

Administer and Manage a Review

User Guide | 2007

NSPIRES | **INTERNAL**

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NASA RESEARCH AND
EDUCATIONAL SUPPORT SERVICES

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Table of Contents

Introduction	5
The Review Process.....	5
Accessing a Solicitation’s Reviews	7
Solicitation Review Tab	8
Adding an Evaluation Form	9
Evaluation Forms	9
Overall Grade Scoring Methods	12
Adding an Overall Grade Scoring Method.....	12
Viewing/Editing an Overall Grade Scoring Method.....	13
Solicitation Review Listing	14
Adding a Review.....	14
Review Module	16
Review Information	17
Review Support.....	18
Support Roles and Options.....	18
Adding Support Personnel	19
Individual Review Settings.....	20
Evaluation Sharing	20
Editing Individual Review Settings	21
Panel Review Settings.....	21
Editing Panel Review Settings	22
Associated Response Structure(s)	22
Adding an Associated Response Structure	23
Deleting an Associated Response Structure.....	23
Reviewers	24
Roles of the Reviewer.....	25
Review Role	25
Reviewer Role (Proposal Assignment Role)	25
Review Assignment Agreement	25
NDA Status.....	26
Adding Reviewer	26
Viewing Reviewer Details	27
Reviewer Information	27
Reviewer Options	27
Proposals Assigned.....	28
Edit Reviewer Options	28
Edit Reviewer Proposal Assignment	29
Remove Reviewer Proposal Assignment	29
Remove Reviewer.....	30
Notify Reviewers.....	30
Proposals	31
Adding Proposals to a Review	32
Generate Review Copies.....	33
Viewing Proposal Details	34

Table of Contents (cont.)

Review Copies.....	34
Compiled Evaluations	35
Assigning Reviewers to a Proposal	36
Reviewer Role (Proposal Assignment Role)	36
Edit Reviewer Proposal Assignment.....	36
Remove Proposal Reviewer Assignment	37
Panels	38
Adding a Panel to a Review	39
Panel Information	40
Panel Information.....	41
Panel Support Personnel	42
Support Roles and Options.....	42
Adding Support Personnel	43
External Panel Controls	44
Panel Publication Release.....	44
Delete Panel	44
Panel Proposals	45
Adding Proposals to Panel	46
Removing Proposal from Panel	47
Viewing Panel Proposal Details	47
Review Copies.....	48
Compiled Evaluations	49
Conflicts of Interest.....	49
Attendees	50
Panel Roles.....	51
Adding Attendees to a Panel	51
Remove Attendee from Panel.....	52
Viewing Attendee Details.....	53
Conflicts of Interest.....	54
Individual Evaluations	55
Viewing an Individual Evaluation	56
Editing an Individual Evaluation	57
Creating an Individual Evaluation	57
Downloading an Individual Evaluation.....	57
Uploading an Individual Evaluation	58
Deleting an Individual Evaluation	59
Printing an Individual Evaluation	59
Panel Evaluations.....	60
Viewing a Panel Evaluation.....	61
Editing a Panel Evaluation	62
Creating a Panel Evaluation.....	62
Downloading a Panel Evaluation.....	62
Uploading a Panel Evaluation.....	63
Deleting a Panel Evaluation.....	64
Printing a Panel Evaluation	64

Introduction

NASA maintains a complex set of standards for evaluating the numerous proposals it receives in response to a solicitation announcement. NSPIRES supports this complex process with the Review feature. This feature allows you to set up a review so that external members may evaluate these proposals and then gather all the information received so that the selection process may begin.

In this guide, you will learn how to set up a review to include:

- Adding a review to a solicitation
- Creating, editing, and selecting evaluation forms
- Creating, editing, and selecting scoring methods
- Selecting support staff
- Assigning of proposals to a review
- Adding reviewers to a review
- Assigning proposals to reviewers
- Generating proposal review copies
- Assigning a panel to a review
- Viewing and compiling proposal evaluations

The Review Process

Members of the scientific community respond to NASA solicitations for research by submitting proposals through their affiliated organizations. When NASA receives a given set of proposals, NASA begins evaluating each proposal based on the criteria prescribed in the solicitation. The goal of these evaluations is to recommend which of these proposals NASA should select for funding.

The process that manages proposals from their receipt to their recommendation for selection is called a Review. Reviews are initiated by the NASA Program Officer in charge of the program that is soliciting. Reviews are organized and supported by NRESS personnel with **Administer Review** permission.

A Review will consist of a group of proposals linked to a associated solicitations, with the addition of support staff, reviewers, individual evaluations, and one or more panels.

Typically, you will set up a Review to evaluate proposals within only one solicitation. You may, however, set up a Review to evaluate proposals in more than one solicitation. In this instance, the first solicitation will be the *Primary Solicitation*, and all other solicitations will be *Associated Solicitations*.

One of the most important parts of setting up a Review is designation of the Review Start Date and Review End Date. These dates, which you may change at any time, will govern all external activity for a Review as well as all internal dates associated with the Review.

Your next step in the Review process will be to assign submitted proposals from a solicitation to the Review. A Review evaluates proposals, which you may add or delete at any time within the Review timeframe. NSPIRES also gives you the option of setting up a Review even before there are any submitted proposals tied to a solicitation.

When using the Review feature, you will add internal members as support staff in a variety of roles as well as external NSPIRES members as Reviewers, Review Chair, Review Co-Chair. You may add or remove individuals from a Review at any time.

When setting up a Review, NSPIRES gives you the option of selecting an electronic form to record results of these individual evaluations. NSPIRES will provide the function to compile all individual evaluations, which will become a good reference for panel discussion and panel evaluations.

The final evaluation and recommendation for selection of proposals in a given review is often done in a Panel. Panels are groups of people made up of reviewers—generally peers in the scientific community—and review support personnel. Panel activities are overseen by the NASA Program Officer. Rarely, proposals are evaluated without Panels.

NRESS personnel who support reviews with panels will need to perform the following:

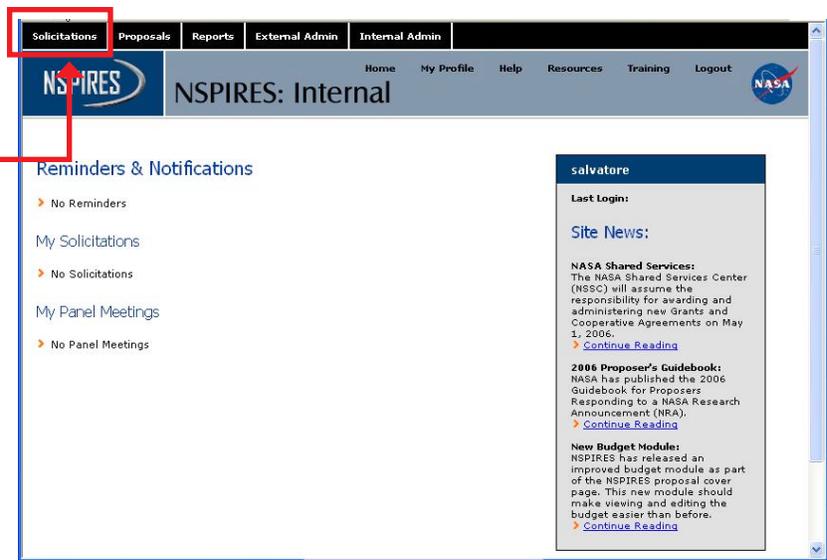
- Add a Panel to a review
- Edit Panel Information
- Manage Panel support personnel
- Manage Panel proposals
- Manage Panel Attendees
- Publish the Panel
- Compile Individual Evaluations
- Create Panel Evaluations

Lastly, NSPIRES will provide on-line interface at the panel meeting for better grading, voting and reporting of the evaluation process.

Accessing a Solicitation's Reviews

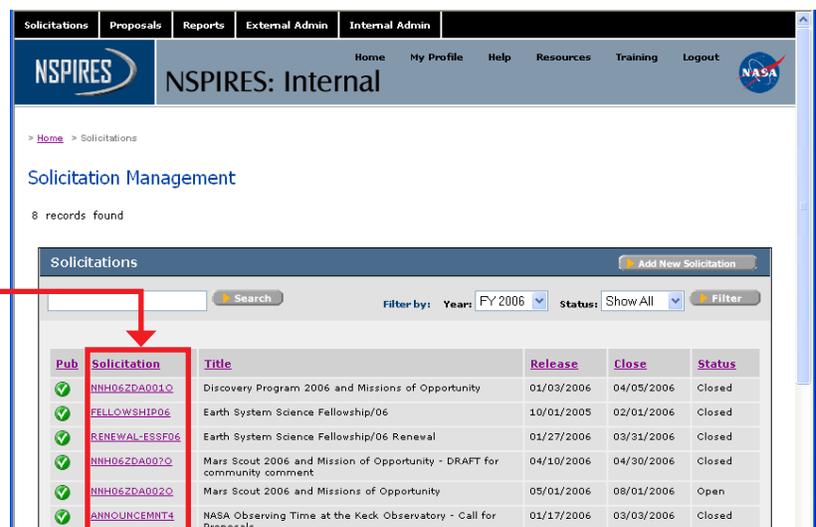
As an Internal NSPIRES user, you may access the Review section for any solicitation you are associated with. The Review section will display a list of all reviews the solicitation is associated with along with any evaluation forms and scoring methods for that solicitation's review process.

1. Login to Internal NSPIRES
2. Select the **Solicitations** menu from the Site Navigatin bar.



From the SOLICITATION MANAGEMENT page, select the specific solicitation or program element for which you wish to access the review.

3. Select the appropriate link from the SOLICITATION column



This will bring you to the VIEW SOLICITATION page. Scroll to the bottom of the page to access the Review feature.

View Solicitation

4. Click the **Review** button

Publication Approval: ✔

Solicitation Information Edit

Title: Discovery Program 2006 and Missions of Opportunity
Number: NNH06ZDA0010

Dates

Preview: -- **Release:** 01/03/2006 **Close:** 04/05/2006 **Select:** --

Other Dates (optional) Add

Description	Date

Response Structures: Add

Pub	Type	Acro	Label	Open Date	Due Date	Link
✔	NOI	DISC06	DISC06 NOIs Due	01/03/2006	03/06/2006	--
✔	PROP	DISC06	DISC06 Proposals Due	01/03/2006	04/05/2006	DISC06 NOI

Home Review Withdraw Review Publish

Solicitation Review Tab

You are now at the SOLICITATION REVIEW tab. This page will display all Reviews associated with this solicitation along with the solicitation's Evaluation Forms and the Overall Grade Scoring Methods to be used for the reviews. The Evaluation Forms and Overall Grade Scoring Methods will be the templates used to create the Individual Evaluation Forms and Panel Evaluation Forms used during the review. Depending on your user privileges, you may also be able to add a Review, Evaluation Form or Scoring Method to this solicitation.

To view a Review, Evaluation Form or Scoring Method, click the link in the Name column of the respective section.

Solicitation Review Tab

Evaluation Forms created for this solicitation

Overall Grade Scoring Methods created for this solicitation

Reviews associated with this solicitation

Info **Program Officers** **Documents** **Amendments** **Structures** **Proposals** **Reviews**

Evaluation Forms Add

Form Name	Form Description
DISC06-IND Preview / PDF	Individual evaluation form for DISC06
DISC06-PAN Preview / PDF	Panel evaluation form for DISC06

Overall Grade Scoring Methods Add

Method Name	Type	Description
DISC06 ratings	Adjectival	10 Items (Excellent ... Not Recommended)

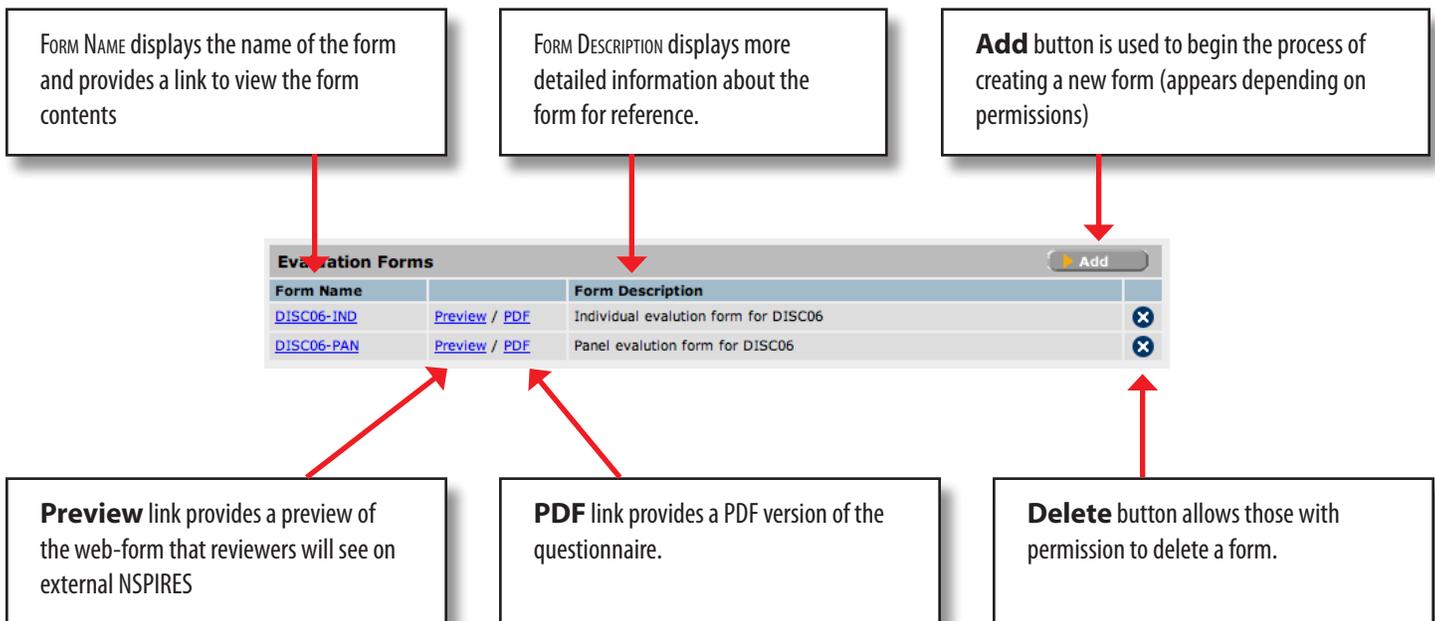
Reviews Add

Acronym	Review Name	Review Start	Review End	Review Chair
DISCPOROV	Discovery Program Review	06/01/2006	08/15/2006	(none)

Evaluation Forms

Evaluation forms are the criteria used to evaluate a proposal, i.e., the questionnaire used by reviewers. All Evaluation Forms will be displayed in the EVALUATION FORMS section of the SOLICITATION REVIEW tab. If this is the first time you are creating a form for this solicitation, this section will be blank.

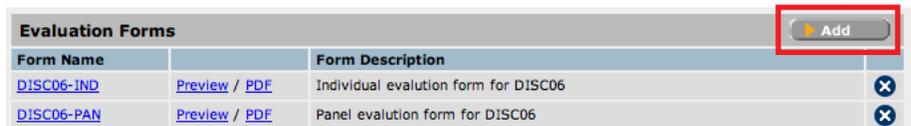
In order for individual reviewers and/or panel members to rate the strengths and weaknesses of a particular proposal, you must generate the criteria in a form to record their results. Typically, you will have one form for individual evaluations and one form for panel evaluations within each review. NSPIRES allows you to either create your own form from a template, or edit an existing form, if available. After they are created, forms are assigned as part of the review options later within the Review module.



Adding an Evaluation Form

To begin the process of creating an evaluation form, click the **Add** button on the EVALUATION FORMS section title bar.

1. Click the **Add** button



Next, NSPIRES will display the following screen so you can select whether you are creating a new form, copying an existing form into this review or using a form template.

2. Make selection and click **Continue**

Note
Only creating a new form is available at this time.

Next, enter a Form Name and a description for the form. The name should be less than 20 characters and will be used by the system to create the assignments within the review. Use the description field to provide more information about each form if necessary.

- 3. Enter a FORM NAME (required)
- 4. Enter a DESCRIPTION (optional)
- 5. Click the **Continue** button

You now at the VIEW EVALUATION FORM page. Since this is a new form, you will need to edit the form to add pages and questions to the form. If you selected the **Form Name** link to view/edit an existing form, you may follow these steps, as well.

6. Click the **Edit** button

At the top of the form, the option to Add a New Page appears.

7. Click the **Add New Page** button to create a page

Once a page exists, you can add a question by clicking the **Add New Question** button. See *Evaluation Form Questionnaire—Add Question* for more information.

8. Click the **Add New Question** button to create a question

Evaluation Form Questionnaire—Add Question

On the EVALUATION FORM QUESTIONNAIRE - ADD QUESTION page you may create a question for the evaluation form. You must repeat this process for each question you wish to add. NSPIRES allows you to select from a number of answer formats, such as text input, checkbox, radio button, and also to determine if the question is required or optional.

- Enter QUESTION TEXT (required)
- Enter question INSTRUCTIONS (optional)
- Select an ANSWER FORMAT (required)
- Select a radio button if the question is Required or Optional (required)
- Depending on answer format, enter additional fields.
- Click **OK** to add question for questionnaire page.

You will continue to build the questionnaire in this manner until complete, as shown. If editing an existing form, you may revise any portion of the form here, as well. Once you publish the review, external reviewers will use this form to enter their evaluations.

- Edit the form as necessary
- Click the **Preview** button to view the form as the external user will see it
- Click the **Save** button to save the questionnaire

Note

NSPIRES will not allow you to edit a form once you assign it to a review.

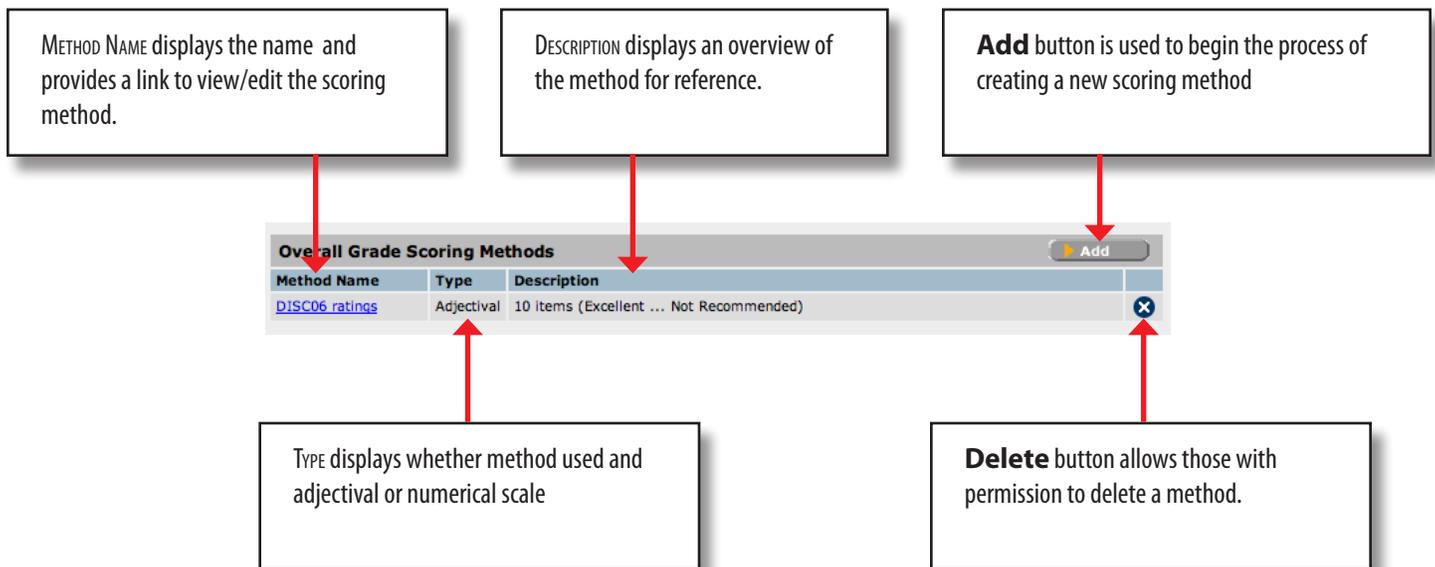
icon key

- Edit
- Move down
- Delete
- Move up

Previewing an Evaluation Form

Overall Grade Scoring Methods

The OVERALL GRADE SCORING METHODS define the scale used for grading proposals in both individual evaluations and panel evaluations. The scoring method can use either adjectival grades (e.g., Excellent, Very Good, Good, etc.) or a number scale (e.g., 1–10 or 1–100). There also may be different methods used for individual and panel evaluations or for different reviews as well as a single method used for all evaluations.



Adding an Overall Grade Scoring Method

To create a new scoring method to be used for the review, click the **Add** button on the OVERALL GRADE SCORING METHODS title bar.

