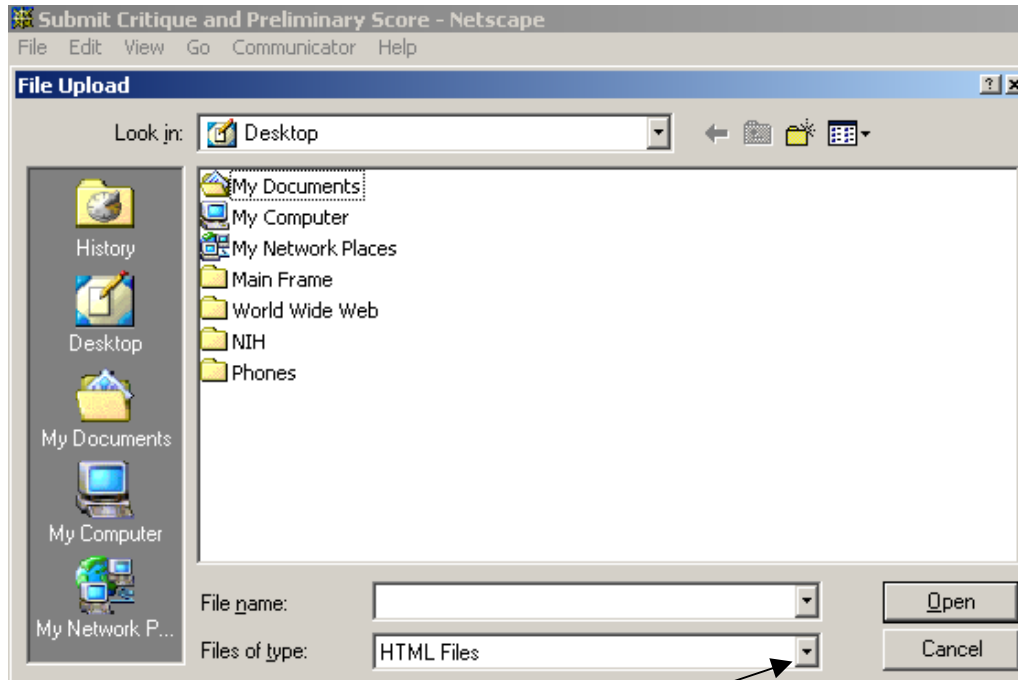
Chances are you will need to change "Files of type" to All files by using the down arrow so that .doc and .txt files will display.

IE and NET

- First, switch to your Word processing program.
- Open one of your critiques.
- Follow your usual commands for performing a "File, Save As" to bring up a window that looks something like this:
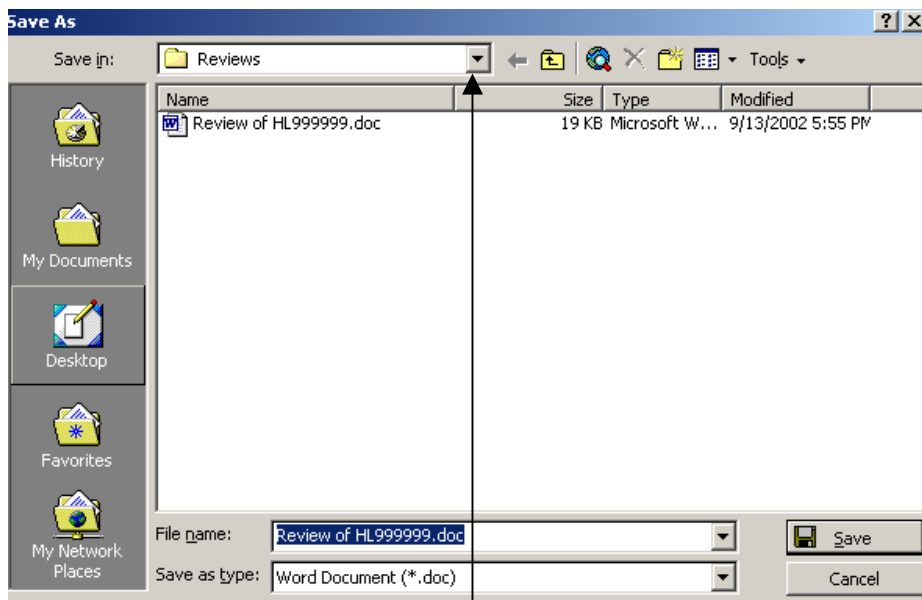
Now, press the down arrow.

