

Application Review Module (ARM)

HRSA: Reviewer Manual

September 2022



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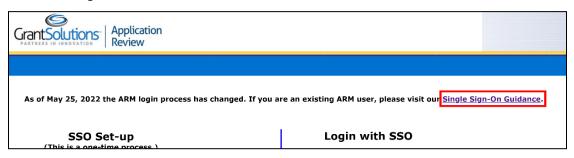


Chapter 1: Logging into ARM

Overview

This section covers logging into the Grant Solutions Application Reviewer Module (ARM) system. Users will only be able to access ARM once the Session Administrator opens the session. There are two login processes, one for Non-Federal User and one for Federal Users.

Note: Existing Non-Federal Users will need to complete the Single Sign-On Authentication. Guidance can be found on the ARM Home Page.



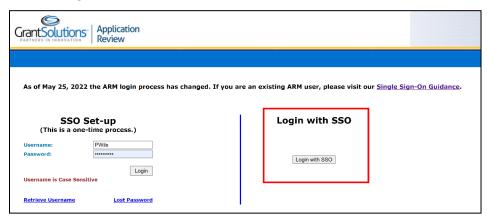
1. Logging into ARM (Non-Federal Users)

New users receive their login information from no_reply@grantsolutions.gov, and will include the link to ARM, their username, and a temporary password. Upon logging in for the first time, you are required to change your **temporary password** and are required to set up **Multifactor Authentication**.

Returning Users: As a returning ARM User, you will be able to use the same username and password to access the system.

To log into the GrantSolutions Application Review Module:

1. Click the **Login with SSO** button.





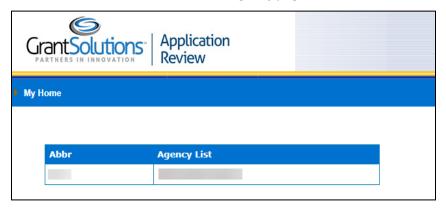
2. Enter your **username** and **password** then click **Submit** to log in.



- 3. Complete Multifactor Authentication.
- 4. On the **GrantSolutions dashboard**, click the **ARM** link from the **ARM dropdown men**u.



5. You will now have reached the **ARM Agency** page.





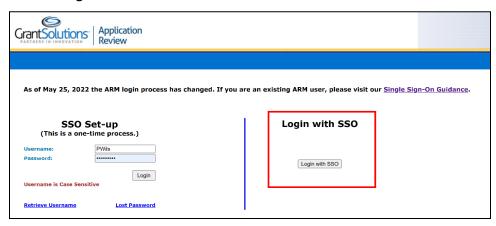
2. Logging into ARM (Federal Users)

Federal users are required to use their **Personal Identity Verification (PIV) ID** to access ARM via **login.gov** or **AMS for Grantors** . **Note:** Federal users cannot access **ARM** using a username and password.

New Federal Users will receive confirmation that their GrantSolutions ARM account has been created from no_reply@grantsolutions.gov. If accessing GrantSolutions for the first time, you will be prompted to link your login.gov account to your GrantSolutions account. **Note:** For new users, access to ARM is only provided once the Session has been opened.

To log into the GrantSolutions Application Review Module:

1. Click the Login with SSO button.



2. From the **GrantSolutions Login** screen, click the **Login.gov** button or click the **AMS for Grantors** button (HHS Federal Users only).

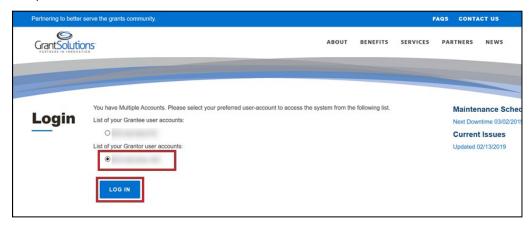


3. If using Login.gov, click the Sign in with your government employee ID link on the Login.gov Sign in screen.

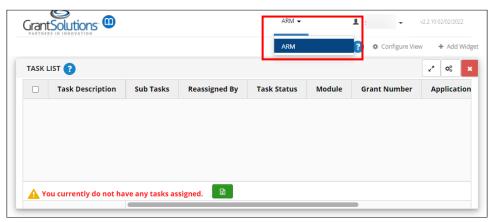




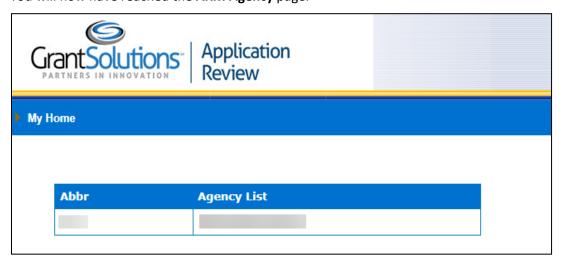
4. Complete the process of logging in using your PIV Card. **Note:** If you have multiple accounts associated to the PIV ID, the **GrantSolutions Login** screen appears. The PIV ID may be associated to both Grantor and Recipient accounts. Select the radio button for the Grantor account and click the **LOG IN** button.



5. On the GrantSolutions dashboard, click the **ARM** link from the **ARM dropdown** menu.



6. You will now have reached the **ARM Agency** page.





3. Forgot Username or Password (Non-Federal Only)

Resetting your password and retrieving your username must be done from the GrantSolutions Login Page. **Note:** You are not able to reset your password directly from the ARM Homepage.

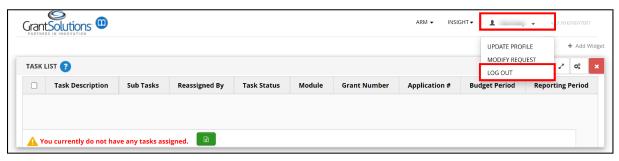


4. Closing ARM and Logging off

1. To close ARM and return to the GrantSolutions Dashboard, users will click the close link on the top right corner of the Agency Page.



2. To log out of ARM, click the Log Out Link from the GrantSolutions Dashboard.





Chapter 2: Navigating to your Session, Panel, and Applications

Overview

This section covers navigating to your session, your panel, the application list screen, and downloading the application. This section also provides more information about the Application list screen.

Accessing your session and panel(s)

After login into the ARM System, you will reach the Agency Home screen that lists the agency or agencies for which you are serving as reviewer. If you have served or are currently serving in a monitor role but are accessing ARM as a Reviewer, you must click on the Panelist hyperlink before proceeding.

1. Click the Agency Name.

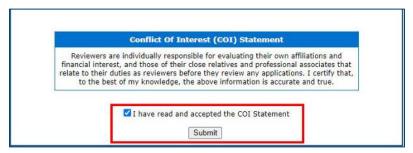


 Click the hyperlinked Session Name to reach the panel list page. Note: If your session has a program support website with relevant information concerning your review, the hyperlink will be in the Program Support Site column. Click the <u>Go to Site</u> hyperlink to open it.





3. After clicking on the hyperlinked **Session Name**, you may see a **Conflict of Interest** (COI) **Statement** that you must read and accept before accessing the session. Once you have read the COI Statement, check the box indicating that you have read and accepted the statement and then click the **Submit** button to reach the **Panel List Screen**. If you do not see this screen, please skip to the Accessing the Application List Screen



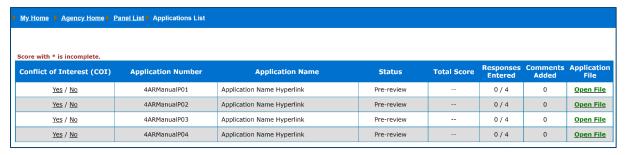
Note: You will not be able to advance to the review if you do not accept the COI statement.

2. Accessing the Application List Screen

1. From the Panel list Screen, click **the hyperlinked** panel number to reach the application list screen.



2. After clicking the hyperlinked panel number, you will now see the Application List screen.





3. Application List Screen Overview

The **Application List screen** lists the application assigned to your panel and provides you with an overview of the progress you have made in evaluating each application.

