INTERNET ASSISTED MEETING (IAM) USER MANUAL FOR NIH GRANT APPLICATION REVIEWERS
TIP: Click each topic in the Table of Contents (TOC) to go to the specific instruction section. In the text, press Alt+left arrow (Command+left arrow for Mac) to return to TOC or from bookmarked section to the original spot.

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I. INTRODUCTION
Welcome to the Internet Assisted Meeting (IAM) 5.1 software. IAM 5.1 preserves the features of the previous versions of IAM and adds improvements, such as a pre-meeting posting phase, the ability to view your fellow reviewers' availability at the meeting website, more convenient ways of posting and sorting discussion comments, etc. This reviewer user's manual is intended to provide you with an overview of IAM and help you navigate the main functionalities needed to participate in an IAM. Each section is hyperlinked with the heading in the Table of Contents and, when appropriate, screen shots are included.

II. GETTING STARTED
What is IAM?
- IAM is a peer review meeting format, which uses an internet-based forum for discussions of grant applications.
- An IAM comprises the following phases:
  - **Pre-Meeting Posting Phase**: A period of time before the meeting for assigned reviewers to post initial comments on applications. These comments set the stage for the panel discussion.
  - **Introduction Phase**: A brief initial phase that starts when the meeting begins and ends when the discussions start. It is used only when there are not-discussed (ND) applications. During this phase, reviewers may recommend discussion of those applications that fall into the ND category based on the preliminary scores. Please see further details in The Introduction Phase: Bring an ND application back for discussion from the 'not discussed' pool
  - **Discussion Phase**: During this phase, you will participate in the discussion of ALL applications to be discussed at the meeting (unless you are in conflict), and assign a Discussion Score to each of these applications. The Discussion Phase forms the main portion of an IAM. Please see further details in The Discussion Phase: Discussing the applications and Scoring an application during the Discussion
  - **Final Voting Phase**: This phase follows the Discussion Phase. During this phase, you will assign a final overall impact score to each application based on the discussion. Once this phase begins, you will not be able to post any comments but can still read all posted comments. Please see further details in the Final Scoring Phase: Voting the Final Score
  - **Hold Phase**: The SRO may place the meeting on Hold for reasons such as at the end of the workday for a multi-day meeting, or the SRO being temporarily unavailable. Please see details in The Hold Phase: Using IAM when the meeting is On Hold.
- IAM discussions can be asynchronous or synchronous:
  - Asynchronous discussions are normally used for small meetings during which all applications are simultaneously open for discussion. Because the discussion of all applications lasts throughout the entire Discussion Phase, reviewers have greater flexibility to log on and off the meeting site during the discussions.
  - Synchronous discussions can be used for both small and larger meetings at which applications are grouped for a sequential discussion. During these meetings, all reviewers are typically required to be present at the meeting site within a specific timeframe (usually 4 to 6 hours depending on the size of the meeting) to participate in the discussions. Discussions in this method tend to be closer to real-time thus can be more active.
- IAM is closed to the general public. All discussions and materials from the IAM site must be kept strictly confidential, as with any peer review meetings.
IAM differs from Commons IAR (Internet Assisted Review):

- **Commons IAR**: IAR is an eRA Commons website, from which you access grant applications and post critiques and scores before and after the meeting.

- **IAM**: IAM is a review meeting website at which discussions of grant applications take place; it is not linked to eRA Commons. Each IAM site is independently created and is available only during the meeting dates.

What is different about IAM and other forms of review?

- **Meeting format**: IAMs are entirely online. Unlike other forms of meetings, there is no oral communication at an IAM. Discussions are carried out via threaded written comments.

- **Discussion style**: Depending on the size of the meeting, all applications, or subgroups thereof, are discussed simultaneously. On some occasions, the discussions are conducted asynchronously. That is, reviewers can read other reviewers’ comments and post their own comments at any time during the Discussion Phase. On other occasions, such as for a large meeting, applications are grouped for discussion sequentially. In the latter case, reviewers are required to remain online at the meeting site during the discussion of each subgroup.

