Review Users Group Meeting

Date: Mon., July 14, 2003
Time: 1:00–3:00 p.m.
Location: Rockledge 2, Room 3087
Advocate: Eileen Bradley
Analysts: Tracy Soto (IAR), Mark Siegert (REV)
Next Meeting: TBD

Action Items

1. (All) Distribute list of Peer Review functionality concerning Loan Repayment Program applications to ICs. Send any questions about it to Sara Silver.
2. (All) Email Krishna Collie to participate in the Committee Management (CM) Web pilot.

Attachments

- eRA Address and Degree Changes: July 2003 Release: http://era.nih.gov/Docs/RUG_Address_Degree_Changes_July.pdf
- Requirements and Prospective Changes to IAR for August release: http://era.nih.gov/Docs/IAR_Features_July_Scope.pdf

Peer Review August and October Releases

Tracy Soto explained that the August release of the Peer Review module will contain all of the new development, small enhancements, and bug fixes presented at the last RUG meeting. The new version of Peer Review will—

- Feature four reports available for downloading into Excel spreadsheets (*.xls format), including: Assignments—Master Copy, Administrative Data, Composite Score, and Voter Matrix.
- Provide users the option to delete the reviewer's critiques and scores from Internet Assisted Review (IAR) when they remove reviewers from Peer Review.
- Prohibit users from changing status of Summary Statements if it's building draft or building final.
- Include the RFA/PA number to the hitlist report that runs off the *IRG/SRG Reassignment* screen.
- Display SRA remarks on the *Assign Reviewers* and *IRG/SRG Reassignment* screens.
- Allow a batch deletion of reviewers on an application instead of deleting one at a time.
- Display percentile base used for the score release on *Prepare Summary Statement* screen.

- Indicate to users if a score mailer request is a result of a change to the review results. Previously, the system was unable to differentiate between a change to the review results or a request for a reprint of the most recent mailer. Consequently, reprints were treated as a change to review results and the produced mailer confused many Principal Investigators.
- Feature City, State, and Zip fields in addition to Line 5 for addresses on all Summary Statements and PI and PO Mailers. This requirement is in accordance with the overall eRA Project decision to replace Address Line 5 with City, State, and Zip fields.
- Feature a new hierarchy of categories corresponding to degrees. This degree list will be incorporated into all IMPAC II modules.

For the October 2003 release, four reports will be deployed:

- Program Official's Report
- Summary Statement Status and Data Report
- Unique Institution Project Personnel Report
- Roster/Admin/Mailing Report

Internet Assisted Review (IAR) August Release

Tracy reviewed the major enhancements to the Internet Assisted Review (IAR) pilot that are scheduled for the August release. The new version of IAR will—

- Provide users the option to include reviewer names in Preliminary Summary Statements. The default will not include reviewer names.
- Ensure that discussants on applications will not be blocked during Read if they did not submit a critique.
- Include an Application Number hyperlink for viewing the grant image.
- Provide users the option to zip all Preliminary Summary Statements (pre-SS) for each application into one zip file. This will allow users to download all pre-SSs quickly.

Person Degree and Address Changes

Sara Silver presented the Person Degree and Address Line 5 changes scheduled for the July/August release.

Address Line 5 Changes

Line 5 of the address fields—city, state and zip code information—will be retired (*see Slide #2*). The retirement of Line 5 is a first step in a much larger goal to identify addresses by components in the eRA system. Also, standard U.S. Postal regulations do not permit five-line addresses.

For July, the information in Line 5 will be parsed into separate city, state, and zipcode fields. Users will no longer be able to enter information into Line 5 and will have to check the edit addresses screen carefully to ensure that city, state, and zip code information has been transferred to the individual fields. There also will be a button on the screen that will transfer the city, state, and zip code automatically to the individual fields should users find that the information is still located in Line 5.

The retirement of Line 5 and the creation of separate fields for city, state, and zip code information will require—

- Conversion of existing data in Address Line 5(*see Slide #4*).
- Modification to address screens (*see Slide #5).*
- Modification to miscellaneous documents, including reports, mailers, summary statements, etc., where address is displayed (*see Slide #7).* Line 5 will be eliminated from these documents.

