

REVIEWER GUIDE TO ASYNCHRONOUS ELECTRONIC DISCUSSIONS

Thank-you for agreeing to review NIH grant applications using AED. While this review format eliminates the need to travel, it does introduce some additional challenges for participation. This guide will help you overcome many of these participatory challenges.

These instructions are intended to provide reviewers with an overview of the AED site to help them navigate the main functionalities needed to participate in an AED review meeting and review some important considerations regarding AED meetings.

AED SITE OVERVIEW – BASIC SCREENS, NAVIGATION AND FUNCTIONALITIES

Logging in: Before the meeting reviewers will receive an email (from the SRO for the meeting) providing the link to the meeting site. The site will be available only on the day of the meeting. To log into the site, click the link (or open a browser and copy and paste the link provided by the SRO). When the login page opens, add your user name (this is your eRA Commons user name) and the AED password provided by the SRO. Then, click on the “Sign In” button.

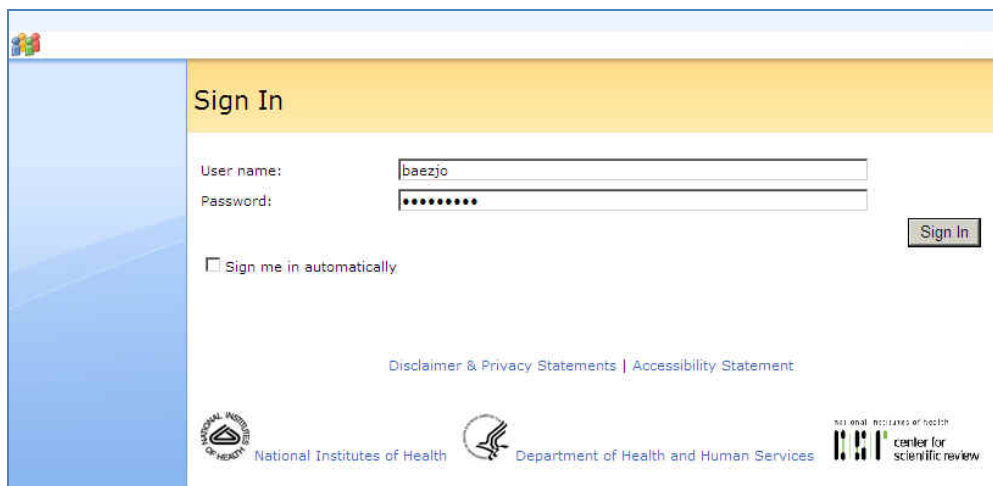


Figure 1 – Log in screen

Before reviewers are granted access to the meeting site you will see an ‘AED Disclaimer Notice’. This is a reminder of the confidentiality of the meeting. It also states that no material should be saved, printed or disseminated in any format. If you accept these conditions, click on the “I Accept” button. Before the first screen listing the applications included in the review meeting opens, you will be asked if you want to close two windows, answer “Yes” to both questions.

AED Main screen (Figure 2). This screen is central to the AED review platform. It provides an overview of the meeting and allows users to navigate to other screens as well as send notes to the SRO. The following links are displayed for each application being reviewed:

- **Application number**
- **Applicant name**
- **Number of unread discussion threads**
- **Application status** (if an application is a candidate for being ‘Not Discussed’ this information will be displayed during the introduction phase.)
- **Objection button.** During the introduction phase an Object button will be available if an application is a candidate for being ‘Not Discussed’. If a reviewer clicks the ‘Object button’ the application will be discussed.
- **Reviewer role**
- **Score rank**

The main screen displays the SRO announcements, the phase of the meeting and links to the following areas of the AED review platform:

- Deadlines: this shows the different phases of the meeting,
- Links: this shows the links that are important for the meeting.

The main screen also allows reviewers to read and send messages to the SRO using the links provided at the top of the screen.