- **Time spent online**: The time you need to spend at the meeting site depends on the size of the meeting and how the discussions are organized (grouped/synchronous vs. ungrouped/asynchronous). In general, you have the flexibility to leave the meeting for short periods of time throughout the day. However, you should commit sufficient time to contribute to the discussions in meaningful ways. In most cases, spending 4 to 6 hours per day may be necessary. The SRO will send specific instructions for each meeting.

- **Scoring at an IAM**: Three scores are involved in an IAM: 1) the Preliminary Overall Impact Scores from the assigned reviewers that are imported from Commons; 2) the Discussion Scores assigned by each reviewer during the Discussion Phase; and 3) the Final Score assigned by each reviewer during the Final Voting Phase following the discussions.

How do I get to IAM?

- About 10 days before the meeting, you will receive an email from the SRO with:
  - A link to the IAM site
  - The log-on credentials you need to access the site. These include your eCommons user name and a password created specifically for the IAM site.
  - The hyperlink to the IAM user manual.

- Please test the link and your log-on username/password before the meeting. You will see a message indicating the meeting has not started (see Fig. 1).
• When the Pre-Meeting Posting Phase begins, you will use this link and user name/password to log on to the IAM site.

**What browsers can I use for IAM?**
The IAM team strongly recommends that you use one of these browsers: Internet Explorer 9+, Google Chrome 36+, Firefox 28+ (all platforms), Google Chrome 36+, 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

The rest of this Guide will help you sign in and use the IAM website.

### III. GETTING INTO THE IAM SITE

**Login:** To sign in, click the link (or open a browser and copy and paste the link) provided by the SRO.
When the login page opens, type in your user name (this is your eRA Commons user name) and the IAM password provided by the SRO. Click the “Log in” button (See Fig. 2). The IAM Disclaimer Notice appears.
Accepting the Disclaimer: Before you can participate in the meeting, you must read and accept the points on this screen:

- That you will keep the information confidential
- That you will not save, print, or disseminate information from this meeting

To proceed you must click the “I ACCEPT” button (See Fig 3).

IV. USING THE IAM MEETING HOME PAGE
When you log on at the beginning of the meeting, you will enter the meeting home page and will see a pop-up alerting you to read announcements from the SRO and the Chairperson. Click the “Continue” button to proceed (See Fig. 4).
Looking from top to bottom, left to right, on the meeting home page you see (Fig. 5):

**Fig. 5. Meeting home page**

### Header left
- Your name
- The name of the meeting

### Header right
- Logout link
- An ‘Info for Visually Impaired’ link
- “Report” button: click to see meeting attendees’ participation status
- “Hide Top Section” button: click to hide the upper part of the screen (meeting announcements and meeting timeline)
- “Show Top Section” button: after you click the ‘Hide Top Section’ button, this button will change to “Show Top Section.” Click it to view meeting announcements and timeline

### Upper left
- Announcements from the SRO and the Chairperson. You will get a pop up on the meeting home page every time the SRO or the Chair posts a new announcement.
Upper right
- The phase and timeline of the meeting and discussion groups (if any)
- Deadlines (click to see the timeline for the entire meeting)
- View All Apps/View discussed Apps button:
  - “View All Apps” button: Click this to view all applications in the meeting. On a new screen, this button will change to “View Discussed Apps.”
  - “View Discussed Apps” button: Click this button to hide ND applications and display only those applications that are being discussed at the meeting.

Lower section
The lower section of the page shows a table of the applications in the meeting. If applications are grouped for discussion, you will see tabs on top right hand side of the table as ‘All’ containing the entire list of applications, and ‘A’, ‘B’, ‘C’, etc., for each subgroup of applications. If you point at each tab with the cursor, you will see the label of the group. Clicking a tab will take you to the screen displaying applications under that tab (group). The table shows, in separate columns, the following information:
- Application number
- Contact Principal Investigator’s name
- Number of discussion comments you have not yet read
- Total number of discussion comments for each application
- Status: A status of “CF” indicates you are in conflict with the application. A status of “ND” means the application is designated as being not discussed.
- Button to Discuss: You can choose to bring up one or more ND applications for discussion by clicking the ‘Discuss’ button next to the ND application. See Bringing an “ND” application back from the “not discussed” pool. You can take this action only during the Introduction phase of the meeting.
- Role: your role as a reviewer for the application (Reviewer 1, 2, or 3, or in conflict). Unassigned reviewers will have no role designation but are expected to monitor and participate in the discussion and assign a Discussion Score.
- Prelim. Rank: The rank order of applications in each group based on the average Preliminary Overall Impact scores for the applications imported from Commons. Because the rank is calculated separately in each group, the rank order for an application in a cluster is not necessarily the same as that of the same application when viewed from ‘All.’