My Home ▶ Agency Home ▶ Panel List ▶ Applications List							
Score with * is incomplete. Conflict of Interest (COI)	Application Number	Application Name	Status	Total Score	Responses Entered	Comments Added	Application File
<u>Yes</u> / <u>No</u>	4ARManualP01	Application Name Hyperlink	Pre-review		0 / 4	0	Open File
<u>Yes</u> / <u>No</u>	4ARManualP02	Application Name Hyperlink	Pre-review		0 / 4	0	Open File
Yes / No	4ARManualP03	Application Name Hyperlink	Pre-review		0 / 4	0	Open File
<u>Yes</u> / <u>No</u>	4ARManualP04	Application Name Hyperlink	Pre-review		0/4	0	Open File

- 1. Conflict of Interest (COI) Viewable only if turned on by the Agency Admin
- 2. Application Number Column
- 3. Application Name Column
- 4. Status Column (See Appendix B: Application Status Definitions for definitions of each status).
- 5. **Total Score Column**: The total score you have entered for that application. **Note**: Applications that have not been scored will contain "--" in this column. An asterisk next to the score indicates that you have not entered a score for all scoring criteria.
- 6. **Responses Entered Column**: This indicates the number of criteria that you have entered a score for out of the total number of scoring criteria.
- 7. **Comments Added Column**: The total number of comments you have added to that application, across all criteria.
- 8. **Application File Column**: Click the green **Open File** hyperlink to open the application file in a new tab or window. (This is optional and may not be available in all reviews.)



4. Downloading the Application

Depending on the agency you are reviewing for, the application file will be either a PDF document or a zip file. To access the application:

- 1. Click on the green **Open File** hyperlink in the Application Column. Depending on the browser you are using, you will be prompted to save/download the application to your computer.
- 2. Repeat the process for each application assigned to your panel.

Home ▶ Agency Home ▶ Panel List ▶ Applications List							
Score with * is incomplete. Conflict of Interest Application Application Name Status Total Responses Comments Application							
Number	Аррисаціон Name	Status	Score	Entered	Added	File	
4ARManualP01	Application Name Hyperlink	Pre-review		0 / 4	0	<u>Open File</u>	
4ARManualP02	Application Name Hyperlink	Pre-review		0 / 4	0	Open File	
4ARManualP03	Application Name Hyperlink	Pre-review		0 / 4	0	<u>Open File</u>	
4ARManualP04	Application Name Hyperlink	Pre-review		0 / 4	0	Open File	
	incomplete. Application Number 4ARManualP01 4ARManualP02 4ARManualP03	incomplete. Application Name 4ARManualP01 Application Name Hyperlink 4ARManualP02 Application Name Hyperlink 4ARManualP03 Application Name Hyperlink	incomplete. Application Name Status 4ARManualP01 Application Name Hyperlink Pre-review 4ARManualP02 Application Name Hyperlink Pre-review 4ARManualP03 Application Name Hyperlink Pre-review	incomplete. Application Name Status Total Score 4ARManualP01 Application Name Hyperlink Pre-review 4ARManualP02 Application Name Hyperlink Pre-review 4ARManualP03 Application Name Hyperlink Pre-review	incomplete. Application Name Status Total Score Entered 4ARManualP01 Application Name Hyperlink Pre-review 0 / 4 4ARManualP02 Application Name Hyperlink Pre-review 0 / 4 4ARManualP03 Application Name Hyperlink Pre-review 0 / 4	incomplete. Application Number Application Name Status Total Score Entered Added 4ARManualP01 Application Name Hyperlink Pre-review 0 / 4 0 4ARManualP02 Application Name Hyperlink Pre-review 0 / 4 0 4ARManualP03 Application Name Hyperlink Pre-review 0 / 4 0	



Chapter 3: Starting your Review

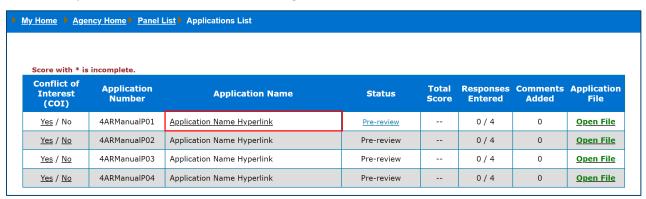
Overview

This section covers starting your review, how to access the evaluation screen, and provides information about the Evaluations Screen.

1. How to access the Evaluation Screen

To access the evaluation screen:

1. Click on the hyperlinked <u>Application Name</u>. If the Application Name is **not hyperlinked**, then you will need to complete the Conflict of Interest first to gain access. (See the <u>Conflict of Interest</u> section)

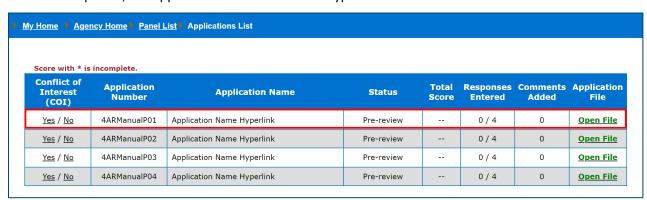


2. Conflict of Interest (COI)

How to complete the Conflict of interest

If you see a **Conflict of Interest (COI)** column to the left of the Application List Screen, you must review each application separately and determine whether you have a Conflict of Interest.

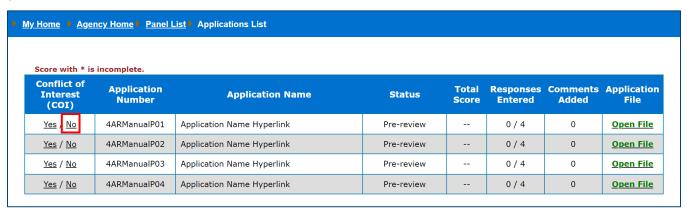
Once you have reviewed the application for a potential COI, you must then input your determination into ARM. Until this is completed, the application name will not be Hyperlinked.





What to do if I have no Conflict?

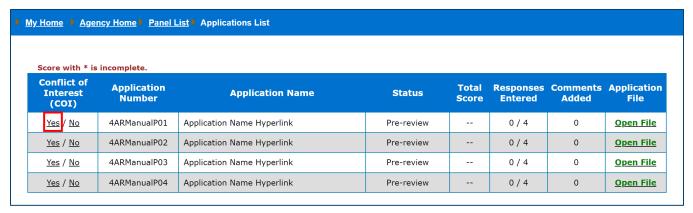
1. If you do not have a conflict of interest, click the hyperlinked **No.** The application name will then become active, and you can now click to access the evaluation screen.



Note: <u>Yes</u> will remain available in the case, you determine you have a COI during the commenting and scoring period of the review.

What to do if I have Conflict?

1. If you do have a conflict with an application, click **Yes**.



2. You will receive a confirmation pop-up box confirming that you understand your access to this application will be removed. Click **OK** to confirm that you have a conflict of interest.





3. The application will then be removed from the application list screening once you click **OK**.

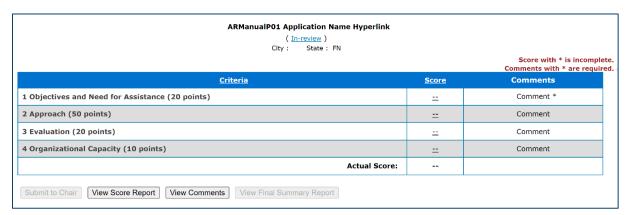
Note: Additionally, selecting <u>Yes</u> will automatically send an email notification to a pre-determined session administrator. However, it is your responsibility to follow up with your review point of contact.

If you accidentally select <u>Yes</u> or if it is determined that a COI does not exist, your access to this application can be restored.

3. Understanding the Evaluation Screen

The Evaluation Screen is the main hub for the application you are reviewing. It is from this screen that you will see the list of review criteria, enter your scores and comments, view your entries, and submit your evaluations.

Reviewer Evaluation Screen



Radio Buttons Explained



- 1. **Submit to Chair**: This button allows you to submit your evaluation to the SSO. This button becomes active once all scores have been entered, the application budget data section has been completed, the priority point questions section has been completed, the preference questions section has been completed, and, if required, comments.
- 2. **View Score Report** This report lists all scoring and non-scoring criteria with your scores (and responses to any non-scoring criteria) listed.
- 3. **View Comments**: This Report lists all your comments. The comments are listed by criterion, separated into Strength comments first, followed by Weakness comments.
- 4. **View My Entries**: This button allows you to view all entries for the application budget data section, the priority point questions section, the preference questions section.
- 5. **View Final Summary Report**: This report allows you to view the Final Summary Report created by the panel SSO and becomes active only once the application is in **Submitted** Status.