IE and NET

You will now see another window, with the folder that your critique is in highlighted.
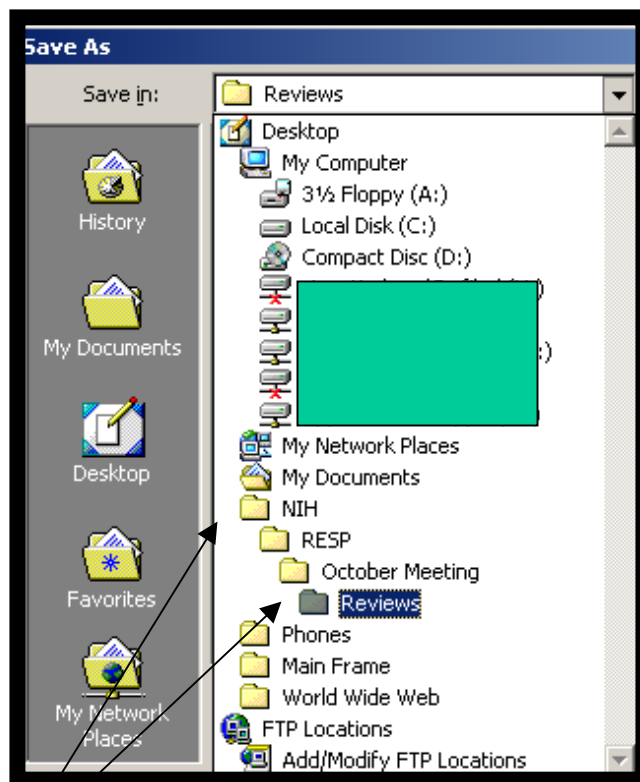
Note the series of cascading folders. This defines the "path" to your critiques. In this case, c:\My Documents\NIH\RESP\October Meeting\Reviews.

Now that you have determined the path to your critiques, let's return to how to "browse" to find them for IAR. Again, when you click the Browse button, your computer's attention will likely be focused somewhere related to your Web browser. All you need do, though, is to click on Local Disk (C:) and sequentially double click on the path of folders that you just determined leads to your critiques. (Or click on A: if your critiques are on a floppy, etc.)
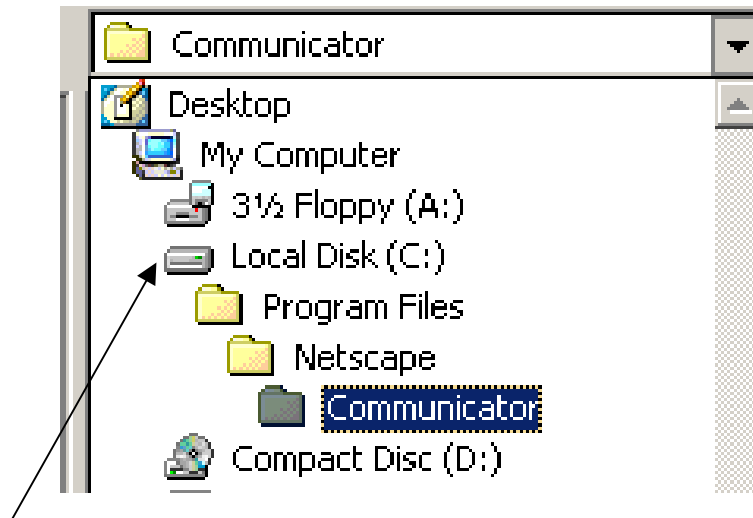
Double click here first, then select folders as you drill down to find your critiques. The window will change with each selection.

When you have found your critique, double click it and press Submit.

After you press Submit, you will see the following confirmation page (upper screen shot). Double check the file name and score, then press Submit again. The lower screen shot will then appear.

U.S. DEPARTMENT OF HEALTH AND HUMAN SERVICES
National Institutes of Health
INTERNET ASSISTED REVIEW

Welcome hardyrev
Institution:
Authority: IAR   Log-out

Home   Personal Profile   IAR   Links   Help

Submit Critique and Preliminary Score
Back to List of Applications

The following information has been entered for the application. To change - press Cancel; otherwise - Submit

Application:	1
Title:	Differentiation
PI Name:	SE
Assignment Role:	Pri 1
Critique File:	critique2.doc
Score (1.0 to 5.0):	4.5
Submitted Date:	12/03/2002 03:03 PM EST

Submit   Cancel

Tutorial Note: Confirmation page, with Submit button.