Only users with the Administer Review permission will have the ability to add scoring methods to a review.

Adding a Scoring Method

1. Click the **Add** button

To create a new scoring method, you must name the method and select the type.

The METHOD NAME is used by the system to identify the scoring method in lists and when assigning methods to Individual Reviews and Panel Reviews.

There are two scoring types: ADJECTIVAL and NUMERICAL. Adjectival grades can be defined by the user and are also assigned a point value that are used for statistical calculations by the system. The user can change, add to or delete from the default grades provided as desired. The order in which the grades appear in the edit screen will be the order in which they will appear in the external user's selection menus.

Numerical grades are assigned a high and low value and then the number format is selected: integers only, a single decimal point (e.g., 4.5), or two decimal places (e.g., 9.25). NSPIRES will validate the reviewers scores against on the limits defined here.

Adding a Scoring Method (continued)

Adjectival Grades

Enter a name

Select Adjectival

Enter a Label and Score for each adjectival grade. Use the Delete button to remove a row.

Use the **Add button to add a row.**

Click **Save when finished**

Numerical Grades

Enter a name

Select Numerical

Enter a High and Low Grade and select the Decimal places

Click **Save when finished**

Viewing/Editing an Overall Grade Scoring Method

To view details on a scoring method, click the name link in the OVERALL GRADE SCORING METHODS section of the SOLICITATION REVIEW tab. NSPIRES will provide the complete scoring method settings and a preview of what external NSPIRES users see.

If you have editing privileges, an **Edit** button will appear. Clicking the **Edit** button will bring up the screens shown in the *Adding a Scoring Method* figure shown above for editing.

Overall Grade Scoring Method Information Edit

Method Name: SEEDS ratings

Method Type: Adjectival

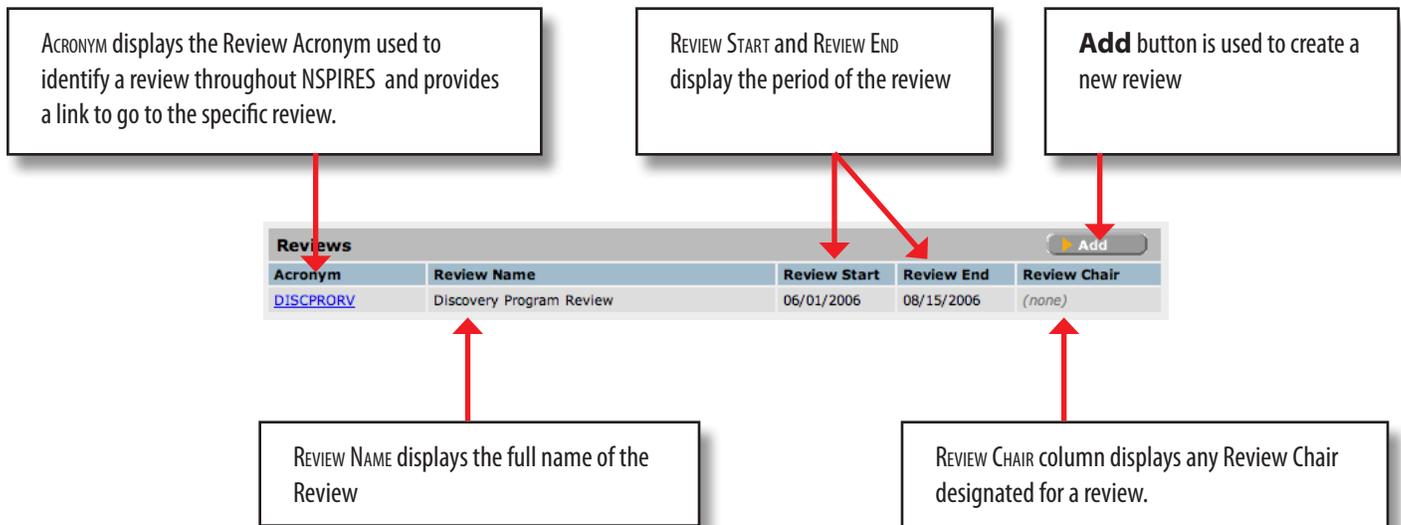
Label (50 characters max)	Score
Excellent	5.0
Excellent/Very Good	4.5
Very Good	4.0
Very Good/Good	3.5
Good	3.0
Good/Fair	2.5
Fair	2.0
Fair/Poor	1.5
Poor	1.0
NRFC	0.0

External Site Preview

Overall Grade: Select Score

Solicitation Review Listing

All reviews associated with a solicitation are listed in the Reviews section of the Solicitation Review tab. Click the link in the Acronym column to enter the review module.

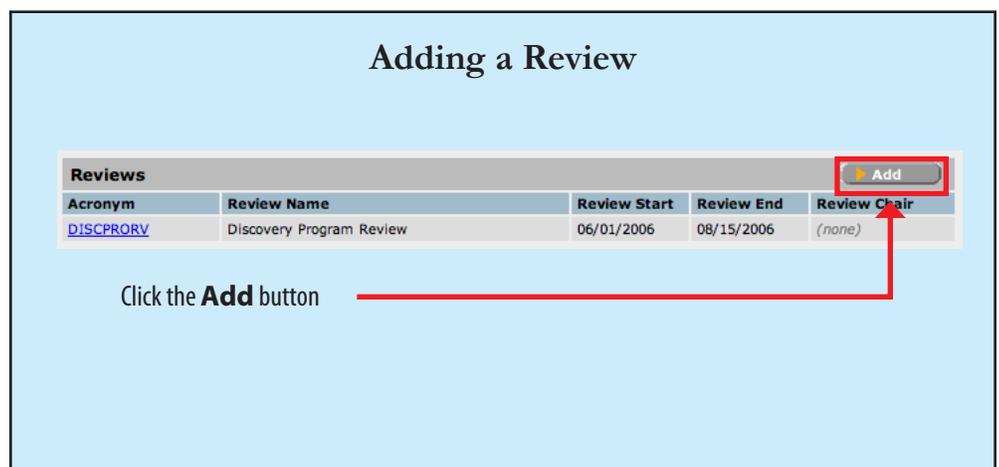


Adding a Review

NSPIRES allows you to add one or more reviews to a solicitation. A review may contain the proposals of one or more response structures, including response structures from other solicitations. Only users with the Administer Review permission will have the ability to add a new review.

If you wish to participate in an already existing review, please see the Associated Response Structures section under Review Information.

To create a new review, click the **Add** button on the REVIEWS title bar and follow the system prompts.



The first step is to select which Response Structure's proposals will be included in the review. In most cases, a solicitation will have only a single proposal response structure and NSPIRES will select it by default and the user must simply confirm this. If there is more than one available response structure, the user must select which response structures to include and also select one as Primary. The Primary response structure cannot be removed from a review and in the case of a review with multiple programs, it is typically the program responsible for the review process.

The second step is to enter the detailed information on the review. Please be aware that the review process will be bounded by two dates—the REVIEW START DATE and the REVIEW END DATE. These dates will govern the external activity for review as external NSPIRES will only make the review available to an external user during this period. Also, any evaluation due dates and panel dates must fall within these dates. The PROPOSAL REVIEW COPY type must also be selected. This selection will govern whether reviewers will see a Full or Redacted copy of the proposals (see note in figure).

The final step of adding a review is to confirm the data entered and to save the review. This will create an empty review (no proposals or reviewers assigned) and take the user to the review module's REVIEW INFORMATION page.

Adding a Review (continued)

Step 1:

If there is a single response structure:

Select Response Structures for Review					
	Acronym	Label	Open	Due	Link
<input checked="" type="checkbox"/>	DISC06	DISC06 Proposals Due	01/03/2006	04/05/2006	

1. Click the **Continue** button

If there are multiple response structures:

Select Response Structures for Review						
Select	Primary	Acronym	Label	Open	Due	Link
<input checked="" type="checkbox"/>	<input type="radio"/>	OCEAN11	OCEAN11 Proposals Due	02/01/2005	11/15/2005	--
<input checked="" type="checkbox"/>	<input type="radio"/>	OCEAN12	OCEAN12 Proposals Due	06/01/2005	11/01/2005	--
<input type="checkbox"/>	<input type="radio"/>	SEEBEEGB	SEEBEEGB Proposals Due	04/01/2005	12/01/2005	--

- 1a. Select the Response Structures to include
- 1b. Designate one Response Structure as Primary
- 1c. Click **Continue**

Step 2:

Enter Review Information			
Review Name:	Discovery Program Review 2		
Review Acronym:	DISCPRORV2		
Review Start:	Jul	1	2006
Review End:	Aug	30	2006
Proposal Review Copy:	<input type="radio"/> Full <input checked="" type="radio"/> Redacted		

Full

A Full Proposal Review Copy is the complete proposal.

Redacted

A Redacted Proposal Review Copy is intentionally missing information, such as the name of the PI or the budget.

- 2a. Enter REVIEW NAME
- 2b. Enter REVIEW ACRONYM
- 2c. Enter REVIEW START and REVIEW END dates
- 2d. Select type of PROPOSAL REVIEW COPY to use
- 2e. Click **Continue**

Step 3:

Enter Review Information				
Review Name:	DISCOVERY PROGRAM REVIEW 2			
Review Acronym:	DISCPRORV2			
Review Start Date:	07/01/2006 12:01:00 AM			
Review End Date:	08/01/2006 11:59:00 PM			
Proposal Review Copy:	Redacted			
Primary	Acronym	Label	Open	Due
true	DISC06	DISC06 Proposals Due	01/03/2006 12:00:00 AM	04/05/2006 12:00:00 AM

3. Verify the information and click the **Save** button

Review Module

When you access the review module by clicking the Review Acronym link or creating a new review, the first page that will be displayed is the REVIEW INFORMATION page (INFO tab). You must access this page any time you want to view/edit review information, view/add support personnel to a review, view/edit Individual Review Settings, view/edit Panel Review settings, or view/edit associated response structures to a review. As you can see, NSPIRES also provides access to other areas specific to this review, such as the PROPOSALS, REVIEWERS, and PANELS tabs. The various sections of this page you should be familiar are shown below.

Review Module—Review Information Tab

The screenshot shows the 'Discovery Program Review [DISCRORV]' page. The page has a header with the review title and acronym, and a navigation bar with tabs for 'Info', 'Proposals', 'Reviewers', and 'Panels'. The main content area is divided into several sections: 'Review Information', 'Review Support', 'Individual Review Settings', 'Panel Review Settings', and 'Associated Response Structure(s)'. At the bottom, there are two buttons: 'Publication Release' and 'Delete Review'.

Callout Boxes:

- REVIEW NAME and [ACRONYM] are displayed here along with the primary solicitation for this review** (points to the header area).
- These tabs allow you to access other areas of the review, including PROPOSALS, REVIEWERS, and PANELS** (points to the navigation tabs).
- Icon shows the current publication status for the review** (points to a green checkmark icon in the top right).
- REVIEW INFORMATION displays general review information** (points to the 'Review Information' section).
- REVIEW SUPPORT PERSONNEL shows support personnel assigned to a review.** (points to the 'Review Support' table).
- INDIVIDUAL REVIEW SETTINGS is where you define the evaluation form, scoring method, and evaluation sharing options used for individual reviews.** (points to the 'Individual Review Settings' section).
- PANEL REVIEW SETTINGS is where you define the evaluation form and scoring method used for panel reviews.** (points to the 'Panel Review Settings' section).
- ASSOCIATED RESPONSE STRUCTURE(S) allows you to attach other response structures (i.e., proposals) to a review.** (points to the 'Associated Response Structure(s)' table).
- Publication Release button allows you to set the publication status of a review.** (points to the 'Publication Release' button).
- Delete Review button allows those with permission to delete a review.** (points to the 'Delete Review' button).

Review Information

The REVIEW INFORMATION section displays general information about the review including the REVIEW NAME and ACRONYM, the REVIEW START and REVIEW END dates, a link to the REVIEW INSTRUCTIONS (optional) and the REVIEW NOTE (optional). The REVIEW INSTRUCTIONS and REVIEW NOTE will appear on external NSPIRES for reviewers to download or read.

If you have Manage Review permissions, you can edit this section. The data entered while creating a review (Review Name, Acronym, Review Start and End dates) can be changed here along with the optional items: Review Instructions and Review Note.

The REVIEW INSTRUCTIONS contain a label, which will appear as the linked text used for downloading the instructions file on the external site, and the file itself. If no file has been attached to this review, a **Browse** button will appear to select a file to upload. If a file already exists, the filename will appear with a **Replace** button to select a new file.

The REVIEW NOTE is a text field that will be displayed on the external NSPIRES site for reviewers. Use it for a quick and easy reference for reviewers.

Editing Review Information

Discovery Program Review [DISCPRORV]
NNH06ZDA0010

Review Information

Review Name: *

Review Acronym: *

Review Start: *

Review End: *

Proposal Review Copy: * Full Redacted

Review Instructions: Label:
File:

Review Note:

(* Fields marked with an asterisk are required)

After a file is selected, the page will reflect the selection:

Label:
File: [DISCPRORV_instructions.pdf](#)

1. Enter or edit information as necessary.
2. Click **Save** when finished.

REVIEW NOTE will be displayed on external NSPIRES Review Information page:

Review: Discovery Program Review 2 [DISCPRORV2]

Associated Solicitation(s): [NNH06ZDA0010 \[DISC06\]: Discovery Program 2006 and Missions of Opportunity \[P\]](#)

Review Instructions: [DISCPRORV2 Review Instructions](#) Review Support Personnel: [Cino, Salvatore \(Program Officer\)](#) [Bush, Porter \(Peer Review Admin\)](#)

Note: If you have any questions on review instructions, please contact Alice Smith at 202-555-2222 ext 122.

Panels

Panel Name	Panel Acronym	Location	Start Date	End Date
DISC06_Panel1	DISC06-P1	Washington Marriott 2120 M Street, NW Washington, DC	08/02/2006	08/03/2006

Review Support

The REVIEW SUPPORT section lists any internal NSPIRES users assigned to a support role for the review along with their contact information and their option settings.

NAME displays the name of the person assigned and is also an email link.

PHONE and ROLE display the phone number and role for each person.

Click the **Add** button to add additional support personnel to the review

Review Support						Add	
Name	Phone	Role	📧	🔍	🔧	✕	
Cino, Salvatore	202-555-1232	Program Officer	y	y	🔧	✕	
Daniels, Katerina	202-555-4021	APRA	y	n	🔧	✕	

The 📧 column indicates the notification settings:
y – receives notifications
n – do not receive notifications

The 🔍 column indicates the external display settings:
y – display on external NSPIRES
n – do not display

Click the **Delete** button to remove a person.

Click the **Edit** button to change the option settings.

Support Roles and Options

Each person added as support personnel will have a role specified and their support options set.

The support roles are defined below, you may have more than one user assigned to any given role.

- **Program Officer (PO)**—NASA Officer
- **Peer Review Administrator (PRA)**—An internal user who administers the review.
- **Assistant Peer Review Administrator (ARPA)**—An internal user who administers the review.
- **Logistics Support**—An internal user who supports the panel in logistics
- **IT Support**—An internal user who provides IT support.

The NOTIFICATION option determines if the selected person will receive NSPIRES system generated notifications concerning the review (e.g., a reviewer declines the review assignment or declares a conflict of interest). The EXTERNAL DISPLAY option sets whether the support person's name and contact information will be shown on the external NSPIRES *Review Information Page*.

Adding Support Personnel

Click the **Add** button in the section's title bar to begin the process of adding a support personnel. Only users with Manage Review permission are able to add personnel.

To add a support person, you must first search for the user. NSPIRES will only search the internal NSPIRES database of registered users. Then select a user and assign their role and set their options.

Adding Support Personnel

Step 1:

Enter Search Criteria

First Name:

Last Name:

Username:

Email:

Search **Cancel**

NSPIRES will only search the internal NSPIRES database for registered users.

You may use one or any combination of the search criteria to locate an internal user.

1. Enter search criteria and click **Search**

Step 2:

Search Results

Name	Internal Affiliations (Agency/Center/Directorate/Division/Discipline)	Email	Phone
<input checked="" type="radio"/> Bush, Peter	NASA/Headquarters	pbush@nasaprs.com	202-555-1212
<input type="radio"/> Bush, Porter	NASA/Headquarters/Science Mission Directorate	porterb@nasaprs.com	202-555-2525
<input type="radio"/> Bushetsky, Svetlana	NASA/Headquarters/Science Mission Directorate NASA/Headquarters/Exploration Systems Mission Directorate	sveta@nasaprs.com	202-555-8782
<input type="radio"/> Bush, Zoe	NASA/Johnson Space Center/Exploration Systems Mission Directorate (Ineligible affiliation)	zbush@nasaprs.com	202-555-4220

Select **Cancel**

You may only add individuals affiliated with one of the associated solicitations in the review. Ineligible individuals will be marked as ineligible and cannot be selected.

2. Select user from list and click **Select** button

Step 3:

Select Support Personnel Options

Personnel Information

Name: Bush, Porter
NASA Center/Company: NASA Research and Education Support Services
Address: 500 E Street, SW Suite 200 Washington, DC 20024
Email: porterb@nasaprs.com
Office Phone: 202-555-2525
Internal Affiliations: NASA/Headquarters
Employee Type: Gov't Contractor

Support Personnel Options

Select Role:

Notifications: Send Email Notifications

External Display: Display on External

Save **Back** **Cancel**

Note

You can only add personnel one at a time because the options must be set individually.

- 3a. Verify correct user is selected
- 3b. Select ROLE, NOTIFICATIONS, and EXTERNAL DISPLAY
- 3c. Click **Save**

Controls if person will be listed on external NSPIRES:

Home

Account Mgmt Organization Mgmt Proposals Reviews Awards NSPIRES

> Home > Current Reviews > Review Information

Review: **Discovery Program Review 2 [DISCPORV2]**

Associated Solicitation(s): [NNH06ZDA001Q \[DISC061: Discovery Program 2006 and Missions of Opportunity \(Pr](#)

Review Instructions: [DISCPORV2 Review Instructions](#) Review Support Personnel: [Cno. Salvators \(Program Officer\)](#) [Bush, Porter \(Peer Review Admin\)](#)

Individual Review Settings

If the review is going to have an Individual Review component, you must define the settings here. For each response structure's proposals that will have an Individual Evaluation, you must select the EVALUATION FORM and OVERALL GRADE SCORING METHOD that will make up the INDIVIDUAL EVALUATION FORM filled out by the external reviewers. Additionally, the default EVALUATIONS DUE date is set here (proposals that are part of a panel can have a different evaluation due date set in the Panel section). Finally, the settings for individual EVALUATION SHARING are set here.

If a response structure does not have a form or scoring method linked to it, there will not be an individual review for that response structure's proposals.

The screenshot shows the 'Individual Review Settings' interface. It includes an 'Edit' button, 'Evaluation Form(s)', 'Overall Grade Scoring', 'Evaluations Due', and 'Evaluation Sharing' sections. Red arrows point from callout boxes to these sections.

Individual Review Settings	
Evaluation Form(s):	NNH06ZDA0010 (DISC06): DISC06-IND [PDF]
Overall Grade Scoring:	NNH06ZDA0010 (DISC06): DISC06 ratings
Evaluations Due:	08/01/2006
Evaluation Sharing:	<input checked="" type="checkbox"/> Viewable to Chair/Co-Chair (Anonymous) <input checked="" type="checkbox"/> Viewable to Primary (Anonymous) <input type="checkbox"/> Viewable to Secondary (Anonymous)

Callout boxes provide the following explanations:

- Edit button:** Click the **Edit** button to change the Individual Review Settings
- Evaluation Form(s):** EVALUATION FORM(S) will display the Evaluation Form questionnaire selected for each Associated Response Structure and links to preview the questionnaire or download a PDF of the questionnaire.
- Overall Grade Scoring:** OVERALL GRADE SCORING will display the scoring method selected for each Associated Response Structure along with a link to preview the scoring method.
- Evaluations Due:** EVALUATIONS DUE is the default due date for individual evaluations.
- Evaluation Sharing:** EVALUATION SHARING will display the roles selected for viewing submitted evaluations and the anonymity setting for each role.

Evaluation Sharing

EVALUATION SHARING will permit individual reviewers to see the reviews submitted by fellow reviewers after they have submitted their own evaluation (if applicable). The EVALUATION SHARING settings are effective prior to the PANEL START DATE (if there is no Panel, then until the REVIEW END DATE).

There are two components to evaluation sharing: the role and the anonymity. Only the roles selected will be able to view other submitted evaluations. In the event of a single reviewer having multiple roles, the REVIEWER ROLE (aka PROPOSAL ASSIGNMENT ROLE) settings will take precedence over a REVIEW ROLE. E.g., if a reviewer is both the REVIEW CHAIR and a PRIMARY REVIEWER for a particular proposal in a review, the EVALUATION SHARING settings for a primary reviewer will be followed in this case. If the same reviewer wants to view the shared evaluations of a proposal for which he is neither a primary or secondary reviewer, then the EVALUATION SHARING settings for the Chair/Co-Chair will be followed.