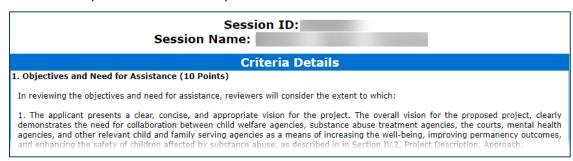
4. Accessing Review Criteria Descriptions

The Evaluation Screen only displays the main criteria headers. A full breakdown of the criteria along with detailed descriptions can be accessed from the Evaluation Screen.

1. Click the Criteria column header hyperlink.



2. The full descriptions of criteria will open in a new tab or window.

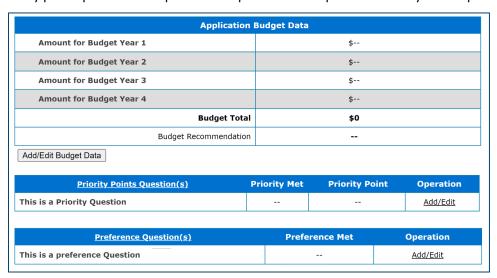


5. Model 4 Specific: Additional Sections

In addition to the review criteria section, there may be additional sections to complete which include the following:

- The application budget data section.
- The priority point questions section.
- The preference questions section.

Note: Priority point questions and preference questions are optional and may not be present in your review.





5.1 Priority Points Question(s) Description Screen

View full Descriptions of Priority Points: If the review was set up with Priority Points and detailed descriptions were added, you may view them by clicking on the hyperlinked header Priority Points Question(s).

Priority Points Question(s)	Priority Met	Priority Point	Operation
This is a Priority Question			Add/Edit

5.2 Preference Question(s) Description Screen

View full Descriptions of Preference Questions (s): If the review was set up with Preference Questions and detailed descriptions were added, you may view them by clicking on the hyperlinked header Preference Question(s).

Preference Question(s)		Preference Met	Operation
	This is a preference Question		Add/Edit
		•	



Chapter 4: Entering Scores

Overview

This section covers entering scores into ARM. There are two ways to enter scores in ARM, entering them by individual criterion or entering them for all criteria from one screen. This section applies to all ARM Models.

When evaluating an application there are a few factors to keep in consideration:

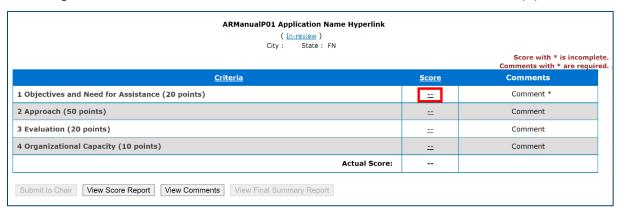
- 1. As a Reviewer, you can only see your scores and comments.
- 2. You must enter a score before you can enter a comment.
- 3. You must enter a score for each sub-criterion (if applicable to your review)
- 4. ARM automatically totals your overall evaluation score for you as you enter your criterion scores.
- 5. You can edit all scores until you submit your evaluation to the SSO.
- 6. You cannot submit your evaluation to the SSO unless you have entered scores for all scoring criteria.
- 7. Scores can only be changed if the application is in an In-Review or Returned by Chair Status.

1. How to enter Scores

There are two methods of entering your scores.

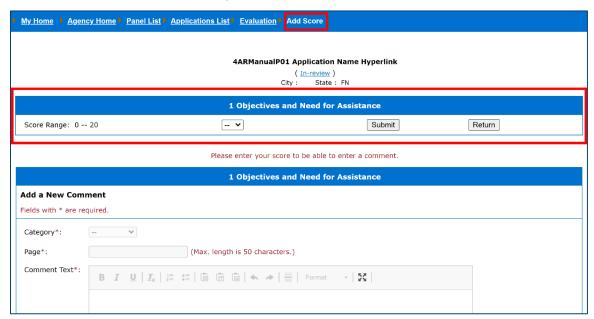
1.1 Entering Scores by Individual Criterion

1. On the **Evaluation Screen**, click the double dash (--) in the Score column next to the criterion you are evaluating. **Note**: Before a score is entered, the Score column will show a double dash (--).

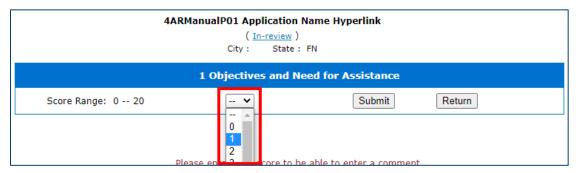




2. You will now see the **Add Score Screen** with a scoring section and a comment section. **Note**: The comments section will be inactive if you have not entered a score.

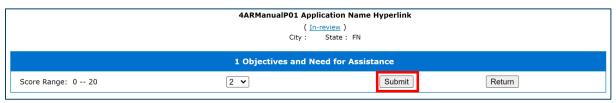


3. To add your score, click the dropdown menu and select your desired score.

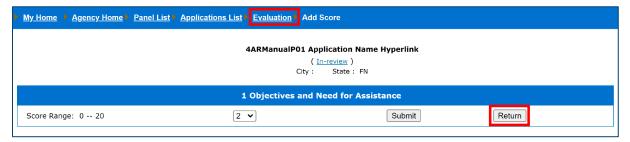




Click the Submit button to add the score to your evaluation. Note: Once you submit your score, the
comment section below will become active. You can now proceed to enter comments (<u>Chapter 5: Adding</u>
<u>Comments</u>).



5. If would like to return to the Evaluation Screen, click the Return Button or the breadcrumb trail.



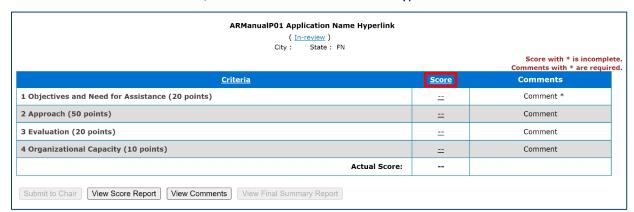
Note: A score can be changed at any point during the reviewer process if the application is in "**In-Review**" or "**Returned by Chair**" Status. See section below for more information on how to edit your scores.

Repeat the steps above for the remaining criteria.

1.2 Entering scores for all criteria from one screen

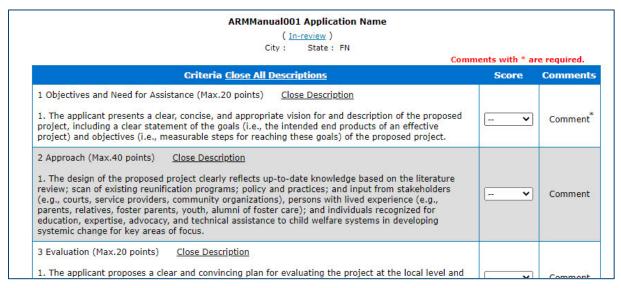
You have the option to enter all scores on one comprehensive scoring screen.

1. To access the Add Scores Screen, click the Score column header hyperlink on the Evaluation screen.

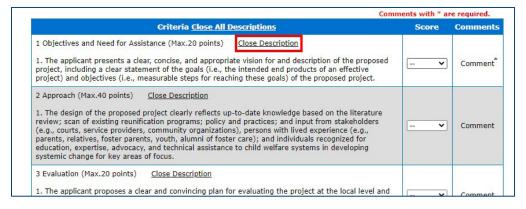




2. You will now see the full **Add Scores Screen** that lists all review criteria. **Note**: The word comment is not an active hyperlink as you must first enter a score.

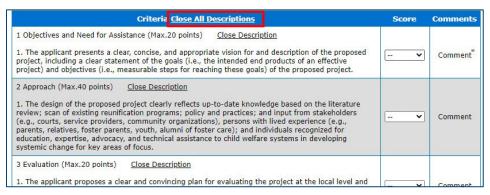


- 3. On this screen, you will automatically view the full descriptions of criteria with options of closing the descriptions for all criteria or by individual criterion.
 - a. Click the Close Description hyperlink next to an individual criterion to hide the description of that criterion. Note: You can regain access to the full Criterion by clicking the Show Description hyperlink.