Bottom left: Links to IAM user guides
Bottom right: Links to Meeting roster and send emails to the meeting SRO and IAM support

V. PRE-MEETING POSTING OF INITIAL COMMENTS BY ASSIGNED REVIEWERS:

To initiate the discussion when the meeting begins, reviewers are requested to post initial comments on their assigned applications before the meeting. The SRO will inform reviewers of when this phase starts. During the Pre-Meeting Posting Phase:
- Only assigned reviewers can post initial comments on the application’s discussion page.
- The initial comments should contain a brief introduction of the goal of the application and the main approach, the reviewer’s evaluation of the overall impact and significance of the project, and the main score-driving strengths and weaknesses.
- Initial comments can be posted by all three reviewers, or Reviewer 1 may provide a summary of the three reviewers’ critiques.
• Comments on additional review criteria (human subjects, vertebrate animals, biohazards, budget, authentication of key chemical/biological resources....) may also be posted in separate thread areas during this time.
• Each reviewer can only see his/her own posted comments.
• It is not possible to edit or delete the posted comments; reviewers can contact the SRO if help is needed to correct mistakes.

To post initial comments:
1. Click on the application number or the PI name on the Meeting Home Page to open the Application Discussion page for this application (See Getting to the application page for details).
2. Click on ‘Add Comment’ (red arrows on the right side in Fig. 6A) in the ‘Application Discussion’ thread areas to open a text-posting box (Fig. 6B).
3. Enter a subject title in the Subject box, and enter the initial comments in the text box (Fig. 6B).
4. NOTE: If you copy comments from a word document, use the second paste icon (Paste Plain Text) to paste your copied text (Fig 6B). This will properly format the text and avoid unreadable error symbols.
5. Click on ‘Save’ to post your comments.
6. Repeat the same steps to enter comments on additional criteria (human subjects, vertebrate animals, biohazards, budget, etc.) using the respective thread boxes.

Fig. 6A Posting initial comments
VI. INTRODUCTION PHASE: BRINGING AN “ND” APPLICATION BACK FOR DISCUSSION FROM THE “NOT DISCUSSED” POOL

For some review meetings, applications with average overall preliminary scores in the worse 50% are set to be “not discussed.” These applications are labeled as “ND” at the IAM site. If you think an application should be discussed, you may bring it back for discussion by following the steps below (also see Fig. 7A & B):

1. On the Meeting Home Page, click on the ‘Discuss’ button next to the application’s ‘ND’ label. A dialog box appears asking if you are sure you want to discuss the application.

2. Click ‘OK’ if you want to discuss the application; click ‘Cancel’ if you do not want to discuss the application.

Note: Bringing ND applications back for discussion can only be done in the Introduction phase.
VII. DISCUSSION PHASE

- Discussion of the applications takes place during the Discussion Phase using the Application Discussion page (see below) for each application.
- Initial comments provided by the assigned reviewers during the Pre-Meeting Posting Phase set the stage for the panel discussion. Everyone on the panel is encouraged to participate in the discussions of ALL applications on which they are not in conflict.
- Discussions can be conducted in one group or multiple subgroups termed Meeting Clusters.
- The Chair has the responsibility for stimulating discussions and ensuring that the discussion comments are summarized adequately before final scoring.

Getting to the application page: On the Meeting Home Page, for the application you want to access, click on the application number or the PI’s name. The page for that application appears (see Fig. 8).
Looking from top to bottom, left to right, on the application screen, you see:

**Top left**
- The application number and Contact PI’s name
- The application title
- The message “This application is being discussed.”

**Top right**
- Log off link
- The ‘**Disable Auto Refreshing**’ Button – Click to prevent the page from refreshing, which will sort sorting comments by subject, while you are reading posted comments.
- The ‘**Hide Top Section**’ button – Click to hide the top half of the screen.
- Links to navigate through the list of applications.
- A drop-down box to move directly to a different application by choosing the PI’s name.