In addition to controlling who is able to view submitted evaluations, you can also control whether the names of the other reviewers are displayed. When set to Anonymous, NSPIRES will hide the identity of reviewers when viewing shared evaluations prior to the Panel.

Editing Individual Review Settings

To add an individual review to the review or modify any of the settings, click the **Edit** button in the INDIVIDUAL REVIEW SETTINGS title bar. Only users with Manage Review permission can edit these settings.

The primary area will be the EVALUATION FORM OPTIONS. In this section you can select which of the two evaluation form components (the Evaluation Form Questionnaire and the Overall Grade Scoring Method) will make up an INDIVIDUAL EVALUATION FORM. To have a Individual Review, you must specify an Evaluation Form questionnaire and/or Overall Grade Scoring Method for an Associated Response Structure. For each Associated Response Structure, NSPIRES will display all forms and scoring methods defined in structure's Solicitation Review tab. You can select only one of each component per structure. The links in this section will provide you with a preview of each for reference.

1. Select options as appropriate
2. Click **Save** when finished

Note

Once an evaluation for a proposal has been created, the EVALUATION FORM OPTIONS for that response structure **cannot** be changed.

Panel Review Settings

If the review is going to have a Panel Review component, you must define the settings here. For each response structure's proposals that will have a PANEL EVALUATION FORM, you must select the EVALUATION FORM and OVERALL GRADE SCORING METHOD that will make up the Panel Evaluation Form filled out by the external reviewers.

If a response structure does not have a form or scoring method linked to it, there will not be a panel review for that response structure's proposals.

Editing Panel Review Settings

To add a panel review to the review or modify any of the settings, click the **Edit** button in the PANEL REVIEW SETTINGS title bar. Only users with Manage Review permission can edit these settings.

The primary area will be the EVALUATION FORM OPTIONS. In this section you can select which of the two evaluation form components (the Evaluation Form Questionnaire and the Overall Grade Scoring Method) will make up an PANEL EVALUATION FORM. To have a Panel Review, you must specify an Evaluation Form questionnaire and/or Overall Grade Scoring Method for an Associated Response Structure. For each Associated Response Structure, NSPIRES will display all forms and scoring methods defined in structure's Solicitation Review tab. You can select only one of each component per structure. The links in this section will provide you with a preview of each for reference.

1. Select options as appropriate
2. Click **Save** when finished

Note

Once an evaluation for a proposal has been created, the EVALUATION FORM OPTIONS for that response structure **cannot** be changed.

Links will show previews of each for reference when selecting.

Associated Response Structure(s)

The ASSOCIATED RESPONSE STRUCTURE section lists all response structures and their solicitations that are linked to the review. In order for a Proposal to be in the review, its response structure must be listed here. Any response structure selected when the review was created will be shown here. You also have the ability to add additional response structures from any solicitation to this review by clicking the **Add** button or removing a structure with the **Delete** button. Only users with Manage Review permission can add or delete additional response structures.

If the solicitations associated with the review are through different NASA organizations, the review will belong, and be accessible, to one or more NASA organizations.

SOLICITATION shows the solicitation number of the response structure.

ACRONYM is the Response Structure acronym

Click the **Add** button to change the Individual Review Settings

Associated Response Structure(s)						Add
Solicitation	Title	Acronym	Release	Due		
NNH06ZDA0010	Discovery Program 2006 and Mission of Opportunity	DISC06	01/03/2006	04/05/2006	(primary)	
NNH06ZUU002N	ASA Specialized Center of Research (NSCOR) For the Estimation of Solid Tumor Cancer Risks From Space Radiation	OCEAN12	03/01/2006	05/01/2006		X

TITLE is the solicitation title

RELEASE and DUE are the release date and due date, respectively.

Click the **Delete** button to remove a response structure from the list.

Adding an Associated Response Structure

Adding other response structures to the review gives you the ability to add additional proposals to the review. To add a response structure, click the **Add** button in the ASSOCIATED RESPONSE STRUCTURE(S) section title bar. Only users with Manage Review permission can add a response structure.

The first step is to locate the solicitation or program element. Enter your search criteria in the search box provided. From the results list, select the solicitation or program element you wish to add.

After the solicitation is chosen, you must then select which response structures from the solicitation to add. Using the checkboxes, you may choose more than one if desired.

After the response structures have been chosen, the ASSOCIATED RESPONSE STRUCTURE(S) section should be updated with the new information.

Repeat the process as necessary to add response structures from other solicitations.

Adding an Associated Response Structure

Step 1:

Add Response Structure

Search Solicitations

Solicitation	Title	Release	Close	Status
<i>(Enter your search query above)</i>				

1. Enter search criteria and click **Search**

Step 2:

Solicitations Found (3)

Solicitation	Title	Release	Close	Status	
<input type="checkbox"/>	NNH06ZUU002N	ASA Specialized Center of Research (NSCOR) For the Estimation of Solid Tumor Cancer Risks From Space Radiation	02/01/2006	11/15/2006	Open
<input type="checkbox"/>	NNH06ZUU004N-ASTEP	Astrobiology Science and Technology for Space Exploration	02/01/2006	10/25/2006	Open
<input checked="" type="checkbox"/>	NNH06ZUU004N-GALEX	GALEX Space Investigator, Cycle 2	03/11/2006	05/15/2006	Closed

2. Make selection and click **Continue**

Step 3:

Select Response Structures for Review

NNH06ZUU004N-GALEX: GALEX Space Investigator, Cycle 2

Acronym	Label	Release	Due	Link	
<input type="checkbox"/>	OCEAN11	OCEAN11 Proposals Due	03/11/2006	04/30/2006	--
<input checked="" type="checkbox"/>	OCEAN12	OCEAN12 Proposals Due	03/11/2006	05/01/2006	--
<input type="checkbox"/>	SEEBEEGB	SEEBEEGB Proposals Due	04/01/2006	05/15/2006	--

3. Select response structures and click **Add**

Deleting an Associated Response Structure

Deleting an ASSOCIATED RESPONSE STRUCTURE will remove that structure's proposals from the list of potential proposals. To remove a structure, click the **Delete** button in the ASSOCIATED RESPONSE STRUCTURE section and confirm the removal. Only users with Manage Review permission can remove a response structure.

Note

You **cannot** remove an ASSOCIATED RESPONSE STRUCTURE while a proposal from it is assigned to the Review.

Associated Response Structure(s)						<input type="button" value="Add"/>
Solicitation	Title	Acronym	Release	Due		
NNH06ZDA0010	Discovery Program 2006 and Mission of Opportunity	DISC06	01/03/2006	04/05/2006	(primary)	
NNH06ZUU002N	ASA Specialized Center of Research (NSCOR) For the Estimation of Solid Tumor Cancer Risks From Space Radiation	OCEAN12	03/01/2006	05/01/2006		<input checked="" type="button" value="X"/>

Click Delete button then confirm the action.

Reviewers

The REVIEWERS tab provides an overview of all reviewers assigned to a review, collectively referred to as the reviewer pool. At a glance, you can check a reviewer's AFFILIATIONS and ASSOCIATIONS, all assigned proposals with current evaluation status and role, review assignment status, and email address. For more information, click any of the available links for a more detailed view of a specific area.

Review Module—Reviewer Tab

The screenshot shows the 'Discovery Program Review [DISCRORV]' interface. The title bar displays 'Discovery Program Review [DISCRORV] NNH06ZDA001.0'. Below the title bar are tabs for 'Info', 'Proposals', 'Reviewers', and 'Panels'. The 'Reviewers' tab is active, showing a table of 6 reviewers. The table columns are Name, Affiliations/(Associations), Email, Panels, Proposals, and Review Assignment. The 'Proposals' column contains icons representing evaluation status (Submitted, Draft, Not Created) and proposal IDs with roles (S, P, N). The 'Review Assignment' column shows the status (Accepted, Pending, No NDA) and a delete icon (X).

Callout boxes provide the following information:

- REVIEW NAME and [ACRONYM] are displayed here along with the primary solicitation for this review** (points to the title bar).
- These tabs allow you to access other areas of the review, including INFO, PROPOSALS, REVIEWERS, and PANELS** (points to the navigation tabs).
- Icon shows the current publication status for the review** (points to a green checkmark icon in the top right).
- Click Add button to add a reviewer to the review, Delete button to remove.** (points to the 'Add' and 'X' buttons in the top right of the reviewer list).
- REVIEW ASSIGNMENT shows whether or not the reviewer has accepted the assignment.** (points to the 'Accepted', 'Pending', and 'No NDA' status indicators).
- PROPOSALS lists any proposals assigned to a reviewer along with the current evaluation status and role.** (points to the 'Proposals' column).
- Number in title bar shows the number of reviewers in the reviewer pool.** (points to the '(6)' in the title bar).
- NAME shows the name of the reviewer and a link to the Reviewer Details page.** (points to the reviewer names in the 'Name' column).
- AFFILIATIONS/(ASSOCIATIONS) lists the organizations the reviewer is affiliated with (in bold) or associated with (in italics).** (points to the 'Affiliations/(Associations)' column).
- EMAIL provides a link to the reviewer's primary email address.** (points to the 'Email' column).
- Notify Reviewer allows you to notify reviewer of review assignment.** (points to the 'Notify Reviewers' button at the bottom).
- PANELS provides information on the panel you assigned the reviewer.** (points to the 'Panels' column).

Roles of the Reviewer

There are two types of roles a reviewer will have, a REVIEW ROLE and a REVIEWER ROLE.

Review Role

The REVIEW ROLE is general role assigned when a reviewer is added to the reviewer pool. The roles are shown below:

- **REVIEWER**—External member added to the review pool that can be assigned to a review a proposal and/or attend a panel.
- **REVIEW CHAIR**—External member who oversees review. Has same capabilities as a reviewer plus expanded permissions to view proposals and panels not directly assigned to. The Review Chair is shown in the reviewer pool with two bullets next to their name (e.g., [Young, Christopher](#) ••).
- **REVIEW CO-CHAIR**—External member who assists in overseeing review. Has same capabilities as a reviewer plus expanded permissions to view proposals and panels not directly assigned to. Review Co-Chairs are shown in the reviewer pool with a single bullet next to their name (e.g., [Timpaneades, Lori](#) •).

Reviewer Role (Proposal Assignment Role)

The REVIEWER ROLE (aka PROPOSAL ASSIGNMENT ROLE) designates the reviewers role for the individual review of a particular proposal they are assigned to. The reviewer will have a role for each proposal assigned.

- **PRIMARY REVIEWER**—External member assigned to evaluate a proposal and will be a Panelist in charge of consolidating evaluations for a specific proposal.
- **SECONDARY REVIEWER**—External member assigned to evaluate a proposal and will is a panelist.
- **NON-PANELIST REVIEWER**—External member assigned to only evaluate a proposal and not join in a panel.

Review Assignment Agreement

In order to participate in the NASA review process all reviewers must accept a REVIEW ASSIGNMENT AGREEMENT. For reviewers that are not U.S. civil-servants, the agreement also includes a Non-Disclosure Agreement. The REVIEW ASSIGNMENT STATUS tracks whether the reviewer has Accepted, Declined or has not responded to the assignment. NSPIRES will highlight any declined assignments in the listings as an alert to the internal user.

Review Assignment Status	Description
Pending	Default status when external member is added to a review. Reviewer has not been notified of pending review assignment and cannot access review on external NSPIRES
No NDA	Reviewer has been notified of review assignment and can access review on external NSPIRES but has not responded.
Declined NDA	Reviewer has declined review assignment/Non-Disclosure Agreement on external NSPIRES.
Accepted	Reviewer has accepted the review assignment and, if applicable, the Non-Disclosure Agreement.
Declined	Reviewer has had review assignment declined by an internal user after accepting the Non-Disclosure Agreement, if applicable.

NDA Status

The NDA STATUS indicates the current status of the Non-Disclosure Agreement that is part of the REVIEW ASSIGNMENT AGREEMENT all non-civil-servant reviewers must accept. U.S. civil servants are exempt from the non-disclosure agreement but are bound by similar terms as part their employment, so that condition is reflected here as well.

Once the review agreement is accepted, the NDA terms or civil-servant confidentiality requirements cannot be revoked and NDA STATUS will permanently be either Accepted or Exempt to indicate that the reviewer has seen and is bound by them.

NDA Status	Description
No NDA	Reviewer has not responded to the review assignment yet. Has neither accepted or declined.
Declined	Reviewer has declined review assignment/Non-Disclosure Agreement on external NSPIRES and will not participate.
Accepted	Reviewer has declared themselves a non-civil-servant and accepted the review assignment and the Non-Disclosure Agreement.
Exempt	Reviewer has declared themselves a civil-servant and accepted the review assignment.

Adding Reviewer

In order for an external user to participate in a review as either a reviewer, panelist, or both, they must be added to the reviewer pool.

To add a reviewer to the review pool, you must have Manage Review permissions. To begin the process, click the **Add** button in the REVIEWERS section title bar.

You must now perform a search for the External NSPIRES member you wish to add to the review. Select the member you wish to add to the review from the list and change the REVIEW ROLE as necessary. Then click **Add** to add the member to the review pool. Repeat as necessary to add multiple reviewers.

After the new reviewer is added, they will be displayed in the list of reviewers and be available for proposal or panel assignment.

Adding a Reviewer

Step 1:

Enter Search Criteria

First Name:

Last Name:

Username:

Email:

1. Enter search criteria and click **Search**

Step 2:

Search Results

Name	Mailing Address	Email	Status	Role
Katsaros, Melissa	3665 Robinson Road Gillette, WY 82716	MelissaKatsaros@yahoo.com	Activated	<input type="button" value="Add"/> Reviewer Reviewer Review Chair Review Co-Chair

2a. Select the appropriate radio button to choose a member
2b. Select a ROLE from the drop-down list
2c. Click the **Add** button

Viewing Reviewer Details

Clicking the Reviewer's name link will take you to the REVIEWER DETAILS page. On this page you will get overview of the reviewer including contact information, associations and affiliations, the REVIEWER ROLES, REVIEW ASSIGNMENT STATUS, NDA STATUS, detailed information about the assigned proposals and the ability to edit the reviewer's roles. The information is divided into three sections: REVIEWER INFORMATION, REVIEWER OPTIONS, and PROPOSALS.

Reviewer Detail Page

The screenshot shows the Reviewer Detail Page for Richard Jackson. The page is divided into three main sections: Reviewer Information, Reviewer Options, and Proposals. Callout boxes provide detailed instructions for each part of the interface.

Review Name and [ACRONYM] are displayed here along with the primary solicitation for this review

These tabs allow you to access other areas of the review, including PROPOSALS, REVIEWERS, and PANELS

Icon shows the current publication status for the review

Click Edit button to edit REVIEWER OPTIONS

Reviewer name

REVIEWER INFORMATION shows contact information and affiliations/associations

REVIEWER OPTIONS section shows roles and status

Click Delete icon to remove proposal assignment.

Click Edit icon to change reviewer's proposal assignment role/status

Click EVALUATION STATUS link to go to view the INDIVIDUAL EVALUATION FORM.

Click proposal NUMBER link to go to REVIEW PROPOSAL DETAIL page

PROPOSALS section shows the proposals assigned to this reviewer.

Number	Title	PI	Organization	Panel	Role	Proposal Assignment	Conflict	Evaluation
06-DISC006-0001	Atmospheric Anomalies	Donnelly, Tanya	South Virginia State College	DISC06-P1	Primary	Accepted	No	Submitted (07/19/2006)
06-DISC006-0003	Phoebus Mission	Vasila, Dom	University of Central Maryland	DISC06-P1	Secondary	Accepted	No	Draft (07/22/2006)
06-DISC006-0004	Lampades	Merle, Nimish	University of Eastern Wyoming	DISC06-P1	Primary	Accepted	No	Submitted (07/19/2006)

Reviewer Information

The information displayed in this section will be the primary mailing address, primary shipping address, primary email, and primary phone designated in the reviewer's NSPIRES account address book. Additionally, any affiliated or associated organizations will be shown to aid in assignment selection and conflict of interest determination.

Reviewer Options

This section shows the reviewer's REVIEW ROLE, REVIEW ASSIGNMENT STATUS, NDA (NON-DISCLOSURE AGREEMENT) STATUS, and an EXPLANATION (comments) entered for any declined status, if applicable. The internal user can edit the options by clicking on the **Edit** button. Only users with Manage Review permissions may edit this information.

Proposals Assigned

This section lists any proposals assigned to the reviewer for an Individual Evaluation. Each line will give a brief summary of the assignment. The internal user may edit the PROPOSAL ASSIGNMENT by clicking the **Edit** button at the right. To remove a proposal assignment, the user should click the **Delete** button.

Edit Reviewer Options (Change Review Role/Review Assignment/NDA Status)

To change the assigned REVIEW ROLE, toggle the REVIEW ASSIGNMENT, and switch the NDA STATUS, click the **Edit** button in the REVIEWER OPTIONS title bar. You must have Manage Reviews permission to edit this section.

On the edit screen that appears, you can change reviewer's REVIEW ROLE (i.e., Reviewer, Review Chair or Review Co-Chair). There can be many Reviewers and/or Review Co-Chairs in a review, but only one Review Chair. If there is already a Review Chair selected, you must change that user's role before assigning a new Review Chair.

The REVIEW ASSIGNMENT STATUS cannot be freely changed between all status options (e.g., you cannot change a reviewer's status from "No NDA" to "Accepted"). See the table below for the available options.

The NDA STATUS may only be changed after a reviewer accepts the review. And then only between "Accepted" and "Exempt" (see table below).

The EXPLANATION field is required for comments relating to a Declined or Declined NDA status of the REVIEW ASSIGNMENT. If the reviewer declines the review assignment from external NSPIRES, their reason is displayed here. If an internal user is switching a reviewer's status to declined, the reason should be entered here.

Edit Reviewer Options

Richard Jackson

Reviewer Information	Reviewer Options
Mailing Address: Eastern Shore University 123 Main Street Suite 200 Anytown, MD 10023	Role: Reviewer
Shipping Address: Eastern Shore University 123 Main Street Suite 200 Anytown, MD 10023	Review Assignment: Accepted
Email: rjackson@esu.com	NDA Status: Accepted
Phone(s): (0) 301-555-3003	Explanation:
Affiliations: Eastern Shore University	
Associations: Global Scienc & Technology, Inc.	

Save
Cancel

1. Change options as necessary
2. Click **Save** when finished

Review Assignment Status Editing Options

No NDA	→ (n/a)	You cannot change the Review Status of "No NDA" by editing. Use the Notify Reviewers action to change status to Pending.
Pending	→ (n/a)	You cannot change the Review Status of "No NDA" by editing. External user needs to take Accept/Decline action to change status.
Declined NDA	→ Pending	If external user has mistakenly declined the Review Agreement/NDA, internal user may reset the status to Pending and allow external user to take Accept/Decline action again.
Accepted	↔ Declined	Internal users may toggle Review status between Accepted and Declined after external user accepts assignment. Changing status to between accepted/declined does not effect NDA status or Proposal Assignment Status.

NDA Status Editing Options

No NDA	→ (n/a)	You cannot change the NDA Status of "No NDA" by editing. Only external user can change status via the Accept/Decline Review action.
Accepted	↔ Exempt	Internal user can toggle reviewer status to indicate employee declaration between Accepted (non civil-servant) and Exempt (civil servant).
Declined	→ (n/a)	You cannot directly change the NDA status once declined by the external user. Reset the Review Assignment from Declined NDA to Pending to change back to No NDA.

Edit Reviewer Proposal Assignment (Change Reviewer Role/Proposal Assignment Options/Conflict of Interest)

To change the REVIEWER PROPOSAL ASSIGNMENT options for a reviewer, click the **Edit** icon in the right column of the PROPOSALS section of the REVIEWER DETAIL page. You must have Manage Reviews permission to edit this section.

On the REVIEWER PROPOSAL ASSIGNMENT PAGE that appears, you can change the REVIEWER ROLE (i.e. Primary Reviewer, Secondary Reviewer or Non-panelist Reviewer) for a particular proposal assignment.

Additionally, if the reviewer is unable to complete an individual assignment, you can toggle the PROPOSAL ASSIGNMENT status to Declined. Note that if the status is declined, an EXPLANATION is required.

Finally, if a reviewer has a CONFLICT OF INTEREST with a particular proposal, it should be recorded here. Again, the EXPLANATION field is required if there is a conflict.