Home   Personal Profile   IAR   Links   Help

Submit Critique and Preliminary Score
Back to List of Applications

The following information has been successfully submitted:

Application:	
Title:	Differentiation
PI Name:	
Assignment Role:	Pri 1
Critique File:	critique2.doc
Score (1.0 to 5.0):	4.5
Submitted Date:	12/03/2002 03:04 PM EST

Tutorial Note: After you press Submit on the confirmation page, this "success" page will appear. Click Back to List of Applications to continue. (**Note:** This somewhat redundant page will be deleted in spring/summer 2003.)

Viewing Your Critiques

Procedures differ for Internet Explorer and Netscape, so read all five of the following slides.

Once your critiques have been submitted, you may view them on line to verify that the submission process worked properly (although this is not required). If you had to convert your files from WordPerfect or some other word processing program, you should check to see that special characters (Greek letters, etc.) didn't disappear or get converted into nonsense characters.

For a short period of time, your critique will be in the same format as submitted (Word or Text). Within a few minutes, however, it will be converted to a PDF file.

Click here to view <u>all</u> your critiques. Click here for individual critique.

Viewing Critiques in IE

- If you are using IE, the window below will open when you click View.

- Click "Open this file from its current location," then Click OK.
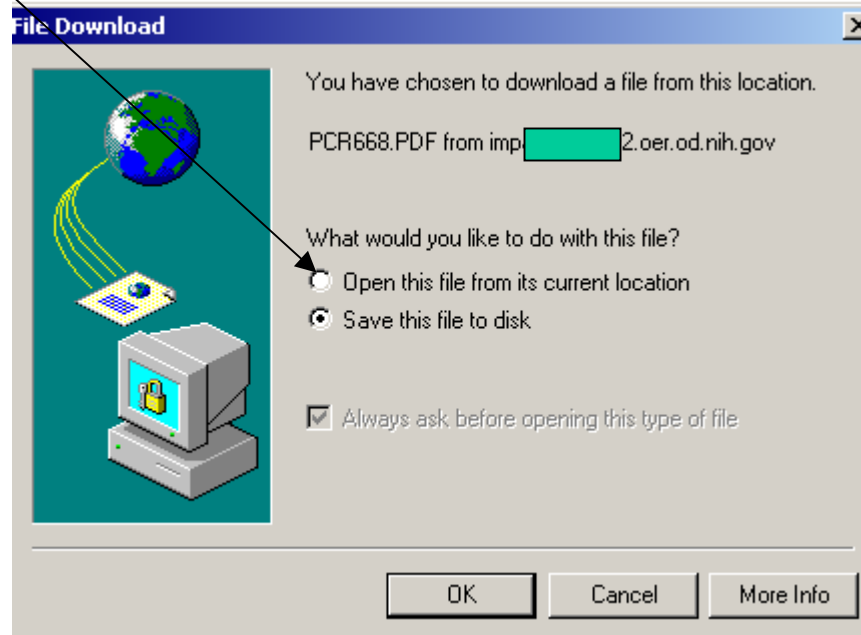
Viewing Critiques in IE
(continued)

A new window will then open to display the selected critique(s). When you have finished scanning the critiques, simply close the window (click the X in the upper right of the window) to close the window and return to the List of Applications screen.

Viewing Critiques in NET

If you are using Netscape, a new window will generally NOT open. Rather, the critiques will appear **in the same Netscape session that you were using for IAR**. No navigation item will be visible to help you navigate back to IAR; you *must* use the Netscape Back button. This is the only instance when you should use this button.

