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IAM Stands for Internet Assisted Meeting, which is a peer review meeting format using a secure website for discussions of grant applications. It differs from a face to face meeting in following ways:

• There are no oral communications at an IAM, and the discussion is conducted purely by written messaging.

• The discussion takes place simultaneously on multiple applications (either in a small group, or the entire panel).

• Reviewers may not need to be present at the meeting for the entire meeting period, or at the same time.

• An IAM involves three scores: Preliminary score, Discussion score, and Final score

• An IAM is conducted by phases including the pre-meeting phase, Introduction phase, Discussion phase and Final scoring phase.
How To Access An IAM

• About 10 days before the meeting, you will receive an email from the SRO containing the IAM URL and log-in credentials
• You should test the link and your log-on username/password before the meeting.
• Log in: The username is the same as your eCommons username, but the password is specifically created for the IAM (upper image on the right).
• If the meeting is not started, you will see a message “Meeting is not started, Please try it later” (middle image on the right)
• Before you can enter the meeting site, you will need to accept the Disclaimer (lower image on the right).
• You can use the following web browsers to access an IAM: Internet Explorer 9+, Google Chrome 36+, Firefox 28+ (all platforms), or Safari 8+
• If you have problems getting into or using IAM at any time, email the CSR IAM Support team at csriamsupport@csr.nih.gov
At Meeting Home Page you can performing the following tasks:

1. Read meeting announcements (upper left)
2. See meeting phase and timelines (upper right)
3. Access the ‘Usage Report’ page and your scoring page (See Slide 18)
4. See application list and discussion clusters (lower half)
5. Access the Application Discussion Page of each application (click on the application number or PI name)
6. See the numbers indicating new comments you have not read (lower half, the 3rd column)
7. See the total number of comments posted for each application (lower half, the 4th column)
8. Rescue not-discussed (ND) application for the discussion (see Slide 9)
9. Access IAM instructions (bottom left)
10. Access the meeting roster (bottom right)
11. Email the meeting SRO or the IAM support (bottom right)
Click the application number or the PI name on Meeting Home Page to open the Application Discussion Page where you can performed the following tasks:

1. See the application information (upper left: application number, PI name, and title).
2. See Application Score/Discussion box (upper left) containing the list of the participants, their roles, and their online availability (green dots left to their names indicate that they are available).
3. Disable Auto Refreshing of the web page (button on the upper right).
4. Navigate among applications using navigation links and dropdown box (upper right).
5. Go to discussion thread sections using discussion hyperlinks (upper right).
6. Access the application file and preliminary critiques from assigned reviewers using hyperlinks (upper right).
7. Enter discussion and final scores at respective meeting phases using the scoring boxes at the middle left of the page (See Slide 12 & 17).
8. Enter and read discussion comments in the discussion thread boxes (lower half) (See slide 7).
9. See the new comment/announcement alert (lower right), which can be disabled by pressing the ‘Disable New Comments/Announcement Alert’ button (middle right).
10. Sort the discussion comments by pressing the tab ‘View by Post Time’ or ‘View by Subject’ (See slide 15).
• Discussion comments are located in discussion thread sections at the lower half of the Application Discussion Page.

• To post a new comment, click on ‘Add Comment’. When the text editing box is open, enter the subject title in the subject box, and enter the comment in the text box (see images on the right).

• To respond to other reviewers’ comments, click ‘Reply’. In this case, no need to enter the subject title.

• When you are satisfied with your comment, press ‘Save’ at the bottom of the text box to post.

• Comments on additional criteria (human subjects, vertebrate animals, biohazards, budget, etc.) are posted at respective thread sections.

• **Note 1:** If you copy your comment from a word file, use the second paste icon on the upper side of the text editing box (Paste Plain Text). This will clean the format background of the word file and avoid text errors.

• **Note 2:** You will not be able to edit or delete your posted comments. If you need help with correcting errors in your comment, contact the SRO.

• **Note 3:** If some content in your comments is not in line with the NIH review policy, e.g. discussing funding, asking preliminary data for an R21 or R03 applications, commenting on non-review criterion items such as the PI’s independency, etc., the SRO will intervene by posting a comment to point out the inappropriateness of your comment. The SRO might also edit the content of your comment.
A typical IAM contains:

• A Pre-Meeting Posting Phase
• An Introduction Phase (optional)
• A Discussion Phase
• A Final Scoring Phase
• Meeting on Hold (optional)

Your meeting SRO will provide specific procedural information about the meeting you participate.
1. Pre-Meeting Posting Phase (New in IAM 5.1)

- Occurs before the meeting, during which the assigned reviewers are asked to post their initial comments for the applications they have reviewed.