Edit Reviewer Proposal Assignment

Discovery Program Review [DISCPRORV]
NNH06ZDA0010

Richard Jackson

Reviewer Information		Proposal Information	
Mailing Address:	Eastern Shore University 123 Main Street Suite 200 Anytown, MD 10023	Proposal #:	06-DISCO06-0004
Shipping Address:	Eastern Shore University 123 Main Street Suite 200 Anytown, MD 10023	Title:	Lampades
Email:	rjackson@esu.com	PI:	Merie, Nimish
Phone(s):	(0) 301-555-3003	Reviewer Role	
Affiliations:	Eastern Shore University	Select Role:	Primary Reviewer
Associations:	Global Science & Technology, Inc.	Assignment Options	
		Assignment:	Accepted
		Explanation:	<input type="text"/>
		Conflict of Interest	
		Conflict:	No

Save **Cancel**

1. Change options as necessary
2. Click **Save** when finished

A declined proposal assignment or conflict of interest will be marked in proposal listings

Remove Reviewer Proposal Assignment

A proposal assignment can be removed from a reviewer by clicking the **Delete** icon in the right column of the PROPOSALS section of the REVIEWER DETAIL page. You must have Manage Reviews permission to remove an assignment.

You may only remove an assignment if there is no individual evaluation for the proposal by the reviewer. Please refer to DELETE INDIVIDUAL EVALUATION if additional action is necessary.

After removal, the reviewer is no longer linked to that proposal within the review. However, if the reviewer was assigned to a panel because of the proposal, the reviewer's panel assignment will remain. Please refer to REMOVE PANELIST if the reviewer is no longer needed for the panel either.

Proposals (3):									
Number	Title	PI	Organization	Panel	Role	Proposal Assignment	Conflict	Evaluation	
06-DISCO06-0001	Atmospheric Anomalies	Donnelly, Tanya	South Virginia State College	DISC06-P1	Primary	Accepted	No	Submitted (07/19/2006)	
06-DISCO06-0003	Phoebus Mission	Vasila, Dom	University of Central Maryland	DISC06-P1	Secondary	Accepted	No	Draft (07/22/2006)	
06-DISCO06-0004	Lampades	Merie, Nimish	University of Eastern Wyoming	DISC06-P1	Primary	Accepted	No	Submitted (07/19/2006)	

Click **Delete** icon and then confirm the action on the next screen to remove a proposal assignment from a reviewer.

Remove Reviewer

To remove a reviewer from the reviewer pool, click the **Delete** icon in the reviewer listing that appears on the REVIEWERS tab. In order to remove a reviewer, they must have never responded to the Review Agreement or have declined it (i.e., REVIEW ASSIGNMENT STATUS of Pending, No NDA or Declined NDA), and any panel or proposal assignments must be cleared first. See REMOVE REVIEWER PROPOSAL ASSIGNMENT and REMOVE PANELIST if necessary. Only users with Manage Reviews permission can remove a reviewer from the pool.

Reviewers (6):						Add
Name	Affiliations/(Associations)	Email	Panels	Proposals	Review Assignment	
Jackson, Richard	Eastern Shore University (Global Science & Technology, Inc.)	rij@eastsu.edu	DISC06-P1	06-DISC06-0001 (S) 06-DISC06-0003 (S) 06-DISC06-0004 (P)	Accepted	✕
Jones, Mick	New London State (University of Hawaii)	mickjones@newlondon.edu	(none assigned)	(none assigned)	Pending	✕
Katsaros, Melissa	University of Georgia	mkat@uga.edu	DISC06-P1	06-DISC06-0003 (P) 06-DISC06-0004 (P)	Accepted	✕

Click **Delete** icon and then confirm the action on the next screen to remove a reviewer from the review.

Notify Reviewers

The NOTIFY REVIEWERS function provides the mechanism to notify selected reviewers of their review assignment. When triggered, this action will send email notifications to the reviewer and also provide a system notification for the reviewer on their external NSPIRES homepage the next time they login to the system.

You may only send notification to reviewers with a REVIEW ASSIGNMENT STATUS of "Pending". After notification is sent, REVIEW ASSIGNMENT STATUS will change to "No NDA" to indicate that notification has been sent.

Notify Reviewers

Step 1:

The screenshot shows the 'Discovery Program Review [DISCPRORV]' interface. The 'Reviewers (6):' table is visible, listing reviewers like Jackson, Richard, Katsaros, Melissa, Phair, Elizabeth, Timpaneades, Lori, and Young, Christopher. At the bottom of the interface, the 'Notify Reviewers' button is highlighted with a red box.

Legend

- Submitted Evaluation
- Draft Evaluation
- Evaluation Not Created

1. Click **Notify Reviewers**

Step 2:

The screenshot shows the 'Review Information' section of the 'Notify Reviewers' interface. It displays a table with checkboxes for selecting reviewers. The 'Notify Reviewers' button and the 'Preview' button are highlighted with red boxes.

Clicking the checkbox in the table header will select or deselect all rows.

Preview button provides a preview of the notification email that is sent to the reviewers.

2a. Select reviewers to notify
2b. Click **Notify Reviewers** to send notifications and change status.

Proposals

The PROPOSALS tab provides an overview of all proposals added to a review. At a glance, you can see the reviewers assigned to proposals, individual evaluation status, panel evaluation status and the overall grade. For more information, click any of the available links for a more detailed view of a specific area.

Review Module—Proposal Tab

REVIEW NAME and [ACRONYM] are displayed here along with the primary solicitation for this review

These tabs allow you to access other areas of the review, including INFO, PROPOSALS, REVIEWERS, and PANELS

Icon shows the current publication status for the review

Use filters to display only specific groups of proposals.

Click **Add button to add a proposal to the review, **Delete** button to remove.**

Number in title bar shows the number of proposals in the review.

Icons shows if proposal review copies have been generated.

Declined assignments and Conflicts of Interest are highlighted for attention.

PROPOSAL # links to the PROPOSAL DETAIL PAGE which allows you to assign a reviewer to a proposal.

Click **Generate Review Copies to generate review copies**

PANEL EVAL shows the panel evaluation status and overall grade. Click link to view the panel evaluation.

PI lists the Principal Investigator for the proposal

PRIMARY, SECONDARY 1, SECONDARY 2, and NON-PANELIST columns display the reviewers assigned to a proposal (see Proposal Tab Detail sidebar)

PANELS shows the panel the proposal is part of with a link to the Panel Information page.

Copy	Proposal #	PI	Primary	Secondary 1	Secondary 2	Non-Panelist	Panel	Panel Eval
06-DISC06-0001	Donnelly, Tanya	Jackson, Richard	Timpaneades, Lori	Young, Christopher	Ereid, Jason Nielsen, Jacob Tonazzini, Bruce	DISC06-P1	Very Good	
06-DISC06-0002	Mann, Aimee	Young, Christopher	Jackson, Richard	Jones, Mick Timpaneades, Lori	Ereid, Jason Nielsen, Jacob Tonazzini, Bruce	DISC06-P1	Good	
06-DISC06-0003	Vasilas, Dom	(none)	(none)	(none)	(none)	(unassigned)	--	
06-DISC06-0004	Merle, Nimish	Katsaros, Melissa	Jones, Mick	Schneidenooff, Lance Shrute, Dawlitz	Johnson, Jack Blaver, John Tom, Peter	DISC06-P1	(Ungraded)	
06-DISC06-0006	Alexandra, Chloe	Jones, Mick	Schneidenooff, Lance	Young, Christopher	Ereid, Jason Nielsen, Jacob Tonazzini, Bruce	DISC06-P1	(Ungraded)	
06-DISC06-0008	Muffman, William	(none)	Jackson, Richard	(none)	(none)	(unassigned)	--	
06-DISC06-0010	Margaret, Ann	Katsaros, Melissa	Jackson, Richard	(none)	Ereid, Jason Nielsen, Jacob Tonazzini, Bruce	DISC06-P1	Excellent	
06-DISC06-0011	MacAdams, Rachel	(none)	(none)	(none)	(none)	(unassigned)	--	

Proposal Tab Detail – Reviewers

The Primary, Secondary 1, Secondary 2, and Non-Panelist reviewer columns show several pieces of information in a single line. Refer to the graphic at the right for details.

Primary	Secondary 1
 Jackson, Richard	 Timpaneades, Lorl

Icon represents the evaluation status.
Click the icon to view the evaluation.

-  Draft Evaluation
-  Submitted Evaluation
-  No Evaluation created

Reviewer's name is linked to the Reviewer Information page. Click link to view contact information for the reviewer along with all assignments and statuses for the review.

Adding Proposals to a Review

Click the **Add** button in the PROPOSALS ASSIGNED TO REVIEW title bar on the review's PROPOSAL tab to add proposals to the review.

The ADD PROPOSALS TO REVIEW page that appears has an AVAILABLE PROPOSALS section and a PROPOSALS TO ADD section. Move the proposal you wish to add to the review from the left column to the right column. The AVAILABLE PROPOSALS section will list all submitted proposals from the ASSOCIATED RESPONSE STRUCTURES that are not currently part of this review. Use the lists and buttons provided to move the proposals between the columns. When you are finished, click the **Save** button to add the proposals in the PROPOSALS TO ADD section to the review. You may repeat the procedure as often as necessary.

Add Proposals to Review

1. Select proposals from AVAILABLE PROPOSALS column. For multiple selections, use shift-click to select contiguous groups and use control-click (PCs) or command-click (Macs) to make non-contiguous selections.

2. Use buttons to move selections between the columns. Note: the **Add All** and **Remove All** buttons will move all contents from one column to the other regardless of selections.

3. Click **Save** when finished to add proposals from PROPOSALS TO ADD column into the review.

Discovery Program Review [DISCPRORV]
NNH06ZDA0010

Available Proposals (104)

- 06-DISC06-0007: Smith, John
- 06-DISC06-0009: Chien, Emily
- 06-DISC06-0012: Rabourn, Tanya
- 06-DISC06-0013: Armstrong, Lance
- 06-DISC06-0015: Westerberg, Paul
- 06-DISC06-0017: Chiranjeevi, Sudheer
- 06-DISC06-0018: Groenig, Matthew
- 06-DISC06-0019: Stinson, Thomas
- 06-DISC06-0020: Mars, Christopher
- 06-DISC06-0021: Jankovitz, Bill
- 06-DISC06-0022: Patel, Suri
- 06-DISC06-0023: Geller, Monica

Proposals to Add (2)

- 06-DISC06-0014: Smith, Robert
- 06-DISC06-0016: Drummond, Philip

Add All Add Selected Remove Selected Remove All

Save Cancel

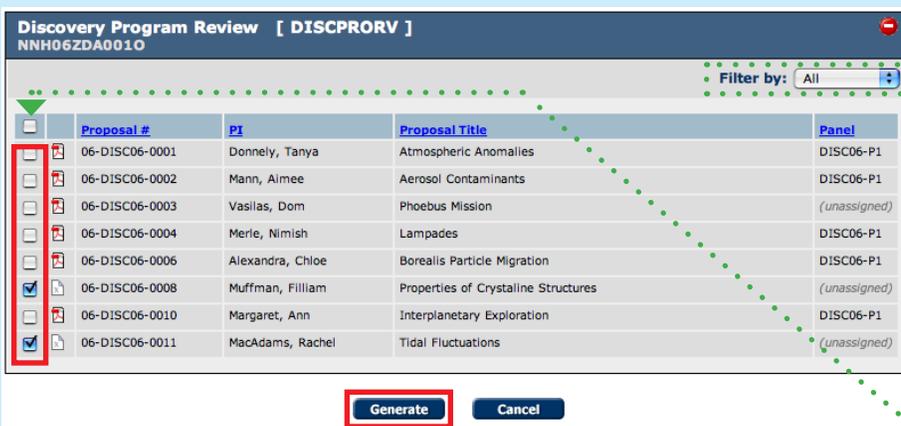
Generate Review Copies

In order for external reviewers to access the proposal for reviewing, you must generate a PROPOSAL REVIEW COPY (Full and Redacted). NSPIRES will display either the Full or Redacted Proposal Review Copy on the external systems as specified in the REVIEW INFORMATION. You may regenerate copies at any time.

To begin, click the **Generate Reivew Copies** button near the bottom of the PROPOSAL tab of the REVIEW module. On the GENERATE REVIEW COPIES PAGE, NSPIRES displays a list of all proposals added to the review. Proposals with ungenerated review copies will be preselected. Make any changes to selection by clicking the appropriate check boxes. If you select a proposal that already has a review copy generated, it will be regenerated. When the selections are complete, click the **Generate** button.

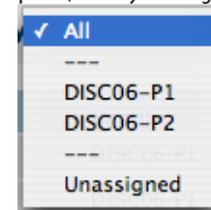
Generating review copies may take up to a couple minutes for each proposal. The icon showing the PROPOSAL REVIEW COPY STATUS will change  while they are processing.

Generate Review Copies



Proposal #	PI	Proposal Title	Panel
06-DISC06-0001	Donnelly, Tanya	Atmospheric Anomalies	DISC06-P1
06-DISC06-0002	Mann, Almee	Aerosol Contaminants	DISC06-P1
06-DISC06-0003	Vasilas, Dom	Phoebus Mission	(unassigned)
06-DISC06-0004	Merle, Nimish	Lampades	DISC06-P1
06-DISC06-0006	Alexandra, Chloe	Borealis Particle Migration	DISC06-P1
06-DISC06-0008	Muffman, Filliam	Properties of Crystalline Structures	(unassigned)
06-DISC06-0010	Margaret, Ann	Interplanetary Exploration	DISC06-P1
06-DISC06-0011	MacAdams, Rachel	Tidal Fluctuations	(unassigned)

Use the filter to control which proposals appear on the page. You can choose from all proposals, proposals by panel, or only unassigned proposals.

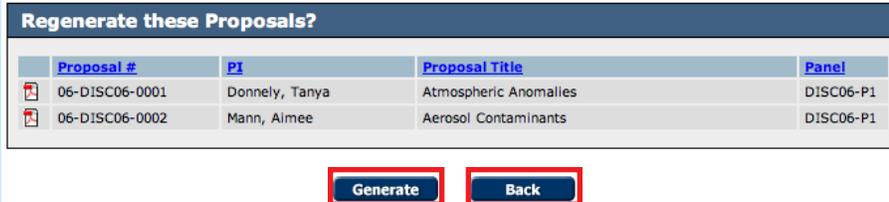


1. Click the appropriate check boxes for proposals you wish to generate review copies
2. Click the **Generate** button

Use the checkbox in the table header to select all or uncheck all proposals.

If you select proposals with a previously generated review copy, you will see a confirmation screen.:

WARNING! You have selected to replace the current review copies of the following proposals. If this is correct, confirm this action by clicking "Generate" below.



Proposal #	PI	Proposal Title	Panel
06-DISC06-0001	Donnelly, Tanya	Atmospheric Anomalies	DISC06-P1
06-DISC06-0002	Mann, Almee	Aerosol Contaminants	DISC06-P1

ICON KEY

FOR PROPOSAL REVIEW COPY STATUS

-  Review Copies Generated
-  Review Copies Not Generated
-  No Evaluation created

- 3a. Verify the selected proposals and click the **Generate** button to confirm —OR—
- 3b. Click the **Back** button to change selections.

Note

You cannot generate review copies for proposals that are in process. You must wait until processing is finished to take further actions.

		06-DISC06-0006	Alexandra, Chloe	Borealis P
		06-DISC06-0008	Muffman, Filliam	Properties

Viewing Proposal Details

Clicking the PROPOSAL # link will take you to the PROPOSAL DETAILS PAGE. On this page you will get overview of the proposal including submitting PI and organization, review copies, compiled evaluations, panel information, reviewers assigned for individual evaluation, and individual evaluations. The information is divided into three sections: PROPOSAL INFORMATION, REVIEW INFORMATION, and REVIEWERS.

Proposal Detail Page

The screenshot shows the 'Discovery Program Review [DISCPORV]' interface. The top navigation bar includes 'Info', 'Proposals', 'Reviewers', and 'Panels'. The main content area is divided into 'Proposal Information' and 'Review Information'. The 'Reviewers' section contains a table with columns for Name, Affiliations, Email, Phone, Role, Assignment, Conflict, and Evaluation. Callout boxes provide instructions for interacting with these elements.

Callout Boxes:

- REVIEW NAME and [ACRONYM] are displayed here along with the primary solicitation for this review
- These tabs allow you to access other areas of the review, including PROPOSALS, REVIEWERS, and PANELS
- Icon shows the current publication status for the review
- REVIEWER INFORMATION section shows review and panel
- Click Add button to assign reviewer to proposal.
- Click Delete icon to remove proposal assignment.
- Click Edit icon to change reviewer's proposal assignment role/status
- EVALUATION column displays current individual evaluation status. Click link to view.
- CONFLICT displays Conflict of Interest status
- ROLE and ASSIGNMENT columns shows reviewer role and proposal assignment status.
- Click reviewer NAME link to go to Reviewer Detail page
- PROPOSALS section shows the reviewers assigned to this proposal.
- PROPOSAL INFORMATION shows PI, Organization, solicitation, Review Copies, and Compiled Evaluations.
- Proposal Number and Title

Name	Affiliations/(Associations)	Email	Phone	Role	Assignment	Conflict	Evaluation
Katsaros, Melissa	University of Georgia	mkat@uga.edu	(555) 555-3432	Primary	Accepted	No	Submitted (07/25/2006)
Jones, Mick	New London State (University of Hawaii)	mickjones@newlondon.edu	(555) 555-1234	Secondary	Accepted	No	Submitted (07/27/2006)
Schneiderknopff, Lance	Fillmore University	lance@fillmore.edu	(555) 334-6654	Secondary	Accepted	No	Draft (07/22/2006)
Shrute, Dwight	Easton College (Dunder Mifflin)	shrute@easton.edu	(555) 858-4421	Secondary	No NDA	No	(none)
Johnson, Jack	University of Hawaii (Surfing The Nations Foundation)	jj@hawaii.edu	(555) 334-5525	Secondary	Accepted	Yes	Draft (07/23/2006)
Mayer, John	(East Atlanta University)	mayer@aol.com	(555) 232-1126	Non-panelist	No NDA	No	Submitted (07/25/2006)
Yorn, Peter	Long Island State College	yorn@lisc.edu	(555) 522-8692	Non-panelist	Accepted	No	Submitted (07/27/2006)

Review Copies

The REVIEW COPIES item in the PROPOSAL INFORMATION section provides links to view the Full and Redacted Proposal Review Copies, the time that they were last generated and also the ability to manually upload the Proposal Review Copies if system generation is not preferred.

Initially, both the Full and Redacted must be generated or uploaded at the same time. System generation (Generate Review Copies) always generates both review copies. If review copies already exist, you may upload either the Full or Redacted copy, or both.

While the Proposal Review Copies are being generated or uploaded (while the  icon is displayed), you may not view or upload a review copy.

Upload Review Copies

If there are no Review Copies:

Step 1:

Proposal Information	
PI:	Joe Scientist
Org:	Prestigious University
Solicitation:	NNH04ZUU001N
Review Copies:	(Review copies not generated) Upload
Compiled Evaluations:	Anonymous / Non-Anonymous Options

1. Click the **Upload** button.

Step 2:

Review Copy Upload

Note: There are currently no review copies generated for this proposal. You must upload both the Full and Redacted copies to continue.

06-DISC06-0004: Lunar Observation Platform Discovery Program Review [DISCPORRY]	
Review Copy Uploads	
<input checked="" type="checkbox"/> Full Review Copy:	Browse DISC06-0004_full.pdf
<input checked="" type="checkbox"/> Redacted Review Copy:	Browse DISC06-0004_redacted.pdf
Upload Cancel	

Filename(s) of selected files will appear next to browse button.

2a. Use the **Browse** buttons to select a file for each review copy.
2b. Click **Upload** to upload the files.

If Review Copies already exist:

Step 1:

Proposal Information	
PI:	Merle, Nimish
Org:	University of Eastern Wyoming
Solicitation:	NNH06ZDA0010
Review Copies:	Full Copy / Redacted Copy Upload <small>(Generated 06/14/2006 11:22:05 EDT by Daniels, Katerina)</small>
Compiled Evaluations:	Anonymous / Non-Anonymous Options

1. Click the **Upload** button.

Step 2:

Review Copy Upload

Please check which review copy (or both) you wish to upload and select the file using the browse button.

06-DISC06-0004: Lunar Observation Platform Discovery Program Review [DISCPORRY]	
Review Copy Uploads	
<input type="checkbox"/> Full Review Copy:	Browse DISC06-0004_full.pdf
<input type="checkbox"/> Redacted Review Copy:	Browse
Upload Cancel	

2a. Use the checkbox to select which version(s) you wish to upload.
2b. Use the **Browse** button to select a file for each selected review copy.
2c. Click **Upload** to upload the selected file(s).

Note

During file upload (and file generation) you will not be able to view the review copies or upload review copies. Once file upload (generation) is complete, both options will be available.

Proposal Information

PI:	Joe Scientist
Org:	Prestigious University
Solicitation:	NNH04ZUU001N
Review Copies:	(Review copies not available, generation in progress)
Compiled Evaluations:	Anonymous / Non-Anonymous Options

Compiled Evaluations

The COMPILED EVALUATIONS item provides links to two versions of all submitted Individual Evaluations in a single compiled format. The **Anonymous** version will anonymize all reviewer information while the **Non-Anonymous** version will include the reviewer's name.