Do not close the Netscape window! It will end your IAR session, and you will have to start over with a login.
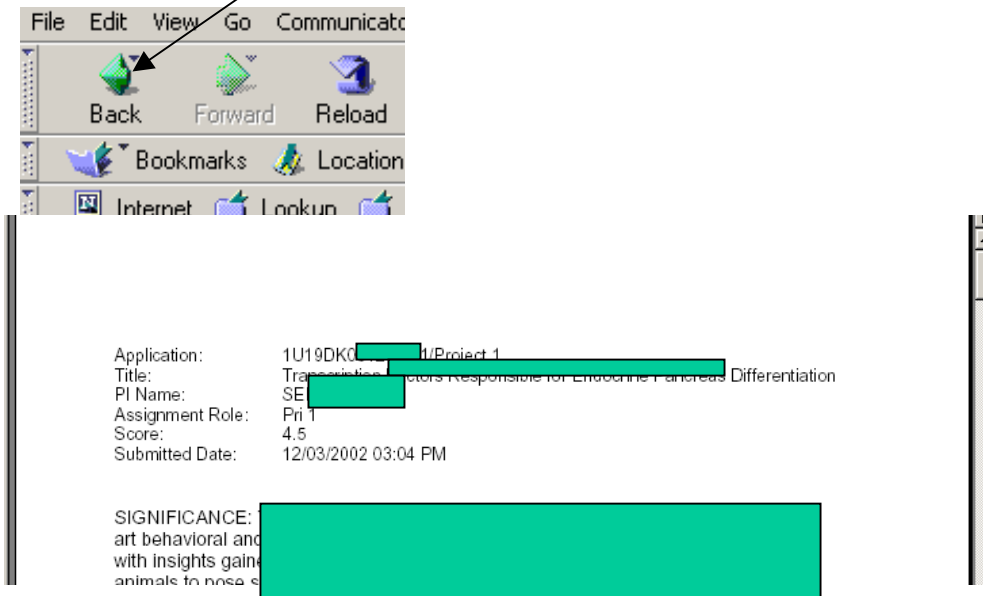
Obtaining the Adobe® Acrobat® Reader

The Adobe Acrobat Reader is required to view the PDF files that contain critiques. While Adobe makes a variety of software, some of which must be purchased, the Reader itself is free.

If you do not already have Acrobat Reader, you can download it from:

http://www.adobe.com/main.html

Look for a link to "Download Acrobat Reader."

Follow the instructions on the page to install it.

5. Read Phase

During this phase, you are allowed to perform the following activities:

1. **Read critiques**: Yours and those of other reviewers (provided you are not in conflict with the application).

2. **Submit late critiques**.

3. **View the score matrix** (again, except for conflicts).

4. **View streamlining information** (if your SRA is using this procedure).

NOTE: If you have a role as a primary, secondary, tertiary, "reviewer" or discussant on an application, you will not be allowed to see the submitted critiques of the other assigned reviewers of that application until you submit your own critique. (This restriction will be lifted in the summer of 2003.)

The following slides will show you how to perform these functions.

Read Critiques—Yours and Those of Other Reviewers

IAR offers you a full range of options for viewing critiques, your own and those of others. Clicking on an option will bring the selected critiques to your screen; some will require more scrolling than others to view in their entirety!

1. All critiques for the entire meeting.

2. All of your own critiques.

3. All critiques for all applications assigned to you.

In addition, you can view critiques on an application-by-application basis. When using this option, you can download all the critiques for the application together or you can view the critiques one at a time.

Finally, you can restrict the list of applications to just those assigned to you or you can select from all applications coming to the meeting.

The following slides lead you through these options.

Note: See Slides 28–32 for important tips on viewing critiques in IE and NET.

Click here to
download (view) all
critiques at once.*

Click here to
download
(view) your own
critiques.

Click here to download
(view) all critiques (yours
and others) for your
assigned applications.*

List of Applications

Meeting Title:		Study Section
Meeting Identifier:		
Meeting Phase:	**READ**	

Meeting Dates: 03/10/2003-03/10/2003
Critiques Due: 01/30/2003 05:00 AM
Eastern Standard Time +Eastern Daylight Time

View Critique Options: View All Meeting Critiques   View My Critiques   View All Critiques for Assigned Applications
List Application Options: List All Applications   List My Assignments Only ◆   View Score Matrix
Back to List of Meetings

Application	PI Name	New PI	Title	Role	Score	Action
1 R03 01				Pri 1	2.2	[view]
My Assignment Role: Ter 1				Sec 1	1.9	[view]
View All Critiques - [PDF]				Ter 1	3.0	[view]
				Dis 1		
				Dis 2		
				Mail 2		
				Average:	2.4	

List Options 1. Click here to change
display of this screen to include all
applications at the meeting.

List Options 2. Click here to change
display of this screen to include
only your assigned applications.

* **NOT AVAILABLE** unless all critiques (including Discussant) submitted!
(This restriction will be lifted in the summer of 2003.)

See next screen for more information on viewing by application.

To view critiques on an application by application basis, first locate the application. If you were not assigned to review it, you need to select "List All Applications." Remember that you can sort on the underlined column headings (effective spring/summer, 2003).