- The initial comments are to set the stage and start the panel discussion when the meeting begins. So you are strongly encouraged to complete posting initial comments during the pre-meeting posting phase.

- Only the assigned reviewers can post during this phase.

- A reviewer can only see his/her own posted comments.

- The initial comments should contain a brief introduction of the application’s goal and the main approach, followed by the reviewer’s evaluation of the overall impact and significance of the project, as well as the main score-driving strengths and weaknesses.

- Comments on additional review criteria (human subjects, vertebrate animals, biohazards, budget, authentication of key biological resources...) can also be posted in separate discussion thread sections during this time.

- See Slide 6 for how to post a comment

- Editing and deleting the posted comments are not possible. You can contact the SRO if you need help with correcting errors in your comments.
2. Introduction Phase: Rescuing ND Applications

- An introduction phase is set to allow reviewers to bring a non-discussed application(s) up for the discussion.

- To discuss an ND application, click on the ‘Discuss’ button next to the ND application and click ‘OK’ on the next small window (see images on the right).

- After the Introduction phase, any intent to discuss an ND application will need to be communicated with the SRO, who may manually move the ND application to the discussion pool.

- For an IAM that discusses all applications on the panel, the introduction phase is not needed.
3. Discussion Phase

- The Discussion phase follows the introduction phase (with ND applications), or starts immediately when meeting starts (without ND applications).

- The Discussion is guided by the meeting chair, or the applications chair(s) when the chair is in conflict or is an assigned reviewer.

- **Discussion style**: Applications can be discussed asynchronously such that all applications in the panel are discussed simultaneously, or semi-synchronously in which applications are discussed sequentially in small clusters.

- **Reviewers’ presence at the meeting**: The reviewers’ engagement is key to a successful IAM. Therefore, reviewers are expected to devote sufficient time to be present at the meeting site to generate quality discussions. Depending on the meeting, the SRO will provide specific instructions for the expectation for reviewers to be present at the meeting. In general, for an asynchronous discussion, reviewers may not need to be present at the meeting site at the same time, and may log onto the meeting periodically to participate in the discussion. For a semi-synchronous discussion, all reviewers are usually required to be present at the meeting during the discussion of the applications.

- **Discussion focus**: Same as at all other forms of review meetings, the discussion at an IAM should focus on the overall impact, significance and the score driving factors. New elements of review criteria in the Rigor and Transparency policy should also be included in the discussion.

- **Discussion score**: The reviewers will be asked to provide a discussion score for each application during the discussion phase (see slide 12 for details).

- **Discussion Summary**: At the end of the discussion, panel discussions will be summarized by the chair(s) or designated reviewers before the meeting moves to the Final Scoring Phase (see slide 16 for details).

- **All additional criteria** including ‘Human Subjects’, ‘Vertebrate Animals’, ‘Biohazards’, ‘Budget’, etc. should be addressed in the respective discussion thread sections before the final scoring phase. Issues with the budget must not affect the score.
During the discussion phase, the discussion score is an important tool to

- engage reviewers,
- inform the reviewer’s current enthusiasm for the application being discussed,
- set the final voting range by the assigned reviewers prior to the final scoring phase.
- show the intent to vote outside the range by the unassigned panel members.

It is important for all reviewers to enter the discussion score.

The assigned reviewers should enter the discussion score as soon as the discussion phase starts (it can be the same as the preliminary overall impact score), and other panel members should enter it as soon as they gain a sense of the application and its review.

Use the either box in the middle of the page (arrows) to enter your discussion score.

You can change the discussion score as many time as you wish during the discussion to reflect the change of your enthusiasm.
New Comment Alerts

- At the bottom right side of the Application discussion page, a small box displays alerts for new comments or announcements posted in the past 10 minutes. Position the mouse over the box to stop the text from floating and read the alerts.

- If you wish to turn off the alert box, click on the ‘Disable new comment alert’ button on the upper right side of the page (red arrow).