Click the **Options** button to customize the content of the compiled evaluations and the file generated.

Compiled Evaluations

1. Click the **Options** button to customize compiled evaluations.

2. Select options
3. Click **Create** to generate compiled evaluation.

Proposal Information	
PI:	Merle, Nimish
Org:	University of Eastern Wyoming
Solicitation:	NNH06ZDA0010
Review Copies:	Full Copy / Redacted Copy Upload <small>(Generated 06/14/2006 11:22:05 EDT by Daniels, Katerina)</small>
Compiled Evaluations:	Anonymous / Non-Anonymous Options

Compile Evaluations Settings	
Evaluations to Include	
<input checked="" type="radio"/> Submitted Evaluations	<input checked="" type="radio"/> Non-Anonymous
<input type="radio"/> Submitted and Draft Evaluations	<input type="radio"/> Anonymous
Report File Type	
<input checked="" type="radio"/> RTF	
<input type="radio"/> PDF	
<input type="radio"/> Excel	
Create Back	

Assigning Reviewers to a Proposal

To assign a reviewer to a proposal, click the **Add** button in the title bar of REVIEWERS section of the PROPOSAL DETAIL PAGE. Once you assign a reviewer to a proposal, the reviewer will have a new role (REVIEWER ROLE) specific to that proposal.

After clicking the **Add** button, the **ASSIGN REVIEWER TO PROPOSAL PAGE** will be displayed. It will list all reviewers in the reviewer pool not currently assigned to the current proposal. Using the checkboxes, select the reviewers you would like to assign to this proposal and their roles.

After selection, the reviewers will be displayed in the REVIEWERS section of the PROPOSAL DETAILS PAGE.

1. Select from available reviewers using checkbox(es).
2. Select ROLE from dropdown menu for selected reviewer(s).
3. Click SELECT button to assign reviewer(s).

<input type="checkbox"/>	Name	Affiliations/(Associations)	Email	NDA	Assignment	Role
<input type="checkbox"/>	Damon, Peter	Villanova University	pdamon@villnova.edu	No NDA	No NDA	(select one)
<input type="checkbox"/>	Gallos, Steven	University of Athens <i>(Abaris college)</i>	sgallos@athens.edu	Accepted	Accepted	(select one)
<input type="checkbox"/>	Paterson, Glenn	Carnegie Mellon University <i>(University of Virginia)</i>	gp@cmu.edu	Accepted	Accepted	(select one)
<input type="checkbox"/>	Young, Christopher	North Vermont College <i>(International Business Machines Corporation)</i>	cyoung@nvc.edu	No NDA	No NDA	(select one)

Use the checkbox in the table header to select all or uncheck all proposals.

Reviewer Role (Proposal Assignment Role)

The REVIEWER ROLE (aka PROPOSAL ASSIGNMENT ROLE) designates the reviewers role for the individual review of a particular proposal they are assigned to. The reviewer will have a role for each proposal assigned. There can only be one Primary Reviewer for a proposal. You may have as many Secondary Reviewers and Non-panelist Reviewers as needed.

- **PRIMARY REVIEWER**—External member assigned to evaluate a proposal and will be a Panelist in charge of consolidating evaluations for a specific proposal.
- **SECONDARY REVIEWER**—External member assigned to evaluate a proposal and will is a panelist.
- **NON-PANELIST REVIEWER**—External member assigned to only evaluate a proposal and not join in a panel.

Edit Reviewer Proposal Assignment (Change Reviewer Role/Proposal Assignment Options/Conflict of Interest)

To change the REVIEWER PROPOSAL ASSIGNMENT options for a reviewer, click the **Edit** icon in the right column of the REVIEWERS section of the PROPOSAL DETAIL PAGE. You must have Manage Reviews permission to edit this section.

On the REVIEWER PROPOSAL ASSIGNMENT PAGE that appears, you can change the REVIEWER ROLE (i.e. Primary Reviewer, Secondary Reviewer or Non-panelist Reviewer) for a particular proposal assignment.

Additionally, if the reviewer is unable to complete an individual assignment, you can toggle the PROPOSAL ASSIGNMENT STATUS to Declined. Note that if the status is declined, an EXPLANATION is required.

Finally, if a reviewer has a CONFLICT OF INTEREST with a particular proposal, it should be recorded here. Again, the EXPLANATION field is required if there is a conflict.

A declined proposal assignment or conflict of interest will be marked in proposal listings

Edit Reviewer Proposal Assignment

1. Click **Edit** icon

Reviewers (7):								Add
Name	Affiliations/(Associations)	Email	Phone	Role	Assignment	Conflict	Evaluation	
Katsaros, Melissa	University of Georgia	mkat@uga.edu	(555) 555-3432	Primary	Accepted	No	Submitted (07/25/2006)	 
Jones, Mick	New London State (University of Hawaii)	mickjones@newlondon.edu	(555) 555-1234	Secondary	Accepted	No	Submitted (07/27/2006)	 
Schneidlenknoopf, Lance	Fillmore University	lance@fillmore.edu	(555) 334-6654	Secondary	Accepted	No	Draft (07/22/2006)	 
Shrute, Dwight	Easton College (Dunder Mifflin)	shrute@easton.edu	(555) 858-4421	Secondary	No NDA	No	(none)	 

2. Change options as necessary

Discovery Program Review [DISCPORV]
NNH06ZDA0010

Richard Jackson

Reviewer Information	Proposal Information
Mailing Address: Eastern Shore University 123 Main Street Suite 200 Anytown, MD 10023	Proposal #: 06-DISCO6-0004 Title: Lampades PI: Merie, Nimish
Shipping Address: Eastern Shore University 123 Main Street Suite 200 Anytown, MD 10023	Reviewer Role Select Role: Primary Reviewer
Email: rjackson@esu.com Phone(s): (0) 301-555-3003 Affiliations: Eastern Shore University Associations: Global Science & Technology, Inc.	Assignment Options Assignment: Accepted Explanation:
	Conflict of Interest Conflict: No

3. Click **Save** when finished

Save **Cancel**

Remove Proposal Reviewer Assignment

A REVIEWER PROPOSAL ASSIGNMENT can be removed from a proposal by clicking the **Delete** icon in the right column of the REVIEWERS section of the PROPOSAL DETAIL PAGE. You must have Manage Reviews permission to remove an assignment.

You may only remove an assignment if there is no individual evaluation for the proposal by the reviewer. Please refer to DELETE INDIVIDUAL EVALUATION if additional action is necessary.

After removal, the Reviewer is no longer linked to that proposal within the review. However, if the reviewer was assigned to a panel because of the proposal, the reviewer's panel assignment will remain. Please refer to REMOVE PANELIST if the reviewer is no longer needed for the panel either.

Remove Reviewer Proposal Assignment

Reviewers (7):								Add
Name	Affiliations/(Associations)	Email	Phone	Role	Assignment	Conflict	Evaluation	
Katsaros, Melissa	University of Georgia	mkat@uga.edu	(555) 555-3432	Primary	Accepted	No	Submitted (07/25/2006)	 
Jones, Mick	New London State (University of Hawaii)	mickjones@newlondon.edu	(555) 555-1234	Secondary	Accepted	No	Submitted (07/27/2006)	 
Schneidlenknoopf, Lance	Fillmore University	lance@fillmore.edu	(555) 334-6654	Secondary	Accepted	No	Draft (07/22/2006)	 
Shrute, Dwight	Easton College (Dunder Mifflin)	shrute@easton.edu	(555) 858-4421	Secondary	No NDA	No	(none)	 

Click **Delete** icon and then confirm the action on the next screen to remove a proposal assignment from a reviewer.

Panels

A PANEL is a meeting of PANEL ATTENDEES (comprised of PANELISTS, PANEL CHAIR, PANEL CO-CHAIR, and/or EXECUTIVE SECRETARY) to discuss and collectively evaluate a set of proposals, and which results in a panel evaluation for each proposal discussed by the panel. The panel can be physical (in one place) or virtual (teleconference, web conference, etc.), and which has a definite location (for physical only) and date.

The PANELS tab of the review module will list all panels part of a review and give you the option of adding a panel.

Review Module—Panel Tab

The screenshot shows the 'Discovery Program Review [DISCPRORV]' interface. The 'Panels' tab is active, displaying a table of panels. Callout boxes provide the following information:

- REVIEW NAME and [ACRONYM] are displayed here along with the primary solicitation for this review**: Points to the header 'Discovery Program Review [DISCPRORV] NNH06ZDA0010'.
- These tabs allow you to access other areas of the review, including INFO, PROPOSALS, REVIEWERS, and PANELS**: Points to the navigation tabs 'Info', 'Proposals', 'Reviewers', and 'Panels'.
- Icon shows the current publication status for the review**: Points to a green checkmark icon in the top right corner.
- Click Add button to add a panel to the review.**: Points to an 'Add' button in the top right of the panel list.
- Icon indicated panel publication status:**
 - Published
 - Not Published
- PANEL NAME links to the PANEL INFORMATION section to view/modify panel attributes and assignments.**: Points to the 'Panel Name' column header.
- ACRONYM shows the Panel Acronym**: Points to the 'Acronym' column header.
- START and END list the start and end dates for the panel.**: Points to the 'Start' and 'End' column headers.
- LOCATION displays where the panel takes place.**: Points to the 'Location' column header.

Panel Name	Acronym	Start	End	Location
Discovery Program Panel 1	DISC06-P1	08/02/2006	08/03/2006	Washington Marriott 2120 M Street, NW Washington, DC
Discovery Program Panel 2	DISC06-P2	08/12/2006	08/14/2006	Washington Marriott 2120 M Street, NW Washington, DC

Adding a Panel to a Review

NSPIRES also offers you the option of assigning one or more panels to a review at any time before a REVIEW END DATE. Click the **Add** button in the PANEL title bar to create a new panel. You must have Manage Review permissions to add a panel.

On the ADD PANEL TO REVIEW PAGE, you will need to enter the basic panel information, including the PANEL NAME, PANEL ACRONYM, PANEL START and PANEL END dates. Additionally, you can select a new INDIVIDUAL EVALUATIONS DUE date for proposals assigned to this panel and enter the location of where the panel will be held. You will be able to add additional information such as support personnel, proposals and attendees after the panel is created.

The PANEL NAME is the full name of the panel. The PANEL ACRONYM is the short abbreviation used to identify the panel on many screens throughout the NSPIRES system (e.g., the PANELS column in the PROPOSALS tab).

By default, NSPIRES will pre-populate the panel's INDIVIDUAL EVALUATIONS DUE date with the date entered in the REVIEW INFORMATION. However, each Panel may have its own INDIVIDUAL EVALUATIONS DUE date for proposals assigned to it. If, due to timing issues, you wish to use a different date for these individual evaluations, enter a new date. However, the date must be before the PANEL START DATE.

After creating a new PANEL, you will be taken to the PANEL INFORMATION tab to view the panel and enter additional information as desired.

Adding a Panel

Step 1:

Panel Name	Acronym	Start	End	Location
Discovery Program Panel 1	DISC06-P1	08/02/2006	08/03/2006	Washington Marriott 2120 M Street, NW Washington, DC

1. Click the **Add** button.

Step 2:

Individual Evaluations Due date will be pre-populated with date from Review Information. However, each panel can have its own Individual Evaluations Due date.

- 2a. Enter the panel information
- 2b. Click **Save** to create panel.

Panel Information

When you access the panel by clicking a Panel Acronym link or creating a new panel, the first page that will be displayed is the PANEL INFORMATION PAGE (the INFO tab). You must access this page any time you want to view/edit panel information, view/add support personnel for a panel, or view/edit the panel controls for external reviewers. As you can see, NSPIRES also provides access to other areas specific to this panel, such as the PANEL PROPOSALS and ATTENDEES tabs. The various sections of this page you should be familiar are shown below.

Panels—Panel Information Tab

The screenshot shows the 'Discovery Program Review [DISCPRORV]' page. At the top, the review name and acronym are displayed. Below this is a navigation bar with tabs for 'Info', 'Proposals', 'Reviewers', and 'Panels'. The 'Panels' tab is active, showing 'Discovery Program Panel 1 [DISC06-P1]' with sub-tabs for 'Info', 'Panel Proposals', and 'Attendees'. The main content area is divided into three sections: 'Panel Information', 'Panel Support Personnel', and 'External Panel Controls'. At the bottom, there are buttons for 'Publication Release' and 'Delete Panel'.

Callout Boxes:

- REVIEW NAME and [ACRONYM] are displayed here along with the primary solicitation for this review** (points to the top header)
- These tabs allow you to access other areas of the review, including INFO, PROPOSALS, REVIEWERS, and PANELS** (points to the top navigation bar)
- These tabs allow you to access other areas of the panel, including PANEL PROPOSALS and ATTENDEES.** (points to the sub-navigation bar)
- Icon shows the current publication status for the review** (points to a green checkmark icon)
- Icon shows the current publication status for the panel** (points to a red 'X' icon)
- PANEL NAME and [ACRONYM] are displayed here** (points to the panel title)
- REVIEW SUPPORT PERSONNEL shows support personnel assigned to a review.** (points to the support personnel table)
- EXTERNAL PANEL CONTROLS access to external NSPIRES panel functions.** (points to the control section)
- Publication Release button allows you to set the publication status of a panel.** (points to the 'Publication Release' button)
- Delete Review button allows those with permission to delete a review.** (points to the 'Delete Panel' button)
- Review Information displays general review information** (points to the 'Panel Information' section)

Name	Phone	Role	Y	N	Y	N
Cino, Salvatore	202-555-0881	Program Officer	y	y		
Munroe, James	202-555-1234	Peer Review Administrator	y	y		
Tesla, Ingrid	202-555-9030	IT Support	n	n		

Panel Information

The PANEL INFORMATION section displays general information about the panel including the PANEL NAME and PANEL ACRONYM, the PANEL START and PANEL END dates, the panel's INDIVIDUAL EVALUATIONS DUE date, a link to the PANEL INSTRUCTIONS (optional) and the PANEL NOTE (optional). The PANEL INSTRUCTIONS and PANEL NOTE will appear on external NSPIRES for reviewers to download or read.

If you have Manage Review permissions, you can edit this section. The data entered while creating a panel (PANEL NAME, PANEL ACRONYM, PANEL START and PANEL END dates, and the panel's INDIVIDUAL EVALUATIONS DUE date) can be changed here along with the optional items: PANEL INSTRUCTIONS and PANEL NOTE.

The PANEL INSTRUCTIONS contain a label, which will appear as the linked text used for downloading the instructions file on the external site, and the file itself. If no file has been attached to this review, a **Browse** button will appear to select a file to upload. If a file already exists, the filename will appear along with a **Replace** button to select a new file.

The PANEL NOTE is a text field that will be displayed on the external NSPIRES site for reviewers. Use it for a quick and easy reference for reviewers.

Editing Panel Information

Discovery Program Panel 1 [DISC06-P1]
Discovery Program Review [DISCPORV]

Panel Information

Panel Name: *

Panel Acronym: *

Panel Start: *

Panel End: *

Ind. Evaluations Due: *

Panel Location:

Room #:

Panel Instructions: Label:
File:

Panel Note:

(* Fields marked with an asterisk are required)

After a file is selected, the page will reflect the selection:

Label:
File: [DISC06PROV_Instructions.pdf](#)

1. Enter or edit information as necessary.
2. Click **Save** when finished.

PANEL NOTE will be displayed on external NSPIRES *Panel Information* page:

Home NASA Research Help Logout

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Panel: **DISC06 Panel I [DISC06-P1]**

Review: Discovery Program Review 2 [DISCPORV2]

Panel Dates: 08/02/2006 – 08/03/2006
Individual Evaluations Due: 08/02/2006
Panel Location: Washington Marriott
2120 M Street, NW
Washington, DC
Room: Independence Room

Panel Support Personnel: [Cris, Sabrina \(Program Officer\)](#) (202) 555-1232
[Dale, Ann \(Exec Review Admin\)](#) (202) 555-1211
Panel Instructions: [DISC06 Panel Instructions](#)

Note:
If you have any questions on review instructions, please contact Alice Smith at 202-555-2222 ext 122.

Proposals Assigned to Panel (7)

Proposal #	Title	PI	Organization	Primary	Panel Evaluation Status	Grade	Index	Evals
06-DISC06-0002	Aeroid Contaminants	Maria, Arnes	East Potomac University	Young, Christopher	Draft	Upgraded	View All	Comments
06-DISC06-0003	Phobos Mission	Yasuda, Don	University of Central Maryland	Kataras, Melissa	Draft	Upgraded	View All	Comments
06-DISC06-0004	Lampades	Merit, Nensih	University of Eastern Wyoming	Kataras, Melissa	Submitted	Very Good	View All	Comments
06-DISC06-0005	Bimodal Particle Migration	Alexandra, Chise	East Potomac University	Jones, Mick	Draft	Good	View All	Comments
06-DISC06-0006	Properties of Crystalline Structures	Muffman, Fillam	South Virginia State College	Young, Christopher	Draft	Upgraded	View All	Comments
06-DISC06-0009	Sharia Lama Shama Lama Rama Ding Dong	Day, Otis	Faber College	Kataras, Melissa	Draft	Very Good	View All	Comments
06-DISC06-0011	Tidal Fluctuations	Hersch, Kristie	University of Eastern Wyoming	Schneiderknopf, Lance	Draft	Very Good	View All	Comments

Panel Support Personnel

The PANEL SUPPORT PERSONNEL section lists any internal NSPIRES users assigned to a support role for the panel along with their contact information and their notification and external display settings.

NAME displays the name of the person assigned and is also an email link.

PHONE and ROLE display the phone number and role for each person.

Click the **Add** button to add additional support personnel to the review

Name	Phone	Role	Notification	External Display	Actions
Cino, Salvatore	202-555-0881	Program Officer	y	y	
Munroe, James	202-555-1234	Peer Review Administrator	y	y	
Tesla, Ingrid	202-555-9030	IT Support	n	n	

The column indicates the notification settings:
y – receives notifications
n – do not receive notifications

The column indicates the external display settings:
y – display on external NSPIRES
n – do not display

Click the **Edit** icon to change the option settings.

Click the **Delete** icon to remove a person.

Support Roles and Options

Each person added as support personnel will have a role specified and their support options set.

The support roles are defined below, you may have more than one user assigned to any given role.

- **PROGRAM OFFICER (PO)**—NASA Officer
- **PEER REVIEW ADMINISTRATOR (PRA)**—An internal user who administers the review.
- **ASSISTANT PEER REVIEW ADMINISTRATOR (ARPA)**—An internal user who administers the review.
- **LOGISTICS SUPPORT**—An internal user who supports the panel in logistics
- **IT SUPPORT**—An internal user who provides IT support.

The NOTIFICATION option determines if the selected person will receive NSPIRES system generated notifications concerning the review (e.g., a reviewer declines the review assignment or declares a conflict of interest). The EXTERNAL DISPLAY option sets whether the support person's name and contact information will be shown on the external NSPIRES Review Information Page.

Adding Support Personnel

Click the **Add** button in the section's title bar to begin the process of adding a support personnel. Only users with Manage Review permission are able to add personnel.

To add a support person, you must first search for the user. NSPIRES will only search the internal NSPIRES database of registered users. Then select a user and assign their role and set their options.

Adding Support Personnel

Step 1:

Enter Search Criteria

First Name:

Last Name:

Username:

Email:

NSPIRES will only search the internal NSPIRES database for registered users.

You may use one or any combination of the search criteria to locate an internal user.

1. Enter search criteria and click **Search**

Step 2:

Search Results

	Name	Internal Affiliations (Agency/Center/Directorate/Division/Discipline)	Email	Phone
<input checked="" type="radio"/>	Bush, Peter	NASA/Headquarters	pbush@nasaprs.com	202-555-1212
<input type="radio"/>	Bush, Porter	NASA/Headquarters/Science Mission Directorate	porterb@nasaprs.com	202-555-2525
<input type="radio"/>	Bushetsky, Svetlana	NASA/Headquarters/Science Mission Directorate NASA/Headquarters/Exploration Systems Mission Directorate	sveta@nasaprs.com	202-555-8782
	Bush, Zoe	NASA/Johnson Space Center/Exploration Systems Mission Directorate (ineligible affiliation)	zbush@nasaprs.com	202-555-4220

You may only add individuals affiliated with one of the associated solicitations in the review. Ineligible individuals will be marked as ineligible and cannot be selected.

2. Select user from list and click **Select** button

Step 3:

Select Support Personnel Options

Personnel Information

Name: Bush, Porter

NASA Center/Company: NASA Research and Education Support Services

Address: 500 E Street, SW
Suite 200
Washington, DC 20024

Email: porterb@nasaprs.com

Office Phone: 202-555-2525

Internal Affiliations: NASA/Headquarters

Employee Type: Gov't Contractor

Support Personnel Options

Select Role:

Notifications: Send Email Notifications

External Display: Display on External

Note

You can only add personnel one at a time because the options must be set individually.