List of Applications - Reviewer

Meeting Title:	Sample Meeting Title		Meeting Dates:	02/02/2002-02/03/2002
Meeting Identifier:	ZRG1 ABCD-E (01) X		Critique Due:	01/02/2002 1:30PM
Meeting Phase:	**READ**		All Times are in Eastern Standard Time/Eastern Daylight Time	

View Critique Options: View All Meeting Critiques   View My Critiques   View All Critiques for Assigned Applications
List Application Options: List All Applications   List My Assignments Only   View Score Matrix

Application	PI Name	New PI	Title	Role	Score	Action
1 U19 [ ]01	AB[ ]NNI		Neoge[ ]us insulin*		2.0	[submit]
My Assignment Role: Sec 1						

You must submit your critique before you can read others.

Application	PI Name	New PI	Title	Role	Score	Action
1 U19 DK[ ]01/Project 4	S[ ]KUS		Gene [ ]Differentiation	Pri 1	2.5	[view]
My Assignment Role: Dis 1				Sec 1	NR	[view]
View All Critiques - [PDF]				Dis 1	1.0	[view]
				Average:		

Once you have located the application, click View All Critiques (for that application) or click the individual critique of interest.

Submit Late Critiques

If you have not yet submitted a critique on an assigned application, you will be blocked from viewing the critiques of others on that application until you do submit. You will also not have the "View Critique Options" of "View All Meeting Critiques" and "View All Critiques for Assigned Applications."

In the action column, you will see the Submit option for that application.

Follow the directions for submitting critiques as outlined in the Submit Phase directions (slides 20–27).

View the Score Matrix

The score matrix is accessed from the list of applications screen by clicking here.

While relatively straightforward, there are some subtleties to the View Score Matrix screen, as described in the following two slides.

Notes about the Score Matrix

1. Preliminary scores are arranged from worst to best for a given application (*not* by primary, secondary, etc.). Non-numeric entries are listed first. **Remember that these are just preliminary ratings and that final scores will be assigned at the review meeting!**

2. An average is only shown when there are no non-numeric scores.

3. Scores are preliminary, are display only, and only reflect entries from assigned reviewers (including discussants).

4. Clicking on the "AVG" column heading will sort the matrix according to score.

AVG	SCORES			
	UN/NC	NR	1.3	
3.1	3.3	3.0	3.0	2.9
1.5	1.5	1.5	1.4	
	NR	1.3		
1.6	2.0	1.1		

Notes (continued)

As always, clicking on an underlined column headings sorts the matrix on that column heading. For the section of screen shown below, there are two options in each column. For the "Application Number" column:

1. Act/IC/Serial# -- This sort clusters applications by "activity" first (activity is NIH-speak for type of applications, such as "regular" (R01), "conference" (R13), AREA (R15), etc) and then on serial number.

2. IC/Serial # --This sort clusters applications by IC (Institute or Center) and then by serial #. For example, all Aging (AG) applications, then all Heart, Lung, and Blood (HL) applications, etc. The serial # is the six-digit number following the IC.

Similarly, the PI Name column can be sorted by Activity first and then name, or just by name alone.

Application Number	PI Name [Conflicts]
Act/IC/Serial# | **IC/Serial#**	**Activity/PI Name** | **PI Name**
2 R01 HL -10	
1 R01 HL -01	SON H [C]
2 R01 HL -05	PHILIP S
1 R01 HL -01	LL IAM H