**Middle left**
- Reviewer names and roles (your name is shown in red). If there is a long list of reviewers, use the scroll bar on the right hand side of the box to see all reviewers.
- A green dot to the left of a reviewer’s name indicates that this reviewer is logged on to the meeting site (although not necessarily on the current application page). When a reviewer leaves or idles at the meeting site for 20 minutes or longer, the dot will be gray.
Application Scores (Also see Scoring at IAM) – The application screen shows a table of application scores including:
- The preliminary scores that were posted on the eRA Commons website by each assigned reviewer before the meeting
- The Discussion Score column, in which to enter a Discussion Score during the Discussion Phase
- The Final Score column, in which to enter a Final Score during the Final Voting Phase
- The box for entering the Discussion or Final Score

Middle right

- Open (Go to) discussions: Click each link to go to the thread area of Application Discussion, Human Subject Discussion, Animal Subject Discussion, Biohazards Discussion, Budget Discussion, or other discussion.
- Application documents: Click the corresponding link to view the PDF of the application, critiques from each assigned reviewer, etc.

Bottom

- Discussion sections (Thread areas)

Discussion of an application

- In the Application Discussion thread area you can
  - Start a new thread
  - Read what other reviewers have written
  - Reply to other reviewers’ comments
  - Read or turn off the ‘New Comment/Announcements’ alert
  - Sort the discussion comments by subject or by posting time
- To start a new discussion, or reply to comments posted by other reviewers:
  1. Find the correct discussion section for your comments.
     - Application Discussion for your comments on the proposed project
     - Human Subject Discussion or Vertebrate Animal Discussion for your comments related to the use of human or vertebrate animal subjects (These sections will appear only for applications on which they are relevant).
     - Biohazards Discussion for comments related to issues about handling biohazards
     - Budget/Other Discussion for comments related to the proposed budget and other non-scored items
   Also see specific instructions in Commenting about human/animal subjects, biohazards, and budget/other
  2. Click “Add New Application Comment” to start a new discussion thread. NOTE: You must enter a subject title to be able to post a new comment. See Posting Initial Comments for details
  3. Click “Reply” to respond to other reviewers’ comments.
  4. When the IAM text editor opens in a new window, type a subject title (important), and enter your comment.
  5. NOTE: If you copy the comments from a word document, use the second paste icon (Paste Plain Text) to paste your copied text (Click here to see Fig 6B). This will properly format the text and avoid unreadable error symbols.
6. When you are satisfied with your comment, click ‘Save’ to post (See Fig. 6B).

**Sorting the posted comments:** There are two ways the posted discussion comments can be sorted.

1. **Chronological display** – By default, comments are displayed according to the time they were posted, with the newest on the top of the comment thread.

2. **On Subject display** – By clicking the ‘View by Subject’ tab at the top of the comment box (Fig. 8), comments will be grouped by subject titles with all messages ‘replying’ to the same subject title displayed in order.

3. **NOTE:** To sort comments correctly with the relevant subject, it is important for reviewers to use the ‘post new comment’ option (not simply ‘reply’) and enter an appropriate subject title if a new topic is initiated or a new concern is raised that was not included in the current thread.

4. **NOTE:** If you are sorting comments by Subject, press the ‘Disable Auto Refreshing’ on the upper right corner of the application page to avoid returning to the default (chronological) order when the computer autorefreshes. (Fig. 9)

**New Comments:** Newly posted comments are marked ‘New,’ which can be unmarked by checking the ‘Read’ box (Fig. 10, blue arrows).

A box on the lower right side corner will display alerts for comments and announcements posted in the past 10 minutes. The text scrolls; position your mouse over the text to stop it. Click on the ‘Disable New Comments/Announcements Alert’ button to close the alert box (Fig. 10, red arrows).
Discussion Score

- During the discussion, reviewers are requested to enter a Discussion Score that indicates their current level of enthusiasm for each application. You may post or change a Discussion Score at any point during the Discussion Phase. You do not have to post a comment when you post or change a Discussion Score.