3a. Verify correct user is selected

3b. Select ROLE, NOTIFICATIONS, and EXTERNAL DISPLAY

3c. Click **Save**

Controls if person will be listed on external NSPIRES:

nspires

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Account Mgmt | Organization Mgmt | Proposals | Reviews | Awards

Panel: DISC06 Panel I [DISC06-P1]

Review: Discovery Program Review 2 [DISCPRORV2]

Panel Dates: 08/07/2008 - 08/09/2008

Individual Evaluations Due: 08/01/2008

Panel Location: Washington Marriott
2120 M Street, NW
Washington, DC

Room: Independence Room

Panel Support Personnel: [Panel Support Personnel](#)

Panel Instructions: [DISC06 Panel Instructions](#)

Col. Selvalatha Eswaran Pillay: (202) 855-1232
Disc_ACS_Eswaran_Selvalatha: (202) 555-3111

External Panel Controls

The EXTERNAL PANEL CONTROLS are used to grant permissions to external users for specific panel actions, e.g., editing a panel evaluation. Permissions are role based, applied per proposal in the panel, and are additive (meaning as long as one condition is true for a specific proposal, then that action is permitted). For example, if a panel attendee is the *Panel Chair* and also a *Primary Reviewer* for a particular proposal, then using the settings shown on the right, this panel attendee may edit the panel evaluation for that particular proposal. However, on a different proposal in the panel where this attendee is neither a primary or secondary reviewer, he cannot edit the panel evaluation.

External Panel Controls		Edit
		Edit Grades & Panel Evaluations
Panel Chair/Co-chair	<input type="checkbox"/>	
Primary Reviewer	<input checked="" type="checkbox"/>	
Secondary Reviewer	<input checked="" type="checkbox"/>	
Executive Secretary	<input type="checkbox"/>	
Panelist	<input type="checkbox"/>	
Review Chair/Co-chair	<input type="checkbox"/>	

Checked roles are granted permissions for the action defined by the column. Use the **Edit** button to change selections.

Panel Publication Release

PANEL PUBLICATION RELEASE controls the publication status of a panel. A panel will only appear on the external NSPIRES if it is approved for release (and the review it is part of is also approved for release and currently ongoing).

To toggle this status, click the **Publication Release** button near the bottom of the PANEL INFO tab and make your selection accordingly.

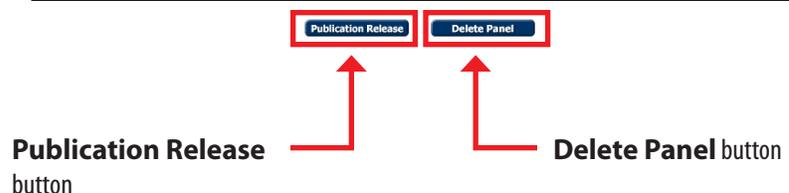
The screenshot shows the 'Discovery Program Review [DISCPORV]' interface. The 'Panels' tab is selected, showing 'Discovery Program Panel 1 [DISC06-P1]'. The 'External Panel Controls' section is visible, with the following table:

		Edit Grades & Panel Evaluations
Panel Chair/Co-chair	<input type="checkbox"/>	
Primary Reviewer	<input checked="" type="checkbox"/>	
Secondary Reviewer	<input checked="" type="checkbox"/>	
Executive Secretary	<input type="checkbox"/>	
Panelist	<input type="checkbox"/>	
Review Chair/Co-chair	<input type="checkbox"/>	

Delete Panel

DELETE PANEL will delete a panel from a review. You may only delete an “empty” panel, meaning there are no assigned panels or attendees.

To delete a panel, click the **Delete Panel** button near the bottom of the PANEL INFO tab. You will be asked to confirm your action before the panel is actually deleted. This action cannot be undone.



Panel Proposals

The PANEL PROPOSALS tab provides an overview of all proposals added to a panel. At a glance, you can see the reviewers assigned to proposals, individual evaluation status, panel evaluation status and the overall grade. You will also have the ability to compile the individual evaluations for a specific proposal or all panel proposals. For more information, click any of the available links for a more detailed view of a specific area.

Panels—Panel Proposals Tab

The screenshot shows the 'Discovery Program Review [DISCPORV]' interface. At the top, there are tabs for 'Info', 'Proposals', 'Reviewers', and 'Panels'. Below this is 'Discovery Program Panel 1 [DISC06-P1]' with tabs for 'Info', 'Panel Proposals', and 'Attendees'. The main area is titled 'Proposals Assigned to Panel (5)' and contains a table with columns for Proposal #, PI, Primary, Secondary 1, Secondary 2, Non-Panelist, Compiled Evaluations, and Panel Evaluations. The table lists five proposals with their respective reviewers and evaluation statuses. Callout boxes provide detailed explanations for various UI elements.

REVIEW NAME and [ACRONYM] are displayed here along with the primary solicitation for this review

These tabs allow you to access other areas of the review, including INFO, PROPOSALS, REVIEWERS, and PANELS

These tabs allow you to access other areas of the panel, including PANEL PROPOSALS and ATTENDEES.

Icon shows the current publication status for the review

PANEL NAME and [ACRONYM] are displayed here

Icon shows the current publication status for the panel

Number in title bar shows the number of proposals in the panel.

Click **Add button to add a proposal to the panel, **Delete** button to remove.**

Icons shows if proposal review copies have been generated.

Declined assignments and Conflicts of Interest are highlighted for attention.

PROPOSAL # links to the PANEL PROPOSAL DETAIL page.

PI lists the Principal Investigator for the proposal

PRIMARY, SECONDARY 1, SECONDARY 2, and NON-PANELIST columns display the reviewers assigned to a proposal (see *Proposal Tab Detail* sidebar)

Compile links allow you to generate compiled evaluations for a proposal.

PANEL EVALUATIONS shows the panel evaluation status and overall grade. Click link to view the panel evaluation.

Proposal Tab Detail – Reviewers

The PRIMARY, SECONDARY 1, SECONDARY 2, and Non-PANELIST reviewer columns show several pieces of information in a single line. Refer to the graphic at the right for details.

Primary	Secondary 1
 Jackson, Richard	 Timpeneades, Lori

Icon represents the evaluation status. Click the icon to view the evaluation.

	Draft Evaluation
	Submitted Evaluation
	No Evaluation created

Reviewer's name is linked to the REVIEWER INFORMATION page. Click link to view contact information for the reviewer along with all assignments and statuses for the review.

Adding Proposals to Panel

In order for a proposal to have a panel evaluation, it must be added to a panel. Proposals are added to panels in a way similar to how they are added to the review. A proposal may only be assigned to one panel within a review.

Click the **Add** button in the PROPOSALS ASSIGNED TO PANEL title bar on the PANEL PROPOSAL tab to add proposals to the panel.

The ADD PROPOSALS TO PANEL PAGE that appears has an AVAILABLE PROPOSALS section and a PROPOSALS TO ADD section. Move the proposal you wish to add to the panel from the left column to the right column. The AVAILABLE PROPOSALS section will list all proposals in the review's proposal pool that are not currently part of a panel. Use the lists and buttons provided to move the proposals between the columns. When you are finished, click the **Save** button to add what is listed in the PROPOSALS TO ADD section to the panel. You may repeat the procedure as often as necessary.

Add Proposals to Panel

1. Select proposals from AVAILABLE PROPOSALS column. For multiple selections, use shift-click to select contiguous groups and use control-click (PCs) or command-click (Macs) to make non-contiguous selections.

2. Use buttons to move selections between the columns. Note: the **Add All** and **Remove All** buttons will move all contents from one column to the other regardless of selections.

3. Click **Save** when finished to add proposals from PROPOSALS TO ADD column into the review.

Removing Proposal from Panel

Removing a proposal from a panel will remove the proposal's assignment to the panel and delete any panel evaluation for the proposal. This action will not effect any reviewer assignments to the proposal or any individual reviews associated with the proposal. Additionally, any reviewers assigned as attendees will remain attendees.

To remove a panel proposal, click the **Delete** icon in the right column on the PANEL PROPOSAL tab. You will be asked to confirm your action before the proposal is actually removed from the panel. After a proposal has been removed from a panel, it is again available for assignment to any panel within the review.

Proposals Assigned to Panel (5):

Proposal #	PI	Primary	Secondary 1	Secondary 2	Non-Panelist	Completed Evaluations	Panel Evaluations
06-DISC06-0001	Donnelly, Tanya	Jackson, Richard	Timpaneades, Lori	Young, Christopher	Freig, Jason Nielsen, Jacob Tonazzini, Bruce	Compile	Very Good
06-DISC06-0002	Mann, Aimee	Young, Christopher	Jackson, Richard	Jones, Mick	Freig, Jason Nielsen, Jacob	Compile	Good

Click the Delete icon to remove a proposal from a panel.

Viewing Panel Proposal Details

Clicking the PROPOSAL # link within a panel will take you to the PANEL PROPOSAL DETAIL PAGE. On this page NSPIRES displays information specific to this proposal, such as an overview of the proposal including submitting PI and organization, review copies, compiled evaluations, panel information, panel evaluation, and attendees assigned to the panel. The information is divided into three sections: PROPOSAL INFORMATION, PANEL EVALUATION, and ATTENDEES.

Panel Proposal Detail Page

The screenshot shows the 'Panel Proposal Detail Page' for 'Discovery Program Review [DISCPRORV]'. The page is divided into several sections:

- Header:** Displays the review name and acronym, panel name and acronym, and proposal number and title.
- Navigation:** Tabs for 'Info', 'Proposals', 'Reviewers', and 'Panels' allow access to other review areas. 'Info', 'Panel Proposals', and 'Attendees' tabs allow access to other panel areas.
- Proposal Information:** Shows PI (Merle, Nmish), Org (University of Eastern Wyoming), Solicitation (NNH06ZDA0010), Review Copies (Full Copy / Redacted Copy), and Compiled Evaluations (Anonymous / Non-Anonymous).
- Panel Evaluation:** Shows Overall Grade (Very Good) and Status (Submitted on 08/03/2006).
- Attendees (6):** A table listing attendees with columns for Name, Email, Phone, Panel Role, Reviewer Role, Evaluation, Affiliations, Conflict, and Review Status. Each row includes an 'Edit' icon for conflict status.

Callout boxes provide detailed explanations for these elements:

- REVIEW NAME and [ACRONYM]** are displayed here along with the primary solicitation for this review.
- PANEL NAME and [ACRONYM]** are displayed here.
- PROPOSAL NUMBER and TITLE** are displayed here.
- PROPOSAL INFORMATION** shows PI, Organization, solicitation, Review Copies, and Compiled Evaluations.
- ATTENDEES** section shows all panel attendees and relationship to this proposal.
- Click attendee **NAME** link to go to **ATTENDEE DETAIL PAGE**.
- EVALUATION** column displays current individual evaluation status. Click link to view.
- CONFLICT** displays Conflict of Interest status.
- REVIEW STATUS** displays review status of attendee.
- Icon shows the current publication status for the review.
- Icon shows the current publication status for the panel.
- PANEL EVALUATION** shows the status and **OVERALL GRADE** of the panel evaluation. Click **View** button to view the evaluation form.
- Click **Edit** icon to set attendee's conflict of interest status for this proposal.

Review Copies

The REVIEW COPIES item in the PROPOSAL INFORMATION section provides links to view the Full and Redacted Proposal Review Copies, the time that they were last generated and also the ability to manually upload the proposal review copies if system generation is not preferred.

Initially, both the FULL and REDACTED review copies must be generated or uploaded at the same time. System generation (**Generate Review Copies**) always generates both review copies. If review copies already exist, you may upload either the Full or Redacted copy, or both.

While the proposal review copies are being generated or uploaded (while the  icon is displayed), you may not view or upload a review copy.

Upload Review Copies

If there are no Review Copies:

Step 1:

Proposal Information	
PI:	Joe Scientist
Org:	Prestigious University
Solicitation:	NNH04ZUU001N
Review Copies:	(Review copies not generated) 
Compiled Evaluations:	Anonymous / Non-Anonymous 

1. Click the **Upload** button.

Step 2:

Review Copy Upload

Note: There are currently no review copies generated for this proposal. You must upload both the Full and Redacted copies to continue.

06-DISC06-0004: Lunar Observation Platform Discovery Program Review [DISCPORV]	
Review Copy Uploads	
<input checked="" type="checkbox"/> Full Review Copy:	 DISC06-0004_full.pdf
<input checked="" type="checkbox"/> Redacted Review Copy:	 DISC06-0004_redacted.pdf
 	

File names of selected files will appear next to browse button.

2a. Use the **Browse** buttons to select a file for each review copy.
2b. Click **Upload** to upload the files.

If Review Copies already exist:

Step 1:

Proposal Information	
PI:	Merle, Nimish
Org:	University of Eastern Wyoming
Solicitation:	NNH06ZDA0010
Review Copies:	 Full Copy /  Redacted Copy (Generated 06/14/2006 11:22:05 EDT by Daniels, Katerina) 
Compiled Evaluations:	Anonymous / Non-Anonymous 

1. Click the **Upload** button.

Step 2:

Review Copy Upload

Please check which review copy (or both) you wish to upload and select the file using the browse button.

06-DISC06-0004: Lunar Observation Platform Discovery Program Review [DISCPORV]	
Review Copy Uploads	
<input type="checkbox"/> Full Review Copy:	 DISC06-0004_full.pdf
<input type="checkbox"/> Redacted Review Copy:	 DISC06-0004_redacted.pdf
 	

2a. Use the checkbox to select which version(s) you wish to upload.
2b. Use the **Browse** button to select a file for each selected review copy.
2c. Click **Upload** to upload the selected file(s).

Note

During file upload (and file generation) you will not be able to view the review copies or upload review copies. Once file upload (generation) is complete, both options will be available.

Proposal Information	
PI:	Joe Scientist
Org:	Prestigious University
Solicitation:	NNH04ZUU001N
Review Copies:	 (Review copies not available, generation in progress)
Compiled Evaluations:	Anonymous / Non-Anonymous 

Compiled Evaluations

The COMPILED EVALUATIONS item provides links to two versions of all submitted INDIVIDUAL EVALUATIONS in a single compiled format. The ANONYMOUS version will anonymize all reviewer information while the NON-ANONYMOUS version will include the reviewer's name.

Click the **Options** button to customize the content of the compiled evaluations and the file generated.

Compiled Evaluations

1. Click the **Options** button to customize compiled evaluations.
2. Select options
3. Click **Create** to generate compiled evaluation.

The screenshot shows the 'Compiled Evaluations' interface. At the top, there is a 'Proposal Information' section with fields for PI (Merle, Nimish), Org (University of Eastern Wyoming), Solicitation (NNH06ZDA0010), and Review Copies (Full Copy / Redacted Copy). Below this is a 'Compile Evaluations Settings' section with two sub-sections: 'Evaluations to Include' (Submitted Evaluations selected) and 'Options' (Non-Anonymous selected). There is also a 'Report File Type' section with RTF selected. At the bottom, there are 'Create' and 'Back' buttons.

Conflicts of Interest

Just as CONFLICTS OF INTEREST exist between individual reviewers and a proposal, they can exist between a panelist and one of the proposals assigned to a panel. When managing a panel, you can declare a conflict of interest between an attendee and a proposal, or the attendee can declare it from the external site. Also, internal users with the appropriate permissions may undeclare a conflict of interest.

Conflicts of Interest are established between an individual reviewer and a proposal. As such, they are outside of the review context and will remain in effect even if a reviewer is no longer participating in a review.

To view or declare/undeclare a conflict of interest, click on the **Edit** button to go to the ATTENDEE PROPOSAL ASSIGNMENT PAGE.

Conflicts of Interest

Step 1:

The screenshot shows a table of attendees. The table has columns for Name, Email, Phone, Panel Role, Reviewer Role, Evaluation, Affiliations/(Associations), Conflict, and Review Status. The last row, for Lori Timpaneades, has an edit icon (a square with a pencil) highlighted with a red box.

1. Click the **Edit** icon to edit/view the ATTENDEE PROPOSAL ASSIGNMENT PAGE.

Step 2:

The screenshot shows the 'Attendee Information' form for Lori Timpaneades. The 'Conflict of Interest' section has a dropdown menu set to 'Yes' and an 'Explanation' field containing 'PI is my brother-in-law.' Red arrows point to the dropdown menu and the explanation field.

2a. Use the dropdown menu to declare or undeclare a conflict.
 2b. Enter an EXPLANATION if there is a conflict.
 2c. Click **Save** to save changes.

Attendees

The panel ATTENDEES tab provides an overview of all external users attending a panel meeting. At a glance, you can check an attendees PANEL ROLE, AFFILIATIONS and ASSOCIATIONS, all individual proposal assignments with current evaluation status and role, and contact information. For more information, click any of the available links for a more detailed view of a specific area.

Panels—Attendees Tab

The screenshot shows the 'Attendees' tab for 'Discovery Program Panel 1 [DISC06-P1]'. The interface includes a navigation bar with tabs for 'Info', 'Proposals', 'Reviewers', and 'Panels'. Below the navigation is a table of attendees with columns for Name, Role, Affiliations/(Associations), Email, Phone, and Assignment. A legend at the bottom right explains the icons used in the Assignment column.

Discovery Program Review [DISCPRORV]
 NNH06ZDA0010

Discovery Program Panel 1 [DISC06-P1]

Panel Attendees (12)

Name	Role	Affiliations/(Associations)	Email	Phone	Assignment
Young, Christopher	Chair	North Vermont College <i>(International Business Machines Corporation)</i>	cyoung@nvc.edu	555-555-1200	06-DISC06-0001 (S) 06-DISC06-0002 (P) 06-DISC06-0006 (S)
Jackson, Richard	Panelist	Eastern Shore University <i>(Global Science & Technology, Inc.)</i>	ri@eastsu.edu	555-232-5633	06-DISC06-0001 (P) 06-DISC06-0002 (S) 06-DISC06-0010 (S)
Jones, Mick	Panelist	New London State <i>(University of Hawaii)</i>	mickjones@newlondon.edu	555-555-3432	06-DISC06-0002 (S) 06-DISC06-0006 (P)
Katsaros, Melissa	Panelist	University of Georgia	mkat@uga.edu	555-555-1234	06-DISC06-0004 (P) 06-DISC06-0010 (P)
Schneidknopf, Lance	Panelist	<i>(none)</i>	lance@aol.com	555-334-6654	06-DISC06-0004 (S) 06-DISC06-0006 (S)
Timpaneades, Lori	Panelist	Eastern Michigan University <i>(Dynamic Systems, Inc.)</i>	ltimp@emv.edu	555-555-6700	06-DISC06-0001 (S) 06-DISC06-0002 (S)

Legend:

- Submitted Evaluation
- Draft Evaluation
- No Evaluation Created
- (P)** Primary Reviewer
- (S)** Secondary Reviewer

NSPIRES will automatically add all primary and secondary reviewers for a proposal to the list of attendees when a proposal is added to a panel. However, removing a proposal from a panel will not automatically remove an attendee. If a particular attendee is no longer desired, they will have to be manually removed.

Panel Roles

All panel attendees will have one of four PANEL ROLES. PANEL ROLES are independent of any REVIEW ROLE or REVIEWER ROLE that may exist for an attendee. Attendees who are automatically assigned to a panel when a proposal is added are given the role of *Panelist*. You may edit their roles by viewing the attendee's information page.

Panel Roles	
PANEL CHAIR	The Panel Chair is an external NSPIRES user who oversees the panel and facilitates the meeting. There can be only one panel chair.
PANEL CO-CHAIR	The Panel Co-chair is an external NSPIRES user who assists, and can perform the same functions as, the panel chair.
PANELIST	A Panelist is an external NSPIRES user who attends the panel and participates in the discussion and evaluation of proposals.
EXECUTIVE SECRETARY	The Executive Secretary is an external NSPIRES user who will assist in managing the panel and in documenting the panel proceedings and panel reviews.

Adding Attendees to a Panel

If you would like to add an attendee to a panel that is not associated with a panel proposal as a primary or secondary reviewer, you may add any user in the reviewer pool. If they are not currently in the reviewer pool, you must add them as a reviewer first.

To add an attendee, you must have Manage Review permissions. To begin the process, click the **Add** button in the PANEL ATTENDEES section title bar.

On the ADD PANEL ATTENDEES PAGE, NSPIRES will display a list of all reviewers from the reviewer pool not currently assigned to this panel. Select the member(s) you wish to add to the panel from the list and change the PANEL ROLE as necessary. You may select multiple reviewers. Click the **Add** button when your selections are complete.