The [C] indicates that some reviewer on the committee is in conflict.
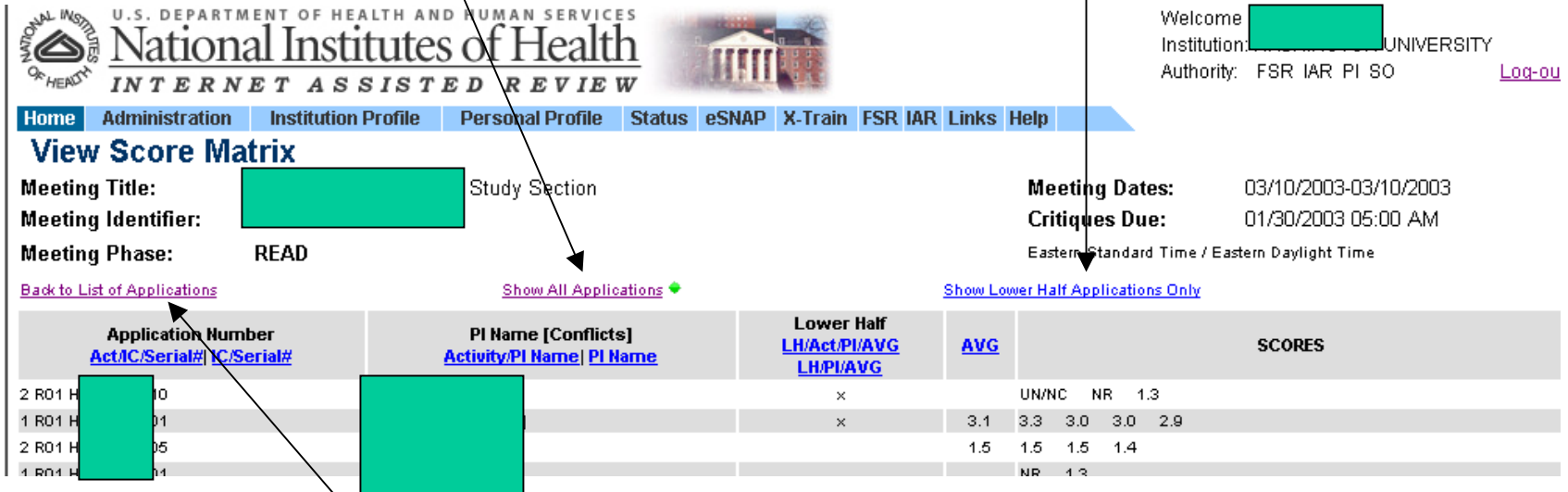
View Streamlining Information

The "Lower Half" column of the View Score Matrix screen is only used for review meetings that streamline. Your SRA will inform you of the criteria used to make this determination and of the timeframe for entering scores and for viewing tentative UN determinations. There are two options for using the "Lower-Half" column to sort the matrix:

1. LH/Act/PI/AVG – Lower-half application would be at the top, sorted first by "Activity" (see previous slide for definition) and then by PI last name. Scored applications would be next, sorted by average score.

2. LH/PI/AVG – Lower-half application would be at the top, sorted PI last name. Scored applications would be next, sorted by average score.

Lower Half LH/Act/PI/AVG LH/PI/AVG	AVG	SCORES			
x		UN/NC	NR	1.3	
x	3.1	3.3	3.0	3.0	2.9
	1.5	1.5	1.5	1.4	
		NR	1.3		
	1.6	2.0	1.1		

Finally, you can see the entire list of applications and scores by clicking here.

...or restrict the list to only lower-half applications by clicking here.

To return to the "List of Applications" screen (for viewing critiques), click here.

Edit Phase

If your SRA elects to have an Edit Phase after the review meeting, you will be informed of what is expected of you.

In general, SRAs use the Edit Phase for the following purposes:

1. To allow reviewers to submit revisions of their critiques after the review meeting so that they better reflect the discussion and/or the final score.

2. To allow reviewers to submit Discussant notes (at the request of the SRA).

3. To allow reviewers (again, at the request of the SRA) to submit written comments on applications for which they were not assigned a role. Typically, if a study section member (not formally assigned to the application) makes a particularly cogent comment during discussion, the SRA may request a few sentences or a short paragraph to be certain of capturing the discussion accurately.

By now, you should be familiar with the options for viewing, listing, and sorting. If not, refer to slides 17–19 and 28.

To submit a revised critique, prepare **and save it** in your word processor and press Submit. You do **not** need to "delete" your previously submitted critique first.

Note: The score matrix will **not** update with actual scores.

Printing

As with any Web page, all IAR screens can be printed.

If a particular screen has a scroll bar, be sure to use the File/Print option rather than doing a "Print Screen," which will only capture the information visible when you press the button.

When *Viewing* critiques in PDF, use the File/Print command in Adobe to print the pages you're interested in.

Other Hints and Tips

This section of the tutorial covers:

1. Returning to this tutorial and obtaining other help with IAR

2. Dealing with Subprojects

3. Telephone Reviewers

4. Mail Reviewers: what you can do, what you can't

5. New Investigators: spotting them, dealing with them

6. Human Subjects, Animal Welfare, Biohazards, Budget considerations

7. SRA/GTA Information: how to find it

8. Viruses

Other Hints and Tips (continued)

1. **Returning to this tutorial and obtaining other help with IAR**

   To return to this tutorial while using IAR, click on Help, then click on Tutorial in the IAR section.