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center for scientific review Asynchronous Electronic Discussion

Welcome, **hendrixji**
Messages: [None](#) [Logout](#)
[Send Note to SRO](#)

**** ZRG1 AED-V4.0 TRAINING**

Announcements

[Welcome](#) boundst | 10/11/2009 9:59:22 AM **Phase**
Introduction
Ends: 10/11/09 10:20

Welcome to the AED training site. *We hope you find this site useful for your next meeting.*

Additional
[Deadlines](#)
[Links](#)
[View Discussed Apps](#)

Application Number	PI Name	Unread	Total	Status	Object	Role	Prelim. Rank
1P31AED111111-01-705	JEFFERSON, THOMAS	0	0			Reviewer 2	1
1P31AED111111-01-704	REAGAN, RONALD	0	0			Conflict	1
1P31AED111111-01-690	LINCOLN, ABRAHAM	0	0			-	3
1P31AED111111-01-695	HOOVER, HERBERT	0	0	Candidate	<input type="button" value="Object"/>	-	4
1P31AED111111-01	WASHINGTON, GEORGE	0	0	Candidate	<input type="button" value="Object"/>	Reviewer 1	5

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Figure 2 – Main Screen

Objecting to Applications Being Designated as “Not Discussed” Candidate: During the Introduction Phase, a reviewer can object to an application being designated as “Not Discussed”. To object, click on the “Object” button for the application. A dialogue box appears explaining what ‘Object’ means and asking if you really want to discuss the application designated as “Not Discussed” [NOTE: designating an application as ‘Not Discussed’ is based on the preliminary average overall scores posted by the assigned reviewers (Figure 3)].

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Welcome, **hendrixji**
Messages: [None](#) [Logout](#)
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Windows Internet Explorer

Are you sure you want to discuss this application?
Not Discussed applications are not discussed, so by clicking OK you indicate your desire to discuss.

Application Number	PI Name	Unread	Total	Status	Object	Role	Prelim. Rank
1P31AED111111-01-705	JEFFERSON, THOMAS	0	0			Reviewer 2	1
1P31AED111111-01-704	REAGAN, RONALD	0	0			Conflict	1
1P31AED111111-01-690	LINCOLN, ABRAHAM	0	0			-	3
1P31AED111111-01-695	HOOVER, HERBERT	0	0	Candidate	<input type="button" value="Object"/>	-	4
1P31AED111111-01	WASHINGTON, GEORGE	0	0	Candidate	<input type="button" value="Object"/>	Reviewer 1	5

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Figure 3: Objection confirmation window

Discussing applications: When the discussion phase starts reviewers can choose to see a list of all applications or only those that are to be discussed by clicking on the button “View Discussed Apps” available in the center right of the main screen.

To start a discussion thread, click on the name of the PI or the application number displayed in the main screen. The application home screen will open (Figure 4). This screen will display:

- **Name of the applicant**
- **Application number**
- **Title of the application**
- **Status of the application** (the sentence “This application is being discussed” is displayed when an application is being discussed)
- **Application scores:** Criteria scores and overall impact scores given by the assigned reviewers are shown in the IAR Preliminary Scores Table. The Discussion Scores Table is reserved for reviewers to add scores as an indication of their enthusiasm for the application as the discussion progresses. The final score column will be available for reviewers to add their final scores during the final score phase. To add a discussion criteria, discussion overall impact score or the final score for an application, use the dropdown menu. Note that the dropdown menu for final scores will be available only during the final scoring phase of the meeting.
- **Human subject/Vertebrate Animal and Budget:** For applications involving human subjects and/or vertebrate animals there will be links to the section where comments should be posted.