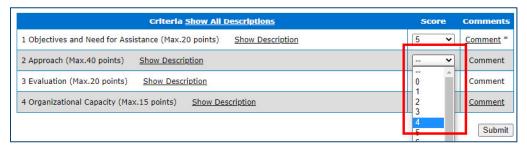




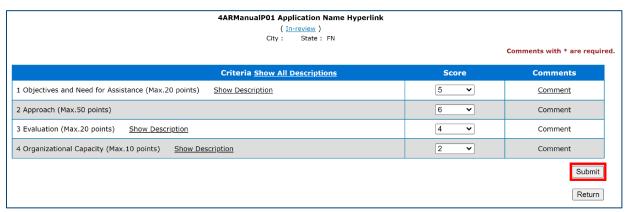
b. Click the Close All Descriptions hyperlink next to the Criteria column header to hide all criteria descriptions. Note: You can regain access to the full Criterion by clicking the Show All Descriptions hyperlink.



4. Click the dropdown menus next to the criterion and select your desired scores for each.



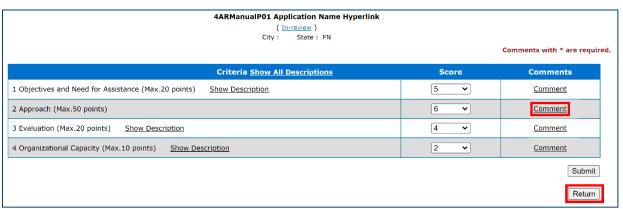
5. Click to the **Submit** button to add the selected scores to your evaluation.



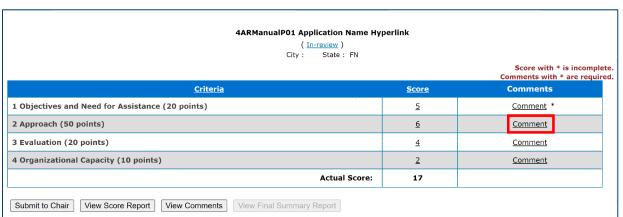
The Score column will now display the scores you submitted, and the **comment** hyperlink will become active. **Note**: You must enter comments on an Individual criterion basis.



6. To return to the evaluation screen, click the **Return Button** (You can click the **Return Button** without adding scores.)



Once back on the **Evaluation Screen**, you will now see that the double dash hyperlink (--) will be replaced by the score you entered and that the **Comment** hyperlink is now active.

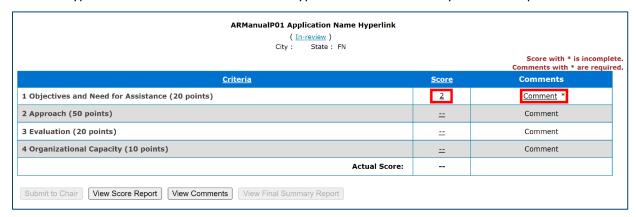




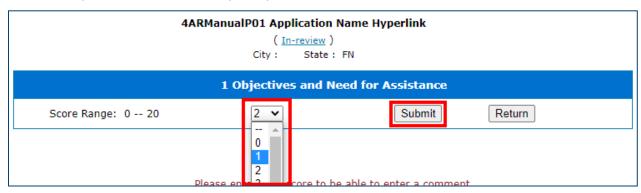
2. Editing your score

You can change your scores at any point during the review if the application is in **In-Review** or **Returned by Chair** Status. To change a score:

1. Click the hyperlinked **Score** value or **Comment** hyperlink for the criterion you wish to update the score.



2. Click the dropdown menu and select your updated score.



3. Click the **Submit Button** to update your score.



Chapter 5: Entering Comments

Overview

This section covers the comments section in ARM. This includes:

- Mandatory Comments
- Entering Comments
- Formatting your Comments
- Save Button
- Editing/Deleting Comments
- Primary Reviewer: Adding Comments to the Summary of Panel Discussion (SPD)

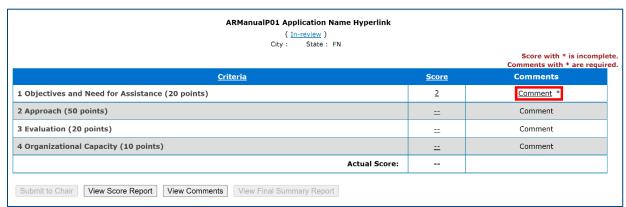
When entering comments there are a few factors to keep in consideration:

- 1. You can only see your scores and comments.
- 2. You must enter a score before you can enter a comment.
- 3. You can edit all comments until you submit your evaluation to the SSO.
- 4. If Mandatory Comments is turned on, you cannot submit your evaluation to the SSO unless you have entered a comment for all criteria requiring at least one comment.
- 5. 30 Minute time out: The system will time you out have after 30 minutes of inactivity.

1. Entering Comments

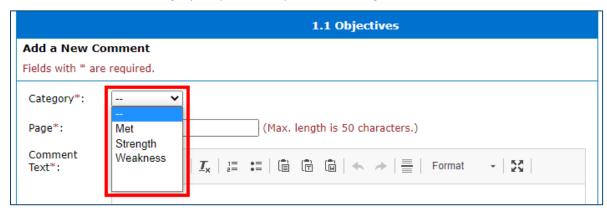
To enter your comments to your **Evaluation**, from the main evaluation screen:

1. Click the <u>Comment</u> hyperlink next to the desired criterion. **Note:** The Comment hyperlink only becomes active once you have submitted a score.

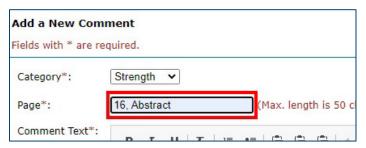




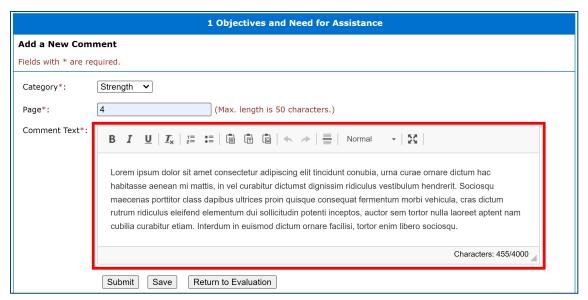
 You will then reach the Add Score Screen with your selected score and comments section. Click the Category dropdown to select the type of comment that you are entering. Note: Depending on how the session is created. the category dropdown may include Strength, Weakness, Met.



3. Type in the **Page number.** This is an alphanumeric text box so you can enter either the page number or text. When capturing the page information, you should follow any guidance provided to you.

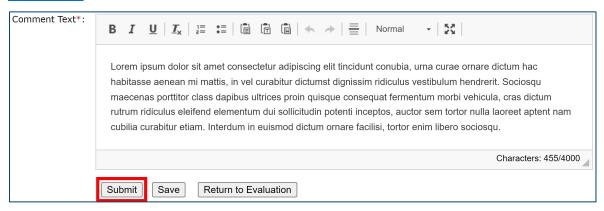


4. Enter your comment in the large textbox. **Note:** You have a **4,000-character** limit per comment. A character count is available at the bottom of the comments text box.

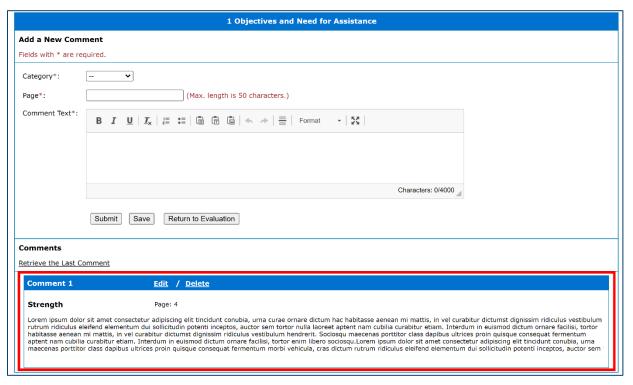




 Click the Submit button to finalize your comment and add it to your evaluation. IMPORTANT: Clicking the Save Button <u>DOES NOT ADD</u> the comment to your evaluation. See <u>Chapter 5 Entering Comments: 4.2 The</u> Save button.



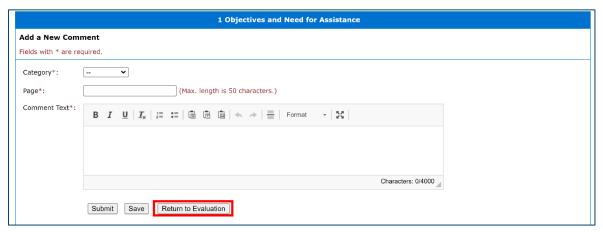
6. After clicking **Submit**, the **Category** field, **Page** field and **Comments** text box will clear, and your comment will now appear below the large textbox.