   Other help with IAR, including a Users Guide, can be found by clicking on Home, then clicking on the Commons Support Page under Links and locating IAR.

Other Hints and Tips (continued)
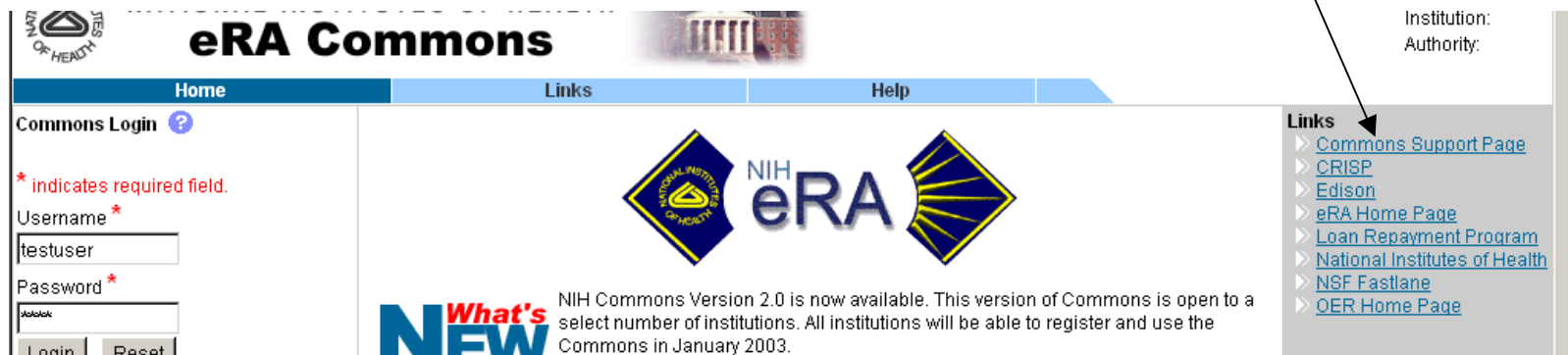
2. Dealing with Subprojects

A. If your committee is reviewing one application with several subprojects, you should see both the application number and the subproject designation (e.g., Project 1, Core A) in the same row of information. The subproject leader/director's name should appear in the PI Name column.

Attempting to sort on the PI Name column will *not* order the subprojects based on the subproject PI Name. The default sort on subproject number will remain.

B. If your committee is reviewing more than one such application, subprojects will always remain clustered with the "parent" application during sorting. Sorting on PI Name will order the applications according to overall PI name, with subprojects and cores displayed according to subproject number/core designation displaying just beneath the "parent" application row.

Other Hints and Tips (continued)

3. Telephone reviewers

Generally, telephone reviewers are assigned to review only one or a few applications and are not sent the box or CD containing all the applications to be reviewed in the meeting. Such reviewers are only on the phone during the review of their assigned applications.

Nevertheless, if you are a telephone reviewer, you will have access to all critiques on which you are not in conflict during the Read and Edit Phases. You may find it useful to scan some of these to help you "calibrate" your scoring.

As always, remember the confidential nature of the review process.

4. Mail Reviewers: What you can do, what you can't

"Mail Reviewers" are most often sent a single application to review, most often to obtain an opinion on a specific portion of the science that cannot otherwise be reviewed by the panel members actually attending the meeting. The decision to use this method is predicated on the assumption that a written document will suffice; that is, no participation in the discussion and no score is needed.

Since access to the other critiques is on a "need to know" basis, then, Mail Reviewers are only allowed to submit and view their own critique and no others.

Other Hints and Tips (continued)

5. New Investigators: Spotting them, dealing with them

New Investigators are applicants who have not yet been awarded a regular NIH grant (R01), FIRST Award (R29) or certain career development awards (K02, K04).

Applications from New Investigators are flagged by NIH for special consideration. Certain review criteria are somewhat relaxed for New Investigators. Your SRA will supply you with more complete guidelines about reviewing applications from New Investigators.

New Investigators can be identified by the Y in the "New PI" column:

Other Hints and Tips (continued)

6. Human Subjects, Animal Welfare, Biohazards, Budget Considerations

You should determine, independent of the information provided by the applicant on the face page of the application, if humans or animals or both are involved in the proposed research, then consult the guidelines provided to you by your SRA and include the appropriate sections in your critique. A reminder is included on the IAR screen where you submit your critiques.