Adding an Attendee

Available Reviewers for this Panel

☐	Name	Affiliations/(Associations)	Email	Phone	Status	Role
<input type="checkbox"/>	Damon, Peter	Villanova University	pdamon@villanova.edu	202-555-8887	Activated	Panelist
<input type="checkbox"/>	Gallos, Steve	University of Athens <small>(Atlantis College)</small>	sgallos@athens.edum	555-422-6533	Activated	Panelist
<input type="checkbox"/>	Phair, Elizabeth	Oberlin College	lizphair@oberlin.edu	555-332-8701	Activated	Panelist
<input checked="" type="checkbox"/>	Tairbekov, Chingiz	(none)	ctairbekov@coolmail.com	555-402-8224	Activated	<input checked="" type="checkbox"/> Panelist <input type="checkbox"/> Panel Chair <input type="checkbox"/> Panel Co-Chair <input type="checkbox"/> Executive Secretary

1. Select the appropriate checkbox(es)
2. Select a ROLE from the drop-down list
3. Click the **Add** button

Note

A panel can have only one PANEL CHAIR, but as many of the other roles as necessary.

Note

Reviewers can be assigned to multiple panels.

Remove Attendee from Panel

Removing a panel attendee will remove a reviewer's assignment to the panel. You can only remove an attendee that is not a PRIMARY REVIEWER or SECONDARY REVIEWER for a proposal currently in the panel. If the attendee is a primary or secondary reviewer you must either change the attendee's REVIEWER ROLE or remove the proposal from the panel before the system will allow you to remove the attendee.

To remove an attendee, click the **Delete** icon in the right column on the PANEL ATTENDEE tab. You will be asked to confirm your action before the attendee is actually removed from the panel. Removal only effects the person's participation in this panel. Any proposal assignments or individual reviews created by this reviewer will not be altered in any way.

Panel Attendees (12)						Add	
Name	Role	Affiliations/(Associations)	Email	Phone	Assignment		
Young, Christopher	Chair	North Vermont College <i>(International Business Machines Corporation)</i>	cyoung@nvc.edu	555-555-1200	06-DISC06-0001 (S) 06-DISC06-0002 (P) 06-DISC06-0006 (S)		
Jackson, Richard	Panelist	Eastern Shore University <i>(Global Science & Technology, Inc.)</i>	ri@eastsu.edu	555-232-5633	06-DISC06-0001 (P) 06-DISC06-0002 (S) 06-DISC06-0010 (S)		
Jones, Mick	Panelist	New London State <i>(University of Hawaii)</i>	mickjones@newlondon.edu	555-555-3432			
Katsaros, Melissa	Panelist	University of Georgia	mkat@uga.edu	555-555-1234	06-DISC06-0004 (P) 06-DISC06-0010 (P)		
Schneidknopff, Lance	Panelist	<i>(none)</i>	lance@aol.edu	555-334-6654	06-DISC06-0004 (S) 06-DISC06-0006 (S)		

Click the **Delete** icon to remove an attendee

Viewing Attendee Details

Clicking the attendee NAME link within a panel will take you to the PANEL ATTENDEE DETAIL PAGE. On this page NSPIRES displays information specific to this proposal, such as an overview of the proposal including submitting PI and organization, review copies, compiled evaluations, panel information, panel evaluation, and attendees assigned to the panel. The information is divided into three sections: PROPOSAL INFORMATION, PANEL EVALUATION, and ATTENDEES.

Panel Attendee Detail Page

The screenshot shows the 'Panel Attendee Detail Page' for 'Discovery Program Panel 1 [DISC06-P1]'. The page is divided into several sections:

- Header:** 'Discovery Program Review [DISCPORV]' and 'Discovery Program Panel 1 [DISC06-P1]' with navigation tabs for 'Info', 'Proposals', 'Reviewers', and 'Panels'.
- Attendee Information:** Name 'Richard Jackson', mailing and shipping addresses, email, phone, and affiliations.
- Attendee Options:** Panel Role (Panelist), Review Assignment (Accepted), and NDA Status (Accepted).
- Reviewer Options:** Review Assignment and NDA Status.
- Proposals (5):** A table listing proposals with columns for Number, PI, Organization, Reviewer Role, Proposal Assignment, Conflict, Indiv Evaluation, and Panel Evaluation.

Callout boxes provide the following explanations:

- REVIEW NAME and [ACRONYM] are displayed here along with the primary solicitation for this review** (points to the top header).
- PANEL NAME and [ACRONYM] are displayed here** (points to the panel header).
- Attendee Name** (points to the attendee name).
- ATTENDEE INFORMATION shows contact information and any Associations/ Affiliations.** (points to the attendee information section).
- PROPOSALS section shows all panel proposals and relationship to this attendee.** (points to the proposals table).
- Click proposal NUMBER link to go to PANEL PROPOSAL DETAIL PAGE.** (points to a proposal number in the table).
- REVIEWER ROLE and PROPOSAL ASSIGNMENT show any role and status if applicable.** (points to the Reviewer Role and Proposal Assignment columns).
- CONFLICT displays Conflict of Interest status** (points to the Conflict column).
- INDIV EVALUATION shows individual evaluations if applicable.** (points to the Indiv Evaluation column).
- PANEL EVALUATION shows panel evaluation status. Click link to view the evaluation form.** (points to the Panel Evaluation column).
- These tabs allow you to access other areas of the review, including INFO, PROPOSALS, REVIEWERS, and PANELS** (points to the navigation tabs).
- These tabs allow you to access other areas of the panel, including INFO, PANEL PROPOSALS and ATTENDEES.** (points to the panel-specific tabs).
- Icon shows the current publication status for the review** (points to a checkmark icon).
- Icon shows the current publication status for the panel** (points to a checkmark icon).
- ATTENDEE OPTIONS shows the PANEL ROLE. Click Edit button to change.** (points to the Edit button).
- REVIEWER OPTIONS shows the REVIEW ASSIGNMENT and NDA STATUS.** (points to the Review Assignment and NDA Status fields).
- Click Edit icon to set attendee's conflict of interest status for this proposal.** (points to an edit icon in the proposals table).

Conflicts of Interest

Just as CONFLICTS OF INTEREST exist between individual reviewers and a proposal, they can exist between a panelist and one of the proposals assigned to a panel. When managing a panel, you can declare a conflict of interest between an attendee and a proposal, or the attendee can declare it from the external site. Also, internal users with the appropriate permissions may undeclare a conflict of interest.

CONFLICTS OF INTEREST are established between an individual reviewer and a proposal. As such, they are outside of the review context and will remain in effect even if a reviewer is no longer participating in a review.

To view or declare/undeclare a conflict of interest, click on the **Edit** icon to go to the ATTENDEE PROPOSAL ASSIGNMENT PAGE.

Conflicts of Interest

Step 1:

Proposals (5):								
Number	PI	Organization	Reviewer Role	Proposal Assignment	Conflict	Indy Evaluation	Panel Evaluation	
06-DISC06-0001	Donnelly, Tanya	University of Pennsylvania	Primary	Accepted	No	Submitted (07/15/2006)	Very Good	
06-DISC06-0002	Mann, Aimee	East Paterson University	Secondary	Accepted	No	Submitted (07/25/2006)	Good	
06-DISC06-0004	Merle, Nimish	University of Eastern Wyoming	n/a	n/a	No	n/a	Very Good	
06-DISC06-0006	Alexandra, Chloe	East Paterson University	n/a	n/a	Yes	n/a	Excellent	
06-DISC06-0010	Margaret, Ann	Faber College	Secondary	Accepted	No	Submitted (07/17/2006)	Unrated	

1. Click the **Edit** icon to edit/view the Attendee Proposal Assignment page.

Step 2:

Lori Timpaneades
06-DISC06-0004: Lunar Observation Platform

Attendee Information		Reviewer Assignment	
Mailing Address:	Eastern Michigan University 400 North Street Suite 200 Springfield, MI 10023	Role:	n/a
Shipping Address:	Eastern Michigan University 400 North Street Suite 200 Springfield, MI 10023	Assignment:	Accepted
Email:	ltimp@emu.edu	Explanation:	
Phone(s):	(0) 555-555-6700	Conflict of Interest	
Affiliations:	Eastern Michigan University	Conflict:	Yes 
Associations:	Dynamic Systems, Inc.	Explanation:	PI is my brother-in-law.

Save **Cancel**

- 2a. Use the dropdown menu to declare or undeclare a conflict.
- 2b. Enter an explanation if there is a conflict.
- 2c. Click **Save** to save changes.

Individual Evaluations

INDIVIDUAL EVALUATIONS are the product of the individual review process, one of the possible components of the review. A reviewer is given one (or more) proposal(s) to evaluate, and that reviewer writes and submits an individual, independent, evaluation of the proposal. The evaluation itself is the INDIVIDUAL EVALUATION FORM.

The INDIVIDUAL EVALUATION FORM is the form that the reviewer uses to complete the individual evaluation of a proposal. The individual evaluation form itself may contain two components: the OVERALL GRADE and the EVALUATION CRITERIA. The OVERALL GRADE is defined by the OVERALL GRADE SCORING METHOD and the EVALUATION CRITERIA is defined by the EVALUATION FORM selected in the INDIVIDUAL REVIEW SETTINGS for the review.

To access a particular reviewer's Individual Evaluation, click on one of the many Individual Evaluation status icons or links throughout the Review module.

Access Individual Evaluations

Individual Evaluations are accessible from several areas throughout the Review module by clicking on an evaluation status icon or status link.

Proposal/Panel Proposal tabs:

Primary	Secondary 1	Secondary 2	Non-Panelist
 Jackson, Richard	 Timpaneades, Lori	 Young, Christopher	 Freid, Jason  Nielsen, Jacob  Tognazzini, Bruce

Reviewer/Attendee tabs:

Name	Role	Affiliations/(Associations)	Email	Phone	Assignment
Young, Christopher	Chair	North Vermont College <i>(International Business Machines Corporation)</i>	cyoung@nvc.edu	555-555-1200	 06-DISC06-0001 (S)   06-DISC06-0002 (P)  06-DISC06-0006 (S)
Jackson, Richard	Panelist	Eastern Shore University <i>(Global Science & Technology, Inc.)</i>	rj@eastsu.edu	555-232-5633	 06-DISC06-0001 (P)   06-DISC06-0002 (S)  06-DISC06-0010 (S)

Click the **Evaluation Status icons** to go to the EVALUATION VIEW PAGE

–OR–

Proposal Information/Reviewer Information pages:

Name	Affiliations/(Associations)	Email	Phone	Role	Assignment	Conflict	Evaluation
Katsaros, Melissa	University of Georgia	mkat@uga.edu	(555) 555-3432	Primary	Accepted	No	Submitted (07/25/2008) 
Jones, Mick	New London State <i>(University of Hawaii)</i>	mickjones@newlondon.edu	(555) 555-1234	Secondary	Accepted	No	Submitted (07/27/2008) 
Schneidknopff, Lance	Fillmore University	lance@fillmore.edu	(555) 334-6654	Secondary	Accepted	No	Draft (07/22/2008) 

Click the **evaluation status links** to go to the EVALUATION VIEW PAGE.

Viewing an Individual Evaluation

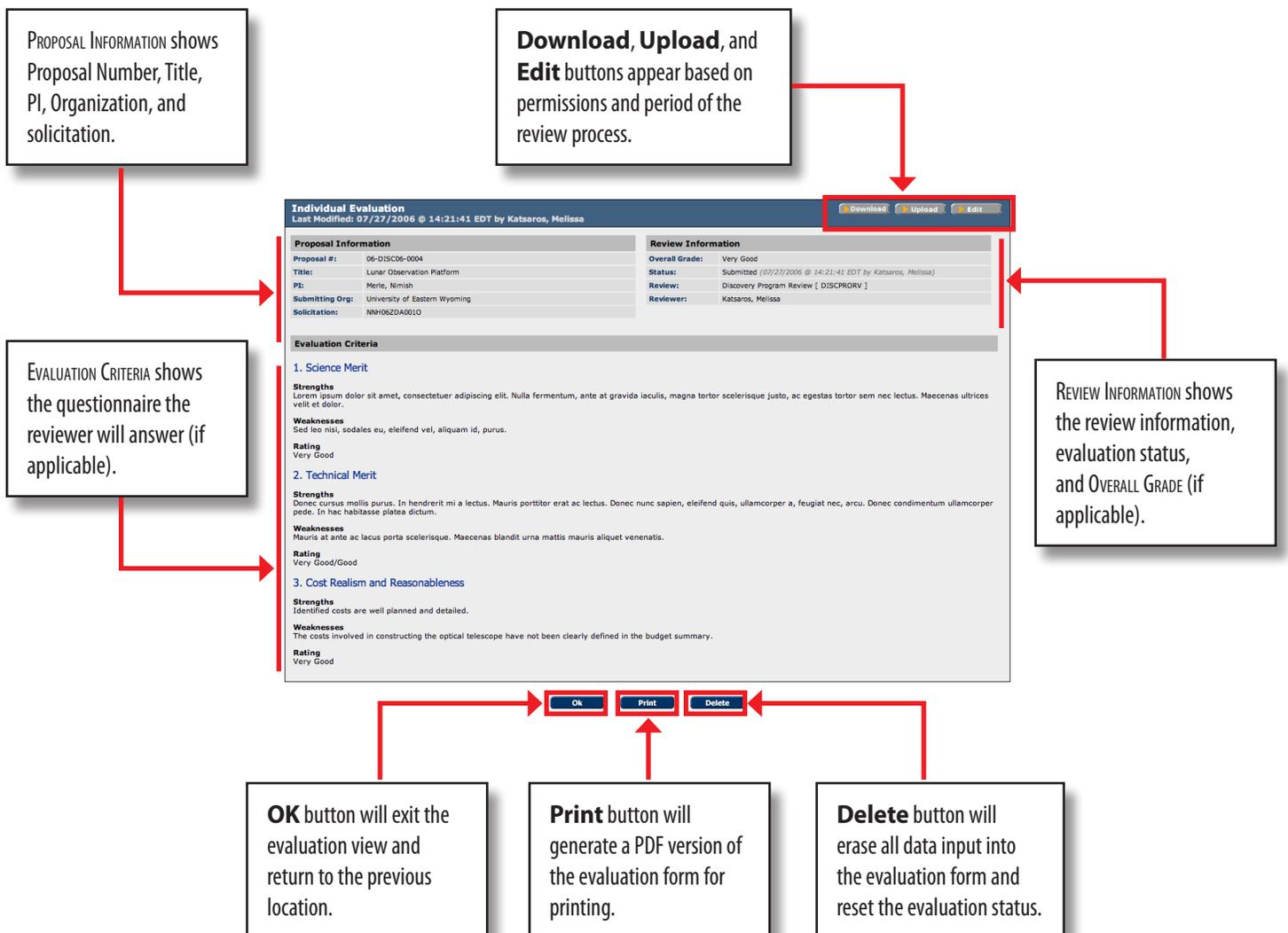
The INDIVIDUAL EVALUATION VIEW PAGE will display the INDIVIDUAL EVALUATION FORM contents as defined during the review setup. The page will consist of three sections: PROPOSAL INFORMATION, REVIEW INFORMATION, and EVALUATION CRITERIA.

PROPOSAL INFORMATION will contain basic information to help identify for which proposal the evaluation was written.

REVIEW INFORMATION will list which review the evaluation is part of, the reviewer's name, the status of the evaluation and the last time the evaluation was edited. If the INDIVIDUAL REVIEW SETTINGS have an OVERALL GRADE SCORING METHOD component defined, it will also be listed in this section as the OVERALL GRADE item.

The EVALUATION CRITERIA is a questionnaire that can contain any number of criteria for the reviewer to complete. The questionnaire is defined by the EVALUATION FORM component selected in the INDIVIDUAL REVIEW SETTINGS for the review. If this component is not part of the individual review, it will not appear as part of the INDIVIDUAL EVALUATION FORM.

Viewing Individual Evaluation



Editing an Individual Evaluation

Editing of individual evaluations is permitted in limited circumstances to allow the ability to eliminate derogatory statements and language which may impact the confidentiality of the reviewer or of other reviewers on the panel when the review is released back to the PI and submitting organization. An internal user must be granted specific permission to edit an evaluation.

To edit an evaluation, click the **Edit** button in the INDIVIDUAL EVALUATION VIEW PAGE title bar. You will then be able to edit the evaluation form as necessary and save any changes.

Creating an Individual Evaluation

Individual Evaluations may be created by an internal user on behalf of a reviewer. This action can only be performed prior to the PANEL START DATE. If there is no panel review scheduled for a proposal, this action can be performed up until the REVIEW END DATE.

To create an individual evaluation, click the **Create** button in the INDIVIDUAL EVALUATION VIEW PAGE title bar where the **Edit** button normally appears. A blank edit screen will appear for you to enter the information on and then save the form.

Downloading an Individual Evaluation

NSPIRES offers the ability to create a PDF form version of the individual evaluation for working offline and then uploading the evaluation back into NSPIRES. These forms are generated by NSPIRES to enable users of Adobe Reader software to type and save information directly into the PDF form. Forms are generated for each reviewer and should not be shared between reviewers.

To download a form, click the **Download** button on the INDIVIDUAL EVALUATION VIEW PAGE then save the generated PDF file. Use Adobe Reader software to fill out and save the form.

Editing an Evaluation

1. Enter text and make selections as necessary.
2. Click **Save** when finished.

Click the **Download** button to create an editable PDF version of the evaluation form.

Uploading an Individual Evaluation

After you or an external reviewer has downloaded and completed the PDF evaluation form, the form may be uploaded to NSPIRES.

1. Click the **Upload** button.



The screenshot shows the top of the 'Individual Evaluation' form. The 'Upload' button in the top right corner is highlighted with a red box. Below the header, there are sections for 'Proposal Information', 'Review Information', and 'Evaluation Criteria'. The 'Proposal Information' section includes fields for Proposal #, Title, PI, Submitting Org, and Solicitation. The 'Review Information' section includes Overall Grade, Status, Review, and Reviewer. The 'Evaluation Criteria' section is currently empty.

Upload Individual Evaluation Form

WARNING! Uploading a form will replace any existing form information with the new information in the uploaded document.

2. Click the **Browse** button to select the form file to upload.
3. Click the **Continue** button.



The screenshot shows the 'Upload Evaluation Form' dialog box. It has a 'Select File:' field containing the path 'c:\Documents\evalform.pdf'. The 'Browse' button is highlighted with a red box. Below the dialog box, the 'Continue' and 'Cancel' buttons are shown, with the 'Continue' button highlighted by a red arrow.

Upload Individual Evaluation Form

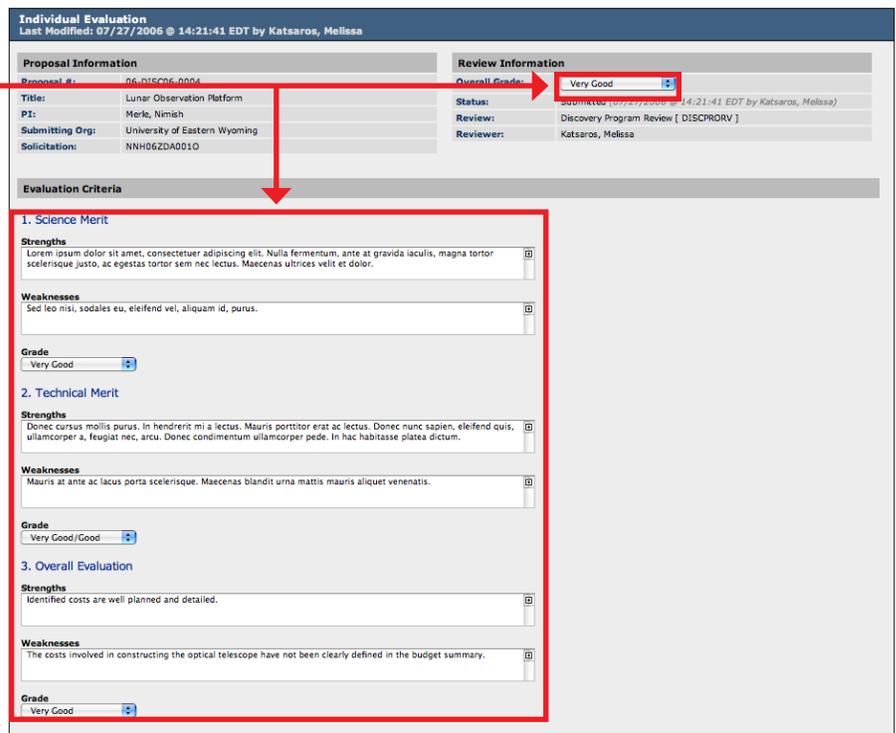
NOTE: Document upload was successful. Any previous information will be replaced with the data in the uploaded form.

4. If form uploads correctly, click **Continue** button.



The screenshot shows the 'Continue' and 'Cancel' buttons from the previous step. The 'Continue' button is highlighted with a red box and a red arrow pointing to it.

5. Verify/edit form data.



The screenshot shows the 'Individual Evaluation' form with the 'Evaluation Criteria' section expanded. It contains three sections: '1. Science Merit', '2. Technical Merit', and '3. Overall Evaluation'. Each section has 'Strengths' and 'Weaknesses' text areas and a 'Grade' dropdown menu. The 'Overall Grade' dropdown in the 'Review Information' section is highlighted with a red box. The 'Continue' button from the previous step is also visible at the bottom of the form.