- All posted comments will be marked ‘New’ on the left side of each comment, and can be checked off by clicking the ‘Read’ box on the right side of the comment (blue arrow).
How to Avoid Format Errors When Posting A Discussion Comment

- If you copy your comments from a word file, click on the ‘Paste Plain Text’ icon (the 2nd paste icon on the tool bar of the text editing box (arrow) to paste. This will clean the formatting background and avoid the text from becoming unreadable symbols.

- You can also use other tools to adjust the size, color, and other features of the text.
The posted comments can be displayed chronologically (default) with the newest comments on the top of the discussion thread, or sorted by subjects by pressing the right side tab on the top of the discussion threads.

**Note 1:** To avoid disruption in sorting and reading comments, the Auto-refreshing of the web page will need to be disabled. Press the ‘Disable Auto Refreshing’ button on the upper right side of the application discussion page (see the lower image on the right). After finishing reading the comments press ‘Enable Auto Refreshing’ or move to a different application page.

**Note 2:** For sorting by Subject to be accurate, you are reminded to use ‘Add Comment’ when raising a new topic/issue, and provide an appropriate subject title. If you use ‘Reply’ to discuss a different issue, the discussion comments will be mixed within comments of other topics.
The Discussion Summary

- The panel discussion will need to be summarized to inform the final scoring.
- Depending on the SRO’s instructions, the summary can be provided by the meeting chair, co-chairs, or the designated reviewers.
- Usually the summary is done about 1 – 2 hours before the final scoring phase but it may take longer for large meetings.
- The summary must objectively reflect the panel’s discussion, but not just the chair, co-chair, or the designated reviewer’s opinion.
- After the summary is posted in the application discussion thread section, other reviewers will vet it and post additional comments when needed.
4. Final Scoring Phase

- The column for final scores is activated only when the Final Voting Phase starts.
- You must enter a final score for every application that has been discussed at the meeting except for those for which you have a conflict of interest.
- For clustered applications, once you finish entering final scores for one Cluster of applications, return to the meeting home page screen to go to the next Cluster.
- Use the discussion comments and summary of each application to guide your final score.

To enter a final score:
- Go to the application discussion page for the application you want to score.
- Use the score boxes to enter your final score
- Your entered score will be saved automatically.
The Usage Report

• Click on the ‘Usage Report’ link on the meeting home page (see arrow in upper image on the right).

• This will open the Usage report page where you will see meeting participants’ activities (middle image on the right). A green dot appears next to the participant’s name indicating she/he is available at the meeting site. If a participant leaves the meeting site or idles for 20 minutes or longer, the green dot will turn gray.

The Current Scoring Sheet

• Click on the ‘Current Scoring’ link on the upper right side of the Usage Report page (middle image on the right) to open the ‘Current scoring’ sheet, on which you can see the Discussion (D) and Final (F) scores you have entered for all applications.

• This is a convenient way for you to track your scoring during both discussion and final voting phases. You will not be able to see other reviewers’ scores on this page.
The SRO will place a meeting “on hold” when he/she is away from their desk for an extended period of time or at the end of the day for a multi-day meeting.

A message will be displayed on the meeting home page indicating the meeting is on hold.

While a meeting is “on hold,” you can still read all of the discussion threads.

You can post comments while the meeting is “on hold”. However, the posted comment will not be seen by other reviewers until the SRO releases the ‘hold’ mode.
Tips For A Quality IAM

• **Initial comments before the meeting**: The assigned reviewers’ initial comments posted before the meeting play a critical role in the discussion. Your fellow panel members and the program officers from the funding institutes who observe the meeting might not have read the applications assigned to you. Therefore, it is important that you provide succinct but sufficient information about the goals of the research project and main approach described in the application, as well as the key factors that drive your score.

• **Reading other reviewers critiques in IAR**: All panel members are strongly encouraged to read the critiques provided by other reviewers for both assigned and unassigned applications. The goal is for you to be prepared to ask questions and making comments about the review of individual applications. This will not only help produce quality discussions but also make the meeting more efficient and productive.

• **Your engagement in the meeting**: The reviewers’ engagement in the discussion is the key for a productive and quality IAM. Therefore, it is critical for you to plan and commit sufficient time to be present at the meeting and participate in the discussion. During the discussion phase, you should view the application discussion page frequently for those applications assigned to you and address other panel members’ questions and comments promptly.