7. Repeat the steps above to add any additional comments for the specific criterion. You can add as many comments as needed.

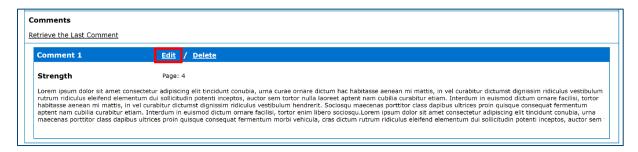


Once you completed entering comments for a specific criterion, click the **Return to Evaluation Button** or the **Evaluation** hyperlink in the breadcrumb trail to return to the Evaluation screen to complete the process for all remaining criteria.

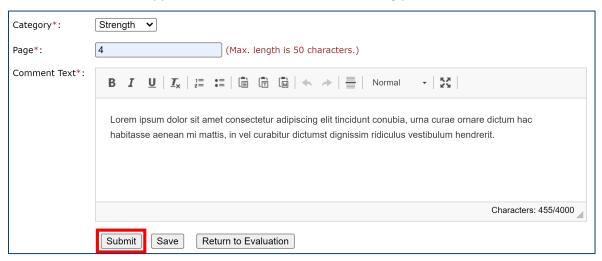


2. Editing Comments

1. To edit comments, click the **Edit** hyperlink next to the comment number.



2. The comment will now appear in the comments text box allowing you to edit the comment.

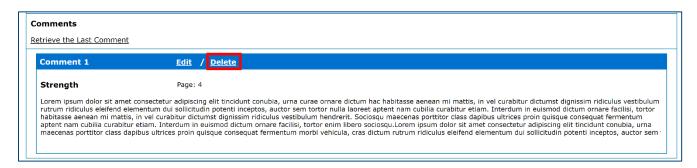




- Click the Submit button to finalize your edits and update your evaluation. IMPORTANT: Clicking the Save Button <u>DOES NOT ADD</u> the comment to your evaluation. See <u>Chapter 5 Entering Comments: 4.2 The Save button.</u>
- 4. After clicking Submit, the Category field, Page field and Comments text box will clear, and your comment will now appear below the large textbox.

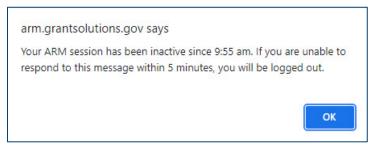
3. Deleting Comments

1. To delete comments, click the <u>Delete</u> hyperlink next to the desired comment number. **Note**: Deleting a comment will permanently remove it from your evaluation.



4. System Timeout and Saving your work

Per federal regulations, and to provide maximum data security, there is a 30-minute timeout feature in ARM that will log you out after 30 minutes of inactivity. You will receive a 5-minute warning. Only clicking buttons and hyperlinks are considered activity, not typing text. Each click of a button or hyperlink will reset the timeout clock.



To prevent loss of comments you can work outside of ARM to draft your comments, or you can work directly in ARM and use the save button under the comments text box.

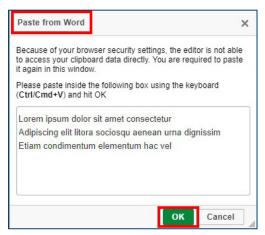


4.1 Working Outside the ARM System

You can draft your comments in a word processing program such as Microsoft Word and then paste them into ARM. There are three different pasting options available, which are paste, paste as plain text, and paste from word. **Note**: You can also use CTRL to paste your comments directly from a word processing program. The comments section has been updated to avoid issues where characters are converted to pound signs (#) or question marks (?) in the Final summary report.



This feature allows you to copy/paste comments drafted in a word processing program such as Microsoft Word directly into the ARM System. After clicking on either of the pasting options, a text box will open in which you will paste your comment:



Important: When pasting your comments into ARM make sure that you are pasting the comments to the correct criterion and that, you are not combining comments that are different categories.

4.2 The Save button

If working directly in ARM, when entering comments, you can use the **Save** button to save progress and reset the 30-minute timer.

Important:

- Saving a comment DOES NOT add the comment to your evaluation.
- If editing a comment, clicking the Save button WILL NOT UPDATE the comment on your evaluation. You MUST click the Submit button to update the comment.
- You DO NOT need to click the save button before clicking the submit button.
- Before leaving/exiting the Add Score screen make sure that comments text box is cleared.

Tip: To avoid if you are exiting ARM or navigating to another screen click the **submit** button to add the comment to your evaluation and then click the edit link to continue modifying the comment.

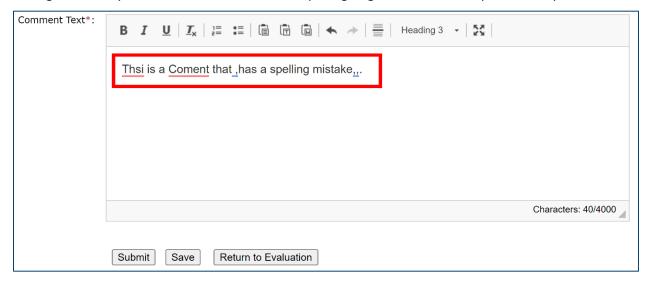


5. Spell Check and Grammar Check

ARM automatically checks spelling and grammar as enter you comment in the comments text box. Just like in other word processing and email systems, spelling mistakes are identified by a wavy red line and errors in grammar are identified by a wavy blue line.

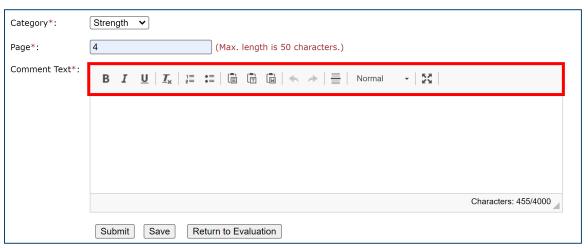
To make corrections you can either:

- Typing over the word or manually correcting the grammar, or
- Use right click on your mouse to find the correct spelling or grammar from the presented options.



6. Formatting Comments

The Comment Section provides additional functionality and the ability to format your comments. These tools are located at the top of the comment's textbox.





1. **Bold**, *Italic*, Underline: This feature allows you to format your comments.



2. **Remove Formatting:** This allows you to remove the existing text format to normal text.



3. Number List, Bullet Point list: This allows you to use numbered lists or bullet points.

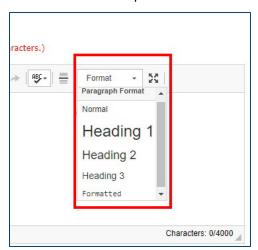


4. **Insert a line:** This allows you to insert a line between comments.

Note: Strength/weakness comments should be entered into ARM separately. Reviewers should not be using the feature to combine your strength and weakness comments.



5. Format: This feature provides additional formatting format styles:



6. **Expand:** This feature allows you to expand the comment text box.



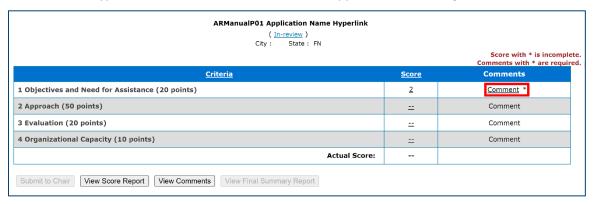
To return to the normal view to add your comment to the ARM System, click on the same button.

Note: Do not click back on your browser as this will result in losing your comment.



7. Mandatory Comments

Depending on the Agency you are reviewing for, Administrators have the option to enforce the entry of comments for all or specific criteria. If the feature is turned on, you will be required to enter at least one comment for you to submit your evaluation to the SSO. The criterion for which a comment is required can be identified by an asterisk next to the Comment Hyperlink. **Note:** The asterisks do not disappear after entering a comment.