Principal Investigator (PI) Degree Changes

There will be three major changes to PI degrees:

- *Degree Codes and Categories*—(*see Slides #10-15*). There will be a new list of degree codes (*see Slide #11*) and new categories and subcategories of degrees (*see Slides #12)*. These changes will ensure better tracking and reporting of degree codes in IMPAC II.
- *"Earned degree" information*—(*see Slides #16-17).* Existing null data for the *degree_status_code* will be converted to "Yes" or "No" (*see Slide #17).* This change will remedy problems with interpreting the *degree_status_code* (*see slide #16).*
- *Duplicate degree records*—(*see Slides #18*). There will be changes to remove and delete duplicate records from IMPAC II. Specifically, there will be a warning message in the application that alerts users to the creation of a duplicate degree. All degree records that are obvious duplicates will be deleted. Individuals with more than one of a specific type of degree will store that degree once for each occurrence.

Loan Repayment Program

Sara distributed a list detailing what functions users can perform in the Peer Review module concerning Loan Repayment Program (LRP) applications. Apparently, there has been much confusion about this matter among the Review community especially about what features should be used for LRPS. For example, LRP meetings shouldn't be released and summary statements for LRP applications should not be done.

Sara emphasized that it is the responsibility of RR staff to enter LRP applications into the system. She explained that although LRP applications are submitted electronically to the LRP office, they cannot be processed electronically at this point in time. The LRP office is required to code LRP applications into 398 documents, print these applications, and distribute them to ICs. The RR staff then must enter the information manually into IMPAC II.

Sara asked group members to disseminate this list to their respective ICs and forward any questions to her directly.

Action: (All) Distribute list of Peer Review functionality concerning Loan Repayment Program applications to ICs. Send any questions about it to Sara Silver.

Update and Demonstration of CM Web

Krishna Collie presented a live demonstration of the Committee Management (CM) Web, scheduled for release in August. The CM Web will allow users to edit, add, and manipulate both meetings and rosters. For the time being, all other functions will have to be conducted in the client-server application until all of the functionality in the client-server application is successfully transferred to CM Web. For August, CM Web will include enhanced roster features, SREA functionality, and five reports, including, Meeting Roster, Committee Roster, Mailing Labels, Invitation to Travel, and the 1715 Voucher Report.

CM Web features two navigation menus at the top of the screen. The first menu includes *Home, Meeting*, and *Help* and the second menu includes *Query Meeting* and *Meeting Data.*

The *Query Meeting* page allows users to search for meetings and specific details concerning those meetings. Searches can be conducted using a variety of search parameters (e.g., Acronyms, IC, Council Round, Date, Workgroups, Executive Secretary, etc.). At the bottom of the screen, there are options to run the query, clear the query, or save the query as a default.

The *Meeting Data* page displays a wealth of information about meetings. At the bottom of the screen, there are a range of options (e.g., Add Meeting, Edit Meeting, Delete Meeting, Admin Expense, System IDs, Workgroup rates, Generate Roster, etc.). Currently, the Meeting Data page only contains active meetings. Krishna explained that, for now, users will have to use the client-server applications to locate inactive meetings. Eventually, CM Web will provide all the functionality of the client-server application. At that point, the client-server application will become obsolete.

Finally, Krishna encouraged any group members interested in participating in the CM Web pilot to contact him directly.

Action: (All) Email Krishna Collie to participate in the Committee Management (CM) Web pilot.

Attendees

Armistead, Allyson (LTS)
Austin, Patty (OER)
Benjamin, Angela (NIDA)
Bilgrami, Sadiya (NGIT)
Binder, Roberta (NIAID)
Bradley, Eileen (CSR)
Burns, Amy (LTS)
Cecil, Christy (NIMH)
David, Bobbie (CSR)
David, Tracey (CSR)
Derfilinger, Brenda (CSR)
East, Doris (NHLBI)
Ellis, Bonnie (CSR)
Fox, Daniel (NGIT)
Githens, Sherwood (NCI)
Hausch, George (NIDCR)
Lassnoff, Cynthia (NIAID)
Moen, Laura (NIGMS
Musto, Neal (NIDDK)
Nordstrom, Robert (CSR)
Petrosian, Arthur (CSR)
Pham, Phung (NCI)
Prenger, Valerie (NHLBI)
Richardson, Carolyn (NCRR)
Richters, John (NINR)
Rigas, Marc (NCRR)
Sim, Hua-Chuan (NLM)
Sinnett, Everett (CSR)
Soto, Tracy (OD)
Wojcik, Brian (NCI)
Zeldin, Lev (NGIT)