The screenshot shows a web application interface for an application home screen. At the top, it displays the application number **1P31AED111111-01-690 - LINCOLN, ABRAHAM** and the project name **Project 1: AED Test 1**. A status message indicates "This application is being discussed." The main section is titled "Application Scores" and contains two tables. The first table, "IAR Preliminary Scores", has columns for Sig, Inv, Inn, App, Env, and Ove, with rows for reviewers: guthriear (Rev1), havensr (Rev2), joplinj (Rev3), baezjo (Mail1), hendrixji, butterfieldp, and reviewerp. The second table, "Discussion Scores", has the same columns and rows, with dropdown menus for each cell. A "Final Score" column is also present. On the right side, there are links for "Open Discussions" (Application Discussion, Animal Subject Discussion, Budget Discussion), "Application Documents" (Program Announcements (PA07-030)), and "Additional Documents". At the bottom, there are sections for "Application Discussion", "Animal Subject Discussion", and "Budget Discussion", each with a "Return To Top" link and a "Post a new [type] comment" link. Navigation buttons for "Previous Application", "Next Application", and "Go" are also visible.

Figure 4: Application panel – note links to application discussions, animal subject discussions and budget discussions

Posting a comment: To post a new discussion thread, click on the Application Discussion link, or scroll down the screen and click on the link “Post a new application comment” on the right of the screen (you can also post a reply to a comment posted by another reviewer). The AED Text Editor will open in a new window allowing reviewers to enter text (Figure 5). In this window reviewers can add a subject for their thread and add an attachment and/or write comments. The text editor allows the use of different font types, sizes, colors etc. Due to security requirement this window can only be open for 20 minutes. A countdown clock is included to help reviewers to post their comments before the time expires. Once

reviewers are satisfied with their comments they should click “Post” to have their comments available to other reviewers or click “Cancel” if they need to exit the screen without posting the comment.

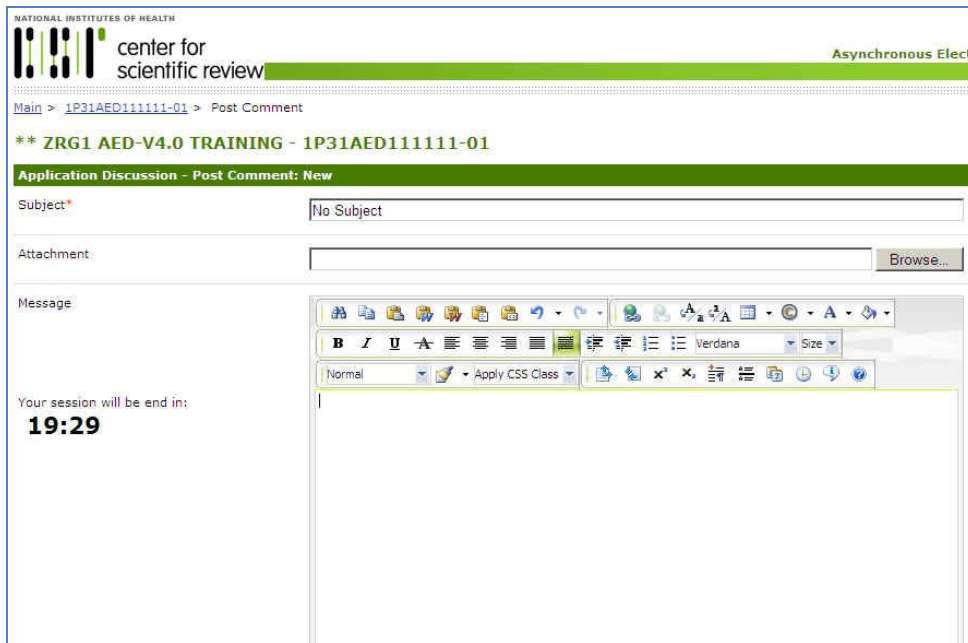


Figure 5: AED Text Editor

Figure 6 shows an application panel containing posted comments. Note that for one of the comments there is no subject. If you were the reviewer and want to add the subject line, you should click on “Edit”, type in the subject of the thread you posted and make any correction you might find needed in the comment. Reviewers can also reply to a comment made by another reviewer hitting the “Reply” link next to a comment. This will open the AED text editor to allow reviewers to include their reply comment.