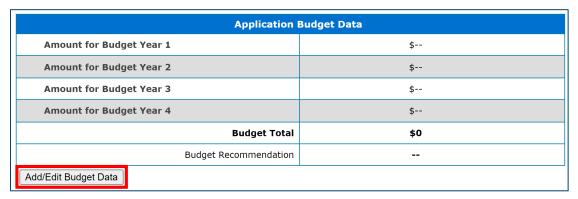
Chapter 6: Application Budget Data, Priority Points, and Preference

Overview

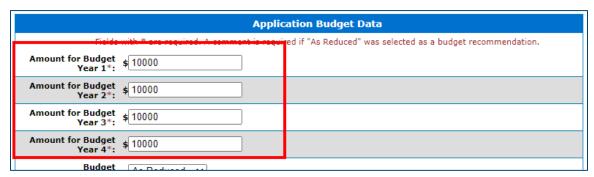
This section focuses on the Application Budget Data, Priority Points Question(s), and Preference Question(s) for Model 4. For guidance on how to manage the Final Summary Report, please refer to Chapters 4: Entering Scores and Chapter 5: Entering Comments.

1. How to complete the Application Budget Data Section

1. Click Add/Edit Budget Data button to enter the consensus budget data.



2. Enter **budget information for** all fields with red asterisks.

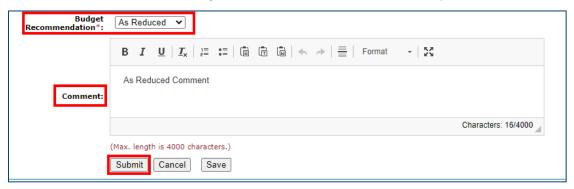




3. Select the Budget Recommendation from the dropdown menu.

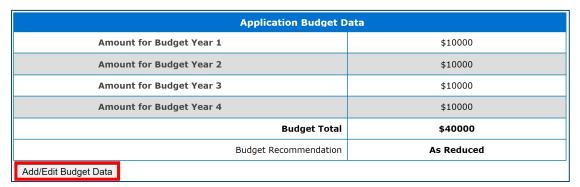
	Application Budget Data							
Fields wi	Fields with * are required. A comment is required if "As Reduced" was selected as a budget recommendation.							
Amount for Budget Year 1*:	Amount for Budget Year 1*: \$\[10000 \]							
Amount for Budget Year 2*:	\$ 10000							
Amount for Budget Year 3*:	\$ 10000							
Amount for Budget Year 4*:	\$ 10000							
Budget Recommendation*:	As Reduced V							
	As Requested As Reduced □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □ □							

4. If As Reduced is selected as a Budget Recommendation a comment is required.



5. Click the Submit button when you are done. Important: The Cancel button allows you to return to the evaluations screen. The Save button allows you to rest the 30-minute timeout. IMPORTANT: Clicking the Save Button <u>DOES NOT ADD</u> the comment to your evaluation. See <u>Chapter 5 Entering Comments:</u> 4.2 The Save button.

After clicking Submit you will return to the evaluation page with the **Application Budget Data** table reflecting your entries. Click the **Add/Edit Budget Data** button to update your entries.



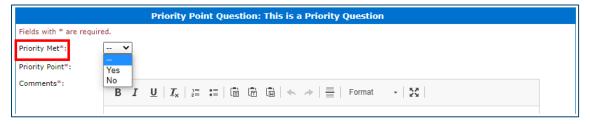


2. How to complete the Priority Points Question(s) (Optional)

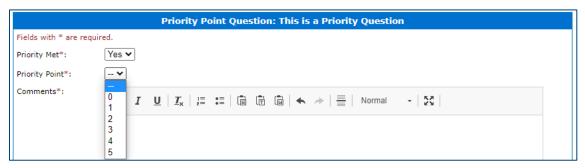
1. Click the Add/Edit hyperlink.

Priority Points Question(s)	Priority Met	Priority Point	Operation
This is a Priority Question			Add/Edit

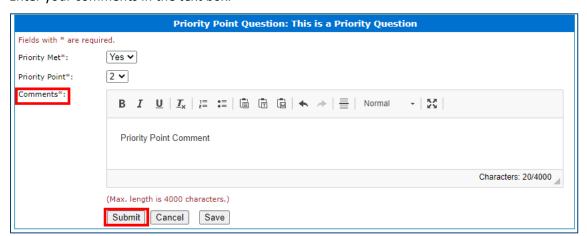
2. Click the **Priority Met drop-down** menu and select **Yes** or **No**.



3. Click the **Priority Point drop-down menu** and select a value.



4. Enter your comments in the text box.



6. Click Submit button when you are done or save the comment and work on it later. Important: The Cancel button allows you to return to the evaluations screen. The Save button allows you to reset the 30-minute time-out function. IMPORTANT: Clicking the Save Button DOES NOT ADD the comment to your evaluation. See Chapter 5 Entering Comments: 4.2 The Save button.

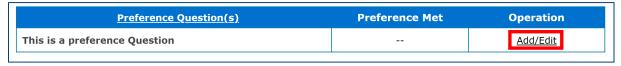


After clicking **Submit** you will return to the evaluation page with the **Priority Points Question(s)** table reflecting your entries. To update your entries, click the **Add/Edit** link.

<u>Priority Points Question(s)</u>	Priority Met	Priority Point	Operation
This is a Priority Question	Yes	2	Add/Edit

3. How to complete the Preference Question(s) Section (Optional)

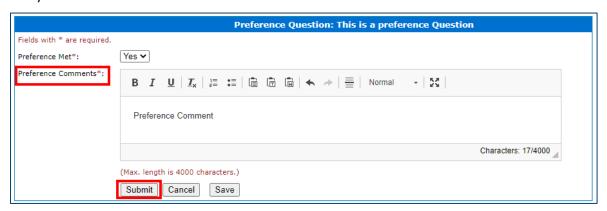
1. Click the Add/Edit hyperlink under the operation column.



2. Click the Preference Met drop-down menu and select Yes or No.



3. Add your comments in the Preference comments box.



4. Click Submit button when you are done or save the comment and work on it later. Important: The Cancel button allows you to return to the evaluations screen. The Save button allows you to reset the 30-minute time-out function. IMPORTANT: Clicking the Save Button DOES NOT ADD the comment to your evaluation. See Chapter 5 Entering Comments: 4.2 The Save button.

After clicking **Submit** you will return to the evaluation page with the **Preference Question(s)** table reflecting your entries. To makes changes to your entries click on **Add/**Edit link.

<u>Preference Question(s)</u>	Preference Met	Operation
This is a preference Question	Yes	Add/Edit



Chapter 7: Reviewing your Evaluation

Overview

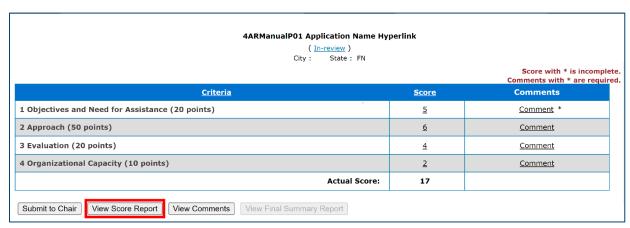
Reviewing your evaluation prior to submitting to the SSO is a crucial step in the review process as once you submit you will be unable to make changes. Your comments and scores are used in the compilation of comments but the SSO and can be provided to application. This section covers:

- How to view the score report
- How to view the Comments Report

1. How to view the Score Report

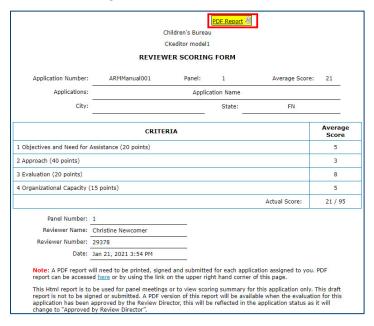
At any time during your evaluation process, you can view a score report and view all your comments. Viewing your scores and comments after completing your evaluation can be an important and useful step before submitting your evaluation to the SSO, as it allows you to review and proofread all scores and comments in one location.

On the Evaluation screen, click the **View Score Report** button to view the HTML version of your score report in a new tab or window.





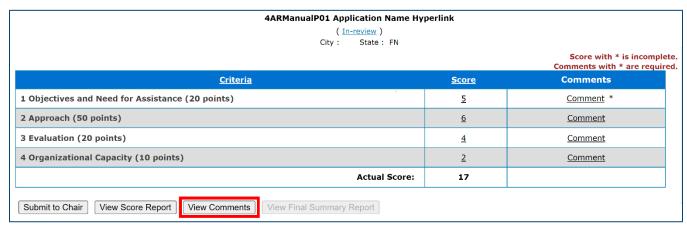
1. This report lists all scoring and non-scoring criteria with your scores (and responses to any non-scoring criteria) listed. **Note**: You will notice a yellow highlighted <u>PDF Report</u> hyperlink in the upper right of the HTML score report. Initially, that hyperlink will be inactive but may be used during review session closeout. Go to the Printing of Final Documents section below for more details.



