

## IAR Meeting Phases: A Description

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The process of reviewing applications is broken down into several meeting phases. The Scientific Review Officer (SRO) creates phase dates in the IAR Control Center for each meeting. Before reviewers can see a meeting in IAR, the phases for the meeting must be set, and the reviewer must have an active account and be enabled for that meeting.

### Submit Phase

- The Submit phase usually ends a few days before the actual meeting.
- Reviewers submit critiques and preliminary scores for their assigned applications.
- Reviewers can only view critiques and scores that they have submitted.
- Reviewers may submit critiques for unassigned applications if permitted by the SRO (Control Center meeting wide option).
- The *List of Applications* will default to show a reviewer's assignment list (*List Assigned Applications*), but reviewers can see the full meeting list of applications by clicking on the *List All Applications* link.
- Reviewers who are in conflict with an application may not be able to view the grant application.
- The Critique Due Date (or Submit phase end date) determines the end of the Submit phase.

### Read Phase

- The Read phase begins immediately at the end of the Submit phase and ends when the SRO designates the Edit phase, usually a few days before the meeting is held. The end date is set in the IAR Control Center.
- If a reviewer has not submitted an assigned critique, the SRO may block the reviewer from reading other critiques on that application until they submit. When blocked, the reviewer will see an alert on the *List of Applications* which indicates that he/she must submit before reading. As soon as the reviewer submits the late critique, the other critiques will be available.
- Reviewers are permitted to read all critiques and see all preliminary scores (unless blocked or in conflict).
- Reviewers cannot view critiques or scores on applications with which they are in conflict.
- Reviewers cannot modify or resubmit critiques or preliminary scores. The only exception is for a blocked reviewer submitting a late critique. They can update criterion scores.
- Reviewers may view the Score Matrix which indicates streamlined or lower-half applications as designated by the SRO. Reviewers can speak with their SRO if they wish to discuss an application designated as a lower-half application.
- The *List of Applications* will default to show a reviewer's assignment list (*List My Assignments Only*), but reviewers can see the full meeting list of applications by clicking on the *List All Applications* link.
- Reviewers have several options for viewing critiques:
  - One at a time through the View action link for each application;
  - *View My Critiques* link that creates a PDF file of all critiques submitted by the reviewer;
  - *View All Critiques for Assigned Applications* link that creates a PDF file of all critiques for the reviewer's assigned applications; and
  - View All Meeting Critiques sorted by Application or sorted by PI name.

### Edit Phase

- This phase is optional at the SRO's discretion and is usually open for a few days to a week after

the actual meeting.

- Reviewers may submit updated critiques for their assigned applications and read critiques posted by themselves and others.
- Reviewers can submit critiques for unassigned applications if permitted by the SRO (Control Center meeting wide option).
- Reviewers cannot view critiques or scores on applications with which they are in conflict.
- Reviewers can update their criterion scores.

**Note on Final Scoring:** During the Submit and Edit phases, reviewers can update their criterion scores. When the final scoring phase is open, reviewers can enter final scores. The final scoring can be set at any time that the reviewer has access to the meeting.

Since an Edit phase is optional, if there is no Edit phase during a meeting, the final scoring has to end when the Read phase ends.

### Recruitment Phase

- This phase is optional at the SRO's discretion and usually ends with the start of the meeting.
- SRO initiates this phase in IAR Control Center and manages aspects of this phase via an additional Recruitment Control Center interface in Peer Review.
- Potential Reviewers self-identify Conflicts of Interest (COI) before they are given access to applications in a meeting.
- Potential Reviewers can inform the SRO of a desire to discuss details of COI.
- When SRO acknowledges valid COIs, the system automatically creates user-defined conflicts in the Peer Review module.
- At SRO's discretion, applications' abstracts can be displayed to potential reviewers during the Recruitment Phase.

### Virtual Meeting Phases

In addition to the standard, SUBMIT, READ, and EDIT phases for all meetings, there are two additional phases (*Introduction and Discussion*) and one sub-phase (*Cluster Discussion*) that have been introduced for Virtual Meetings.

- **Introduction Phase** - This required phase occurs after the 'read' phase and before the 'discussion' phase.
  - During this phase, reviewers can 'rescue' applications to be discussed that the SRO/ESA originally designated as 'lower half.'
  - If the Meeting Chair has a conflict with any application in the meeting, the SRO/ESA can designate an 'Application Chair' for the discussion of that application.
- **DISCUSSION Phase** - This is a required phase, and must occur after the introduction phase
  - Reviewers are granted access to participate in a sequential or asynchronous discussion of applications on individual application discussion boards.
  - **Cluster Discussion Phase** - When a review meeting has applications that have been grouped by cluster, the SRO has the ability to set discreet discussion phases specifically for each cluster. Unless specifically noted in the 'Cluster Discussion Dates' portion of the Meeting Information header, cluster discussion dates will default to the length of the entire discussion phase. If the SRO has not entered an Edit phase, the reviewers view of the meeting and discussion boards will end.
- **Changes to the Edit Phase for Virtual Meetings** – If the SRO has entered an Edit phase end date, reviewers will be able to see discussion boards and comments for applications. If a reviewer is in conflict with the application, the discussion board will not appear. This view of the discussion board does not allow reviewers to post new comments or reply to existing comments. This use of the Edit phase for a virtual meeting could be used with the final scoring duration to create a way for reviewers to consider all comments posted in a discussion (including the chair's summary of

discussion) and indicate a final score. Normal actions such as uploading a correct critique template and correcting criterion scores are still possible during the Edit phase.

**Additional Note**

**Meeting Chairperson:** The Chair of a meeting is not granted any special privileges in IAR regarding access to critiques and is treated as a regular reviewer. During Submit Phase, like other reviewers, the Chair will only be able to view critiques for his/her assigned applications. During the Read Phase, like other reviewers, the Chair will be able to read all meeting critiques (unless blocked or in conflict). The *List of Applications* will default to show a reviewer's assignment list (List My Assignments Only), but the reviewers can see the full meeting list of applications by clicking on the *List All Applications* link. If a Chair has no assignments, he/she will need to click on *List All Applications* link to view all meeting critiques.

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