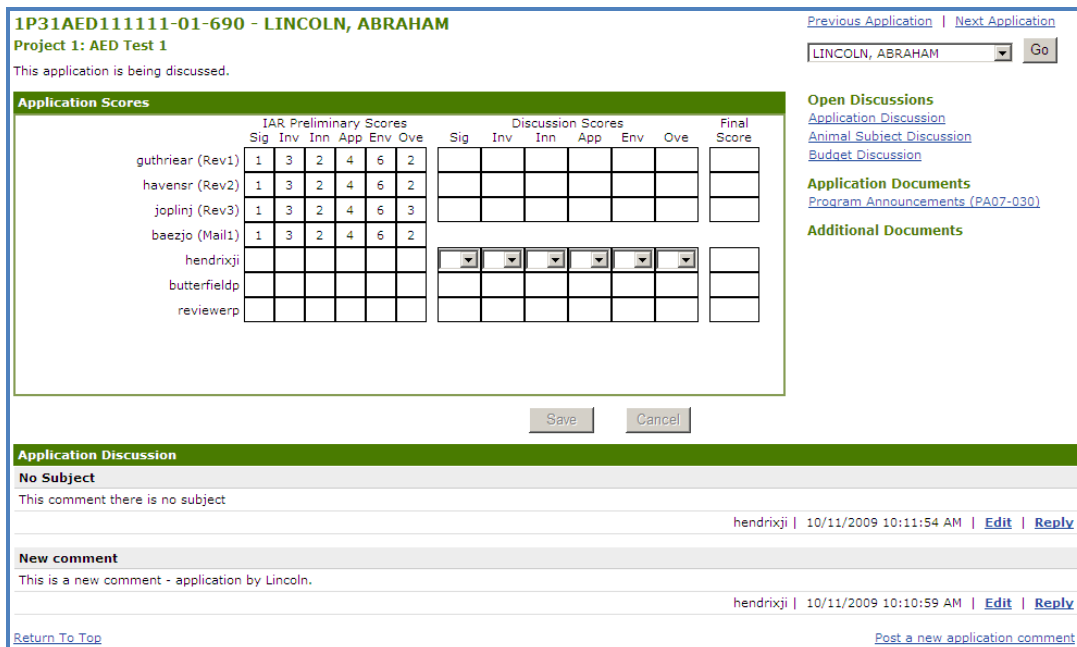


Figure 6: Application Home showing discussion comments posted by reviewers.

Posting Criteria Scores and Final Scores: Reviewers are able to post discussion scores for the review criteria as the meeting progresses. Assigned reviewers can update their criteria scores when necessary. The final score column will be available only during the final score phase. During the final score phase reviewer are able to submit final scores based on the discussions posted in the site (Figure 7). To post criteria scores or final scores click on the final score column and choose your score from the dropdown menu. Then, click “Save” to save your score. You should add your final score for all discussed applications, including those you were not assigned to review. A link to help you navigate to the applications is included in the top right of the screen. Note that for applications designated as “Not Discussed”, ND will be added as the final score.