- To post or change a Discussion Score:
  1. Go to the Application Page.
  2. At the bottom of the score box, enter your Discussion Score by either typing in an integer or selecting a score using the ‘Select Your Score’ drop-down box (See Fig. 9).
  3. Your entered/selected score is automatically saved.
NOTE: We use Discussion Scores from the assigned reviewers to determine the voting range. Therefore, you must post a discussion score for each application on which you are an assigned reviewer, even if it is the same as your preliminary score. If you are not an assigned reviewer, your Discussion Score is also important because it indicates whether you are scoring within or outside the voting range. Scoring outside the range needs to be transparent to the panel.

Commenting about human/vertebrate animal subjects, biohazards, and budget/other

- **Human subjects**: In the Human Subject Discussion thread, list any concerns regarding the use of human subjects and inclusion of women, minorities, and children.

- **Vertebrate Animals**: In the Vertebrate Animal Discussion thread, list any concerns regarding the use of vertebrate animals.

- **Biohazards**: In the Biohazards Discussion thread, list any concerns about handling of biohazards involved in the application.

- **Budget**: In the Budget Discussion thread, list any concerns about the proposed budget.

If you think the application adequately addresses the issues in these areas, please post a comment of “Acceptable” for each section. That way the SRO will know that you have evaluated these aspects.

Clustered Discussions

- Applications in large meetings may be discussed in Clusters.

- Reviewers can access applications within each Cluster by clicking a Meeting Cluster tab (A, B, C ...) on the top of the Application Panel on the Meeting Home Page.

- Assigned reviewers may post initial comments in all Clusters during the Pre-Meeting Posting Phase or the Introduction Phase.

- Discussions start with Cluster A, at which time discussing applications in other Clusters is disabled. When the time allotted for Cluster A applications has expired, Cluster B discussions begin, and so forth until applications in all Clusters have been discussed. Reviewers are encouraged to focus only on the active Cluster to ensure thorough and effective reviews.
VIII. THE 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 except those for which you have a conflict of interest.
- You can navigate through the applications using the ‘Next’ or ‘Previous’ links or the drop-down box in the upper right of the Application Screen.
- For clustered meetings, once you finish entering Final Scores for one Cluster of applications, return to the Meeting Home Page to navigate to the next Cluster.
- You will not be able to enter a final score for applications that were not discussed. They will be automatically labeled as ND.
- Usually, a summary of discussion for each application was provided by the Chair or a designated reviewer. To assign an informed final score, please take time to read the discussion comments and summaries for all of the applications before you submit final scores.

To enter a final score:
1. Go to the Application Page
2. At the bottom of the score box, enter a Final Score by either typing the integer into the left-hand box or selecting a score using the ‘Select Your Score:’ drop-down box (See Fig. 12).
3. Your entered score will be saved automatically.

Fig. 12. Entering Final Score

Voting outside the range: If you plan on voting outside of the range, contact the SRO first to discuss the policy (this policy varies depending on the Institute reviewing the application). If you will be submitting a vote outside of the range you need to make your out-of-range score transparent to the panel by: 1) making a comment in the discussion thread prior to ‘Final Voting’, and 2) indicating so with your Discussion score.
NOTE: Once Final Voting is initiated, you will no longer be able to post any additional comments in the discussion thread areas. Therefore, please make sure to post all comments before the Final Voting Phase begins.

VIII THE HOLD PHASE: USING IAM WHEN THE MEETING IS “ON HOLD”

- The SRO can place a meeting “on hold” when they are away from their desk or at the end of the day for a multi-day meeting (See Fig. 13). While a meeting is on hold, you can still read all of the discussion threads.

![Fig. 13. Meeting on hold](image1)

- You can post comments while the meeting is on hold. However, other reviewers will not see your newly posted comments until the SRO takes the meeting off hold. You will see a message indicating that your comment has been saved but won’t seen until the hold mode is removed (see Fig. 14).

![Fig. 14. Posting comments during meeting-on-hold](image2)
IX. CONTACT IAM SUPPORT AND/OR SRO DURING THE MEETING

You may contact the CSR IAM support or the SRO via emails from the meeting site should you need technical or other assistance. The email links to CSR IAM support and the SRO are located at the bottom left corner of each IAM page.

Center for Scientific Review
National Institutes of Health
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