IMPORTANT REMINDERS:

The following are part of the review criteria and need to be assessed by the assigned reviewers. This includes:
protection of human subjects from research risks
data and safety monitoring
inclusion of women
inclusion of minorities
inclusion of children
animal welfare
biohazards
This list is not all-inclusive; other criteria may apply for a specific review group.
Contact your SRA for guidance.

7. SRA/GTA Information: How to find it

If you need to double check on how to contact your SRA or GTA (Grants Technical Assistant), click here (you may need to scroll to see this link).

A new screen will appear with your SRA's and GTA's names, phones, and email addresses.

Other Hints and Tips (continued)

8. Viruses

Whenever a critique is submitted by a user, it is first scanned for viruses before it is stored in the IAR database, using the most up-to-date software. Should a virus be found, the file will be cleaned, if possible, *or the file may be deleted.* In the future (spring/summer 2003), a notice regarding the problem will appear on screen during the session. *In the meantime, you may only notice that your critique has disappeared.*

When viewing an already submitted critique (yours or someone else's), you can be assured that the file you are accessing is virus free.

Unhappy Path: Dealing with Problems and Errors

This tutorial should get you over most rough spots. However, here are two options, if it doesn't.

1. A "Helpdesk" is available to you Monday – Friday, 8:00 – 6:00 Eastern time:

   NIH eRA Commons User Support Branch

   Help Desk 866-504-9552 (Toll Free)

   301-402-7469 (Voice): press 1 for status, 2 to speak with a representative

   301-451-5675 (Fax)

   301-451-5939 (TTY)

You can also reach it via email at: commons@od.nih.gov

Click on "Contact Us" at the bottom of any IAR screen to get this information during one of your sessions.

[Contact Us | Privacy Notice | Disclaimer | Accessibility]

National Institutes of Health (NIH)
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Bethesda, Maryland 20892

Department of Health and Human Services

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Unhappy Path: Dealing with Problems and Errors

2. Should the Helpdesk be unavailable or unable to help you, try your SRA (see slide 54).

Potential Problem Areas

- **Unable to Submit critique, or scrambled result.** Remember that you need to save your critiques in Word or as a Text file, with a .doc or .txt extension. Conversion to text can leave some empty spaces where special characters might have been. Conversion to Word can also result in the insertion of boxes, @ signs, or English letters in place of Greek characters.

- **Forgotten Password.** See slides 12 and 13.

- **Unable to locate your critique on your computer in order to submit.** See slides 21–26 for tips that will help you locate your files, or ask your local Helpdesk for assistance in finding the "path" to your critiques. The Commons Helpdesk may also be able to walk you through this.

Unhappy Path: Dealing with Problems and Errors

- **You entered information but it was not saved.** Remember that you should (almost) never use your browser's Back button to move from screen to screen. The only exception is to exit a critique that you are viewing in Netscape (see slide 31). Also see slide 55 regarding viruses.

- **You finished viewing a critique and your session ended.** If you use Netscape, you must use the Back button to close the view critique window—*not* the X in the upper right or File/Exit.

- **You entered a bad score and clicked UN/NC, but the score did not get saved.** Remember that you are only allowed to press one radio button in the score line. You may choose to enter a numeric score or to click NR, UN/NC, or DF, but combinations are not allowed. See slide 21.

- **You chose a user name but were told to select another name.** All user names in the Commons must be unique, even though your email and password will be different from that selected by another user. Thus, you may need to try adding an extra character (like a 1 or 2) after or before the user name you might have preferred.

Unhappy Path: Dealing with Problems and Errors

- **You would like to see all critiques for the meeting or all critiques for applications assigned to you, but those options are missing**. Remember that you will need to submit critiques on ALL of your assigned applications (including Discussant assignments) for these options to appear. (The requirement for Discussant assignment critique submission will be eliminated in the summer of 2003.)

- **You submitted one critique, but got a message that your session had timed out when you tried submitted the next one.** For the NIH eRA Commons to be available to large numbers of users, each session will "time out" after 15 minutes of inactivity (45 minutes in late March 2003). You may want to prepare several critiques while off line and then submit them sequentially during a shorter online session.

- **Suggestions?** If you have thoughts on how this tutorial could be improved, please send an e-mail to commons@od.nih.gov. Thanks!