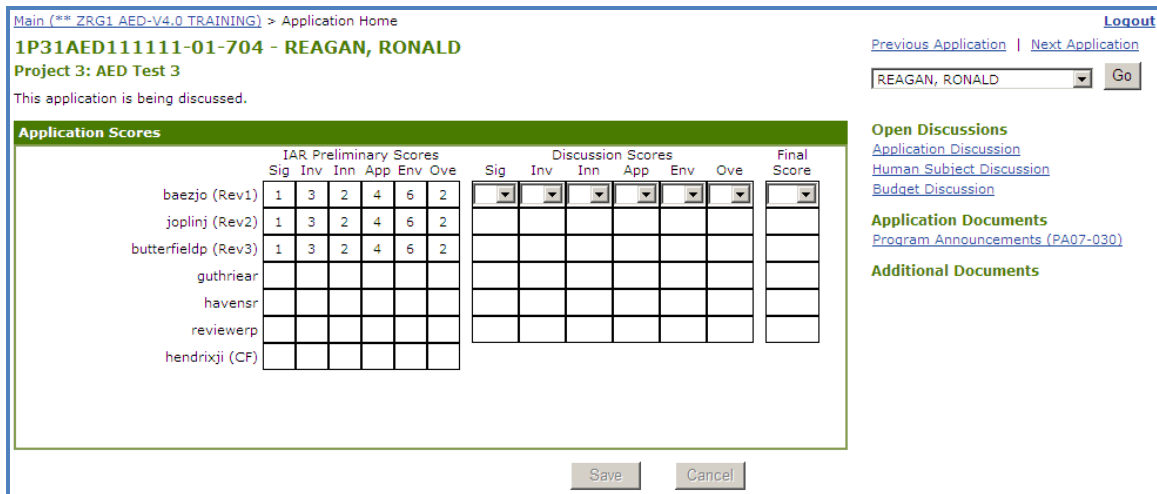


Figure 7: Application home during final scoring phase. Note the dropdown available for the final score column.

Navigating to other application: To navigate to another application reviewers can click the “Previous” or “Next Application” links at the top right of the screen. Reviewers can also highlight the PI name of the application using the dropdown list available at the top right of the screen and then hit “Go”.

Sending message to the SRO: When reviewers need to send a message to the SRO without using email they can click on the link “Send Note to SRO” on the main AED screen. When reviewers click on the link, a screen will open allowing a message to be entered in the note area. Messages written in this screen can be sent to the SRO by clicking the “Send” button.

Reading notes sent by SROs: SROs can send notes to the entire panel or to individual reviewers. A link to these notes is displayed at the top left of the AED main screen, below the Welcome containing the reviewer user name. To read these notes, click on the link. Note that the main screen in Figure 8 lists a new message. Reviewers can read the messages by clicking on the link.

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Welcome, baezjo
Messages: [New Message... please click!](#) [Logout](#)
[Send Note to SRO](#)

**** ZRG1 AED-V4.0 TRAINING**

Announcements

WELCOME to AED Training Meeting
vajjah | 8/28/2009 5:54:02 PM
This site is intended to use for training purposes only.

Phase: Discussing
Ends: 9/19/09 17:52

Additional
[Deadlines](#)
[Links](#)

[View All Apps](#)

Application Number	PI Name	Unread	Total	Status	Role	Prelim. Rank
1P31AED111111-01-695	HOOVER, HERBERT	0	0		Reviewer 1	
1P31AED111111-01-705	JEFFERSON, THOMAS	0	0		Reviewer 1	
1P31AED111111-01-704	REAGAN, RONALD	0	0		Mail 1	
1P31AED111111-01	WASHINGTON, GEORGE	0	1		-	

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Figure 8 – Main AED Screen (note that in this screen there is a link to messages from the SRO at the top)

IMPORTANT CONSIDERATIONS:

- Because the discussions are asynchronous, spreading out your participation over the duration of the meeting ensures that discussions proceed to their natural conclusion. Please plan on logging in 5-6 times per day and to commit sufficient time to make a meaningful contribution. Spending 4-6 hours per day may be necessary.
- You are being asked to score every application and contribute to the best of your ability to all discussions in the meeting, not simply those applications specifically assigned to you. Passive listening is not possible in AED, so reading the discussion threads for each application is important prior to final scoring. You should enter a final overall score for every application, but only submit final criterion scores for the applications that you are assigned to.
- The assigned reviewers should initiate the discussion for an application and provide sufficient introductory comments to bring all panel members up to speed on an application quickly.
- The Chair has responsibility for stimulating discussions and ensuring that the discussion threads are summarized adequately before final scoring.
- Access to the AED meeting can be complicated by browser compatibility issues and security restrictions that might be in place between your institution and the NIH AED servers. While all of the major browsers are supported, older versions may not work properly. The AED Team strongly recommends: Internet Explorer 6+, Firefox 1.5+ (all platforms), Netscape 8.1+ (Windows), Netscape 7.2+ (Unix/Linux), Mozilla 1.7+, or Safari 2.0+
- For help with any technical issues, including logon and website problems please email the CSR AED Support team directly at csraedsupport@csr.nih.gov.