- 2. Review the score report to ensure that you have added all required responses.
- 3. Close the score report when you are finished. You can then proceed to make changes or check your comments.

2. How to view the Comments Report

1. On the Evaluation screen, click the **View Comments** button to view a version of your comments in a new tab or window.





2. This report lists all your comments. The comments are listed by criterion, separated into Strength comments first followed by Weakness comments.

	INDIVI	DUAL REVIEWE	R'S COMMENTS	3	
ID:	-	Panel:	1		
Applications:		Applicat	ion Name		
City:			State:	FN	
SCORING CRITER	IA .				Page
	eed for Assistance (2	<u>O points)</u>			
<u>Strength</u>				721 (1993)	
	: amet consectetur adip e ultrices hac eros ligula		inceptos turpis nos	tra fusce non	4
<u>Weakness</u>					
Pulvinar tellus parturient vestibulum nisi mi turpis non enim, tortor eu morbi platea nostra eget imperdiet.				5	
2 Approach (40 poi	<u>nts)</u>				
<u>Strength</u>					
Lacinia class maecenas orci magna curae fringilla habitant, proin turpis vestibulum non.				6	
<u>Weakness</u>					
Imperdiet montes soll	licitudin, taciti suspend	isse phasellus conub	ia curabitur sociis.		7
3 Evaluation (20 po	<u>ints)</u>				
Strength					
Condimentum aenean	lobortis fringilla duis s	odales mauris eleife	nd parturient ids lu	ctus ultricies.	Category 1
<u>Weakness</u>					
Laoreet sociis risus pharetra integer litora turpis quisque condimentum, viverra aliquet aptent iaculis eget diam dictumst penatibus nisi.			11		
4 Organizational Ca	pacity (15 points)				
<u>Strength</u>					
Aliquam augue mattis	ac ad, hendrerit dui.				Budget
<u>Weakness</u>					
Lorem ipsum dolor sit	amet, consectetur adi	piscing elit cum, sen	ectus lobortis male	suada.	3
Panel Number	r: 1				
Reviewer Name	: Christine Newcomer	r			
Reviewer Numbe	r: 29378	773			
Date	3an 21, 2021 5:04 F	PM			

- 3. Review the score report to ensure that you have added all required responses. **Note**: If mandatory responses are required and the **Submit to Chair or Submit to Notetaker** buttons are greyed out, this report can also be used to help identify which criterion you have not entered a comment.
- 4. Close the score report when you are finished.



Chapter 8: Submitting your Evaluation

Overview

Once you have completed your review of an application by entering scores and comments, you will need to submit your evaluation to the SSO as part of the review process. The SSO will not be able to view your comments and scores until the application is in a **Submitted** Status.

This section covers:

- Submitting an Evaluation
- · Accessing the Final Summary Report (FSR) during the review
- Managing an inactive Submit/Finalize button
- How to check if you have entered scores
- · How to check if you have entered comments

Submitting an Evaluation:

When you are finished entering all necessary comments and scores, you will be ready to submit the evaluations to the SSO.

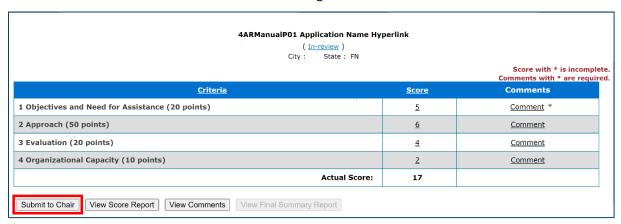
Before submitting your evaluations a few things of note:

- Submit to Chair button will be inactive until you have entered scores for all scoring criteria.
- Comments may be required for the submit button to become active.
- The status of the application will change from **In-Review** to **Submitted to Chair.** (See <u>Appendix B:</u> Application Status Definitions).
- Once an evaluation is submitted, you will no longer be able to edit your scores and comments unless the
 evaluation is returned to you by the SSO. Note: Please make sure to review your scores, comments and
 entries.
- You will still be able to view your scores and comments.
- You can access the Final Summary Report.



1. How to Submit Evaluations to the SSO

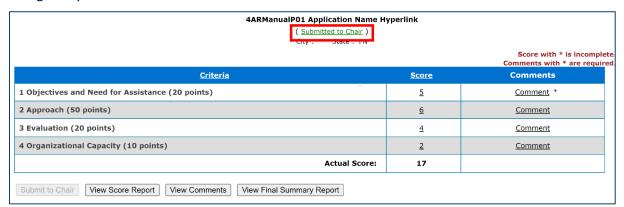
1. On the Evaluation screen, click the **Submit to Chair** button. Note: Please remember to verify that your scores and comments are finalized before submitting them.



1. Click the OK button in the confirmation box.



2. The status of your evaluation will then change to **Submitted to Chair.** You will be unable to make any changes to your scores or comments.





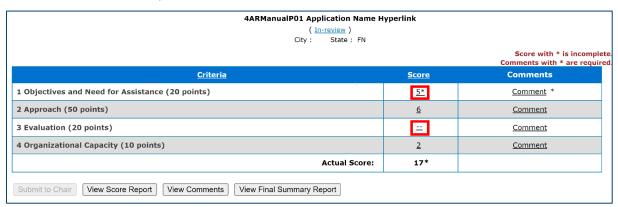
2. Troubleshooting: Greyed out Submit button

If upon completing your review of an application, the **Submit to Chair** button is still inactive you will need to either:

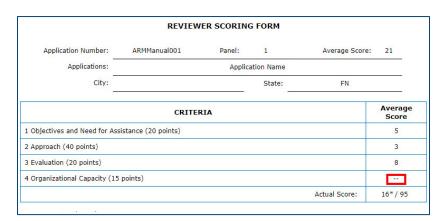
- 1. Check that you have entered scores for all scoring criteria.
- 2. Check that a least one comment has been entered for all criteria (Scoring and Non-Scoring) requiring a comment. (If applicable)

2.1 How to check if you have entered scores?

1. On the **Evaluation Screen**, a Criterion that is missing a score can be identified by either a **double dash (--**) in the score column or by an asterisk next to a score in the score column.



You can also click on the **View Score Report** button to view the HTML version of the score report to help identify which criterion you have not entered a score for.



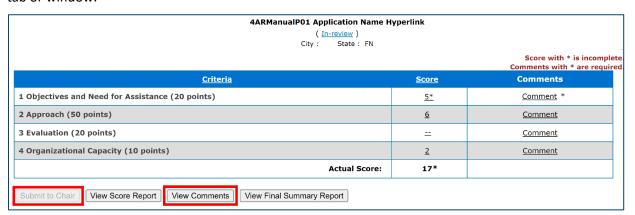
2. Once you have entered the missing score(s), the **Submit to Chair** button will become active. **Note**: You should follow guidance from the Program Team if a comment is required to justify the score.

If the Submit button is still inactive then you will need to check if you have entered comments.



2.2 How to check if you have entered comments?

1. On the Evaluation screen, click the **View Comments** button to view a version of your comments in a new tab or window.



2. You can identify a criterion that you have not entered a comment for if you see **None** listed under strength and weakness with no page numbers.



3. Once you have identified the criterion or criteria that you have not entered comments for, return to the main evaluation screen and then follow the steps on entering comments. **Note:** You can keep the comments report open as it opens in a new tab or window while updating your evaluation.

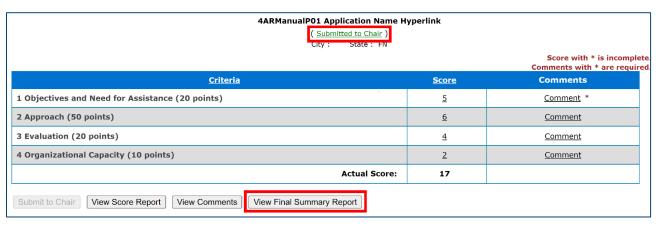
Once you have added the missing comments, the **Submit** will become active.



3. Accessing the Final Summary Report (FSR) during the review

The Final Summary Report (FSR) is a report put together by the SSO and is a compilation of reviewer comments and scores based on your panel discussion. The FSR is then viewed/accepted by the federal staff. As a reviewer, you can access this report during the panel discussions.