6. Click **Save** to save uploaded form.



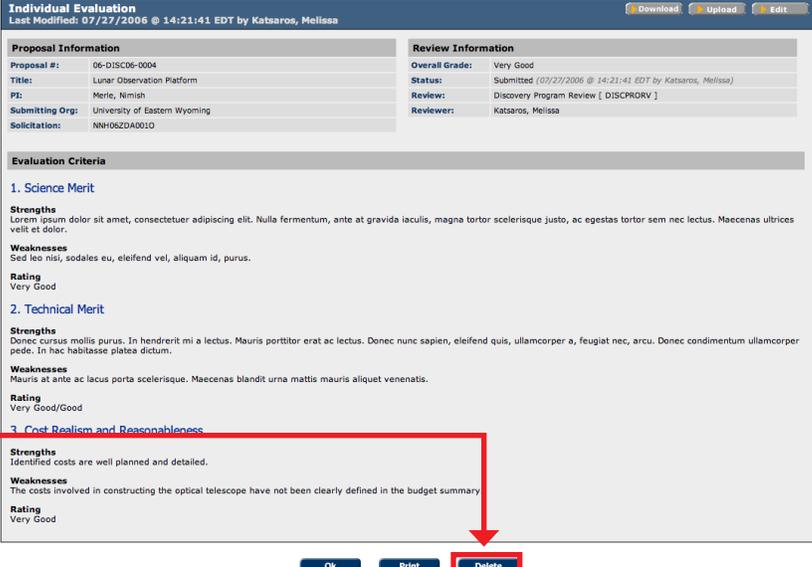
The screenshot shows the 'Save' and 'Cancel' buttons at the bottom of the form. The 'Save' button is highlighted with a red box and a red arrow pointing to it.

Deleting an Individual Evaluation

Internal users will have the ability to delete an individual evaluation prior to the PANEL END DATE. If there is no panel assigned to the proposal, then the evaluation may be deleted up until the REVIEW END DATE. Deleting an individual evaluation will remove all records of the evaluation form and reset the evaluation status to *None*. This action cannot be undone.

To delete an individual evaluation, click the **Delete** button at the bottom of the INDIVIDUAL EVALUATION VIEW PAGE. You must then confirm the action before the evaluation is deleted.

Click **Delete** button to delete an evaluation.

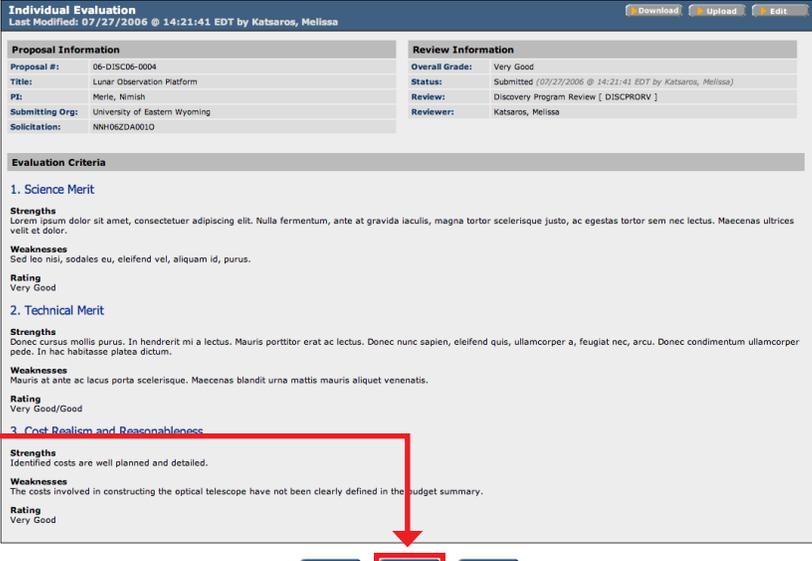


The screenshot shows the 'Individual Evaluation' form. At the top right, there are buttons for 'Download', 'Upload', and 'Edit'. The form is divided into several sections: 'Proposal Information', 'Review Information', and 'Evaluation Criteria'. The 'Evaluation Criteria' section is expanded to show three criteria: '1. Science Merit', '2. Technical Merit', and '3. Cost Realism and Reasonableness'. Each criterion has 'Strengths', 'Weaknesses', and 'Rating' fields. At the bottom of the form, there are three buttons: 'Ok', 'Print', and 'Delete'. A red arrow points from the text 'Click Delete button to delete an evaluation.' to the 'Delete' button.

Printing an Individual Evaluation

Printing an INDIVIDUAL EVALUATION FORM will make NSPIRES generate a PDF file suitable for printing. This PDF will not be editable. You may print an evaluation at anytime, even after a review ends. Click the **Print** button at the bottom of the INDIVIDUAL EVALUATION VIEW PAGE to generate the PDF.

Click **Print** button to generate a PDF file for printing.



The screenshot shows the 'Individual Evaluation' form, identical to the one above. At the bottom of the form, there are three buttons: 'Ok', 'Print', and 'Delete'. A red arrow points from the text 'Click Print button to generate a PDF file for printing.' to the 'Print' button.

Panel Evaluations

PANEL EVALUATIONS are the product of the panel review process, one of the possible components of the review. A group of panelists is invited to a panel to discuss proposals and provide recommendations to NASA. The panelists evaluate and discuss the proposals together and generate a panel evaluation for each proposal. The panel review may not represent a consensus but does represent the majority view of the proposal. The panel evaluation is typically written by the panelist that was assigned as the primary reviewer for that proposal. The evaluation itself is the PANEL EVALUATION FORM.

The PANEL EVALUATION FORM is the form that the panel uses to complete the panel evaluation. The panel evaluation form itself may contain two components: the OVERALL GRADE and the EVALUATION CRITERIA. The OVERALL GRADE is defined by the OVERALL GRADE SCORING METHOD and the EVALUATION CRITERIA is defined by the EVALUATION FORM selected in the PANEL REVIEW SETTINGS for the review.

To access a particular proposal's PANEL EVALUATION, click on one of the many Panel Evaluation status icons/links throughout the Review module.

Access Individual Evaluations

Panel Evaluations are accessible from several areas throughout the Review module by clicking on an evaluation status icon or Overall Grade link.

Proposal/Panel Proposal tabs:

Click the status icon or grade link to view panel evaluation form.



Panel Proposal Information Page:



Click the **View** button to view panel evaluation form.

The linked text, if any, indicates the Overall Grade selected for the proposal.
The icon indicates the evaluation form status.

-  Submitted
-  Draft
-  None

Viewing a Panel Evaluation

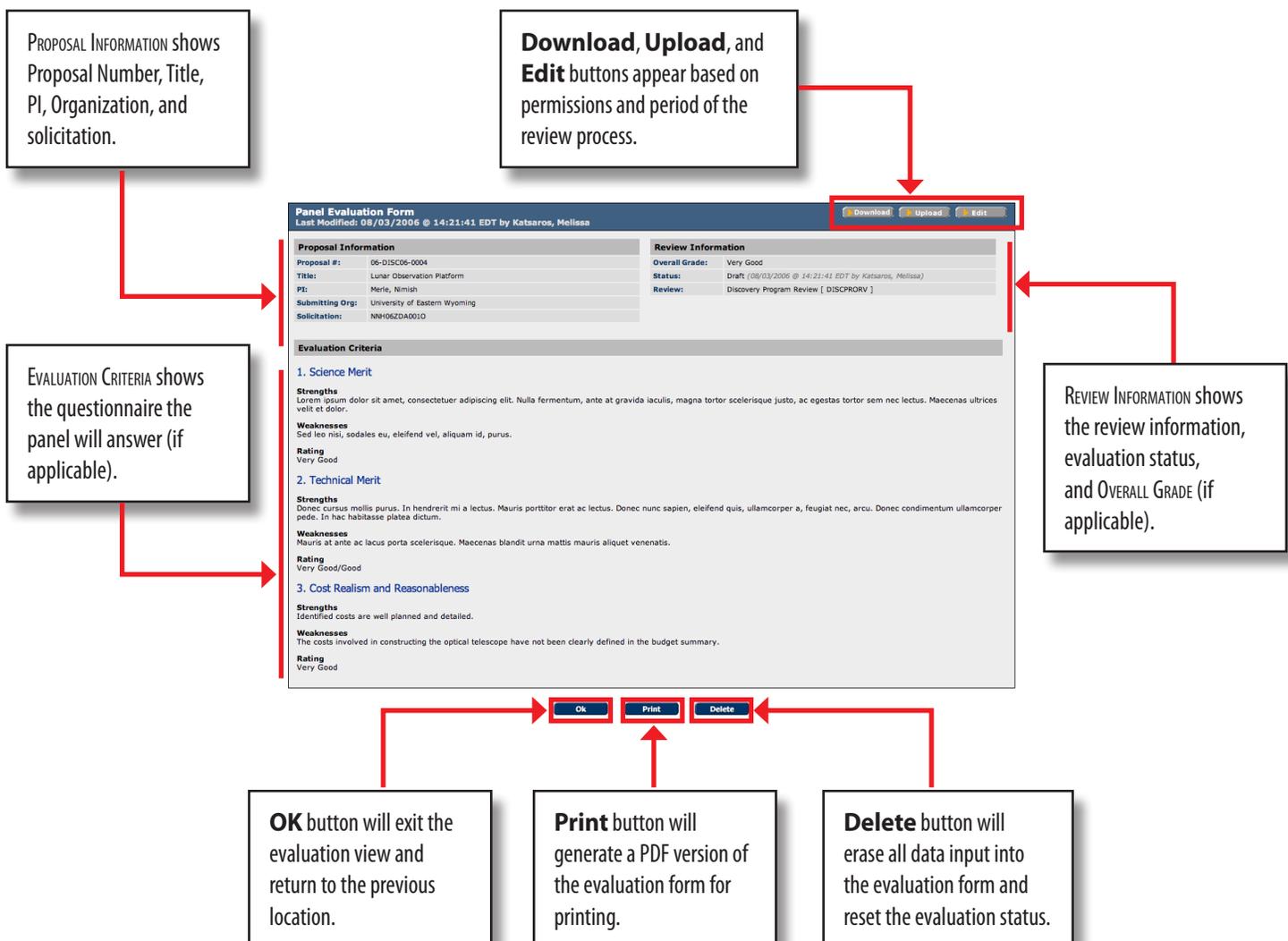
The PANEL EVALUATION VIEW PAGE will display the evaluation form contents as defined during the review setup. The page will consist of three sections: PROPOSAL INFORMATION, REVIEW INFORMATION, and EVALUATION CRITERIA.

PROPOSAL INFORMATION will contain contain basic information to help identify for which proposal the evaluation was written.

REVIEW INFORMATION will list which review the evaluation is part of, the status of the evaluation and the last time the evaluation was edited. If the PANEL REVIEW SETTINGS have an OVERALL GRADE SCORING METHOD component defined, it will also be listed in this section as the OVERALL GRADE item.

The EVALUATION CRITERIA is questionnaire that can contain any number of criteria for the reviewer to complete. The questionnaire is defined by the EVALUATION FORM selected in the PANEL REVIEW SETTINGS. If this component is not part of the Panel Review, it will not appear as part of the PANEL EVALUATION FORM.

Viewing Panel Evaluation



Editing a Panel Evaluation

Editing of panel evaluations is permitted in limited circumstances to allow the ability to eliminate derogatory statements and language which may impact the confidentiality of the reviewer or of other reviewers on the panel when the review is released back to the PI and submitting organization. An internal user must be granted specific permission to edit an evaluation.

To edit an evaluation, click the **Edit** button in the PANEL EVALUATION VIEW PAGE title bar. You will then be able to edit the evaluation form as necessary and save any changes.

Creating a Panel Evaluation

Panel Evaluations may be created by an internal user on behalf of the panel. This action can only be performed after the PANEL START DATE. If there is no panel review scheduled for a proposal, this action cannot be performed.

To create an panel evaluation, click the **Create** button in the PANEL EVALUATION VIEW PAGE title bar where the **Edit** button normally appears. A blank edit screen will appear for you to enter the information on and then save the form.

Downloading a Panel Evaluation

NSPIRES offers the ability to create a PDF form version of the panel evaluation for working offline and then uploading the evaluation back into NSPIRES. These forms are generated by NSPIRES to enable users of Adobe Reader software to type and save information directly into the PDF form. Forms are generated for each reviewer and should not be shared between reviewers.

To download a form, click the **Download** button on the PANEL EVALUATION VIEW PAGE then save the generated PDF file. Use Adobe Reader software to fill out and save the form.

Editing an Panel Evaluation

Save **Cancel**

1. Enter text and make selections as necessary.
2. Click **Save** when finished.

Download **Upload** **Edit**

Click the **Download** button to create a PDF form version of the evaluation form.

Uploading a Panel Evaluation

After you or an external reviewer has downloaded and completed the PDF evaluation form, the form may be uploaded to NSPIRES.

1. Click the **Upload** button.

Panel Evaluation Form
Last Modified: 08/03/2006 @ 14:21:41 EDT by Katsaros, Melissa

Proposal Information	Review Information
Proposal #: 06-DISC06-0004	Overall Grade: Very Good
Title: Lunar Observation Platform	Status: Draft (08/03/2006 @ 14:21:41 EDT by Katsaros, Melissa)
PI: Merle, Nimish	Review: Discovery Program Review [DISCPORV]
Submitting Org: University of Eastern Wyoming	
Solicitation: NNH06ZDA0010	

1. Science Merit

Edit Panel Evaluation

WARNING! Uploading a form will replace any existing form information with the new information in the uploaded document.

2. Click the **Browse** button to select the form file to upload.
3. Click the **Continue** button.

Upload Evaluation Form

Select File: c:\Documents\evalform.pdf **Browse**

Continue **Cancel**

Edit Panel Evaluation

NOTE: Document upload was successful. Any previous information will be replaced with the data in the uploaded form.

4. If form uploads correctly, click **Continue** button.

Continue **Cancel**

5. Verify/edit form data.

Panel Evaluation Form
Last Modified: 08/03/2006 @ 14:21:41 EDT by Katsaros, Melissa

Proposal Information	Evaluation Information
Proposal #: 06-DISC06-0004	Overall Grade: Very Good
Title: Lunar Observation Platform	Status: Draft (08/03/2006 @ 14:21:41 EDT by Katsaros, Melissa)
PI: Merle, Nimish	Review: Discovery Program Review [DISCPORV]
Submitting Org: University of Eastern Wyoming	
Solicitation: NNH06ZDA0010	

1. Science Merit

Strengths
Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla fermentum, ante at gravida laculis, magna tortor scelerisque justo, ac egestas tortor sem nec lectus. Maecenas ultrices velit et dolor.

Weaknesses
Sed leo nisi, sodales eu, eleifend vel, aliquam id, purus.

Grade: **Very Good**

2. Technical Merit

Strengths
Donec cursus mollis purus. In hendrerit mi a lectus. Mauris porttitor erat ac lectus. Donec nunc sapien, eleifend quis, ullamcorper a, feugiat nec, arcu. Donec condimentum ullamcorper pede. In hac habitasse platea dictum.

Weaknesses
Mauris at ante ac lacus porta scelerisque. Maecenas blandit urna mattis mauris aliquet venenatis.

Grade: **Very Good/Good**

3. Cost Realism and Reasonableness

Strengths
Identified costs are well planned and detailed.

Weaknesses
The costs involved in constructing the optical telescope have not been clearly defined in the budget summary.

Grade: **Very Good**

6. Click **Save** to save uploaded form.

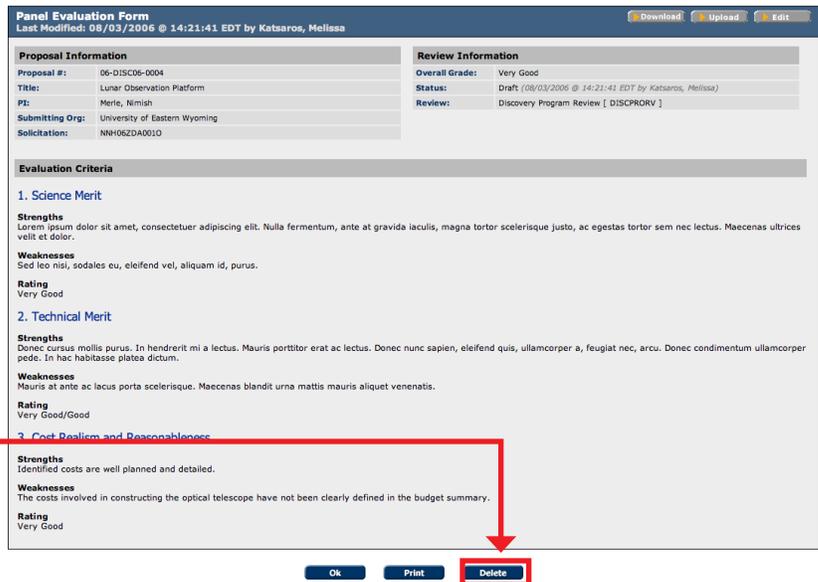
Save **Cancel**

Deleting a Panel Evaluation

Internal users will have the ability to delete a draft panel evaluation. Deleting a panel evaluation will remove all records of the evaluation form and reset the evaluation status to *None*. This action cannot be undone.

To delete a panel evaluation, click the **Delete** button at the bottom of the PANEL EVALUATION VIEW PAGE. You must then confirm the action before the evaluation is deleted.

Click **Delete** button to delete an evaluation.

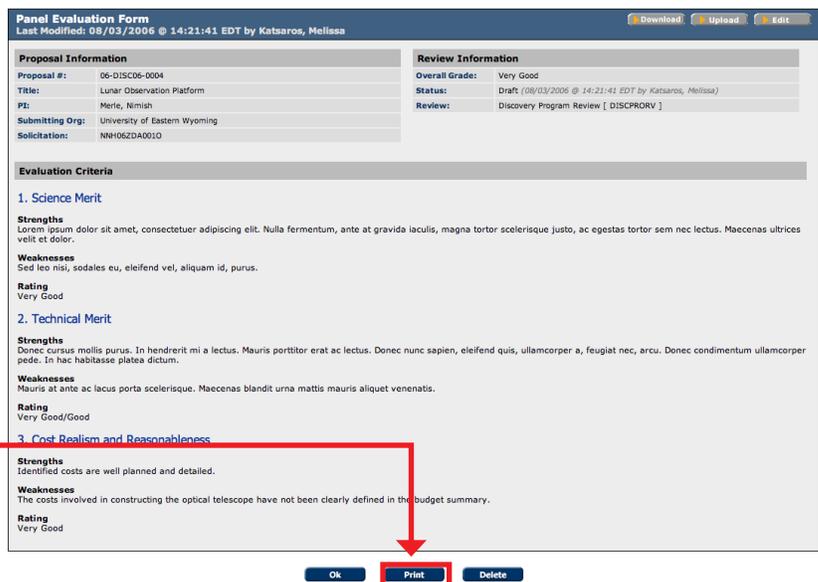


The screenshot shows the 'Panel Evaluation Form' interface. At the top, it displays 'Last Modified: 08/03/2006 @ 14:21:41 EDT by Katsaros, Melissa' and buttons for 'Download', 'Upload', and 'Edit'. The form is divided into three main sections: 'Proposal Information', 'Review Information', and 'Evaluation Criteria'. The 'Proposal Information' section includes fields for Proposal # (06-DISC06-0004), Title (Lunar Observation Platform), PI (Merle, Nimish), Submitting Org (University of Eastern Wyoming), and Solicitation (NNH06ZDA0010). The 'Review Information' section shows Overall Grade (Very Good), Status (Draft (08/03/2006 @ 14:21:41 EDT by Katsaros, Melissa)), and Review (Discovery Program Review [DISCRORV]). The 'Evaluation Criteria' section is divided into three numbered items: 1. Science Merit, 2. Technical Merit, and 3. Cost Realism and Reasonableness. Each item has a 'Strengths' section with placeholder text, a 'Weaknesses' section with placeholder text, and a 'Rating' section. At the bottom of the form, there are three buttons: 'Ok', 'Print', and 'Delete'. The 'Delete' button is highlighted with a red box, and a red arrow points from the text 'Click Delete button to delete an evaluation.' to it.

Printing a Panel Evaluation

Printing a PANEL EVALUATION FORM will make NSPIRES generate a PDF file suitable for printing. This PDF will not be editable. You may print an evaluation at anytime, even after a review ends. Click the **Print** button at the bottom of the PANEL EVALUATION VIEW PAGE to generate the PDF.

Click **Print** button to generate a PDF file for printing.



The screenshot shows the 'Panel Evaluation Form' interface, identical to the one above. At the bottom of the form, there are three buttons: 'Ok', 'Print', and 'Delete'. The 'Print' button is highlighted with a red box, and a red arrow points from the text 'Click Print button to generate a PDF file for printing.' to it.