1. The **View Final Summary Report** button becomes active once the application is in a **Submitted to Chair** status.



- 2. Click the View Final Summary Report Button.
- 3. The Final Summary Report will open in a new tab. At the top of the report, you will be able to view the average application score. You will then view all comments selected and added by the SSO. The included comments will be organized by criterion, then by strength and weakness along with the page identifying numbers.





If the application is in either one of the following statuses, you will not be able to view the Final Summary Report: "Pre-Review;" "In-Review;" or "Returned by Chair."

4ARManualP01 Application Name Hyperlink				
(<u>In-review</u>) Citv: State:FN				
, and the second		Score with * is incomplete Comments with * are required		
<u>Criteria</u>	<u>Score</u>	Comments		
1 Objectives and Need for Assistance (20 points)	<u>5</u>	<u>Comment</u> *		
2 Approach (50 points)	<u>6</u>	Comment		
3 Evaluation (20 points)	<u>4</u>	<u>Comment</u>		
4 Organizational Capacity (10 points)	<u>2</u>	Comment		
Actual Score:	17			
Submit to Chair View Score Report View Comments View Final Summary Report				

Even though the **View Summary Report** Button becomes available immediately after submitting your evaluation, the SSO must add the Reviewer's comments to the Final Summary Report before you can view them. If no comments have been added, the report will remain blank.

Throughout the panel discussion, the SSO can modify the Final Summary Report by either adding/removing comments or by editing a comment or adding their comments. As a reviewer, you can view these modifications by either simply refreshing the tab or by closing the tab and re-clicking on the **View Summary Report** button.



Chapter 9: Returned Evaluation and Return History

Overview

Once an evaluation is in a **Submitted** status, you will be unable to make any changes to your scores and comments. However, the SSO does have the ability to return your evaluation. When your evaluation is returned to you, the status of the application will change from a **Submitted** status to a **Returned** status and the **SSO** must provide feedback on requested changes.

As a reviewer, you can view the feedback and once you have read and considered the feedback, you will be ready This section will cover:

- How to view the Return History
- Editing and re-submitting your Evaluations

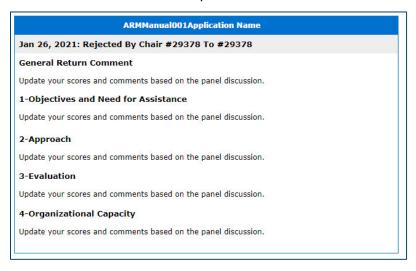
1. How to view the Return History

- 1. When a **SSO** returns an evaluation to you, the status of that evaluation will change to **Returned by Chair**. If notifications are turned on, you will receive an email from no_reply@grantsolutions.gov that an evaluation has been returned.
- 2. On either the Application List screen or the Evaluation screen, click the **Returned by** status hyperlink.





3. The **Return History** screen will open in a new tab or window, and it will detail the reasons why the SSO has returned the evaluation for you.



Note: To protect the transparency of the process, the feedback provided by the SSO or Review Director, or Panel Manager is visible to all reviewers assigned to the application. You may have to identify which feedback is relevant to your evaluation. Clicking on this status hyperlink at any time, regardless of the status, will display the entire Return History of the application.

2. Editing Evaluations and Resubmitting to the SSO

- 1. Once you have read and considered the feedback, you are then able to make any changes to the Evaluation. Follow the steps in Chapter 4: Entering Scores and Chapter 5: Entering Comments to update your scores and comments.
- 2. Once all necessary changes are made, you must then re-submit your evaluations to the panel SSO.



Appendix A: Role Definitions

Overview

The ARM roles are hierarchical in nature, providing the foundation for an application review workflow. The roles in ARM are generally defined as they apply to their use in the ARM Models for which they are engaged.

Role Definitions

Agency Administrator (ADMIN): The primary function of an Agency Administrator is to create and manage review sessions including, but not limited to, the management of users, applications, and reporting. A user assigned to this role can create and assign users in all other roles, Session Administrator, Review Director Program Area Manager, SSO, Chairperson, and Reviewer. An Agency Administrator can access all review sessions which exist within their defined agency, and they can view all assigned users for all other non-Administrator roles within their agency. This role, by default, also has access to serve as a Review Director.

Session Administrator (SA): The primary function of a Session Administrator is to create and manage their assigned review sessions including, but not limited to, the management of users, applications, and reporting. A user assigned to this role can create and assign users in the roles of Review Director, Chairperson, SSO and Reviewer. They can also create new review sessions and view them but cannot access review sessions created by other Session Administrators, unless assigned by the creating Session Admin or the Agency Administrator. As new Review Directors are created by a Session Administrator, they are added to the global pool of users for that agency and are available to be assigned for future sessions. This role, by default, also has access to serve as a Review Director for their assigned sessions.

Review Director (RD): The primary functions of this role are to monitor the review while in progress and provide final approval for all application evaluations in ARM, certifying the review is complete. Generally, this role is filled by Federal program staff. Users with the RD role cannot create new system users and can only access sessions that have assigned to them by the Agency Administrator or a Session Administrator.

SSO: The primary system function of this role is to compile the Reviewer's comments into a final summary report produced in ARM and to ensure the scores meet consensus if that is required by the review. The Chairperson can only access sessions and panels assigned to them. SSO's serve as the liaison between the RD and the Reviewers, and are responsible for ensuring all assigned applications meet the objective of the review when provided to the RD. A SSO often has duties outside of the system to facilitate the panel discussion and coordinate the Reviewers.

Chairperson: The primary system function of this role is managing the certification process and the voting process. The Chairperson can only access sessions and panels assigned to them. Chairperson will work with the SSO and are responsible for ensuring all assigned applications meet the objective of the review when provided to the RD. A SSO often has duties outside of the system to facilitate the panel discussion and coordinate the Reviewers.



Reviewer: Individuals assigned to a panel with a set of applications for which they are responsible for providing scores and/or comments as required, reviewing each application's content against the evaluation criteria. The primary role of a reviewer is to read the grant application and assign scores based on the criteria setup for that particular review session. After entering scores for each criterion, the reviewer may enter comments (strengths and weaknesses) to justify the scores assigned to each criterion. The reviewer then submits the evaluation to the panel SSO.



Appendix B: Application Status Definitions

Looking at the status of applications allows you to determine at what stage an application is in.

Pre-Review: The Reviewer has control of the application but has not started scoring and commenting.

In Review: The Reviewer has control of the application and has not yet submitted the application evaluation to the SSO. Scoring and commenting are in progress.

Submitted to Chair: All reviewers have completed the evaluations for the application and have submitted them to the SSO. The SSO has control of the application and can begin creating the Final Summary Report, and Reviewers cannot make any changes to their evaluations.

Returned by Chair: The SSO has identified changes in the evaluation that need to be addressed by the Reviewer. The SSO has returned the application to the Reviewer's control for additional work. A SSO will not have visibility to a reviewer's scores while an evaluation is in this status.

Submitted to Review Director: All Reviewers have submitted their evaluations to the SSO, and the SSO has created the Final Summary report and submitted it to the Review Director. The Review Director has control of the application to provide final approval. The panel can no longer make changes to individual evaluations or the Final Summary Report.

Returned by Review Director: The Review Director has identified changes in the Final Summary Report that needs to be addressed by the panel. The Chairperson now has control of the application for him/her to address or for him/her to return to the Reviewers for them to address. A Review Director cannot edit any Reviewer scores, nor make edits to any comments.

Not Recommended: In a review that requires panel voting, a majority of the panel has voted not to consider the application for funding. Some HRSA programs require that a panel decide by majority vote whether an application is worthy of consideration for funding. The vote will be called for by the Chair, once the panel has agreed upon consensus statements of criteria strengths and weaknesses, but before any reconsideration of score.

Accepted: The Review Director is satisfied with the Final Summary Report and provides final approval of that application. No further changes are required or permitted. The Accepted status signifies the beginning of the closeout process for panelists.

Certification Pending: In a review that requires panel voting, a majority of the panel has voted not to consider the application for funding. Some HRSA programs require that a panel decide by majority vote whether an application is worthy of consideration for funding. The vote will be called for by the Chair, once the panel has agreed upon consensus statements of criteria strengths and weaknesses, but before any reconsideration of score. The certification pending status indicates that the Chair is the process of completing the Application Certification Process.





Certification Complete: This status indicates that the Chair has met with the panel, completed the panel voting process and has Certified the review.